

Don't Throw the Baby out with the Bathwater

Recreating a Valuable Feature of a Legacy System in a New Ticketing System

» Abstract

In 2021, the USMAI library consortium replaced three disparate channels for receiving service requests with a single USMAI Service Desk, using Atlassian's *Jira Service Management (JSM) - Server* software. One of the ticketing systems being replaced was the homegrown and aged *AlephRx*, which lacked some useful features typical of a modern ticketing system. However, *AlephRx* had one not-so-typical feature beloved by staff at USMAI libraries: all service requests, submitted by anyone, were visible to all logged-in users, creating a de facto knowledge base. This poster describes how systems librarians configured *Jira Service Management - Server* to preserve this functionality so valuable to our customers.

» Shared Login: AlephRx – Flaw or Feature?

- The ability to view all other users' service requests was a result of the fact that the *AlephRx* database had one username and password shared by all end users.
- Shared logins are a bad security practice.
 - New users didn't know how to obtain the username and password, which was necessary to reply to a service request.
 - There was no option *not* to share with everyone when inappropriate.

» The Customers Have Spoken – It's a Feature!

During user acceptance testing for USMAI's implementation of *JSM*, every test subject mentioned their desire to see requests other than their own.

There is real utility in being able to search other people's tickets.

I want to see requests by everyone.

Regularly search [Aleph]Rx, to look for something that's already been submitted.

For what it's worth, I have on a number of occasions been able to track down how something horrible happened in the past.

I can see mine. Will I be able to see others? Because I sometimes get inspiration from that.

It's such a massive database of the right way to phrase things.

» Individual Logins: Jira Service Management - Server

- Like most ticketing systems, *JSM* has individual accounts for each user, tied to an email address, which enables improvements in the user experience.
- Users can create new accounts and control their own passwords for access.
 - Users can reply to notification emails and have their replies recorded in the service request.
- Like *AlephRx*, *JSM* has a web interface where customers can browse existing service requests. Unlike *AlephRx*, *JSM* allows customers to view only service requests created by them and those shared with them by others.

How, then, to make sharing with everyone the default?

» Configuration: Jira Service Management - Server

Make sharing with an organization the default:
[Administration > Applications > Jira Service Management > Configuration](#)

If a reporter belongs to only one organization, should requests be shared with it by default?

☒ Yes, new requests should be shared with the whole organization

☐ No, new requests should be private

Create one, and only one, organization, called USMAI Library Staff:
[Project Settings > Customers > Add Organizations](#)

Customers Add organizations

Anyone can raise a request in this service project. [Change permissions.](#)

Search customers and organizations

Add all customers to the organization. Use Confluence Bulk User Actions to export CSV file of users from USMAI Member Portal. Paste usernames into box in *JSM*:
[Project Settings > Customers > USMAI Library Staff > Add customers](#)

Customers USMAI Library Staff Add customers

Search members by name or email

Name

Add customers to USMAI Library Staff

Enter usernames or email addresses

Avoid emailing the 300+ members of the organization with each new request by disabling the customer notification when an organization is added to a request:
[Project Settings > Customer notifications > Organization added > Edit](#)

Organization added

DISABLED

When a request is shared to an organization, your service project notifies the organization's members so they can opt-in to further updates.

» Customer Interface: Jira Service Management - Server

When creating requests, customers can opt out of sharing with the organization by choosing Private request. Service Desk agents can also remove the organization from the request if they deem it inappropriate to share (e.g. PII is included).

Share with USMAI Library Staff

Create Cancel

Share with USMAI Library Staff

Private request

Share with USMAI Library Staff

When viewing existing requests, customers can limit to their own requests, those shared with them as individuals, and those shared with their organization.

USMAI Service Desk Requests

Any status Created by anyone Any request type

Type	Reference	Summary
	GSD-1393	Inventory Shelf List
	GSD-1365	Error when trying to

Created by anyone

Created by me

Where I am a participant

SHARED WITH MY ORGANIZATIONS

USMAI Library Staff

Would be really helpful if we could see it by school.

» Problem Solver: Automation for Jira - Server Lite

There were still two desired features that could not be achieved using *JSM - Server* alone, so we installed a free plug-in that offers more robust automation features.

1. Allow customers to limit to requests submitted on behalf of their own library.
 - Adding customers to a second organization would make that possible but would prevent the requests from being shared by default; it would also add overhead to the manual process of adding each new user to an organization.
 - The custom field, Member Library, is not searchable via the customer interface; only the Summary field is searchable.
 - *JSM*'s native automation feature does not allow the Member Library value to be appended to the existing Summary field to facilitate searching by Member Library code, but *Automation for Jira - Server Lite* does:

Global rule: [Administration > System > Automation for Jira > Automation Rules](#)

Add Member Library to Summary **ENABLED** Edit issue

Set values for fields on the issue. Simply add the fields you want to edit.

Choose fields to set...

Summary *

{{issue.summary}} - {{issue.Member Library}}

When: Issue created

Rule is run when an issue is created.

If: Member Library does not equal

Select member library

And: Member Library is not empty

Then: Edit issue fields

Summary

USMAI Service Desk Requests

Any status Created by anyone

Type	Reference	Summary
	GSD-1401	XPT typo cleanup - CP
	GSD-1390	EZproxy request - UB
	GSD-1163	BC Circ Events - BC
	GSD-1400	shelf list report - ES

2. Make all Password Reset Requests private, since they are not useful to share.
 - The workaround was to use *JSM*'s Bulk Change tool periodically to clear the Organizations field in service requests with that Customer Request Type.
 - The Organizations field is not editable via *JSM*'s native automation feature, but it is editable with *Automation for Jira - Server Lite*:

Project rule: [Project Settings > Project Automation](#)

Clear Organization from Password Reset Request **ENABLED** Edit issue

Set values for fields on the issue. Simply add the fields you want to edit.

Choose fields to set...

Organizations

This field will be cleared

When: Issue created

Rule is run when an issue is created.

If: Customer Request Type equals

Aleph Password Reset Request

Then: Edit issue fields

Organizations

Cancel Save