SSIT Inbox Scalable Solution

# Background

## Challenge

As a design team I need to explore potential tools and process improvements to better adapt the inbox to a scalable service.

## Purpose of Assessment

Recommend desired scalable solutions to implement on behalf of the shared secure sign-in transition inbox to better support the initiative throughout the length of the transition and afterwards as needed.

## Goals of Solution

* Ability to scale the inbox to intake more volume while improving efficiency
* Easily track and escalate issues with their related data surfaced through the inbox
* Ability to extract inbox data to inform reporting and change management activities
* Provide needed resources and support to VA Staff

# Recommendation

After listing our inbox requirements and desires we reviewed 9 potential tools for adoption. It was determined that **standing up a Jira Help Desk instance** would allow the team to better manage, track, and report out on issues and requests surfaced through the shared inbox.

The tool would be easy to set up and adapt to while enabling reports and analytics in app. Although some cost may be involved as scaled it is a heavily utilized VA tool that also offers case management capabilities while handling many respondents.

## Timeline

### Quick Wins for the Near Term

* Improve data maturity
  + Ability to review & filter data
  + Compatibility for consistent data visualization
  + Ability to aggregate data from varying sources to inform further analysis
  + Identify frequency to inform targeted response efforts
* Define data codes for consistent application
* Incorporate pivot tables for data visualizations

### Future Considerations

* Prioritize automation where possible
  + AI governance and access may be too far out to adopt for application
* Establish a Jira Help Desk instance for adoption
  + Easily adopted by VA teams for future maintenance
  + Quick setup/transition time
  + Approved for VA usage
  + Automate intake, data capture, and improve tracking
  + Enable case management and reporting

### Phase 1: Immediate Improvements

Nov-Dec 2024

* Implement basic ticketing system (in progress through excel)
* Standardize data collection (in progress through excel)
* Establish basic reporting (in progress through Excel, Power BI + PowerPoint)

### Phase 2: Enhanced Functionality

Jan-March 2025

* Implement Jira Help Desk instance and setup
* Develop advanced analytics
* Create resource center

### Phase 3: Optimization and Scalability

April-Sept. 2025

* Refine processes
* Optimize Jira Help Desk and Outlook
* Develop comprehensive training and documentation

# Assessment Approach

The SSIT team conducted a few group activities to make an informed decision on the best path forward for this service. This approach started by listing requirements and desired elements via a MoSCoW analysis and resulted in the competitive audit of potential tools to consider.

## MoSCoW Analysis

### Must-Have

* + Meets VA security requirements
  + Free or low-cost
  + Tick management w/ unique IDs
  + Able to push to escalation channels
  + Accessible to all VA staff

Should-Have

* + Internal knowledgebase
  + Efficient way to get transitioned from the inbox to the new tool
  + Chat between multiple parties involved
  + Adding people to have access permissions is easy
  + Easy testing
  + SLA tracking (72 hours)
  + Organize by request type

### Could-Have

* Time tracking capability
* Warnings towards SLA
* Automation for analysis, sentiment & theming
* Address book

### Will-Not-Have

* Data mixed up with other VA systems

## Competitive Analysis

The team reviewed 9 potential tools that were VA approved or already utilized by the VA to explore for this purpose.

Jira Help Desk

The tool would be easy to set up and adapt to while enabling reports and analytics in app. Although some cost may be involved as scaled it is a heavily utilized VA tool that also offers case management capabilities while handling many respondents.

### Microsoft Planner

Although the tool integrates with Microsoft Power Automate allowing it to easily connect to the inbox it does not allow respondence and would require continuing to work in Outlook while manually moving tickets through statuses with limited statuses enabled.

### AI Assistance

With many tools starting to incorporate AI into their offerings, we explored AI capability to improve efficiency by recommending response templates, auto-tagging and auto-grouping to enable qualitative analysis. Although the opportunities are very robust the VA is still working on defining their AI security guidance which could potentially inhibit development and would require engineering knowledge to implement.

### Microsoft Forms

While a great way to improve the intake of data including required information and data format, Microsoft Forms has limited flexibility and does not enable a native response to senders. It’s ability to intake a heavy load of responses is questionable while the tool itself is not great for case management.

### Microsoft Dynamics

A well-known product utilized by the existing MHV help desk Microsoft Dynamics has a cost and requires configuration and customization to utilize in this capacity. It does require individual licenses for each user which may require additional approval time that would prove to lengthen the time to stand up.

### AskVA

While AskVA is an existing available tool utilized by the VA, it is mostly Veteran and VSO facing vs. VA staff specific. Being public facing the intake of types of issues may not reflect the purpose of the inbox in its original intent. After speaking with our call center contact about the tool it was identified that there is currently transition work to bring AskVA to Microsoft Portal on VA.gov meaning any updates or changes have been paused for a long time because of migration.

### Service Now

While a clean ticketing system that VA staff are already familiar with it, it seems unlikely that we could stand up our own instance. We learned that Service Now has a steep learning curve requiring expert knowledge. It would take a long time to stand up and would not be free, so it was determined that this is not a good solution for our needs here.

### Microsoft Power Apps

Power Apps is a Microsoft product that plugs nicely with excel data and additional plug-ins such as Microsoft Dataverse. It is available through the VA as a potential out of the box solution but the time investment to stand up is yet to be identified and may have a steep learning curve for users.

### Microsoft Dataverse

As an extension of Power Apps, it adds more robust capability and unique identifiers for each case. It also has a steep learning curve, and the interface would be through SharePoint or Teams. It is unclear how Dataverse integrates for contracts with potential for permissions issues becoming a blocker.

# Summary

To summarize, although many tools may be available to the VA not all tools assessed would enable both case management, response capability, and reporting enablement as well as Jira Help Desk. We would like to propose a continued effort to refining data maturity and reporting through our currently utilized tools in the near term. Targeting January through March for setting up a Jira Help Desk instance and adopting our processes to the software. After which, we would further optimize and refinement of the service for improved adoption by other VA teams when the current team rolls off the service next September.