



Atacama Large Millimeter / submillimeter Array

ALMA Helpdesk: Staff Guide


HelpdeskStaffManual_v2.6_ALMA.docx

Version: A2.6

Status: Draft

2012-07-23

Prepared By:		
Name(s) and Signature(s)	Organization	Date
A. Remijan	NRAO/NAASC	2011-07-28
Approved By:		
Name and Signature	Organization	Date
Released By:		
Name and Signature	Organization	Date

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 2 of 56
---	--	--

Change Record

Version	Date	Draft #	Reason/Initiation/Remarks
A	2011-08-08	2.4	Working draft – AJR sends to WG and Triage staff for review and comment.
A	2011-09-20	2.5	Revision by J. Crossley and A. Hale. Incorporating comments from J. Hibbard and A. Remijan.
A	2012-07-23	2.6	Revision by A. Hale. Updated section 4.3 and Section 3




	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 3 of 56
---	--	--

Table of Contents

1	SUPPORTING MATERIAL	5
1.1	ACRONYMS	5
1.2	RELATED DOCUMENTS	6
2	INTRODUCTION AND CONCEPTS	7
2.1	USER AND STAFF ROLES	7
2.2	STAFF ROLES	8
2.2.1	<i>Triage Role</i>	8
2.2.2	<i>USS Role</i>	9
2.2.3	<i>Manager Role</i>	9
2.3	TICKET LIFE-CYCLE	9
2.3.1	<i>Open</i>	10
2.3.2	<i>Pending</i>	10
2.3.3	<i>Resolved</i>	10
2.3.4	<i>Response Overdue</i>	10
2.3.5	<i>Closed</i>	11
3	ALMA HELPDESK DEPARTMENTS	12
3.1	PROPOSAL SUBMISSION EMERGENCY DEPARTMENT	13
4	GETTING INPUT FROM OTHER PARTS OF THE PROJECT	14
4.1	TRANSFER OF TICKETS BETWEEN ARCS	14
4.2	TRANSFER OF TICKETS TO THE PROPOSAL HANDLING TEAM	15
4.1	TRANSFER OF TICKETS TO THE CHANGE REQUEST STANDING COMMITTEE	15
3	SERVICE PROCEDURE	16
3.1	ETHICS IN USS SUPPORT	18
3.2	MANAGEMENT	18
4	PROCEDURES FOR RESPONDING TO TICKETS – TRIAGE	19
4.1	EXAMINING A TICKET	19
4.1.1	<i>Assigning a Ticket</i>	20
4.1.2	<i>Posting a Reply to a Ticket</i>	22
4.1.3	<i>Changing the Status of a Ticket</i>	23
4.2	CHANGING THE DEPARTMENT OF A TICKET	24
4.3	ADDING NOTES TO A TICKET	25
4.4	FORWARDING TICKETS	26
4.5	ADDING A KNOWLEDGEBASE ARTICLE	27
4.6	SUMMARY OF TRIAGE WORKFLOW	29
5	STAFF INTERFACE DETAILS	29
5.1	STAFF VIEW: LOGGING IN	29
5.2	“HOME” TAB	31
5.3	ALERTS	31
5.4	“TICKETS” TAB	33

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 4 of 56
---	--	--


5.4.1	Viewing Tickets	33
5.4.2	Filters and Ticket Searches.....	35
5.4.2.1	User Created Filters	36
6	PROCEDURE FOR RESPONDING TO TICKETS – USS	36
7	DRAFTING AND PUBLISHING KNOWLEDGEBASE ARTICLES	37
8	REPORTS AND TICKET TRACKING	38
A.	APPENDIX: HELPDESK ENTRY FORMS	40
B.	APPENDIX: REPORT AND TICKET TRACKING SCREENS	48
C.	APPENDIX: USS CHECKLIST FOR ANSWERING HELPDESK TICKETS	52
D.	APPENDIX: SOFTWARE BUG-REPORTING SYSTEMS.....	53
	CASA	53
	Observing Tool.....	54
	ALMA Science Archive.....	54
	SPLATALOGUE	55
	SIMDATA.....	55
	Ph1M.....	56
	Project Tracker	56

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 5 of 56
---	--	--

1 Supporting Material

1.1 Acronyms

ALMA	Atacama Large (sub)Millimeter Array
AOP	ALMA Operations Plan
ARC	ALMA Regional Center
CASA	Common Astronomy Software Applications
CRSC	Change Request Standing Committee
DSO	Department of Science Operations
EA	East Asia
ESA	European Space Agency
ESO	European Organization for Astronomical Research in the Southern Hemisphere
EU	Europe
Euro-VO	European Virtual Observatory
EVLA	Expanded Very Large Array
HST	Hubble Space Telescope
IPT	Integrated Product Team
JAO	Joint ALMA Observatory
JIRA	From Wikipedia: “Rather than an acronym, JIRA is a truncation of Gojira (the Japanese name for Godzilla)”
KB	Knowledgebase
MOU	Memo of Understanding
NRAO	National Radio Astronomy Observatory
NA	North America
OT	Observing Tool
PHT	Proposal Handling Team
PI	Principal Investigator
SMS	Short Message Service
USS	User Support Specialist
VAO	Virtual Astronomical Observatory


	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 6 of 56
---	--	--

1.2 Related Documents

No.	Title	Authors	Version & Date	AEDM ID or document name
RD1	ALMA Helpdesk: Requirements	Various	Version B0, 2011-07-27	AEDM# TBD
RD2	Kayako SupportSuite	Various	V3.6, revision 13	http://www.kayako.com/manuals/
RD3	ALMA Phase 2 Procedure Document	Various	TBD	AEDM# TBD
RD4	Phase II Process and Change Request Procedures (Cycle 0)	Various	A3b, 2011-10-07	AEDM# TBD

Additional helpdesk documentation can be found at:

<https://sites.google.com/site/almacommunityoutreach/arc-workflow-folders/helpdesk-materials>

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 7 of 56
---	--	--

2 Introduction and Concepts

The Atacama Large Millimeter/submillimeter Array (ALMA) helpdesk provides a mechanism for keeping track of user queries, thus ensuring that queries are answered in a timely and professional manner. The helpdesk also provides a Knowledgebase (KB), which can be used to find answers to common queries without the need to submit a helpdesk ticket and without the user actually logging into the helpdesk system.


The helpdesk software, *SupportSuite*, is a product of Kayako Infotech Ltd., and is in use in a number of other astronomical environments such as Spitzer, Herschel, European Space Agency (ESA), European Virtual Observatory (Euro-VO) and the National Radio Astronomy Observatory (NRAO). It is highly configurable and customizable, and a detailed description of what is available is given in the Kayako manual. This guide is intended as a reference for ALMA staff, providing an overview of key features of our particular implementation of the Kayako helpdesk.

The helpdesk consists of a single instance of Kayako that contains one “workgroup” for each ALMA Regional Center (ARC). This way, staff at each ARC see only the departments and tickets in their ARC’s workgroup and can also set specific workflow assignments for their workgroups in addition to the overall agreed upon workflow across ARCs. There is a mechanism for transferring tickets between ARCs as well as submitting tickets to the Proposal Handling Team (PHT) and the Change Request Standing Committee (CRSC). It is the goal of the helpdesk to “transfer knowledge and not tickets.” So, the transfer of tickets between ARCs should be done sparingly and be contained to only those tickets that require specialized expertise from a particular User Support Specialist (USS) from another ARC.

2.1 User and Staff Roles

Kayako keeps user and staff roles separate. Users access the helpdesk system under the ALMA Science Portal. Staff with responsibility for answering tickets (USS) will have separate “staff” helpdesk accounts (i.e. accounts separate from the ALMA Science Portal) to log into the helpdesk.

USS should not usually need to submit tickets as users except under special circumstances. To submit a ticket as a user, a staff member would login to the user portal using their ALMA user ID and password (obtained through self-registration on the Science Portal) and click on the “Helpdesk” tab to obtain the user interface to the helpdesk.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 8 of 56
---	--	--

Note that there is currently no relation between the ALMA user ID and the Kayako staff ID. A staff member is free to set up the same username and password for both, but any change in the accounts (for example, a password change) will not be transferred to the other account.

Staff can either request an individualized username and password through their helpdesk manager or helpdesk administrator or they will be assigned a generic username (commonly first initial and lastname) and password as well as default “alerts” specific to their helpdesk role. The password for the staff role can be changed under the preferences tab (Section 7.2) in the Kayako environment. Recovery of the username and password for USER accounts are to be handled by the ALMA Science Portal support team.

A USS may sometimes have to submit a ticket on behalf of a user. This may happen in the case where a ticket concerns more than one problem area (e.g. question on the Observing Tool [OT] and Simulator in one ticket) or the user is having problems logging into the helpdesk via the Science Portal. In order to do this properly, under the “Tickets” tab, select “New Ticket”, “Send email” and then choose the correct department in which to open the new ticket. If it is necessary to open a new ticket on behalf of the user, it is important to use the “Lookup” option (click on the small binoculars) to find the correct user and email address when entering in the “User E-mail Address” field. NOTE: Users must be first authenticated with the ALMA helpdesk in order for a ticket to be opened on their behalf. A ticket cannot be opened for unauthenticated users.

2.2 Staff Roles


We have a specific workflow in mind based on feedback from observatories such as Spitzer, Hubble Space Telescope (HST), and ESO. The basic workflow is illustrated in Figure 1. Full details are given below:

2.2.1 Triage Role

Triage will usually be performed by a USS or the helpdesk Manager or other designated individuals identified by each individual ARC. Triage can perform one of four tasks when a helpdesk ticket is submitted (see Figure 1). Triage can:

1. Assign the ticket to himself or herself, post a reply and resolve the ticket.
2. Assign the ticket to another USS if they do not have the requisite expertise or to properly distribute the workflow across the ARC staff.
3. Assign the ticket to another ARC, the PHT or CRSC as described in Section 4.
4. Request more information from the user who submitted the ticket and change the status of the ticket to “Pending” (Sections 2.3.2 and 6.1.3)

Triage can see all departments within the ARC in their view; in addition they can see the “Transfer to XX ARC” departments, Proposal Handling and Proposal Change Requests

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 9 of 56
---	--	--

Departments, which enable them to transfer tickets between ARCs, the PHT or CRSC, respectively. However, as the goal is to “transfer knowledge and not tickets”, the transfer of tickets between ARCs should be done sparingly (Section 4).

2.2.2 USS Role

A USS will, in general, be able to answer any ticket based on his/her expertise. A USS can perform one of four tasks when assigned a ticket (See Figure 1). They may:

1. Post a reply that resolves the ticket and set the ticket status to “Resolved”.
2. Request more information from the user who submitted the ticket and change the status of the ticket to “Pending” (Sections 2.3.2 and 6.1.3)
3. Return a ticket to triage if they (Section 6.2):
 - a. Are unavailable to answer the ticket in a timely fashion
 - b. believe it should be assigned to another ARC
 - c. find that the ticket requires a level of expertise that they themselves do not possess.
 - d. Find the ticket needs to be transferred to the Proposal Handling or Proposal Change Request departments.
4. File a ticket in the appropriate bug-reporting system and change the status of the helpdesk ticket to “Resolved” (Section 2.3.3)


As such, USSs are set up to see all of the departments to which users can submit tickets, and an additional “Return to Triage” department. They cannot see the “Transfer to XX ARC”, Proposal Handling or Proposal Change Request departments, which are only visible to triage and managers.

2.2.3 Manager Role

We have also included a description of the role of helpdesk manager (Section 5.2). The manager will have oversight of the helpdesk, and overall responsibility for tracking tickets. In addition, the helpdesk manager will be responsible for ensuring adequate coverage from all USS in their ARC to guarantee a timely response of all submissions to that ARC from the user community. The manner in which this coverage is recorded and tracked is left to the manager of each ARC.

2.3 Ticket life-cycle

Our instance of Kayako allows the ticket to be assigned a particular status. The description of each status is below and illustrated in Figure 1.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 10 of 56
---	--	---

2.3.1 Open

A ticket is considered “Open” while work is being performed on it. If neither Triage nor the assigned USS takes action within 2 working days, the ticket status becomes “Response Overdue” (section 2.3.4).

2.3.2 Pending

Resolution is awaiting response to a follow-up question addressed to the user. A ticket in the pending status will never default to a status of “Response Overdue”.

2.3.3 Resolved

A reply to the ticket has been posted by a USS, which they believe solves the problem. Also, if the user has submitted either a bug report or enhancement request to a software subsystem, e.g. a new feature in SIMDATA or new Virtual Astronomical Observatory (VAO) access to Splatalogue, that ticket should also be posted as “Resolved” and the appropriate ticket should be filed to the corresponding bug-reporting system (Appendix D). The reply will include a request to the user to close the ticket if they are satisfied with the response. This will be generated automatically when the ticket status is set to “Resolved”. If no action is taken by the user, the ticket is “Closed” after 14 days. The user will then be informed that their ticket has been closed.


NOTE: Following standard commercial helpdesk practice, a USS does not close tickets. This is left to the user. The resolved status is necessary so that tickets are not constantly closed and re-opened by users or a USS in the process of answering the ticket. As such, the ticket remains in the “Resolved” status until the user is satisfied with the response.

It is also possible that a user can reply to a “Closed” ticket. This action will automatically re-open the ticket and dialog in the helpdesk. It is appropriate if the user is not happy with the resolution but in this case, triage should see the reply to this ticket which has been automatically re-opened and then request from the user that they open a new ticket if this is a new issue or clarify the response to the ticket if the initial reply did not adequately resolve their issue (Figure 1).

2.3.4 Response Overdue

If there has been no action taken on a ticket by either triage or a USS within the 2 working day time window described in Section 2.3.1, the status of the ticket will change automatically to “Response Overdue”. (See Figure 1).

Also, if a USS replies to a ticket but does NOT set the status to “Resolved” the ticket will remain “Open” indefinitely unless the user changes the status of the ticket to

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 11 of 56
---	--	---


closed. Because of this, it is important for the USS to set the ticket status to “Resolved” after posting a reply (Section 2.3.3).

2.3.5 Closed

A ticket will be set to the “Closed” status if:

- 1) The user has reviewed the response to the resolved ticket, has agreed the answer is satisfactory and closed the ticket
- 2) The ticket is closed implicitly through the user not responding within 14 days of the ticket entering the “Resolved” status
- 3) The ticket subject is inappropriate for resolution by ARC staff (such tickets may be closed directly by Triage or another USS).

Note that “Closed” tickets do not show up in the default ticket views (Figure 2); to view them, change the view to “all tickets” or create a new view. A ticket in the “Closed” status will never default to a status of “Response Overdue”.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 12 of 56
---	--	---

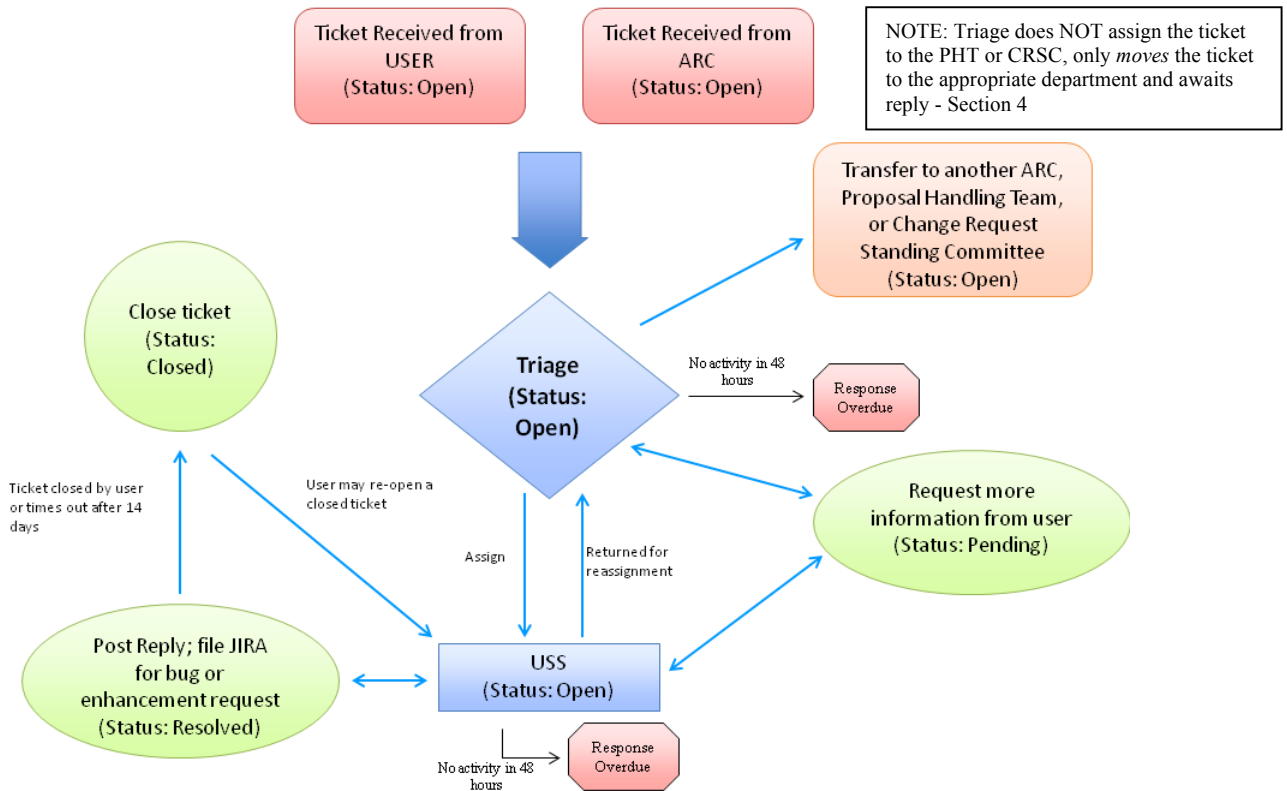



Figure 1: Helpdesk workflow

3 ALMA Helpdesk Departments

The ALMA helpdesk has the following departments set up viewable by a user to send tickets to the user's affiliated ARC:

- General Queries (Science Portal/Registration, Documentation, Webpages, Proposal reviews and assessment, Project tracking, other)
- Project Planning (Available Capabilities, Call for Proposals, Sensitivity Calculator, Simulators, Splatalogue, other)
- OT (Proposal Preparation, Proposal Submission (general), Phase 2 process)
- Data Reduction (Common Astronomy Software Applications [CASA], pipeline processing)
- Archive and Data Retrieval (archive access and queries, obtaining your ALMA data)

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 13 of 56
---	--	---

- Face to Face Support (Data reduction, sabbatical, science, short term, other)

In addition, the ARCs have also set up internal departments in order to request assistance from the PHT and CRSC. These departments are not seen by the users and are only used by ARC staff.

During Cycle 0, each ARC has set up a Cycle 0 Observing Program Department where ARC staff can directly correspond to PI's of accepted projects during the process of scheduling block verification and submission through data collection and processing. Tickets are open by ARC staff on behalf of the PI and the correspondence the ARC staff has with the PI on that particular project is contained in that department. Each ARC has set their own workflow regarding how ARC staff communicate with their PIs and in setting the overall status of tickets. See your local ARC manager for the appropriate workflow for this department.


All three ARCs share a single database, so departments can be set up such that all tickets get sent to a single ARC or to all three ARCs. The single database also allows transfer of tickets between ARCs whilst retaining the ticket ID and work logged on that ticket. A software bug-reporting system has been set up so that ARC personnel can submit tickets to the Department of Science Operations (DSO) in cases where a user ticket finds a bug or requests an enhancement to one of the ALMA software tools, systems or subsystems (Appendix D). The Knowledgebase is also common to all three ARCs and will be described in more detail in Sections 6.5 and 9.

3.1 Proposal Submission Emergency Department

During the last week before the Call for Proposals, a single department called "Proposal Submission Emergency" is set up across ARCs that will answer urgent tickets concerning proposal submission. Triage for this department will start 36 hours before the deadline with 24-hour coverage by Europe (EU), North America (NA) and East Asia (EA). EA will open and EU will close the dept at 15UT according to the following schedule:

- EA: 03 - 09 UT (12PM - 6PM Local Time)
- EU: 09 - 15 UT (11AM - 5PM Local Time)
- NA: 15 - 00 UT (11AM - 8PM Local Time)
- EA: 00 - 08 UT (9AM - 5PM Local Time)
- EU: 08 - 15 UT (10AM - 5PM Local Time) - 15UT - Proposal Deadline

A handoff from one ARC to another will take place when the appropriate time is reached. In addition, a representative from the Joint ALMA Observatory (JAO) will also be "on call" 24 hours per day starting 36 hours before the proposal submission deadline to help

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 14 of 56
---	--	---

resolve urgent problems with proposal submission. Contact information will be available (phone numbers and email addresses) at:

http://wikis.alma.cl/bin/view/DSO/JAO_On_Call_wiki

After the JAO has resolved the problem they will report back to the Triage who reported the problem and the solution. Finally, Triage will contact the users directly by posting replies to the submitted tickets.

4 Getting Input From Other Parts of the Project

There are times when staff outside of a given workflow will need to see a ticket. These staff include, but aren't limited to: specialists at the other ARCs, or staff of the JAO. With this in mind, it's important to remember that only members of the ARCs should interact with their users directly.


4.1 Transfer of Tickets Between ARCs

As discussed in Section 2.2.1, Triage has the ability to transfer tickets between ARCs. This mechanism is intended to allow the helpdesk to leverage the worldwide expertise available to ALMA. However, this process should not be done lightly and the mechanism should be used only in the following circumstance:

- A ticket is submitted and assigned to a USS at one ARC. The USS knows specific expertise exists in another ARC. In general, we prefer that the USS contact the person with expertise at the other ARC directly (on the basis that exchanging knowledge is preferable to exchanging tickets). The solution sent by this other USS should then be contained in the ticket response and in these cases especially, a Knowledgebase article should be published. Failing this, however (for example, if the query is unusually complicated), the ticket can be returned to Triage with a note (Section 6.3) from the USS in the originating ARC explaining the reassignment.

When a request for a ticket to be transferred is sent by a USS back to triage:

- The USS must include a note (Section 6.3) in the ticket that explains why they are requesting reassignment rather than contacting the relevant expert directly.
- Triage should send a reply to the user explaining that their ticket has been transferred to another ARC.
- Upon receipt by the receiving ARC, the ticket should be treated as a new ticket and assigned to the appropriate USS.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 15 of 56
---	--	---

4.2 Transfer of Tickets to the Proposal Handling Team

There are specific times when the PHT will be needed to assist in resolving a helpdesk ticket. The cases that apply to PHT support are: OT emergency submission, proposal handling, and also some cases for proposal assessment (those concerning details of panel or email notifications to Principal Investigators [PIs]). For those tickets that require assistance from the PHT, Triage will follow the workflow listed below:


- Triage will assign the ticket to himself or herself.
 - If triage has already assigned a ticket to a USS and after correspondence with the user, the USS determines the ticket needs to be sent to the PHT, the USS transfers the ticket back to Triage but retains ownership of that ticket.
- He or she then transfers the ticket to one of 3 separate private departments of the helpdesk (Proposal Handling – NA, EA, EU), it is then put in to the “pending” state.
- When a ticket is assigned to this department, the PHT account alerts have been set up so that the PHT will get an email alert that a new ticket has been submitted. A PHT account for the helpdesk will include an email exploder to the entire PHT.
- However, in order for that ARC not to lose control of the ticket, triage does NOT assign the ticket to the PHT.
- The PHT will add a note(s) to the ticket with the resolution.
- The ARC triage staff or USS then replies to the user.

This workflow ensures that only members from the ARCs interact with their users.

4.3 Transfer of Tickets to the Change Request Standing Committee

For those tickets that require assistance from the CRSC, Triage will follow the workflow listed below:

- Triage will assign the ticket to himself or herself or to the contact scientist assigned to user’s project (if one is assigned).
- Information found in the ticket is then transferred to the project ticket (which already exists, or is created if it doesn’t) found in the Software Bug-Reporting System. Refer to [RD3] for the steps taken to accomplish this.
- Refer to [RD4] to determine if the change request is minor or major.
- Minor change requests (e.g. small updates to a source position or velocity, etc.) should be discussed with and approved by the Contact Scientist.
- Major changes (e.g. changing targets, mapping area, spectral windows, or any changes that increase the estimated execution time) are to be discouraged by the Triage staff; though the option of still referring the request to the CRSC should be made.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 16 of 56
---	--	---


- It should be pointed out in the message to the requester that the proposal change request will likely be denied and during review of the request, all observations for their project will be suspended until a decision is made by the CRSC.
- If the requester would still like this referred to the CRSC, Triage then transfers the ticket to one of 3 separate private departments of the helpdesk (Proposal Change Requests – NA, EA, EU) after making sure all the required fields have been properly filled out.
- When a ticket is assigned to this department, the CRSC account alerts have been set up so that the CRSC will get an email alert that a new ticket has been submitted. A CRSC account for the helpdesk will include an email exploder to the entire CRSC.
- However, in order for that ARC not to lose control of the ticket, triage does NOT assign the ticket to the CRSC.
- The CRSC will add a note(s) to the ticket with the resolution.
- The ARC triage staff person or the contact scientist for the project then replies to the user.

This workflow ensures that only members from the ARCs interact with their users.


5 Service Procedure

The ALMA helpdesk will need to have a uniform service level between the ARCs (so far as practical). Replies shall be courteous and professional in tone. In addition, direct emails between the USS and the user (outside the helpdesk) should be avoided so far as possible.

- 1) Users will receive a customized reply to their ticket within 2 working days of receipt by the ARC. Ideally, this would be a resolution of the ticket, but could simply be a statement that the ticket is being worked on and, if possible, with an anticipated timescale for resolution. Ticket replies will be sent through the helpdesk rather than in the form of a personal email.
- 2) If a helpdesk ticket is assigned to a USS by triage, the USS should make sure that “due diligence” is done in order to find the correct resolution to the ticket. In many cases this may mean that a USS may need to review and revise the existing documentation or consult with other experts to resolve the ticket.
- 3) When a ticket is passed to another ARC (section 4.1), the triage at the initial ARC will send a reply to the user through Kayako stating that the ticket has been transferred. When the ticket is received by the recipient ARC, it is treated as a new ticket, with a customized reply being sent within two working days. Responsibility for that ticket is considered transferred to the receiving ARC.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 17 of 56
---	--	---

- 4) Open tickets that require clarification or technical details from the user will be set to “Pending” until the appropriate information is received. At the same time, a reply will be posted to the user stating the ticket status and giving a reason why the ticket has not been resolved.
- 5) When a helpdesk ticket reports a software problem, the USS should provide due diligence to (a) verify that the problem is not a user error, a result of improper documentation, or something other than a true software bug, and, subsequently, (b) attempt to replicate the problem using a system (operating system, software version, etc.) as close as possible to that used by the submitter, provided it is within supported specification for the software in question.
- 6) If a ticket is a verified (see item 5) request for an enhancement or reports a bug to one of the existing ALMA software tools, systems or subsystems, the appropriate USS at each ARC (see Appendix D) should submit a ticket (or similar) to the appropriate agency (typically JAO/DSO or obsCIPT), and “Resolve” the helpdesk ticket stating that a ticket has been filed. There will be a 'known issues' page for each software subsystem that can track bug and enhancement requests (CASA and the ALMA-OT already have said pages) managed by the subsystem scientist. Links to the known issues pages will be available in the helpdesk Knowledgebase. The known issues pages will ensure that the Knowledgebase articles need not be updated for every change in the enhancement request or bug fix status. Therefore, the workflow for a bug report or enhancement request is:
 - a. Triage first checks the “known issues” page to see if the bug or enhancement request has already been posted before assigning the ticket to a USS for verification.
 - b. Following the service rule in item 5, triage or a USS offers due diligence in verifying the bug reported in the ticket using a supported platform as close to user’s as possible.
 - c. Once the bug has been verified, triage assigns the ticket to the cognizant lead or a certified representative (see Appendix D). If the ticket was assigned to a USS, they send it back to triage for reassignment to the lead. A reply is sent to the user stating that their bug report has been sent to the bug reporting system and that they can track the progress of the problem on the known issues page which will be posted to the ticket and made available in a KB article.
 - d. The ticket is then set to “Resolved” because the issue is already being tracked in the bug reporting system and the user’s helpdesk request

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 18 of 56
---	--	---

should be accommodated. This workflow eliminates the need for ticket to go to “On Hold”. Users can then track the progress of the ticket off the “known issues” page or re-open the ticket if they don’t see their issue reported.

- e. Ticket resolutions that are likely to be of interest to other users and are not already in the Knowledgebase should be added to the Knowledgebase (as a “Draft”) by the USS when they resolve the ticket. Information that could identify the ticket submitter or could be considered proprietary (such as target coordinates) should be removed from the article prior to publication in the KB (Section 9). This draft article will then be submitted for publication after it has been given the appropriate review.

Action item for all (including SciOps Integrated Product Team [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. If the subsystem scientist changes the URL of the page, please inform the helpdesk. Because the subsystem scientist 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 Knowledgebase articles of the issues.

5.1 Ethics in USS Support


Given the nature of support provided by the helpdesk system, it is possible that an extensive amount of correspondence between the USS and user may be required to resolve a particular helpdesk issue. It is not ethical for a USS to ask to take part in a project in exchange for the additional help offered through the helpdesk. In other words, USS should not try to become collaborators on projects using the helpdesk.

If the ALMA user asks the USS to take part in the project given the expertise they have provided, the USS may join the project. The request from the ALMA user that the USS join the project must be captured in the helpdesk.

If there is any question as to the ethical nature of the user’s request for a USS to join the project, the USS should discuss the issue with either the Helpdesk or ARC manager before making a decision.

5.2 Management

The Helpdesk manager at each ARC is responsible for ensuring that the agreed to service expectations are met, and for scheduling triage personnel to ensure service coverage. He/she is also responsible for providing reports to the ARC management on Helpdesk

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 19 of 56
---	--	---

usage and statistics on the response times and distribution of tickets by status (“Open”, “Pending”, “Resolved”, “Closed”).

6 Procedures for Responding to tickets – Triage

By default, as described in setting up the alerts in section 7.3, Triage personnel at the ARC will receive email notification that:

- a new ticket has been received
- a ticket has been assigned from another ARC, or
- a ticket has been returned to triage


NOTE: If in your role as Triage, you do NOT get an email notification; your alerts may not have been set up properly or may have returned to their default values. In this case, refer to section 7.3 on what alerts should be set up for a triage staff member.

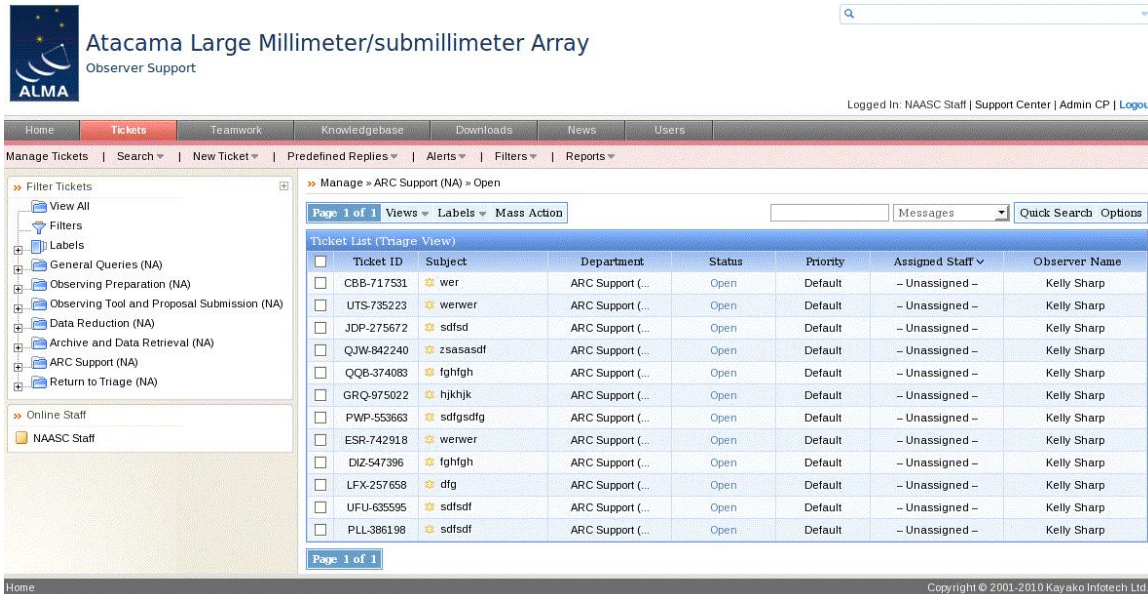
The on-duty triage USS will then login to the helpdesk (Section 7.1) view tickets to find the ticket in question (Section 7.4.1) (or click on the “new tickets since last login” link on the dashboard).

6.1 Examining a Ticket

Once the USS has located the ticket they wish to work on, clicking on the ticket ID or Subject will open the ticket (Figure 2). Tickets opened in this window may have a number of actions performed, including assignment, change of status and posting a reply.



	<p>ALMA Science Operations</p> <p>ALMA Helpdesk</p>	<p>Doc: HelpdeskStaffManual_v2.6_ALMA.docx</p> <p>Date: 2012-07-23</p> <p>Status: Draft</p> <p>Page: 20 of 56</p>
---	---	---



Atacama Large Millimeter/submillimeter Array
Observer Support

Logged In: NAASC Staff | Support Center | Admin CP | [Logout](#)

Home Tickets Teamwork Knowledgebase Downloads News Users

Manage Tickets | Search | New Ticket | Predefined Replies | Alerts | Filters | Reports

Filter Tickets

View All
Filters
Labels
General Queries (NA)
Observing Preparation (NA)
Observing Tool and Proposal Submission (NA)
Data Reduction (NA)
Archive and Data Retrieval (NA)
ARC Support (NA)
Return to Triage (NA)

Online Staff
NAASC Staff

Manage > ARC Support (NA) > Open

Page 1 of 1 Views Labels Mass Action

Ticket List (Triage View)

Ticket ID	Subject	Department	Status	Priority	Assigned Staff	Observer Name
<input type="checkbox"/> CBB-717531	wer	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> UTS-735223	wenwer	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> JDP-275672	sdfsd	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> QJW-842240	zsasasdf	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> QQB-374083	fghfgh	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> GRQ-975022	hjhkhj	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> PWP-553663	sdfgsdfg	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> ESR-742918	wenwer	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> DIZ-547396	fghfgh	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> LFX-257658	dfg	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> UFU-635595	sdfsd	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp
<input type="checkbox"/> PLL-386198	sdfsd	ARC Support (...)	Open	Default	- Unassigned -	Kelly Sharp


Page 1 of 1

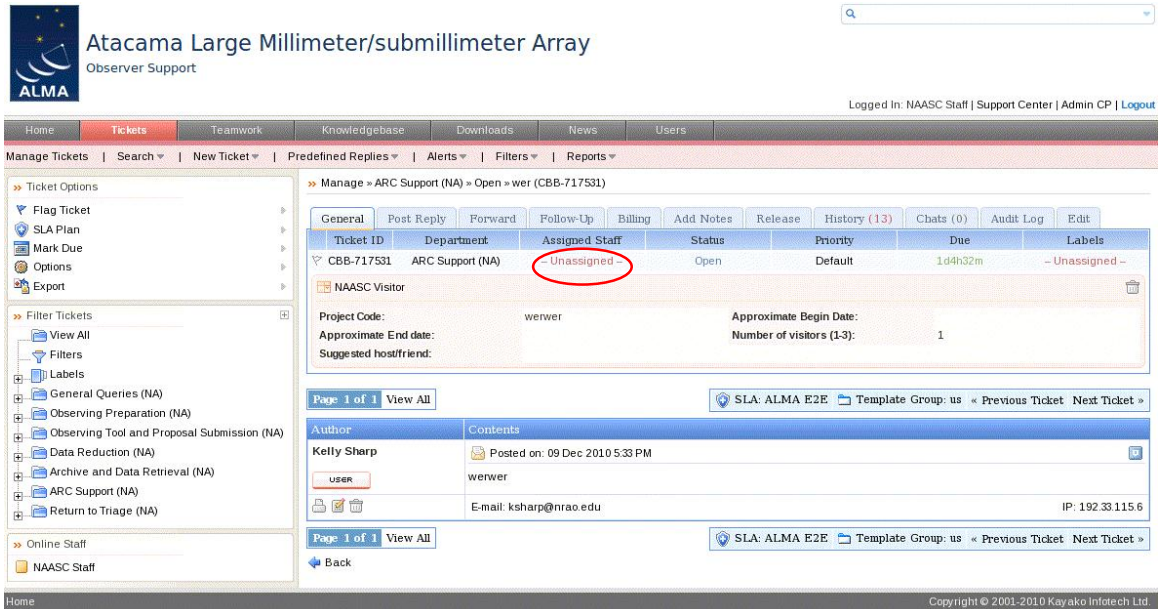
Home Copyright © 2001-2010 Kayako Infotech Ltd.

Figure 2: Selecting a Ticket. Click on either the ticket ID or Subject to open a ticket.

6.1.1 Assigning a Ticket

If Triage believes this ticket requires USS expertise, they will assign the ticket to the appropriate USS. The “General” tab allows (re)assignment of a ticket through clicking on “-Unassigned-” in the “Assigned Staff” field in the ticket header (Figures 3 and 4).

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 21 of 56
---	--	---



Atacama Large Millimeter/submillimeter Array
Observer Support

Logged In: NAASC Staff | Support Center | Admin CP | Logout

Home Tickets Teamwork Knowledgebase Downloads News Users

Manage Tickets | Search | New Ticket | Predefined Replies | Alerts | Filters | Reports

Ticket Options: Flag Ticket, SLA Plan, Mark Due, Options, Export

Filter Tickets: View All, Filters, Labels, General Queries (NA), Observing Preparation (NA), Observing Tool and Proposal Submission (NA), Data Reduction (NA), Archive and Data Retrieval (NA), ARC Support (NA), Return to Triage (NA)

Online Staff: NAASC Staff

Manage » ARC Support (NA) » Open » wer (CBB-717531)

Ticket ID	Department	Assigned Staff	Status	Priority	Due	Labels
CBB-717531	ARC Support (NA)	- Unassigned -	Open	Default	1d4h32m	- Unassigned -

Project Code: werwer
Approximate End date:
Suggested host/friend:

Approximate Begin Date:
Number of visitors (1-3): 1

Page 1 of 1 View All

SLA: ALMA E2E Template Group: us « Previous Ticket Next Ticket »

Author: Kelly Sharp
Contents: Posted on: 09 Dec 2010 5:33 PM
werwer
E-mail: ksharp@nrao.edu
IP: 192.33.115.6

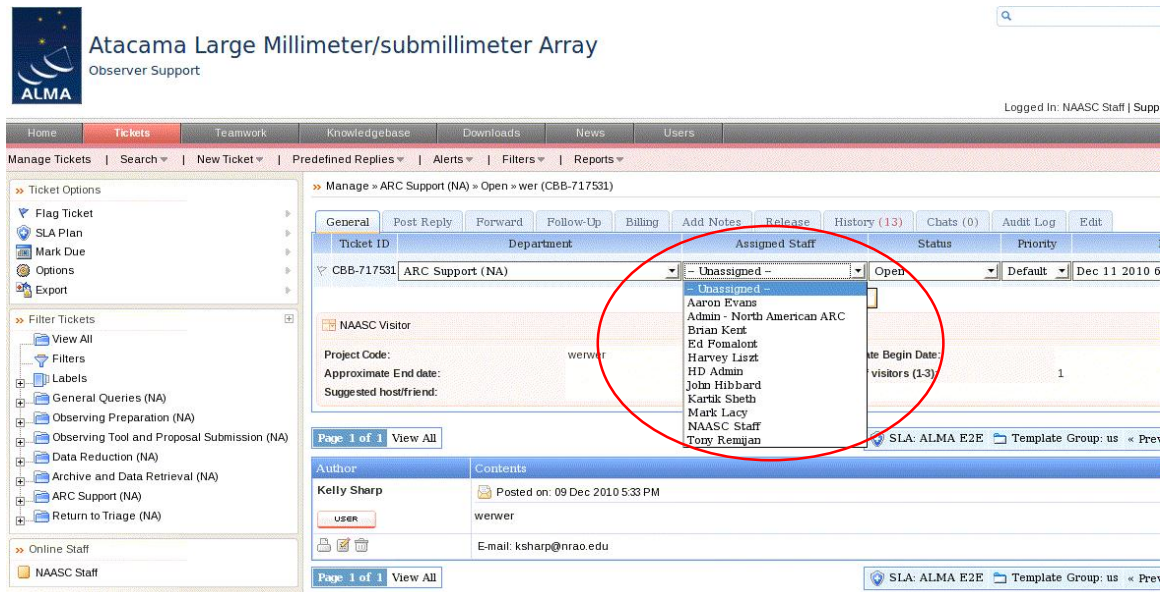
Page 1 of 1 View All

SLA: ALMA E2E Template Group: us « Previous Ticket Next Ticket »

Back

Home Copyright © 2001-2010 Kayako Infotech Ltd.

Figure 3: The “General” tab after a ticket has been opened. Click on -Unassigned- to (re)assign that ticket to a USS



Atacama Large Millimeter/submillimeter Array
Observer Support

Logged In: NAASC Staff | Support Center | Admin CP | Logout

Home Tickets Teamwork Knowledgebase Downloads News Users

Manage Tickets | Search | New Ticket | Predefined Replies | Alerts | Filters | Reports

Ticket Options: Flag Ticket, SLA Plan, Mark Due, Options, Export

Filter Tickets: View All, Filters, Labels, General Queries (NA), Observing Preparation (NA), Observing Tool and Proposal Submission (NA), Data Reduction (NA), Archive and Data Retrieval (NA), ARC Support (NA), Return to Triage (NA)

Online Staff: NAASC Staff

Manage » ARC Support (NA) » Open » wer (CBB-717531)

Ticket ID	Department	Assigned Staff	Status	Priority	Due	Labels
CBB-717531	ARC Support (NA)	- Unassigned -	Open	Default	Dec 11 2010 6	

Project Code: werwer
Approximate End date:
Suggested host/friend:

Approximate Begin Date:
visitors (1-3): 1

Page 1 of 1 View All

SLA: ALMA E2E Template Group: us « Previous Ticket Next Ticket »

Author: Kelly Sharp
Contents: Posted on: 09 Dec 2010 5:33 PM
werwer
E-mail: ksharp@nrao.edu


Page 1 of 1 View All

SLA: ALMA E2E Template Group: us « Previous Ticket Next Ticket »

Back

Home Copyright © 2001-2010 Kayako Infotech Ltd.

Figure 4: View after -Unassigned- has been selected. Triage can now select an owner for that ticket.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 22 of 56
---	--	---

NOTE: While it is possible for a USS to reassign a ticket to another USS, this is not the recommended workflow (See Section 8) and should be avoided.

6.1.2 Posting a Reply to a Ticket

If Triage believes they can answer the ticket or requests more input from the user or a USS, the “Post Reply” tab allows a reply to be made to the ticket. In this case, Triage should assign the ticket to himself or herself before posting a reply or requesting more information from the user. In addition to the large text box where a reply can be written (Figure 5), there are also options to place pre-defined replies or knowledgebase articles into the reply by clicking on the “+Predefined Reply” or “+Knowledgebase” menus above the reply box (Figure 5). Hit “Send” to send the reply to the user.

If you want to capture the resolution of the ticket into the knowledgebase, check the “+Knowledgebase” box to the lower right before hitting “Send” (Section 6.5).

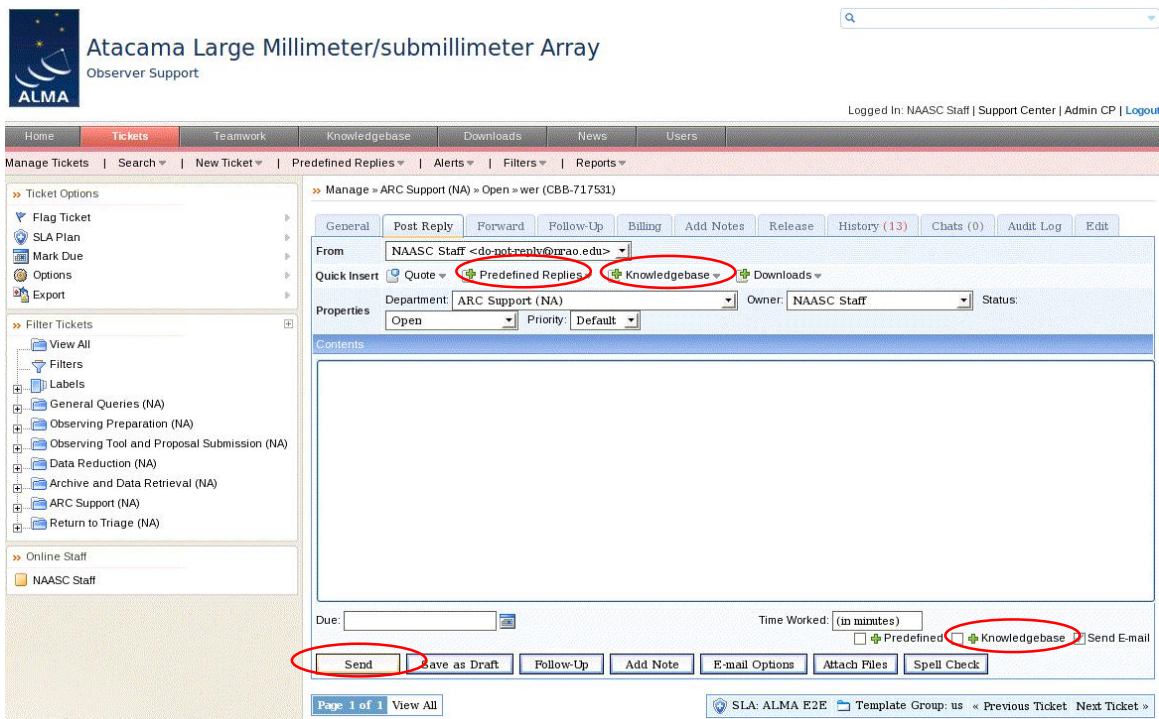



Figure 5: The “Post Reply” tab view. A USS can either select from a predefined set of replies or knowledgebase articles. In addition, it is possible to capture the reply to the KB by selecting the “+Knowledgebase” checkbox.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 23 of 56
---	--	---

The user will receive an email that contains both a link to the ticket as well as the resolution submitted in the text of the email. It is also necessary that the USS change the status of ticket to “Resolved” (Section 6.1.3).


It is possible by changing the views, that a USS can see tickets that they have not been assigned. It is left to each ARC to decide whether or not a USS can reply to a ticket that has not been assigned them. Under all circumstances, a USS should feel free to add notes to a ticket that can be either viewed by everyone or a particular USS (Section 6.3).

In addition, it is also possible that triage may receive a reply from a user that is not directed to the response posted by the USS assigned to their ticket, (e.g. asking a new question) (Section 2.1). In this case, triage should post the contents from the user in a note attached to the ticket and in the future try to discourage this correspondence, for example, by suggesting that they open a new ticket. The formal workflow for these types of tickets though is managed by the individual ARCs (see ARC specific staff guide).

6.1.3 Changing the Status of a Ticket

All USS should remember to change the status of a ticket as necessary after posting a reply.

In addition, the status should be based on the action required/needed for that ticket (Section 2.3). To do this, hit the “General” tab, click on the status of the ticket and use the pull-down menu to select the new status OR change the status of the ticket while posting a reply in the “Post Reply” tab (Figures 6 & 7). **REMEMBER, a USS should not close a ticket (Section 2.3.5).**

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 24 of 56
---	--	---

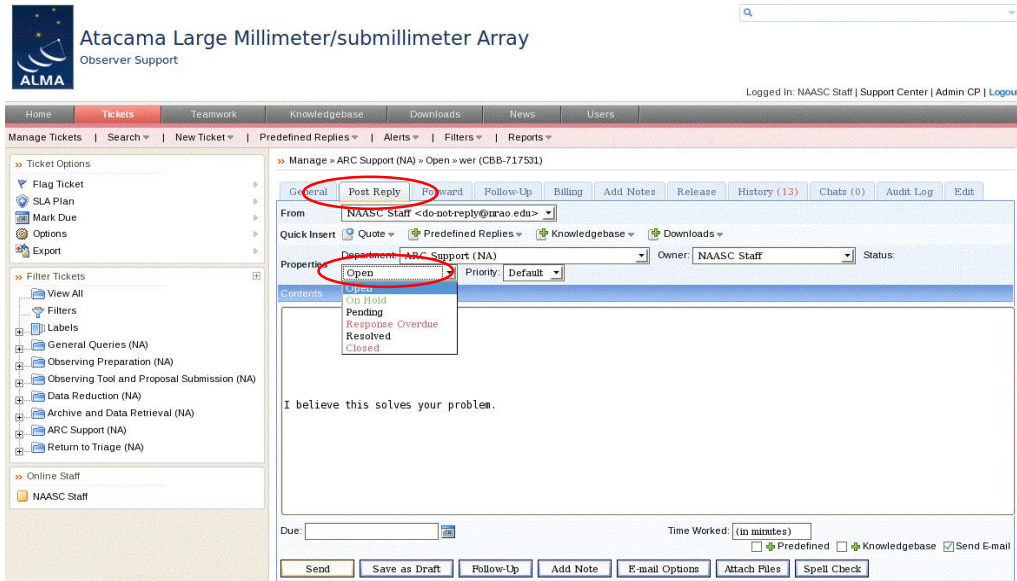


Figure 6: Changing the status of a ticket inside the “Post Reply” tab.

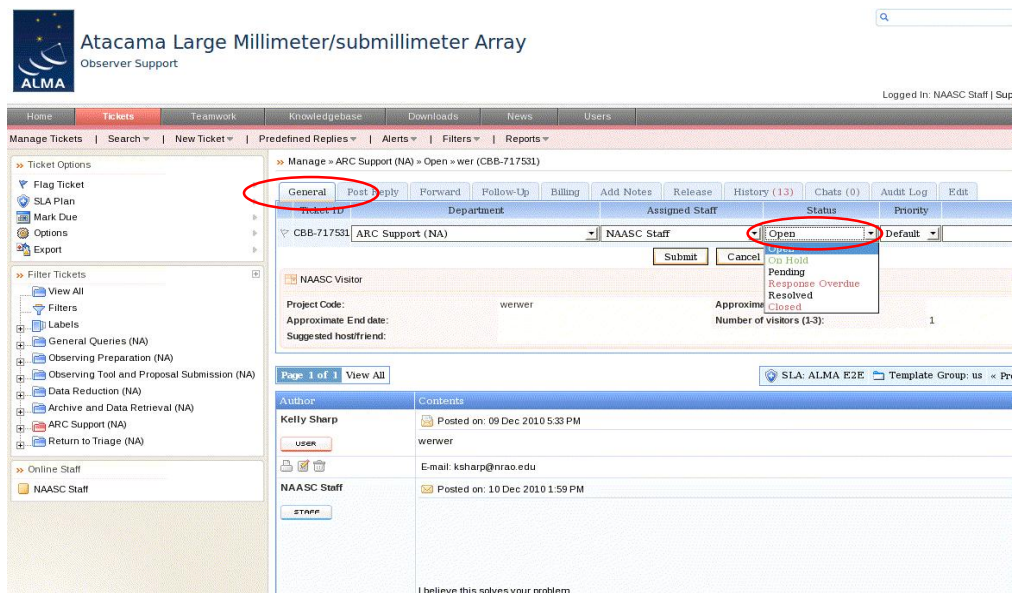



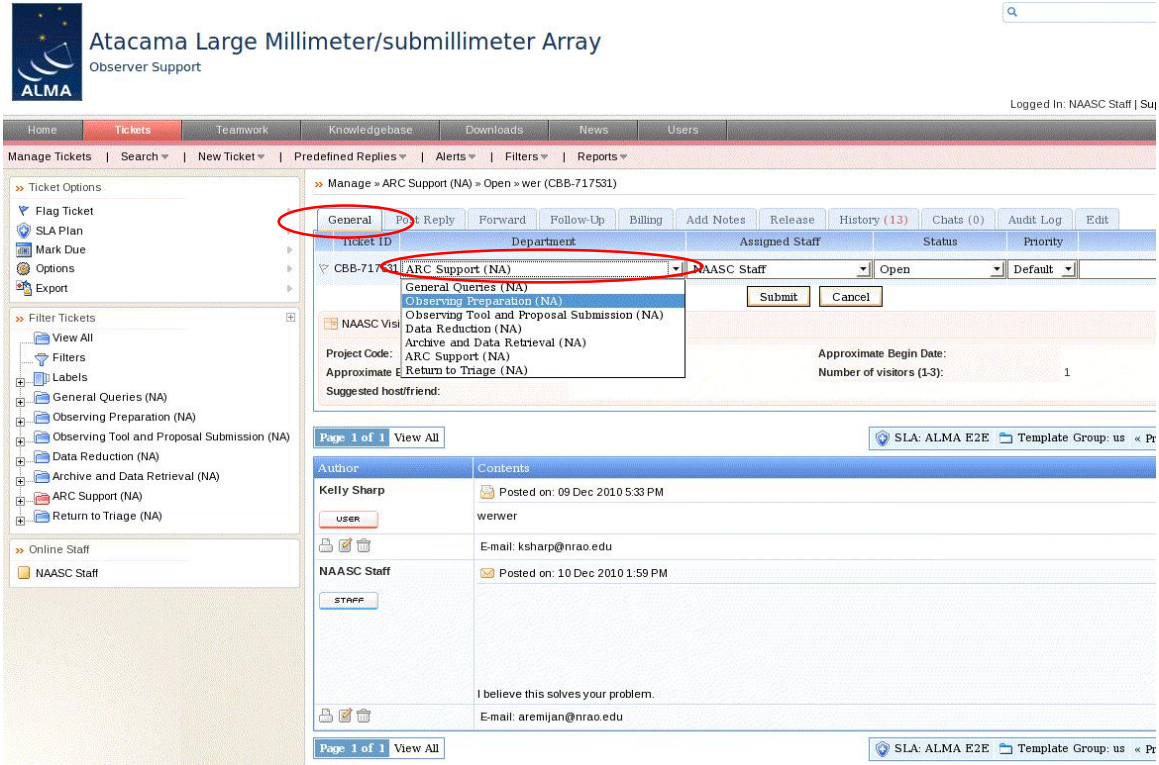
Figure 7: Changing the status of a ticket inside the “General” tab.

6.2 Changing the Department of a Ticket

Occasionally a USS will need to change the department of a ticket. For example, an EU or EA user may submit a ticket to visit the NA ARC. In this case, the workflow should be that a user who wants to visit a non-regional ARC submits a ticket to their region to

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 25 of 56
---	--	---

the Face-to-Face Support department and then triage will change the department of that ticket to the appropriate ARC's triage. Clicking on the "General" tab allows the department of a ticket to be changed through clicking on the Department field in the ticket header (Figure 8).




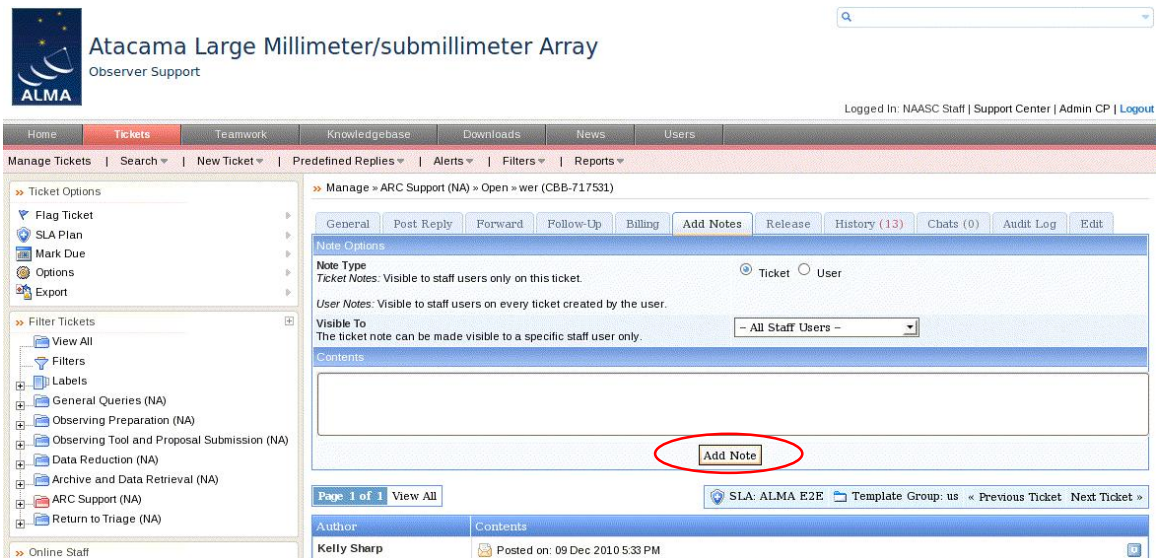
The screenshot shows the ALMA Helpdesk interface. The top navigation bar includes links for Home, Tickets, Teamwork, Knowledgebase, Downloads, News, and Users. The 'Tickets' tab is active. On the left, there's a sidebar with 'Ticket Options' (Flag Ticket, SLA Plan, Mark Due, Options, Export) and 'Filter Tickets' (View All, Filters, Labels, General Queries (NA), Observing Preparation (NA), Observing Tool and Proposal Submission (NA), Data Reduction (NA), Archive and Data Retrieval (NA), ARC Support (NA), Return to Triage (NA)). The main content area shows a ticket for 'CBB-717631' with the 'General' tab selected. The 'Department' dropdown menu is open, showing options like 'ARC Support (NA)', 'General Queries (NA)', 'Observing Preparation (NA)', 'Observing Tool and Proposal Submission (NA)', 'Data Reduction (NA)', 'Archive and Data Retrieval (NA)', 'ARC Support (NA)', and 'Return to Triage (NA)'. The 'General' tab is highlighted with a red circle. The ticket details include 'Assigned Staff: NAASC Staff', 'Status: Open', and 'Priority: Default'. The ticket header also shows 'Ticket ID: CBB-717631', 'Department: ARC Support (NA)', 'Assigned Staff: NAASC Staff', 'Status: Open', and 'Priority: Default'. The ticket body shows a message from 'Kelly Sharp' dated '09 Dec 2010 5:33 PM' and a response from 'NAASC Staff' dated '10 Dec 2010 1:59 PM'.

Figure 8: Changing the Department of a ticket inside the “General” tab.

6.3 Adding Notes to a Ticket

Tickets may be annotated by a USS without these notes being visible to the user. Notes can be applied on a per-ticket basis (for example, to request the Triage USS to transfer to another ARC), or on a User basis (for example, to inform USS about issues with a particular user, e.g. a poor internet connection). The USS can also control whether the note is visible to all USS, or only a specific USS (for example, the helpdesk manager). To add a note to a ticket, select the ticket and click the “Add Notes” tab above the ticket header (Figure 9).

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 26 of 56
---	--	---




The screenshot shows the ALMA Helpdesk web interface. The top navigation bar includes links for Home, Tickets, Teamwork, Knowledgebase, Downloads, News, and Users. The 'Tickets' tab is active. On the left, there's a sidebar with 'Ticket Options' (Flag Ticket, SLA Plan, Mark Due, Options, Export) and 'Filter Tickets' (View All, Filters, Labels, General Queries (NA), Observing Preparation (NA), Observing Tool and Proposal Submission (NA), Data Reduction (NA), Archive and Data Retrieval (NA), ARC Support (NA), Return to Triage (NA)). The main content area shows a ticket management interface for 'Manage > ARC Support (NA) > Open > wer (CBB-717531)'. The 'Add Notes' tab is selected, displaying fields for 'Note Type' (Ticket/User), 'Ticket Notes' (visible to staff), 'User Notes' (visible to staff on every ticket), and 'Visible To' (a dropdown menu currently set to '- All Staff Users -'). A red circle highlights the 'Add Note' button at the bottom of the 'Contents' field. The bottom status bar shows 'Page 1 of 1', 'View All', 'SLA: ALMA E2E', 'Template Group: us', and navigation links for 'Previous Ticket' and 'Next Ticket'.

Figure 9: Adding a note to a ticket inside the “Add Notes” tab.

6.4 Forwarding Tickets

Sometimes it is useful to be able to forward a ticket via email out of the Kayako system, for example, to solicit the help of an expert who does not have a Kayako account. To do this:

- click on the ticket subject and hit “Forward”
- Enter the email address of the intended recipient.
- The USS will probably also want to change their email address from the “do-not-reply” default to their actual address, which can be achieved by selecting their address on the pull-down menu on the “From” line.
- To place the body of the ticket in the email, plus any subsequent correspondence, click “Quote” and select “Quote all posts”.
- The USS can then add any of his or her own comments and then hit “Send” to forward the ticket (Figure 10).

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 27 of 56
---	--	---

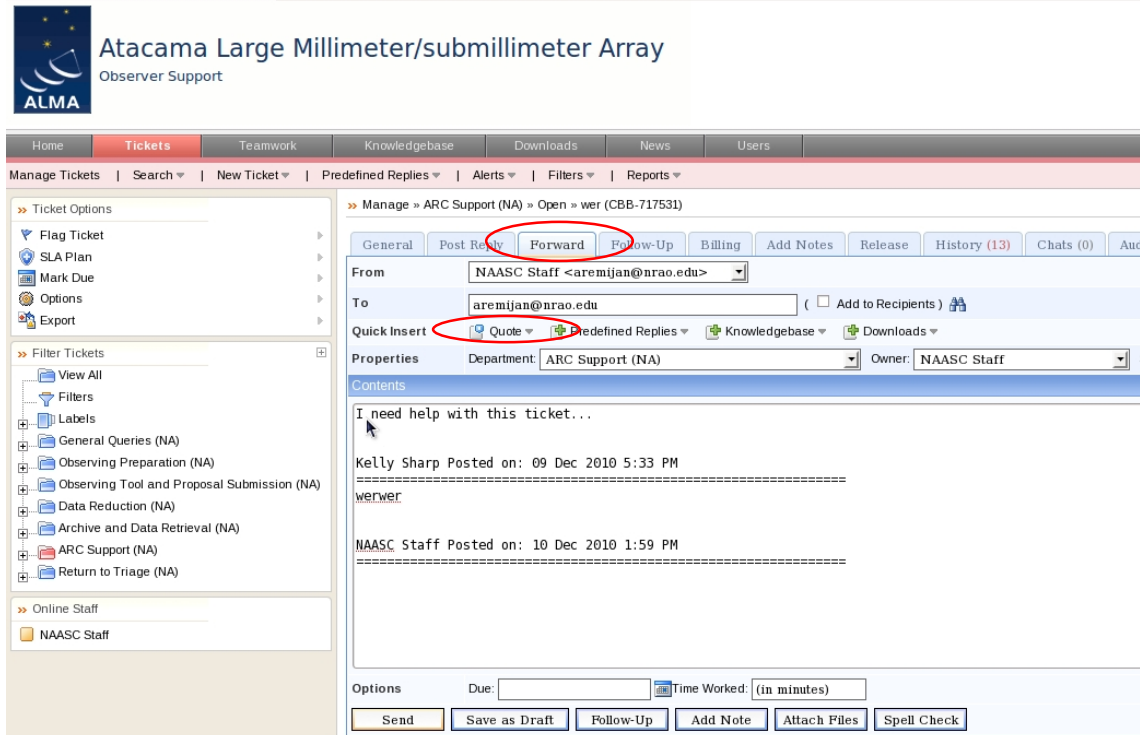



Figure 10: Forwarding a ticket to a user without a Kayako account inside the “Forward” tab.

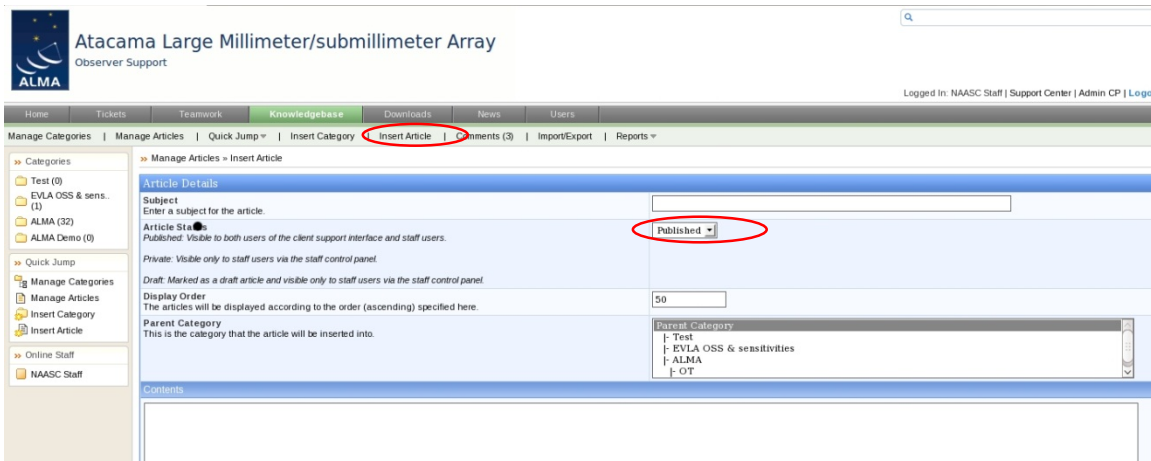
6.5 Adding a Knowledgebase Article

If the resolution of a ticket is likely to be of general interest to the ALMA community, a knowledgebase article should be filed (Section 5, item 6e). To do this, check the “+Knowledgebase” box to the lower right of the reply box (Section 6.1.2) before sending the reply to the user. This will take the USS to the Knowledgebase article editor directly, with the body of the ticket reply included. The article should be edited to remove any information that would identify the user, and should not include any information that the user might consider proprietary (e.g. specific astronomical sources). The subject and category of the article should also be entered before the article is inserted and before submission.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 28 of 56
---	--	---

The USS should set the “Article Status” to DRAFT (Figure 11). Designated representatives from each ARC will then review the draft KB articles before they are published.

A knowledgebase article may also be added independently of the ticket reply by hitting the “Knowledgebase” tab on the top row of tabs, then “Insert Article” on the second row. For more specifics on displaying the content of Knowledgebase articles, refer to Section 9.



Atacama Large Millimeter/submillimeter Array
Observer Support

Logged In: NAASC Staff | Support Center | Admin CP | Logout

Home | Tickets | Teamwork | **Knowledgebase** | Downloads | News | Users

Manage Categories | Manage Articles | Quick Jump | Insert Category | **Insert Article** | Comments (3) | Import/Export | Reports

» Manage Articles » Insert Article

Article Details

Subject:

Article Status: **Published**

Published: Visible to both users of the client support interface and staff users.

Private: Visible only to staff users via the staff control panel.

Draft: Marked as a draft article and visible only to staff users via the staff control panel.

Display Order:


The articles will be displayed according to the order (ascending) specified here.

Parent Category:

This is the category that the article will be inserted into.

Contents:

Figure 11: Adding a Knowledgebase article. The above view will be the same if you enter through the “Post Reply” tab and select the “+Knowledgebase” option.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 29 of 56
---	--	---

6.6 Summary of Triage Workflow

In summary, the appropriate workflow for a Triage USS is the following:

1. Determine whether the ticket has been filed under the correct department and if not, change the department (Section 6.2).
2. Determine whether you are capable of resolving the ticket without further help from another USS or further input from the user. If so, assign the ticket to yourself (Section 6.1.1), respond to the user (Section 6.1.2) and change the ticket status to “Resolved” (Section 6.1.3). File a knowledgebase article if appropriate (Section 6.5).
3. If the ticket requires further information from the user (for example, operating system details), triage should assign the ticket to himself or herself, and send a response to the user requesting more details. The ticket status should be set to “Pending” while waiting for the reply from the user.
4. If triage does not believe they can resolve the ticket or to properly distribute the workflow among the support staff across the ARC, the ticket should be assigned to a USS. Triage should also assign tickets that report bug or enhancement requests to the cognizant lead or a certified USS for that software subsystem.
5. If the ticket is best suited to a Department belonging to another ARC (Section 4), or if the ticket is returned to triage by the USS with a note (Section 6.3) requesting that the ticket be sent to another ARC, triage USS should set the department to “Transfer to ...” and send a reply to the user stating that the ticket is being forwarded to the new ARC in question. However, recall that the goal is to “transfer knowledge and not tickets”, so the transfer of tickets between ARCs should be done sparingly and be contained to only tickets that require specialized expertise from a particular USS from another ARC (Section 2.2.2).


7 Staff interface details

7.1 Staff view: logging in


To login and access tickets as a staff member, staff should visit the following site:

<https://help.almascience.org/staff>

and login with their staff account provided to them by their local helpdesk administrator (Section 2.1). The login window for staff is shown in Figure 12. Upon login, staff will be

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 30 of 56
---	--	---

directed to the helpdesk staff dashboard appropriate for their parent ARC. This will show the departments of which the staff is a member, and notifications of new, updated and overdue tickets (see Figure 13).



Atacama Large Millimeter/submillimeter Array

Observer Support

3.70.01
09 Nov 2010

Username:


Password:

Remember Me: ☒ Yes ☐ No

Logged out successfully

Powered by SupportSuite
Copyright © 2001-2010 Kayako Infotech Ltd.

Figure 12: The staff login view



Atacama Large Millimeter/submillimeter Array

Observer Support

[Search](#)

Logged In: NAASC Staff | [Support Center](#) | [Admin CP](#) | [Logout](#)

[Home](#) | [Tickets](#) | [Teamwork](#) | [Knowledgebase](#) | [Downloads](#) | [News](#) | [Users](#)

Dashboard | [Preferences](#) | [Private Messages](#)

Quick Insert

- Ticket
- Contact
- Event
- Task
- Article
- File
- News
- User

Filter Tickets

- [View All](#)
- [Filters](#)
- [Labels](#)
- [General Queries \(NA\)](#)
- [Observing Preparation \(NA\)](#)
- [Observing Tool and Proposal Submission \(NA\)](#)
- [Data Reduction \(NA\)](#)
- [Archive and Data Retrieval \(NA\)](#)
- [ARC Support \(NA\)](#)
- [Return to Image \(NA\)](#)

Online Staff

- NAASC Staff

Statistics

- New tickets since last login: 3
- Tickets updated since last login: 3
- New chats since last login: 0

Today News (1)

Friday, 10 December 2010

08:00
09:00
10:00
11:00
12:00
13:00
14:00
15:00
16:00
17:00
18:00
19:00

Day Work Week Week Month

Home Copyright © 2001-2010 Kayako Infotech Ltd.


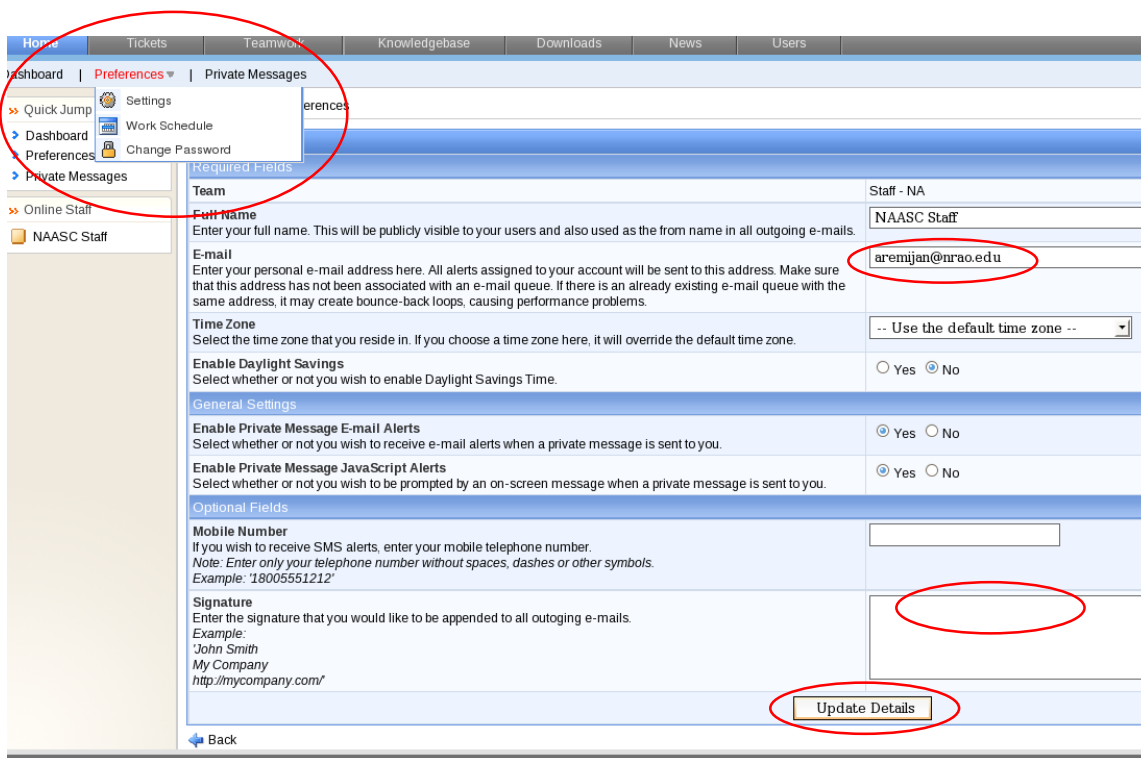
	<p>ALMA Science Operations</p> <p>ALMA Helpdesk</p>	<p>Doc: HelpdeskStaffManual_v2.6_ALMA.docx</p> <p>Date: 2012-07-23</p> <p>Status: Draft</p> <p>Page: 31 of 56</p>
---	---	---

Figure 13: Default dashboard view under the “Home” tab showing all departments associated with that ARC and recent helpdesk activity.

7.2 “Home” Tab

The view under the “Home” tab is illustrated in Figure 13. In the staff view, you can see all the departments in that ARC (bottom left) as well as the status of any new tickets or updates to resolved tickets (middle). From this tab, staff may also use the “Preferences” menu to control settings, set their calendar view(s) and change their password. For example to change your notification email, follow: **Home -> Preferences -> Settings -> <change email address> -> Update Details** (Figure 14).




The screenshot shows the ALMA Helpdesk staff interface. The top navigation bar includes 'Home', 'Tickets', 'Teamwork', 'Knowledgebase', 'Downloads', 'News', and 'Users'. The left sidebar has a 'Preferences' menu with options like 'Quick Jump', 'Dashboard', 'Private Messages', 'Online Staff', and 'NAASC Staff'. The main content area displays the 'Settings' form. The 'E-mail' field is circled in red, showing the email address 'aremijan@nrao.edu'. The 'Update Details' button is also circled in red.

Figure 14: Changing your notification email address

7.3 Alerts

An alert is sent as an email (or Short Message Service - SMS) so a staff member gets notified of changes in a ticket status or if a new ticket has been submitted and assigned to them. By default, a staff account is set up by the helpdesk administrator to receive email

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 32 of 56
---	--	---

alerts as specified by their helpdesk role. (triage, USS, or manager). Figure 15 shows the Alert Events that can be selected.

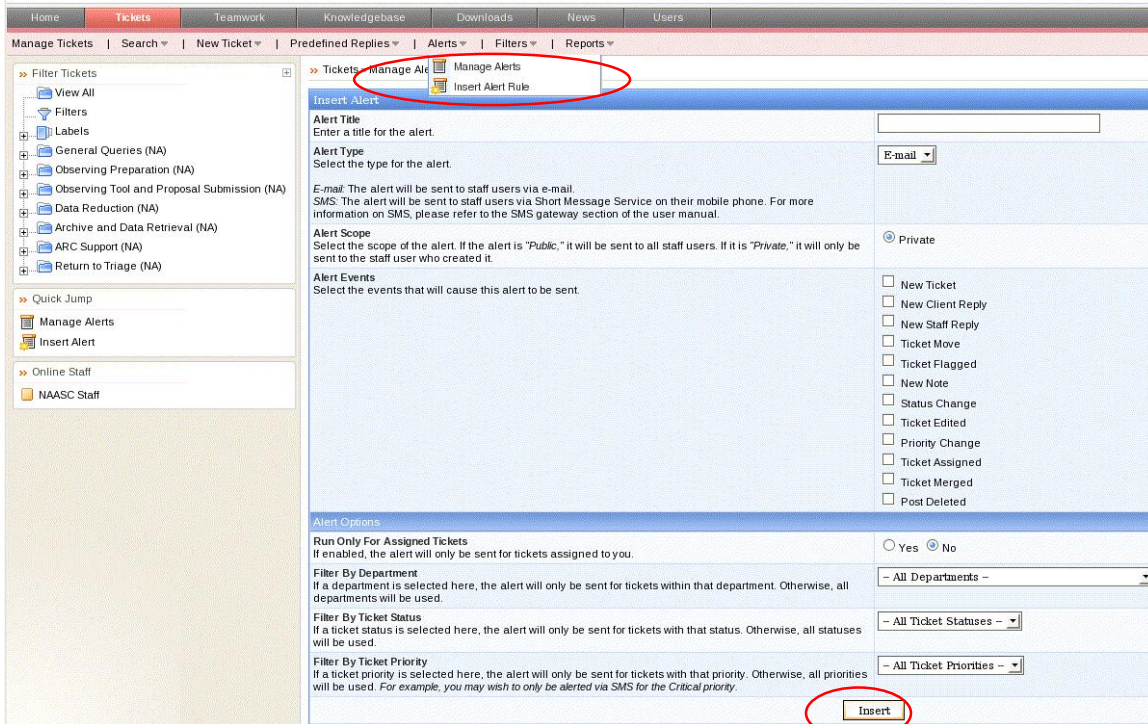


Figure 15. Alert events that can be set up by a user via email or SMS notification.


To set up an alert, login to the helpdesk (Section 7.1) and hit the “Tickets” tab on the top row of tabs, then the “Alerts” tab on the second row down, and select “Manage Alerts” from the drop-down menu to see which alerts are currently set up. To set up new alerts, hit the “Alerts” tab and select “Insert Alert Rule” (see Figure 15). To finish inserting the rule hit the “Insert” button at the bottom of the page.

The default email alerts for the following roles should be:

USS:

- New Client Reply
- New Note
- Status Change
- Ticket Assigned

Triage:

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 33 of 56
---	--	---

- New Ticket
- New Client Reply
- Ticket Move – will get notification if the ticket is transferred, moved or returned to triage
- New Note
- Status change – will get notification if the response is overdue
- Ticket Assigned

Manager:

- Same as triage but add Ticket Closed.

In general, for the USS, the alert options should be set to run only for those tickets assigned to the USS, for all departments, all ticket statuses and all ticket priorities (See “Alert Options” in Figure 15). Also note that changes made by you to a ticket will not activate an alert. Alerts are only activated for ticket changes not made by you.

For Triage, the alert options for Ticket Assigned, New Client Reply and New Note should be set only to run for those tickets already assigned to Triage, for all departments, all ticket statuses and all ticket priorities. However, for New Tickets, Ticket Move and Status Change, the Triage should view all tickets, not just those assigned. That is, “Run Only for Assigned Tickets” should be “No” in the Alert Options menu (Figure 15). Finally, the manager should track all tickets so the “Run Only for Assigned Tickets” alert option should be set to “No” for the manager for all ticket alerts.

7.4 “Tickets” Tab

Under the “Tickets” tab are the options for servicing tickets, including viewing them, and setting up alerts (section 7.3) and filters.


7.4.1 Viewing Tickets

To view tickets: **Tickets -> Manage Tickets -> Views.**

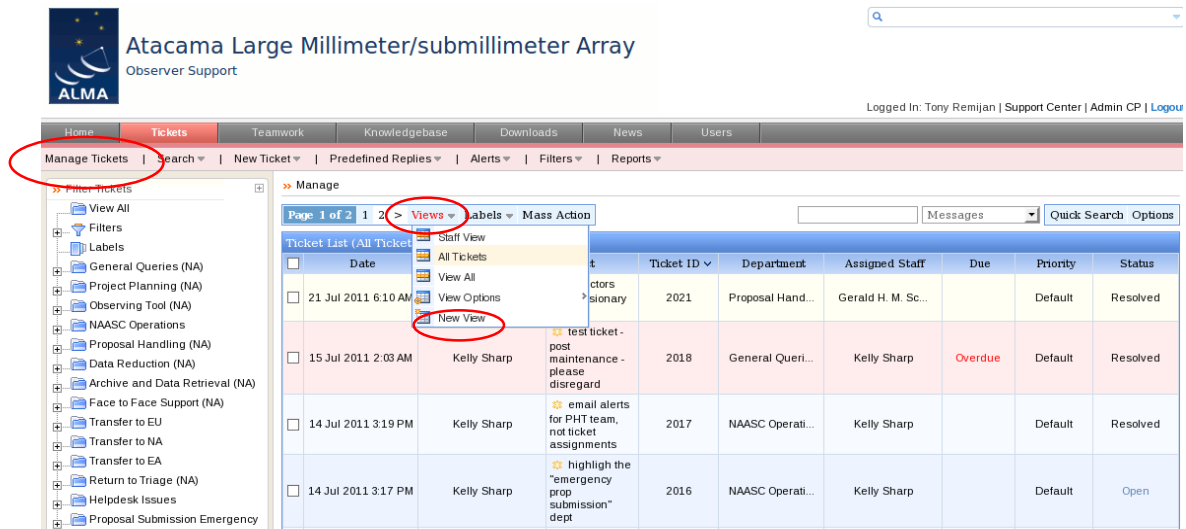
From “Views” a staff member may choose from one of the pre-defined “public” views (Figure 16), or define their own “private” view. By default, there are a limited number of public views that have been set up for USS. The “Default View” shows all “Open” tickets assigned to the staff member; the “Staff” view shows only those tickets that are assigned to the staff member. A USS has the ability to set up any number of “private” views including viewing “Closed” tickets. As a rule, “public” views should not be edited except by the helpdesk administrator.

To create a new private view: **Tickets -> Manage Tickets -> Views -> New View**

Once a list of tickets is shown, clicking on either the ticket ID or the subject will allow the ticket text to be viewed.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 34 of 56
---	--	---

It is also important to follow the “department breadcrumbs” when viewing tickets (Figure 17). If you are in a helpdesk department and change your view, it will display that view for that department **ONLY**. Therefore, if you are actively searching for a ticket using views, it is best to return to “View All” tickets to test that view.



Atacama Large Millimeter/submillimeter Array
Observer Support

Logged In: Tony Remijan | Support Center | Admin CP | [Logout](#)

Home Tickets Teamwork Knowledgebase Downloads News Users

Manage Tickets Search New Ticket Predefined Replies Alerts Filters Reports

Filter Tickets

View All
Filters
Labels
General Queries (NA)
Project Planning (NA)
Observing Tool (NA)
NAASC Operations
Proposal Handling (NA)
Data Reduction (NA)
Archive and Data Retrieval (NA)
Face to Face Support (NA)
Transfer to EU
Transfer to NA
Transfer to EA
Return to Triage (NA)
Helpdesk Issues
Proposal Submission Emergency

Manage


Page 1 of 2 1 2 > Views Labels Mass Action


Ticket List (All Tickets)

	Date	Assigned Staff	Ticket ID	Department	Assigned Staff	Due	Priority	Status
<input type="checkbox"/>	21 Jul 2011 6:10 AM		2021	Proposal Hand...	Gerald H. M. Sc...		Default	Resolved
<input type="checkbox"/>	15 Jul 2011 2:03 AM	Kelly Sharp	2018	General Quer...	Kelly Sharp	Overdue	Default	Resolved
<input type="checkbox"/>	14 Jul 2011 3:19 PM	Kelly Sharp	2017	NAASC Operati...	Kelly Sharp		Default	Resolved
<input type="checkbox"/>	14 Jul 2011 3:17 PM	Kelly Sharp	2016	NAASC Operati...	Kelly Sharp		Default	Open

Views dropdown menu options: Staff View, All Tickets, View All, View Options, New View

Figure 16: Selecting a view – USS can create new private views but should avoid editing the public views.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 35 of 56
---	--	---



Atacama Large Millimeter/submillimeter Array
Observer Support

Home	Tickets	Teamwork	Knowledgebase	Downloads	News	Users
------	----------------	----------	---------------	-----------	------	-------

Manage Tickets | Search ▼ | New Ticket ▼ | Predefined Replies ▼ | Alerts ▼ | Filters ▼ | Reports ▼

Filter Tickets

- View All
- Filters
- Labels
- General Queries (NA)
- Project Planning (NA)
- Observing Tool (NA)
- Data Reduction (NA)
- Archive and Data Retrieval (NA)
- Face to Face Support (NA)
- Transfer to EU
- Transfer to NA
- Transfer to EA
- Return to Triage (NA)
- Helpdesk Issues
- Proposal Submission Emergency

Online Staff
Tony Remijan

Manage > Face to Face Support (NA)

Page 1 of 1 Views Labels Mass Action

Ticket List (Triage View)


<input type="checkbox"/>	Ticket ID	Subject	Department	Status
--------------------------	-----------	---------	------------	--------

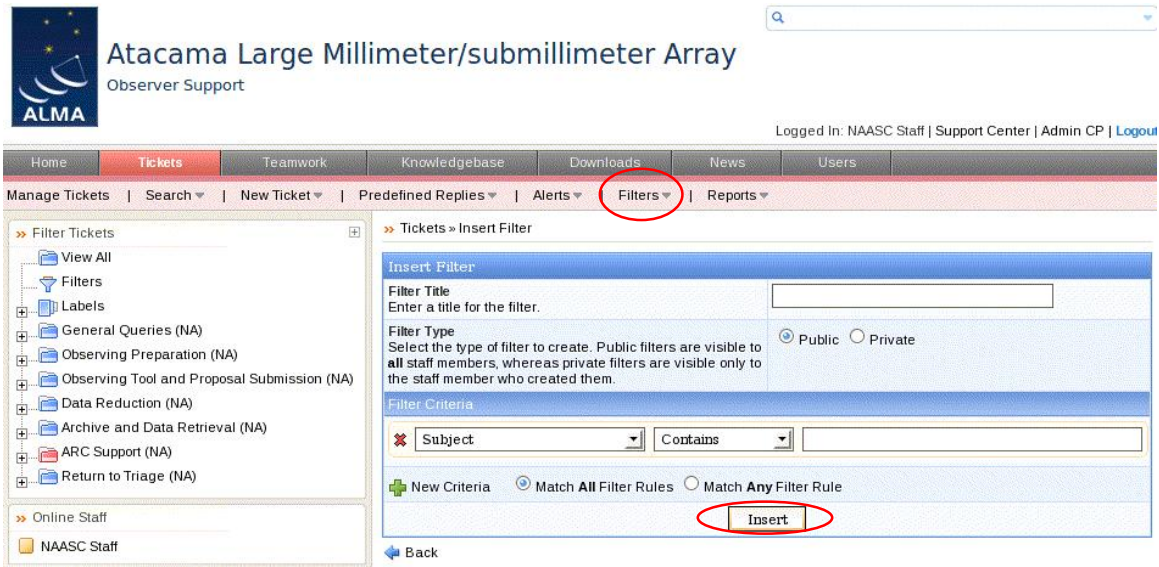
Page 1 of 1

Figure 17. Illustration of the Department “breadcrumbs”. If you are switching views, the view will only change for the department you are currently viewing.

7.4.2 Filters and Ticket Searches

On the left-hand side of the Kayako interface web page is an area headed “Filter tickets”. This allows the user to display tickets by department and status (Figure 18). In addition, under the “Tickets” tab is an option to search tickets via a quick or advanced search. Filters can be created publicly or privately. A private ticket filter is only accessible by the staff user who created it, meaning that staff members can create and manage their own ticket filters.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 36 of 56
---	--	---



The screenshot shows the ALMA Observer Support web interface. At the top, there's a search bar and navigation links like Home, Tickets, Teamwork, Knowledgebase, Downloads, News, and Users. The 'Filters' menu item is highlighted with a red circle. Below the navigation bar, the 'Insert Filter' dialog box is open. It contains a 'Filter Title' field, a 'Filter Type' section with 'Public' and 'Private' radio buttons, and a 'Filter Criteria' section with a dropdown menu set to 'Subject' and a 'Contains' operator. There are also radio buttons for 'Match All Filter Rules' and 'Match Any Filter Rule'. The 'Insert' button at the bottom right of the dialog is circled in red.

Figure 18: Managing and setting up a search filter.


7.4.2.1 User Created Filters

To add a filter: **Tickets -> Filters -> Insert Filter**. (Figure 18). Tickets can be filtered on many properties such as subject, status, owner, time since creation, last activity etc. In particular, a filter selecting “pending”, “on hold” or “closed” tickets can be useful as the “views” display only open tickets. The new filters appear on the left-hand “filter” area of the interface and may be applied simply by clicking on them. For more information about how to set up a specific filter using all the available logic inside the Kayako system, see pages 132-136 of the Kayako manual (Version 3.6, revision 13).

8 Procedure for Responding to Tickets – USS

By default, the USS will receive email notification of a ticket being assigned to them.
NOTE: If you do NOT get an email notification, your alerts may not have been set up properly or may have returned to their default values. In this case, refer to Section 6.3 on what alerts should be set up for a USS.

The USS will login to the helpdesk (Section 7.1) (or click on the “new tickets since last login” link on the dashboard), view the ticket (Section 7.4.1), examine it (Section 6.1), and take the following actions:


	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 37 of 56
---	--	---

1. Determine whether they are capable of resolving the ticket without further help from another ARC, or further input from the user. Respond to the user (Section 6.1.2) and change the ticket status to “resolved”. They should file a knowledgebase article if appropriate (Section 6.5).
2. If the ticket requires further information from the user (for example, operating system details), a response should be sent to the user requesting this, and the ticket status set to “Pending” while awaiting a reply (Section 6.1.3).
3. If the USS believes the ticket needs to be sent to another ARC (Section 4), they should change the department to “Return to Triage” (Section 6.2) and add a note to the ticket (Section 6.3) describing which ARC it should be sent to and why.
4. If the USS is unable to respond to the ticket (for example, because they lack the specialized knowledge to do so, or because they are unavailable) the ticket should be returned to Triage (Section 6.2) with a note explaining why it was not answered, and recommending assignment to another USS. This should only happen in exceptional circumstances. In general, a USS should always attempt to answer the ticket themselves, if necessary by asking appropriate experts (Section 5).
5. If the USS is the cognizant lead or has been certified by the cognizant lead for a particular software subsystem, they should follow the workflow described in Section 5 and change the ticket status to “Resolved” when an enhancement request or bug fix is submitted to their particular software subsystem. If not a certified USS, they should return the ticket to Triage once the bug has been confirmed and requests reassignment to the cognizant lead.

9 Drafting and Publishing Knowledgebase Articles

Solutions to individual tickets cannot be seen by other users. If a solution is potentially useful to other users, the solution should be published as a KB article. KB articles can be searched by anyone at any time and do not require login to the helpdesk. The goal is that most queries will be answered if the KB articles are written appropriately.

In the process of typing their question in a helpdesk ticket, the user is also dynamically searching KB articles. Relevant KB articles will begin to appear in the page as a user types. As such, the subject line of the article should be indicative of the solution or in the form of a question and text of a KB article should be descriptive, including as many key words as possible that may be relevant to the article solution and include as many title words as possible because the automatic KB searched only the text of the KB articles and not the titles. The KB article also must be published in English and there should be no

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 38 of 56
---	--	---

identifying information that a user may consider proprietary. Therefore, answers to tickets specific to individual sources may have to be made more general to be published as a KB article.


KB articles should endeavor to reference existing documentation, even for general radio astronomy questions. However, KB articles should not answer questions on IT or computer hardware issues. For example, we should not include KB articles on general Mac or PC related issues. Rather, articles should be ALMA or ALMA-software specific. Finally, KB articles should avoid using terms like, “now”, “at this time”, or “currently.” Instead the articles should refer to the current or upcoming observing cycle (e.g. “during cycle 0 observations...”).

To ensure uniformity among KB articles, all USS should submit their KB articles with the “Article Status” option set to DRAFT (Section 6.5, Figure 11). This will post the article to the KB database but will NOT make it visible for general public viewing. These articles will be visible to other USS, Triage, the helpdesk manager and administrator. Each ARC is responsible for selecting a group of USS from their staff to moderate the submission of all KB articles before publication. These designated staff members will review the articles for clarity, scope and content ensuring that no proprietary or personal information is conveyed in the article. If there is any question about the proprietary nature of the information contained in the article, the USS should contact the initial user who submitted the ticket and confirm the requisite information may be posted for public viewing. Once the designated KB staff member(s) agree the article is ready for public viewing, the “Article Status” option should be set to PUBLISHED at which point it will appear in the general KB article search off the main helpdesk page.

Finally, the helpdesk is set up to make all Knowledgebase articles public and visible to all ARCs. This should not be changed except in exceptional circumstances. Should it be required, however, to have a knowledgebase category only visible to a single ARC (perhaps for language reasons), it is possible to make new categories (**Knowledgebase→Insert Category**) and to adjust the visibility of this to the other ARCs by hitting “Customize” in the “Template Groups” item.

10 Reports and Ticket Tracking

In accordance with the Helpdesk System Requirements (Req-11), the helpdesk has the ability to generate reports. To minimize customization of the Kayako software, reports are generated by an outside web application. Staff members can access the reports at the following URL using their Helpdesk Staff login credentials.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 39 of 56
---	--	---

<https://help.almascience.org/reports>

Several reports are accessible at this URL, depending upon the privilege level of the staff user. The following is a description of the reports available at each privilege level:

Level-1: User Support Specialist


- Ticket Tracker - allows a staff member from any ARC to view the status of a ticket that has been transferred to another ARC. Simply enter the ticket ID, and a summary of its contents, including the audit log, will be displayed.
- Knowledgebase Articles - Summary of KB articles, including status, author and editors.
- Department Summary - Department statistics across ARCs.
- Summary over Time - Statistics for a given time period.

Level-2: Triage Staff

- Includes all the Level-1 reports and also the following 2 searches.
- Ticket Search - allows the triage staffer to search for tickets by a variety of filtering criteria. (e.g., owner staff name, ticket status, ticket submission date range, department, select public departments only)
- Ticket Assignment Statistics - provides a detailed report on the number of tickets assigned to staff members during a specified time period.

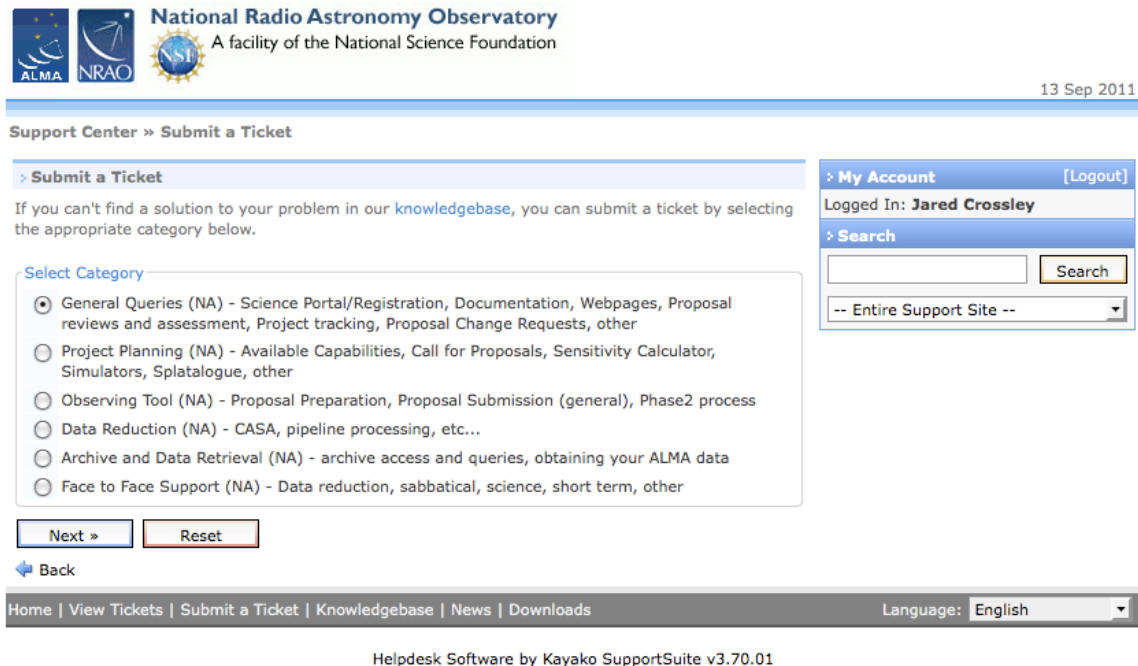
Level-3: Helpdesk Manager

- Includes all the Level-1 and -2 reports, with the added capability of viewing combined statistics across both the NRAO and ALMA helpdesks.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 40 of 56
---	--	---

A. APPENDIX: Helpdesk Entry Forms

In this section, we added screenshots for the user interface and entry forms for all departments in the ALMA helpdesk.



13 Sep 2011

Support Center » Submit a Ticket

Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can submit a ticket by selecting the appropriate category below.

Select Category

- ☒ General Queries (NA) - Science Portal/Registration, Documentation, Webpages, Proposal reviews and assessment, Project tracking, Proposal Change Requests, other
- ☐ Project Planning (NA) - Available Capabilities, Call for Proposals, Sensitivity Calculator, Simulators, Splatalogue, other
- ☐ Observing Tool (NA) - Proposal Preparation, Proposal Submission (general), Phase2 process
- ☐ Data Reduction (NA) - CASA, pipeline processing, etc...
- ☐ Archive and Data Retrieval (NA) - archive access and queries, obtaining your ALMA data
- ☐ Face to Face Support (NA) - Data reduction, sabbatical, science, short term, other


[Next »](#) [Reset](#)




[Back](#)

Home | [View Tickets](#) | [Submit a Ticket](#) | [Knowledgebase](#) | [News](#) | [Downloads](#) Language: [English](#)

Helpdesk Software by Kayako SupportSuite v3.70.01

Figure A1. Logged in view of the departments of the helpdesk.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 41 of 56
---	--	---

National Radio Astronomy Observatory
A facility of the National Science Foundation

13 Sep 2011

Support Center » Submit a Ticket

Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can submit a ticket by selecting the appropriate category below.

Select Category

☒ General Queries (NA) - Science Portal/Registration, Documentation, Webpages, Proposal reviews and
☐ Project Plan
☐ Observing
☐ Data Reduc
☐ Archive and
☐ Face to Fac

General Queries

General queries on ALMA that are not in the scope of the other specified departments. Questions should be submitted to the General department concerning the ALMA Science Portal and Registration; where to find relevant documentation and webpages and to report errors or questions found on in those materials; questions on the proposal reviews and assessments (both science and technical) as well as problems with the ALMA Project Tracker; Proposal Change Requests

Next »

Back

My Account [Logout]

Logged In: **Jared Crossley**


Search




-- Entire Support Site --

Home | View Tickets | Submit a Ticket | Knowledgebase | News | Downloads
Language: English

Helpdesk Software by Kayako SupportSuite v3.70.01

Figure A2. Mouseover “tool tip” view with the scope of the department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 42 of 56
---	--	---




National Radio Astronomy Observatory
A facility of the National Science Foundation

27 Jul 2011

Support Center » Submit a Ticket » General Queries (NA)

Submit a Ticket
If you can't find a solution to your problem in our [knowledgebase](#), you can fill in the fields below with as much detailed information as possible and send it to our agents.

General Information
Priority: Default

General
Sub-categories:
Please specify areas of concern


☐ Science Portal/Registration
☐ Documentation
☐ Webpages
☐ Proposal reviews and assessment (science and technical)
☐ Project tracking
☐ Proposal Change Request
☐ Other


Message Details
Subject: *

My Account [Logout]
Logged In: **Anthony Remijan**
Search

-- Entire Support Site --

Figure A3. Entry form for the General Queries Department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 43 of 56
---	--	---



EUROPEAN ARC
ALMA Regional Centre

12 Sep 2011

Support Center » Submit a Ticket » Project Planning (EU)

Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can fill in the fields below with as much detailed information as possible and send it to our agents.

General Information

Priority: Default ▾

Project Planning - Please select areas of concern

Sensitivity Calculator:
☐ Web Interface
☐ OT Interface

Simulators:
☐ SIMDATA
☐ ALMA Observation Support Tool

Splatalog:
☐ Web Interface
☐ OT Interface

General Topics:
☐ Available Capabilities
☐ Call for Proposals
☐ Other

Message Details

Subject: *

Upload File(s)


My Account [Logout]


Logged In: **Kellytest Sharp**

Search

-- Entire Support Site -- ▾

Figure A4. Entry form for the Project Planning Department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 44 of 56
---	--	---



EUROPEAN ARC
ALMA Regional Centre

12 Sep 2011

Support Center » Submit a Ticket » Observing Tool (EU)

Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can fill in the fields below with as much detailed information as possible and send it to our agents.

General Information

Priority: Default

Observing Tool

Proposal Preparation:
☐ Correlator modes
☐ Mosaic fields
☐ Calibrator selection
☐ Calculated time estimates
☐ Technical feasibility

Phase 2 Process:
☐ SB generation
☐ ObsUnitSets

General Topics:
☐ Proposal Submission
☐ Other

Message Details

Subject: *

Upload File(s)


My Account
[Logout]


Logged In: **Kellytest Sharp**

Search

-- Entire Support Site --

Figure A5. Entry form for the Observing Tool Department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 45 of 56
---	--	---



EAST ASIAN ARC
ALMA Regional Center

12 Sep 2011

Support Center » Submit a Ticket » Data Reduction (EA)

Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can fill in the fields below with as much detailed information as possible and send it to our agents.

General Information

Priority: Default

CASA Information

Version: *
CASA version you are using (e.g., 3.0.0; can be obtained from the first line of logger messages after startup)

Operating System: *
The operating system on which you are running CASA

RedHat 4-32bit

Message Details

Subject: *

Upload File(s)


My Account [Logout]


Logged In: **KellyEastAsia Sharp**

Search

-- Entire Support Site --

Figure A6. Entry form for the Data Reduction Department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 46 of 56
---	--	---



EAST ASIAN ARC
ALMA Regional Center

12 Sep 2011

Support Center » Submit a Ticket » Archive and Data Retrieval (EA)

Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can fill in the fields below with as much detailed information as possible and send it to our agents.

General Information

Priority: Default ▾

Archive Access

Project ID:

Message Details

Subject: *

Upload File(s)

Browse...

Browse...

Browse...

Recipients

My Account [Logout]


Logged In: **KellyEastAsia Sharp**


Search

Search

-- Entire Support Site -- ▾

Figure A7. Entry form for the Archive and Data Retrieval Department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 47 of 56
---	--	---



EAST ASIAN ARC
ALMA Regional Center

12 Sep 2011

Support Center » Submit a Ticket » Face to Face Support (EA)

> Submit a Ticket

If you can't find a solution to your problem in our [knowledgebase](#), you can fill in the fields below with as much detailed information as possible and send it to our agents.

General Information

Priority: Default ▾

Face to Face Support

Project Code:

Number of visitors (1-3): 1

Suggested host/friend:
A familiar person at the ARC

Length of Visit:

☒ Short-term (<= 1 week)
☐ Long-term (> 1 week)

Approximate Begin Date:
mm-dd-yyyy

Approximate End date:
mm-dd-yyyy

Purpose of Visit: *

Message Details

Subject: *


> My Account
[Logout]

Logged In: **KellyEastAsia Sharp**

> Search

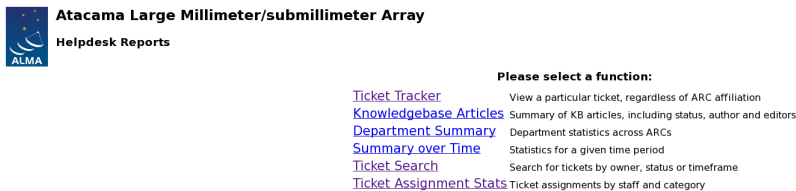
-- Entire Support Site --

Figure A8. Entry form for the Face-to-Face Support Department.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 48 of 56
---	--	---

B. APPENDIX: Report and Ticket Tracking Screens

In this section, we added screenshots of the Report and Ticket Tracking section of the helpdesk.

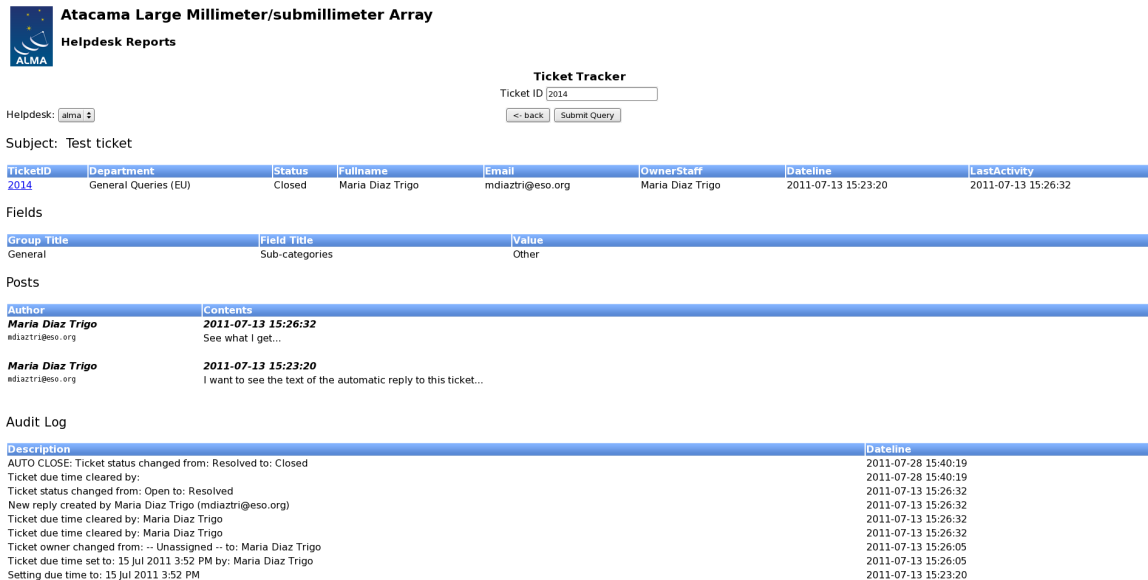


Atacama Large Millimeter/submillimeter Array
Helpdesk Reports

Please select a function:

- [Ticket Tracker](#) View a particular ticket, regardless of ARC affiliation
- [Knowledgebase Articles](#) Summary of KB articles, including status, author and editors
- [Department Summary](#) Department statistics across ARCS
- [Summary over Time](#) Statistics for a given time period
- [Ticket Search](#) Search for tickets by owner, status or timeframe
- [Ticket Assignment Stats](#) Ticket assignments by staff and category

Figure B1: Level-2 (Triage Staff) Helpdesk Reports Screen



Atacama Large Millimeter/submillimeter Array
Helpdesk Reports

Ticket Tracker

Helpdesk: Ticket ID:

Subject: Test ticket

TicketID	Department	Status	Fullname	Email	OwnerStaff	Dateline	LastActivity
2014	General Queries (EU)	Closed	Maria Diaz Trigo	mdiaztri@eso.org	Maria Diaz Trigo	2011-07-13 15:23:20	2011-07-13 15:26:32

Fields

Group Title	Field Title	Value
General	Sub-categories	Other


Posts

Author	Contents
Maria Diaz Trigo mdiaztri@eso.org	2011-07-13 15:26:32 See what I get...
Maria Diaz Trigo mdiaztri@eso.org	2011-07-13 15:23:20 I want to see the text of the automatic reply to this ticket...

Audit Log

Description	Dateline
AUTO CLOSE: Ticket status changed from: Resolved to: Closed	2011-07-28 15:40:19
Ticket due time cleared by:	2011-07-28 15:40:19
Ticket status changed from: Open to: Resolved	2011-07-13 15:26:32
New reply created by Maria Diaz Trigo (mdiaztri@eso.org)	2011-07-13 15:26:32
Ticket due time cleared by: Maria Diaz Trigo	2011-07-13 15:26:32
Ticket due time cleared by: Maria Diaz Trigo	2011-07-13 15:26:32
Ticket owner changed from: -- Unassigned -- to: Maria Diaz Trigo	2011-07-13 15:26:05
Ticket due time set to: 15 Jul 2011 3:52 PM by: Maria Diaz Trigo	2011-07-13 15:26:05
Setting due time to: 15 Jul 2011 3:52 PM	2011-07-13 15:23:20

Figure B2: Ticket Tracker page, queries based on ticket number; search results also shown



ALMA Science Operations


ALMA Helpdesk

Doc:
HelpdeskStaffManual_v2.6_ALMA.docx

Date: 2012-07-23

Status: Draft

Page: 49 of 56



Atacama Large Millimeter/submillimeter Array
Helpdesk Reports

Subject

Author

Status

Knowledgebase Articles

Created from / to

2011-04-01

2011-11-01

Edited by:

Edited from / to

Category

Any

Helpdesk:

alma

back

Submit Query

ID	Subject	Author	Status	Creation Date	Edited By	Edited On	Categories
151	I have a highly ranked proposal! When will I be contacted to review/submit my "phase II" materials?	John Hibbard	published	2011-09-10 07:12:52	Tony Remijan	2011-10-10 16:46:51	Early Science - Cycle 0
150	May I make changes to my project after the proposal review process?	John Hibbard	published	2011-09-10 06:58:33	Tony Remijan	2011-10-10 16:47:20	Proposal Handling
149	What should I do if I have an issue with my proposal assessment?	John Hibbard	published	2011-09-10 06:48:01	Tony Remijan	2011-09-10 16:41:04	Proposal Handling
148	Will the ALMA Cycle 0 target list be made public?	John Hibbard	published	2011-09-07 21:43:50	Tony Remijan	2011-10-12 12:16:16	Early Science - Cycle 0
147	test KB article...	Kelly Sharp	draft	2011-08-11 16:30:01	Kelly Sharp	2011-08-11 16:52:29	
146	Test KB alert notification	Kelly Sharp	draft	2011-08-01 22:11:26	Tony Remijan	2011-08-08 14:20:15	
145	split problems in CASA 3.2.0 and 3.2.1	Dirk Petry	draft	2011-08-01 10:12:16			Offline Data Reduction and/or CASA
144	The Proposal Submission Server for Cycle 0 Proposals is down or taking a long time to log on. What action should I take?	Tony Remijan	private	2011-06-30 15:25:41	Kelly Sharp	2011-07-06 20:02:53	Early Science - Cycle 0
143	I can't seem to register in the Science Portal! What could be the problem?	John Hibbard	published	2011-06-29 16:04:35			Science Portal
142	In cycle 0, how do I request specific weather conditions using the OT?	Jared Crossley	draft	2011-06-29 15:08:07	Jared Crossley	2011-06-29 15:11:17	Early Science - Cycle 0
141	Can I use "breakpoints" in ALMA cycle 0?	John Hibbard	published	2011-06-28 21:03:57	John Hibbard	2011-06-28 21:25:31	Early Science - Cycle 0
140	What is the measured bandpass stability or the expected bandpass stability for Early Science Cycle 0?	Tony Remijan	published	2011-06-28 13:26:07			Early Science - Cycle 0
139	How can I query Splatologue from IDL or Python?	Jared Crossley	published	2011-06-27 15:17:05	Tony Remijan	2011-06-28 12:35:19	Splatologue
138	How will users be notified when a new version of the OT available?	Akiko Kawamura	published	2011-06-26 13:38:24	Jared Crossley	2011-06-30 13:45:15	ALMA Observing Tool (OT)
137	What should I specify for "Largest Angular Scale of Source" in the OT?	Akiko Kawamura	published	2011-06-26 13:35:55	John Hibbard	2011-06-30 03:12:05	ALMA Observing Tool (OT)
134	In cycle 0, what time of day will be available for observing?	Akiko Kawamura	published	2011-06-25 18:00:27	John Hibbard	2011-06-30 03:16:11	Early Science - Cycle 0
135	May my Cycle 0 proposal include a Co-I whose affiliation is not in any of the ALMA project countries?	Akiko Kawamura	published	2011-06-25 18:00:27	John Hibbard	2011-06-30 03:19:49	Early Science - Cycle 0
133	Do I really need to list "ALL" publications for the last three years for "ALL" investigators on my proposal???	John Hibbard	published	2011-06-24 21:38:32	Jared Crossley	2011-06-28 14:02:18	ALMA Observing Tool (OT)
132	How do I set up a mosaic in the OT?	John Hibbard	published	2011-06-23 14:21:14	Jared Crossley	2011-06-28 15:15:15	ALMA Observing Tool (OT)
131	Can I make a single dish observation in Cycle 0?	Akiko Kawamura	published	2011-06-23 14:03:10	John Hibbard	2011-06-30 03:32:32	Early Science - Cycle 0

Figure B3: Knowledgebase Articles search query with results

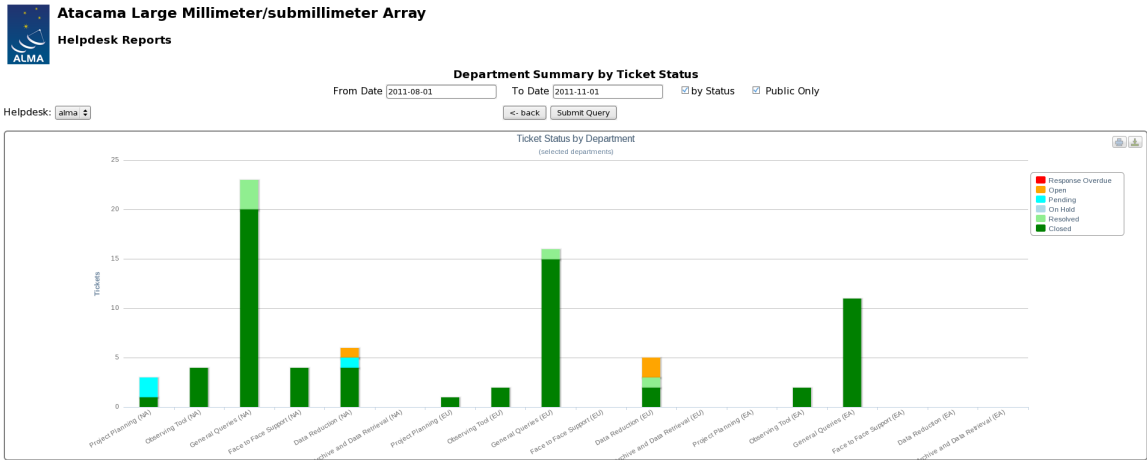


Figure B4: Department summary; grouped by ticket status

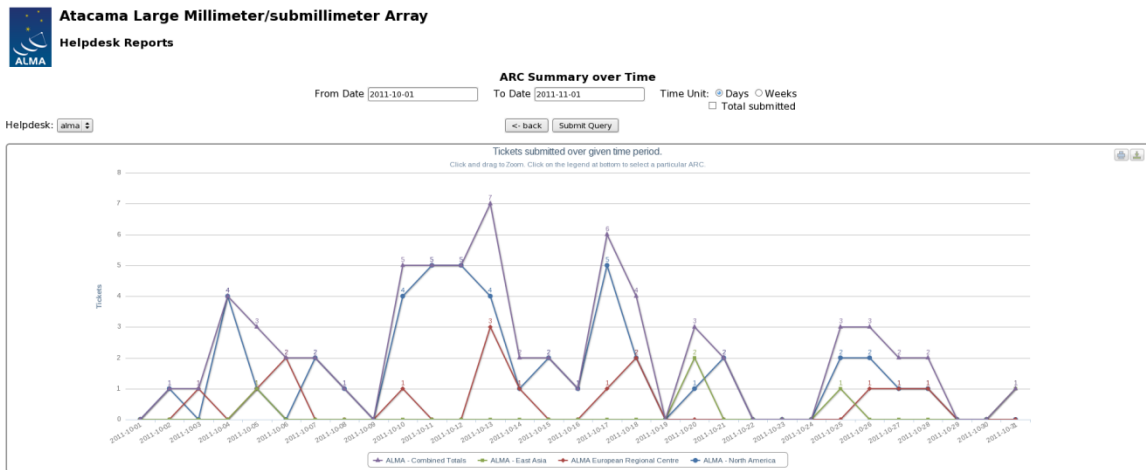


Figure B5: Tickets submitted broken down by day and ARCs

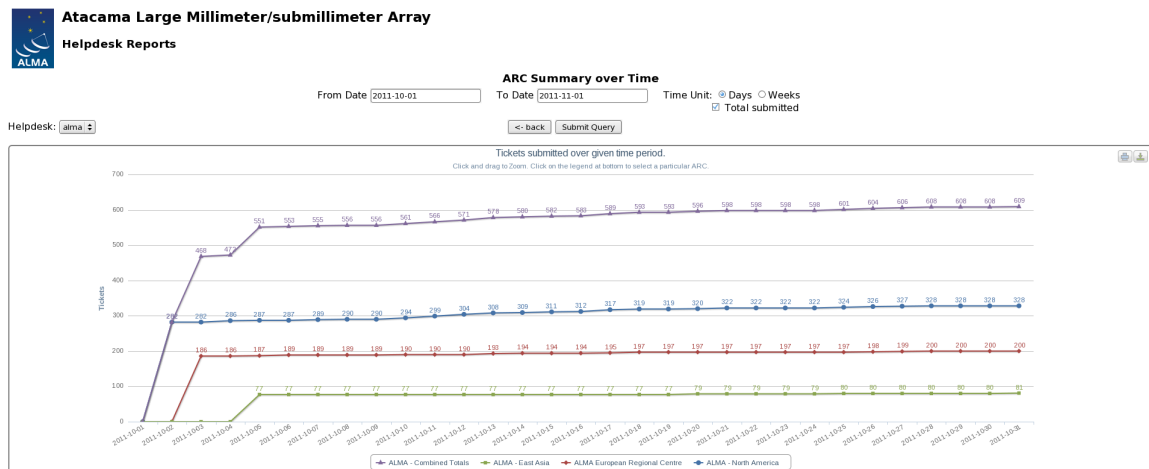



Figure B6: Tickets submitted, summed up over days, broken down by ARC



ALMA Science Operations

ALMA Helpdesk

Doc: HelpdeskStaffManual_v2.6_ALMA.docx

Date: 2012-07-23

Status: Draft

Page: 51 of 56

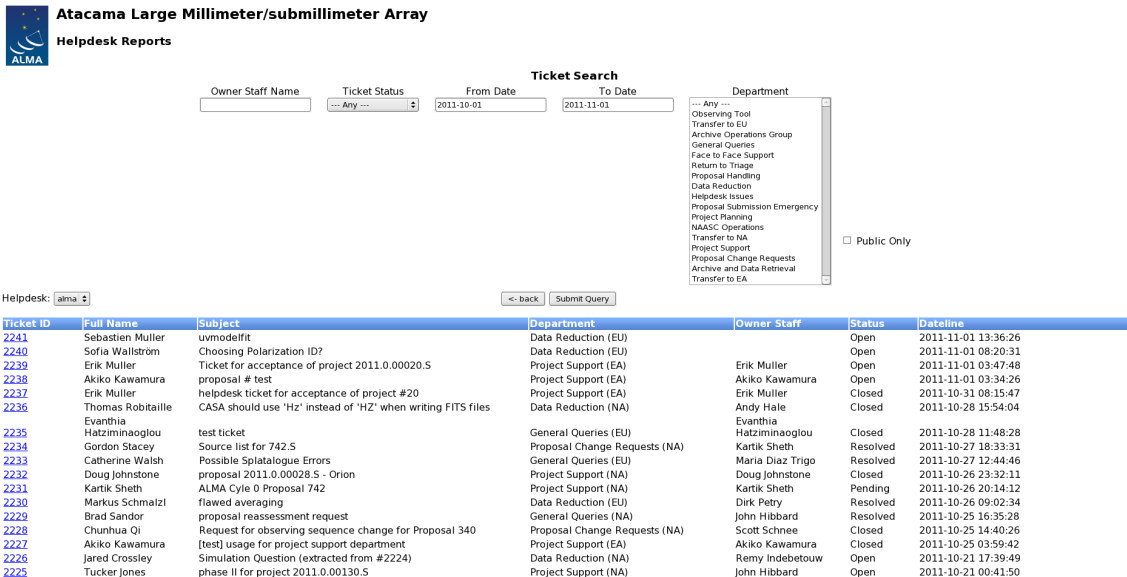



Figure B7: Ticket search; query parameters and results




Figure B8: Ticket counts broken down by staff member and ticket status

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 52 of 56
---	--	---

C. APPENDIX: USS Checklist for Answering Helpdesk Tickets

Checklist for USS in answering a submitted helpdesk ticket:

- ✓ Login to the helpdesk (Section 7.1) after you have received your email notification.
- ✓ View the ticket (Section 7.4.1)
- ✓ Examine it (Section 6.1) and take the following actions:
 - If you have enough information, “Post Reply” to the user (Section 6.1.2) and **change the ticket status to “Resolved”**.
 - If you need more information from the user, **change the ticket status to “Pending”** when posting your reply (Section 6.1.3). Wait for the user to respond.
 - If you need to forward the ticket to someone outside the Kayako system, follow the procedure in Section 6.4 and make sure to “Quote” the ticket to send the contents of the correspondence.
 - If you believe the ticket needs to be sent to another ARC, sent to the Proposal Handling Team, or sent to the Change Request Standing Committee (Section 4), **change the department to “Return to Triage”** (Section 6.2) and add a note why.
 - If you are unable to respond to the ticket (for example, because you lack the specialized knowledge, or because you are unavailable) the ticket should be returned to Triage (Section 6.2) with a note explaining why.
- ✓ While posting a reply, determine if the ticket warrants a knowledgebase article (Section 9). If so, **post the article with the “Article Status” option set to DRAFT (Section 6.5, Figure 11). DO NOT Publish the article.**
- ✓ If you are the cognizant lead or a certified USS for a particular software subsystem, you should follow the workflow described in Section 5 and **change the ticket status to “Resolved”** after reporting the enhancement request or bug fix to the appropriate issue tracking system.
- ✓ Repeat accordingly for all your tickets remembering that you have two working days to reply to an assigned ticket before the status changes to “Response Overdue”.
- ✓ When you are finished, log out of the helpdesk and go do some science.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 53 of 56
---	--	---

D. APPENDIX: Software Bug-Reporting Systems

This appendix lists details of the various bug-reporting systems used across the project. Helpdesk support staff use these systems to file user-reported software bugs or enhancement requests.

The Helpdesk Staff Guide describes the workflow (section 5), which in general is to transfer the ticket to triage with a note to have it assigned to the relevant support staff (as listed in the "Who Submits Report" field in the tables below; sometimes this involves first transferring the ticket to a specific ARC). The staff then opens a ticket for the software developers in the appropriate bug-reporting system.


CASA

Supported By:	NRAO
Bug-report System Location:	NRAO bug-reporting system
Category:	-
Project:	CASA (CAS)
Component:	As appropriate
Who Submits Report:	Regional CASA Cognizant leads and staff they "certify"; Use JIRA "Assignment" tab to assign JIRA ticket to Regional CASA Cognizant lead (see notes)
Request Access from:	Cognizant leads send list of approved staff to Jeff Kern (list of CASA-certified staff maintained at CASAstaff)

Notes:

"Certified staff" are those with a good working knowledge of CASA, as vouched for by the regional CASA cognizant leads. (List of certified staff is maintained on the [CASAstaff](#) webpage)

Cognizant Leads are "gatekeepers" to make sure "due diligence" was performed on ticket before it gets to the CASA developers. As such, they are assigned and review every ticket that is submitted by ARC staff to the CASA JIRA system. If they believe more work needs to be done on ticket before being passed along to CASA developers, they communicate this to the submitter. Otherwise, they change assignee to the appropriate developer.

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 54 of 56
---	--	---

Observing Tool

Supported By:	CIPT
Bug-report System Location:	<u>JAO bug-reporting system</u>
Category:	ALMA Test Facility (ATF)
Project:	Computing (COMP)
Component:	Observing Preparation and Support
Umbrella Ticket:	COMP-5023
Who Submits Report:	Transfer to EU ARC; assign to ObsPrep SubsysSci or designee (Biggs/ Humphries)
Request Access from:	Max Simmons, after approval from Alan Bridger


Notes:

OT Cognizant Leads/deputies should be given permissions to read tickets and add notes.

Submitted bugs should be added by OT Developer to the OT "[Known Issues](#)" page.

ALMA Science Archive

Supported By:	CIPT
Bug-report System Location:	<u>JAO bug-reporting system</u>
Category:	
Project:	ASA (CIPT) (NOT YET AVAILABLE)
Component:	
Umbrella Ticket:	
Who Submits Report:	Regional ASA Subsystem Cognizant Leads .
Request Access from:	Max Simmons, after approval from Felix Stoehr


	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 55 of 56
---	--	---

SPLATALOGUE

Supported By:	NRAO
Bug-report System Location:	NRAO bug-reporting system
Category:	-
Project:	<u>Splatalog (SPLT)</u>
Component:	-
Who Submits Report:	Transfer to NA ARC; Assign to Splat Subsystem Sci or designee (Remijan/Pulliam)
Request Access from:	<u>Stefan Witz</u> , after approval from Tony Remijan

SIMDATA

Supported By:	NRAO
Bug-report System Location:	NRAO bug-reporting system
Category:	-
Project:	<u>CASA (CAS)</u>
Component:	Simulation
Who Submits Report:	Transfer to NA ARC; Assign to Simdata Subsystem Sci, Remy Indebetouw , or designee.
Request Access from:	<u>Stefan Witz</u> , after approval from Remy Indebetouw

	ALMA Science Operations ALMA Helpdesk	Doc: HelpdeskStaffManual_v2.6_ALMA.docx Date: 2012-07-23 Status: Draft Page: 56 of 56
---	--	---

Ph1M

Supported By:	CIPT
Bug-report System Location:	<u>JAO bug-reporting system</u>
Category:	ALMA Test Facility (ATF)
Project:	<u>Computing (Comp)</u>
Component:	<u>Observatory Operations Support</u>
Umbrella Ticket	<u>COMP-5687</u>
Who Submits Report:	Transfer to PHT department in kayako; PHT transfers bug/enhancements to above JIRA system & relates this back to ARCs via notes in kayako.
Request Access from:	Not needed (only PHT submits JIRA tickets)

Project Tracker

Supported By:	CIPT
Bug-report System Location:	<u>JAO bug-reporting system</u>
Category:	ALMA Test Facility (ATF)
Project:	<u>Computing (Comp)</u>
Component:	<u>Observatory Operations Support</u>
Umbrella Ticket	<u>COMP-5688</u>
Who Submits Report:	<u>Regional PT Subsystem Cognizant Leads</u>
Request Access from:	Max Simmons, after approval from???