

Report of the Help & Support Review 2008

A. Introduction

This report presents the findings and recommendations from the IS Help and Support Review carried out during March and April 2008. The purpose of the review was to examine the existing help and support services across IS alongside those offered by Schools, and to put forward a set of recommendations on how IT, Library, eLearning and AV help services might be reconfigured to maximum effect.

A Review Panel was brought together comprising IS senior management, an external Chair, the Students' Association VPAA and one representative from each of the Colleges and Support Groups. The terms of reference and Panel membership are set out in Annex 1.

The consultation process involved each of the Colleges, Support Groups, EUSA and the IS Divisions which were invited to input to the Review Panel. These submissions provided the Panel with 40 pages of background information, views and opinions. Following on from this, the Review Panel was convened over a two day period (4th and 5th March) when members met with representatives from the Colleges, Support Groups, IS and EUSA. A follow-up session of the full Panel to agree the list of recommendations was convened on 22 April 2008. The Panel is most grateful for the time and effort taken by all those who provided written submissions and/or attended the sessions.

During the course of discussions, it was recognised that a collection of 'help' words were being used by the different groups to describe help and support services, and that the meanings varied widely, both within IS and across the University. For this reason Section B has been included below which describes the definitions of the terms as used within this report. This section also lists definitions of some of the key components of a help service and defines IS four primary "business domains", namely library, e-learning, IT and AV.

B. Glossary

Term	Definition
Advice	An opinion offered to you about what to do in a specific situation
Business Unit	Part of the business delivering services to its customers
Call	Telephone call to a Service Desk resulting in a service request or incident being logged
Call centre	A unit handling large numbers of incoming and outgoing telephone calls
Change	Modification, addition or deletion of anything which could have an effect on a service
Consultancy	Activity of giving specialist advice on a particular subject matter
Customer	Someone who sets out requirements and targets and pays for a service
First-line	First point of contact for users that is responsible for resolving routine matters and incidents
Help	To make it possible or easier for someone to do something, or by doing part of the work or by providing some answer
Help Desk	Considered more technically focussed but has become synonymous with Service Desk
Incident	Unplanned interruption to service or a reduction in quality of part of a service
IS Help Desk	The present Information Services (IS) Help Desk in the Main Library provides a first point of contact for enquiries relating to library services, computing services and e-learning. The IS Help Desk provides full answers to a wide range of enquiries and refers more in-depth or specialist enquiries to other user and service support teams as appropriate.
ITIL	Set of best practice guidance for IT Service Management (IT Infrastructure Library), and which can be used more widely for service management in other domains
Liaison	Communication between groups, an exchange of information
Problem	The underlying or root cause of one or more incidents
Second-line	Layer used when first-line cannot fully resolve issue Second-line staff usually have specialist skills and/or local knowledge for the handling of incidents and problems
Service	Means of delivering value to customers by facilitating outcomes
Service catalogue	Structured document used to describe the delivery of services and includes deliverables, contact points, prices etc
Service Desk	Single point of contact between the users and the service provider and also handles outgoing communications to the users about planned events
Service Level Agreement	Document detailing agreement between service provider and customer – including definition of service, responsibilities and agreed service targets
Service Provider	Organisation supplying services to a customer
Service Request	Request from a user for information or advice or for a

Support	standard change To help someone in a practical way; to give encouragement
Third-line	Third-line is used by second-line staff to assist in resolving problems
Training	Carrying out the process whereby people learn the skills to do a particular job or activity
User	Someone who uses a service on a day-to-day basis
Web page	A page of information on the Internet

The Four IS Domains

Library	A collection of print and non-print resources, organised, maintained and serviced for users
eLearning	Electronic learning or eLearning is a general term used to refer to computer-enhanced learning. It is used interchangeably in so many contexts that it is critical to be clear what one means when one speaks of 'eLearning'. In many respects, it is commonly associated with the field of advanced learning technology (ALT), which deals with both the technologies and associated methodologies in learning using networked and/or multimedia technologies.
IT (Information Technology)	The study, design, development, implementation, support or management of computer-based information systems, particularly software applications and computer hardware. IT deals with the use of electronic computers and computer software to convert, store, protect, process, transmit, and securely retrieve information.
AV (Audio-Visual)	The term audio-visual may refer to works with both a sound and a visual component, the production or use of such works, or the equipment involved in presenting such works. Movies and television shows are examples of audiovisual presentations. Business presentations are also usually audio-visual. In a typical presentation, the presenter provides the audio by speaking, and supplements it with a series of images projected onto a screen, either from a slide projector, or from a computer connected to a digital projector using software such as PowerPoint.

C. General Observations

The following points were extracted from the written and verbal submissions to the Panel either because they were mentioned frequently or because the Panel felt they were of major significance. These are not listed in a priority or rank order.

- a. The general help available from IS on day-to-day routine issues could be improved, and should be even more user-focussed. Users are not interested in the behind the scenes activities and processes but are primarily seeking an acceptable and timely resolution to their request.
- b. Acknowledgement that the role played by local support staff (those staff employed by the Colleges and the Schools in the IT, library, elearning and AV domains) is extremely beneficial and must be integrated into any changes in IS services.
- c. It would be helpful for users to learn easily what services are available to them, how to gain access to them and where to go when things go wrong and what level of service to expect.
- d. The need for reliable self help web pages which are easy to find and to follow is a top priority. IS web help in particular must be much improved with better navigation and clearer user readable content.
- e. There is a strong preference for communications about service disruptions to be routed via mobile handheld devices, particularly for the student community.
- f. IS must make better provision for innovations and new services as new business demands and solutions become known.
- g. The IT Information Library (ITIL) framework is now widely accepted within the University and the UK HE sector as the way forward on service management issues. There was sound awareness and genuine enthusiasm from all groups to embrace the ITIL framework, with little doubt about its significance and role in this area. Adoption of ITIL should help address issues of the service catalogue, service management processes and communications, monitoring and reporting of key performance indicators.
- h. The current IS organisation structure (dating from March 2007) has resulted in some uncertainties for both customers and IS staff as to the effectiveness of some help processes, and concerns remain with respect to continuing duplication.
- i. Help for distance learners, and more generally help on a 24 * 7 basis, was not seen as the highest priority at present. There was consensus that the other changes proposed in this review would adequately address the key issues; particularly the proposals to display system statuses and communicate planned downtime more systematically.
- j. The whole service around laptops requires re-evaluation and should include procurement, recommendations and a more efficient technical support model.
- k. Incidents occurring on Audio-Visual equipment within teaching areas require separate emergency callout of the specialist support staff. It is impossible for a standard Service Desk to address such incidents effectively.

D. Recommendations

Improve Awareness of IS Help Services

Recommendation 1 – Improve Awareness amongst Users

IS needs to publicise and promote the different strands of help available so that they are available as soon as a new University community member is confirmed. For student applicants this should be via the MyEd portal, and should clearly differentiate between help available off campus from that available on campus.

For new staff and student members arriving on campus the necessary information should be easily found on the University web site and should be included in all induction processes carried out both locally and centrally.

If a School/Unit has chosen to operate its own first-line help service then this should be clearly communicated and publicised so that its members are in no doubt as to what to do and expect should a query arise.

IS help services should be simplified as much as possible from the perspective of user access. There should be a reduction in variations in access channels to minimise confusion as well as the need for specific user education.

Recommendation 2 – Improve Awareness amongst IS and School/Unit staff

It is vital that IS first-line staff and School/Unit first-line staff work well in tandem so that confidence in the Help Services remains high. It is recommended therefore that induction programmes for these staff are amended where necessary to take this into account. It is also important that an ongoing programme of awareness-raising is established whereby staff can easily network and interface with other first-line help staff to keep aware of current arrangements and changes to services.

IS help staff need to be fully aware of services offered by Schools/Units so as to handle and route queries effectively.

Embracing the ITIL framework

Recommendation 3 – Adopt the ITIL framework for service management improvement

(For readers not already conversant with ITIL see <http://www.is.ed.ac.uk/itil/>)

IT Information Library (ITIL) is universally recognised as a best practice framework for IT service management. Since IS launched its programme of ITIL awareness and certification in April 2007 it has become clear that the framework and disciplines are very well suited to all IS services, and indeed service management in general. By adopting this framework and adapting it to suit University requirements there is a ready-made solution to many of the challenges faced with providing help services. There is considerable value to be gained by staff in Schools/Units and staff in IS all working to the same service management processes.

The ITIL Service Desk function, together with the Incident Management and Problem Management disciplines, encompass the majority of the user processes required. The Service Level Management discipline provides the other key ingredient with regard to customers as this discipline addresses the service catalogue and agreements on monitoring and measuring service levels. The other service support disciplines can provide essential

information for service managers and service desk staff e.g. improved communication of changes, better quality releases of new or enhanced services, knowledge database of past errors and trend analysis.

IS should consider carefully how this programme of improvement is managed, either by establishing a new “Quality Manager” role, or by tasking the IS Quality Enhancement Group (IS-QEG) with oversight of this area. The ‘manager’, or IS-QEG, would have responsibility to lead on all service management related issues, not only ITIL awareness and training, but also process review and implementation.

Recommendation 4 – Publish and maintain an active Service Catalogue

One of the main criticisms during the review from users was a lack of understanding of what services were available to them. IS should establish, publish and maintain a service catalogue which confirms the services and related support service levels expected. Schools/Units would be strongly encouraged to join in and publish their local services in a common catalogue, for the benefit of the user communities.

It is envisaged that this user-focussed catalogue will be extended to include other centrally and locally supported services, to produce a complete portfolio of all University IT, Library, eLearning and AV services for all types of users.

The Service Catalogue will contain drilldown links to more detailed support information where applicable.

The New IS Help Service

Recommendation 5 – Redefining the IS Help Service

The new IS Help Service will consist of three modes of interaction for all University members and other authorised users of IS services. Users will be able to select the most appropriate mode depending on their location, the time of day, personal schedule and the nature of the issue arising. All three modes will reference the same relevant information about all IS services so a consistent service is achieved.

- a. IS Self-Help material
- b. IS Helpdesks allowing walk-in, face-to-face interaction with support staff at multiple locations around the campus. These Helpdesks should be labelled as “IS Helpdesk@[location]” to give them an unambiguous identity. Every effort should be made to ensure that consistent services are on offer.
- c. IS Helpline for email or phone interactions, regardless of location using one email address and one phone number. The larger IS operations at the Main Library (George Square) and the Darwin Library (King’s Buildings) will form the heart of the Helpline effort, and the goal will be to extend hours of service as much as possible.

Recommendation 6 – Provide relevant, up-to-date and clear Self-Help

The provision of comprehensive, high quality and high usability self-help materials is a matter of urgency. These materials will be primarily online but backed up by text-based/other formats as appropriate. A programme of awareness-raising about the existence and routes to access these materials should be developed, evaluated and maintained. The content of

the materials should be updated by means of analysis of first line and second line queries. Once online materials are available and robust, the IS Help Service should reference these in responses to users rather than giving the answer direct, thus promoting the accuracy of the materials and making users more aware of their existence.

Also, in line with Recommendation 4, a self-help page showing current status of main services should be displayed and maintained. This will assist users and support staff to check easily for the known status on any system, particularly when offsite.

Recommendation 7 – Develop a network of IS Helpdesks and establish an IS Helpline

The IS Helpdesks and IS Helpline should deliver a co-ordinated help service across all IS sites. The success of the service will be dependent upon:

A single mechanism for call management (see Recommendation 11);

Clarity for users of hours of operation, especially for the various Helpdesks which will inevitably operate different opening hours/days. It is likely that it will be possible to staff a Helpline for longer hours/days than physical Helpdesks;

The provision of a knowledge-base so that Helpdesks and the Helpline can inform their responses from a single information source;

The quality of training and support for Help Service staff. All such first-line staff will require excellent inter-personal skills, together with reasonable business awareness and knowledge across all the domains. This will ensure that they can communicate well with users and other support staff, and are capable of making judgements on the priority, severity or impact of any request.

To improve the user experience, in so far as is possible, firstline help in Schools and Units should be integrated into or coordinated with, the IS Helpservices.

Recommendation 8 – Identify and confirm the second-line support network and its management

Separate from the Helpdesk and Helpline there will be a large network of staff in both IS and Schools/Units who can provide second-line support when the first-line help is not able to resolve, does not have the appropriate knowledge or access rights, or perhaps a severe incident has occurred which has not been encountered before requiring expert assistance. It is envisaged that second-line support would include, amongst others, the current College and Liaison Librarians, the IT Support Teams, and eLearning Team. These second-line staff will have expert knowledge in their domains.

Second-line support staff will be expected to carry out a wide range of responsibilities relating to services on offer within a specific IS domain. This will cover advice, consultancy, liaison, setting specifications, procurements, installations, training, project management, project development and testing etc and consequently the level of resource allocated to second-line support needs to be monitored closely.

Services are more oriented around the IS domains and are adapted to Colleges and Support units' needs and structures. The managers of all staff involved with second-line support will monitor activity to ensure that a sensible balance between reactive second-line service support and proactive service delivery tasks is achieved.

Secondline staff will log the outcomes of calls and requests passed to them from firstline, or directed straight to them, in the CMS (call management system) thereby enhancing the knowledge base.

Second-line staff themselves may well require advice and assistance, and they may therefore need to call on colleagues in a third-line capacity whilst still owning responsibility for the call on the CMS system.

Recommendation 9– Ensure effective communication of Service Alerts, Announcements, and Status Updates

All communications to customers and users of IS services must be issued through the IS Help Service to ensure consistency in channels used and to ensure that the IS Help Service is fully aware of what is happening. This will ensure that the content is presented clearly and effectively and that every effort is taken to identify the full impact of any service change.

New services or enhancements to existing services should not be introduced/launched until adequate training and explanation has been passed from the IS development staff to the IS Help Service, thereby ensuring that calls and requests can be handled efficiently without having to consult with the developers/builders/experts.

IS should review its communication strategy for users, taking into account changing needs, such as receiving announcements easily on mobile devices.

Help in Schools and Other Units

Recommendation 10– Schools/Units to declare own help layers

It is recognised that in order for Schools/ Units to choose the IS Help Service as the first line help for their staff and students, the Service needs to be of a high quality to attract the necessary buy-in. Where a School/ Unit considers it necessary to provide first-line help services these should complement the IS Help Service, ensuring that users have a consistent experience. Establishing a “first-line forum”, where standards and experiences can be communicated across all staff with responsibilities within this discipline, is advised.

Similarly, staff in Schools/Units responsible for second-line support services should be clearly identified to the IS Help Service in order that calls can be managed and routed seamlessly between the two areas. Several Schools provide their own IT help to staff and students, and also offer specific facilities, such as computer labs, VLEs and AV.

A new collaboration vehicle at both first and second line will be InSite (the new IS Intranet) in which areas involving technical and service information will be opened up to first-line and second-line staff in Schools/Units.

The Next Steps

Recommendation 11 – Procure a Service Management Software package

IS must ensure that its Service Management System is fit for purpose and is used by all staff to manage incoming requests for help. This will ensure that appropriate data are gathered to enable analysis on a regular basis to support service improvements.

There is a high priority to replace the in-house CMS with a new integrated software management suite. This would replace the existing call and incident management systems, and also provide much needed knowledge management capability, key performance indicator (KPI) data and modules to enable integration of any of the other ITIL disciplines as required.

Modes of operation b and c set out in Recommendation 5 above, will result in the registration of queries on a Call Management System in order that these can be tracked, monitored and reported. One of the main responsibilities of first-line staff is to resolve queries or events as quickly as possible to the user's satisfaction, not necessarily address the root cause of every incident. The emphasis is on user satisfaction and providing fixes and workarounds to reduce the length of disruption to the user.

Recommendation 12 – Establish IS User Services Organisational Structure

Responsibility for first-line help within IS sits primarily, but not solely, within the two User Services Divisions formed in summer 2006. There are staff members in these divisions who also have responsibilities for second-line support and service management across three of the domains (Library, elearning and IT, but not AV which is managed and supported by sections in the IT Infrastructure Division).

As a matter of urgency, IS needs to agree and implement an organisational structure which can facilitate the recommendations from the Panel and deliver the required outcomes, whilst ensuring continuity of service to users in all domains.

Management for the AV domain should remain with the IT Infrastructure Division and the special emergency support should be maintained to assist users experiencing difficulties with AV equipment.

Recommendation 13 – Address IS staff training and development needs

It is recognised that it will be necessary for some IS staff to be retrained/re-skilled and this will be given a high priority. It may also be necessary to begin a process of recruiting new IS staff with the required skills.

Recommendation 14 – Re-evaluate help available for laptops

Significant discussion took place regarding the overall provision of help and advice on laptops. There is no doubt that these devices require a level of support beyond what we are experiencing with other workstations for both staff and student communities. IS should re-evaluate current advice on standards and current arrangements to eliminate unnecessary duplication.

E. Summary (To be added)