



(Formerly GetHelp)
Version 7.2 Release Documentation

Frontline Education is happy to announce the release of Help Desk Management version 7.2 which includes the following enhancements:

- 1) User Management- Change User Type from Service Technician/Service Admin to User**
- 2) Service Desk Knowledge Base Articles**

1. User Management- Change User Type from Service Technician/Service Admin to User

When a Service Technician or Service Admin changes user roles in Help Desk Management and needs to make the move to User, we have streamlined the process for the Service Admin to make this change.

How Single Sign On effects user type changes:

There are no changes being made to how Help Desk and your SSO provider interact. Below is information on how users are imported into your system and scenarios to change a user.

- Currently, when your SSO is implemented, there are different ways a user can be set up.
 - Staff members can be imported as either Users or Service Technicians, but not both.
 - Students can be imported as Users only.
- If a user type changes in SSO it may not change directly in Help Desk for three reasons:
 - The user type is a Service Admin or Technician who have items assigned to them.
 - The user type is a Service Admin or Technician who have logged in already.
 - The user type is a User that has logged in already.
- When you encounter one of these scenarios, as an admin, you will need to change the user manually in Help Desk. Now, when you downgrade a user from a Service Technician or Admin manually, the system has added streamlined steps to help you make this change.

Change a Service Technician/Service Admin to User

From the Admin drop-down, Select User Management, All Users.
Once on the All User grid, click Edit and change the "User Type" to "User."

Edit User

* Username: jaldaz

* First Name: Jared

Middle Name:

* Last Name: Letooo

* E-Mail: ghtesting5@hayessoft.com

Phone Number:

* User Type: Service Admin
 Service Technician

* Role: User

Service Groups:

Save Cancel

When “User” is selected a pop up “Change User” will appear. This pop-up will allow you as an Admin to view what the Service Technician/Service Admin user is assigned to, routing rules in their name, and service groups they are in.

Change User [X]

Attention! Change user type can not take place until further action is taken.

i jaldaz currently has assigned tickets, service groups or routing rules. A list of all the related items for this user is below. Please remove this user from these items and then the user type can be changed.

Assigned Tickets

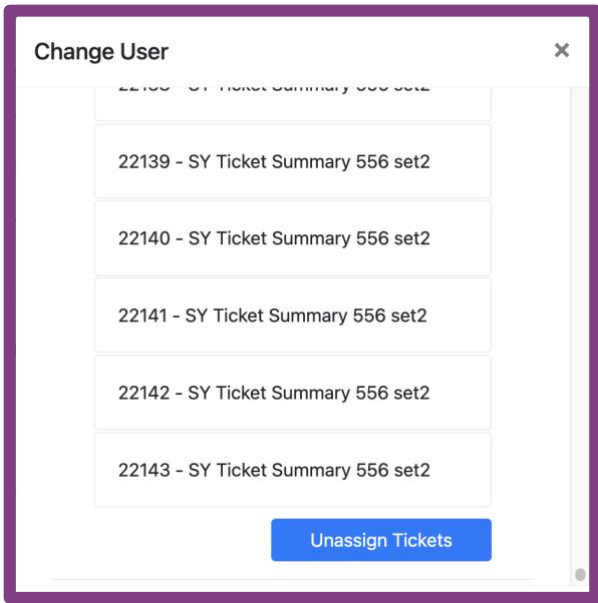
10013 - GW: Larry Hill reports he can't find Firefox on his lab PCs

10014 - JH: Joseph Neal reports Jahkarri

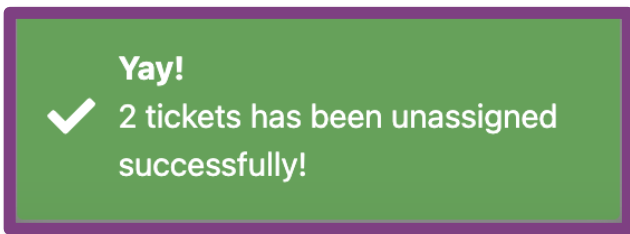
Return to Edit User

Unassign Tickets

As an Admin you can unassign the tickets directly by hitting the “Unassign Tickets” button. This button will move ALL tickets that were assigned to unassigned while not changing the status of the ticket. For example, if the Service Technician/Service Admin were assigned to a ticket “In Progress”, the ticket will remain in the status of “In Progress” and now be unassigned.

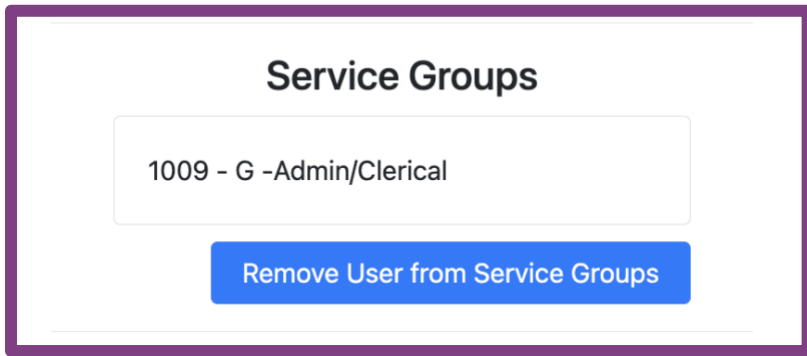


When the tickets have successfully been unassigned, you will see a success message.

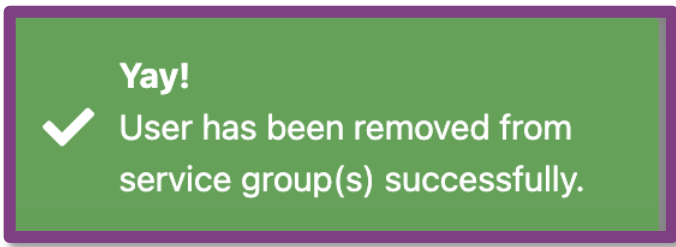


Remove User from Service Groups

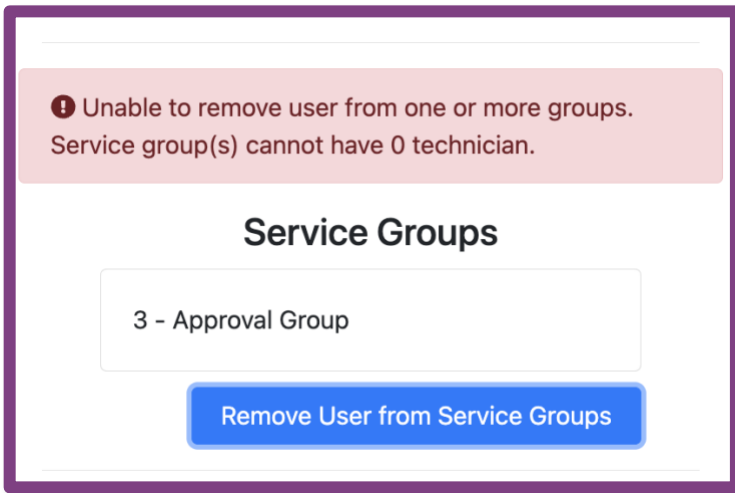
Clicking the "Remove User from Service Groups" button will remove the user from the service group listed.



If the service group has other technicians assigned to it, the user will be successfully removed from the service group and success message will congratulate you!

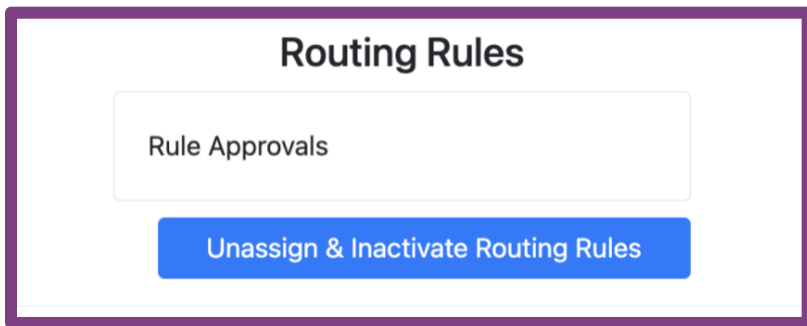


NOTE: If the service group does not have other technicians assigned to it, an error message will display on the screen. You will need to go to the Service Groups page and add an alternative technician before this technician can be removed.



Unassign & Inactivate Routing Rules

Clicking "Unassign & Inactivate Routing Rules" will remove the user from the service group listed.



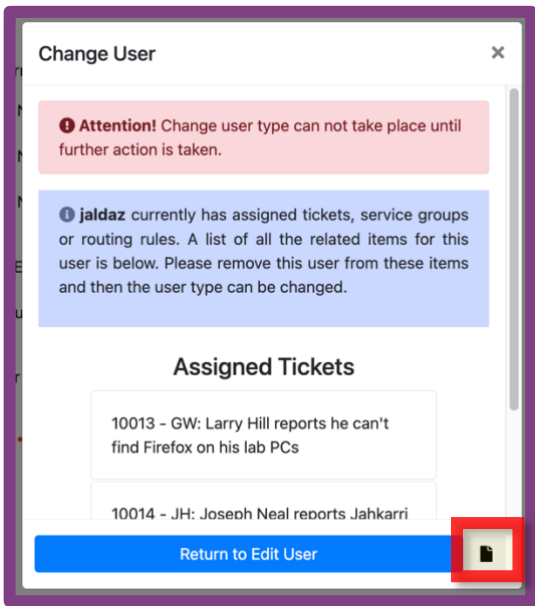
When routing rules have successfully been unassigned and inactivated, you will get a success message and the Routing Rules will no longer display for this user.



Nothing will cause an error for the Unassign & Inactivate Routing Rules action. When a routing rule has been moved to Unassigned & Inactivated, the rule is not deleted, it will persist in your routing rules but be disabled. You can enable it again once you reassign who it should route to.

Export to CSV

View each item effected by changing the User Type by clicking the Report icon to export a CSV. When hovering over the report icon, the tooltip will say, "Export to CSV" and file name of the CSV will be the username of the user you are attempting to change.



Once you open the "username.csv" file, the headers for each section will appear in column A. If the Service Technician/Service Admin does not have one of the headers "Assigned Tickets", "Service Groups", or "Routing Rules", the header will not appear in the CSV.

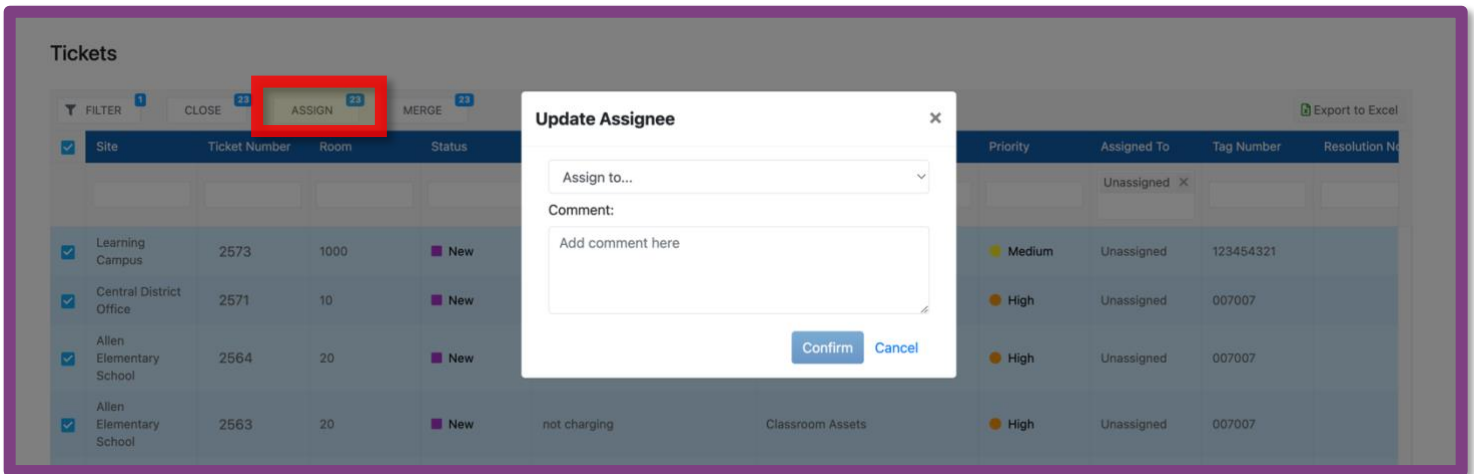
	A	B	C	D	E	F	G	H
1	Assigned Tickets							
2		Ticket						
3		1394 - JH & LC - Room: JH-321 & LC-214 - Cart Support						
4		1455 - USer not able to login to a computer						
5		1488 - TC - Charger Replacement - Sheila						
6		1573 - MV - Laptop Replace with Yoga 380 - Holly						
7		1642 - MM - Room: Main Office - Scanner Setup - Theora						
8		1722 - LC: Joanne reports Phone issue with classroom 204A in the school support suite.						
9		1753 - PH: Kathryn needs help installing her printer.						
10								
11	Service Groups							
12		Group						
13		2 - Group 1						
14								
15	Routing Rules							
16		Rule						
17		Rule Approvals						
18								

View and Assign Unassigned Tickets

To see unassigned tickets, navigate to the ALL TICKETS grid and filter the “Assigned To” field for Unassigned.

Site	Ticket Number	Room	Status	Summary	Problem Type	Priority	Assigned To	Tag Number	Resolution No
							Unassigned		
Learning Campus	2573	1000	New	5/30/2023 Medium HVAC Maintenance Issue	HVAC Maintenance	Medium	Unassigned	123454321	
Central District Office	2571	10	New	5/26/2023 High Classroom Assets Issue	Classroom Assets	High	Unassigned	007007	
Allen Elementary School	2564	20	New	5/11/2023 High Classroom Assets Issue	Classroom Assets	High	Unassigned	007007	
Allen Elementary School	2563	20	New	not charging	Classroom Assets	High	Unassigned	007007	
	2553		New	test email with attachment	Technology	Medium	Unassigned		
	2552		New	broken screen	Technology	Medium	Unassigned		
	2551		New	charging issue	Technology	Medium	Unassigned		

Assign Tickets in bulk by clicking the check boxes on the left to select the tickets you want to assign to a service technician. Click the “Assign” button at the top of the All Tickets grid. Choose the “Assign to” technician from the dropdown and click “Confirm”.



You can also navigate to unassigned tickets from the dashboard or by clicking “Tickets” and choosing “Unassigned Tickets”. Once on the Unassigned Tickets page, you can assign individual tickets.

Ticket	Priority	Problem Type	Summary	Status	Submitted By	Submitted On	Assign To
2573	Medium	Buildings & Grounds > HVAC Service > HVAC Maintenance	5/30/2023 Medium HVAC Maintenance Issue	New	James Bond	05/30/2023 9:23 AM	
2571	High	Technology > Classroom Assets	5/26/2023 High Classroom Assets Issue	New	James Bond	05/26/2023 10:16 AM	
2564	High	Technology > Classroom Assets	5/11/2023 High Classroom Assets Issue	New	James Bond	05/11/2023 5:03 PM	
2563	High	Technology > Classroom Assets	not charging	New	James Bond	05/11/2023 12:19 PM	
2553	Medium	Technology	test email with attachment	New	Rudy Ordonez	05/02/2023 2:49 PM	
2552	Medium	Technology	broken screen	New	aminata.mbacke@aol.com	05/01/2023 3:04 PM	

Edit Technicians Assigned to Service Groups

To edit the technicians assigned to service groups, navigate to “User Settings”, then click “Service Groups”. Find the service group and click “Edit”. In the Technicians List section, add and remove the appropriate Service Technician/Service Admin to ensure at least 1 person is listed.

Name *

Approval Group

Description 14/25

Please enter a description of the service group...

0/250

Technicians List

Bob Tech x Bob Tech2 x

Problem Types This Group Works On

GH issues x iPad-Software x Level 2 Support x New Problem Type x Peripherals-Hardware x Regression_6.2 x

Group E-Mail Notifications

Notify when added to ticket.

Notify when ticket is closed.

Notify when ticket is reopened.

Deactivate

2. Service Desk Knowledge Base

The All Articles Grid serves as a centralized hub, where technicians and admins can browse and access the entire collection of Technician Only Articles. This centralized view streamlines knowledge discovery and retrieval.

These updates to the Technician Only Articles and All Articles Grid empower technicians and admins with robust collaboration tools and seamless article management capabilities, leading to improved knowledge sharing and streamlined workflows.

All Articles Grid - Create and Access Technician Only Articles

The Technician Only Articles feature facilitates seamless internal collaboration and knowledge sharing among technicians and administrators. This feature enables technicians and admins to create and share articles specifically intended for internal use, without being visible to end users (staff and students). These Technician Only Articles serve as a repository of valuable notes and processes, fostering efficient communication within the service desk team.

To Create a New Technician Only Article

- Click on the “Create Article” button at the top navigation.
- Once the “Create Article” page opens you will choose the “Technician Only Article” checkbox.

Dashboard Tickets Knowledge Base Analytics

Create Ticket Create Article

Create Article

* Article Name: 0/100

* Category:

* Keywords:

Link to Tickets:

Technician Only Article

Hide this article from User Portal

Hide this article from Students

* Summary:

By choosing the “Technician Only Article” the article will be hidden from end users and only accessible to Technicians and Admins.

When “Technician Only Article” is chosen, the “Hide this article from User Portal” and “Hide this article from Students” will be automatically selected and grayed out, Students and Staff will not have access to this article.

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.

Open Knowledge Base Articles from the Service Desk

Technicians and admins can now click on the hyperlinks within the All Articles and My Articles Grids to open the articles in the current tab, however, you can right click the hyperlink and open the article in a new tab. This improvement enables a more immersive reading experience and seamless navigation between articles.

- 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.

My Articles

View My Articles

Title	Status	Category	Last Updated	Actions
Google Chromebook Update failed (Error: 7 or 12)	Published	Application Error	06/01/2023 4:30 PM	Edit Share Delete
How to fix a laptop that won't charge	Published	Hardware	04/11/2023 3:25 PM	Edit Share Delete
Chromebook Issues	Published	E-Mail	08/18/2020 3:03 PM	Edit Share Delete

1 - 3 of 3 items


Dashboard Tickets Knowledge Base Analytics Admin AnnaMaria Gallozzi

Create Ticket Create Article Search Search

Articles

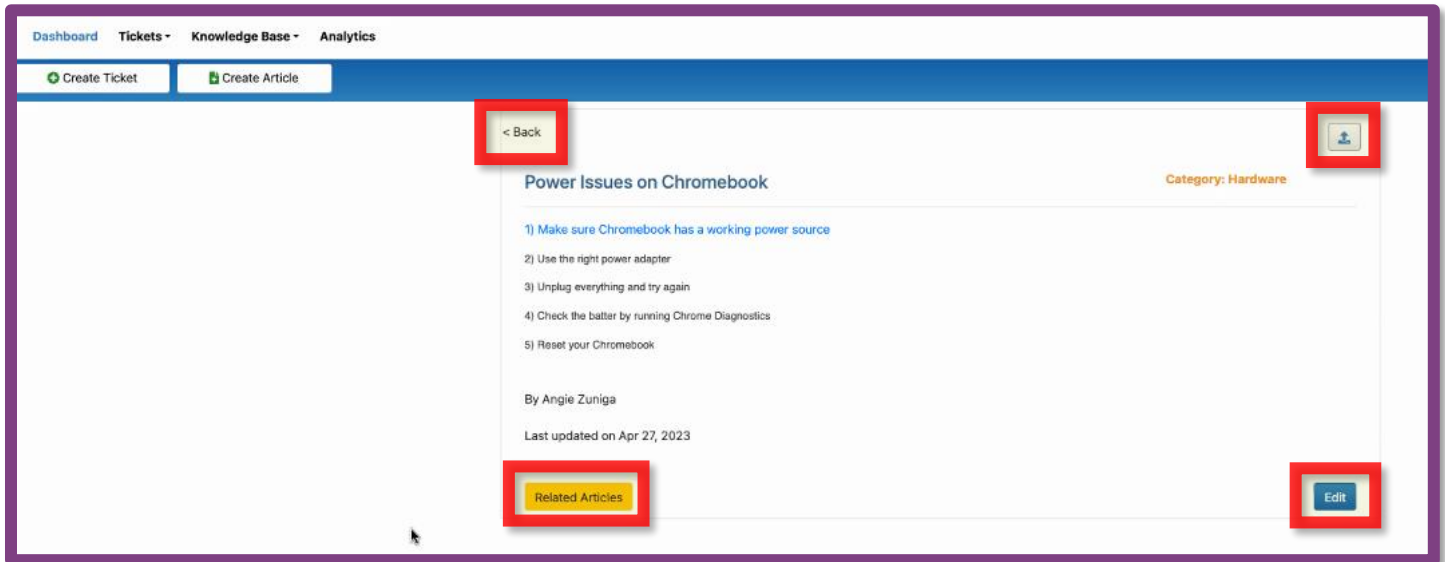
View All Articles

Title	Author	Status	Category	Last Updated	Actions
Google Chromebook Update failed (Error: 7 or 12)	Mike Hayes	Published	Hardware	06/08/2023 1:01 PM	Edit Share Delete
Power Issues on Chromebook	Angie Zuniga	Published	Hardware	04/27/2023 9:35 AM	Edit Share Delete
Chromebook Charging	AnnaMaria Gallozzi	Published	Hardware	04/19/2023 2:13 PM	Edit Share Delete
Pending Approval Tech	Pari Vummethala	Published	Hardware	04/09/2023 5:27 PM	Edit Share Delete
Clear browsing data	Mike Hayes	Published	Hardware	11/12/2022 5:58 PM	Edit Share Delete
How to Take a screenshot on Mac	Joe Siam	Published	Other	08/23/2021 11:44 AM	Edit Share Delete
Powerwashing Chromebook	Pam DeSanto	Published	Other	04/12/2021 8:15 AM	Edit Share Delete
How to login to gmail	Ian McHugh	Published	E-Mail	03/19/2021 9:49 AM	Edit Share Delete
It's Not the Network	Mike Ward	Published	Network	01/06/2021 3:45 PM	Edit Share Delete

- The article page has different options for the user to select:
 - Back** - the back button opens the Knowledge Base Article grid with their search results persisted. If no search criteria were entered on the article grid, the back button will display articles sorted by last edited.
 - Share Button** – this icon  will open a share tray with multiple options for the end user to utilize. See below for further details. Now that each knowledge base article has its own page and URL, technicians and admins can all access the article if a link is shared on a ticket. Technicians and admins can now also copy article URLs from the dedicated article pages.

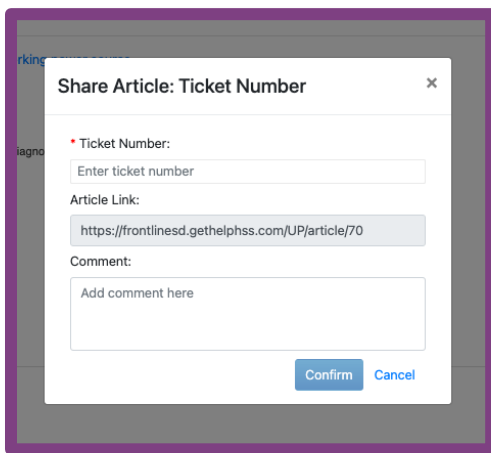
C. Related Articles - the Related Articles button will display articles on the grid with the same category as the article they are viewing.

D. Edit - the Edit button opens the Knowledge Base Article for editing. If a technician does not have access to “Create an Article” under user roles, the edit button will not be present

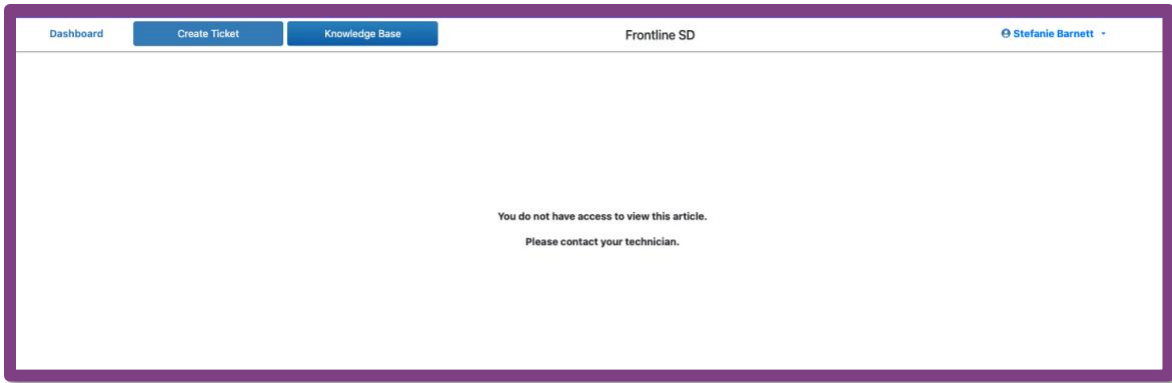


Notes:

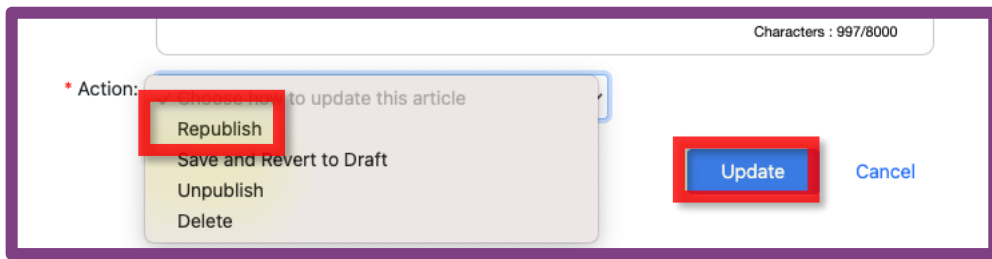
- Please be aware, sharing a “Technician Only Article” through the “Share to Ticket Number” feature will add to a ticket public comment. In an upcoming release, the “Share to Ticket Number” feature will share a “Technician Only Article” to a private comment.



- If you share a “Technician Only Article” with an end-user (Staff or Student) and they try to access the article URL they will see a notification that states “You do not have access to view this article. Please contact your technician.”



- When editing an already existing article, you will need to Republish the article for it to be searchable. To republish an article, follow these steps:
 - Make your edits or access decisions.
 - In the drop down choose “Republish” to publish your changes



- Click update when you are ready to save.
- Only knowledge base articles in a status of Published will be displayed in Quick Help and Shared to Private Comments.
- Preview eye icon has been removed from the Knowledge Base grids and has been replaced with the hyper link to view articles on All Articles and My Articles grids.

Title	Author	Status	Category	Last Updated	
Google Chromebook Update failed (Error: 7 or 12)	Mike Hayes	Published	Hardware	06/01/2023 4:21 PM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
Chromebook Charging	AnnaMaria Gallozzi	Published	Hardware	12/08/2022 11:25 AM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>

Below is the new grid layout with the preview icon removed and the article titles hyperlinked.

Dashboard | Tickets | Knowledge Base | Analytics | Admin | AnnaMaria Gallozzi

Create Ticket | Create Article | Search

Articles

View All Articles

Title	Author	Status	Category	Last Updated	Actions
Google Chromebook Update failed (Error: 7 or 12)	Mike Hayes	Published	Hardware	06/08/2023 1:01 PM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
Power Issues on Chromebook	Angie Zuniga	Published	Hardware	04/27/2023 9:35 AM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
Chromebook Charging	AnnaMaria Gallozzi	Published	Hardware	04/19/2023 2:13 PM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
Pending Approval Tech	Pat Yumwethala	Published	Hardware	04/09/2023 5:27 PM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
Clear browsing data	Mike Hayes	Published	Hardware	11/12/2022 5:58 PM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
How to Take a screenshot on Mac	Joe Slam	Published	Other	08/23/2021 11:44 AM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
Powerwashing Chromebook	Pam DeSanto	Published	Other	04/12/2021 8:15 AM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
How to login to gmail	Ian McHugh	Published	E-Mail	03/19/2021 9:49 AM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>
It's Not the Network	Mike Ward	Published	Network	01/06/2021 3:45 PM	<input type="button" value="Edit"/> <input type="button" value="Down Arrow"/> <input type="button" value="Delete"/>