D10 – Deliverable 7.1.3

Project Acronym: OpenUp!
Grant Agreement No: 270890
Project Title: Opening up the Natural History Heritage for Europeana

Dispatching system to answer questions timely operational
D10 – Deliverable 7.1.3

Revision: 3a [Final]

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Project co-funded by the European Commission within the ICT Policy Support Programme

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<td>C Confidential, only for members of the consortium and the Commission Services</td>
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0 REVISION AND DISTRIBUTION HISTORY AND STATEMENT OF ORIGINALITY

Revision History

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<td>2012-03-22</td>
<td>A. Archambeau, P. Roca Ristol, J. Jogeva, B. Jacob</td>
<td>MNHN, UT-NHM, MRAC</td>
<td>OpenUp! Annual Meeting WP7 follow up meeting, finalizing user roles and workflow.</td>
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<td>2012-03-27</td>
<td>B. Jacob, J. Davy P. Roca Ristol, L. Smirnova</td>
<td>MRAC, NBGB MNHN, MRAC</td>
<td>E-meeting discussion and final test of the system.</td>
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<td>2012-04-04</td>
<td>J. Davy</td>
<td>NBGB</td>
<td>First draft of the written component report.</td>
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<td>B. Jacob</td>
<td>MRAC</td>
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<td>2012-04-17</td>
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<td>2012-04-17</td>
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<td>2012-04-18</td>
<td>Coordination Team</td>
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<td>Minor editing</td>
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<td>Project Coordinator (W. Berendsohn, BGBM)</td>
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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.

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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
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 facility\(^7\) is based on Drupal 6 and the dispatching system is realised by using the Support Ticketing System\(^8\). It has been chosen out of a list of different possibilities\(^9\) after consultation with the GBIF Secretariat\(^10\) that is using the same system for the GBIF Helpdesk\(^11\). The BioCASE Helpdesk\(^12\) 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](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**.

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\(^7\) OpenUp! Helpdesk Homepage: [http://openup.helpdesk.africamuseum.be](http://openup.helpdesk.africamuseum.be)

\(^8\) Support Ticketing System : View. Posted by Jeremy: [http://drupal.org/project/support](http://drupal.org/project/support)

\(^9\) See list of Drupal Project Management / Ticket Tracking Modules at: [http://groups.drupal.org/node/17948](http://groups.drupal.org/node/17948)


\(^12\) BioCASE Helpdesk: [http://www.biocase.org/help_desk/index.shtml](http://www.biocase.org/help_desk/index.shtml)
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 2012\(^{13}\), and the outreach campaign to attract new content providers in summer 2013\(^{14}\).

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.

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\(^{13}\) 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

3 ANNEX

**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.