







NFDI4Earth

Deliverable D2.2.3

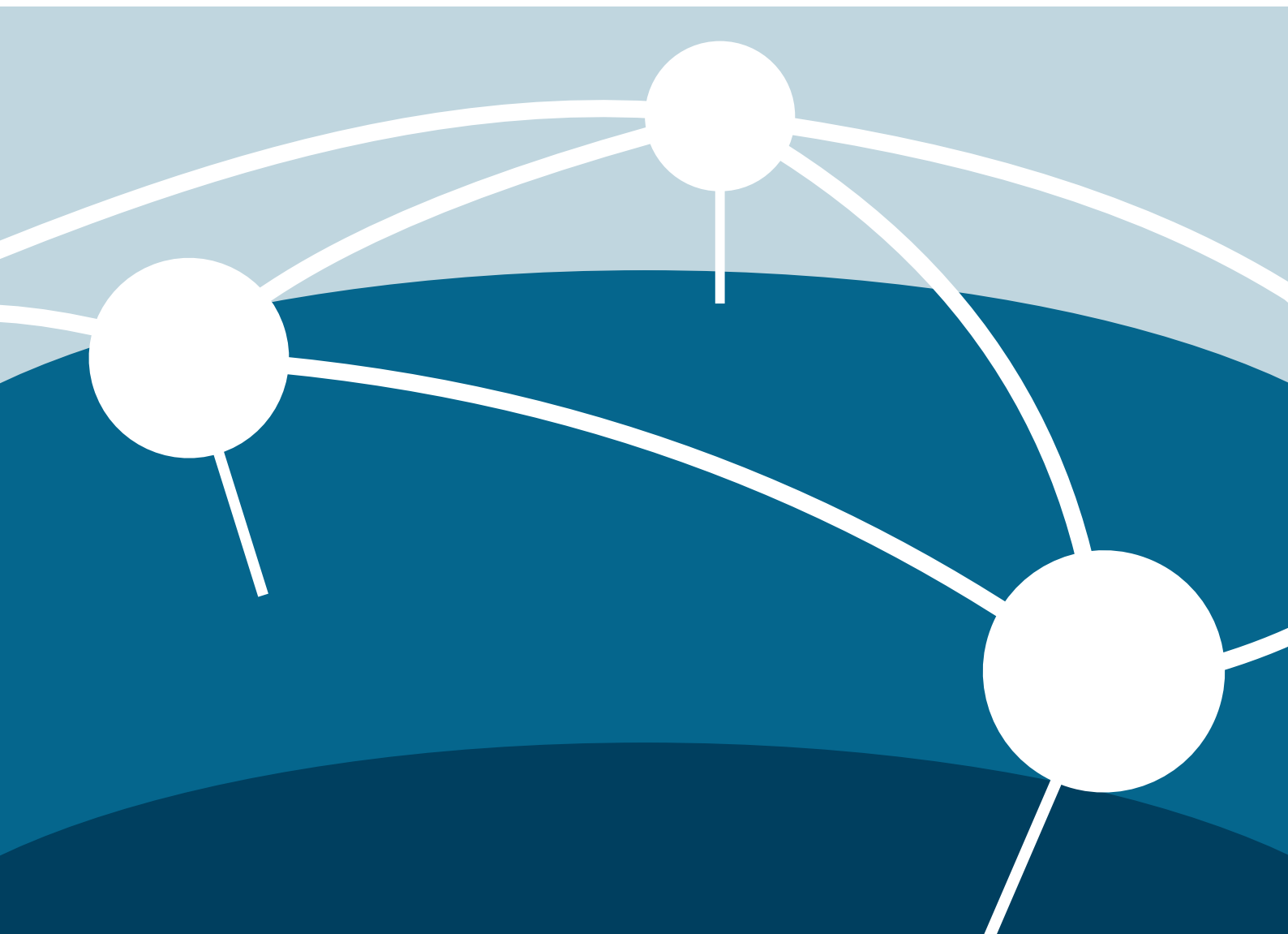
Concept for User Support Network Documentation

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2023-03 | Version: 1.0

DOI: [10.5281/zenodo.8342697](https://doi.org/10.5281/zenodo.8342697)

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Citation

Hela Mehrstens, Ines Langer, Christopher Purr, Klaus Getzlaff, Stephan Hachinger, Sören Lorenz, Ralph Müller-Pfefferkorn. 2023. *Concept for User Support Network Documentation (NFDI4Earth Deliverable D2.2.3)*. NFDI4Earth Community on Zenodo. <https://doi.org/10.5281/zenodo.8342697>

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Acknowledgement

This work has been funded by the German Research Foundation (DFG) through the project NFDI4Earth (DFG project no. 460036893, <https://www.nfdi4earth.de/>) within the German National Research Data Infrastructure (NFDI, <https://www.nfdi.de/>).

Executive summary

In this concept we describe the different documentation processes of the NFDI4Earth distributed user support network (USN) and explain the need for internal or open access to the description of different processes for support.

The USN will provide content for the NFDI4Earth Knowledge Hub, in particular for the NFDI4Earth Living Handbook, produced according to previously defined documentation standards. Additionally, user-relevant gaps in the Knowledge Hub documentation will be identified from the user questions coming up in the USN helpdesk. They will be collected and communicated to the corresponding measures.

Abbreviations

ESS - Earth System Sciences

LHB - Living Handbook

OTRS - Open Ticket Request System

RDM - Research Data Management

USN - User Support Network

OS4A – OneStop4All

EduTrain – Education and Training

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1. Introduction

The USN approach covers the diversity of NFDI4Earth by involving experts from many scientific backgrounds. Here, wide methodological knowledge and experiences around heterogeneous data sets from observation, experiment, and simulation can be found. The USN coalesces RDM support, i.e., institutional RDM help desks from many different (infrastructure) providers. Providing user support is realised as a community effort, with the ambition to provide a high-quality support network for ESS researchers and to create incentives for participating user groups to share their experience to further improve the quality of the USN support. The NFDI4Earth resources will be used for organising the distributed request flow through the network and orchestrating the USN along the actions defined below. Technically, the USN will use the Knowledge Hub and the Living Handbook as its long-term memory - adding and retrieving information relevant for this support activities. By combining the distributed RDM knowledge of experts in the USN in conjunction with the Living Handbook, M2.2 will convey the notion (knowledge) of a best practice for dealing with data and how data can be made FAIR and open while acknowledging privacy and legal limitations.

In this concept, we describe the different documentation processes and explain the need for internal or open access to the description of the processes.

2. Processes

2.1. USN design, cooperation and improvement processes

USN design and processes as well as the support expertise of the members and support categories will be documented as indicated in the Concept D2.2.1b (Initial Coverage). We expect a range of documents such as cooperation agreements, uptake agreements of new members and improvement reports. They will be collected in the internal documentation system of the NFDI4Earth (SharePoint) as there are personal data involved.

2.2. OTRS ticket system

To set up the technical support system OTRS (see [D2.2.2](#)), internal lists of OTRS agents and their accounts are collected in the internal documentation system of the NFDI4Earth (SharePoint). A range of manuals how to set up VPN, how to login in to OTRS and how to set up notifications are also available only internally. We evaluate to use a part of the GitLab repository of the LHB for this kind of documentation.

2.2.1. Request solutions

When the user support ticket system will be connected to the OS4A and user request are successfully answered, also request solutions will be documented. As a working version, the solutions are attached to the ticket and can be used inside the OTRS as request documentation.

Essential information from the processing of past tickets (e.g., standard answers to certain problems, or in general anonymised answers to all tickets as far as useful) shall be kept for further usage by agents in answering new tickets. To this end, an incentive to record this information has to be triggered, and the necessary standards for documenting successful answers have to be defined. The standards pertain to how past tickets or standard answers are kept in OTRS (or elsewhere). They have to respect general data protection regulation and principles such as the right to be forgotten and *effective* anonymisation, for which just name removal may not be enough.

2.2.2. Framework for content production

To make general solutions available in the NFDI4Earth support ecosystem for the whole NFDI4Earth community, they will be written as articles and frequently asked questions (FAQs) for the Living Handbook. These articles and FAQs will be openly available and discoverable in the OneStop4All for easy use in the community. Authors are USN members or agents with the necessary scientific background. For the practical implementation, the USN agents will have a virtual Jour Fixe to discuss incoming questions, solutions and allocate the tasks among the agents. The articles will follow the living handbook authoring guidelines and undergo the regular editorial process. A member of the USN is also part of the LHB editorial board, where the process of article generation is supervised and the editorial board will search for authors for articles about expected content (*see Appendix LHB*).

2.2.3. Open community involvement

As research data handling can be very special in different scientific communities, the USN will also find out if an open community support system (like Stack Overflow) will be of value next to the institutional RDM support of the USN team.

2.2.4. Improvement Process

The USN will develop and establish an improvement process to ensure a continuous monitoring of the support quality and the underlying processes. This improvement process will be implemented as a cycle including an annual supporter meeting and an annual report.

Improvements are based on collected statistics and monitoring of request processing as well as on the regular user surveys.

Additionally, an annual improvement workshop will define upcoming adjustments, possible re-design and further development steps for the support network.

The overall concept for the annual improvement cycle will be developed in D2.2.4 by Q1 2024.

2.3. Link to other NFDI4Earth components

The User Support Network will both use and enlarge the information provided by the NFDI4Earth components accessible via the OneStop4All, namely the Knowledge Hub, Living Handbook and EduTrain. Users who searched the KH and LHB or attended courses of the EduTrain may contact the USN at a later stage and can either be informed about new developments or content or will ask for still missing offers. This will be communicated in regular exchange meetings or a newsletter in collaboration with the planned NFDI4Earth Central Hub for networking.

A. Embedment in NFDI4Earth support structures

The description of the support structures is taken from the concept D2.2.1b.

A.1. OneStop4All

The user of NFDI4earth is expected to visit the OneStop4All (OS4A) to access the information, services and material which builds the national research data infrastructure for earth system science. In the portal, the user is expected to be guided to the 'right place' and find the answers for their demands. Only a part of the users is expected to require individual consulting. These are then forwarded to the 'real people' via the OTRS.

A.2. Knowledge Hub

The NFDI4Earth Knowledge Hub (KH) as part of the OneStop4All provides automatically collected information, services and material for the national research data infrastructure for earth system science. Therefore, the KH is the backbone of available information and documentation. USN partners are feeding in content from their practical involvement in research data management infrastructures, e.g. via re3data.org.

A.3. Living handbook

The NFDI4Earth Living Handbook (LHB) will be used by the USN as its long-term memory - adding and retrieving information to make the user support a community effort with constant quality improvement. The USN will send a representative to the editorial board of the LHB, to be part of the content development and selection, according to the needs and experiences gained from the direct contact to the user. For 2023 the USN group named a member of the board. This decision needs to be renewed every year, and will be part of the annual workshop agenda, where also new partners are expected to be present and can be included.

A.4. OTRS

The ticketing system, technically provided by the TA4, will be customised by the USN. The OTRS concept (D2.2.2) defines the response time, queues and agent roles and their internal communication to provide a well-defined support in the, above mentioned, support categories. This direct contact of the USN agents to the users will give insight into the needs of the user and will be used to improve the information given in the OneStop4All portal the Living Handbook.