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Overview

https://helpdesk.eoas.ubc.ca is the Internet/web-facing interface to a help desk system used by the IT Staff of the Department of Earth, Ocean and Atmospheric Sciences at the University of British Columbia. This system is used to manage incoming requests for assistance generated by the department's user community.

The goal of this guideline is to offer insight to the user community what their experience should be when requesting help from EOAS IT (aka. Compstaff). For the EOAS IT staff, this guideline serves to clarify their role and responsibility to each other and the larger community.

Workflow

Start of request

The process begins when someone in the EOAS user community requires help with an IT-related problem. The request is typically generated by sending an email to helpdesk@eoas.ubc.ca or by visiting the web site https://helpdesk.eoas.ubc.ca and filling in the form requesting help that is posted there.

A request for help may also be initiated from a casual conversation in the hallway or during a private email conversation that was initiated due to a topic that is unrelated to the help request.

Capture the problem

A critical element necessary for hte successful resolution of a problem is to capture as much information early on quickly and accurately. A conversation in the hallway should result in the EOAS IT staff recommending that the person submit a new help desk ticket as quickly as possible, or if the user is unable to submit a ticket, then the EOAS IT staff member should submit that ticket on his/her behalf as quickly as possible.

Unassigned Queue

It is the responsibility of all EOAS IT to monitor and pick up requests for help from the unassigned queue in the help desk system whenver possible. EOAS IT staff are expected to spend time, at least once but preferably several times each day, checking their email and/or the help desk unassigned queue for questions. If the EOAS IT staff member can resolve a problem, then he/she can pick up the request by assigning to him/herself. If the EOAS IT staff member recognizes a request can be best resolved by another staff member, then he/she should assign the ticket or bring it to his/her peers

attention so he/she can pick up the ticket.

Once assigned, the EOAS IT person who is marked as the ticket's agent is the primary lead to bring that problem to a successful conclusion. It is critical for the department's user community that a help desk ticket is resolved in a professional and courteous manner, especially during a time when the person requesting help may already be confused or under stress.

Working Together
The help desk offers the ability to post private notes, where another team member may offer a solution or advice to the main agent -- it is critical that any advice or assistance is not **immediately/directly offered** to the person requesting help, except under the most extreme circumstances. Reasons for not bypassing the main agent include:

- The agent may be coordinating several fixes at once, by interfereing it may in turn lead to knock-on effect deterimental to the successful resolution of other requests.
- The lead agent may be aware of specific needs requested by the end-user and by offering help the end-user is subjected to confusing and conflicting information.
- The agent may be consulting with another party to deliver an alternative solution, by introducing a "quick and ready" solution, it could lead to a less optimal result for the end-user.

Situations when it is okay to take control of a ticket
Generally speaking, when one EOAS IT person intervenes in another agent's ticket, it is akin to walking into a conversation part-way, with the same potential for embarrassment due to assumptions and unpleasant behaviour. However, there are times when intervening in another agent's ticket is necessary:

- An agent is sick or is managing a personal issue and is not at work.
- The primary agent has requested assistance or the primary agent and another EOAS IT person have agreed in advance that a request should be transferred.
- The EOAS IT manager exercises his/her judgement and reassigns a ticket to another agent.

For the last point, it is the EOAS IT manager's responsiblity to notify EOAS IT staff involved in the ticket in advance, or if that is not possible, then post a private internal note explaining his/her reason for reassigning the ticket.

Reaching a conclusion
A ticket is resolved when:

- The person who placed the request flags it as resolved.
- The person who placed the request confirms the issue is resolved and the lead agent flags the issue as resolved.
- The help desk system "times out" the request, i.e., the request has sat for three days with no update by either the agent or the person requesting help, and an automated

request from the help desk system has gone unanswered.

In the last bullet point above, it is possible that, should the user requesting help be unavailable and miss the automated notice, that the request can be re-opened by visiting the help desk web site, or requesting that the ticket be re-opened by submitting another ticket by email.

Using snippets

The help desk includes a feature where brief pre-canned messsages can be served as part of the communication thread, these messages are referred to as snippets. Snippets have pros and cons, but applied correctly they serve to inform and reduce the amount of time that the EOAS IT team needs to spend entering important, but also redundant information.

For example, one snippet in the help desk explains the hours we are open and what situation might arise when our doors would be closed when, supposedly, we should have open doors. Someone who wants to visit our offices during walk-in hours, this information is essential, but entering the same information, i.e., when our doors are open, is repetitive and the information contained is always the same -- so a snippet is ideal and benefits everyone.

Where a snippet is not ideal is when there is a personal aspect to the conversation or the information provided is not standardized or repetitive. A snippet can come across as "canned" or impartial, and even when using a snippet it is a benefit for the agent to customize it slightly, for example if an agent knows that someone is unavailable during our normal walk-in hours, the snippet can be customized and options of working outside of normal hours can be offered.