



WP Leader/Task Lead Institution[Naturalis/CETAF]
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MS 5 DiSSCo Helpdesk adjusted for enquiries

Laura Tilley [CETAF]

TETTRIs

Transforming European Taxonomy through Training, Research, and Innovations

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1. Introduction

1.1 Context

The report outlines the process for completing Milestone 5 (MS5) of the DiSSCo Helpdesk, tailored for handling inquiries. Verification for MS5 entails ensuring the DiSSCo helpdesk is accessible online. MS5 was executed by WP3 Task 3.3 'Taxonomic expertise marketplace,' led by CETAF. The overarching objective of Task 3.3 is to profile taxonomic expertise and establish a searchable index for diverse audiences. Additionally, T3.3 will generate a 'coaching plan' or user support guidance to assist taxonomic experts in registering and aid other user types in navigating the tool. It is envisioned that the helpdesk will assist users in utilising both the e-services and expertise components of the marketplace.

The helpdesk was previously established during the [SYNTHESYS+ EU](#) project (Tilley et al. 2021; 2022). The [DiSSCo helpdesk](#) utilises a commercial helpdesk system named [Jitbit SaaS version](#). It encompasses several features, including a ticket system, multi-lingual support, API integration, connectivity with GitHub, file sharing, user-friendly interface, storage space, automated alerts and notifications, automated workflows, email import, scalability to incorporate other services, AAI support, canned replies, reporting features, and dashboard and analysis tools. Thus far, the help desk has been piloted solely for the DiSSCo service known as the [European Loans and Visits Service \(ELViS\)](#), with a structured workflow established for this purpose. Expansion plans for the DiSSCo helpdesk involve providing support for both primary DiSSCo services and CETAF services. This encompasses the CETAF/DiSSCo registry of collections, along with tools and services derived from TETTRIs, such as the Taxonomic e-service and

expertise marketplace, and the Taxonomic Resolution Engine (TRE). Oversight and management of the helpdesk will be conducted by the CETAF General Secretariat at the primary support level. For any highly technical or scientific inquiries, a secondary tier of technical experts from the CETAF community will provide support.

2. Methodology and Results

The DiSSCo/CETAF Service Helpdesk has been adapted to incorporate the Taxonomic e-service and expertise marketplace by adding a section in the ticketing system (Figure 1) called '*CETAF Services*', and within this a category called '*Taxonomy e-services & expertise marketplace*', which allows users to specify which service they need support for.

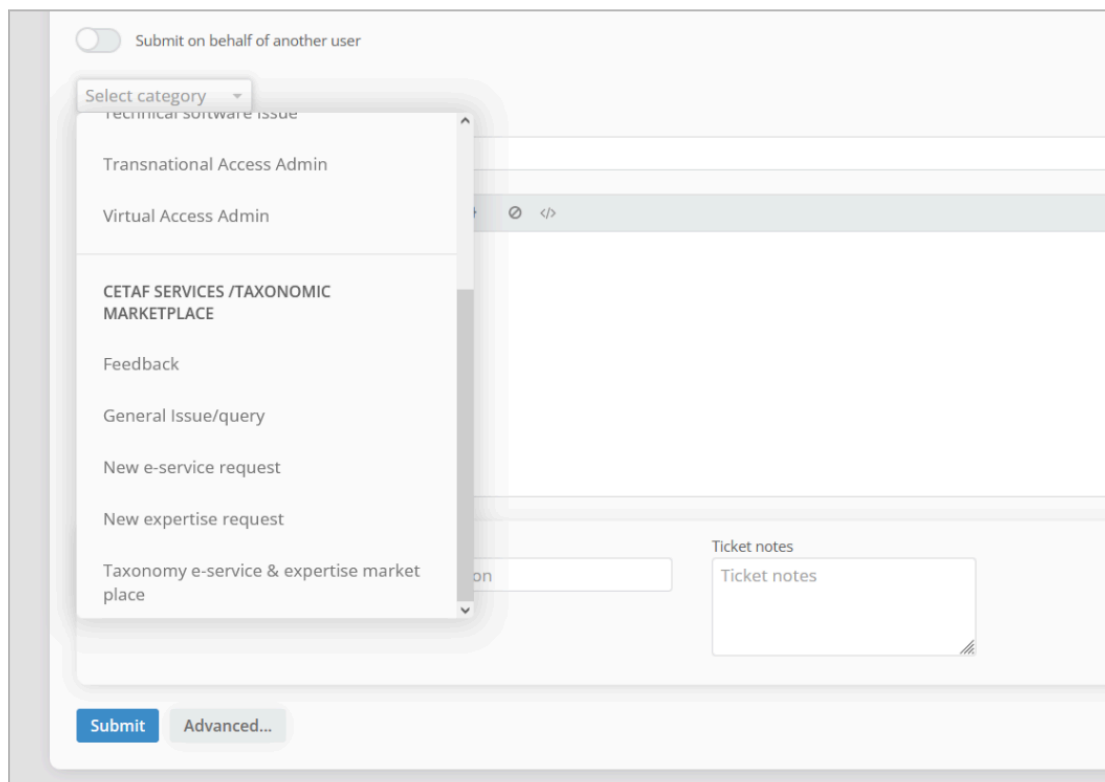
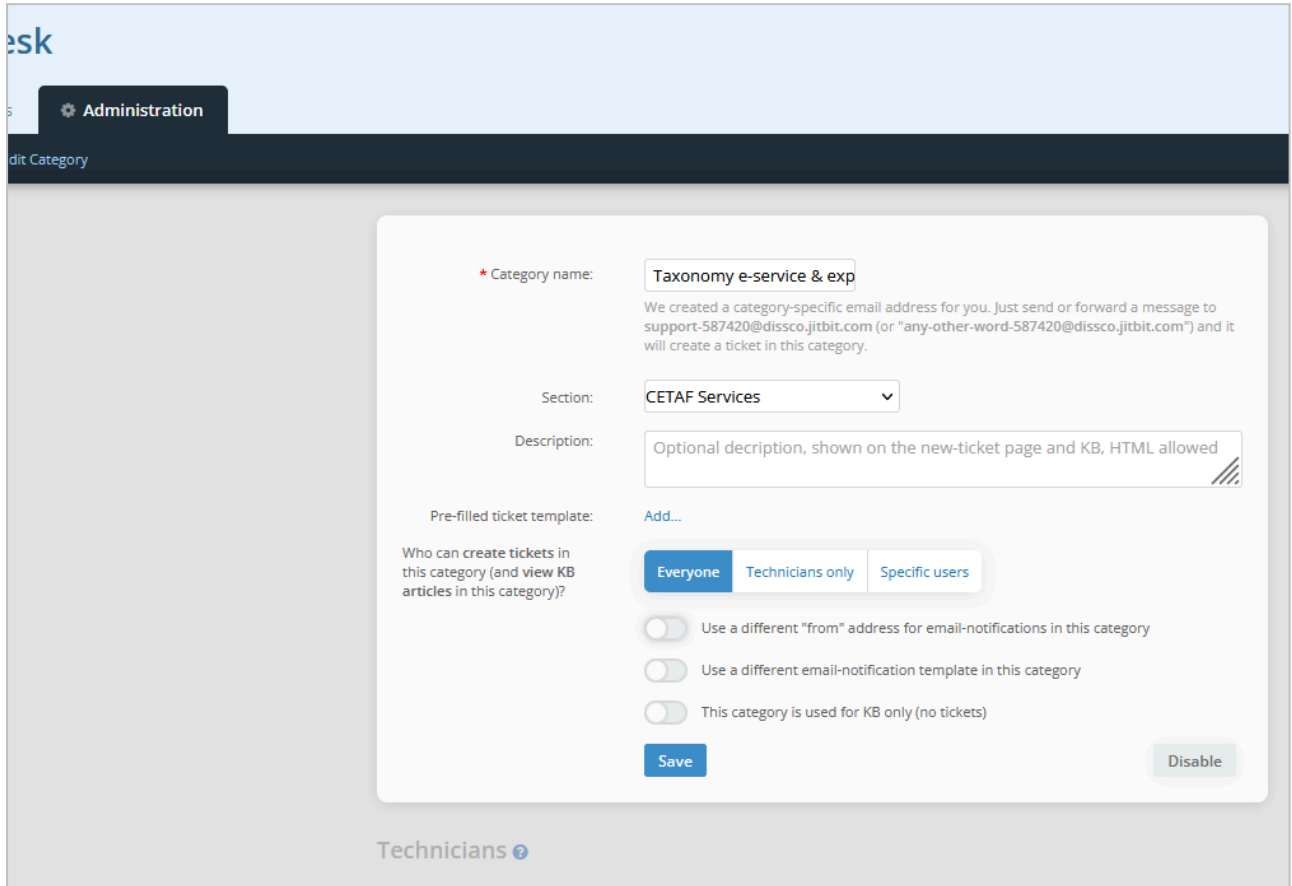


Figure 1: Showing the new categories implemented in the DiSSCo Helpdesk Ticketing System.

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For different ticket categories, the helpdesk allows administrators to specify which support technicians automatically receive the tickets, and it also allows for tailored automated emails (Figure 2).



The screenshot shows the 'Administration' section of a helpdesk interface. The main content area is titled 'Edit Category' and contains a form for configuring a ticket category. The form includes the following fields and options:

- Category name:** A text input field containing 'Taxonomy e-service & exp'. Below it, a note states: 'We created a category-specific email address for you. Just send or forward a message to support-587420@discco.jitbit.com (or "any-other-word-587420@discco.jitbit.com") and it will create a ticket in this category.'
- Section:** A dropdown menu currently set to 'CETAF Services'.
- Description:** A text area containing 'Optional decription, shown on the new-ticket page and KB, HTML allowed'.
- Pre-filled ticket template:** A button labeled 'Add...'. Below this, a question asks: 'Who can create tickets in this category (and view KB articles in this category)?'. Three radio buttons are provided: 'Everyone' (selected), 'Technicians only', and 'Specific users'.
- Notification options:** Three toggle switches are present:
 - Use a different "from" address for email-notifications in this category
 - Use a different email-notification template in this category
 - This category is used for KB only (no tickets)
- Buttons:** A blue 'Save' button and a grey 'Disable' button.

At the bottom of the form, there is a link for 'Technicians' with a plus icon.

Figure 2: Showing the options for customising different ticket categories, for example an helpdesk administrator can create a different email notification for tickets specified for certain services, and determine which technicians receive those tickets.

3. Future recommendations

- A proposal is presented here for changing the name of the helpdesk to '*DiSSCo & CETAF services helpdesk*', to highlight that it serves users that use services provided by both services.
- Create a workflow to streamline the submission of user requests, by linking to Cognito forms. This will allow for the structuring of requests and will remove the need for users to have login to the



helpdesk to submit a request. Alternatively, we can use an API to directly create a ticket from the Marketplace.

4. Next steps

- CETAF, will ask for experts from their community to volunteer to be a second level of technical and scientific support.
- To additional support user's of the helpdesk, CETAF, under T3.3, will develop a manual/guide and, frequently asked questions to help users navigate the market place and register their expertise and e-services.
- Access to the helpdesk will be made clearly implemented through the Marketplace, by either the helpdesk email or a form.

References:

Tilley L. et al. 2021 SYNTHESYS+ Milestone 27: ELVIS Helpdesk Testing ([LINK](#))

Tilley L. et al. 2022 ELVIS Helpdesk Manual ([LINK](#))