The future of eResearch user support

April 2013
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AAF Australian Access Federation
Provides a common authentication framework for eResearch Services

AeRO Australian eResearch Organisations
Operate as a national association of eR providers by advocating eR

CAUDIT Council of University Directors of Information Technology
Provides strategic direction and leadership
Let’s look at the problem

- User support in a federated environment is difficult – can go wrong in many places.
- A Federated environment is where a centralised entity holds things together (eg AAF, 100 Services)
- What can go wrong? Many things... e.g. Genome Researcher in Uni of WA accessing Genomics Virtual Labs.
Let’s look at the problem

• Simple task of logging in... where can things go wrong? Four or potentially more areas where it can fail
• If it does fail, how does the researcher know what failed and who to contact?
• More often than not, support is requested in the wrong place
• This is just one of many support issues facing researchers... So how are we addressing them?
Service Desk engagement

AAF & AeRO engagement

Service Provider package

AAF event communications

AAF software recommendations

Coordinated/joined-up support channel

Tier 0-3 focus (self help to technical knowledge)

Knowledge sharing and collaboration

Proactive event communication

Service Provider improvements

User eXperience focus

Open Support Repository

Improved templates and protocols

User eXperience specialist services

Service Provider support development

Guiding Principles for Frameworks
1. Service Desk Engagement
   Package to assist Service Desks to provide enhanced support

2. AeRO Engagement Strategy
   Strategy to improve AAF & AeRO communication

3. Service Provider Package
   Providing streamlined support to SPs

4. Event Communications
   Proactive alerts to users when major events occur

5. Software Enhancements
   Recommendations to improve the user experience

AAF Service Desk Framework
Researchers
Support Staff
Service Providers
ESCALATION PROTOCOL

Tier 0 User
- Incident Identified
- Search Knowledge Base
- Was the Incident Resolved?
  - Yes
  - No
- Contact Service Desk

Tier 1 Institutional Service Desk
- Receive Incident and Confirm AAF or Related Incident
- Search Knowledge Base
  - Yes
    - Response Managed in KST
  - No
    - Template Available in Procedure Document
    - Discuss/Triage with Internal Research Support and Complete Incident Template
- Provide Assistance

Tier 2 Institutional Research Support
- Provide Assistance

Tier 3 Institutional Research Support
- Receive Incident
  - Type of Incident
    - Security
    - Other
- Provide Assistance

Authentication = verification of user entity
Authorisation = access level control
Other Incidents = everything else

Complete Response Template and Send

Template Available in Procedure Document

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KNOWLEDGE BASE

End Users and Researchers

General Information
- What are the contact details for my local Service Desk?
- What is the Australian Access Federation (AAF)?
- Who should I contact if I have issues?

Accessing a Service
- I have specific questions relating to the data of a particular Service
- What services are connected to the AAF?
- I have moved/switched institutions or organisations and want to access...

Usernames and passwords
- How do I log out?
- What is an “AAF” or “Shibboleth” login?
- How do I change my password?

Virtual Home Registry (VHR)
- What is the AAF Virtual Home Registry (VHR) and is there a user help guide...
- How does a new user meet the VHR assurance levels?
- How many password attempts do I get before my VHR account is locked?
Staff Training Package

Information on the Australian Access Federation (AAF)
For Service Desk staff
If February 2013
Visit us online: aaf.edu.au or contact: enquiries@AAF.edu.au

What is the AAF?
Essentially, the AAF provides authentication through a central point for login into a number of different eResearch Services using existing organisation usernames and passwords (e.g. johnno1 / Password1):
• All Australian Institutions have connected to the AAF which means all current staff and students can log in to eResearch Services using their current username and password.
• A number of different organisations supporting eResearch (e.g. CSIRO) have also connected to the AAF which provides their Researchers with access to eResearch Services.

Providing End-User Support
Knowledge Base
• AAF hosts a Knowledge Base with answers to the most common end-user queries: http://support.aaf.edu.au/home
• Your Service Desk scripts/procedures have been provided to your Manager for distribution and is also included in this presentation for viewing.

Roles
• Service Desk Staff within Institutions will provide Tier 1 & 2 support
• The data-based Australian eResearch Organisations (AeRO) will provide Tier 1 research support. AeRO have knowledge and a general understanding of eResearch tools and services.
• The AAF or individual Service Providers will provide Tier 3 technical support.

Providing End-User Support
Escalation of Incidents
When internal and cross-organisation escalation is required, follow the protocol available on this link. This outlines the activities each role is to perform. You will be responsible for answering queries and escalating incidents to the correct area as per the escalation protocol.

What is the AAF?
A Service Catalogue outlining the connected eResearch Services is available here: http://www.aaf.edu.au/servicecatalogue/ (NB not all Services are shown due to privacy reasons)

Watch the 3 minute AAF information video for a demonstration of the AAF’s core service by clicking here or on the video player here →

“We see the AAF as an enabler for sharing all manner of fragile, dangerous, rare and geographically remote equipment between research organisations.”
Michael O’Leary, Manager, University of Technology Sydney

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SERVICE DESK ENGAGEMENT
PILOT PROGRAM

Institutions:
• University of Newcastle
• University of South Australia
• University of Western Australia
• Victorian University

Feedback:
• Seamless integration with existing processes
• Material easy to understand
• Reduces admin work/document manageability
• Provides direction for the sector

AeRO Members:
• eRSA
• Intersect
1. **Service Desk Engagement**
   - Package to assist Service Desks to provide enhanced support

2. **AeRO Engagement Strategy**
   - Strategy to improve AAF & AeRO communication

3. **Service Provider Package**
   - Providing streamlined support to SPs

4. **Event Communications**
   - Proactive alerts to users when major events occur

5. **Software Enhancements**
   - Recommendations to improve the user experience

   - **1.1 Memorandum of Understanding**
   - **1.2 Escalation Protocol**
   - **1.3 User scripts**
   - **1.4 Service Desk Staff Training Package**
   - **1.5 Service Desk Engagement Strategy**

   - **5.1 Software Recommendations**
   - **5.2 Collation of UX Reviews**
   - **5.3 Usability Guidelines**

   - **4.1 Event Communications Strategy**
   - **4.2 Event Communications Protocol**
   - **4.3-4.6 Selection of Event Templates**

   - **3.1 Registration Checklist**
   - **3.2 Service Outage Protocol**
   - **3.3 Service Catalogue opt-out Protocol**
   - **3.4 New Service Addition Form**
   - **3.5 Subscription Application Form**

   - **2.1 Engagement Plan**
   - **Technical Workshop**
   - **Research/Workshop**

Indicates component linkage
Guiding Principles for Frameworks

**AAF Service Desk Framework**
- Service Desk engagement
- AAF & AeRO engagement
- Service Provider package
- AAF event communications
- AAF software recommendations

**AeRO ICT Support Framework**
- Coordinated/joined-up support channel
- Tier 0-3 focus (self help to technical knowledge)
- Knowledge sharing and collaboration
- Proactive event communication
- Service Provider improvements
- Open Support Repository
- Improved templates and protocols
- User eXperience specialist services
- Service Provider support development
- User eXperience focus
- User eXperience focus

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**Open Support Repository**
- Improved templates and protocols
- User eXperience specialist services
- Service Provider support development

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**User eXperience focus**
- User eXperience focus
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BENEFITS

• A common approach to get support
• Coordinated and seamless support processes in place
• More trust will form between Researchers and IT staff
• Better focus for researchers
• Access and availability of additional information
Questions?

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