ELViS Helpdesk Manual

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The ELViS helpdesk system/software is made by Jitbit

What is the helpdesk manual?

- Audience, mostly for the help desk technicians, but also ELViS users.
- Information about the different person roles in the helpdesk.
- Provide information on the help desk workflows and lines of support.
- This is a living document and will be reviewed at least monthly.
- Explains the features/functionalities of the helpdesk.
- Guidance on how to solve user issues.
- Explain a code of conduct, rules.
- Links to external resources and their allocation.

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1. Scope of Helpdesk support

Table 1 presenting what the helpdesk does and does not support

The Helpdesk **Does**:	The Helpdesk **DOES NOT** provide:
Provide guidance for users on how to provide data to ELViS	Collection/specimen, institutional specific information. Like visit logistics, digitisation of certain specimens, access to certain specimens.
Provide guidance on data standards used in ELViS	The processing of access requests specific institutions.
Provide guidance and resolve general difficulties/complaints with using ELViS.	Specific issues/complaints that occurred within an institute.
Complaints about the VA/TA application process, and application rejections.	
Technical issues with the System.	
Provide information about TA and VA call processes.	
Feedback on new additions and improvements to ELVIS.	
Assigning ELViS/access roles definitions of roles. Possible guidance on what the different roles are and how to assign them. b	

2. Helpdesk staff and Lines of Support (which types of queries they deal with)

Table 2 Presenting lines of support and the technician.

Ticket Categories	**People (technicians)**
1st line support	

General issues/queries Common I.T Issues Data standards Policy and Data management Best practices General information about TA and VA Feedback about ELViS	
Technical 2nd line support	
Technical software issues **Feature requests**	Technical team at Picturae; Naturalis
TA & VA 2nd line support	
Transnational Access Admin Deals with specific issues around TA applications.	synthesys@nhm.ac.uk
Virtual Access Admin Deals with Specific Issues around VA.	synthesys@nhm.ac.uk

3. Guidance for users on how to submit a ticket to the helpdesk

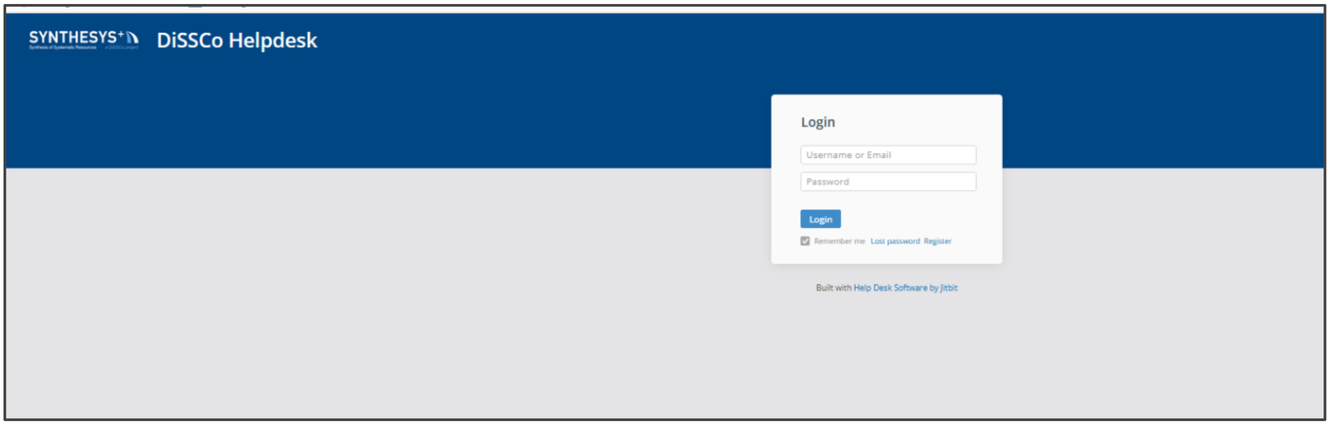
3.1 How to submit a query

ELViS users can submit queries, issues, and feedback to the help desk via the support@dissco.jitbit.com allocated in the help page on the ELViS platform. Please be aware of which types of queries the helpdesk deals with before submitting (see section 1).

3.2 What happens after you submit your ticket?

Your email will be turned into the ticket in the helpdesk, and you will receive an automated confirmation message that your ticket has been received and it will be dealt with as soon as possible. Also it will show you how and a link (for three days so you can see your tickets) to see the progress status of your ticket. Alternatively, you can create a register and log into the helpdesk here: https://dissco.jitbit.com/helpdesk/

Figure 1 Screenshot of login page

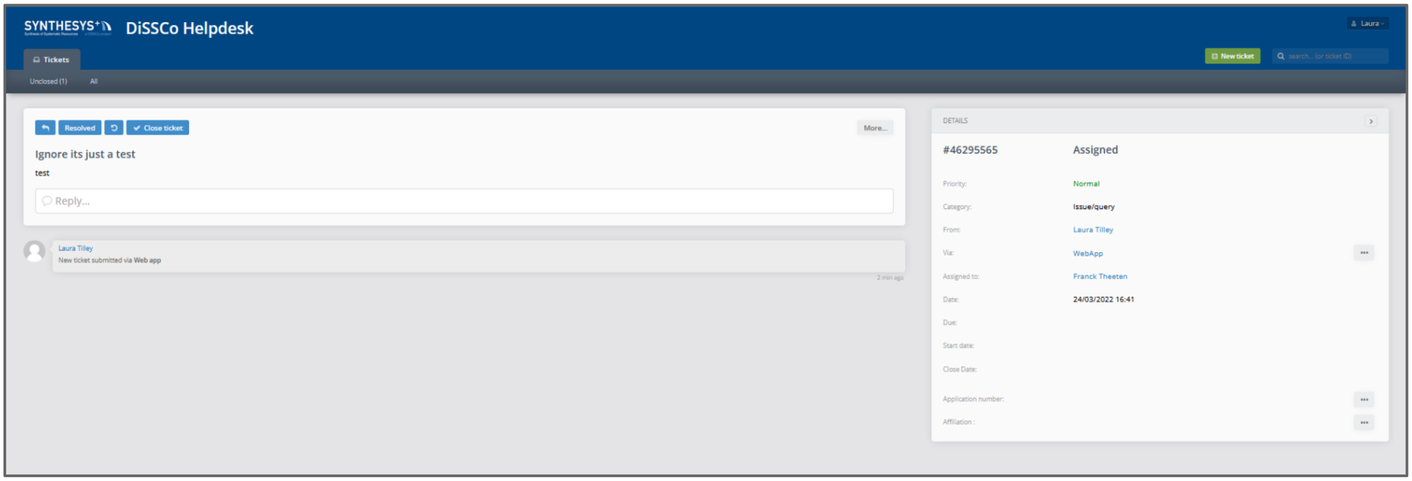


3.3 Regular users view inside the helpdesk

When users are logged into the Jitbit system, they will see a page similar to that in Figure 1 with a list of all their submitted tickets. They can be filtered between open and closed. When you click on a ticket you can see further details (e.g., replies, progress, etc). You can also reply to tickets within the helpdesk.

Figure 2 Screenshot of a regular user's view of the ticket page.

Figure 3 Screenshot of a regular user's view of the inside of a ticket and the details available.



3.4 FAQs

Before submitting a ticket, please see SYNTHESYS+ FAQs for TA (https://www.synthesys.info/access/faqs.html) **and VA calls** (https://www.synthesys.info/access/virtual-access/Virtual-Access-FAQs.html) **before submitting a ticket.**

4. Code of Conduct

The rules and best practices on how Help Desk technicians should operate within the system and what is expected of them.

List rules and best practices:

- Polite, positive, and courteous language is the rule for any communication.
- Each technician prohibits any disclosure of confidential information.
- No form of harassment is tolerated.
- Respect should make everyone feel welcome and an integral part of the program.
- the technician must abide by the agreed time commitments, if commitments change the helpdesk coordinator must be notified ASAP.
- Technicians must inform CETAF leaders ASAP if they are unable to work due to illness, etc.
- Helpdesk technicians should provide advance notice if they are planned to be out-office to CETAF leaders
- If technicians are planned to be out of office, then they must notify the helpdesk coordinator ASAP and change their status in the Helpdesk to out of office.

5. Helpdesk Workflow and standard operating procedures

This section describes the workflow of the ELViS Helpdesk in terms of the different people's roles in the helpdesk and their level of access, and how tickets are processed, from creation to ticket assignment, prioritizing, escalating, resolving and closing it. In addition, it describes the different automated rules in place to facilitate the workflow, and a checklist of procedures that Helpdesk technicians should follow when dealing with tickets.

5.1. Helpdesk User Roles

In the Jitbit helpdesk system users will be allocated to 1 of 3 roles: *Administrator, Technician or Regular User.* These roles have different levels of access to all the Helpdesk functionalities.

User Role Descriptions

Administrator: The administrators have access to all the functionalities of the Jitbit helpdesk. More specifically, they can add and remove people from the helpdesk, set up action triggers/rules, they can see all tickets and view all technicians' profiles and allocated ticket status, create reports, change user passwords. This role is assigned to people that manage the running of the helpdesk and the organization of staff.

Technician: Can answer and close incoming tickets, view reports, etc. Also, receives email-notifications about new tickets in their categories. This role is given to people who work in the helpdesk (i.e., dealing with incoming queries).

Regular user: Can submit new tickets and leave replies to their tickets. This role is assigned to people seeking help (e.g., ELViS users), but do not work in the helpdesk.

5.2 Workflow components

The following subsections present and describe the main components of the helpdesk workflow:

5.2.1 Ticket creation

ELViS users will be able to create a ticket via the helpdesk support email allocated in the ELViS System: support@dissco.jitbit.com

Once a user has submitted a ticket to the help desk then they will receive an automated message saying that their ticket has been received and will be dealt with as soon as possible. In the message they will also receive a link to their ticket so they can see the progress status.

ELViS users should be able to login to the helpdesk and see the status of their tickets.

5.2.2 Ticket assignment

Tickets are automatically assigned to the least busy technician in the first line to support automated rules (see **table 5** for explanation of rules). Technicians will be notified of the tickets they have been assigned to via an email sent to their personal email address. Also, tickets are listed centrally in the helpdesk system, tagged with the names of assigned technicians. The help desk provides the option for technicians to filter the tickets that belong to them **(see section 7).**

5.2.3 Ticket Prioritisation

First line technicians will be responsible for prioritising the tickets that they are assigned to by using the prioritisation criteria that is based on a criterion developed by Information Technology Infrastructure Library (ITIL), a globally recognised set of best practices for Information Technology Service Management. Additionally, the definitions of the different prioritisation levels are based on:https://wiki.octopus-itsm.com/en/articles/priority-definition-and-basic-service-levels
See below

The prioritisation levels will be based on how widespread the ELViS user issue is (i.e. does it just affect the individual or all ELViS users) and the impact that it might cause to the systems and service credibility. Once a technician has determined the Priority level of the ticket then they should tag the ticket with the priority level (Critical, High, Medium, Low, Planning) and this will trigger a timer.

Figure 4 Prioritisation chart

		IMPACT		
		High	Mid	Low
URGENCY	High	1	2	3
	Mid	2	3	4
	Low	3	4	5

Urgency level definitions:

Urgency is the time it takes for an incident to have a significant impact on the working of the system.

- **High:** critical, no workaround exists.
- **Mid:** significant, no immediate workaround exists.
- **Low:** minor, workaround is available, Long-Term improvement.

Impact Level Definitions:

Impact measures the effect of an incident on working processes of the system. The evaluation of the impact is based on several criteria:

- the number of affected users,
- the number of affected services (e.g preventing the processing of VA and TA calls),
- breaches of regulations or laws,
- the reputation of ELViS.

- **High:** concerns the working of the whole system/organisation.
- **Mid:** concerns working in a department/service or more than 5 users.
- **Low:** concerns 1 to 5 users or is general feedback for improvement to ELViS.

Table 3 Prioritisation Level Response times. (Disclaimer: the response times are only estimates and may vary during particularly busy times).

Priority Code	Name	Description	Examples	Resolve within	Actions when violated

1	Critical	Interruption that makes a critical functionality inaccessible or a complete interruption causing a severe impact on services availability. There is no possible alternative/no work around exists. Does not include development issues.	-Site is down -Administrative application/system down -E-mail communication is down -Designated key users impacted by issues? (for example during TA/VA calls when the deadline is approaching some issues can become critical).	4 hrs	Email the administrators
2	High	Non-critical but significant issue affecting functionality or network access. However, the services are still operational. Support issues that could escalate to critical if not addressed quickly. No acceptable alternative is possible. Multiple users are affected.	- Loss of working functionalities during the submission process (not possible to attach a file, contact email not correct, download button not working…) -Institutional profiles not available or lost -Impossible to make necessary changes to the content on the site (administrator role)	24 hours	Email the administrators

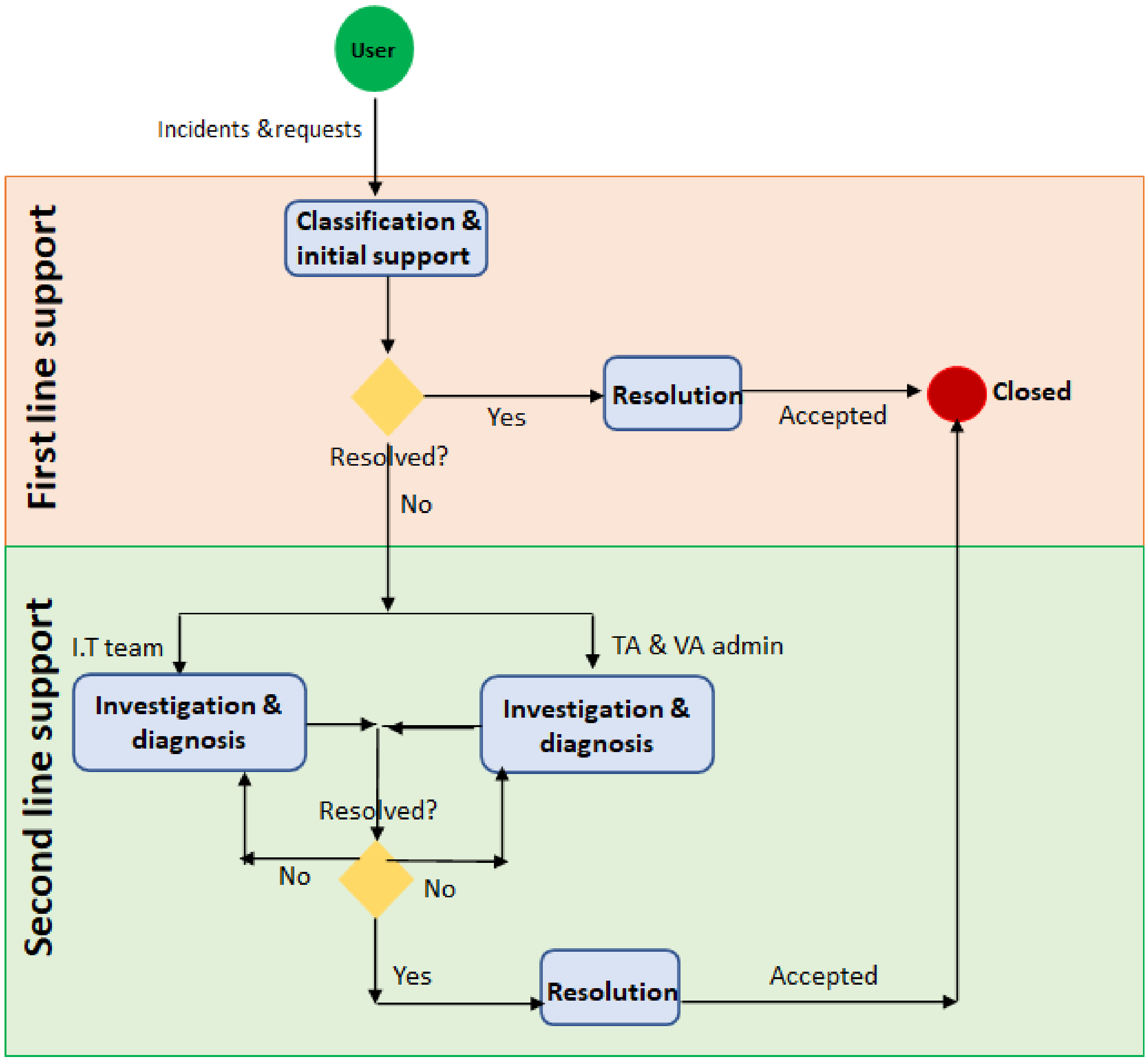
3	Normal	Non-critical function or procedure unusable or hard to use having an operational impact, but with no direct impact on services availability. A workaround is available. Effects 1 or 2 users. Includes intermittent issues and reduced quality of service. A workaround may be available. Does not include development issues.	-Individual user accounts or access problems -Single user unable to submit a request or provide data -Search functionalities not working properly -User cannot submit their VA or TA application due to technical difficulties -User has not received confirmation that their application for TA or VA has been submitted.	3 days	Email the administrators
4	Low	Application or personal procedure unusable, where a workaround is available or a repair is possible. A minor service issue or general inquiry. Includes product questions, feature requests and development issues. Redirecting users to Knowledge base platforms is recommended.	-Non-critical tutorial questions on e.g. what is MID and how to use the standards. -Questions related to the collections, loans -Questions related to services and tools provided by Elvis -User requesting assistance with finding information, contacting people or starting a new project. -Technical consultations for pending purchases.	5 days	none
5	Planning	A long term project or service request with no specific expectations on response time. Priority 5 issues will be resolved based on scope, timeline, and other	-Feedback on service improvements, long term improvements. -Planned developments.	Planned	

		competing Priority 5 calls.			

5.2.4 Incident Management

Figure 1 provides a general overview of the helpdesk workflow for incident management. The first-line of support provides initial support and classification of all incoming requests and incidents. If the incident/request cannot be resolved by first-line support, then it is passed onto the relevant second-line support team. For example, technical/software issues are sent to the I.T team, and TA and VA related issues are sent to the TA & VA admin.

Figure 5 diagram of ELViS helpdesk workflow.



5.2.4.1 Incident status tracking

The tracking of tickets is based on the [ITIL process]**:**

- **New** - an incident is submitted but is not assigned to a technician for resolution
  - *All new unassigned tickets will be tagged with new.*
- **Assigned** - an incident is assigned to an technician for resolution
  - *Indicated by the ticket displaying the responsible technician's name.*
- **In process** - the incident is in the process of being investigated for resolution

    - *Tickets will display in progress (automated trigger) when the ticket is viewed by a technician.*

- **Resolved** - a resolution has been put in place
    - *Technicians will manually indicate this, changing the status and informing the relevant user.*

- **Closed** - the user has agreed that the incident has been resolved and that normal state operations have been restored
    - *Technicians manually change the status.*

5.2.5 Glossary of Automated Rules and ticket labels (aka tags)

Table 4 Ticket labels/ tags

Ticket tags	Description
VA	Tickets regarding Virtual Access
TA	Tickets regarding Transnational Access
Complaint	Ticket regarding user complaints
Easy I.T.	Tickets for common or easy to resolve I.T issues.
Technical issue	Technical issues that only the I.T team can solve.
Critical	Prioritisation level
High	Prioritisation level
Normal	Prioritisation level
Low	Prioritisation level
Planning	Prioritisation level

Table 5 List of automated rules that have been applied in the helpdesk.

Rule name	Functionality	Purpose
Default prioritisation of new tickets is ‘Normal’.	When a ticket is created it is automatically set as ‘Normal Priority’	This prevents users from prioritising their own tickets, and avoids miss use, for example users may say their ticket is critical when it really isn’t. Only Helpdesk staff have the authority to change the priority status.
Automated ticket allocation	tickets are assigned to the least busy technician (the one who has the least active tickets). Admins are excluded from receiving tickets.	It's more time efficient than a person having to assign tickets manually.
Ticket changes status to 'in progress' when the technician clicks on the ticket	When a technician clicks and opens the ticket the status changes to ‘in progress’	To notify that the ticket is being attended too.
Admin receives an email if ticket is overdue	When a ticket becomes overdue the administrators receive a notification.	To make sure that the helpdesk is running optimally and that tickets are being resolved in good time.
Timer stops when tickets are marked as resolved.	When ticket status is manually changed to resolve the timer, it stops.	So that it doesn’t trigger the overdue rule.
Time allocation for Critical tickets	When the ticket priority is changed to ‘critical’ then the response ‘due time’ is set for 4 hours (considering normal working hours).	It helps to provide guidance on the prioritisation of tickets and the timeframe for responding to them (i.e. which needs immediate attention) helps the helpdesk maintain a good service level, and provide

		expectations to the users.
Time allocation for high priority tickets	When the ticket priority is changed to 'high' the due response time is set at 1 day (considering normal working hours)	Same reason as mentioned for time allocation for Critical Tickets.
Time allocation for Normal priority tickets	When the ticket priority is changed to Normal the due response time is set at 3 days (considering normal working hours).	Same reason as mentioned for time allocation for Critical Tickets.
Time allocation for low priority tickets	When the ticket priority is changed to low the due response time is set at 5 days (considering normal working hours).	Same reason as mentioned for time allocation for Critical Tickets.

5.3 Standard operation procedure for dealing with tickets

Table 6 presenting a sequence of actions that first-line support technicians should follow when dealing with their assigned tickets

Action step	Action description	Result
1) Classification and Prioritisation of the ticket	- Classification of ticket -placed in the correct category - Determine the ticket priority level using the prioritisation criteria - *Tag with priority level.*	Once a priority has been set for the ticket, this will trigger an automated timer/due date for response.

Action step	Action description	Result
2) Resolve incident or request	- To help you identify the issue and resolve the ticket. - Contact users and provide them with your solution. - If a solution is accepted, mark it as resolved.	Wait for user response.
3) Escalation to Second-line support *(Only if Ticket is too technical to be resolved by you)*	- If you cannot resolve a user issue because it is a technical software issue or specific VA, or TA issue then escalate to the relevant second-line support. You can escalate to the second support line by changing the ticket category (e.g., Virtual Access Admin and assigning to the least busy second-line support technician - Contact User to say their ticket has been escalated, giving reasons and the name of the technician now dealing with it. - The second line VA and TA admin is (synthesys@nhm.ac.uk) - For technical support (Picturae or naturalis). -	The second-line technician will then deal directly with the user and provide a solution.
4) Closure of ticket	- Before closing the ticket, the technician should write a summary in the *'ticket notes'* field of how the ticket was solved and reason for closing the ticket. - If the user is happy with the solution, change the ticket	Tickets are marked as closed and ticket notes are updated.

Action step	Action description	Result
	status to closed. - If the ticket is escalated to second-line support, then they should write notes and close the ticket.	

5.4 Helpdesk Maintenance

The following measures have been put in place to ensure that the helpdesk runs efficiently:

- Scheduled meetings (all technician) to discuss challenges (e.g., difficulties solving certain queries, recurring queries) and how to solve them; work-flow improvements, needed resources etc.
- Scheduled reviews and updating of Frequently Asked Questions (every month).
- Scheduled reviews of Helpdesk manual (every month).

6. Common user queries and how to solve them

6.1 General information about VA and TA calls

- **https://drive.google.com/file/d/18yIZ7KY5SdyKXUu-Vn-RPq_tSvgFT9nD/view?usp=sharing** Associated canned replies.

6.2 Easy I.T queries

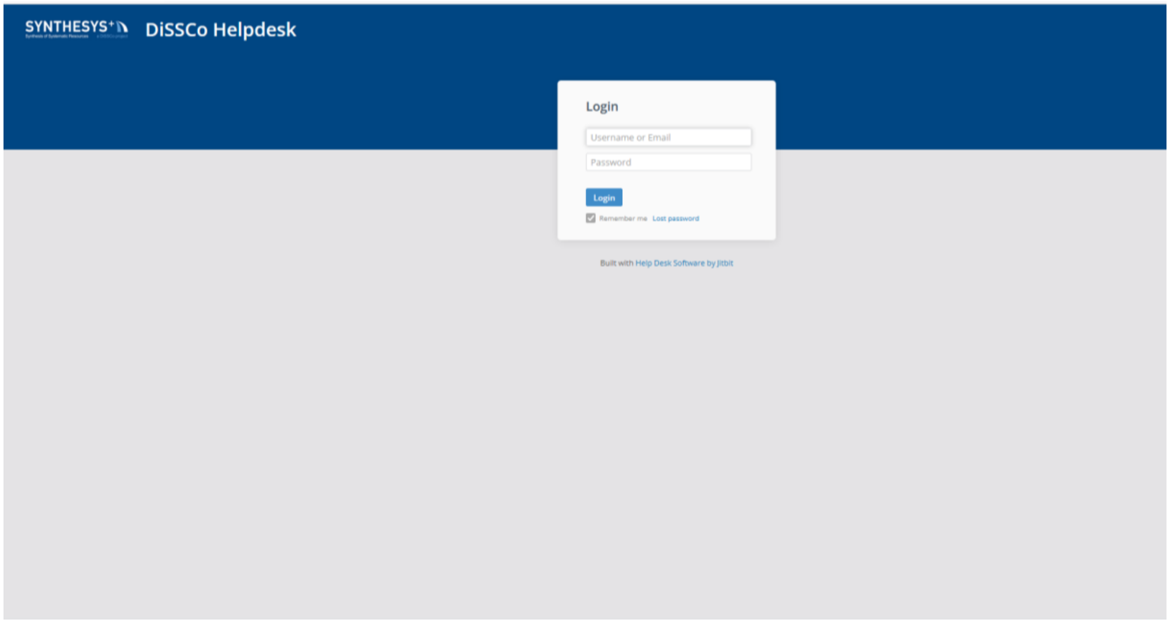
7. JitBit functionalities - A how to guide for technicians

This section will describe how to use the helpdesk functionalities, with the aid of screenshots. Also see this video for general information on Jitbit functionalities: https://www.youtube.com/watch?v=lweh8JW6NTc

7.1 Login

To access the help desk technicians will need to login with credentials. Upon becoming a technician, you will receive a password from an administrator. If you have forgotten your password, you can click the Lost Password. Alternatively, you can send a ticket to the helpdesk support email: support@dissco.jitbit.com or the coordinator of the helpdesk (laura.tilley@cetaf.org)

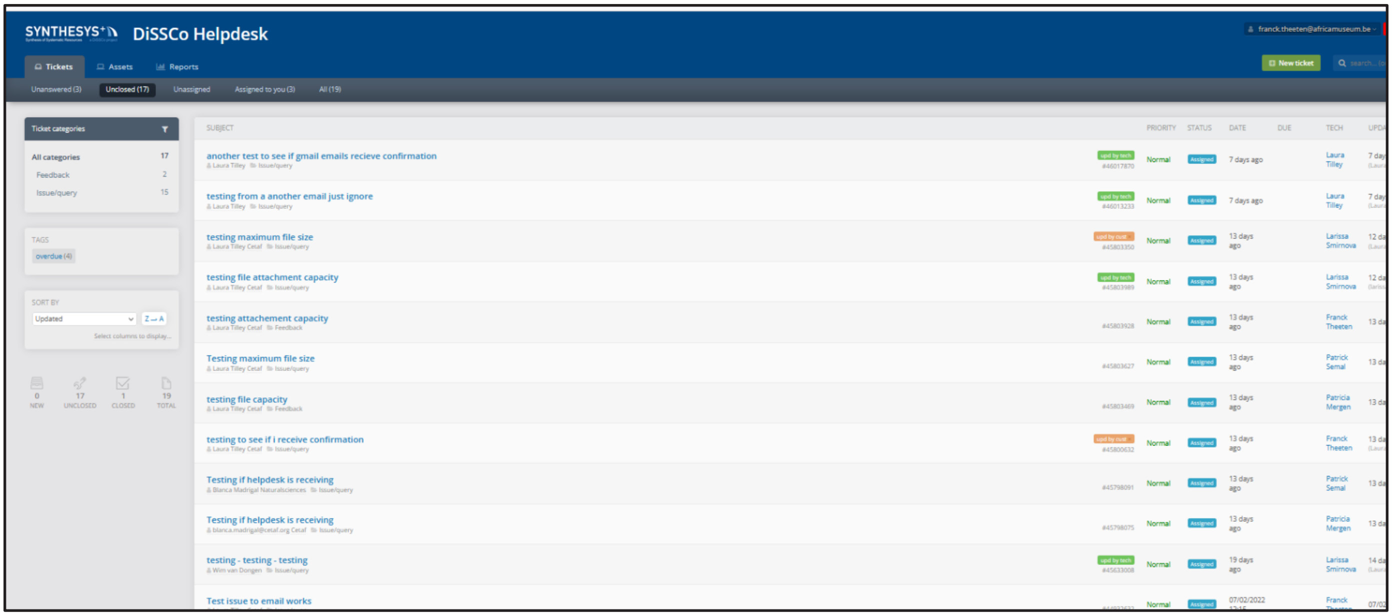
Figure 5 Login page



7.2 Technician view

Once technicians have logged in they should be taken to a main dashboard similar to the one shown in the image below, with a list of any tickets that have been submitted to the helpdesk. With a blue banner along the top saying SYNTHESYS+ DiSSCo Helpdesk and three main tabs (Ticket, Assets and Reports).

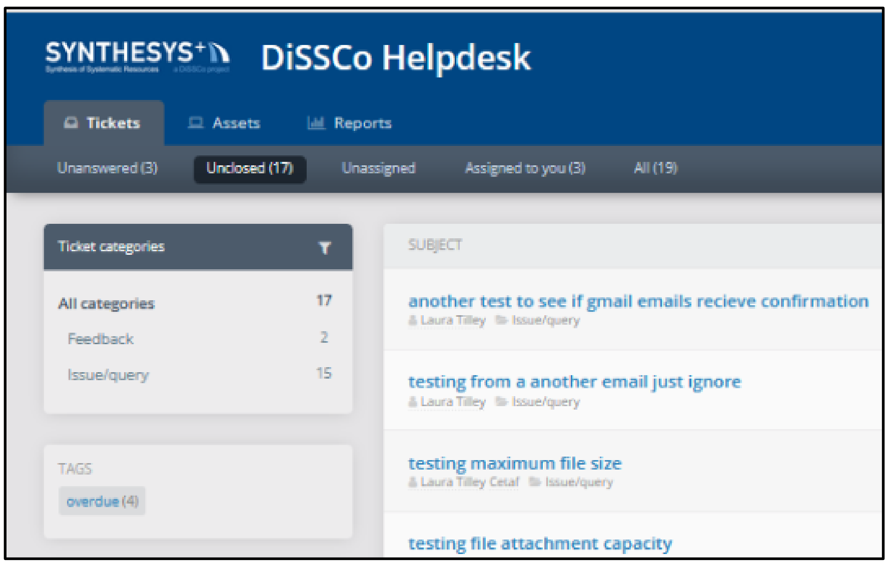
Figure 6 Screenshot of a technicians ticket page.



7.2.1 Ticket filtering

When you click the tickets tab in the top left of the screen (see image 2), clickable options for filtering tickets (Unanswered, Unclosed, unassigned, assigned to you) are presented directly below in a thin grey banner. On the left-hand side below the banner there will be a box labelled ‘Ticket categories’ here you will be able to choose the ticket types you are interested in (e.g., Feedback, ‘issue/query’, etc). The available ticket categories are: ‘Feedback’, Issue/Query’, ‘Virtual access admin’, ‘Transnational access admin’, Technical software issues’, and Feature requests’. In addition, if the tickets have been tagged, then you can filter using the tag name by going to the box that says tag, below the tickets categories box. Tickets can be searched using keywords, or ticket ID via the search box on the right-hand side of the top banne (see image 3).

Figure 7 Zoomed in Screenshot of ticket filtering options.



7.2.2 Changing your profile settings

To access your profile click your name in the top right hand of the screen, a white box will appear with your name, click your name (see Figure 8), in it. Then you should be taken to a page like the one seen in (Figure 9). Click edit to change credentials, language, and colour of your dashboard, password, etc. Also, you can see activity history on the right handside.

Figure 8 Zoomed screenshot of were to access your profile

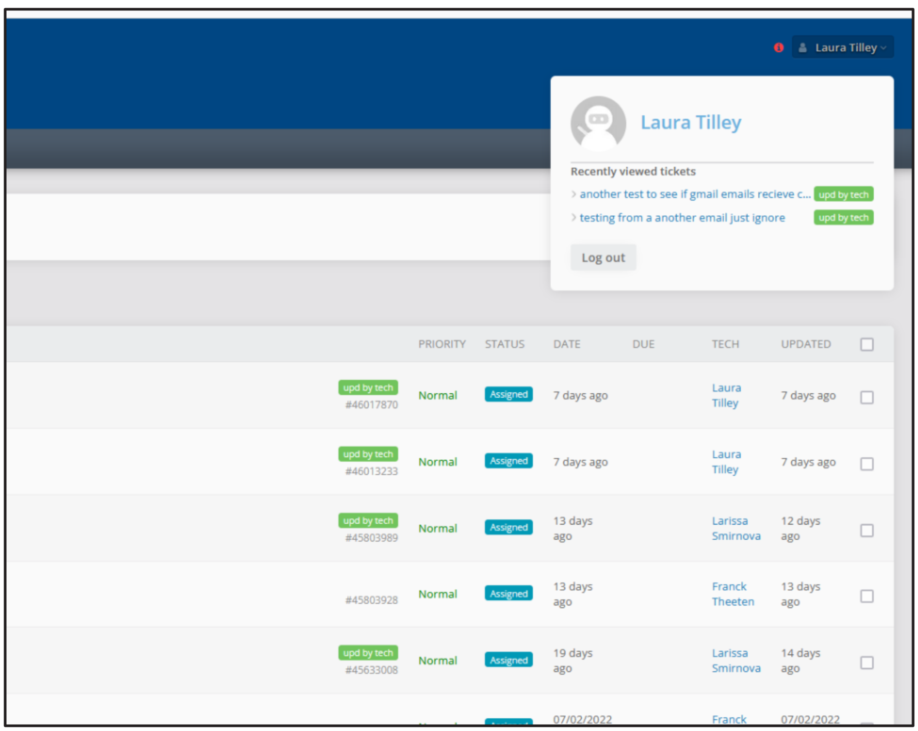
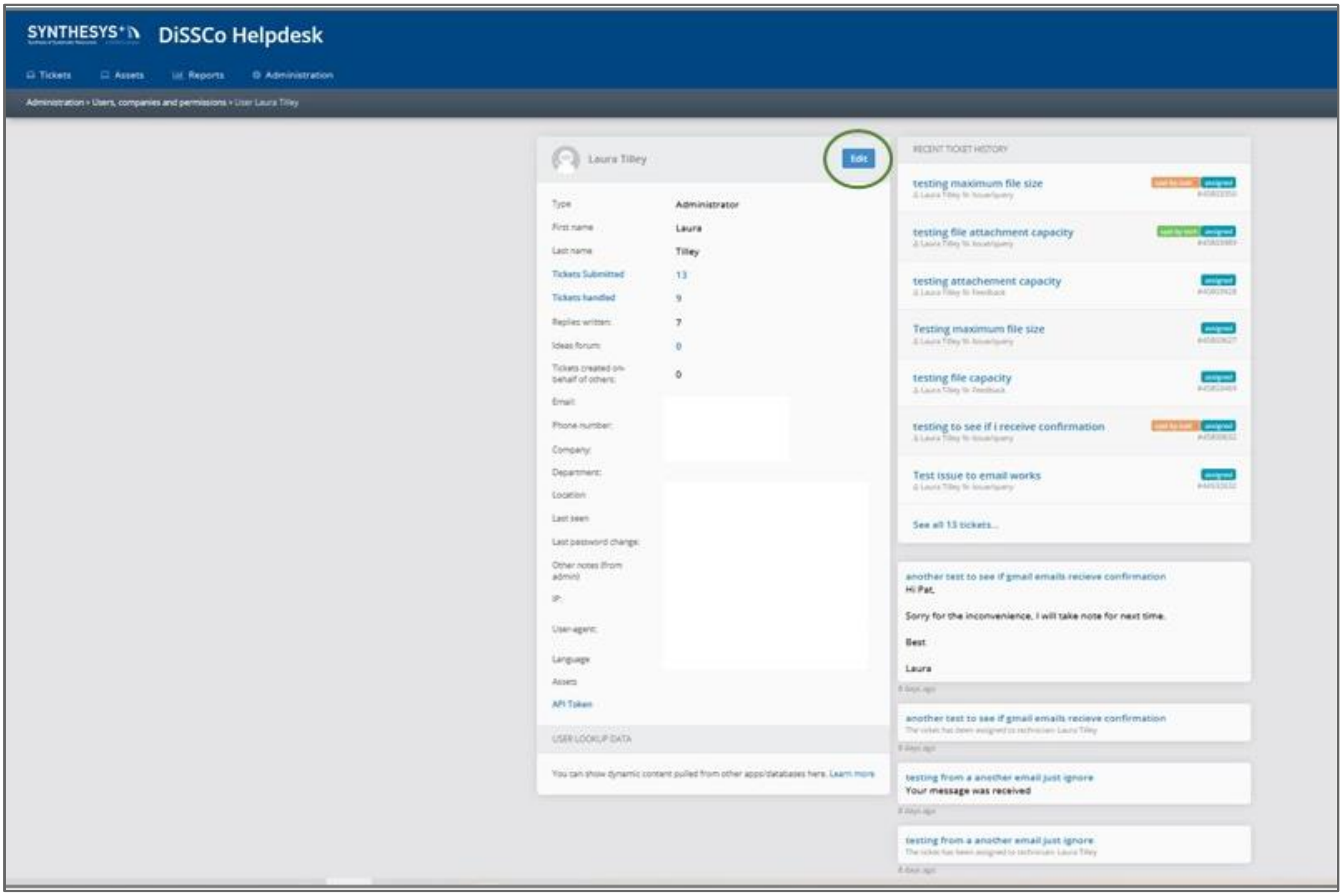


Figure 9 Screenshot showing technician profile page.



7.2.3 ticket (features, and actions possible)

When you click on a ticket you will see the page presented in Figure 10, here you can see the details of the ticket (i.e. the request, any attachments etc.). You can reply by clicking on the reply box, which will expand, providing you with more options (e.g. canned responses, and the ability to add new canned messages. Towards the right of the message box you can see the ticket ID, and the timer date, and who the ticket is from. You can change the priority by clicking on the square with three dots on the far right hand side.

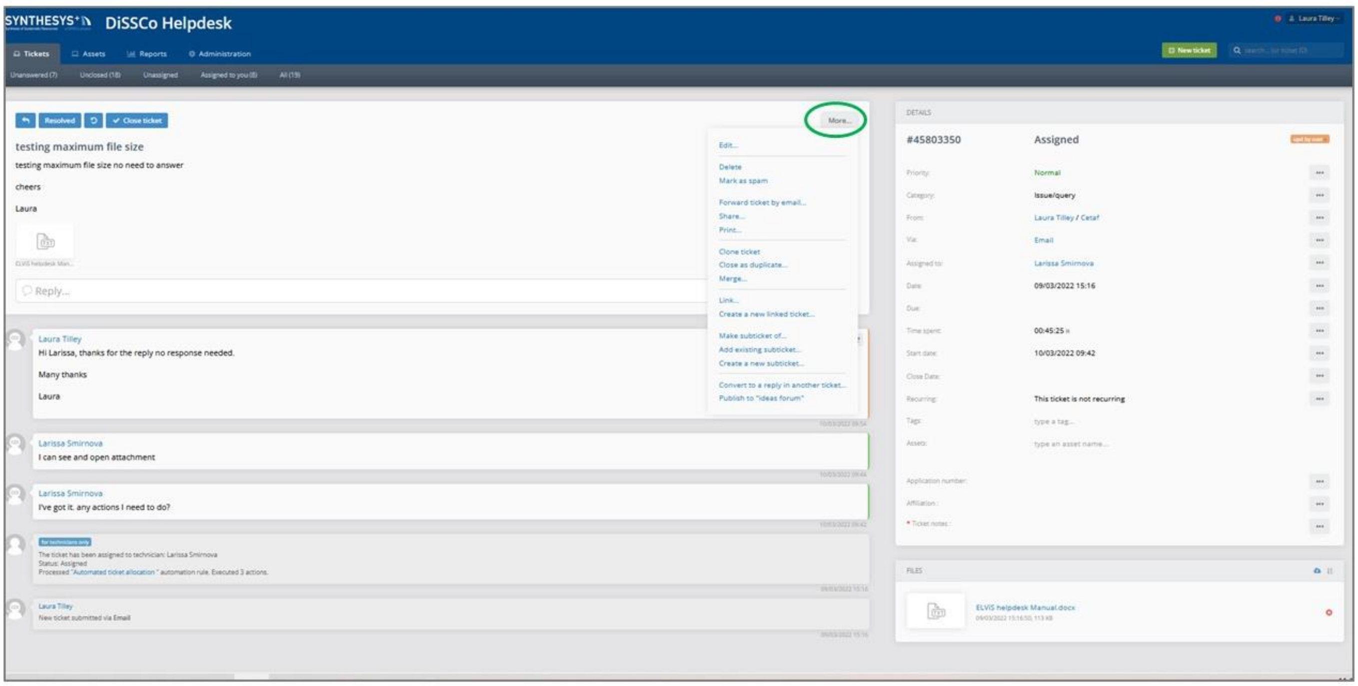
7.2.4 Creating a new ticket within the helpdesk

To create a new ticket in the helpdesk by clicking the green button that says new tickets allocated in the top right hand corner. Alternatively, you can do this within a ticket by clicking on the more button in the right-hand corner see Figure 10 where it is circled in green. Also the more button provides options to split and merge tickets.

7.2.4 Reports

Click the tab ‘Reports’ in the blue banner across the top to make your own reports on activity i.e., how many tickets over the last month, time spent on tickets, the type of tickets etc. You can see the number of tickets for each technician.

Figure 10 Screenshot of what a technician see’s within a ticket.



8. Helpdesk staff training and resources

Useful references

- ELViS user tester manual: https://dissco.teamwork.com/#/files/10915292

9. DiSSCo Knowledge base

To be added.