Researcher-Facing call, 2020-01-09

Please join us via Zoom Meeting Room: https://zoom.us/j/3816547290
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Meeting ID: 381 654 7290

Topic: Sharing strategies to handle increasing number of help requests from research community

This sessions will be dedicated to discussion some challenges related with increasing number of challenging help requests and some strategies various institutions apply to handle these requests.

Abstract: The number of help requests (tickets) from the research community has been increasing over the past years. At the same time, the questions have become increasingly complicated. This open discussion will be an opportunity to share experiences across institutions on strategies to handle requests.

Please note that we WILL record this call

Agenda
Announcements
Sign-In (Name / Affiliation / Email)
Notes from the call
Discussion Notes
Notes from the chat

Agenda

Welcome and Introductions (Bob)
Call topic ideas -- please contribute
Introduction of topic and discussion questions (Katia)
Discussion around Pre-selected Questions (please answer down in Call Notes)

- How do you handle a large (increasing) workload of tickets?
- How do you prioritize (if at all) the requests that come in?
- How do you communicate with users about acknowledging your center?

Additional Community Questions
Announcements
Call Close

Announcements

PEARC20 Technical Paper Submission deadline February 17th CFP

PEARC20 Program Committee Volunteer interest for technical paper submission review - sign-up form https://bit.ly/pearc20-invite

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Notes from the call

Please prefix your answers with your name / initials

How do you handle a large (increasing) workload of tickets?

(Janna) Extensive documentation around the topics we see the most; also did video snippets

(CarrieBrown) we developed a FAQ based on repetitive tickets we saw which resulted in a decrease in common tickets/questions; also try to make things self-service - our student workers also help out with tickets, support and install requests

(BobF) We routinely review tickets and see what we need to turn into documentation or training topics so that we can only speak to the not-so-common

(KevinColby) Agree 100% with Janna on documentation, and we put a lot of effort into having this, both for users to read and for us to refer them to when they ask questions (as Anita points out below). We also put a HUGE amount of effort into self-service services, even doing a lot of in-house development (as Carrie). For deep questions, we try to focus on the specific issue at hand and just get them over that hump. If they want a deeper engagement, we will do that, but we are now starting to negotiate what that will look like on a sliding scale of deliverables/goals vs. acknowledgement/paid service/written staff into grant. Also have "coffee hours" to provide drop-ins to where the users are.

(Anita Schwartz) Documentation also based on analyzing tickets and trying to even use examples or solved cases as “recipes” to allow people to be more self-sufficient. However most of the documentation ends up being used by our support staff to link to because clients don’t like to read. This helps for initial consultations. We use TeamDynamix and are in the process of setting up integration for Research clients.

(CJC) Trello has a checklist for things like adding accounts, user training, etc.

Anita Orendt (Utah) As with Janna and CB - documentation, videos, FAQ - then often just provide links when answering tickets then ask them to look there and come back if they still have questions.

(jess vera) As a new facilitator I am in the process of learning to troubleshoot issues that users email in and have made it a point to document in my response to users all the steps (and commands used) that I took to get more information about their issue. This hopefully has a two-fold impact: 1.) it reinforces my training and 2.) it teaches the user the steps they can use the next time they encounter other (or similar) issues

(Lauren Michael, Wisconsin) We meet with users at the outset, which not only allows us to give personalized advice and correct misunderstandings/knowledge gaps (that would otherwise leave more/later help requests/questions), but also amplifies and accelerates the impact of our resources/services *per staff effort*. (It also helps inform our online guides to tackle the most common knowledge gaps and encourage self-service.) We also offer Office Hours, which can allow us to help more than one person at a time (even more than one per staff member) and in-person conversation at office hours is often more efficient than email back-and-forth for some help discussions. In the rare case that we have idle staff, they can still work on email requests. (added 450 user accounts last year;5-10 per FTE per week; Zoom options)

(Erin S) We recently pulled the docs off the website and put them all on a “public” google site and made them community editable. Our documentation publishing is way behind what we have written.

(Tobin) Instructional sessions!

(Mark Hart) Similar to Tobin, we recommended our cluster support folks take some of those instructional sessions as well as the top topics from their support tickets and create a few video-based tutorials to answer those immediate ‘how do I sign in’ and ‘how do I load a software module’ kind of thing. Really helps for consistency and for clients who have English as a second language.

(CatherineBM:) We used "canned responses" in the ticketing system (We use Best Practical Request Tracker) for common questions. Have about 30 of them

(Janna) Also use a slack channel for certain groups of users (around genomics) to answer their own questions. Also help build community to support each other.

(MaggieM) Offer as much self-service as possible. We run a user portal for signing up for accounts, adding groups, resetting passwords, viewing submitted tickets. Use an FAQresponsein auto-reply for incoming tickets, this cuts down on 'how do I reset my password' level tickets. Push our documentation in ticket responses so that users are aware and encouraged to look there first next time. Sometimes in the reply, sometimes we'll add a 'Related URLs' at the end of the reply to gently push them. We offer regular weekly office hours (Wed. 12-3pm). We are adding videos: We're making small videos that can be put in a playlist to create longer videos. So for example, login, password, vpn, all can be made into a larger Getting Started video playlist.

How do you prioritize (if at all) the requests that come in?

(Wim C.) For not urgent ones: If it doesn’t take much time I do it on the spot. Otherwise I set some time aside. For urgent ones I try to solve them as soon as possible.

Anita Orendt - adding to Wim - we have 4 people, we schedule the work day into 4 hour window where one focuses on tickets - so each have 2-3 blocks/week, allowing others to focus on other aspects of workload

(CB) - Similar to Anita - One staff member serves as “Ticket Wrangler” and are responsible for triaging tickets and answering “menial” ones. The duties rotate regularly among all staff.

(Erin S) The facilitators do not have root so that helps with triage within the support team (i.e route those that need root access to sysadmin). Some questions, about purchasing nodes, e.g., can only be answered by 1-2 people in the group.

(Cyd B) Most often by urgency or engagements that we are already involved in. New requests, non-urgent requests prioritized lower. Regardless of priority, our SLA has us responding within 24 business hours

(Anita Schwartz) We have set expectations for certain responses for new accounts, etc. More difficult problems are triaged based on availability of staff time. We don’t have staff to assign for long term projects at the current moment to be charged out for grants, etc. We used to do what Anita from Utah did, but we don’t have enough people with similar skills to respond to any ticket that may come in.

(Ted Cabeen) Remember the quadrant of impact/size, trying to prioritize big projects with big impact over small projects with small impact. he Eisenhower Matrix goes along with what Ted said as a manager with Urgency as an axis, rather than time needed: https://miro.medium.com/max/434/1*cm6Sml3avODJcCuy6k0AMA.png

(MaggieM) We have a rotating specific person each day who is our ticket triage/distribution person (we call them the ‘RT cop’ for historical reasons.) They do the ones they can/have time for, but they also find owners for incoming tickets from the staff (usually via Slack). We also have certain queues that are watched by a group (Operations, software, etc.) that tickets can be blind dropped into. We have scrips in RT that notify watchers of those queues that new tickets have arrived. (automating account creation and approval reduced our load significantly) We ingest about 6,000 tickets a year, about 4,900 are user tickets (as opposed to monitoring, engineering and operations tickets.)

How do you communicate with users about acknowledging your center?

(CB) We have boilerplate text on our website for users to use in publications and offer job priority credits for researchers that let us know about their acknowledgements - https://hcc.unl.edu/docs/submitting_jobs/hcc_acknowledgment_credit/
+1 Wisconsin

(MaggieM) We also have boilerplate and periodically mention it to the community as a whole https://www.rc.fas.harvard.edu/about/attribution/ +1 Utah +1 Purdue

(Anita Schwartz) https://sites.udel.edu/research-computing/community-cluster-templates/ but needs to be updated as this was only for HPC and needs to be reworked for general acknowledment for our IT-RCI group.

(BobF) A little unusual, but we don't ask this. It is purely voluntary on the part of the research faculty.

Other Questions

List your questions below so we can all help to answer - please put your name in front of your question.

1. Do you see an increasing number of questions (emails/tickets) from your research community? If no, why not?
2. Do you have different levels/tiers of support?
3. How do you differentiate support between faculty/researchers and students?
4. Do you help users to rewrite/optimize/parallelize their code?
5. How do you handle the questions that require a significant amount of time to answer? (code debugging, benchmarking, optimization, installing a very hard to install software package)
6. Are there cases when you say "no"?
7. What other strategies have you used to mitigate help request volumes?
8. Does your group work with long term projects? Do you charge money?
9. When a significant amount of work is applied working on someone's code do you require or recommend your name to be included as a co-author or in the acknowledgement section? Do you discuss this before you start working on the project?
10. Janna Nugent: Do you ever utilize outside consultants to resolve support requests?
11. Janna Nugent: Does your group employ students to answer tickets directly?
12. Maze Ndukum: would offering group training sessions help alleviate the number of support tickets coming in?
13. Ben Fulton: Strategies for handling office hours? Videochat, a table in the student union or library?
14. Chris Cawley: Mix of GPU/high memory nodes for things like python/AI ?
15. How do you prioritize projects and resource allocation for "IT projects" (i.e. implementing new technologies) versus work that is researcher requested?
16. Are any sites requires to collect ticket info for reporting to senior leadership? If so, what do they do with these metrics?
17. (Claire) How often do people publish a newsletter/news blast?
    a. Erin S: We send a monthly HPC Facilitation email with office hours, workshops, special notes, and other events. Plus the usual 'how to get help'. I can send one to you.
    b. Anita Orendt - we do a "newsletter, with a research highlight then news and upcoming changes, hints etc 3x /year. We do emails to announce news as needed, including announcing training presentations the day before.
    c. BobF - We do news blasts on different topics each week, and then newsletter like every other month. Newsletter is a roll-up of the blasts.
18. (Sergiu): Do you get many custom software installation requests? How do you decide if you need to do it for the users or advise them how to do it themselves? Are containers helpful?

    From Maggie McFee (FASRC) (01:40 PM) We have a software install queue, but the auto-reply for tickets put into that queue has information and links to our 'installing software yourself' documentation.
    From Carrie Brown (01:41 PM) ^ we do exactly the same thing that Maggie mentioned.
    From Maggie McFee (FASRC) (01:41 PM) (we have a standard RT scrip autoreply for all tickets, but when a ticket is moved to a particular queue, the user gets a notification of that with a brief message, but also links to documentation for that area in case they might be able to then help themselves)

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Discussion Notes

Question 1 - increasing number of tickets

CB: came up with the top 10 questions and wrote documentation for it - significantly reduced tickets on those topics; also providing self-service tools so people can solve their own issues
Kevin: developed in-house custom portals for self-service - users can get their own accounts if faculty wants them to get on - systems folks not involved in that.

Setting expectations at the beginning of the consultation engagement so that it's understood what is being provided and what justifies the effort from the consultant
CB: RT lets you set up templated responses for certain questions that are consistent
Tobin: Help documentation isn't always helpful especially for people who are just starting out, an in-person instruction session/orientation can make a difference
Lauren: on-boarding - we meet with everybody who requests a new account to provide an in-person orientation. Provides a high-touch contact. Office hours are also offered - this can be very effective for addressing questions and potentially reduce tickets. In 2018 we added 400 new users and met them as individuals and in groups (2-3 people). Also do repeat meetings when people ask for them. About an hour per meeting. 5 - 10 new users per week. Less about reducing your total effort and more about maximizing the effort you put in
Anita Schwartz: zoom for office hours? Success and engagement?
Lauren: We always offer Zoom as an option for meetings. Virtual meetings are very helpful.
Kevin: we also do coffee hours, go to places on campus where users are near and set up at coffee shops for drop-ins - very popular - a dozen people who are capable of leading one, usually send 2-3 people to a given coffee hour. All paid staff.
Lauren: we have 1-3 people at our office hours - total effort is about 1 FTE for engagement
Janna: slack has been good for connecting people together and encouraging the community to answer their own questions
Christina: redirect into office hours helps with not spending a lot of time answering tickets
Maggie: Playlists and videos for all topics that we can, do them in small chunks so we can playlist them together
(trash talking about Bob :)

Question 2 - Prioritization

Anita: Have a calendar of 4 hour blocks, morning and afternoon, of 4 people each person takes 2-3 blocks a week and then that person does triage, respond to the first level of question. Scheduling is done a week in advance.
Cyd: supporting PIs doing work not necessarily in HPC but in many other areas (perhaps Amazon environment builds, storage needs, workflows, etc). Get an idea if the issue itself is urgent, will it interrupt the research in progress? If so, prioritize it. Otherwise, may wait a day or two and schedule a session. Our goal is to move research forward, so that's our first and foremost goal.
Ted: use a quadrant of tasks: high-impact/low-time/low-impact/high-time -> if it's easy to do and it's high impact, do that right away; if it's hard to do and low-impact, don't do that. Put aside those low impact/low time tickets to make time for those big changes
Christina: do the small things that have big impacts
Ted: could be re-formatting a form to make things easier, improve the process
From the chat: Rotating ticket wranglers, having set-aside time-boxed ticket answering time built into the schedule

Erin: regarding not having root access as a facilitator - sometimes you can't tell if a ticket requires root - in this case root access ticket resolution is answered by a different person on the team than the facilitators.
Kevin: spun up a seperate team focused on mid-term engagements, for example if you're written into a grant - a whole range of what that might look like. You have to be ready for those mid-term engagements to come in as tickets.
Dirk: How much time you spend - I always schedule an hour. I do anything they want for an hour, may follow up with a second hour but I always make it clear that any additional support would require a more formal arrangement.
Alisa: When I have a question from a user it looks very simple, and then I ask questions to put the whole picture together - requires research to do the coordination to find an answer. Questions from PIs can seem very straightforward but then I may need to spend a lot of time and then they put me in the grant. Sometimes they request my time directly from my managers and I get assigned to specific projects with money attached to it for my department. Not enough of me to cover everybody - try to delegate as much as possible to other groups.
Kevin: watch your accounting on this, if you end up having people dedicated to projects make sure the funding can be used to hire more people
Anita: Princeton has a software development group for research computing. Our motto is that we're supposed to make other people successful, we try to listen and provide input about how we can set them in the right direction with the limited resources that we have. We would like to hire people to do that.

Notes from the Chat

Chat notes:
13:26:35 From Ryan Echlin : We also offer office hours here at Michigan Medicine - the face to face time has been very effective in building relationships.
13:31:23 From Wirawan : Has anyone tried to leverage students as helpers to answer support questions?
13:31:30 From Gil Speyer : Anyone tried opening up a slack channel with the user community?
13:31:55 From Carrie Brown : Yes, our graduate student is extremely helpful with answering tickets and we have a great undergrad who has helped a lot with workshops and drop in support.
13:32:14 From Christina Koch : If you've done the above (used students or slack) and can add to the notes, that would be great!
13:33:45 From Mark Hart : Any concerns on a public support forum like Slack where someone might give an answer that works, but it isn't really the best solution?
13:33:55 From Ben Fulton : How do you publicize office hours so people know you are there?
13:34:54 From Christina Koch : agree w/ Janna about slack - most labs I know seem to have one.

13:35:32 From Ryan Echlin : We tried to negotiate an enterprise contract for U of Mich with Slack, and Slack was not interested in offering a reasonable price to us. Has anyone else had a better experience?
13:35:45 From Ryan Echlin : Right now, it's just a bunch of ad hoc accounts
13:35:45 From Bob Freeman : Also a great idea to send out tips thru a newsletter or news blast
13:35:50 From Bob Freeman : Or with maintenance emails
13:36:06 From Lauren Michael (Wisconsin) : @Ben, we have a 'Get Help' page that features Office Hours fairly prominently. We also direct some people to office hours for longer conversations. Users also get frequent-enough updates when we have to notify a 'downtime' in office hours (like for holidays, other staff outages, etc.).
13:36:58 From Ben Fulton : Indiana U has an IT enterprise Slack. No clue how the negotiations were done.
13:37:02 From Claire Mizumoto : How often do people publish a newsletter/news blast?
13:38:52 From Bob Freeman : We do news blasts on different topics each week, and then newsletter like every other month. Newsletter is a roll-up of the blasts
13:38:59 From Sergiu Sanielevici : Do you get many custom software installation requests? How do you decide if you need to do it for the users or advise them how to do it themselves? Are containers helpful?
13:40:04 From Em : At CWRU, we rely almost exclusively on email, rather than tickets. However, the university is looking to implement a new "ITSM" for managing "clients". Doing researcher support through a business software environment is a disappointment. At least there is an opportunity to influence our selection of a new software.
13:40:22 From Maggie McFee (FASRC) : We have a software install queue, but the auto-reply for tickets put into that queue has information and links to our 'installing software yourself' documentation.

13:41:38 From Carrie Brown : ^ we do exactly the same thing that Maggie mentioned.
13:41:58 From Maggie McFee (FASRC) : (we have a standard RT scrip autoreply for all tickets, but when a ticket is moved to a particular queue, the user gets a notification of that with a brief message, but also links to documentation for that area in case they might be able to then help themselves)
13:42:14 From Wirawan : To ErinS: you said facilitators do not have root access, then said that it helps with triage. in what way?
13:42:42 From Maggie McFee (FASRC) : Carrie - RT LIFE! ;)
13:45:28 From Maggie McFee (FASRC) : The Eisenhower Matrix goes along with what Ted said as a manager: https://miro.medium.com/max/434/1*cm6Sml3avODJcCuy6k0AMA.png
13:48:15 From Bob Freeman : Gives us better opportunities for coaching (teach to fish)
13:48:31 From Bob Freeman : ^^ we don't have root either
13:50:40 From Dirk Joel-Luchini Colbry : I can talk a bit about helping users
13:50:53 From Anita Schwartz : Currently UD doesn't have the resources to do this but a new group like Princeton is being investigated.
13:51:27 From Alisa Kang : I can talk a bit

13:52:59 From Anita Schwartz : I can elaborate on what UD does by setting boundaries, etc. with respect to this.
13:53:37 From Christina Koch : anita, we'll have you and then Bob, I'll hand it off to you for the wrap up.
13:54:41 From Tobin Magle : Have to run, bye!
13:57:03 From Christina Koch : And I'm sorry we didn't get to the software comments in the chat!!
13:57:11 From Anita Schwartz : This was an awesome session and glad it is recorded too!
13:57:19 From Carrie Brown : +1
13:57:32 From Bob Freeman : Sign in : https://docs.google.com/document/d/19sHD2Er9WE6c5SSUrklA1qaKZL1DWIKCCBKOG4ir5cE/edit?pli=1#
13:57:34 From Christina Koch : But that's definitely relevant — your strategy for handling software can have a big impact on how many tickets you see and how long they take.
13:57:53 From Kevin Colby : Absolutely seconded on software. It's huge.