

D10 – Deliverable 7.1.3

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Dispatching system to answer questions timely operational

D10 – Deliverable 7.1.3

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0 REVISION AND DISTRIBUTION HISTORY AND STATEMENT OF ORIGINALITY

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Statement of Originality

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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1 DESCRIPTION OF WORK

1.1 Introduction

This document (D10-D7.1.3 *Dispatching system to answer questions timely operational*) describes technical and management aspects of the OpenUp! Helpdesk dispatching system. Providers and users can get support from the helpdesk by creating a support ticket¹ and asking a question or stating an issue, which will be dispatched to the identified OpenUp! key staff with the expertise to answer or address it.

To be able to issue a support ticket to the OpenUp! Helpdesk dispatching system, a user has to become an authenticated user by registering at the Helpdesk². There are currently four moderators from three institutions (MRAC, MNHN, NBGB) dispatching the tickets according to the subject of the question and monitoring that they get answered timely.

The thematic range of questions addressed to the Helpdesk so far are mostly of technical nature, about the BioCASE installation or the mapping of data from ABCD to ESE. Other subjects covered are related to Intellectual Property Rights (IPR) and licensing, as well as outreach and dissemination. It turned out that those themes are very near to what we expected from the beginning. Only the development in Europeana's Legal Framework led to an increase of very specific questions and discussions on IPR and licenses of the metadata, but these could be well addressed by the key staff of the Helpdesk.

The key staff of the helpdesk consists of experts from institutions within the consortium as well as from the outside, their fields of expertise are described in Component 7.1.1 Key staff for the Helpdesk Network identified³. A major role in this play the European GBIF nodes (ZFMK, BGBM, RBINS, UCPH, UH, MNHN, UT-NHM), the GBIF Secretariat, and the BioCASE (SYNTHESYS) Helpdesk. The system is open for new individual or institutional partners to join and help with their expertise. It is important to have a wide spectrum of themes and expertise covered to be able to also answer unforeseen questions. Since publishing of C7.1.1 two other groups of experts joined the Helpdesk and are ready to answer questions via the dispatching system: The IPR group of OpenUp! from the Royal Botanic Gardens, Kew (RBGK), and the experts for outreach and dissemination from the Národní Muzeum (NM) in Prague.

Besides issuing tickets via the dispatching system, there are two other means of directing questions to the Helpdesk: by email⁴ or via the forum⁵. Emails are transformed into tickets and then dispatched to and answered by experts. Questions in the forums too will be answered by the experts, but that process is based on the notification system and not integrated into the dispatching system. All answers, however, are being further edited and integrated into the forums, the FAQ section and/or the Guidelines for users and content providers (D09/C7.1.4)⁶, a document which was published in March 2012 (version 1) and will be updated as the project continues.

¹ Users can create a support ticket when logged in: <http://openup.helpdesk.africamuseum.be/ticket>

² Users can register to the Helpdesk at <http://open-up.cybertaxonomy.africamuseum.be/user/register>

³ Document C7.1.1 accessible at: http://open-up.eu/sites/open-up.eu/files/u2/C711_Key_staff_helpdesk_Final%20Version_Updated.pdf

⁴ Helpdesk email address: openup.helpdesk@africamuseum.be

⁵ OpenUp! Helpdesk Forums: <http://openup.helpdesk.africamuseum.be/forum>

⁶ Document Guidelines for users and content providers v. 1 accessible at: <http://open-up.cybertaxonomy.africamuseum.be/file/722/download/739>

The OpenUp! Helpdesk facility⁷ is based on Drupal 6 and the dispatching system is realised by using the Support Ticketing System⁸. It has been chosen out of a list of different possibilities⁹ after consultation with the GBIF Secretariat¹⁰ that is using the same system for the GBIF Helpdesk¹¹. The BioCAsE Helpdesk¹² is technically based on the email address support@biocase.org, which is integrated into the OpenUp! dispatching system representing an alias expert user.

1.2 Functionality of the support ticketing system

The Support Ticketing System module allows for a variety of customisations, depending on the scope of the Drupal installation. For the OpenUp! Helpdesk we decided to use an approach that makes it as easy as possible for the user to issue a ticket, without having to choose from variables like the state or the priority of a support ticket.

On the other hand, for the moderators' management of the tickets, a richer set of possibilities has been implemented. Moderators have an overview of all issued tickets. They can see which user issued the ticket (Reported by) when and whom it is assigned to (Assigned to), i.e. the expert which is supposed to solve the ticket. By default a new ticket is assigned to a moderator who then dispatches the ticket to an expert. The moderator can also see and change the state of a ticket (New, Active, Pending, Closed) and its priority (Low, Normal, High, Critical).

As for the experts, the system is implemented in a way, so that they too have to interact with it as little as possible. Once a ticket is assigned to an expert he/she receives an email with a hyperlink to the ticket. The expert has to open the URL given and communicate with the user via the ticketing system until the issue is solved. An expert can either consist of one staff member or of different individuals using the same email address and acting as one expert on behalf of the OpenUp! Helpdesk.

1.3 Workflow of ticket issuing, dispatching and answering

These seven steps show the workflow for issuing, dispatching and answering a ticket from the views of the user, the moderator and the expert. The different roles are marked in bold, the functions are underlined.

1. The **user** has to log in to the Helpdesk and click on the hyperlink „Get support here“ or go to <http://openup.helpdesk.africamuseum.be/ticket>. The **user** then has to enter a subject in the title field, the question or a description of an issue in the body field, and click submit to issue the ticket [Figure 1, Annex].
2. The **user** receives an on screen message that the ticket has been created [see Figure 2, Annex]. The **user** and the **moderator** receive an email with more details about the ticket submission [see Figure 3, Annex]. Every future update on the ticket will also be communicated to both **user** and **moderator**

⁷ OpenUp! Helpdesk Homepage: <http://openup.helpdesk.africamuseum.be>

⁸ Support Ticketing System : View. Posted by Jeremy: <http://drupal.org/project/support>

⁹ See list of Drupal Project Management / Ticket Tracking Modules at: <http://groups.drupal.org/node/17948>

¹⁰ A description of the evaluation process by the GBIF secretariat written by Burke Chih-Jen Ko can be found at: <http://gbif.blogspot.com/2011/08/configuring-drupal-and-some-modules-for.html>

¹¹ GBIF Helpdesk: <http://www.gbif.org/participation/helpdesk/>

¹² BioCAsE Helpdesk: http://www.biocase.org/help_desk/index.shtml

via email. Both can also always check the existing tickets online, the user has to click on the menu link My tickets.

3. The **moderator** has to click on View support tickets to get an overview [see Figure 4, Annex]. If there is more than one ticket, they can be sorted by their unique Id, the name of the Ticket, the date the ticket got Updated, the user the ticket got Reported by, and to whom it is Assigned to, by State (New, Active, Pending, Closed), Priority (Low, Normal, High, Critical), and by the number of Updates.
4. The **moderator** can either directly dispatch the ticket to an expert from here on, or click on the title to see the whole ticket [see Figure 5, Annex]. In both cases the **moderator** types in the name of the expert in the assigned to field, changes the status from new to active, – depending on how urgent it is to solve the ticket the moderator can also change the Priority from Normal to Low, High, and Critical – and clicks save.
5. The ticket now is assigned to an **expert**, who is informed about that via email, clicking on the link provided [see Figure 6, Annex]. The **expert** can answer the question or discuss the issue via the commenting function of the ticket. If the expert regards a question as answered, he/she should change the status of the ticket to Closed. If follow up questions have to be asked to the user who issued the ticket, the status of the ticket should be changed to Pending.
6. If the **expert** decides not to answer the question or deal with the ticket, it should be re-assigned to the **moderator** for further dispatching. If the **moderator** sees, that a ticket is not dealt with after a working week, he/she should check back with the **expert** and evaluate if the ticket needs to be re-assigned to another **expert**.
7. Once a ticket is closed, the findings of the conversation (i.e. the question and the answer) may be integrated into the OpenUp! guidelines, the OpenUp! forums and/or the FAQ section by the **moderator**. For practical reasons during this copy editing process the information will be anonymised, unless the parties of the conversation (**user** and **expert**) state, that their names should be attributed in the re-use of the information.

1.4 Outlook

The dispatching system to answer questions is now timely operational and the Helpdesk thus prepared to deal with the day-to-day business of answering questions, as well as with two important upcoming milestones of the OpenUp! Project: The installation of the BioCAsE software and the mapping of the data sources by the partners in summer 2012¹³, and the outreach campaign to attract new content providers in summer 2013¹⁴.

Over the course of the project the Helpdesk will be reviewed and enhanced where possible and needed. In regard to the dispatching system the following aspects will be taken into account: Having a full email integration which automatically transforms an email into a support ticket; automated keyword identification that could lead to an automated dispatching of tickets to a particular expert; more customisation where user could themselves assign a ticket to an expert and/or change the status or priority of a ticket.

¹³ MS09 *Local zoological provider software and metadata mapping functional for all content data sources*, and MS10 *Local botanical provider software and metadata mapping functional for all content data sources*, both due in M18.

¹⁴ MS12 *Outreach campaign to attract additional associated partners started*, due in M30.

For enhancing the system in regard to other expert systems and helpdesks and to ensure sustainability of the technology and the workflow of the system we continue and extend the collaboration with other support infrastructures of the domain, like the BioCASE Helpdesk and the GBIF Helpdesk. Technical integration where possible and synchronised workflows and the possibility to learn from each other are on the to-do list for the upcoming months of the OpenUp! project.

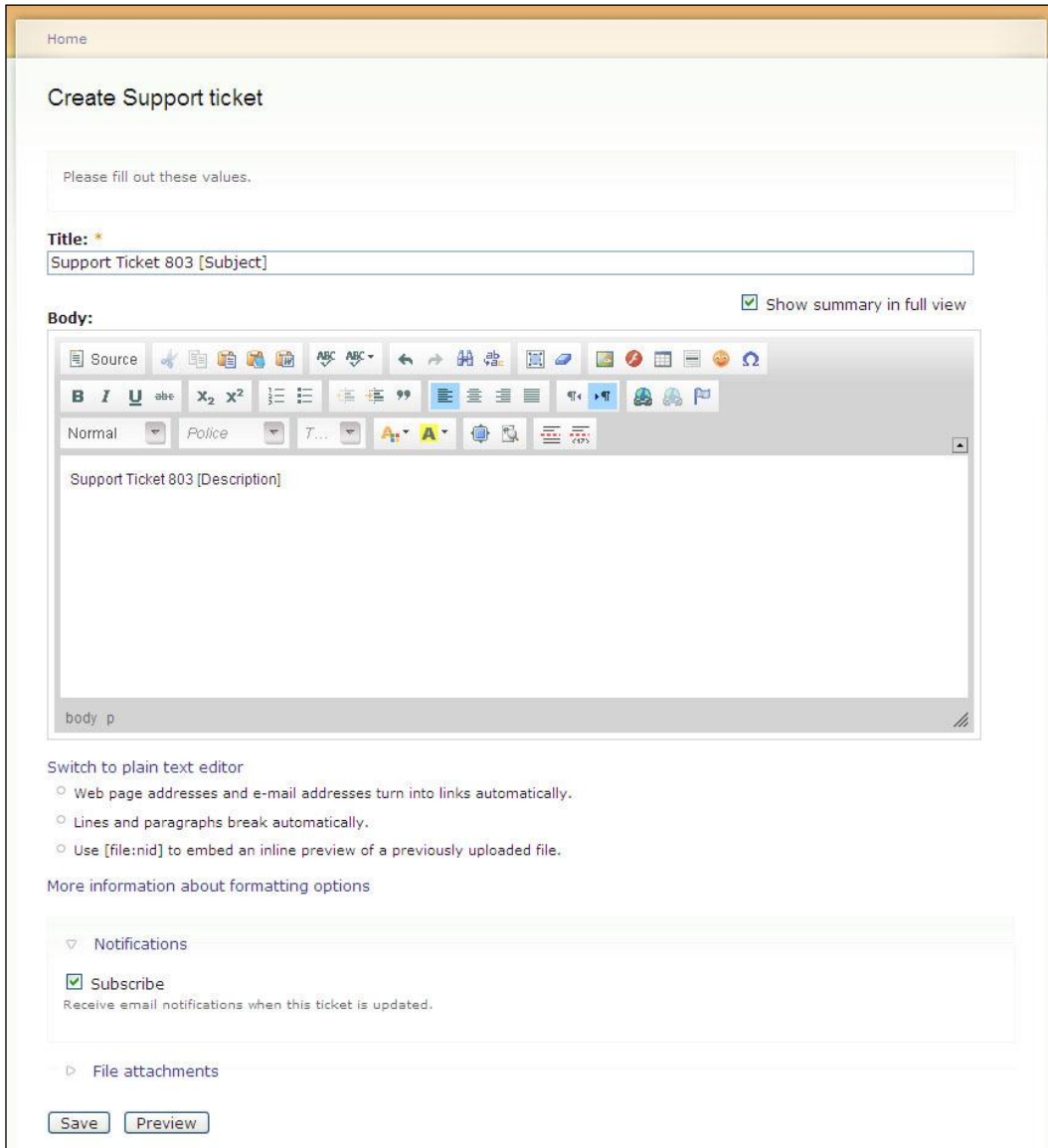
2 LIST OF REFERENCES

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Configuring Drupal and some modules for ticketing emails. Posted by Burke Chih-Jen Ko on August 21, 2011 10:42pm URL: <http://gbif.blogspot.com/2011/08/configuring-drupal-and-some-modules-for.html>

3 ANNEX



The screenshot shows a web interface for creating a support ticket. At the top, there is a 'Home' link. The main heading is 'Create Support ticket'. Below this, a message says 'Please fill out these values.' The 'Title' field is required (marked with an asterisk) and contains the text 'Support Ticket 803 [Subject]'. To the right of the title field is a checked checkbox labeled 'Show summary in full view'. The 'Body' field is a rich text editor with a toolbar containing various icons for text formatting (bold, italic, underline, text color, background color), alignment, bulleted and numbered lists, indentation, link, unlink, and image insertion. The body field contains the text 'Support Ticket 803 [Description]'. Below the rich text editor, there is a link to 'Switch to plain text editor' and a list of options: 'Web page addresses and e-mail addresses turn into links automatically.', 'Lines and paragraphs break automatically.', and 'Use [file:nid] to embed an inline preview of a previously uploaded file.' Below these options is a link for 'More information about formatting options'. There is a 'Notifications' section with a checked checkbox for 'Subscribe' and the text 'Receive email notifications when this ticket is updated.' Below that is a 'File attachments' section. At the bottom of the form are 'Save' and 'Preview' buttons.

Figure 1: The user has to enter a subject in the title field, the question or a description of an issue in the body field, and click submit to issue the ticket.

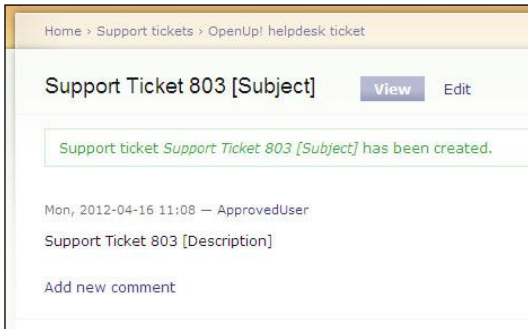


Figure 2: The user receives an on-screen message that the ticket has been created.



Figure 3: The user and the moderator receive an email with more details on the ticket submission.



Figure 4: The moderator has to click on View support tickets to get an overview.

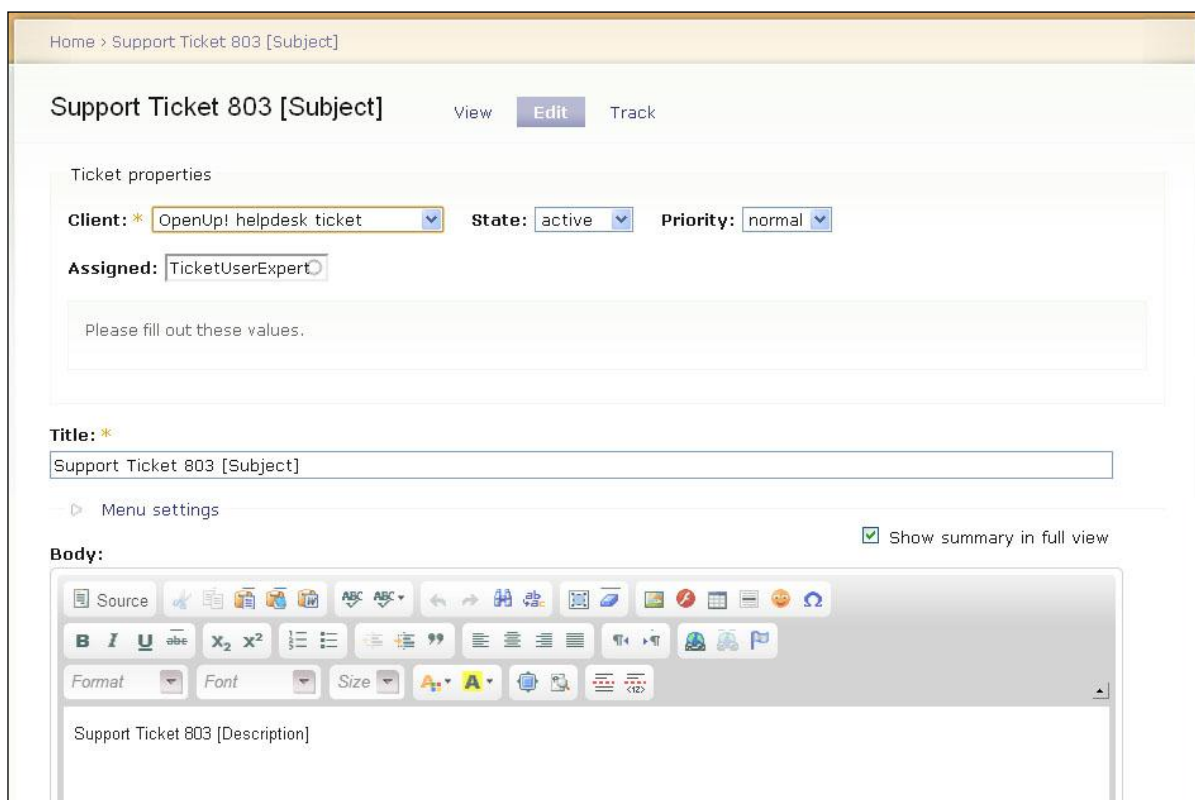


Figure 5: Full view of the ticket.



Figure 6: The ticket now is assigned to an expert, who is informed about that via email, clicking on the link provided.