Kayako 4.0 Helpdesk Upgrade Questionnaire Form 1: Users

NAME ________________________________ ROLE: USER

To submit helpdesk tickets you can access the helpdesk directly at:

https://kayako-test.cv.nrao.edu/

NOTE: Due diligence needs to be done here on behalf of the user to make sure that the functionality that is already present in v3.0 is also there in 4.0.

1. Were you able to login to the helpdesk as a USER after authentication? If not, what happened, who did you contact and what was the solution?
2. Without submitting a ticket, "mouse" over the helpdesk departments and comment on the following:
   a. Are the new departments descriptive in their scope and functionality?
   b. Are you able to find the right department to submit your question?
   c. Do the tooltips provide enough information as to where to submit your ticket?
3. When you tried to submit a ticket, did you see additional fields to the some of the HD categories that were available in v3.0? Were any additional fields missing?
4. Knowledgebase: The Knowledgebase can be accessed via a hyperlink that can be found in the middle of the login page. If there are existing KB articles relevant to your to question, were they suggested as you typed in your ticket description? Were the KB categories clearly visible and apparent? Any other comments?
5. After submission, did you get a notification with a ticket ID assigned? Were you able to access your ticket from the link provided in the notification?
6. Were you given notification that your ticket was resolved and that you needed to change the ticket status to "CLOSED" if the reply resolved the issue? Did you have any problems with the notifications or with changing the status of the tickets?
7. All custom fields should be filled out and updated (clicking "update" button, not "submit"). Do they update as expected?
8. Attach a file to the ticket. Does it attach properly?
9. Add CC: recipients. Do they receive email notifications associated with this ticket?
10. Any other problems/comments/questions/suggestions?

Summary of USER replies:

1) No tooltips – ***this needs to be added separately and will need testing.***
2) Not able to search KB articles "on the fly". For some reason the search options were not looking at all the imported KB articles. ***It was only searching the new ones posted during the test. This needs to be fixed and tested again.***
3) The link to the ticket in the reply email is not active – ***need to make it active.***
4) The text of the reply emails contain too much "metadata" on the ticket. That should be removed for just a subset. Also, the ticket response should be at the top of the email not the bottom.
   a. Question for WG – Should we omit the text of the reply altogether and only include the active link to the ticket in the email? What metadata should persist in the email notification?

5) Notification emails did not say to change the ticket status. ***This is PROCEDURAL and will be included in the pre-defined (now called macros) replies.***

6) For the proposal change request custom fields:
   a. They say all are “required” but can submit without them all filled in.
   b. Need to be hidden if you are not asking for a change request!
   c. Can edit the fields even if you are submitting to another subcategory (will be fixed if they are hidden)
   d. Should this be its own department? Don’t think so but up for discussion.

7) When sending a reply, need to first change the status to closed, type in the reply then send. If you send a reply and then change the status to closed, you need to update the ticket for it to register ***– I think this is correct procedurally.***

8) For General Inquiries, there was a recipient’s field in version 3 that is no longer there in version 4 ***– need to add that back into 4.0.***

9) Eliminate the “voting” on KB articles ***– it seems to be confusing and is really unnecessary.***

10) Eliminate the ability for users to comment on tickets. Something that we took out in 3.0 but is back in 4.0.

11) You cannot edit the custom fields of a ticket and then send the reply. The text is not updated. You must first edit the custom fields, update the ticket then post the reply.
   a. Question for WG – Omit the possibility of a user “updating” tickets. If they edit the ticket at all, it should be in the post reply stage. Besides USSs are NOT getting alerts when tickets are updated.

12) Check all fonts and images on the landing page for clarity and relevance – get rid of “powered by Kayako”, etc…

13) Need to make sure that the “SEND” button is more visible after hitting “POST REPLY”.

14) Data reduction department should not require a CASA version for submission. You could have a general data reduction question and not be using CASA.

15) For the f2f visitor department
   a. Entering the dates in the wrong format should give a clearer message as to the error.
   b. Non-sensical dates are still allowed to be entered – should we NOT allow this?
   c. Question for WG – should we change the date format to something less US-centric?
   d. Clearer description should be added to the f2f department that it is not just when you are ready for a visit.

16) Text on the tickets page is too big!
   a. Should we hardwire smaller font on the page or advise people to change their zoom settings?

17) Changing the user password didn’t work

    a. ***This should happen at the SP level and is not part of the HD database. Kelly can confirm this.***

18) Every time a ticket was closed an email was sent asked to fill out a survey. ***Question for WG – should we turn this off completely?***

19) Change text of the reply to not include the term "agent"

20) For News items – change text from "nothing in this view" to "contains no content". The implication is that there is another view that may contain content.

21) New user accounts imply the user has a PhD. Should change this default

    a. ***May only be part of the Kayako user database. In fact we pull from the SP database do this may not be an issue – Kelly will confirm.***

22) I tested changing my time zone / DST preferences and it seemed to work. But why does Michigan have its own category? Do people in Michigan not know what time zone they belong to? And what in the world is time zone Pacific-New? ***– Can/Should we edit this at all?***

23) The CC option on adding users to a ticket is not available to users. ***This needs to be added.***

24) In the *user interface*, when I do a query for information, the list of KB articles is formatted nicely, but the ticket list is not formatted nicely. ***Further information is needed on what "formatted nicely" means.***

25) In the *user interface*, when a reply is made to a resolved or pending ticket, the ticket status does not change. I think the ticket status should, by default, change to open. ***This needs to be changed.***

Kayako 4.0 Helpdesk Upgrade Questionnaire Form 2: User Support Specialists (USS)

NAME ________________________________ ROLE: USS

To answer tickets, testers with the USS or Triage role assignments should log into the helpdesk system at:

https://kayako-test.cv.nrao.edu/staff

NOTE: Due diligence needs to be done here on behalf of the staff to make sure that the functionality that is already present in v3.0 is also there in 4.0. Discuss with your local HD manager the activities they would like you to test.

(a link will also appear in the body of the ticket notification that you receive with each submitted/assigned ticket). Your helpdesk system administrator will have set up the username and password for each staff account (USS or TRIAGE). If you have not received an email with your username and password by the start of the test, contact Kelly Sharp (ksharp@nrao.edu) immediately.

1. Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator? If not, what happened, who did you contact and what was the solution?
2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? Did you see the additional fields to the some of the HD categories that were available in v3.0 in the staff view of the ticket? Were any additional fields missing?
3. Did the set up the appropriate alerts as described in the HD staff guide for a "USS". Did the alerts work which notified you of a submitted ticket, note added, etc…? If not, was it clear how to change the notifications?
4. Follow the "Procedure for responding to Tickets - USS" in Section 8 of the Helpdesk Staff Guide in answering the submitted ticket.
    a. Did the workflow in Section 8 work as expected in answering a ticket? If not, what was not clear?
    b. Did you return any tickets to Triage? If so, did you include a note as to why? Leave some notes on a ticket. Exercise the "Note type" and "Visible to" fields. Are they accessible to staff as expected?
    c. Did you need to forward a ticket to someone not in the helpdesk system? If so, did it work as expected?
5. Submit a Knowledgebase article as a DRAFT. Were the instructions clear?
6. Did you enter any predefined reply to a ticket? Did you add any predefined reply for future use?
7. Did you change any message/ticket filters? Did they work as expected? Did you try to sort/organize by the column entries? Did they sort as expected?
8. Did you receive notification when a ticket was "updated" by the user and not "post reply"?
9. Any other problems/comments/questions/suggestions?

Kayako 4.0 Helpdesk Upgrade Questionnaire Form 3: Triage Staff

NAME ________________________________ ROLE: TRIAGE

To answer tickets, testers with the USS or Triage role assignments should log into the helpdesk system at

https://kayako-test.cv.nrao.edu/staff

NOTE: Due diligence needs to be done here on behalf of the staff to make sure that the functionality that is already present in v3.0 is also there in 4.0. Discuss with your local HD manager the activities they would like you to test.

(a link will also appear in the body of the ticket notification that you receive with each submitted/assigned ticket). Your helpdesk system administrator will have set up the username and password for each staff account (USS or TRIAGE). If you have not received an email with your username and password by the start of the test, contact Kelly Sharp (ksharp@nrao.edu) immediately.

1. Were you able to login to the helpdesk via your TRIAGE account set up by the helpdesk administrator? If not, what happened, who did you contact and what was the solution?
2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? Did you see the additional fields to the some of the HD categories that were available in v3.0 in the staff view of the ticket? Were any additional fields missing?
3. Did the default alerts work which notified you of a submitted ticket? If not, was it clear how to change the notifications?
4. Follow the "Procedure for responding to Tickets - Triage" in Section 6 of the Helpdesk Staff Guide in answering/assigning the submitted ticket.
    a. Did the workflow in Section 6 work as expected in either assigning or answering a ticket? If not, what was not clear?
    b. Were any tickets returned to Triage from a USS? If so, did the tickets include a note from the USS?
    c. Did you need to transfer (or did you receive) a ticket to another ARC? If so, did the tickets include a note from the USS?
5. KNOWLEDGEBASE ARTICLES: Periodically, you should check to see if there are any draft Knowledgebase articles awaiting review. Edit the KB article accordingly (if needed) and then change the status of the article from DRAFT to PUBLISHED. Did the articles appear in knowledgebase?
6. Did you enter any predefined reply to a ticket? Did you add any predefined reply for future use?
7. Did you change any message/ticket filters? Did they work as expected? Did you try to sort/organize by the column entries? Did they sort as expected?
8. Are triage staff getting notifications of changes to custom fields (when user is using "update" not "submit")?
9. Leave notes, are notes visible as expected?
10. Try CC'ing users on replies. Are they receiving the reply in their email?
11. Any other problems/comments/questions/suggestions?

Summary of USS/TRIAGE replies:

1) USS Should NOT be able to transfer tickets to other Executive departments **–** needs to be corrected! Also it is important that when transferring to another ARC the ticket is 'unassigned' - otherwise messes ensue e.g. with the alerts. Is there a way to force this? ***This is TOP priority and must be fixed before deployment.***

2) The Notifications for each staff member should be set up by local admins in order to avoid confusion. ***Question for WG – should we hold a tutorial about setting up notifications? Also, should Kelly look into scripting individual notifications for each staff member and their role?***

3) There is now a two step process in adding a note, changing ticket types and moving department/switching ownership of a ticket.

a) ***Can we revert back to doing this all in one step or change the procedure in the staff guide?***

4) Forwarding tickets does not show up in the audit log **–** ***can we change this?***

5) Predefined replies are now called “macros” **–** ***can we change the name back?***

6) Alerts are now called “notifications” **–** ***this new name seems to be okay. Any other comments from the WG?***

7) When you set up the notifications, you can’t tell which ones are set up. ***After you “enable” the checkbox and apply that notification, the check disappears. That should persist.***

8) Cannot actually sort effectively on any column. Multiple sorts on a particular column reduce the number of entries. A sort followed by a search also does not work properly. ***This seems like a bug that needs to be fixed.***

9) “Full name” should be changed to “Reporter” **–** ***Kelly can we make this change?***

10) “User” should be added to one of the column options. ***- Kelly can we make this change?***

11) Should we remove the ability for users to “update” tickets only post replies? ***– Question for WG.***

12) Eliminate the user tab from the USS/Triage view. **–** ***Kelly to remove this tab.***

13) Change the font color on the “Closed” background to Yellow. Change the font color on the “On Hold” background to black. **–** ***Kelly to make this change.***

14) Need the ticket text and title available to a USS when posting a reply to a ticket. Try to cut down on the extraneous white space on the ticket reply. **–** ***Kelly is this possible?***

15) Email notifications should be sent as plain text without a lot of html encoding but an active link to the ticket should be included. **–** ***Kelly is this possible?***

16) Make sure that any note added to a ticket does not have limited visibility. That is, all ticket notes should be visible to all USS. ***Question for WG – take away the option altogether or put it in the staff guide as a procedural issue?***

17) Only the most recent reply was sent as a forward. You no longer have the option to paste the entire thread of a ticket when forwarding a ticket. ***Kelly is this an option to set in Kayako?***

18) USS should not have permissions to publish KB articles. ***Needs to be set up correctly.***

19) Not all browsers are "supported" when viewing tickets by a USS. ***Question for WG – procedurally, we should recommend using firefox or IE8. Should we have Kelly looking into why some browsers don't work?***
20) Add multiple locations for the Staff guide –***Question for WG – this is just a recommendation, where else should we post it?***
21) Last replier of a ticket should NOT become the owner of that ticket unless the ticket is unassigned. ***Question for WG – is this what we want procedurally?***
22) Some USS had problems adding CC's on their replies (Hale, Kazuya). ***Make sure that is really not working because most other's praised that feature.***
23) Need a "close out" timer so USS/Triage are not constantly logged into the systems. ***Question for WG – how long should that be? 1hr? 2hrs?***
24) Eliminate the options of users commenting on KB articles and voting on article "usefulness". ***– Kelly is this possible?***
25) Which columns should be present in the USS/Triage "global" staff view. ***– Question for WG.***
26) There is a noticeable "Surrender" button in the staff ticket interface. It appears to simply un-assign the ticket. I think it would be more appropriate for USS to move the ticket to the return to triage department if they want to surrender it. Need to make this edit procedurally but it may also be good to eliminate the following options: Chat, Trash, Surrender, Take, Dispatch, Spam and Flag. The trash button completely removes a ticket, i.e. also deletes it from the User view. Do we really want Staff to be able to do this? The only time I think this is useful is for tests, so maybe this should be restricted to Admin/Triage. ***– Kelly what is possible to remove for clarity purposes?***
27) In KB articles, hyperlinks should be made blue with an underline. ***– Something that can be scripted or needs manual updates?***
28) KB article creation and updates should produce notifications. It would be nice if there were notifications available for KB article changes. ***– Kelly can we make this change outside of Kayako?***
29) Notifications contain a lot of metadata. I like this, but I would prefer that the new text content (user reply, staff reply, note) be inserted above the metadata. I would also like the originator of the notification (the person who posted the reply, note, or made a change) to be explicitly identified in the email metadata; currently I have to look at the "From:" tag of the email to see who wrote the reply. ***– Question for WG what metadata should be included?***
30) USS received an email notification for tickets that I did not have permission to view. (e.g. Anand from Suzanna Randall, Sept 14 5:23 EDT) ***– Procedurally, need to set up notifications for your executive only.***
31) The "Tag Cloud" in the left side-bar is useless so far as I can tell. Unless there are some guidelines on how to set tags, I would prefer that this feature be removed. ***– Kelly is this possible?***
32) The 'Status changed' pop-up that we had for Kayako 3 doesn't appear. Need to add that back in "Did you remember to change the status"? ***– Kelly is this possible?***

33) is there any way of getting a legend/tooltip for the various symbols associated with tickets in the overview table? – ***Kelly is this possible?***

34) there is no 'back' button, e.g. to take you from a detailed ticket view back to the ticket overview table having to press the tiny 'update' button for everything is annoying and not obvious. – ***Kelly is this possible?***

35) the 'send' button when you reply to a ticket should be more obvious and also appear below the reply contents box – ***Kelly is this possible?***

36) Need to move the "next page" link on the USS view to the top of the page as well as the bottom. – ***Kelly is this possible?***

37) as in Kayako3, if you hit 'Reply' any notes vanish from the screen. – ***Kelly can we make this change to have the notes visible when posting a reply?***

38) From EU/EA staff - in the 'departments' box I see all departments, including NRAO. I would prefer to only see the EU departments. ***– Kelly is this possible?***

39) how do we want to deal with the priority flag? Do we want staff to be able to set this? What do the priorities mean for our workflow? – ***Question for WG – eliminate these flags?***

40) as a user I lost the ticket I had wanted to submit by pressing the 'Search' button – this Search button is too prominent! – ***Kelly can we make the search button less prominent from the user view?***

41) user should only be able to change ticket status to 'closed' or 'open', they should never need to do anything else ***Kelly can we make this change?***

42) Randall - I had some (e.g. HZY-747-45542) tickets go from 'Resolved' to 'Response Overdue' - this should not happen. ***- Kelly can we check this setup?***

43) I am not sure we want the new option of sending notes to users - when would we ever want to do this? ***Notes should only be for interaction between staff, and replies go to users. Agreed but for discussion in WG.***

44) tickets that I put in 'Transfer to NA' should disappear from my queue, at least on one occasion (NPE-775-51064) they did not... ***Procedurally, they should stay in your view/queue until they are assigned to a NA department.***

45) Start the numbering of tickets sequentially as in Kayako 3.0. – ***Kelly is this possible?***

46) I like the Dashboard to show the status of the ticket instead of the tickets that are "Overdue" in time. It is possible for a ticket to have a timestamp that is "overdue" but the ticket status is not updated accordingly. – ***Kelly can we make that change in the dashboard and in the ticket status?***

47) There are a huge list of "reports" on the right hand side of the page for each staff member and the number of tickets they are assigned. ***Can we get rid of that grocery list?***