Helpdesk Managers/Admins f2f Meeting
Mitaka, Japan
May 7-8, 2012

The second f2f meeting of the helpdesk managers has been scheduled for May 7-8, 2012 at NAOJ in Mitaka, Japan. Specific topics of discussion for this meeting were to put in appropriate workflow for the proposal submission emergency department and for the phase 2 tickets going into the Cycle 1 call for proposals. The working group is planning to make recommendations to the SciOps IPT in order to prevent the procedural problems that occurred during the server crash during the last hour for the Cycle 0 CfP in order to prevent the influx of ticket that occurred during that time and to mitigate the action of users trying to constantly resubmit proposals putting excessive load on the system. We also plan to discuss in detail the interaction with the CRSC and PHT teams and the overall workflow for "Ph2" tickets and how this may change as we go into Cycle 1 observations. Recommendations will be made by the Helpdesk WG to better engage with the CRSC. There was also a large discussion in the afternoon on the second day on the "integration" of the ALMA and NRAO helpdesks. While the plan for this integration is set to take place on a timescale of ~6 months, a policy change on "non"-ALMA staff viewing proprietary information at EU and EA needs to be discussed with the SciOps IPT.

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

Monday, May 7, 2012 – 10:00AM Start – AM Session

Introduction of new helpdesk staff to the f2f meeting
  o Evanthia Hatziminaoglou (EU) (not attending) – joined helpdesk triage staff in Oct 2011
  o Mike Hatz – IT infrastructure; important server side questions and data delivery issues.
  o Bhola Panta – EA SP manager – Helpdesk infrastructure software will be discussed w/Kelly at some during the week
  o Akiko Kawamura (EA) – April 2011 joined the EA ARC, Started Helpdesk Triage, June 2011
Review of action items from the last f2f meeting
  o Ticket that involves more than one staff member:
      o Kayako can do the opposite – merge tickets but not combine tickets. Would take a large amount of coding to go the other way. But, this seemed to be a unique sitiation – all ARCs will continue to manage their own workflow for these tickets. No coding necessary.
  o Proposal Emergency Department (should we "force" users to submit to this department?). Times for RoTA. => I have modified the text in the PG to explicitly say that tickets should be submitted to that department and not OT or Archive if users want an immediate response.
      o Related to the Emergency Dpt RoTA, should we make OT/Archive departments available to all ARCs for the last 8 hrs or so before deadline so that an ARC which is not monitoring Emergency Dpt can check the OT/Archive for all ARCs to cover the case of users who fail to send the emergency ticket to the emergency dpt?
          ▪ In this case no… We will make every effort to make the emergency department visible enough that if users need an immediate response, all tickets should be submitted there.
      o In the Proposers Guide – Emergency department will be answered for all tickets immediately…
          ▪ How do we make users submit to this department?
              • Improve text for tool tips?

- o Tool tip already exist
- Close other departments?
  - o NO - too extreme – don't want to do that and will confuse people.
- Draw more attention to the department somehow? – move it to the top of the list; bigger, pulsating red…"any problems related to the 'Cycle 1' proposal deadline"
- o Will OPEN 36 hours before the deadline NOT 72!
  - ▪ ACTION ITEM: Maria will change the text in the Proposers Guide.
- o NEW ROTA for 36 hours before the deadline:
  - ▪ EA: 03 - 09 UT (12PM - 6PM Local Time) –
    - ACTION ITEM: Kazuya opens the department as ADMIN – Kelly will show how
  - ▪ EU: 09 - 15 UT (11AM - 5PM Local Time)
  - ▪ NA: 15 - 03 UT (11AM - 11PM Local Time)
    - In the 24 hours period above, Japanese language tickets will be answered, "please submit in English" or "your ticket will be answered in Japanese starting at 03UT".
  - ▪ EA: 03 - 08 UT (12PM - 5PM Local Time)
  - ▪ EU: 08 - 15 UT (10AM - 5PM Local Time) - 15UT - Proposal Deadline – EU Closes department; EA available for Japanese language tickets ONLY!
- o What happens in the case of this emergency?
  - ▪ SciOPs IPT MUST have workflow in the event the server crashes…what is that workflow; needs to get it to the Helpdesk. – ACTION ITEM: Tony to make the following recommendations to the SciOpsIPT:
  - ▪ RECOMMENDATIONS:
    - Gautier makes the decision to post an announcement to the science portal 5 mins after an "apparent" server crash…"please try again in 30mins" > 1 hour before the deadline.
      - o If it crashes in the last hour – an immediate decision for an extension (for whatever time) is made or some other contingency, e.g. Helpdesk should NOT receive the proposals.
      - o If SP doesn't come back within the last hour, an extension needs to be made and an new announcement on the SP.
    - Same text that goes on SP needs to go on as many pages in the helpdesk when logged on or not. Also make a KB article to announce that there was/is a server problem. "If I don't get an email reply, do I have to worry?"
  - ▪ ACTION ITEM: Suzanna to check with the OT people for a descriptive error (a link to the SP) of the problem when the server is down, etc...
  - ▪ ACTION ITEM: Maria will write a KB article to remind users to add their co-Is and have their co-Is register well before the proposal deadline (at least 24 hours
    - Should go into the OT documentation – may already be there but made clear. – ACTION ITEM: Suzanna to followup with Andy/Evanthia. Already in the proposers guide and CfP.

- Workflow for f2f visit tickets – any ticket with a "Custom Field update" (update guide wrt form & status of tickets; Kelly, is it possible to add pop-up to remind users of filling feedback forms before closing tickets?)
  - Alerts when users just "update" the additional fields. Status of that action?
    - ACTION ITEM: Kelly – will generate an alert outside of the Kayako alert system, a bit of custom coding will be required for this action. Make this a higher priority fix (#2513). Especially impt for EU as they assign f2f tickets to ARC nodes.

- Reporting Pages
  - Will have to be re-coded for Kayako 4 but many of the report are already built in. Some of the more customized reports will have to be rebuilt.
  - KB article reporting
    - ACTION ITEM: Kelly will check to see if this is built into Kayako 4.
    - ACTION ITEM: Put the whole text of the article that is updated or posted new into the email alert. (Kelly).
- Status of Ph2 tickets (status of tickets after SB generation, project in observing queue, going through QA2... - customize table to show project number)
  - ACTION ITEM: Change the name of the Phase 2 Generation department to – "Cycle 0(1) Observing Programs" (Kelly)
  - ACTION ITEM: Kelly will investigate putting in an automatically generated subject line where the Contact Scientist/Triage must put in the Project ID – "Your ALMA Project – XXXXX"
    - Workflow for the Cycle 0(1) Observing Program Department
      - Pending/Open as work is still being done on the SB validation
      - On Hold – the SB has been approved by the PI and the project is ready to be observed.
      - Resolved – when the data are staged/delivered and ready for the PI for download or at the end of the current observing cycle if they have not been observed.
      - ACTION ITEM: Bhola & EU will see if it possible to have the same data delivery process for each ARC through CAS authentication and htaccess!!!!

Adjourn for lunch ~12PM

Monday, May 7, 2012 – 1:30PM Start – PM Session

Review of existing workflow
- Interaction with CRSC and PHT teams*. Are they getting alerts…how long should we expect to wait for replies? Workflow for Change Request tickets (bcc to P2G with final decision at least in EU)
  - Edited workflow on Page 7…will be different for the different ARCs.
  - ACTION ITEM: Tony will present the following to the SciOps IPT for consideration:
    - PROPOSAL: Request that the CRSC changes be discussed during the Thurs SciOps IPT meeting for an updated on the status.
    - Also, perhaps members of the SciOps IPT (ARC managers?) should be part of the CRSC? Why is it only JAO? Suggested because of the

turnaround time for decisions on tickets needs to be much shorter in Cycle 1.
- Proposed Pre-defined reply is now saved in the Helpdesk.
  - ACTION ITEM (Kelly): EMAIL ALERTS! – CRSC and PHT are getting the email alerts. However, when tickets are opened on behalf of the user and email addresses are added to the "CC" or "BCC" fields, they are NOT being delivered the first time the ticket is opened. Only after a "Post Reply" is done are the tickets being delivered.

- o Info needed from Ph1M to reply to tickets from PIs.
  - The ARC managers need full technical reviews for all proposals after submission for the helpdesk.
  - Request a list of Project IDs & PIs a couple days (~2-3 days) after the proposal deadline to the ARC managers of successfully submitted projects.
    - If project tracker is working, then we don't need this as triage staff should have the privileges to check the status of the proposal. ACTION ITEM: Tony will follow up with Juan about setting up the appropriate privileges in the Project Tracker for Helpdesk Managers/Triage.
- o Should we add something like "Below the "New Ticket: ..." line, this is an automatically generated e-mail.
  "Do not answer to this e-mail. Instead, follow the link at the bottom of the e-mail. " at the automatic reply? EU users still replying to the 'do-not-reply' address...
    1. There is a new "Predefined Reply"… Here is the text: "Remember, all correspondence with ARC staff must take place through the ALMA Helpdesk. Please do not reply directly to this email. Instead follow the link below to re-enter the ALMA Helpdesk and post your reply."
    2. Can we make it that the user can just "reply" to the auto-generated email and that reply gets posted to the email ticket? Not for Cycle 1…perhaps when we transition to Kayako 4 – lower priority…
    3. Can we take out from the body of the email, the reply the staff member posted to the ticket. Instead, just have a generic link that says, "your ticket has been replied too…click here to access your ticket"? Need to somehow bypass the SPAM filter…higher priority. If we can do 3), no need for 2) or 1) actually. ACTION ITEM: Kelly will work on this "Pre-defined" response when a ticket reply is posted.

Plans for improving- Helpdesk visibility – submitted NAASC ops HD tickets:
- o Make two links in the main SP page: one is in the left menu, just under 'Documents & Tools', and is called 'Knowledgebase/FAQ' and takes the user directly to the KB front page.
  - o AGREED – ACTION: Maria to follow-up w/Tommy & Alavaro
- o The second link stays where it is at the moment and says 'Helpdesk'. However, when clicking there, it takes the user directly to the CAS authentication page, if the user is not authenticated yet. The CAS page should explain that the user name and passwd is the same as the one of the ALMA portal. If the user is already authenticated via SP, the link goes to the helpdesk ticket submission/view page.
  - o AGREED – ACTION: Maria to follow-up w/Tommy & Alavaro

Adjourn for dinner 6PM

Tuesday, May 8, 2012 – 9:00AM Start – AM Session

Review of Monday sessions – clean up any loose ends
Plans for improving **-** Helpdesk visibility – submitted NAASC ops HD tickets

- o If the above is implemented, the 'login' from the KB page should be removed to avoid confusion (i.e. avoid giving two different places to authenticate)
  - o We will keep the "login" button but work on the text surrounding the button. This will have to change with Kayako 4 as well.

- o The item 'news' in the helpdesk page could be removed, since it doesn't contain anything.
  - o ~~Removed the News link…lets see if anyone notices. Removed the Downloads link…see if anyone notices. (Kelly)~~

- o The text under 'View Tickets' should remove that 'tickets can be submitted here'
  - o ~~Removed that text…(Kelly)~~

- o The top banner on the browser says: "ALMA Observer Support - Powered by Kayako..." or "ALMA European Regional Centre - Powered by Kayako...". Can the "powered by kayako..." be removed at that place? It seems as if the ALMA ARCs were powered by kayako....
  - o ACTION ITEM: Remove that text. (Kelly)

- o We've been discussing whether the 'categories' KB page or the 'last/most seen articles' should be the one accessed when clicking on KB/FAQ. We have different opinions here and should probably discuss this in the Helpdesk WG.
  - o Again, we want a combination of the 2 where you have the most popular articles in the main frame and the list of KB catagories on the right. (Kelly)
  - o ~~Changed the text of the "Popular Knowledgebase Articles" to "Popular Knowledgebase Articles / Frequently Asked Questions"~~
  - o ~~Changed the text of "Support Center" to "Helpdesk Home" at the top of the frame~~
  - o ~~Changed "Home" on the footer to "Helpdesk Home"~~

- o We felt that we should make the user more 'conscious' that Helpdesk is part of the SP (even if it really isn't...). What about adding a link in the Helpdesk and KB pages saying 'Back to SP home' or something of the kind.
  - o ~~ACTION ITEM for Kelly: Will put a link called "ALMA Science Portal >>" before the "Helpdesk Home" link at the top of the main frame.~~

- o The link on the logo in the Helpdesk page is inconsistent... If you have not login yet, it goes to 'http://www.almaobservatory.org/', if logged in EU, it goes to http://www.eso.org/public/teles-instr/alma.html. At least for EU users, it should go to the local pages of the ARC, which is under http://www.eso.org/sci/facilities/alma/arc.html. For people not logged in yet, I guess we can send then to almascience.org instead of almaobservatory.org, what do you think?
  - o These changes have now been implemented…

Review of KB departments
- o Consolidation of departments – don't like 1 article per department
  - o Reduced the number of departments from 16 to 8.

- New 8: General, OT, CASA & Offline, Project Planning, Resources & Observer Support, ES – Cycle 1, Archive & Data Retrieval, Proposal Handling.
- Keep the NA specific department for the Development Program.
  - o User instructions after removal of "Comments" field.
    - o ACTION ITEM: Tony will make a relevant KB article about commenting on a KB article. Also, will edit the instructions page on how to add a comment to the article. WG will review text.
    - o Update of KB articles with comments from users (each ARC takes care of their responsible area – see below).
  - o Update every ~3 months or with new release of software (CASA, OT, etc..) (distribute categories per ARC)?
    - o EU – OT, Proposal Handling, Documentation, f2f visits, Science Portal, Sensitivity Calculator, Online Simulator
      - Suzanna & Evanthia – update the OT articles
    - o NA – Helpdesk, Simdata, CASA, Splatalogue
      - DAs - Cycle 0 to Cycle 1 articles & publish as draft/go live after call.
    - o EA – ACA, SD CASA, General, Science Verification, Archive
    - o Reinforce that Science Staff should NOT publish articles…the responsible ARC will take care of publishing article.
    - o CHANGE FROM LAST YEAR – each ARC takes responsibility to publish and update for their own area of expertise based on the above breakdown.
    - o ACTION ITEM: NEED TO REVIEW the searching both the SP and KB articles seems to be broken because of name the Plone site has changed from /asa to /portal. Kelly will work on this.

ACTION ITEM: EU – Follow-up with Paola and the DSO to get the requested requirements changes approved.
https://docs.google.com/spreadsheet/ccc?key=0AuwdxaSy32SfdDZqekRpakJjVFRkTTl4d0xzTXlqWlE&pli=1#gid=0

Update of users e-mails in database (upon change of e-mail in the SP)
- o Still not working. ACTION ITEM: Kelly will investigate and report on a resolution. HIGH PRIORITY!

Workflow for f2f visit tickets (update guide wrt form & status of tickets; Kelly, is it possible to add pop-up to remind users of filling feedback forms before closing tickets?)
- o EU has a feedback form that the users "have" to fill out after they have visited an ARC node. Does NA or EA have similar forms?
  - o User opens ticket – assigned to Node, not resolved until the visit is over. When the visit is over, the user is requested to fill out form. No real way in the Helpdesk to alert the user to the form, except a link in a "pre-defined reply".
  - o ACTION ITEM(S): EA and NA will look into whether we have forms after a visit. EU will send the survey around for review.

Adjourn for lunch ~12PM

Tuesday, May 8, 2012 – 1:00PM Start – PM Session
- o Discussions on Kayako 4.0 release
    - o Need to take out all the options for setting user preferences. Needs to be done through the ALMA Science portal.
    - o Put the KB catagories on the right instead of the left hand side.
    - o Need to make it look much more like the Science Portal. The priority where we are going for Kayako 4 and not changing the look and feel of Kayako 3.7. All the other changes to the "style" should not be done on 3.7.

- o Integration of NRAO/ALMA helpdesk into 1 Kayako instance.
    - o From the NRAO helpdesk integration discussion, it was decided that the NRAO helpdesk database should be absorbed in the ALMA instance of Kayako. In the end the helpdesk will look like:
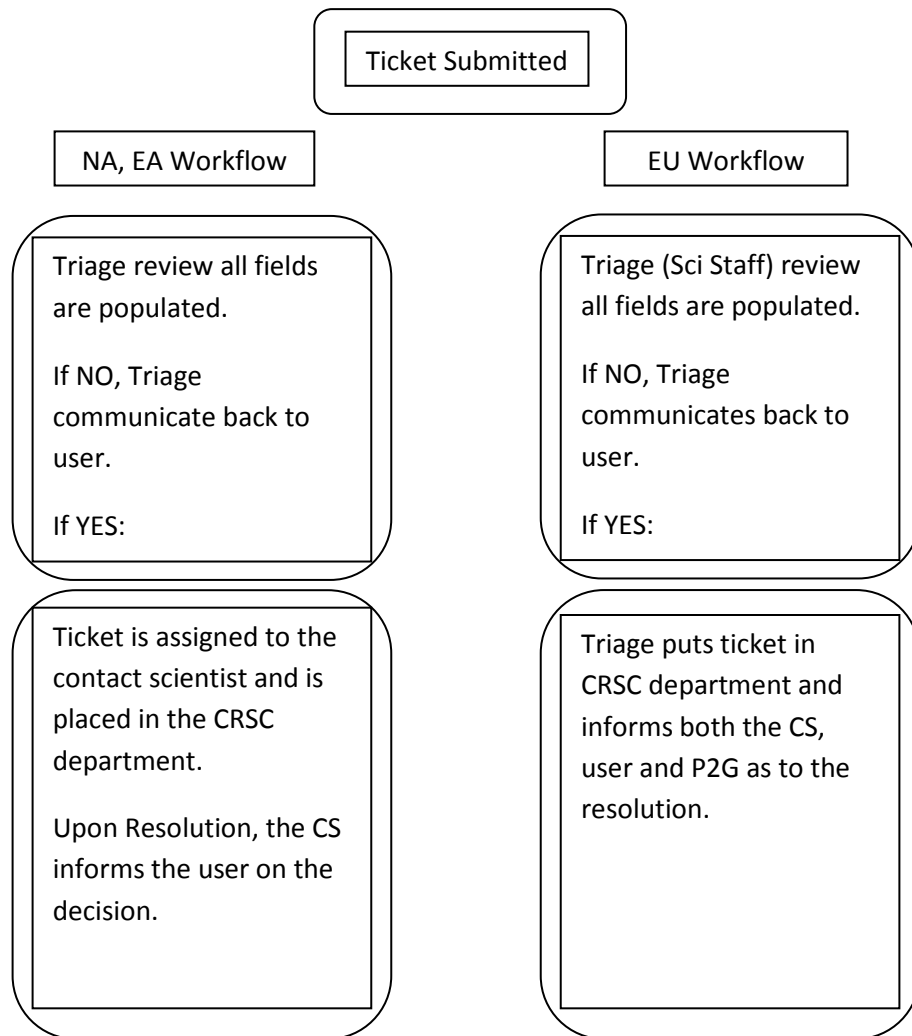
NA ARC	EU ARC	EA ARC	NRAO
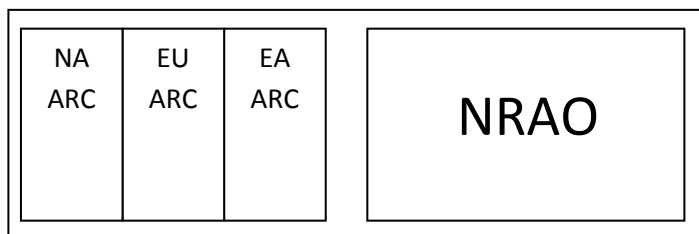
- o All the NRAO departments will just look like another ARC. Remijan has discussed this setup with the other ARC helpdesk managers and they all agree they do not mind seeing the NRAO departments if there were logged in as ADMINS. However, Claire brought up that if an NRAO ADMIN is logged in, they can see all the EA and EU tickets.
    - ▪ ACTION ITEM: The ARC Managers will need to take this to the SciOps IPT and ask the other ARC managers if this setup is agreeable. May require a policy change…
    - ▪ ACTION ITEM: Helpdesk Managers want a report on the implications for the EA and EU ARCs with the integration – set of bullet points describing these implications.

- o AOB?
    - o Spring 2013 in Charlottesville (home of Thomas Jefferson)
        - ▪ Maria wants Burgers
        - ▪ Suzanna wants a mansion with a view of the Blue Ridge Mountains
        - ▪ Show Akiko and Kazuya Edgar Allen Poe's dorm room.

Pending Items (Not currently on Agenda):
- o Overall helpdesk health and performance - lessons learned over the last year
- o Review of action items from last several telecons
- o Review of existing workflow
    - o Update documentation – Remijan review of the Pan-ARC staff guide/NAASC staff guide
    - o Make sure the JAO has an up-to-date emergency contact page and they actually answer the phone and take the cell phone with them before the Cycle 1 CfP. Once we get the list of the people, need to make sure that they actually know about it and what they are expected to do.
- o Plans for improving

- o Staff training
- o User training/interaction with the SP working group
  - ▪ Why the hell is there an eNews article on finding collaborations at the JAO for Cycle 1?
  - ▪ ACTION ITEM: Maria to check Herschel tickets submitted during Cycle 0, 1, etc…
  - ▪ Not worried about the # of tickets…the main reason why we may not be getting tickets is people are searching for help outside the helpdesk. As we keep going forward, getting a younger crowd using different facilities, the numbers may increase. As we move to more data reduction, certainly the numbers will increase.
- o Reporting

*Workflow for Tickets Submitted to CRSC (major requests ONLY)! All minor requests should go through the Ph2 ticket and the Contact Scientist (Phase 2 processes and change requests procedures):

Ticket Submitted

NA, EA Workflow

EU Workflow

Triage review all fields are populated.

If NO, Triage communicate back to user.

If YES:

Triage (Sci Staff) review all fields are populated.

If NO, Triage communicates back to user.

If YES:

Ticket is assigned to the contact scientist and is placed in the CRSC department.

Upon Resolution, the CS informs the user on the decision.

Triage puts ticket in CRSC department and informs both the CS, user and P2G as to the resolution.

Working Group Approvals:

_____ **Anthony Remijan (NRAO)**

_____ **Maria Diaz Trigo (ESO)**

_____ **Suzanna Randall (ESO)**

_____ **Akiko Kawamura (NAOJ)**

_____ **Kazuya Saigo (NAOJ)**