

Report on the ALMA Helpdesk from the 3rd Integrated Test (IT3)

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Summary

The helpdesk was opened for testing and operations starting at the beginning of IT3 on January 5th, 2011. The helpdesk was used only during Part 1 of this test, during the “Proposal Generation and Submission” portion that took place January 5th-28th. The helpdesk was officially closed for ticket submission by the IT3 participants after the first load test on January 31, 2011. This was done to enable the test results to be collated and implemented so that the helpdesk could be deployed by March 1st, 2011. All of the requisite changes, enhancements and upgrades to the helpdesk and helpdesk operations were discussed during weekly telecons of the ALMA SciOps Helpdesk Working Group. Decisions were made in these telecons whether to approve or not approve the suggested changes from the IT3 report.

Unlike the previous Integrated Tests, the helpdesk testers did not have specific tests to perform or a test matrix to fill out. Instead, the plan was for all testers to use the helpdesk during their proposal preparation and submission testing, much as they would as ALMA Early Science proposers; these testers are called “Users” in this document. As feedback, we requested that these testers fill out a form specifically tailored for users. All the results are posted in Appendix A at the end of this summary. Aside from this, individual tests of helpdesk operations were performed by select users from each ARC in the Proposal Submission Emergency test.

Some IT3 testers (generally those affiliated with an ARC or ARC node) were given the role of “User Support Specialists” (USS), and were responsible for answering the submitted tickets. These testers followed the guidelines for helpdesk operations laid out in the Helpdesk Staff Guide (v2.0, available at <https://safe.nrao.edu/wiki/bin/view/ALMA/Helpdesk>). This guide describes policies, procedures and workflow that are in place for the ALMA helpdesk. Testers with the USS role familiarized themselves with these policies and followed the expected workflow as they answered tickets, including requesting more information from submitters, transferring tickets they were unable to address, and, when appropriate, generating “Knowledgebase” (KB) articles for the benefit of other users. As feedback, we requested that these testers fill out a form specifically tailored for USS. All the results are posted in Appendix B at the end of this summary.

Finally, a third group of testers were given the role of “Triage” staff. These individuals monitored tickets as they were received at each ARC and followed the instructions for assigning, resolving, transferring, etc., the tickets, as described in the Helpdesk Staff Guide. We requested that these testers fill out a form specifically tailored for Triage. All the results are posted in Appendix C.

A table of all IT3 participants and the roles they assumed is provided in Appendix D. (Note this does not include the 6 accounts setup for internal testing purposes.)

During helpdesk operations, 97 tickets were submitted, 39% to NA, 9% to EA and 52% to EU. No tickets were lost and all were assigned and subsequently resolved and closed.

Overall, the IT3 helpdesk test was a successful confirmation of the procedures outlined in the staff guide distributed to all ARCs and the JAO.

In addition, there were changes to the overall look of the helpdesk and procedures for replying to tickets. A summary of these changes are listed below.

Tests and Changes for IT3

There was one notable exception in the procedures described in the Helpdesk Staff Guide. This concerned tickets reporting bugs or enhancement requests for software tools, such as the Observing Tool (OT), Splatalogue, the CASA Simdata task, or the Helpdesk system itself. Currently, the Staff Guide says that in these cases, USS's should open a ticket in the corresponding Defect Reporting system for each tool (e.g. JIRA). Instead, it was decided in the course of this test, that USS and Triage staff should route the tickets as follows:

- OT: transfer to EU ARC; Triage assigns to Andy Biggs
- UP: transfer to EU ARC; Triage assigns to Stephane Leon
- Simdata: transfer to NA ARC; Triage assigns to Remy Indebetouw
- Splatalogue: transfer to NA ARC; Triage assigns to Robin Pulliam
- Helpdesk: transfer to NA ARC; Triage assigns to Anthony Remijan

That is, tickets were assigned to the subsystem scientist of each software subsystem. The result of this was that some ARCs had a specified lead for a software subsystem, e.g. OT or Splatalogue. Bugs, enhancement requests or system errors were forwarded to the lead who then determined if a JIRA should be submitted.

Result: This procedure worked well and will continue through normal helpdesk operations. In specific cases determined by the subsystem scientist of each software system, select USS may be given access to the appropriate bug reporting system.

The overall number of departments was decreased from IT2. In addition, "Tooltips" for each new department were added to describe its scope.

Result: All tickets were assigned to the appropriate department. None had to be "reassigned". Reassignments were only done if a ticket was transferred to another ARC.

KB articles were added by scientific staff based on submitted tickets. The procedure was that first all KB articles be vetted by select scientific staff from each ARC before being published.

Result: While there were still some inconsistencies in the way the USS submitted KB articles, i.e. some went to draft, others published straight away, the overall opinion was that those that did not set the article to draft first, did not follow the instructions in the staff guide properly. "Draft" is and will remain the default setting for the submission of KB articles when the helpdesk is open for full operations.

A "Proposal Submission Emergency" department was added 24 hours before the proposal deadline. Available to all ARCs, this department was manned for the full 24 hours through the proposal deadline. **(SEE APPENDIX E for updated Document)**

Result : The JAO created a wiki page with a contact person who would be available in case of an emergency. In every case, (7 emergency tickets were submitted across 8

hours), Triage from each ARC was able to contact the JAO within minutes of receipt of the ticket. Contact with the JAO representative was through phone, email and forwarding the ticket through the helpdesk. A transcript sent from the JAO representatives who participated in the emergency testing procedure is below and comments from the authors of this document are added (*in italics*):

Comments and suggestions on JAO Emergency Call Test

Stephane Leon & Juan Cortés

We performed a JAO Emergency Call test with the Helpdesk and ARC people. The test showed us the following lessons that need to be implemented for the future JAO Emergency On-Call system. These lessons are the following:

1. Murphy's law works always! For example, a phone call can accidentally be missed by pressing the wrong button on the phone (not a joke).
2. We will have a list of persons with a shift of 6~8 H in stand-by. Will the people at the OSF participate to these turnos? (*Currently: TBD*) We will need a minimum of 4 people for 36 hours.
3. We will need a list of phone number here at the SCO to call to the right person in case of problem (CIPT, archive, web server). It would be even better to have a troubleshooting list (server down, archive not working, power cut, etc...) with the persons to contact.
4. If we are going to use cellular phone, we need to have one from ALMA. We won't call back to a foreign country with our cell phone. (*Currently: Pending*)
5. We may need to explain, even quickly, to the astronomers at the DSO what the purpose of such task is and how we are supposed to act.
6. We could have a backup number to the Emergency Call, i.e. a backup person in case the other does not answer. It would mean that 8+ persons would be necessary to cover 36 hours. But I guess we could use the people at the OSF as well. (*Currently: TBD*)
7. We found that for this test the notification from the ARC messages fail sometimes. We will need to test the system first between ARCs and JAO. (*Currently: It was determined that messages forwarded from the Kayako system were being flagged as SPAM when received in Chile. This issue has since been resolved.*)
8. It is not clear the way for contacting the ARCs from JAO. We need a contact person at the ARCs in order to notify the status of the problem. Thus, we need an expedite channel of notification when a problem is detected at JAO (*Currently: TBD*)
9. We need a clear internal (Science (PHT) > IPT > IT > Archive) procedure in case of emergency. (*Currently: TBD*)
10. In case of catastrophic failures (e.g. Archive down) we need contact person or email list at each ARC in order to notify the problem and avoid unnecessary calls to JAO. (*Currently: TBD*)

Summary of Feedback – USERS

From the questionnaire form (see Appendix A):

- Question 1. All 71 users were able to log in effectively. There were no issues

- Question 2. In general the departments were descriptive enough for people to submit their tickets but the descriptions in the inline text and tool tips used too many abbreviations and acronyms.
 PROPOSED CHANGE: Eliminate the abbreviations and jargon in the tooltips.
(Approved)
 The text of the tool tips was also too short.
 PROPOSED CHANGE: Expand the description of each department. **(Approved)**
 Finally, every department needs to have a mouse-over tool tip. **(Approved)**
- Questions 3. The knowledgebase worked as advertised but many people did not find an answer to their questions because the KB lacked the requisite information. As a result, a couple of people reported not being able to see the suggestions as they typed their questions.
 PROPOSED CHANGE: KB searches crawl the body of the article and not the title so it is imperative that the body of the KB article includes all the words that are in the title as well. **(Approved)**
 If we are going to use the “stars” reporting system, they should also note how many votes were cast. **(Not Approved)**
 It was also suggested that the KB articles were geared more towards testers than actual observers and this may be a problem going forward.
 PROPOSED CHANGE: All KB articles will be vetted by the scientific staff before going live on March 31. This will ensure their usability in full helpdesk operations.
(Approved)
- Questions 4-6. 33 users submitted a total of 97 tickets. Only 1 user reported not getting any notification that their ticket was submitted and subsequently assigned and resolved. Everyone else got notification that their ticket was submitted successfully and was able to follow the link provided to view their ticket upon login.
 PROPOSED CHANGE: It was also suggested to use English only in the notification.
(Approved)
- Question 7. The replies were almost 50/50. Most users replied they did not get a notification to change their ticket status from resolved to closed. However, we believe that this was because the line of text in the email was not prominent enough.
 PROPOSED CHANGE: We will make the “close the ticket if you believe the issue has been resolved” text in the reply of the ticket more prominent. **(Approved)**
- Question 8. Some suggestions/comments/questions included:
 - a. Changing the names of the ticket IDs from random to incremental. **(Approved)**
 - b. Change the name from tickets to queries. **(Not Approved)**
 - c. Make sure the ticket link is in each response to that ticket. **(Approved)**
 - d. Allow closed tickets to be seen by the user. **(misinformed; users can already see all their tickets regardless of status)**
 - e. Make sure cookies are enabled in the browser. **(reported in published KB article #41 in current helpdesk)**
 - f. If you attach a file to a ticket, you do not get notified if it attached successfully. **(File size is a problem, as well as notification; actively being worked on.)**

Summary of Feedback – USS

From the questionnaire form (see Appendix B):

- Question 1. All 40 USSs were able to log in effectively. There were no issues.
- Question 2. In general, the departments were adequate but in the view, they are too

long to be seen and the categories below cannot be selected. One USS attached a file that was not viewable by the user.

- Question 3. No problems.
- Question 4. If there were problems in the workflow, it was because the USS did not read the staff guide. This was the impression from the triage staff and was noted by several USSs as well.
 - PROPOSED CHANGE: Additional USS training is necessary at each ARC before going live on March 31. **(Approved)**
- Question 5. 8 of 40 USSs submitted KB articles; all 8 said the guide was clear. 14 KB articles were produced. Only one USS commented on the instructions being not clear and only one USS commented that they did not know to submit the article as “draft” but also admitted to not reading the staff guide.
 - PROPOSED CHANGE: Additional USS training is necessary at each ARC before going live on March 31. **(Approved)**
- Question 6. Some suggestions/comments/questions included:
 - USSs have too many permission, like being able to reassign tickets.
 - PROPOSED CHANGE: Edit Kayako permissions for USS.
 - The USS’s permissions cannot be changed in Kayako without major reprogramming of the software. **(Not Approved)** *It is essential that the USS follow the guidelines of the workflow.*
 - There was no message that a file was attached to a ticket.
 - PROPOSED CHANGE: Attachment is visible through the Kayako Web view, but not through email alerts. Is it possible to edit the email alert to note that a file is attached? **(ACTION PENDING)**
 - Add a pop-up to the tab headings for “Post Reply”, “forward”, etc...that describe their scope.
 - *Requires significant changes to Kayako; not being pursued.* **(Not Approved)**
 - The “view all” ticket option did not work, as reported by select USSs.
 - *This was because the USS changed the view in a department.* **ACTION:** *This clarification has now been added to the staff guide.*

Summary of Feedback – TRIAGE

From the questionnaire form (see Appendix C):

- Questions 1-3. All 8 triage staff were able to log in effectively. There were no issues
- Questions 4-6. Some of the workflow needs to be refined as to what happens to a ticket that has already been assigned to a USS but the user is sending a comment back to Triage and what prevents a USS from posting a reply to a ticket not assigned to them. These are procedural and not something that has to be implemented in the Kayako system.
 - PROPOSED CHANGE: Additional USS training is necessary at each ARC before going live on March 31. **(Approved)**
- There were also no real problems transferring tickets between ARCs from Triage. There were some issues regarding the transfer of a Japanese ticket.
 - PROPOSED CHANGE: Edit the staff guide with clearer instructions on the action needed with the transfer of a Japanese language ticket. **(Approved)**

Summary of Actions to be taken for Final Deployment:

A link off the science portal webpage will be added that will take you to the KB articles of the helpdesk where it is not necessary that you first login. This is so the general public can look at the KB articles without actually registering.

How does the PHT correspond with the ARCs?

Workflow will be decided at a face-to-face meeting in April, 2011.

What happens if the UP goes down? What is the contingency and how is it reported by the users?

In this case, the other science portals at the ARCs will activate and the helpdesk will be available outside of the ALMA science portal through the ARCs.

How do users learn to use the helpdesk?

Descriptions of helpdesk operations are included in the "Guides to the ARCs," available under "Documents & Tools" in the science portal.

Appendix A:**Helpdesk IT3 Questionnaire Form 1: All Users**

NAME _____

ROLE: USER

To submit helpdesk tickets, testers must first register for with the ALMA User Portal (instructions on IT3 test page). From there, they can access the helpdesk from a link, or at any time may reach it directly at:

<https://alma-help.nrao.edu>

(a link will also appear in the body of the ticket notification that you receive with each submitted/assigned ticket).

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 new 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. 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? Any other comments?
4. 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?
5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?
6. Interaction with helpdesk staff: did this proceed as expected?
7. 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?
8. Any other problems/comments/questions/suggestions?

INDIVIDUAL REPORTS from USERS:

1. Yes, I have found no problems everytime I logon to the system (either directly in the helpdesk page or through the UP).
2. Yes, I think so
3. Yes, while I was writing my ticket articles were appearing and disappearing below.
4. Yes, I received an e-mail confirming the submission of the ticket. The link pointed to the correct ticket.
5. Yes, i got an answer in about a day
6. Yes, it was OK
7. Yes, there is a line about that at the end of the response e-mail (after the link to the ticket), but not in the ticket itself as seen in the Helpdesk.
8. No, I have found it very easy to use and responses have been quick and concise. :)

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?

Yes.

2. Without submitting a ticket, “mouse” over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

Yes

b. Are you able to find the right department to submit your question?

Yes

c. Do the tooltips provide enough information as to where to submit your ticket?

Yes.

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

Yes. I got some suggestions

4. 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?

Yes, I got a notification and was able to access my ticket.

The notification was written in Japanese. This would be because I selected my local ARC as EA, but astronomers in Taiwan are also supposed to submit ticket to EA ARC. Therefore it would be good to use English in the automatic notification.

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Yes.

6. Interaction with helpdesk staff: did this proceed as expected?

Yes.

7. 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?

No, I got no notification from the helpdesk. My question was about one option of the target list in

OT, and the answer was “that option is not available yet”. So I understood the situation and CLOSED my ticket 10days after the submission. Did I have to wait the notification to change the status?

8. Any other problems/comments/questions/suggestions?

No.

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?

I was able to login.

2. Without submitting a ticket, “mouse” over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

Yes

b. Are you able to find the right department to submit your question?

Yes

c. Do the tooltips provide enough information as to where to submit your ticket?

I didn't test this

3. 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? Any other comments?

Yes, they are quite good

4. 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?

I didn't receive any notification. I had to login on the system to know what was going on.

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

I didn't receive any notification

6. Interaction with helpdesk staff: did this proceed as expected?

Yes

7. 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?

No, I didn't receive any notification

8. Any other problems/comments/questions/suggestions?

No, the system is quite good.

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?

Yes, I was able to login.

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

Are the new departments descriptive in their scope and functionality? Yes

Are you able to find the right department to submit your question? Yes

Do the tooltips provide enough information as to where to submit your ticket?

In 'Data Reduction' I would add in the explanation 'CASA' (I cannot see any explanation for this department and for the 'Archive and Data Retrieval', though the latter does not need extra info in my opinion).

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? Any other comments?

There were KB articles relevant to the question, but they were not suggested while I typed my ticket (they were found though when searched into the KB with the 'search' tool).

I found confusing when I click in KB I see 'ALMA' and below one article followed by 'More topics' and below that another 3 articles that do not seem to have a category (is that left-overs from previous tests?).

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? Yes

Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on? Yes

Interaction with helpdesk staff: did this proceed as expected? Yes

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? Yes

Any other problems/comments/questions/suggestions?

1. I was able to login to the HelpDesk with no problems.
2. a) **Every** category should have mouse-over text; e.g., Data reduction mouseover should specify CASA. There should not be acronyms used in the mouse-over text: what the heck is PHT? Also, "Phi" and "PhII" look weird. Who's "Phil"? Just use the extra "ase" for crying out loud!
 - b) As long as I don't need to know what PHT is, I think I can figure out where to submit.
 - c) What are the tooltips? Are you referring to the mouse-over text? If so, see 2a.
3. None of my tickets had relevant answers in the knowledgebase, although I feel like I should have started writing a ticket about Stephanie Meyer just to make sure. If you're going to allow "helpful / not helpful" voting to determine the stars, the Knowledgebase should say how many votes there were.
4. Yes, the notification & link were great.
5. I received quick notification (< hours?) for each of my tickets.
6. One staff member kept coming to my office and telling me that I should or shouldn't submit tickets, according to his mood at the time and how much he wanted me to annoy the person currently on Triage. Will that be standard operating procedure?
7. I received notice in each case, except for the last couple of tickets by Harvey, but the status was changed after the test was done so that probably doesn't count.
8. The ticket identifications are dumb. At the very least, the first three letters, instead of being assigned "randomly" (if they are) could identify to which department a ticket had been submitted! Also, is there a limit of three attachments per reply post? I'm not sure that's wise.

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?

Ans: Yes, no problem

2. Without submitting a ticket, "mouse" over the new 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?

Ans: a. Yes, looks fine.

b. Yes, it works properly

c. Yes, while I suggest to avoid using abbreviations such as PHT, SB, Phi, PhII in the tooltips.

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

Ans: It is good to provide such knowledgeable. While the current categories appear to be designed for testers rather than observers.

4. 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?

Ans: Yes, I did get the notification, and can assess my ticket from the provided link. Actually, in

total I got three mails (w. different ticket IDs) for a single submitted ticket. Also the email was in Japanese.....

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Ans: Yes, I received the response within a few hours.

6. Interaction with helpdesk staff: did this proceed as expected?

Ans: Yes, it is fine.

7. 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?

Ans: No, not received any notification to change the ticket status

8. Any other problems/comments/questions/suggestions?

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?

yes, I have never encountered problems to login

2. Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

yes.

b. Are you able to find the right department to submit your question?

yes. I find a bit confusing that the departments are called "categories" in the "submit a ticket" page

c. Do the tooltips provide enough information as to where to submit your ticket?

yes.

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

No, I have not found any related article...

4. 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?

yes, I got ID YWU-931637. And yes, I could access it from the link provided

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

yes, I got it resolved after just 20 hours

6. Interaction with helpdesk staff: did this proceed as expected?

yes.

7. 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?

No, I just received an e-mail with the answer. Then, I logged into my account and the ticket was

already marked as 'resolved', but I got no notification that I needed to close it.

8. Any other problems/comments/questions/suggestions?

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?

YES but it would be so nice to have single-sign on for all ALMA services!

2. Without submitting a ticket, “mouse” over the new helpdesk departments and comment on the following:

(after clicking on 'submit a ticket', though!)

a. Are the new departments descriptive in their scope and functionality?

Tooltip acronyms are rather opaque, to be honest I would rather have 2-3 lines of text which I can

read all the time than something ephemeral containing acronyms I do not understand (PHT etc.). In

general, vital information should be available in more permanent form than tooltips, which should be

an extra reminder, not the only information.

b. Are you able to find the right department to submit your question? Some confusion as below

c. Do the tooltips provide enough information as to where to submit your ticket? Not really, firstly

because of the confusion with acronyms and the ephemeral nature of tooltips and secondly, supposing I have a problem with proposal submission in the OT, does this come under General Queries, (if I can figure out that PhI manager might include that) or does it come under Observing

Tool, or does it come under Proposal Submission Emergency?

3. 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? Any other comments?

I typed in Observing Tool and did not get anything (although I think that there are OT issues in the

Knowledgebase?). I then tried OT and did not get anything. I wondered whether I should press return to activate this capability and unexpectedly submitted the ticket, so it would be good if there was a slightly harder submission process, like a special button or 'do you want to submit' confirmation. I do like calling it Knowledgebase, though.

4. 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? I did not intentionally submit a ticket within the test time, sorry.

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

6. Interaction with helpdesk staff: did this proceed as expected?

7. 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?

8. Any other problems/comments/questions/suggestions?

Most 'normal' people would understand 'query' better than 'ticket' and it should say 'view your queries' (or tickets) because you cannot see other people's, I think.

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? **NO PROBLEMS**
2. Without submitting a ticket, “mouse” over the new helpdesk departments and comment

on the following:

- a. Are the new departments descriptive in their scope and functionality? **YES**
- b. Are you able to find the right department to submit your question? **YES**
- c. Do the tooltips provide enough information as to where to submit your ticket?

the viewer to select the ticket category does not allow to see the EU EA and NA part. FINE

But it is never stated that the user is tight to use only the corresponding region category.

3. 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? Any other comments? **IT IS NOT STRAIGHTFORWARD TO UNDERSTAND THEIR MEANINGS BUT I ASSUME THIS IS SOMETHING THAT WILL IMPROVE WHEN THE KNOWLEDGEBASE SYSTEM WILL BE 'KNOWLEDGEBASE'**
4. 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? **YES**
5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on? **YES**
6. Interaction with helpdesk staff: did this proceed as expected? **YES**
7. 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? **YES**
8. Any other problems/comments/questions/suggestions?

Here are my responses to the helpdesk questions:

1. I was able to log, I think as a user.
2. The helpdesk departments seemed reasonable. I was able to submit an OT question to the OT department.
3. A knowledgebase article was suggested to me, although it didn't answer my question.
4. I did receive a link that I could access to view my ticket.
5. My ticket was being actively worked on within 24 hours.
6. Interaction with helpdesk staff was lovely.
7. My ticket is listed as resolved, but the OT support weren't sure what was causing the problem. They sent me a workaround to my problem which was fine for the test.
8. When I was notified of an update to my ticket, in some emails the full response was in the email without a link to the actual ticket. If this happens to other users, they will likely attempt to reply to whoever sent them the ticket rather than updating the discussion through the helpdesk. The address, of course, is 'do-not-reply@almascience.org', but if users delete the initial helpdesk emails they could be frustrated in their attempts to respond. I would simply recommend making sure the ticket link is in every email response.

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?

Yes, worked fine !

2. Without submitting a ticket, "mouse" over the new helpdesk departments and comment on

the following:

a. Are the new departments descriptive in their scope and functionality?

Yes. However, three of the departments (categories) do not have a "mouse over" description (the one that pops up on a yellow background).

b. Are you able to find the right department to submit your question?

Yes, most of the time. The 'General Queries' is a good catch-all in case of doubt.

c. Do the tooltips provide enough information as to where to submit your ticket?

Yes, for me this was fine.

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

Some were suggested, but my questions were too specific (and stupid ...) to match any of these. But various KB articles were suggested (up to four at a time), which is a nice feature.

4. 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?

Yes, worked fine.

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Yes.

6. Interaction with helpdesk staff: did this proceed as expected?

Yes.

7. 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?

Yes, but it is the last line in the e-mail, and not very 'visible'. Perhaps this line should be in boldface ?

8. Any other problems/comments/questions/suggestions?

Closed tickets can no longer be seen ! This would be useful even for the user as an archive of tickets !

The helpdesk link *must* be visible from the portal even if the user has not logged in. If he clicks on that link this should take him to the login/register page and then to the helpdesk. I know that's not your "jurisdiction" but I put it here, too, because I think it is crucial

* Please add a prefix to all emails from the helpdesk. That would make them better "branded", easier to recognize and also easier to filter. I would suggest "ALMA helpdesk"

* If the user posts a reply to a ticket, it would perhaps be nice actually to see the earlier exchange on that ticket on the same page (ideally below). I.e. like the staff view when replying to a ticket.

* Maybe it could be nice to tell the user what the Statuses mean. We now have quite some fine-tuned meanings (e.g. "pending" and "on hold"). That could be for example a tooltip on the Status or some text somewhere.

* A very tiny little thing: could EU and EA ARC helpdesk ticket times be show in 24HR notation? (really a very small thing)

* When cookies are switched off in the browser, no login is possible. It would be nice to have a reminder in that case ("WARNING: cookies must be allowed in order to be able to use the helpdesk system")

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?

Able to login.

2. Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

General Queries has too many abbreviations that might not be clear to all.

b. Are you able to find the right department to submit your question?

Yes

c. Do the tooltips provide enough information as to where to submit your ticket?

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

Not followed up. No further ticket submitted so no comments on the following.

4. 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?

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

6. Interaction with helpdesk staff: did this proceed as expected?

7. 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?

8. Any other problems/comments/questions/suggestions?

The back button is not intuitive. ARC logo (EU) is not properly represented (in Firefox)

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? I managed to log in just fine.

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality? yes

b. Are you able to find the right department to submit your question? yes

c. Do the tooltips provide enough information as to where to submit your ticket?

Yes

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 question, were they suggested as you typed in your ticket description? Any other comments? not suggested as I typed, only after hitting search

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? I haven't submitted a ticket

Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Interaction with helpdesk staff: did this proceed as expected?

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?

Any other problems/comments/questions/suggestions? **There is no back-button to get back to the UP!**

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?

yes

2. Without submitting a ticket, .mouse. over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

The categories are fine. The hover help could be improved. Should we have a department for documentation?

b. Are you able to find the right department to submit your question?

Yes

c. Do the tooltips provide enough information as to where to submit your ticket?

I am able to understand where to submit a ticket based on the names of the departments, but the hover help actually confuses the issue a bit by incorporating cryptic abbreviations (PHII, which I know means Phase 2 but general users may wonder) and mentioning esoteric items that general users don't need to see (science assessor ...)

3. 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? Any other comments?

I submitted a question relating to improperly calculated overhead in the OT that was preventing me from submitting one of my proposals. As I typed it I was presented with a few KB articles. One was a reasonable article to read, given my question, but did not actually answer my question.

4. 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?

Yes

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

I got a response from Andy Biggs in a timely manner.

6. Interaction with helpdesk staff: did this proceed as expected?

yes.

7. 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?

yes

8. Any other problems/comments/questions/suggestions?

I find it funny that we refer to USS as "agents" in the emails to those who submit helpdesk tickets.

I'd like to be 007.

1. Yes
2. a,b,c Yes
3. I can't remember. The helpdesk is no longer available to check.
4. Yes. I don't think I tried the link in the email.
5. I think so. It might have been a few hours over on one of them.
6. Yes
7. Yes, on some of them. But some issues were not resolved by the end of the test.
8. I could not attach a 3.8 MB image file. I did not get an error message, it simply never appeared on the ticket. I never heard a response on my suggestion on having another state for tickets that are resolved in principle, but the fix is still not yet implemented. If not the helpdesk software, then what software tool will be used to remind the staff that a resolved ticket still needs work to be done on it?

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?

Yes, I was able to login to the helpdesk as a USER.

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

- d. Are the new departments descriptive in their scope and functionality?

Yes!

- e. Are you able to find the right department to submit your question?

Yes!

- f. Do the tooltips provide enough information as to where to submit your ticket?

Yes, they do. In fact, I have submitted a ticket.

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 question, were they suggested as you typed in your ticket description?

It's true! Typing in the ticket description the Helpdesk shows existing KB articles linked to my question.

Any other comments?

No.

After submission, did you get a notification with a ticket ID assigned?

Yes! I have received the notification.

Were you able to access your ticket from the link provided in the notification?

Yes.

Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Yes, within 48 hours!

Interaction with helpdesk staff: did this proceed as expected?

Yes, as expected.

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?

Yes, I have received the notification on the resolved ticket and on the change of the status.

Any other problems/comments/questions/suggestions?

How I can see all tickets, both my and those submitted by other users? It would be useful!

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?

YES - no problems

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

Yes but there was no department for the Assessor tool issue I had - but I guess that is a staff issue so its ok.

b. Are you able to find the right department to submit your question?

Yes

c. Do the tooltips provide enough information as to where to submit your ticket?

Yes

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

I will be curious to know how this develops over time - with so few tickets and info, should we perhaps seed it with some obvious questions that users might ask - perhaps we can do that for the Train

the trainers exercise on Feb 18?

4. 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?

Yes.

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Yes

6. Interaction with helpdesk staff: did this proceed as expected?

Yes.. except the assessor tool question was transferred to somewhere else (JAO?) and the JAO reply was really not very helpful or descriptive. Perhaps I was not clear in my question so I will try again

7. 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?

Yes

8. Any other problems/comments/questions/suggestions

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?

No problem to login, either automatically from the User Portal, or by accessing directly the Helpdesk site.

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

Are the new departments descriptive in their scope and functionality?

Yes. I'd suggest to have "Data reduction" after "Archive & data retrieval" to reflect the (most logical) chronology.

Are you able to find the right department to submit your question?

Yes.

Do the tooltips provide enough information as to where to submit your ticket?

Not really. They are using terminology that a normal or first time user does not know (e.g. PHT, Ph1 Manager).

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? Any other comments?

Nothing was proposed to me when I submitted a ticket. But since I was reported an error in one of the Helpdesk page, there's no reason an article from the Knowledgebase should have been relevant.

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?

Yes, no problem.

Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Yes

Interaction with helpdesk staff: did this proceed as expected?

Yes.

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?

Yes.

Any other problems/comments/questions/suggestions?

On the home page, the "View tickets" icon is ambiguous: it would more clear to name it "View *my* tickets", and the text below should not mention "submit new ticket", since there is a dedicated "Submit a ticket" icon.

Clicking on the Knowledgebase icon, I get a page that lists a number of articles, but I don't understand why these articles were selected. I have to click on "ALMA" to get a really useful page, proposing to me a series of articles per category (Phase 1 Manager, Pipeline, etc...) Wouldn't it be possible to go directly to that page, without the intermediate, much less useful, page?

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?

YES

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

Are the new departments descriptive in their scope and functionality? YES

Are you able to find the right department to submit your question? YES, but certainly there're missing departments that will have to be added with the true user questions: I'm thinking about questions wrt observing strategies, or hardware related.

Do the tooltips provide enough information as to where to submit your ticket? YES

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? Any other comments? IT seems to work, but not much information for the time being

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? **YES**

Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on? **YES**

Interaction with helpdesk staff: did this proceed as expected? **YES**

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? **YES, but I did not realize until reading this question. This part is too low in the mail. I think it should be before the list of previous mails.**

Any other problems/comments/questions/suggestions?

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? **Yes**

Without submitting a ticket, "mouse" over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality? **No, not very descriptive. Seems to me the short words in the pop-up should appear as part of the department name, and the popup should have more description. When you go to the next level for a category, the help is no longer available - should see what types of queries are allowed on this level too. In fact, for most there should be a drop-down menu to further categorize the nature of the ticket**

b. Are you able to find the right department to submit your question? **Who knows - better way to test this is to ask the triage how often tickets were submitted to the right category**

c. Do the tooltips provide enough information as to where to submit your ticket? **No - what is SB? PHII? Too terse. Terse on the displayed text, more descriptive in the tooltips. There should be a question about the entry forms - were we asked enough information. I fully expected customized entry forms for most of these - e.g. under OT, do we need to know version? Java? Shouldn't there be a way to indicate issues with OT use vs. OT submission/acceptance?**

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? Any other comments?

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?

Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Interaction with helpdesk staff: did this proceed as expected?

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

Any other problems/comments/questions/suggestions?

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?

Yes, this worked fine.

2. Without submitting a ticket, “mouse” over the new helpdesk departments and comment on the following:

a. Are the new departments descriptive in their scope and functionality?

Yes.

b. Are you able to find the right department to submit your question?

Yes.

c. Do the tooltips provide enough information as to where to submit your ticket?

I think that Data Reduction, Archive and Data Retrieval and Proposal Submission Emergency should also have tool tips.

3. 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 question, were they suggested as you typed in your ticket description? Any other comments?

Knowledgebase articles were suggested to me as I typed in the text of my tickets, but they were never useful/what I was looking for (perhaps the relevant articles did not exist or were not properly titled/keyworded). I found the 'Knowledgebase Categories' overview useful, much less so the start page that seems to show only one category (ALMA – really?) as well as the uncategorized articles – uncategorized articles should surely not be possible? Showing the most popular articles on the main knowledgebase page is a good idea though. Searching the knowledgebase worked well for me and gave relevant ticket results.

4. 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?

Yes, this worked fine. However, for the notification mail I would suggest that the sender be identified as 'ALMA – Department' or similar, not just the department. Users might get confused as to who the ticket is from otherwise...

5. Were you given notification within 48 hours after submission that your ticket was resolved or that it was being actively worked on?

Yes, I always got a relatively fast reply.

6. Interaction with helpdesk staff: did this proceed as expected?

Yes, my tickets were assigned to people that replied quickly and often quite wittily! The one thing that confused me was the status of the ticket and when/whether I was supposed to change it e.g. from 'Pending' to 'Open'. As a user, I know that I should close tickets if the matter is resolved, but beyond that I wasn't sure whether to touch the status. Also, I am never sure whether to first reply and then change the status or the other way around. For example, I would sometimes like to close the ticket but send a thank-you to my support astronomer – I suppose I first reply, then close the ticket? This should be made clear in the instructions for users. Is there a manual just for users?

7. 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?

I always got a notification (I think!) when somebody replied to my ticket. The status was not always 'resolved' when it should have been, and I was not normally asked to close the ticket (once or twice maybe).

8. Any other problems/comments/questions/suggestions?

One thing I found annoying was that when replying to a ticket I could never see the entire ticket conversation (or at least the last entry by User Support that I should be replying to). This makes answering several detailed questions difficult and you tend to forget to mention some aspects that were asked.

For one f2f visit request I asked for financial support, but was able to submit the ticket without a justification for this. The justification should be mandatory.

As a test, I tried to submit a ticket with a large fits file attachment (17MB). This did not work, and instead of getting an error message I was taken back to the main Helpdesk screen. The ticket was not submitted. I think that the size limit for attachments should be indicated somewhere and then an error message should be given if the attachment is too large.

I had one strange issue that as a user I could see a ticket submitted by Paola (as staff, and for some reason cc'd to my e-mail address) . The ticket in question is GUJ-188071. Surely, a user should not be allowed to view anybody else's tickets?

Appendix B:**Helpdesk IT3 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://alma-help.nrao.edu/staff>

(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 (Section 1.1 and 5.1)? 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?
3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?
4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.
 - a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?
 - b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?
 - c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?
5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?
6. Any other problems/comments/questions/suggestions?

INDIVIDUAL REPORTS from USS:

Only one comment from the staff point of view: I think the default option to create a filter should be private instead of public.

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution? **I was able to login (but note that I have a triage account, so this may not be tested with my login...)**

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? **Yes, departments were OK.**

Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications? **Yes, this worked.**

Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not

clear? I found that for many USS the workflow did not work as it should. This is probably due to the fact that the staff guide was not read and we (triage) should make sure of giving clear instructions to all the specialists for the workflow. The workflow failed mainly in the status updates: some tickets were never changed to resolved although the ticket was resolved.

Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)? **Yes.**

Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected? I forwarded a ticket to an external account as a test. The e-mail was correctly forwarded. However, it should be made clear to anybody forwarding a message that they should quote the content of the ticket, since the previous conversations do not get automatically forwarded.

If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

Any other problems/comments/questions/suggestions? A USS has too many permissions right now. In practice, the view of a USS doesn't differ from the one of a triage person. While I think that a USS person should be able to see all the tickets if they want and set their views for that, they should not be allowed to re-assign tickets to other USS, or to reply to tickets not assigned to them.

A second issue was that if a USS opens a ticket as a staff (and not as a user), then the e-mail address should be automatically set to their e-mail address.

The quick search for messages does not work.

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? **Yes** 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? **Yes** If not, which departments/forms need improvement?

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? **Yes** If not, was it clear how to change the notifications?

4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

a. Did the workflow in Section 7 work as expected in answering a ticket? **Yes** If not, what was not clear?

b. Did you return any tickets to Triage (Section 7)? **No** If so, did you include a note as to why (Section 6.3)?

c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?

5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

Any other problems/comments/questions/suggestions? **In my limited test this all worked well. Thanks.**

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

YES

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

YES

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?

YES

4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?

YES, but am not so clear on the differences between "resolved" and "closed"

b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?

NO

c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?

NO

5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

YES I did, and YES the instructions were clear.

6. Any other problems/comments/questions/suggestions?

1. Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution? **NO PROBLEMS**
2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?
the viewer is too long to be seen on the screen and the categories below cannot be selected
3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications? **NO PROBLEMS**
4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.
 - a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear? **NO PROBLEMS**
 - b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?
 - c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did

it work as expected?

5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear? **NO, INSTRUCTIONS ARE NOT CLEAR. I NEEDED HELP.**
6. Any other problems/comments/questions/suggestions?
there is no automatic message that a file it is attached. It is not clear whether the operation worked or not.
There is no modification of the screen so the uss cannot know whether the file is indeed attached.

1. Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

Yes.

2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

Yes, all fine !

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?

Yes, this was clear to me.

4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?

Yes, worked as expected.

b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?

I did not. I was too happy getting a ticket assigned to me !

c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?

No, I did not need to do this.

5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

This did not occur in my case (I got assigned just a single ticket).

6. Any other problems/comments/questions/suggestions?

Not at this time.

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

Yes

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

Sufficient

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?

Seemed to work

4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.
 - a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?
 - b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?
 - c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?
5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

Yes, but not tested extensively.

6. Any other problems/comments/questions/suggestions?

1. Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution? **I managed to log in.**
2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? **It seemed fine.**
3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications? **I only got one ticket, but this was fine.**
4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.
 - a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear? **Answering the ticket was fine. The system seems a bit messy, in terms of that there is a lot to click, pull down, etc...**
 - b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)? **No.**
 - c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected? **No.**
5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear? **I didn't do this.**
6. Any other problems/comments/questions/suggestions?

1. Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

yes

2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?

the alerts were fine

4. Follow the .Procedure for responding to Tickets - USS. in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?

It worked fine, but I didn't need to do anything fancy.

b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?

No.

c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?

no

5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

The helpdesk guide is clear, though I did not submit a KB article.

6. Any other problems/comments/questions/suggestions?

I find the helpdesk interface to be very busy and it is not always clear what some of these options do. It's hard to keep all the information in the staff guide in your head, when this tool is not used every day. It would help if you expand on the popup help. For example, when examining a ticket, the popup help on all of the tabs (General, Post reply, forward, ...) only repeats the text in the tab. It would be useful to give a description in the popup help that says when you would want to use this option. Fro example, describe in the hover help the difference between "post reply", "follow up", and "add notes".

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

Yes!

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

Yes, entry forms contain enough information.

Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?

Yes!

Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?

Yes.

Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?

No.

Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?

No.

If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear

I have not used the Knowledgebase.

Any other problems/comments/questions/suggestions?

I have not received the notification of my submitted ticket, only when the status is changed I have received the notification. It would better to know with an alert when I have answer to a ticket.

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution? Yes, this worked fine.

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? This was fine. One user had trouble attaching a FITS file.

Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications? I always seemed to receive an email when a ticket was assigned to me and clicking on the link in the email was a very convenient way of accessing the Helpdesk.

Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear? Only step 1 was ever relevant.

Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)? No.

Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected? No.

If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear? Actually, I didn't realize that I was supposed to create Knowledgebase articles in draft form, but this was my failure to read the instructions carefully enough.

Any other problems/comments/questions/suggestions? The main problem was that tickets would be assigned to me for which I received email alerts, but which could only be seen if I clicked on the link in the email. Logging in directly to the Helpdesk and clicking on 'View All' would not show some of these tickets. I also noted that some tickets were marked as Resolved when they were in fact Open, but I can't swear to this now – this was certainly my impression at the time. However, confusion may have been sown due to the different coloured boxes in the

General tab that would show different statuses. I now know that these different boxes refer to an “escalation” whereby a ticket become overdue and the original blue one is complemented with a yellow one. I’m not sure I like this feature – it’s confusing.

- 1) Yes
- 2) Yes
- 3) Yes
- 4) -----
 - a. Yes
 - b. No
 - c. Yes, as part of triage, and it seemed to work but with the addressee’s spam filter removing the message
- 5) I did not attempt this
- 6) The helpdesk was surprisingly intuitive and easy to use

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution? **YES**

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? **YES**

Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications? **YES**

Follow the “Procedure for responding to Tickets - USS” in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

Did the workflow in Section 7 work as expected in answering a ticket? **YES, we play with the 4 points, and worked well.**

Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)? **YES**

Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected? **NO, but I saw this possibility.**

If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear? **NOT tried, but the instructions seem to be clear.**

Any other problems/comments/questions/suggestions? **NO problems with the initial tests we did. It seems to work well.**

Were you able to login to the helpdesk via your USS account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

Yes, no problems.

2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

Yes, for my needs they were adequate. Users had to be asked for clarification in several instances, but I am not sure that these cases could have been captured by the department forms. Maybe a general instruction to the user to give as much information as possible when submitting a ticket (including attachments, such as the proposal when asking for f2f support) should be given in a prominent place.

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications?

The default alerts did not notify me when I was assigned a ticket, but that may have been due to my triage role. I changed this alert manually, and then I got all the alerts I wanted.

4. Follow the "Procedure for responding to Tickets - USS" in Section 7 of the Helpdesk Staff Guide in answering the submitted ticket.

a. Did the workflow in Section 7 work as expected in answering a ticket? If not, what was not clear?

The one thing that staff users were not clear about in the workflow was which status to change the ticket to after replying. Some forgot, some changed it wrongly.

b. Did you return any tickets to Triage (Section 7)? If so, did you include a note as to why (Section 6.3)?

No, I did not return any tickets to triage but asked several other staff to do so. This appeared to work fine, although the ticket was never reset to 'unassigned' as it should have been.

c. Did you need to forward a ticket to someone not in the helpdesk system (Sections 6.4)? If so, did it work as expected?

I tried forwarding a ticket to Stephane Leon about a submission emergency and he said he never received the mail. Testing the forwarding on myself I found that an e-mail alert was sent, but I could only see the very last reply (i.e. 'I forward you this ticket') but not actually the submitted text. The only way for an external user to see the ticket content is if the USS forwarding the ticket thinks to include the actual request in his 'Forward' reply. This is fine, but it has to be made absolutely clear, if possible by a note/text that appears when you forward a ticket.

5. If appropriate to the question, submit a Knowledgebase article as a DRAFT as described in Section 6.5 and Section 8 of the Helpdesk Staff Guide. Were the instructions clear?

It was not clear to all users that they should submit the knowledgebase article as 'Draft' – some directly published it! I suggest allowing 'Staff' roles only permission to compose draft articles, not to publish them (see my rambling about a greater difference between triage and staff accounts below). I had to tell several staff users how to publish a knowledgebase article, so apparently it was not completely clear to everybody.

I think that the Staff helpdesk needs many more 'hint' or 'tooltip' messages that either pop up when needed or are visible prominently. Many staff will not use the Helpdesk regularly enough to think of everything automatically, so they should be helped.

6. Any other problems/comments/questions/suggestions?

I found that searching tickets by 'Last replier' and 'Observer name' did not work at all. On the other hand, searching by ticket ID or subject worked very well.

If as a staff I want to open a ticket the procedure is not very straightforward.

If I go on 'New Ticket' -> Email I see a number of departments, many of which I cannot submit tickets to (NA and EA departments). The problem is that I can't read the full department name

and therefore have to work out by trial and error which departments I can submit tickets to. I think I should only be able to see departments I can submit tickets to. One other thing is that I get asked for a 'User e-mail'. Upon investigation, it turns out that this is where notifications are sent, so surely it should be the Staff's normal e-mail? In that case, it should be automatically filled (or set as default).

Appendix C:**Helpdesk IT3 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://alma-help.nrao.edu/staff>

(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 (Section 1.1 and 5.1)? 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?
3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications (Section 5.3)?
4. Follow the "Procedure for responding to Tickets - Triage" in Section 6 of the Helpdesk Staff Guide (which is also summarized in Section 6.6) 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 (Section 7)? If so, did the tickets include a note from the USS (Section 6.3)?
 - c. Did you need to transfer (or did you receive) a ticket to another ARC (Sections 6.6 and 3)? If so, did the tickets include a note from the USS (Section 6.3)?
5. KNOWLEDGEBASE ARTICLES (Section 6.5 & 8): 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? **NOTE: For IT3, only Triage should PUBLISH KB articles.**
6. Any other problems/comments/questions/suggestions?

INDIVIDUAL REPORTS from TRIAGE:

Were you able to login to the helpdesk via your TRIAGE account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution? **Yes, I was able to login.**

Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement? **Yes**

Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications (Section 5.3)? **Yes, the notifications worked. I found it useful to add some alerts, e.g. to know when a ticket has been resolved.**

Follow the "Procedure for responding to Tickets - Triage" in Section 6 of the Helpdesk Staff Guide (which is also summarized in Section 6.6) in answering/assigning the submitted ticket.

Did the workflow in Section 6 work as expected in either assigning or answering a ticket?

If not, what was not clear? I think some details of the workflow should be defined after the IT3 is finished: e.g. what happens when a ticket is assigned to a given person and in the meanwhile the user replies to the ticket with a question for triage? It is easy to miss those tickets... Can also a USS add a note or reply to a ticket that has not been assigned to him/her? (a note may be useful but reply or changing status should be not allowed)

Were any tickets returned to Triage from a USS (Section 7)? If so, did the tickets include a note from the USS (Section 6.3)? **Yes**

Did you need to transfer (or did you receive) a ticket to another ARC (Sections 6.6 and 3)? If so, did the tickets include a note from the USS (Section 6.3)? **Yes**

KNOWLEDGEBASE ARTICLES (Section 6.5 & 8): 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? NOTE: For IT3, only Triage should PUBLISH KB articles. **Yes, the articles appeared in the KB. But USS were publishing them already. Can this be prevented by showing only 'Private' and 'Draft' statuses to the USS? Also, can a triage person see who wrote a given KB article? This is useful to contact the author if anything is not understood before publishing it.**

Any other problems/comments/questions/suggestions?

Regarding the emergency department test:

We got several tickets in the Europe on-call time. I first forwarded the tickets to Stephane Leon, who told me afterwards that he never received my tickets forwarded. Since I did not get any reply to the tickets, I called to the number given in the wiki. The first time I had to call 3 times within half an hour before I got a reply (something was apparently wrong with the settings of Stephane's mobile). The second time he got the phone the first time.

As a triage person, I realised that most of the USS did not change the status of the tickets once they had been resolved. We will have to clarify the workflow to them.

Regarding the views, the triage view should contain only 'unassigned tickets' and 'tickets returned to triage'. This cannot be configured right now. In fact, choosing the view 'Unassigned' shows a lot of tickets that have been assigned and closed.

Every person (at least all the triage persons) should be able to view the tickets from other Executives (only-read permission). This is very useful to build the knowledge database. There may be tickets that require the same answer in all Executives. If the search tools work properly, then sharing the knowledge should work very efficiently.

It is not clear to me how the time works for 'Response overdue'. There was a ticket that was open but it never got overdue. Does a ticket get only overdue if nobody ever replied to it?

And one more question, what does the colour code mean? Some tickets are blue and others yellow, and some have a red arrow. What is the meaning of these colours/symbols?

1. Were you able to login to the helpdesk via your TRIAGE account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

Yes

2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

yes, but the hover help is a bit confusing

Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it

clear how to change the notifications (Section 5.3)?

Yes

4. Follow the .Procedure for responding to Tickets - Triage. in Section 6 of the Helpdesk Staff Guide (which is also summarized in Section 6.6) 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?

the helpdesk staff guide is clear. The software takes some practice though.

b. Were any tickets returned to Triage from a USS (Section 7)? If so, did the tickets include a note from the USS (Section 6.3)?

A ticket was returned to triage by John because it needed to get transferred to the EU ARC. It included a note.

c. Did you need to transfer (or did you receive) a ticket to another ARC (Sections 6.6 and 3)? If so, did the tickets include a note from the USS (Section 6.3)?

Yes, I transferred quite a few to the EU ARC. They mostly related to bugs found in the OT.

5. KNOWLEDGEBASE ARTICLES (Section 6.5 & 8): 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? NOTE: For IT3, only Triage should PUBLISH KB articles.

OK. I did not create or edit any KB articles during the test.

6. Any other problems/comments/questions/suggestions?

I found the process of transferring tickets to the EU ARC a bit confusing, as we discussed. It's not clear to me why we need to make that ticket invisible to us, once it has been accepted by another ARC.

The hover help could be improved. This would help those who don't use the helpdesk every day remember the differences between all the tabs and options and so on. See my comments on the USS question list.

I found it strange, when trying to review all tickets, that I had to click "View All" on the left panel and then change my "view" again in the right panel to something like "trriage view". Of course,once you know the routine this isn't a problem.

1) Yes

2) Yes

3) Yes, the defaults were perfect

4) -----

a. Yes, this was easy to do

b. I don't remember any tickets being returned to triage on my watch

c. Yes, I transferred OT tickets to the EU arc, with a note from me in my triage role

5) I did not try this

6) This was also surprisingly easy to use. I am pleased.

Were you able to login to the helpdesk via your TRIAGE account set up by the helpdesk administrator (Section 1.1 and 5.1)? If not, what happened, who did you contact and what was the solution?

Yes, no problems.

2. Are the entry forms adequate and capture enough information so that you could answer the ticket? If not, which departments/forms need improvement?

Yes, I could answer the ticket or know who to assign it to from the information provided.

3. Did the default alerts work which notified you of a submitted ticket (Section 5.3)? If not, was it clear how to change the notifications (Section 5.3)?

I was notified of a new ticket or one that had come to EU from another ARC, and whenever a response was overdue. However, I had to customise the alerts myself to see e.g. if a ticket was assigned to me, or notes that had been added. But this was not a problem and worked well.

4. Follow the "Procedure for responding to Tickets - Triage" in Section 6 of the Helpdesk Staff Guide (which is also summarized in Section 6.6) 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?

This worked well, no problems.

b. Were any tickets returned to Triage from a USS (Section 7)? If so, did the tickets include a note from the USS (Section 6.3)?

Yes, I had at least one ticket returned to triage (upon request). However, the ticket was not set to unassigned, and no note was included.

c. Did you need to transfer (or did you receive) a ticket to another ARC (Sections 6.6 and 3)? If so, did the tickets include a note from the USS (Section 6.3)?

I received several tickets from other ARCs, all with appropriate notes. I also transferred tickets to other ARCs with no problem.

5. KNOWLEDGEBASE ARTICLES (Section 6.5 & 8): 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? **NOTE: For IT3, only Triage should PUBLISH KB articles.**

I know that this is difficult under the current Kayako system, but I find the current way of dealing with Knowledgebase articles confusing for triage people/those in charge of publishing. There must be some way to visually highlight 'draft' articles that have to be edited and published, and also make a triage person aware of any newly published (perhaps by another ARC) articles (perhaps by leaving them in bold until read or something). Can we see draft articles from other ARCs?

I think that we should only be able to see draft articles from our own ARC, and then whoever is on triage is responsible for editing and publishing them. But there also needs to be a way for triage people to be constantly aware of what is new in the knowledgebase. We should discuss this at some point.

6. Any other problems/comments/questions/suggestions?

I think in general there has to be more of a distinction between 'staff' and 'triage' roles. If staff should not do something (e.g. assign tickets to somebody else, change departments except for 'return to triage', publish knowledgebase articles, answer tickets not assigned to them) then they should not be given the rights to do so, as this just causes confusion and leads to mistakes.

There were some issues with the Emergency Department (a ticket I submitted to EA during their triage took 3 hours before Chile was successfully contacted, we failed to contact Stephane on his mobile for half an hour) that should be discussed.

I still find the ticket 'views' confusing and think that the triage view is poorly configured. It should show unassigned tickets as well as those returned to triage and those that are

transferred from other ARCS, but not those assigned to me as a user – I could not find a way to configure this.

I also don't like the fact that if I look at a ticket in a given department my view then shows me only that department – I think I should always see all departments, unless I specifically select only one specific department.

Appendix D.

Table of Testers and Roles

	ARC	First Name	Last Name	Triage	USS	User
1	NA	Jim	Braatz	y		y
2	NA	Scott	Schnee	y		y
3	NA	Tony	Remijan	y		y
4	NA	Kelly	Sharp	y		y
5	NA	Adam	Leroy		y	y
6	NA	Al	Wootten		y	y
7	NA	Amy	Kimball		y	y
8	NA	Brenda	Matthews		y	y
9	NA	Crystal	Brogan		y	y
10	NA	Doug	Johnstone		y	y
11	NA	Gerald	Moriarty-Schieven		y	y
12	NA	John	Hibbard		y	y
13	NA	Kartik	Sheth		y	y
14	NA	Mark	Lacy		y	y
15	NA	Nuria	Marcelino		y	y
16	NA	Rachel	Friesen		y	y
17	NA	Todd	Hunter		y	y
18	NA	Aaron	Evans		y	
19	NA	Harvey	Liszt		y	
20	NA	James	Di Francesco		y	
21	NA	Remy	Indebetouw		y	
22	NA	Robin	Pulliam		y	
23	NA	Alberto	Bolatto			y
24	NA	Carol	Lonsdale			y
25	NA	Alvaro	Aguirre			y
26	NA	Tommy	Wiklind			y
27	NA	Andy	Hale			y
28	NA	Juan	Cortez			y
29	NA	Antonio	Hales			y
30	NA	Gianni	Raffi			y
31	EU	Maria	Diaz-Trigo	y		y
32	EU	Suzanna	Randall	y		y
33	EU	Paola	Andreani		y	y
34	EU	Andy	Biggs		y	y
35	EU	Stephane	Leon Tanne		y	y
36	EU	Dirk	Petry		y	y
37	EU	Felix	Stoehr		y	y
38	EU	Eelco	van Kampen		y	y
39	EU	Martin	Zwaan		y	y
40	EU	-	Allegro node		y	
41	EU	-	Czech node		y	
42	EU	-	German node		y	
43	EU	-	IRAM node		y	
44	EU	-	Italian node		y	
45	EU	-	Nordic node		y	
46	EU	Leonardo	Testi		y	
47	EU	-	UK node		y	
48	EU	Miroslav	Barta			y
49	EU	Jeremie	Boissier			y
50	EU	Jan	Brand			y
51	EU	Viviana	Casasola			y
52	EU	Arancha	Castro-Carrizo			y
53	EU	Bartosz	Dabrowski			y
54	EU	Francesco	Fontani			y
55	EU	Diego	Garcia			y
56	EU	Jorge	Garcia			y
57	EU	Frederic	Gueth			y
58	EU	Pavel	Jachym			y
59	EU	Nyman	Lars-Ake			y
60	EU	Matthias	Maercker			y
61	EU	Alisdair	Manning			y
62	EU	Marcella	Massardi			y
63	EU	Gautier	Mathys			y
64	EU	Arturo	Mignano			y
65	EU	Mark	Rawlings			y
66	EU	Anita	Richards			y
67	EU	Anthony	Rushton			y
68	EU	Joseph	Schwarz			y

	ARC	First Name	Last Name	Triage	USS	User
69	EU	Vernesa	Smolcic			y
70	EU	Thomas	Stanke			y
71	EU	Baltasar	Vila Vilaro			y
72	EU	Wouter	Vlemmings			y
73	EA	Kazuya	Saigo	y		y
74	EA	Aya	Higuchi	y		
75	EA	Alfonso	Trejo Cruz		y	y
76	EA	Daniel	Espada		y	y
77	EA	Masaaki	Hiramatsu		y	y
78	EA	Masao	Saito		y	y
79	EA	Sachiko	Okumura		y	y
80	EA	Shigehisa	Takakuwa		y	y
81	EA	Yu-Nung	Su		y	y
82	EA	Kouichiro	Nakanishi			y
83	EA	Panta	Bhola			y
84	EA	Robert	Lucas			y
85	EA	Hiroshi	Yatagai			y

Appendix E.

On July 26, 2011, Juan Cortés provided updated information as to the JAO Emergency On-Call system for Proposal Submission emergencies. The updates are posted below in this appendix.

Comments and suggestions on JAO Emergency Call Test

Stephane Leon & Juan Cortés

We performed a JAO Emergency Call test with the Helpdesk and ARC people. The test showed us the following lessons that need to be implemented for the future JAO Emergency On-Call system. These lessons are the following:

1. Murphy's law works always! For example, a phone call can accidentally be missed by pressing the wrong button on the phone (not a joke).
2. We will have a list of persons with a shift of 6~8 H in stand-by. Will the people at the OSF participate to these turnos? (*Currently: TBD*) We will need a minimum of 4 people for 36 hours.
JAO prepared a list of people On-Call, this corresponded a 3 persons as DSO liason plus On-Call personal from ADC & IT
3. We will need a list of phone number here at the SCO to call to the right person in case of problem (CIPT, archive, web server). It would be even better to have a troubleshooting list (server down, archive not working, power cut, etc...) with the persons to contact.
A list with phones and cell-phones of the On-Call personal (DSO, ADC & IT) was prepared and distributed
4. If we are going to use cellular phone, we need to have one from ALMA. We won't call back to a foreign country with our cell phone. (*Currently: Pending*)
A mobile phone for support personal was provided
5. We may need to explain, even quickly, to the astronomers at the DSO what the purpose of such task is and how we are supposed to act.
A document with use cases has been done
6. We could have a backup number to the Emergency Call, i.e. a backup person in case the other does not answer. It would mean that 8+ persons would be necessary to cover 36 hours. But I guess we could use the people at the OSF as well. (*Currently: TBD*)

Each person involved in the Emergency Department provided a cellphone & a fixed phone + email. OSF people were not involved in the process

7. We found that for this test the notification from the ARC messages fail sometimes. We will need to test the system first between ARCs and JAO. *(Currently: It was determined that messages forwarded from the Kayako system were being SPAMMED being sent to Chile. This issue has since been resolved.)*
8. It is not clear the way for contacting the ARCs from JAO. We need a contact person at the ARCs in order to notify the status of the problem. Thus, we need an expedite channel of notification when a problem is detected at JAO *(Currently: TBD)*
I am not sure if ARCs provided contact means to JAO.
9. We need a clear internal (Science (PHT) > IPT > IT > Archive) procedure in case of emergency. *(Currently: TBD)*
A Document called "Preparations for Emergencies during last 36hrs before deadline for Cycle 0 Proposal Submission" was prepared by Juan Cortes, Stephane Leon & Lars-Ake Nyman. This document list the possible use cases, and recommendation in case of an emergency. Moreover ADC prepared their own procedures in case of problems. This are located at

<http://almasw.hq.eso.org/almasw/bin/view/Archive/TestingForCycle0>
<http://almasw.hq.eso.org/almasw/bin/view/JAO/SubmissionRedundancy>
10. In case of catastrophic failures (e.g. Archive down) we need contact person or email list at each ARC in order to notify the problem and avoid unnecessary calls to JAO. *(Currently: TBD)*
Broadcasting is still under discussion.