



NORTH AMERICAN ARC
ALMA Regional Center

The ALMA Helpdesk: NAASC Policy and Staff Guide

V3.2

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ABSTRACT

This document describes the workflow and policies that will be enacted at the NAASC that staff should adopt when answering tickets of the ALMA helpdesk. It also describes how tickets will be assigned to the USS by Triage. Finally, all USS should be familiar with the policies and procedures that are outlined in v2.5 of the ALMA Helpdesk Staff Guide.

As described in detail in the ALMA Helpdesk Staff guide, triage and USS at each ARC will follow a specific workflow when answering a helpdesk ticket. This workflow is illustrated below which is reproduced from the Staff Guide.

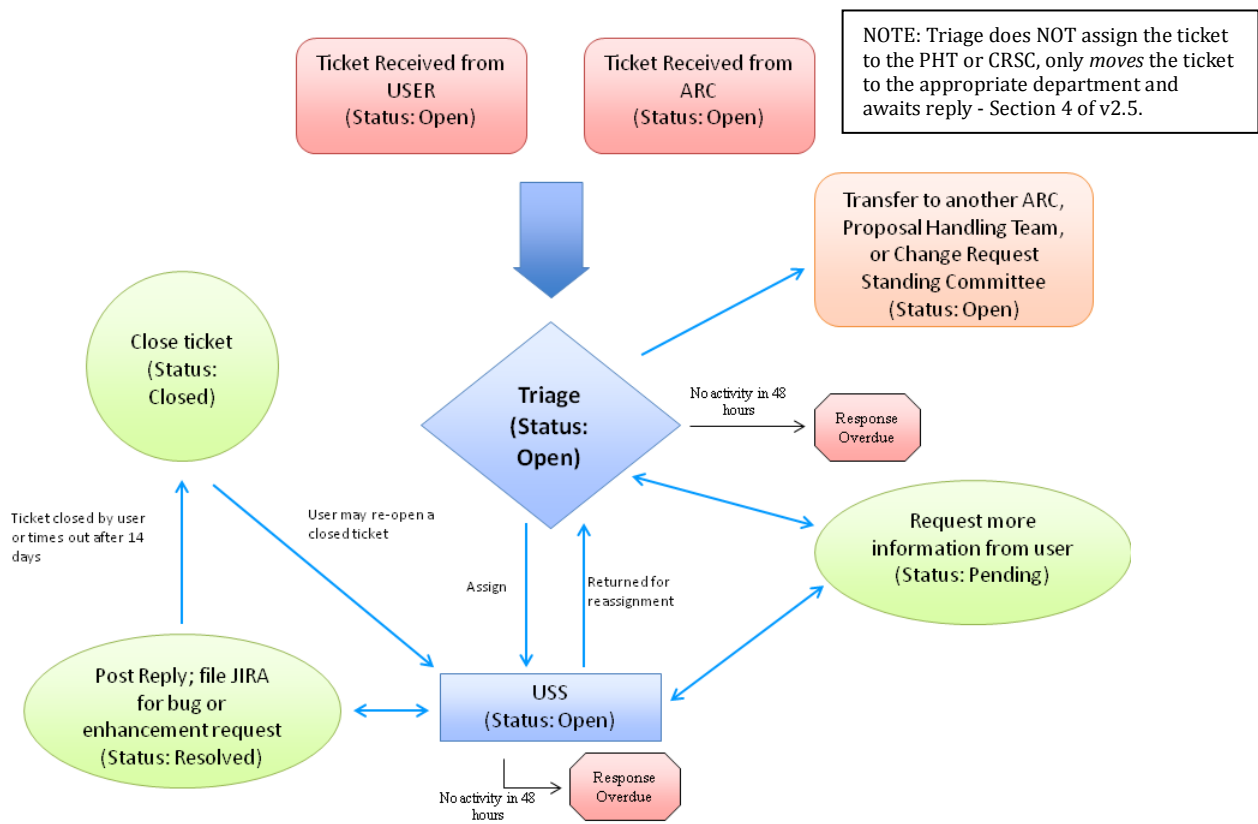


Figure 1: Helpdesk workflow

Ticket Status	Summary
Open	Triage or a USS is actively working on the ticket.
Pending	Triage or a USS has contacted the user and requested more information about the ticket. This state should also be used during the PhII SB generation process while communication is taking place between the NAASC contact scientist and the PI.
Resolved	Triage or a USS believes they have satisfactorily answered the ticket and have posted a reply to the user or the ticket has requested an enhancement or reported a bug to a software system that has been filed with a JIRA.
Closed	No more work needs to be done on the ticket and the user is satisfied with the answer.
Response Overdue	A user has posted a ticket or replied to a ticket response and has not received any answer or notification within 2 working days.

The 10 Commandments that the NAASC will adopt:

1. Triage is now routinely handled by the NAASC data analysts who are handling most of the “Level 1” tickets. However, triage staff at the NAASC may also assign all levels of tickets to any NAASC staff member.
2. Triage staff will use the “NAASC Out of Office Calendar” on Google when assigning helpdesk tickets. When you are out of the office, we will assume that you are NOT available to handle helpdesk tickets. If you **ARE** available to answer helpdesk tickets while out of the office, please note that with an “available for helpdesk” in the title or description of your entry.
3. All NAASC staff are expected to be able to answer any level 1 or 2 ticket relating to the ALMA hardware or software.
4. Assigned tickets must have a response posted within 2 working days.
5. Responses to helpdesk tickets must be done in a courteous and professional manner. When possible, refer the user to the appropriate documentation that may contain the answer in a polite and helpful tone.
6. Avoid using excessive technical jargon and acronyms unless they are directly relevant to the ticket. If you must, spell out acronyms before use for clarity.
7. Avoid using chat or texting clichés, emoticons or abbreviations when posting your reply. This includes using ALL CAPS in a response. In general, follow good internet etiquette and try to give only the facts.
8. Try to post as many knowledgebase articles as possible especially from those tickets asking more general questions. Make every effort to point to the relevant piece of documentation. When posting the KB article, set the status to “Draft”. Select USS staff at the NAASC will then review the article before publishing.
9. If you do not know the answer to your assigned ticket, go find out by consulting other USSs either within the NAASC or from another ARC. If you feel the query is unusually complicated, the ticket can be returned to Triage with a note from the USS explaining the reassignment.
10. If you have any questions, concerns, issues or problems with any policies or procedures of the helpdesk, contact the Helpdesk Manager, Anthony Remijan (aremijan@nrao.edu) or the Helpdesk subsystem scientist, John Hibbard (jhibbard@nrao.edu).

The Golden Rule – Reply to a ticket in the manner in which you would like a reply sent to you.

Checklist for USS in answering a submitted helpdesk ticket: (Relevant sections of the Helpdesk staff guide are listed. Ticket status changes are also highlighted where appropriate.):

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