

Project Overview:



Coho Project: Help Desk & Call Center Core Services

*An Open Source Community Development Project
for the Public Sector*

The Coho Project will develop **Help Desk & Call Center** facilities. The application, upon first release, will provide a core set of facilities that will address the common needs of the interested community of participants.

The Coho application will be developed by a community of stake-holders who have chosen to participate in an open Community Source effort. Community source group(s) will provide configurations of computer software, hardware, and communications equipment all or part of which are owned by the common community and freely available to community members.

In addition, the Coho application is to be made available under an Open Licensing regime. This provides for the broadest possible installation base for the application that, in turn, insures that the overall application life cycle of the Coho application is maximized throughout the community of interest.

What is a Help Desk?

A help desk application provides capabilities for groups and enterprises to maintain on-going services to an identifiable group of users within their respective communities of interest. Help desk services generally provide solutions that optimize service delivery across multiple channels, including phone, Web, and email, to improve service and reduce costs. Facilities for:

• Customer Support	• Quality Management
• Citizen Response	• Service Level Agreements

These facilitate and/or include:

Integrated Problem Management that enhance issue resolution workflow and track progress, ensuring end-to-end problem resolution

Productivity Tools to help with quicker resolution of customer issues, including a built-in knowledge base, email support, and the ability to search and view customer interaction histories

Flexible Process Modeling allowing easy augmentation of enterprise best practices into customer-facing interaction systems, ensuring consistent and complete customer service

Self-Service Functionality to provide customers with the ability to search a knowledge base, submit, update, or check issues, and benefit from easily



accessible 24x7 support, improving customer satisfaction and reducing calls/transfers into the call center

Entitlement and Contract Management that quickly validates which customers are authorized for service and the response times that service **MUST** be delivered to meet expectations

Help desk services may be project inward in an enterprise, as exemplified by a University faculty technical support system; or externally, as exemplified by a metropolitan transportation information system. Both internal and external service projections rely upon a core set of common facilities and configurations.

Alternatives

Currently there are a number of commercial and open source applications in this space.

Remedy (www.remedy.com), Peregrine (www.peregrine.com), and Hornbill (www.hornbill.com) all provide commercial help desk software in use by various colleges and universities, agencies and private companies.

Open source products include Best Practical Solutions' Request Tracker (www.bestpractical.com/rt/), Sugar CRM (www.sugarforge.org), and Asterisk (www.asterisk.org)

While most of these products are not directly similar applications, there are overlaps in technology between these applications and the proposed functionality of the Coho application.

What is a Community Source Project?

Community Source development is a type of Open Source systems development that involves the organizations which use the resulting system(s) within their own operations. By engaging the consumers of a technology in the process of development of that technology, the community creates a strong Collaborative Return on Investment (CROI) model. The approach also helps mitigate some of the common concerns that public agencies, companies, and non-profits have about developing large scale Open Source projects targeted for deployment as critical IT components.

The Coho community goes beyond normal ad hoc open source efforts by welcoming traditional technology vendors and their proven development methodologies into the Open Community. The resulting union of stake-holders is capable of producing industrial strength systems with predictable risk factors under a shared, open model of collaboration.

Community source relies heavily on traditional Open Source methodologies but also extends the Open Source model to include other aspects. According to the [Sakai project](#), Community Source “relies more on defined roles, responsibilities, and funded commitments by community members, than some open source development models.”



In other words, partner institutions contribute direct resources to a project with clear roles, funding commitments, accountability standards, and development models. This allows large collaborative projects to gain the value associated with collaborative development models, while ensuring that the project and product are well-managed, have strong support, and directly speaks to the needs of the end-users.

Coho Governance Structure

Governance in Community Source Models requires a number of different independent structures be implemented to ensure a few key issues are dealt with:

- Process
- Commitment
- Accountability
- Product and Project Management

The governance model for this project is under discussion at this writing. A project governance structure, using current best practices within current reference models such as the Sakai Project, will create important independent group that is responsible for all aspects of the product management and lifecycle:

- Project planning
- Financial and resource planning
- Contracting
- Support
- Software development
- Business rules development
- Member coordination
- Business development

Generally, the life of a Community Source project passes through two distinct phases. These are characterized by the pre and post release of version 1.0 of the related application.

Prior to version 1.0, the focus of the community is on the selection of technical framework of the application and the articulation of the core requirements of functionality and services that are to be provided. This is followed (often with cyclical concurrency) with the development of technology within the targeted framework which meets the requirements of the participating stake-holders.

The inclusion of industry members within the community allows these early life-cycle efforts to benefit from the approaches to product definition and development. These processes, evolved to merge with the open source development approach(es), lead to reduced risk and more robust, certifiable system implementations.

Following the release/deployment of version 1.0 of the system, the open source licensing and distribution characteristics come into effect. These lead to a more broadly deployed application base, encouraging broad market segment integration and standardization of



the community source developed system. This allows for a more broadly targeted installed base, with more community level involvement in the on-going life cycle development and support of the application.

Services provided by the system then continue to mature and expand through continued and spreading stake-holder involvement. Standardization at this (expanding) core level leads then to the ability to articulate system interoperability standards which, in turn, project the Coho facilities more broadly as a core set of services within a broader/deeper enterprise stack.

Coho Project Background

The first generation OSU Helpdesk Project (Coho) was launched in January 2003 by Oregon State University's Information Services, Technology Support Services unit. The project was a response to common needs of various internal departments, all either pursuing acquisition of commercial helpdesk software or considering development of their own systems. The goal of the project was to create a modular, web-based, open source helpdesk system that would meet a variety of users' needs. That goal was met and an open source Coho application is in production today at numerous sites. A briefing of that current generation application accompanies this overview.