**User Support Consultation Checklist v1 for**:

eResearch application or service name

*Complete this form to assist you with qualifying for the AeRO Tick.* [***http://usersupport.aero.edu.au***](http://usersupport.aero.edu.au)

|  |  |
| --- | --- |
| **Document date** |  |
| **Document author** |  |
| **Primary contact** |  |
| **Primary organisation** |  |
| **Product role** |  |
| **Categories** |  |
| **Target support groups** |  |
| **Licensing** |  |

# 

# Support provision

|  |  |
| --- | --- |
| **Training provision** |  |
| **Service desk** |  |

# 

# eResearch application or service

|  |  |
| --- | --- |
| **Overview/Description of service** |  |
| **Do you grant us permission to display your logo on the AeRO website?** |  |

# 

Documentation maturity

This section is a quick self-assessment and at a glance shows where there is room for improvement. This rating may be published in Research Adviser.

## General rating

|  |  |  |
| --- | --- | --- |
| **Rating:** | *(enter number 1,2,3, according to Criteria)* | Overall, how well do you think you perform?  Criteria   1. *Minimal formal documentation available* 2. *Adequate documentation for establishing the system is available* 3. *Well-established documentation for technical and non-technical users* |

## 

## User documentation and self-help guides

|  |  |  |
| --- | --- | --- |
| **Rating:** |  | Is there documentation available?  Criteria:   1. *No user documentation* 2. *Adequate documentation for a new user* 3. *Comprehensive documentation for new and experienced users* |

## 

## User Knowledge-base

|  |  |  |
| --- | --- | --- |
| **Rating:** |  | Is a knowledge base available?  Criteria   1. *No knowledgebase exists beyond user documentation* 2. *Basic FAQ or similar is available* 3. *User forum is available and actively utilised* |

## 

## Developer documentation

|  |  |  |
| --- | --- | --- |
| **Rating:** |  | How well is the development documentation managed?  Criteria   1. *No developer documentation* 2. *Adequate documentation for understanding the system and engaging in basic development tasks* 3. *Comprehensive documentation for extending system functionality* |

# User Support Considerations and Guidelines

A indicates the mandatory item to qualify to receive the AeRO Tick. The AeRO Tick is recognition for the work the Service Provider has made to enhance user support.



|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Guidelines** | **eResearch application or service availability and comments** | **Enhancement recommendations from AeRO** |
| **HIGH LEVEL** | | | |
| **Public website** http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png | *Follow the guidelines in this column* | *Enter your comments in this column* | *Leave this column blank* |
| **eResearch application or service overview** http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png | Usually available on the ‘About Us’ page, clearly explains what the service does or offers. | http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png |  |
| **SUPPORT** | | | |
| **Contact Us page** http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png | Displays at least one contact method, but preferably more.  Team/generic email addresses should be check regularly.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/displaying-contact-details/> | http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png |  |
| **Service Desk** | A Service Desk provides a single point of contact for enquiries and issues. A Service Desk is not mandatory (email can be sufficient) however for large quantities of communication, it is definitely recommended.  Online Service Desk software (cloud) is the best option for small to medium sized businesses.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/service-desk-tools/> |  |  |
| **eNewsletter / Blog / Social Media** | It is good practice to post regular updates via different channels to show users the project is still active and supported.  A number of free cloud-based eNewsletter services are available in the good practice guide.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/social-media-communications/> |  |  |
| **User guides / Tutorials / Installation Guide** | Guides / tutorials are to be accessible from within the portal/service once a user has logged in.  An Installation Guide is necessary if installation is required.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/tier-0-support-material/> |  |  |
| **Knowledge base / FAQ / User Scripts http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png** | Tier 0 or self-help material is a key step to reducing the number of enquiries a Service Provider receives.  Keep asking yourself ‘How Do I…’ to develop Knowledge Base articles.  This support material is to be accessible from within the portal/service once a user has logged in.  Once multiple queries of the same nature arrive, it is good practice to add this to the Knowledge Base / FAQ.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/tier-0-support-material/> | http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png |  |
| **Escalation protocol** | Does your service fit within the sector’s escalation protocol? It is the most common process for the triage of support queries or incidents.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/escalation-support-incidents/> |  |  |
| **Service alerts** | For planned outages, it is good practice to publish this information on the website at least 24 hours prior to the outage.  For unplanned outage, it is good practice to publish this information on a website if possible.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/service-alerts/> |  |  |
| **LOGIN** | | | |
| **Placement of Login button** | A top right-hand corner Login button is standard across most services and greatly reduces users’ confusion.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/login-authentication/> |  |  |
| **Federated authentication via AAF** | Authentication via the AAF enables the user to log in using their home institution’s username and password, avoiding the need to remember another set of credentials.  Contact AAF Support if assistance is required.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/login-authentication/> |  |  |
| **USABILITY** | | | |
| **Terminology http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png** | Terminology based on the end-user reduces confusion. The REFEDS guide sets out several terminology improvements.  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/usability-guidelines/> | http://help.sharesight.co.nz/wp-content/uploads/2007/12/confirmed-green-tick.png |  |
| **Help/information tips and text** | Inclusion of help text within the application greatly increases usability.  Usually indicated by a blue info icon http://www.informatics.jax.org/webshare/images/blue_info_icon.gif or a stand-out coloured box  View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/tier-0-support-material/> |  |  |
| **General application usage** | A second opinion is usually required for this step. What can be improved? Several suggestions to consider:   * Does middle mouse click work? * Do links open in new windows when they should? * Do the primary internet browsers all work? * Is the text too small or too big?   View the good practice guide here:  <http://usersupport.aero.edu.au/good-practices/usability-guidelines/> |  |  |
| **DEVELOPER** | | | |
| **System administration guide** | A guide to administer the system may be required. |  |  |
| **Issues/tasks register** | Application issues/bugs/features need to be recorded. |  |  |
| **Codebase** | Is code private, or open-source? A tool like Github can host open-source code. |  |  |
| **Ethics and Grant material** | Researchers may need answers to questions in Ethics and Grant application forms. See <http://www.neaf.gov.au/> for more information. |  |  |

# Once you have completed this form

Send your completed form to [enquiries@aero.edu.au](mailto:enquiries@aero.edu.au) to process your application for the AeRO Tick.

More information available at <http://usersupport.aero.edu.au>