The User Support Model at CERN

HEPiX/HEPNT Meeting

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Maria Dimou - CERN/ User Services

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- ## The Team
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The Team

The new support model is the product of the work of the following members of the User Services group:

Nicole Cremel
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Bernd Pollerman
Ludwig Pregernig
Hannes Schwarzbauer
David Underhill
Roger Woolnough

The Method

* Several periodical shifts with the helpdesk members
* Brainstorming sessions in the team
* Feedback meetings with the helpdesk and the service managers
* Give the helpdesk more than 10 mins/question to allow more time for solution search
* User interviews and general feedback
* Remedy reconfiguration to introduce Quality Assurance
* Data mining of a big range of past remedy 'problem and solution' cases
* Attachment of a responsible name (Manager on Duty) to every problem
* Input from industry market leaders to define objectives

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Problems identified in recent History

- The Helpdesk staff had no opportunity to buildup expertise with help from the analysts (they were physically apart).
- Training is required in the (outsourcing) contract but there was (is) never enough time for it.
- The three-level model didn't quite satisfy our expectations:
  - **1st:** Helpdesk, 3 members (outsourced operation)
  - **2nd:** User Services' analyst, 6 members, shift rotation (CERN staff and contract members)
  - **3rd:** IT service specialist, (CERN staff and contract members). Those who run the servers and decide what is supported
- Each 2nd-level analyst was specialist in one domain (mail, web, UNIX, windows). This made mutual back-up difficult.
- Problems escalated/assigned outside the remedy domain of User Support were not followed up. This led to user complaints when problems got forgotten (late/no answers).
- No matter where the problem is in the whole chain, the user only sees the entry point and says "the Helpdesk is not functioning".

The aimed new Objectives

Towards the users:

- Achieve 80% 1st call problem resolution and user satisfaction level at 75%.
- Make the ’extra step’ to be helpful and save the user time.
- Check the delays and the style of replies and reopen tickets, when necessary (the "Manager on Duty" does this).

Communication channels amongst supporters:

- Weekly meetings between the helpdesk members, their contract management and the User Services’ supporters.
- Weekly meetings between the User Services’ supporters and the IT service specialists.
- Periodical meetings between User Services’ representatives and the remedy development team.
- Weekly reporting to the IT management meeting for operations (C5).

Manager on Duty (MoD)

- Effective September 2002.
- Tasks:
  - Checks the quality of the reply sent to user (the MoD's name is attached to all problems coming through the Helpdesk) by:
    - Ensuring it is correctly phrased
    - Checking the style and clarity of the answer
    - Reducing useless and annoying e-mail Ping-Pong
  - Helps the Helpdesk staff answering calls where they have problems understanding or explaining, or where they have insufficient time to deal with problems.
  - Coordinates the resolution process with service specialists.
  - Checks why problems remain in the same status for more than 2 days. Remedy generates reminder mails for such cases according to the Service Level Agreements (SLA).
  - Acts as the link between users and service providers. Will contact service providers in case of problems that might be identified by the Helpdesk, the operators or other sources, in order to coordinate user information (news, zephyr messages or other user contacts).
  - Prepares weekly service reports and statistics.
  - Attends the "daily meeting" and other relevant coordination meetings.
  - Keeps a log book for discussion with the rest of the MoD team.

List based on text prepared by L.Pregernig and R.Woolnough for the CERN IT C5 (weekly management) meeting.

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Quality Control and User Feedback

- Offer the users a simple address and telephone number for getting help.
- The Manager on Duty (MoD) helps the users and the helpdesk members alike.
- Reopen 'solved' cases that don't satisfy the users.
- Make technical information available on the web as Questions&Answers (a major update of the Knowledge database is being done, content and structure-wise).
- Plan Remedy reconfiguration soon again to implement checking of answers by the MoD before they are sent to the user.
- Offer the users an additional fallback address (comments, complaints, thanks): *user.relations@cern.ch*

User Support in other HEP Sites

- All sites have some form of helpdesk
- Mostly this is closely linked to the system services' group(s).
- Only CERN outsources.
- All sites have a tool for problem tracking.
- No formal mechanisms to decide on:
  - Quality of the solution
  - Performance of the support team
  - User satisfaction
- No site has a special telephone system.
- Most sites have relaxed escalation procedures.
- Most sites have no SLA for reply times
- Most sites have no Knowledge Database with problem solutions.

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User Support survey

Question\Institute	BNL	IN2P3	FNAL	CERN	LBL	DESY	RAL	JLAB	INFN	CALTECH	CNAF	SLAC
Run a HelpDesk(HD)?	No	Yes	Yes>1	Yes	No but...	Yes	Yes	Yes	1/site	Yes		
HD members	15 sys. admins	3+1	3+GL +experts	2-3	5 supporters	1 dispatcher +15 analysts (Zeuthen) 6 students+5 analysts (Hamburg) all part-time	?	3+2x0.5 students	proportional to the site size	2.5		
Outsourced?	No	No	No	Yes	No	No	No	No	No	No		
Questions/week	10-50	20-30	125	600	25-50	50-100	535	130	?	100		
Number of users	500	2K	3.5K	8K	250	5-6K (Zeuthen & Hamburg)	>>?K	1550	proportional to the site size	>>?K		
Solution OK?	No formal mechanism	User feedback	OK if no user reply	MoD check	OK if no user reply	OK if no user reply	Some random checks	No formal mechanism	OK if no user reply	User feedback		
User satisfaction	Meeting with user feedback	Meeting with user feedback	Not measured	feedback request in ticket	Not measured	User feedback	some questionnaires no follow-up	No formal mechanism	Not measured	No formal mechanism		
HD Success criteria	Annual review with DoE	Not measured	Not measured	aimed 80% resolution at 1st call	User feedback	No formal mechanism open ticket count	?	Mgnt feedback (rare)	Mgnt feedback	No formal mechanism		
Problem tracking system	Yes	Yes, home-made tool	Peregrine (Remedy) ARS	Yes Remedy	Yes WebRT	Yes	Yes Remedy	Yes, home-made tool CCPR	No	Yes Remedy customised		
Special tel.system	No	No	No	No	No	No	No	No	No	No		
Escalation process	Informal Manual	Dispatch in the tool	Phone Pager	in Remedy	Dispatch in WebRT, email,phone	None	Automatically in remedy	Dispatch in CCPR	Informal Manual	in Remedy		
SLA for reply times?	No	No	No	Yes	No	No	Yes Many	No but reply info on web	No	No		
Support staff for desktops?	Desktops not supported	No	Yes	Yes	No	Yes	Yes	No	No	No support other depts for a fee		
Knowledge db?	No	In the tool Not for users	ARS export to Lotus Notes	Yes	No	No	No. Some FAQs/service	No but CCPR search	Yes in some sites	Remedy search		

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Reference Documents

- Present situation:
  - The new IT Helpdesk page: http://cern.ch/it-div/need-help/what-this-helpdesk-does.asp
  - MoD task list, http://ref.cern.ch/CERN/IT/US/2002/003/
  - Desktop Forum presentation on Helpdesk Changes
  - The Knowledge Database http://consult.cern.ch/xfind
- Historical:
  - User questions' flow. Presentation to the LEP experiments http://ref.cern.ch/CERN/IT/US/2000/051/
  - Presentation to a Helpdesk meeting in Dallas http://ref.cern.ch/CERN/IT/US/2001/015/
  - Service Level Agreement with IT services http://ref.cern.ch/CERN/IT/US/2001/018/
  - Service change announcement methods http://ref.cern.ch/CERN/IT/US/2000/040/

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