SME Best practices

***Roles involved**: Subject Matter Expert*

SME, Subject Matter Expert, is the Expert who will teach HIRO how to automate processes they are knowledgeable on through a chat conversation where they answer questions regarding said processes.

1. Principles:

- Base your Teaching Session on a task(ticket) that you have manually resolved.
- Teach HIRO the exact Steps you used to manually resolve the problem - exceptions can be added in separate Teaching Sessions.
- Retrace the Steps that you did manually and list them clearly at the start.
- Be precise in your descriptions and do not leave room for wrong interpretations.
- Always use peer review by tagging a colleague to confirm your solution and descriptions.
- Handover the Teaching Session to the Knowledge Expert after peer review.

2. First Tab in Chat:

1. Clear and atomic Steps defined (names/titles)
2. The Steps refer to *actions* run on systems, and never data extraction from the Ticket.
3. Complete handover after thorough check of the steps described

Hint: Don't forget to type "done" when list of steps is complete!

3. "Sub-Chat" Tabs:

Note: In this section, numbered bullet points inform you about what you need to consider whereas bullet points in red color provides examples on how to replace information in the chat.

QUESTION 1: DESCRIPTION

1. Provide more details on this step.

   -Step title: Reset Password

   -Description: Reset password accessing the Valuemation System

2. If this step is a variation of multiple possible ways it can be done, then specify it clearly here.

-Step This is another way to reset user password from command line

3. If the step title is already descriptive, you can repeat it here.

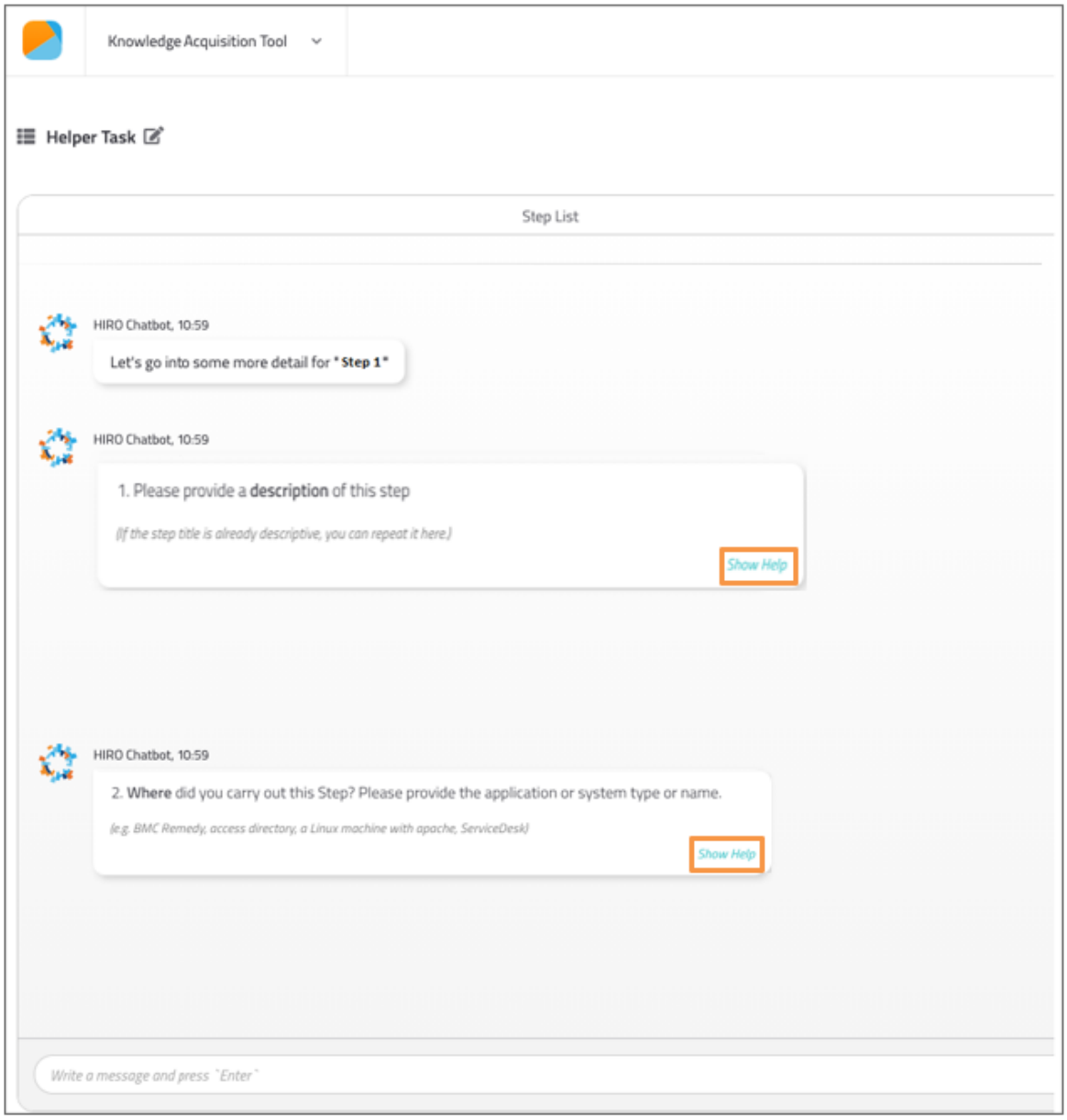


Figure 1 Knowledge Acquisition Tool (Chat Bot)

In the chat interaction, you can always access to the helper pop-ups for further description on the information you need to provide on each step.

QUESTION 2: CONTEXT

1. A clear description of ***where*** the step was carried out. E.g.

   -Which tool and which tab/part/field of that tool

   -Which server (specific name)

   -What document etc.

2. When applicable, please provide an explanation of ***why*** this was the location chosen.

   -Because all registered users are on Active Directory List

   -Because we always need to access first the agent list that is stored in Excel: 'Agent List'

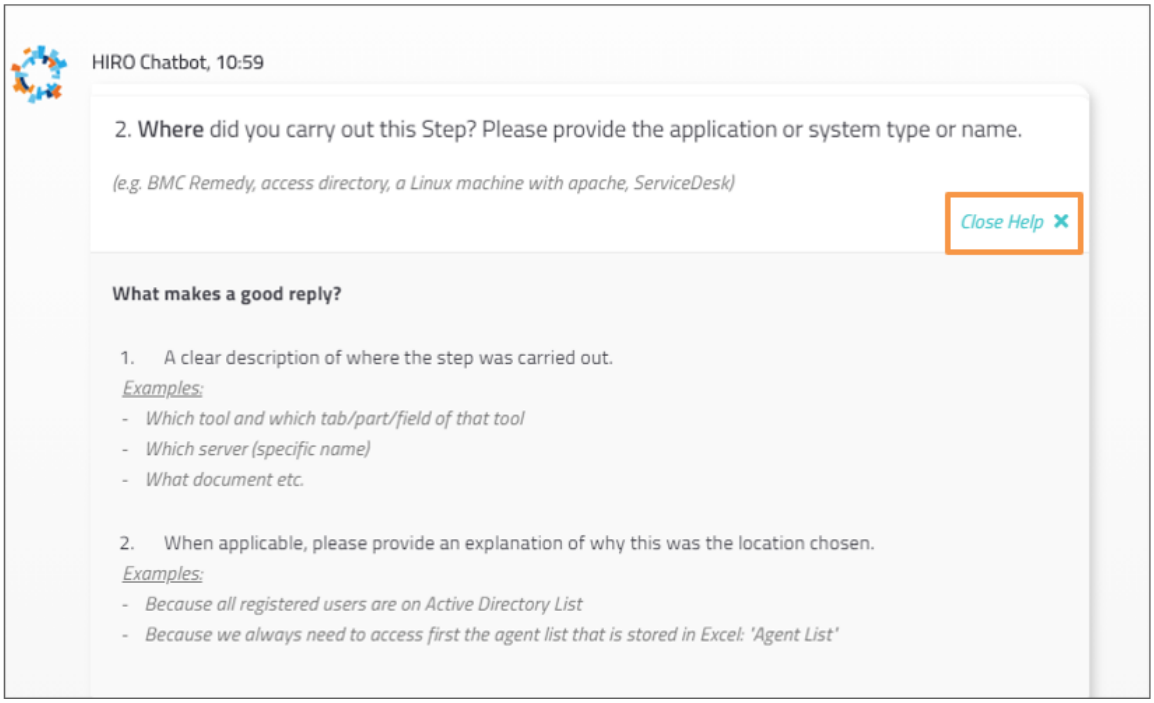


Figure 2 Helper pop-up

QUESTION 3: PRECONDITIONS

1. Refers to data on the ticket. Place "key words" in quotes. What data did you use/extract from the ticket in order to carry out this Step?

   -I need the hostname provided in the ticket; credentials to access this hostname; user must be "root".

   -Ticket title contained "password reset"; and for this step I extracted the username from the "Ticket Owner field".

2. In some cases, a step may be carried out without apparent need for information. This often happens when you overlook what you already know.

   -Create a new IN-Ticket from a CALL-Ticket. You might still need the name of the requestor, or which group you are sending the ticket to, in order to create the new ticket, however you overlook this information because you do it automatically.

3. Refers to outcomes of other steps you've already taught.

   -I previously confirmed that the user exists in the database before resetting the password for this user.

   -User permissions can only be updated if they meet a particular clearance level". To achieve this, I extracted the username from the ticket, and obtained the clearance level check from a previous step. Therefore, the essential criteria for this step include: Ticket description contained "update permissions to admin"; Username which I extracted from the Ticket Description; The user permissions were found to be "level 5" from a previous step

QUESTION 4: ACTION

Either an action you take or decision you make

1. Where you navigated to, what decision you took, what's special about the Step, what you did.

   -I searched for the username and found that it exists in the active directory. When I open Active Directory, right click on domain root, click Find, and look up username
   -Because File extension has been granted and disk space is now below the threshold, I decided to send confirmation to manager and close ticket

2. When applicable, please add what was the direct result from the action (e.g return code from a powershell command)

   -I use command "rmdir ./*" to delete files from given folder, and I get code 0 when successful
   -I checked user exists, and I take note whether he exists already or he doesn't

Hint: Don’t forget to type “done” when list is complete!

As described on the principles, when you have finished describing the process, it is best practice to ask for **peer review**. This ensures that your steps and explanations are as accurate and clear as possible for the KE.

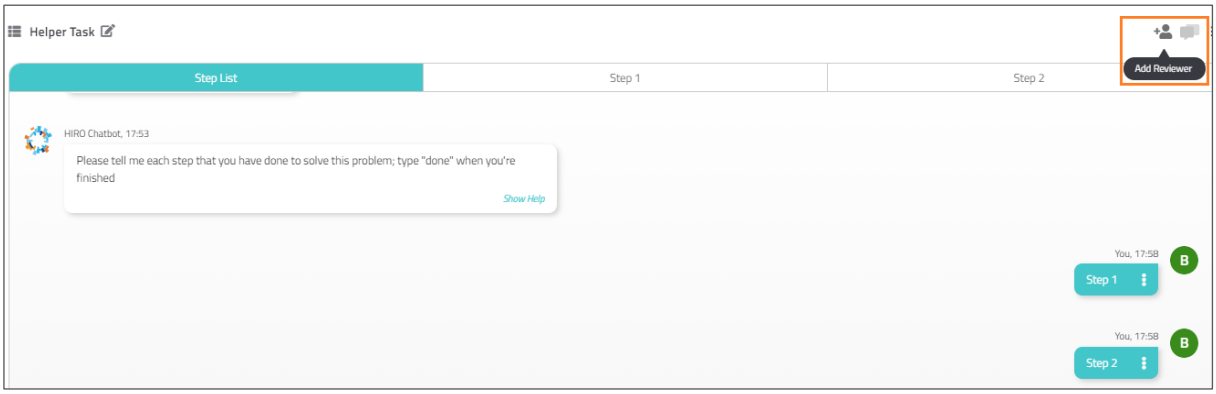


Figure 3 Peer Review Request

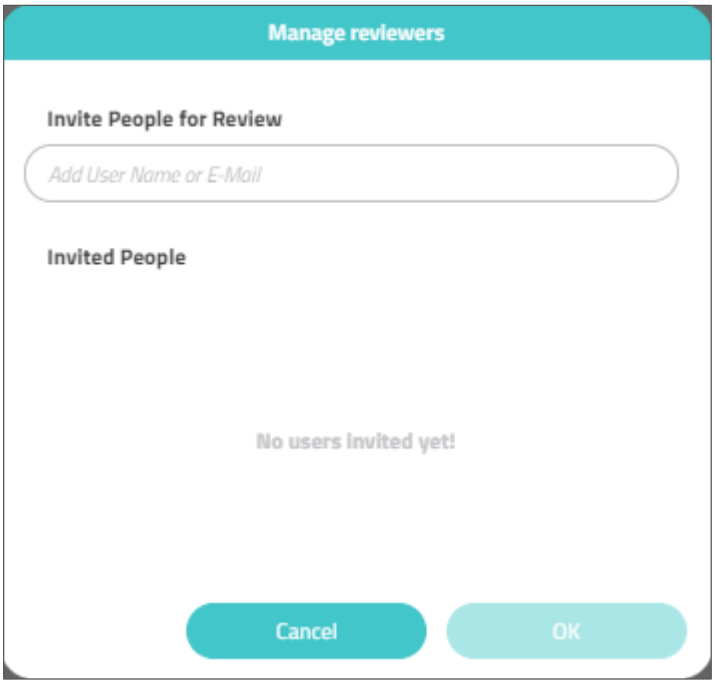


Figure 4 Look up colleagues for Review

After receiving the response from your peer, you should transfer the task to the KE to conclude your teaching session with HIRO. Simply type 'done' in the chat to complete this teaching session.

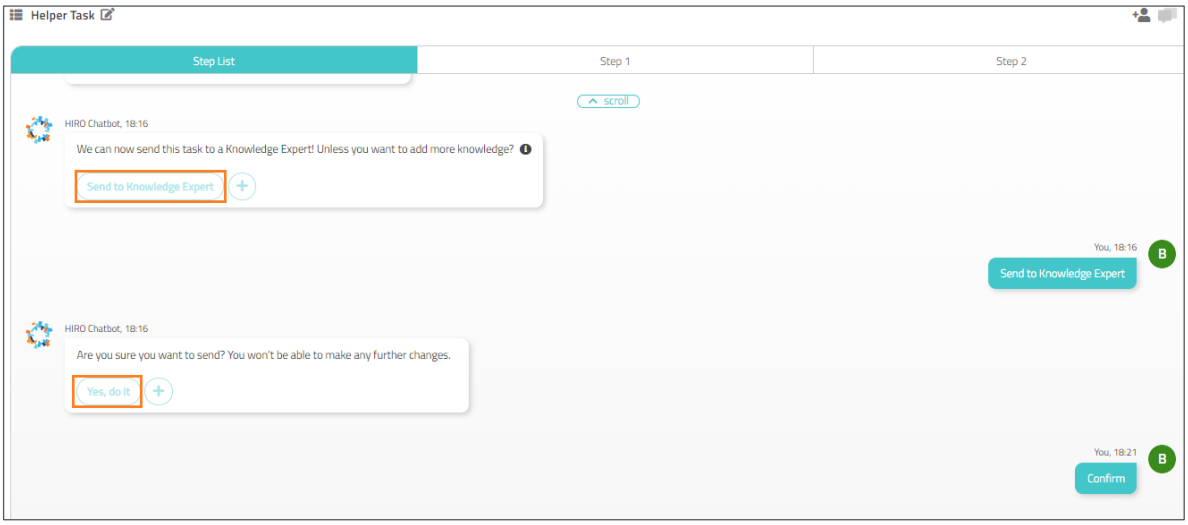


Figure 5 Hand over the Teaching Session to a KE

Following this step, you'll be prompted to double-confirm since you won't be able to add more knowledge later. Click 'Send to Knowledge Expert,' then 'Yes, do it,' and the task will be added to the KE Task List



Figure 6 End of Teaching Session for a SME

Important Note: The knowledge transfer to HIRO is not complete at this point. The SME Teaching Session should be reviewed by a peer before being handed over to the KE writer. The KE writer ensures that all steps are coded correctly for HIRO to understand.

Always keep in mind, HIRO cannot act on knowledge it has not been taught!