NRAO-ALMA Integrated Helpdesk Requirements

V1.0 – 2014/09/26

# Summary

The NRAO currently operates two independent helpdesk systems, one for NRAO facilities (excluding ALMA) user support and one for ALMA user support. Both helpdesk systems use software sold by Kayako. The helpdesk system provides bi-directional, private user correspondence through *tickets* and one-directional, “broadcast” user support through a *KnowledgeBase* (KB). The ALMA helpdesk is used by the 3 ALMA Regional Centers (ARCs) to support their users. Although the ALMA helpdesk software and hardware is maintained by NRAO, great care has been taken to remove from the European- and East Asian-user experience any indication that the helpdesk system is a North American product. To maximize observatory efficiency, NRAO desires to operate an integrated helpdesk system that can service all NRAO and ALMA users.

The benefits of an integrated helpdesk are:

* One login provides access to both helpdesks, for users and staff.
* Staff can search all CASA tickets.
* NRAO helpdesk users see an integrated KB.

Constrains on the integrated helpdesk are described in section 2. An enumerated list of requirements is given in section 3. In section 4, ticket departments are organized by telescope. The PowerPoint slides, HDIntReqSlides\_v1.0.pptx, provide graphical examples of the user interface.

# Constraints – ALMA

The ALMA helpdesk working group has agreed that ALMA user support should take place through a user interface that is uniform for all ARCs and all users. To this effect, the integrated helpdesk will maintain two distinct user interfaces, one for NRAO and one for ALMA. The ALMA user interface will contain sidebar links to the helpdesks managed by institutions to which the ALMA user has linked their account. The ALMA user interface will contain only ALMA KB articles.

# Integrated Helpdesk Requirements

## General

1. Existing tickets and KB articles will remain accessible and editable. The ticket department or KB article category may change (for NRAO tickets and articles), but nothing else should change.

## User Interface

1. User access to the helpdesk system will occur through two Internet domains: help.almascience.org is the domain for the ALMA user interface. help.nrao.edu is the domain for the NRAO user interface.
	1. All emails from the helpdesk will use the appropriate domain. ALMA tickets will generate emails that include URLs for help.almascience.org. NRAO tickets will generate emails that include URLs for help.nrao.edu.
2. The banner at the top of the page will distinguish the two user interfaces. The ALMA interface will contain the ALMA banner with affiliated ARC logo in the top right corner, in like manner to the Science Portal. The NRAO interface will contain the NRAO banner, as seen in the current NRAO helpdesk.
3. The interfaces are connected by sidebar hyperlink and radio button hyperlink (NRAO).
4. Users with linked accounts will be able to see all tickets (including ALMA ticket) at one time. Only ALMA tickets will be visible in the ALMA ticket view.

## Account Linking

1. Account linking will be accomplished within the Science Portal, using the user’s profile page, and will allow bi-directional movement between user interfaces without subsequent login.
2. The ALMA interface will include hyperlinks to linked institutions on the left sidebar.
	1. If no institutional linkage has been created, the user will see “Link to ESO, NAOJ, or NRAO Accounts”. Clicking this will generate a pop-up window with instructions on how to link accounts.
	2. Sidebar links will include an institutional logo. Below the logo(s), “Change Account Linkage” will take the user to the Science Portal profile page.
3. The NRAO interface will include a hyperlink to the ALMA interface on the left sidebar and the “Select a Department” page.
	1. The left sidebar will resemble the sidebar used on the ALMA interface by displaying the ALMA logo and “ALMA Helpdesk”. For users *without* linked accounts, clicking this will generate a pop-up window with instructions on how to link accounts. For users with linked accounts, clicking this will take them to the ALMA helpdesk. Within the pop-up window, a link to help.almascience.org will also be provided for users who want to access the ALMA helpdesk without linking accounts.
	2. The “Select a Department” page will show departments organized by telescope. Radio buttons (or equivalent) for VLA, VLBA, and GBT will display departments relevant to those instruments.
	3. The ALMA radio button, instead of displaying departments, will:
		1. Send user with account linkage directly to the ALMA helpdesk “Select a Department” page.
		2. Generate for user without account linkage the same pop-up window described in (a), above.

## Knowledgebase

1. Knowledgebase categories will be divided into two groups: those that pertain to ALMA, and those that do not.
	1. Only ALMA-relevant categories will be displayed in the ALMA user interface.
	2. All categories will be displayed in the NRAO user interface.
2. Only NRAO staff can edit NRAO KB articles.

## Staff Interface

1. A single staff login will allow access to all NRAO and ALMA tickets.
2. All staff will be able to search across all CASA departments.
3. NRAO staff will be able to search across all NRAO and NA ALMA departments.
4. EA and EU ALMA staff will not have access to NRAO departments other than CASA.

# Ticket Departments

The table below shows current ALMA departments and proposed NRAO departments. Shaded departments appear under multiple telescopes.

