

Help Desk Management

(Formerly GetHelp) Version 7.1 Release Documentation

Frontline Education is happy to announce the release of Help Desk version 7.1 which includes the following enhancements:

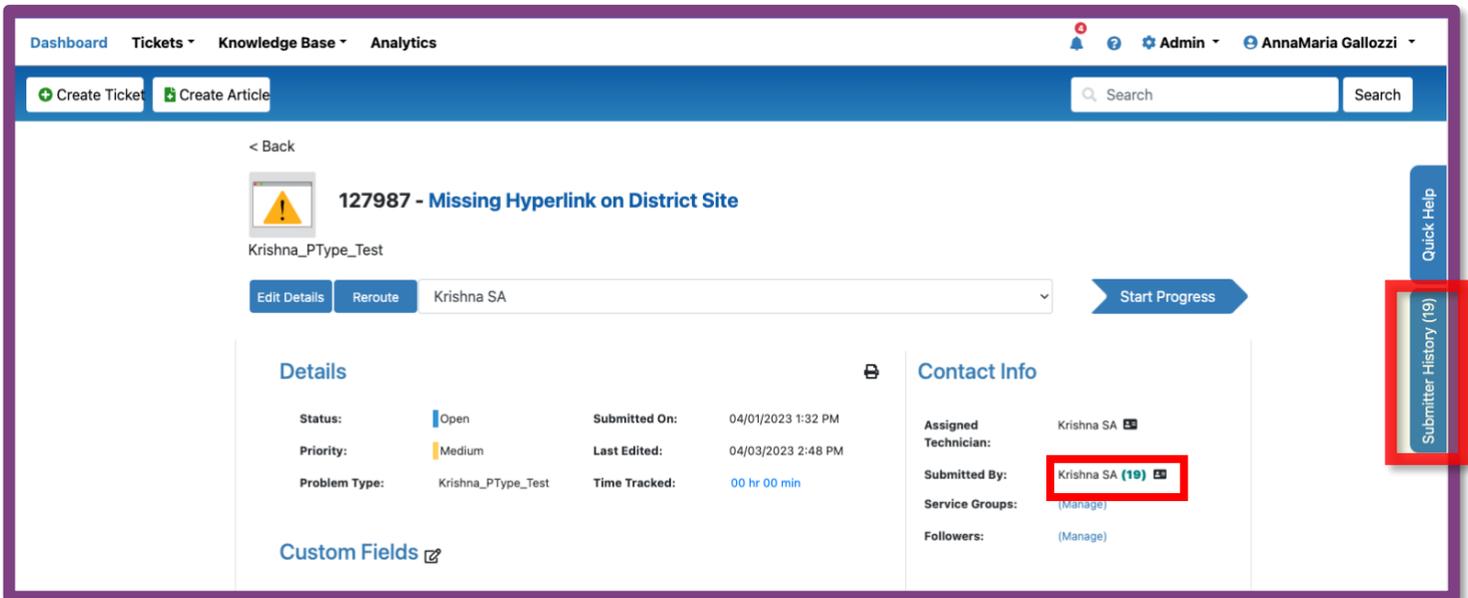
- 1) View Previous Submitter Ticket(s)
- 2) User Portal Knowledge Base

1. View Previous Submitter Ticket(s)

The new Submitter History tab on the right side of the ticket view lets the technician quickly see the quantity of previous tickets for the Submitted By user and view past ticket details without leaving your ticket page.

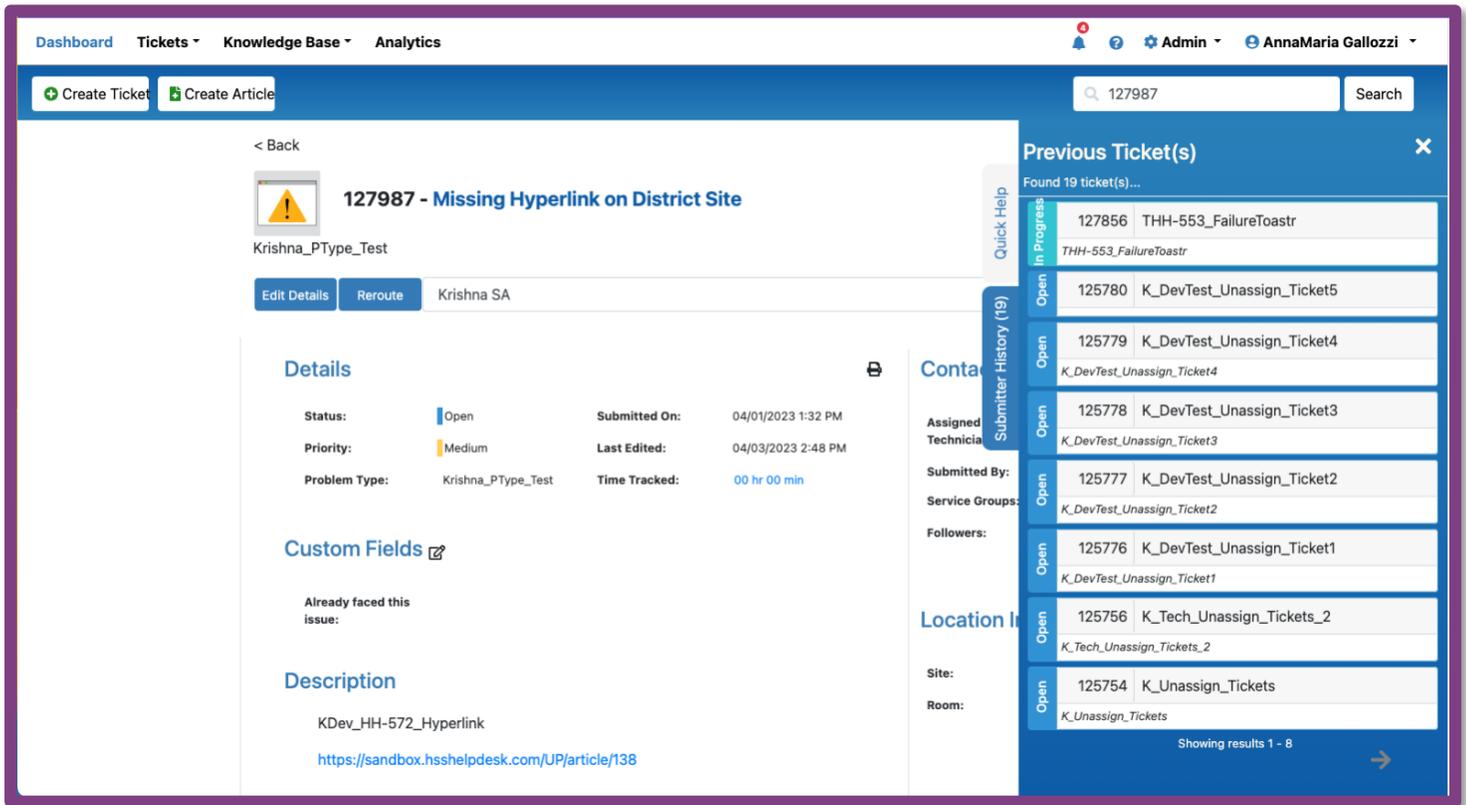
Service Desk: Submitter History Tab

- From the Service Desk view, previous tickets opened by the Submitted By user can be viewed on the right side of the ticket page on a tab called Submitter History.
- The Submitter History tab will display in parenthesis “(X)” the quantity of previous tickets for the submitter.
- If the Submitted By user has no history of previous tickets, “(0)” will display on the Submitter History tab. The Submitter History will show zero “(0)” if this is the first ticket they have submitted.



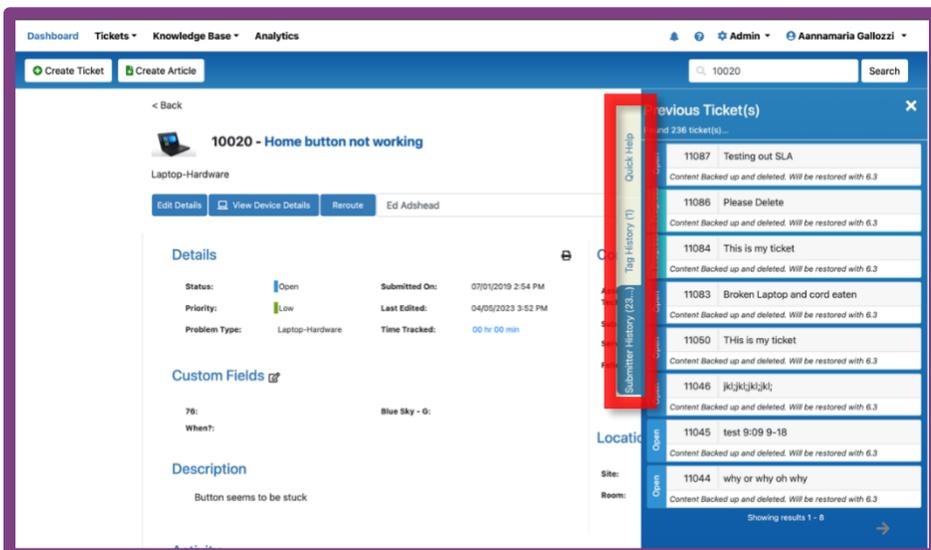
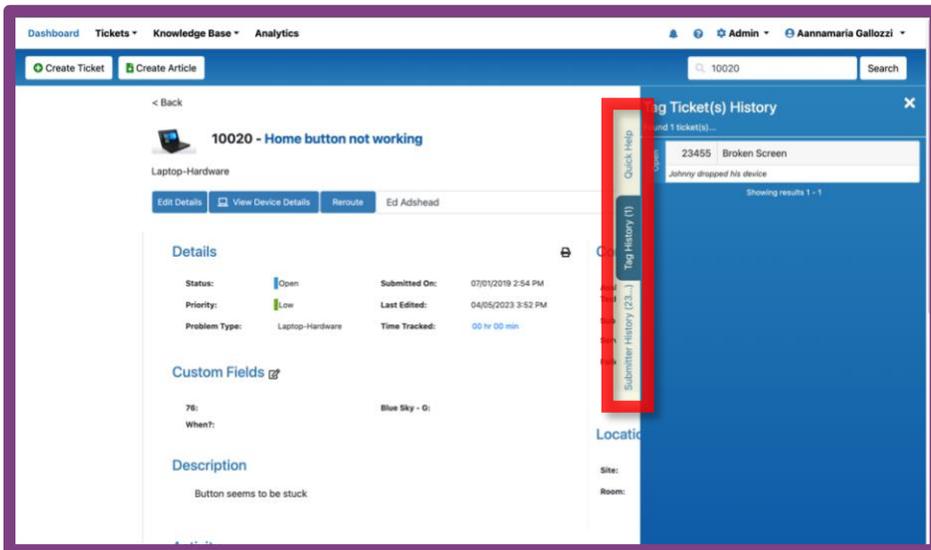
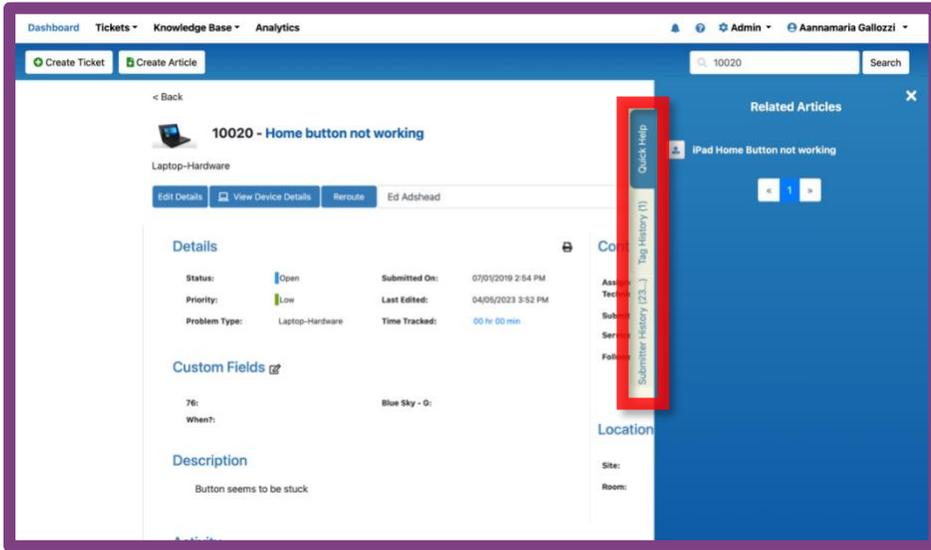
The screenshot displays the Help Desk Management interface for a ticket titled "127987 - Missing Hyperlink on District Site". The ticket is assigned to Krishna SA. The interface includes a navigation bar with "Dashboard", "Tickets", "Knowledge Base", and "Analytics". A search bar is present in the top right. The ticket details are shown in a card format with fields for Status (Open), Priority (Medium), Problem Type (Krishna_PType_Test), Submitted On (04/01/2023 1:32 PM), Last Edited (04/03/2023 2:48 PM), and Time Tracked (00 hr 00 min). The "Contact Info" section shows the Assigned Technician as Krishna SA and the Submitted By as Krishna SA (19). A vertical tab on the right side of the ticket view is labeled "Submitter History (19)" and is highlighted with a red box. The "Start Progress" button is also visible.

- Clicking the Submitter History tab will display a list of previous tickets unless the ticket has been removed, all ticket statuses will show in results.
- Tickets are shown in order of most recently submitted.
- The Submitter History tab displays up to 8 tickets in the results listing per page.
- Paging arrow icons will display at the bottom of the results listing to view older tickets or return to the start.

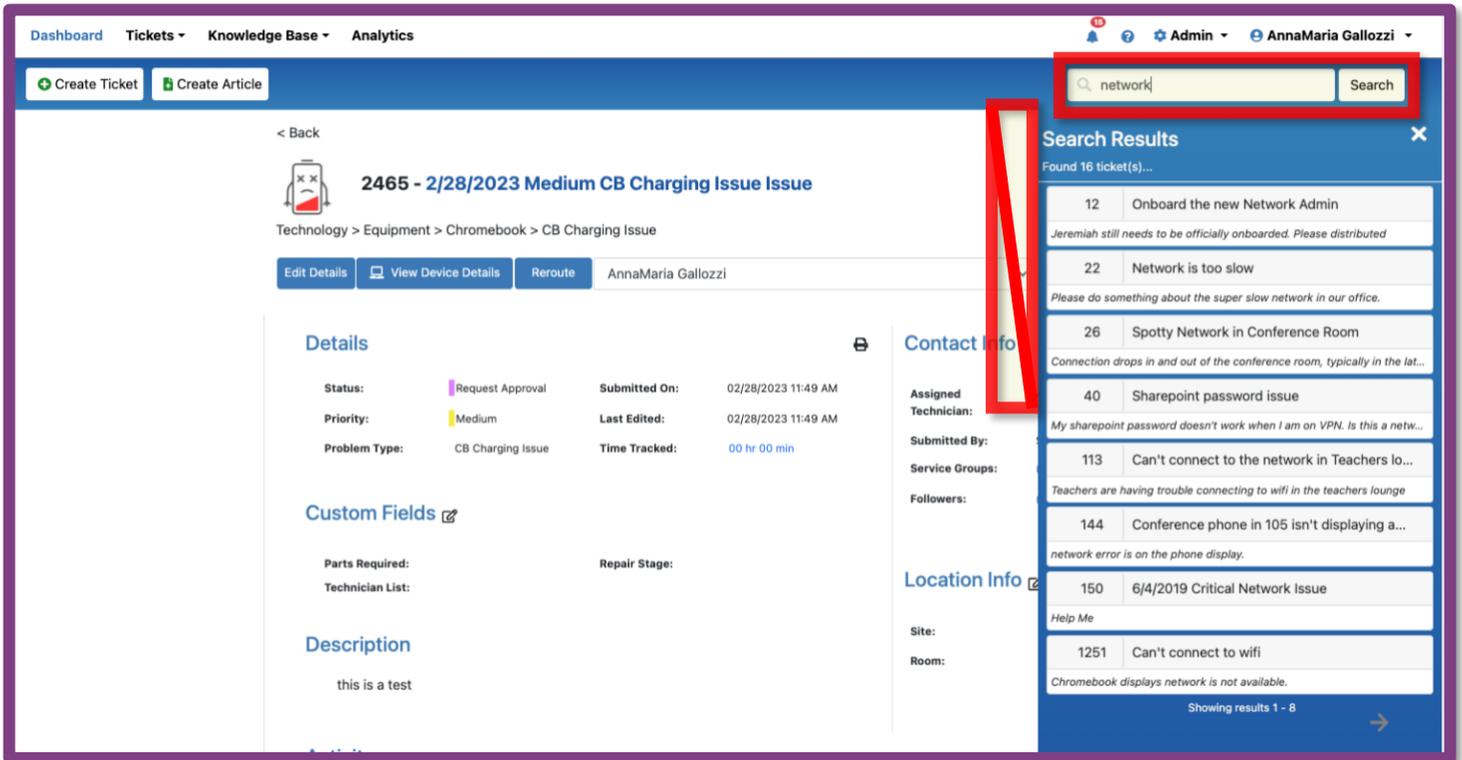


- Clicking on a ticket opens a new browser tab so the technician or admin does not lose their work on the original ticket.
- Three tabs are now possible to view from a ticket.
 - 1) Quick Help tab - If there is a knowledge base article relevant to the ticket the Quick Help Tab will be listed first.
 - 2) Tag History tab - If a tag is associated to the ticket with previous tickets the Tag History tab will be listed next.
 - 3) Submitter History tab – If the submitted by user has previous tickets the Submitter History tab will be listed at the bottom.

- When any one of the tabs is clicked to display results, the other tabs can be found on the left side for the user to toggle between tabs, as shown below.



- If a technician or admin performs a Search from the top navigation while Viewing a ticket with Submitter History, Quick Help, or Tag History tabs present, the tabs will be hidden behind the search results and not be viewable until the search results are closed.



Other Considerations:

- Depending on the computer/browser resolution of the user, the Quick Help, Ticket History and Submitter History tabs may have more or less spacing between them. We recommend using 100% resolution on your browser window, if you change your resolution, the spacing the tabs may space further apart.
- If a submitters ticket is missing from the flyout, it may mean the submitters name is not associated to the ticket as the Submitted By user.
- If the technician has a restricted user view based on site, problem type, or service group, they will not be able to view the restricted tickets in the previously submitted tickets. They will be able to see tickets they are assigned to, are following or have access to.

2. User Portal Knowledge Base

From the User Portal, your Knowledge Base Articles are now accessible to your end users (Staff, Student) directly from the top navigation on the homepage without the need to open a new ticket. From the Service Desk, Technicians and Admins can share article links to users and users can open links and/or search for articles from the User Portal on their own.

Hide Articles from the User Portal or Students

The Knowledge Base has new options for published articles. By default, the options will be unchecked leaving the article for everyone to view from the User Portal. To hide articles from the User Portal or just from Students, follow the steps below:

- Click on Create New Article or Edit an existing article (if you are an admin or your own article if you are a technician.)
- Articles support rich text editor and can handle embedded pictures or videos.
- As you are editing or creating an article, you will notice two new options are present below “Link to Tickets” called Hide this article from User Portal and Hide this article from Students.
 - **Hide this article from User Portal** - by choosing to hide this article from the User Portal, you are hiding it from ALL users who are not technicians or admins.
 - **Hide this article from Students** - by choosing to hide this article from Students, you are choosing to allow Staff Members (who has successfully added their ID to access the User Portal) to see the article. Students as well as Staff who have not updated their ID in Help Desk User Portal will not be able to view these articles.

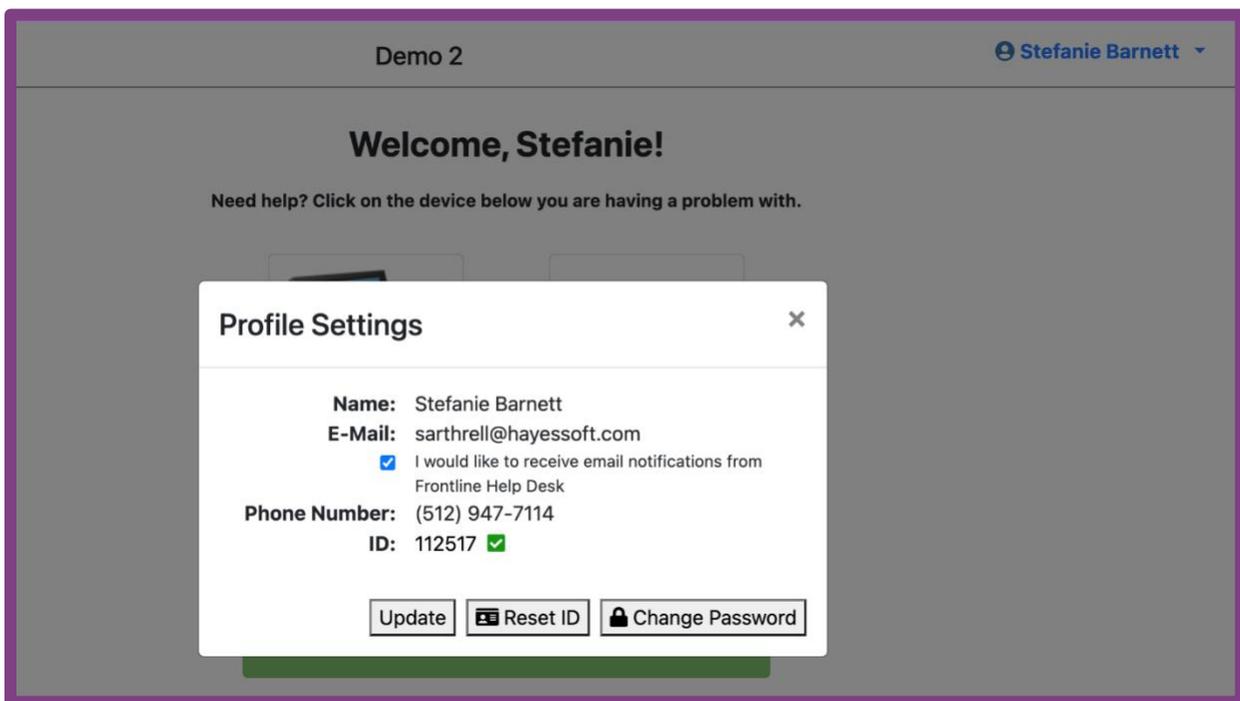
The screenshot shows the 'Create Article' form with the following fields and options:

- Article Name:** Text input field with placeholder 'Please Enter Article Name' and a character count of 0/100.
- Category:** Dropdown menu with 'Select A Category'.
- Keywords:** Text input field with 'Add Keywords To Article' and an 'Add' button.
- Link to Tickets:** Text input field with 'Search For Tickets' and an 'Add' button.
- Visibility Options:** Two checkboxes are highlighted with a red box:
 - Hide this article from User Portal
 - Hide this article from Students
- Summary:** Rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (A), Font Size (Tt), Text Background Color, Bulleted List, Numbered List, Indent, Link, Image, Video, and a minus sign.
- Action:** Dropdown menu with 'Select an action for this article'.
- Buttons:** 'Preview' (yellow), 'Create' (blue), and 'Cancel' (blue).

REMINDERS:

- Technicians can create articles and save drafts.
- Technicians can edit articles they create.
- Only Admins can publish articles.
- **Only articles in a status of “Published” can be viewed by technicians and users in the system.**
- Please verify the status of an article is not “Draft Saved” or “Pending Approval” if the article should be found by technicians or users.

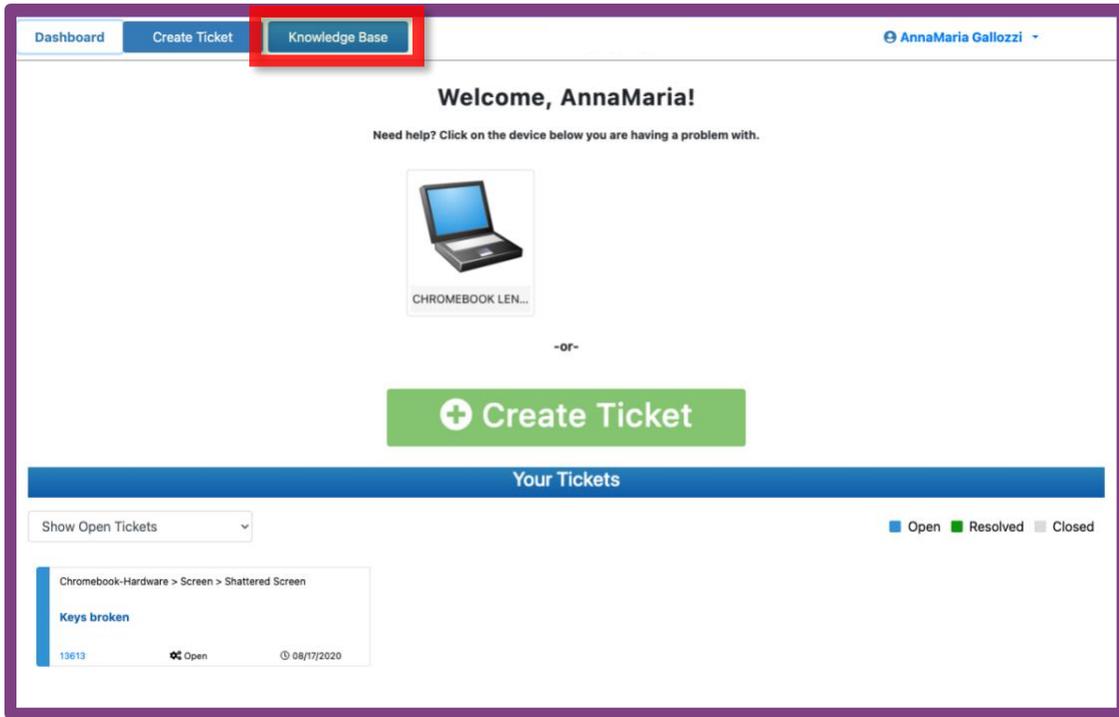
NOTE: To have a user update their ID in User Portal, have them login to the Help Desk User Portal and navigate to their profile settings from the top right corner next to their name. Click on “Reset ID”. Once the ID is set, if the user matches a profile in Asset Management (populated by the SIS or HR data imported nightly) the user will be set up to see appropriate articles.



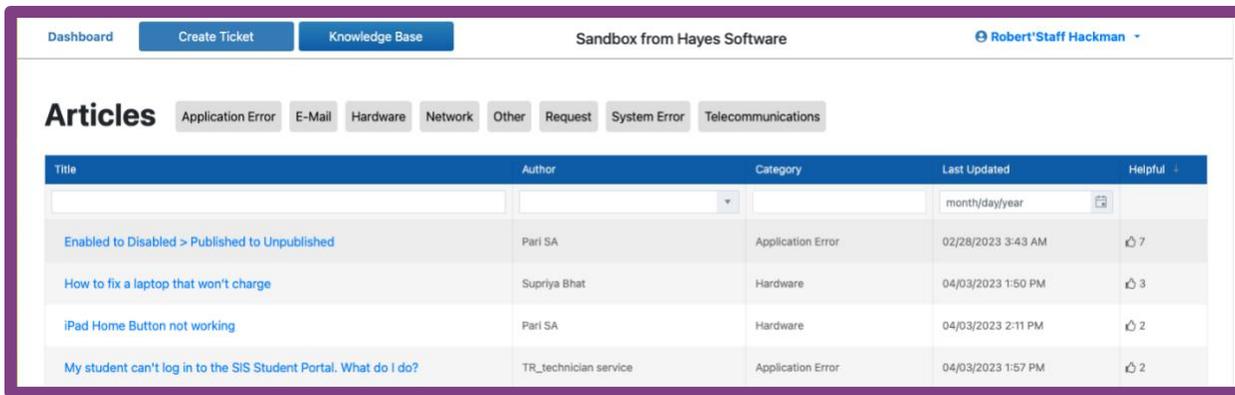
Search Knowledge Base Articles from the User Portal

The option to search the districts' knowledge base articles is available when a Staff or Student user logs into the Help Desk User Portal.

- Upon logging in to the User Portal, the “Knowledge Base” button will appear on the top navigation next to the “Create Ticket” button. If no Knowledge Base Articles are available for the end user to view, the button will be hidden and not display.



- On the “Knowledge Base” page, the Articles grid is filtered by the most helpful articles by default. Helpful Articles are decided by users viewing articles when they click the “This Was Helpful” button.



- The article grid has searchable and filterable columns:
 - A. Title (Search and Sort) – knowledge base article title
 - B. Author (Search and Sort) – original creator of the article
 - C. Category (Search, Single or Multi-Select) – default category assigned to article
 - D. Last Updated (Sort only) – last time the article was published, this could be when the article was created or if edit were saved.
 - E. Helpful (Sort only) – number of times users clicked the “This Was Helpful” button on an article

- On the top of the Knowledge Base Articles grid are quick Category buttons to help users filter the grid. Multiple Category buttons can be selected at one time. The Category options listed at the top are hardcoded and are the categories an Admin or Technician choose when creating an article. The options are: Application Error, E-Mail, Hardware, Network, Other, Request, System Error, Telecommunications.

Articles Application Error E-Mail **Hardware** Network Other Request System Error Telecommunications

Title	Author	Category	Last Updated	Helpful
How to fix a laptop that won't charge	Supriya Bhat	Hardware	04/03/2023 1:50 PM	3
iPad Home Button not working	Pari SA	Hardware	04/03/2023 2:11 PM	2

Open Knowledge Base Articles from the User Portal

- To open a Knowledge Base Article from the grid, click on the title hyperlink.
- The title hyperlink will open a new browser tab to display the article.
- The article page has different options for the user to select:
 - A. Back** - the back button opens the Knowledge Base Article grid with their search results persisted. If no search criteria was entered on the article grid, the back button will display articles sorted by most helpful (default sort order).
 - B. Share Button** – this icon  will open a share tray with multiple options for the end user to utilize. See below for further details.
 - C. Related Articles** - the Related Articles button will display articles on the grid with the same category as the article they are viewing.
 - D. This Was Helpful** - the This Was Helpful button when clicked adds a count to the Helpful column of the grid, causing the article to display higher in the default listing. Once this button is clicked, it will disappear for that user on that article on future views.

Dashboard Create Ticket Knowledge Base AnnaMaria Gallozzi

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My student can't log in to the SIS Student Portal. What do I do? Category: Application Error

Have the student log in with the default password that was first assigned to them.

If the student does not know their default password, follow these steps:

1. Log in to Synergy
2. If you are an administrator, search for "Stu" in the Quick launch box.
3. Enter the student's name in the appropriate fields and search for the student by clicking on the "Find" button.
4. Once the student profile displays, click on "Other Info" tab.
5. Scroll down to the "Student Active Directory Info" section to see the default password.

By Aannamaria Gallozzi
Last updated on Apr 5, 2023

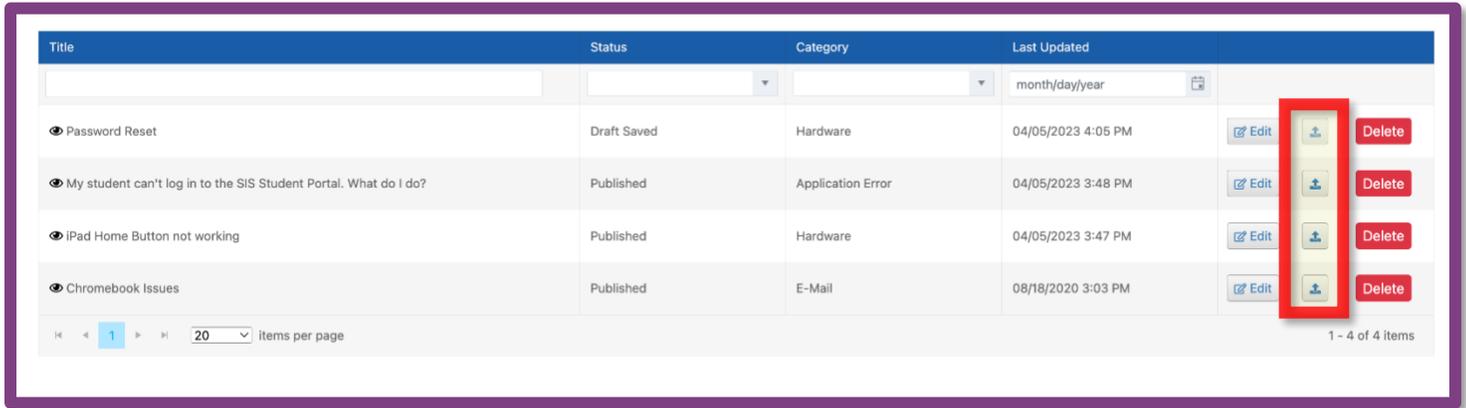
Was this helpful?
This was helpful

Related Articles

Share Article

The Service Desk and User Portal now have the option to quickly share Knowledge Base Articles with users.

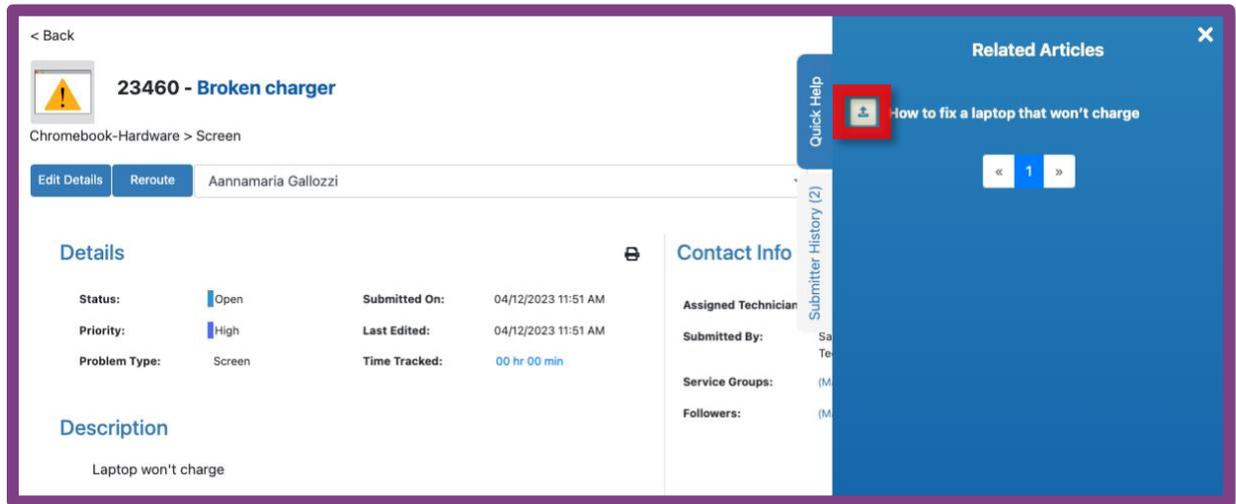
- The “Share Article” icon is present from:
 1. Service Desk > Knowledge Base > Article Grid. Only Published status Articles can be shared, otherwise the share icon is disabled.



Title	Status	Category	Last Updated	
👁 Password Reset	Draft Saved	Hardware	04/05/2023 4:05 PM	Edit  Delete
👁 My student can't log in to the SIS Student Portal. What do I do?	Published	Application Error	04/05/2023 3:48 PM	Edit  Delete
👁 iPad Home Button not working	Published	Hardware	04/05/2023 3:47 PM	Edit  Delete
👁 Chromebook Issues	Published	E-Mail	08/18/2020 3:03 PM	Edit  Delete

1 - 4 of 4 items

2. Service Desk > View Ticket - Quick Help flyout when viewing a ticket.



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 **23460 - Broken charger**

Chromebook-Hardware > Screen

[Edit Details](#) [Reroute](#) Aannamaria Gallozzi

Details

Status: Open Submitted On: 04/12/2023 11:51 AM

Priority: High Last Edited: 04/12/2023 11:51 AM

Problem Type: Screen Time Tracked: 00 hr 00 min

Description

Laptop won't charge

Contact Info

Assigned Technician

Submitted By: So Te

Service Groups: (M

Followers: (M

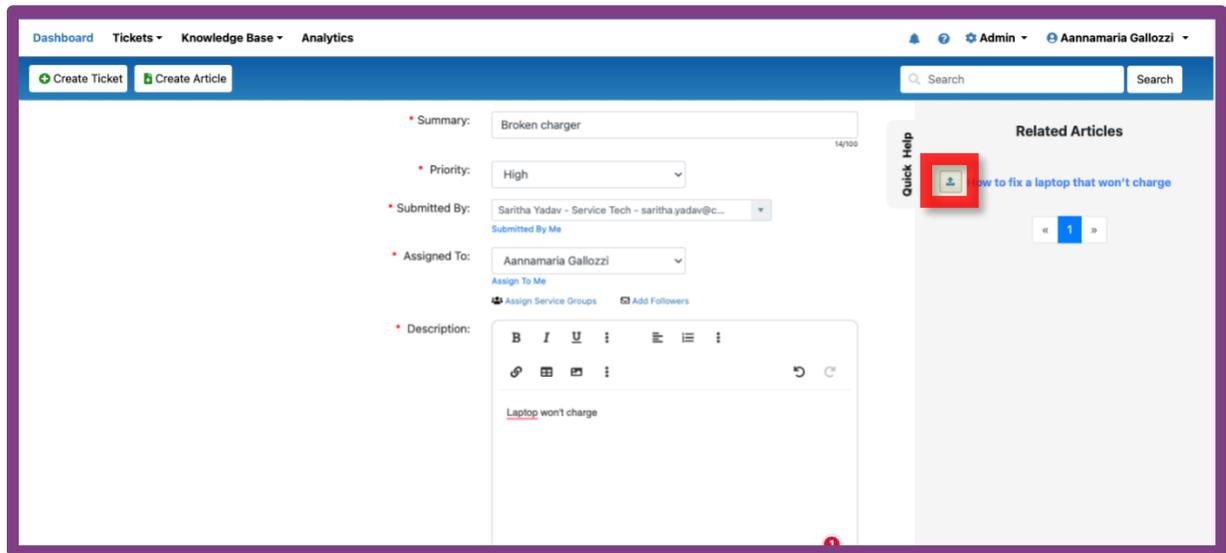
Quick Help

 **How to fix a laptop that won't charge**

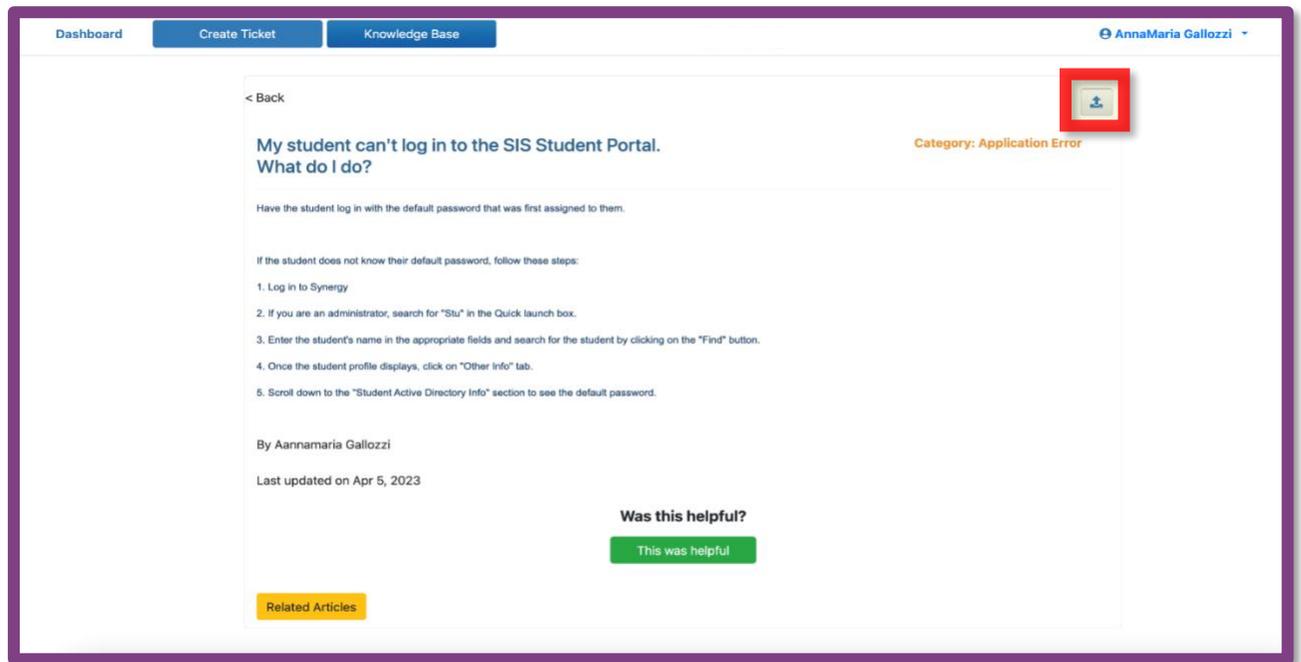
Submitter History (2)

« 1 »

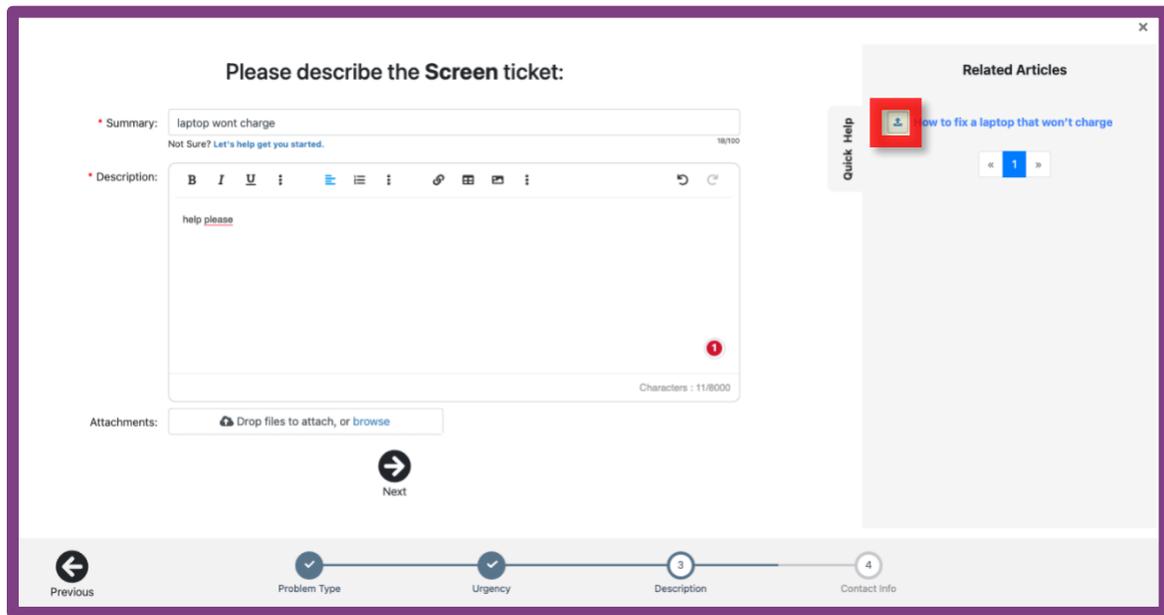
3. Service Desk > Create/Edit Ticket - Quick Help flyout when creating a ticket.



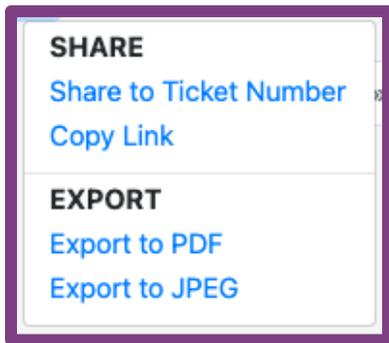
4. User Portal > Knowledge Base > Article Page - The share icon is present on the page displaying the article.



5. User Portal > Create Ticket - Quick Help flyout when creating a ticket.



- Clicking the Share Article icon will display an option tray to: Share to Ticket Number, Copy Link, Export to PDF, and Export to JPEG.

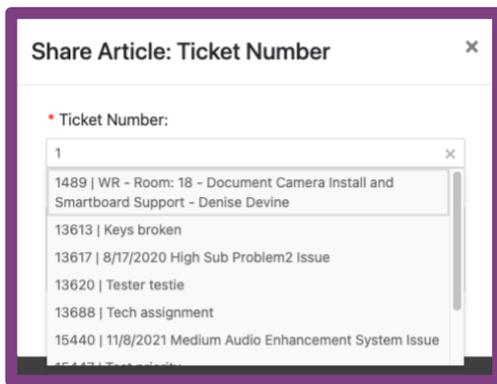


A. Share to Ticket Number

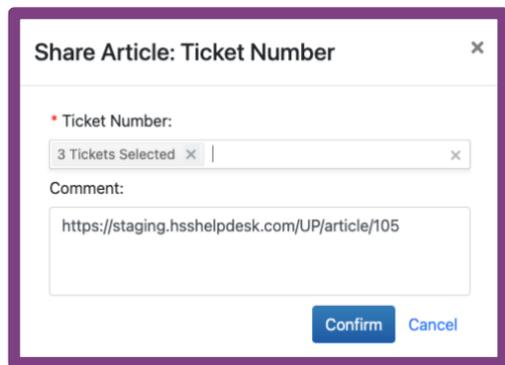
- A modal will popup to enter a Help Desk Ticket Number(s) and Comment. Tickets that are not closed or removed will be able to be searched.



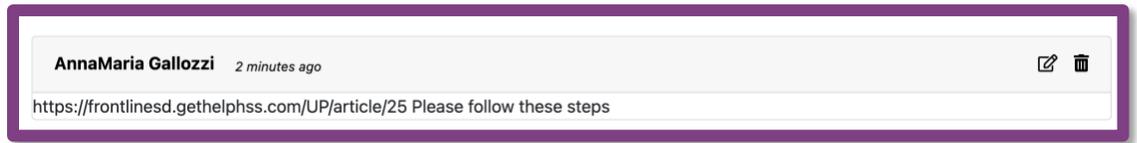
- Ticket Number Field
 - Ticket Number must be in the status of “Open”, “New”, “Pending Approval”, “In Progress”, or “On Hold”.
 - As a Staff, Student or General User: you will only be able to enter/search for ticket numbers you have submitted or are following.
 - As a Service Technician: you will only be able to enter/search ticket numbers you have *permission* to view.
 - As an Admin: you will be able to see all tickets in the system.
 - If a user types in a ticket number they do not have access to, they will not be allowed to Share the Article.
 - Only numeric numbers are valid entries in the Ticket Number field.
 - While typing, the first 10 matching Ticket Numbers will display as options to select.
 - While viewing options, the Ticket Summary will display next to the Ticket Number.



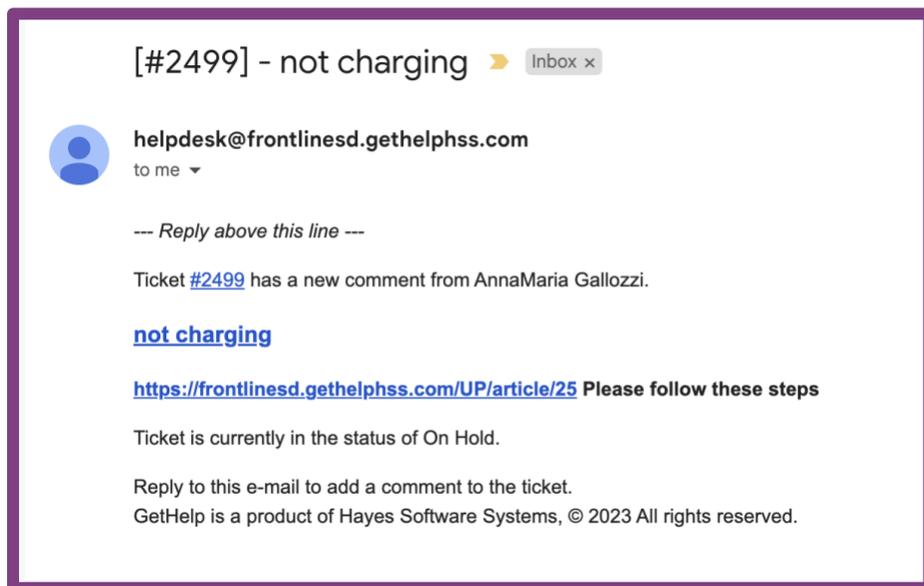
- Up to 100 Tickets can be selected to Share an article at one time.
 - Once 3 Ticket Numbers are selected, the display adjusts to show the quantity of tickets selected instead of the Ticket Numbers.



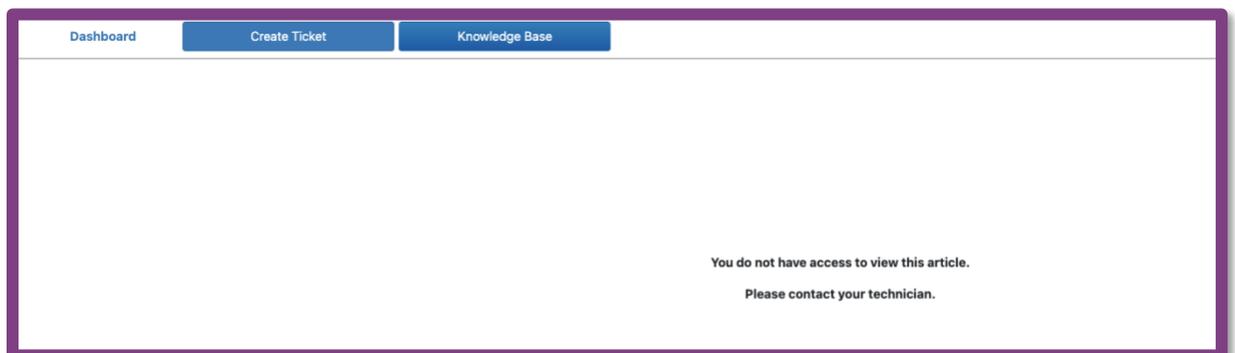
- Comment Field:
 - The link to the Knowledge Base Article will automatically appear in the Comments field.
 - If you remove the link to the Knowledge Base Article without adding your own comment text to the field, clicking Confirm will include the article link to the ticket Public Comments.



- If you remove the link the Knowledge Base Article and add your own comment text to the field, clicking Confirm will not include the article link to the ticket.
 - The comment box can hold 8,000 characters, similar to the other comment fields in the system. However, this comment field does not contain rich text editor, there for no formatting of the text or pictures can be added.
- The email will include a hyperlink to the knowledge base article.



- Clicking the link will prompt the user to sign into the Help Desk to validate credentials. A user must be logged into the Help Desk system to see a shared article. The Help Desk system will check to make sure the user has access to view the article. If the user does not have the appropriate permissions, it will not let them view the article.



Email Settings

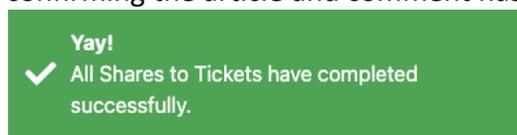
To ensure emails are delivered from Help Desk to users, please make sure these settings are turned on.

Depending on your notification set up, your user and technicians will receive email communication that the article has been posted.

The screenshot shows the 'Email Settings' configuration page. It is divided into four sections: 'Service Technicians', 'Service Groups', 'User Portal', and 'Followers'. Each section has a sub-header and a list of notification options. Red boxes highlight the following options:

- Service Technicians:**
 - Notify technician when a comment is added to a ticket assigned to them.
- User Portal:**
 - Notify user when a technician has added a comment to their ticket.
- Followers:**
 - Notify followers when any comment has been added to a ticket.

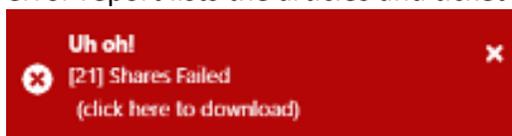
- Clicking Confirm will Share the Article to the tickets selected with comments entered.
 - If all tickets selected are successfully shared, a green toaster message will display confirming the article and comment has been shared successfully.



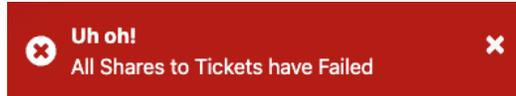
- If 5 or less tickets selected fail to successfully share, a red toaster message displays listing the ticket numbers.



- If more than 5 tickets selected fail to successfully share, a red toaster message displays listing the quantity of failures and a link to download an excel export of all the ticket email failures. A share to a ticket may fail when server connection is severed. This can happen due to a hiccup on the backend, or the internet connection is lost. The excel error report lists the articles and ticket numbers.



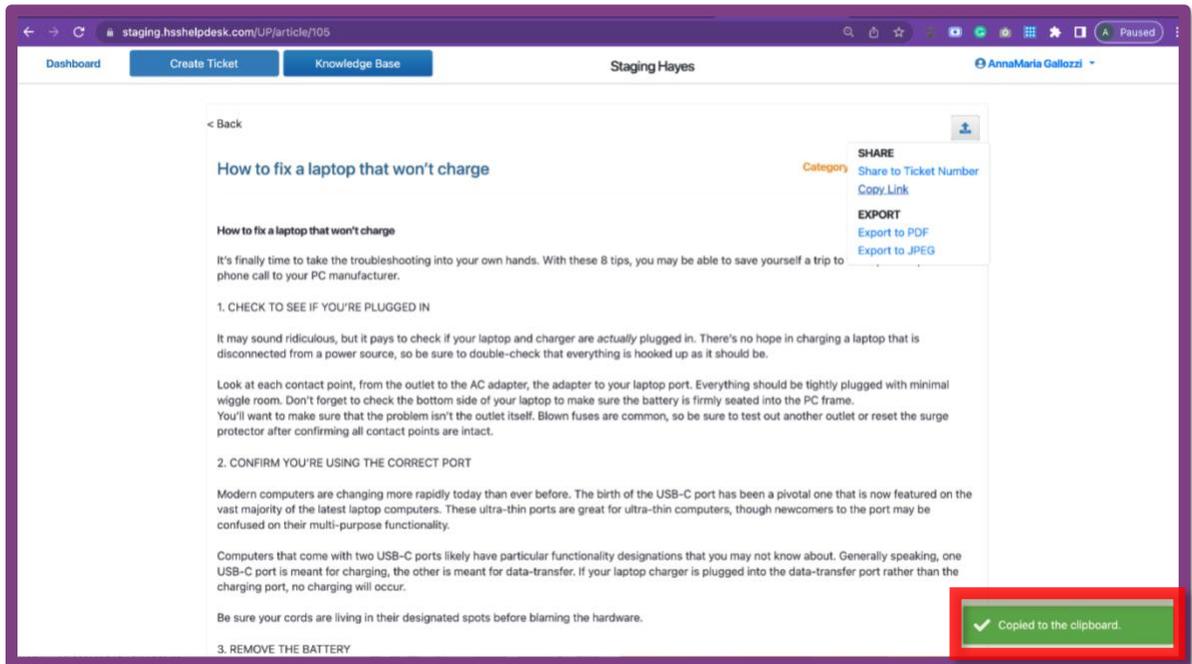
- If all tickets selected fail to successfully share, a red toaster message displays to let you know that ALL shares have failed.



- A user must be logged into the Help Desk system to see a shared article. The Help Desk system will check to make sure the user has access to view the article. If the user does not have the appropriate permissions, it will not let them view the article.

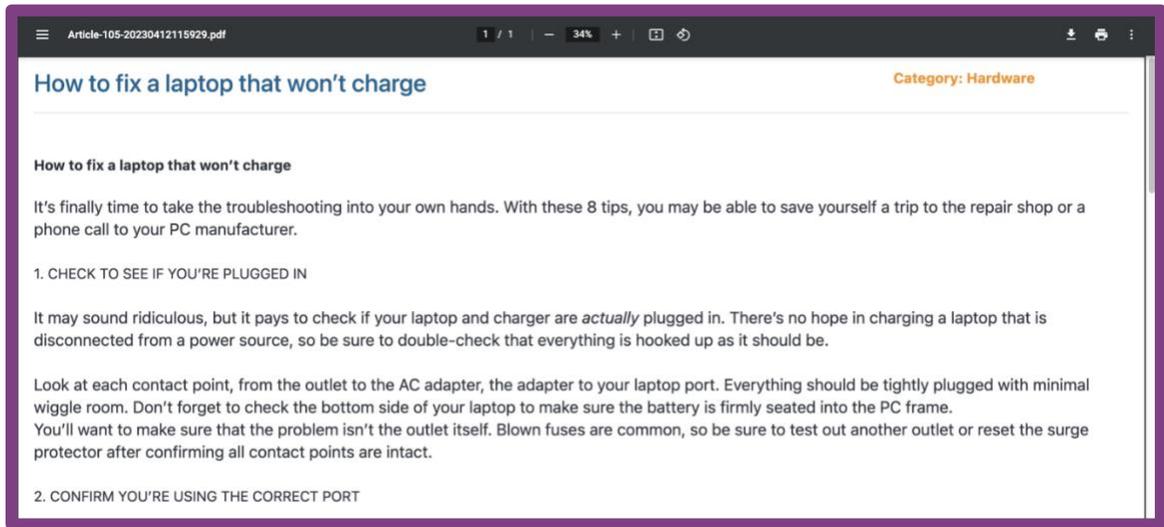
B. Copy Link

- Clicking Copy Link will automatically copy the Knowledge Base Article URL to your clipboard where you can paste in a ticket comment, ticket description, or in your browser address bar.
- This Knowledge Base Article URL once copied can be shared outside the system as well.
- A user must be logged into the Help Desk system to see a shared article. The Help Desk system will check to make sure the user has access to view the article. If the user does not have the appropriate permissions, it will not let them view the article.



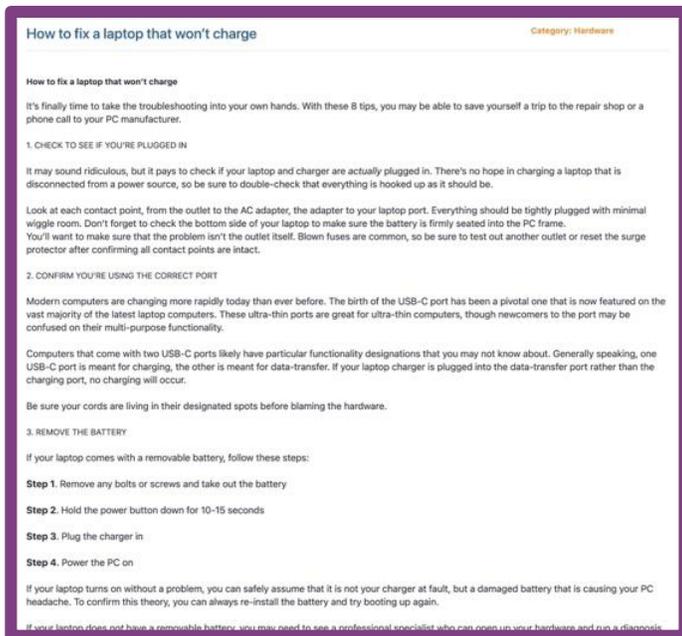
C. Export to PDF

- Clicking Export to PDF will download a PDF file version of the Knowledge Base Article. The file will open in your preferred PDF application.



D. Export to JPEG

- Clicking Export to JPEG will download a JPEG file version the Knowledge Base Article.



NOTES:

- A user must be logged into the Help Desk system to see a shared article. The Help Desk system will check to make sure the user has access to view the article. If the user does not have the appropriate permissions, it will not let them view the article.
- If an article link is shared on a ticket, a technician or admin will not be able to access the articles page. This feature will be added in upcoming Help Desk version 7.2 release, along with Technician only articles. When a technician or admin clicks on the link, it will redirect them to the dashboard. Staff, Students or General Users will be able to view the article in the User Portal if they have the appropriate permissions.

Other Considerations:

- When an article is shared to a technician or admin through a link, the technician or admin will be redirected to the dashboard. We have identified this bug and will be fixing it in version 7.2 this summer. This fix will also introduce “Technician Only Articles”.
- To copy an article link, the user can also copy the URL from your browser address bar.