Help Desk Management

(Formerly GetHelp)
Version 7.2.1 Release Documentation

Frontline Education is happy to announce the release of Help Desk Management version 7.2.1 which includes the following enhancements:

1) **Service Desk Knowledge Base Articles - Technician Only View**

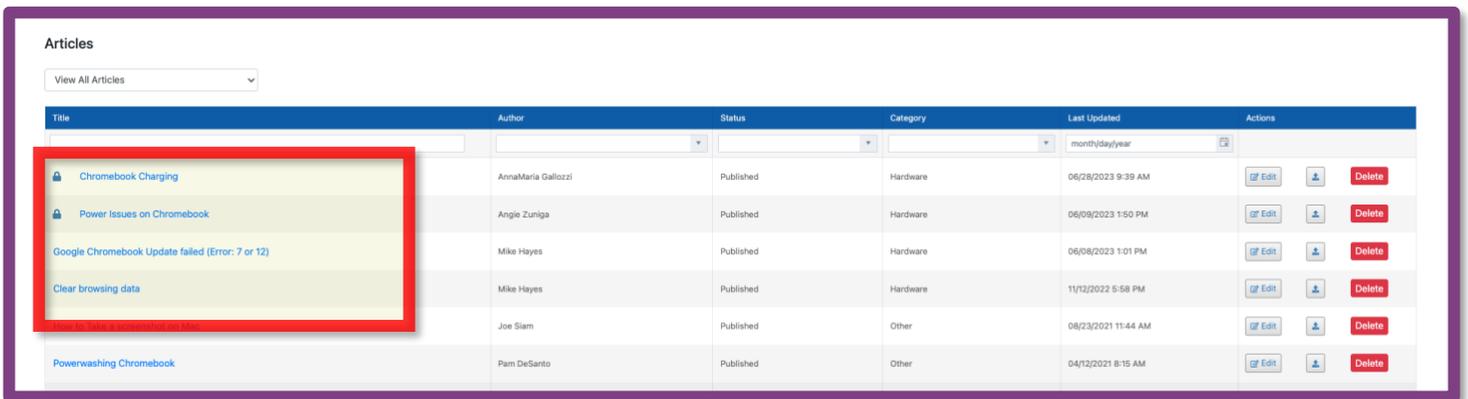## 1.Service Desk Knowledge Base - Technician Only View

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. In this update, we have made it easier to visually see the technician only articles and share those articles between technicians in Private Comments on a ticket.

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.
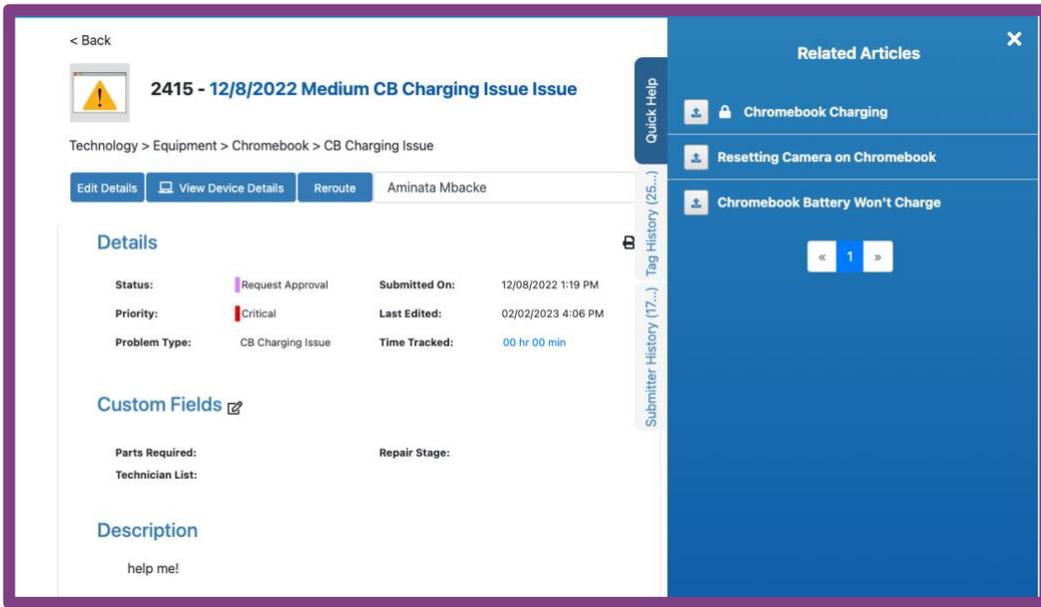
Visual Cues for Technician Only Grid

The biggest addition to Help Desk in 7.2.1 are the visual cues added to help assist users with understanding which articles are for technician use only.

The first visual cue is on the All Tickets and My Tickets grid, the lock icon highlighted below will show on both grids indicating a Technician Only article.
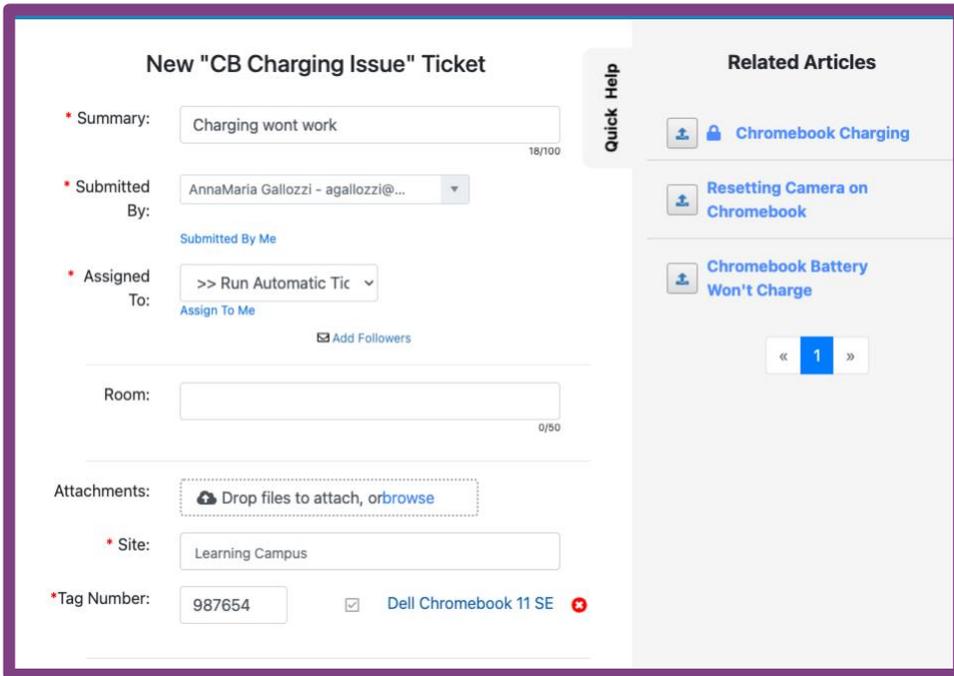

Quick Help flyouts will now notate, with the same lock on the All Articles & My Articles grid, when an article is a technician only article.

Quick Help flyouts are visible when viewing an open ticket as shown above and when creating a ticket, as shown below.

Technician only articles, when using the "Share to Ticket" button can only be shared to private notes. Since technicians are the only ones who can see the articles, we have made it simpler for these to be shared internally.
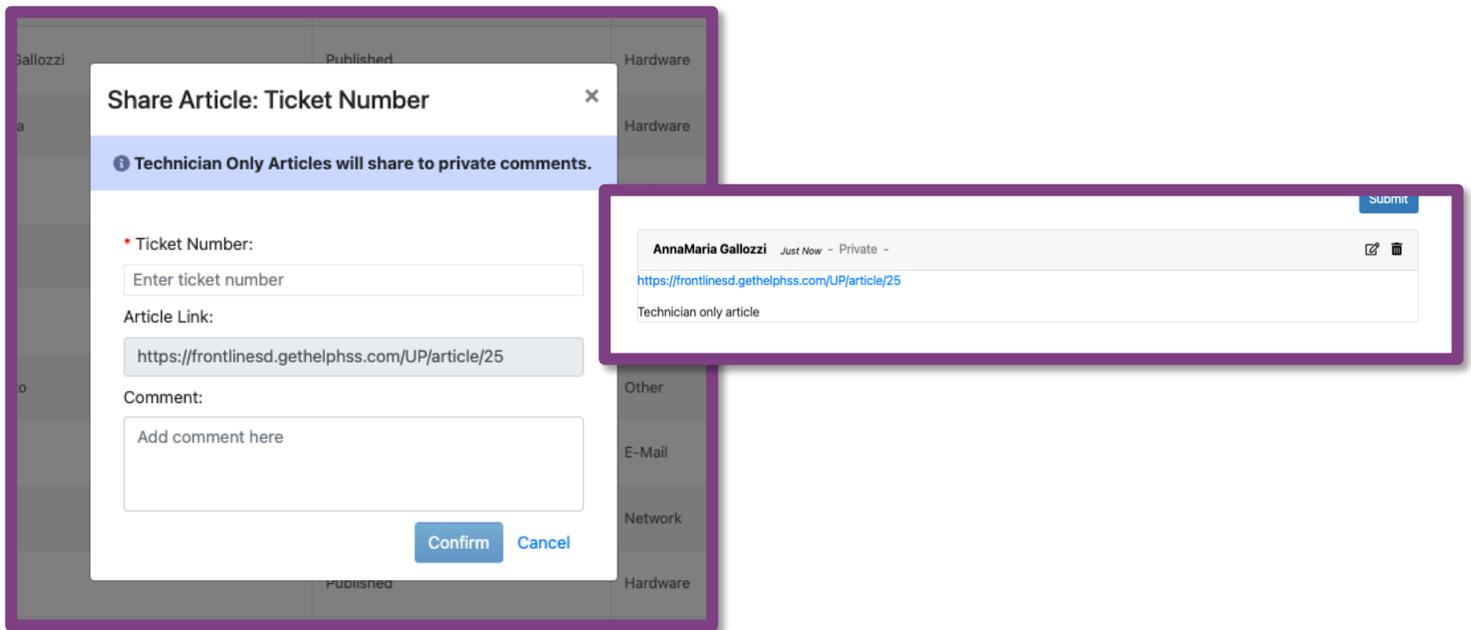
All Articles Grid - Create and Access Technician Only Articles

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.

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.

- 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 were entered on the article grid, the back button will display articles sorted by last edited.

  B. 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
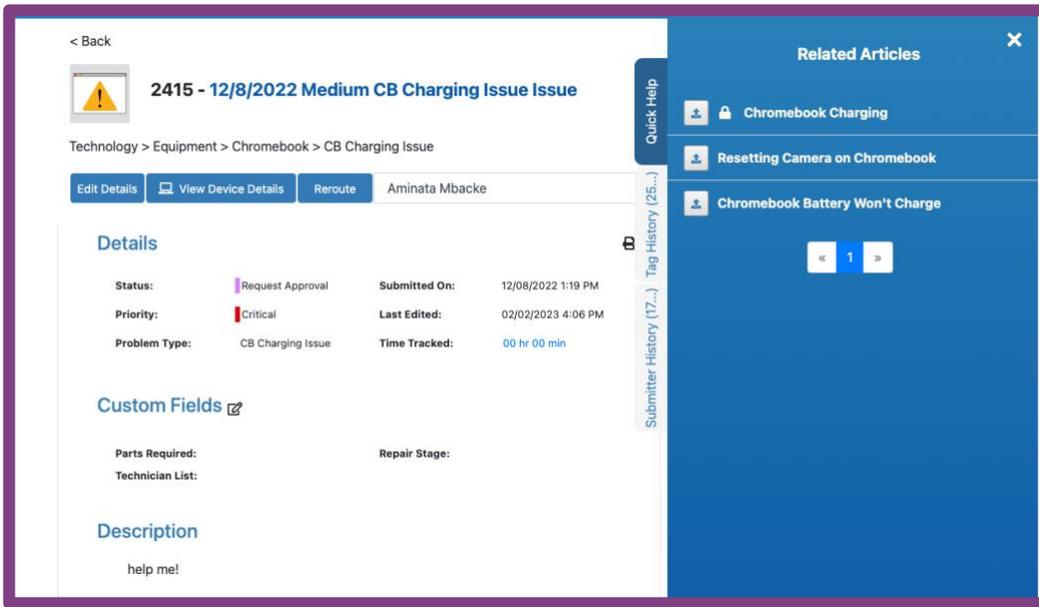

- Technician only articles, when using the "Share to Ticket" button can only be shared to private notes. Since technicians are the only ones who can see the articles, we have made it simpler for these to be shared internally.
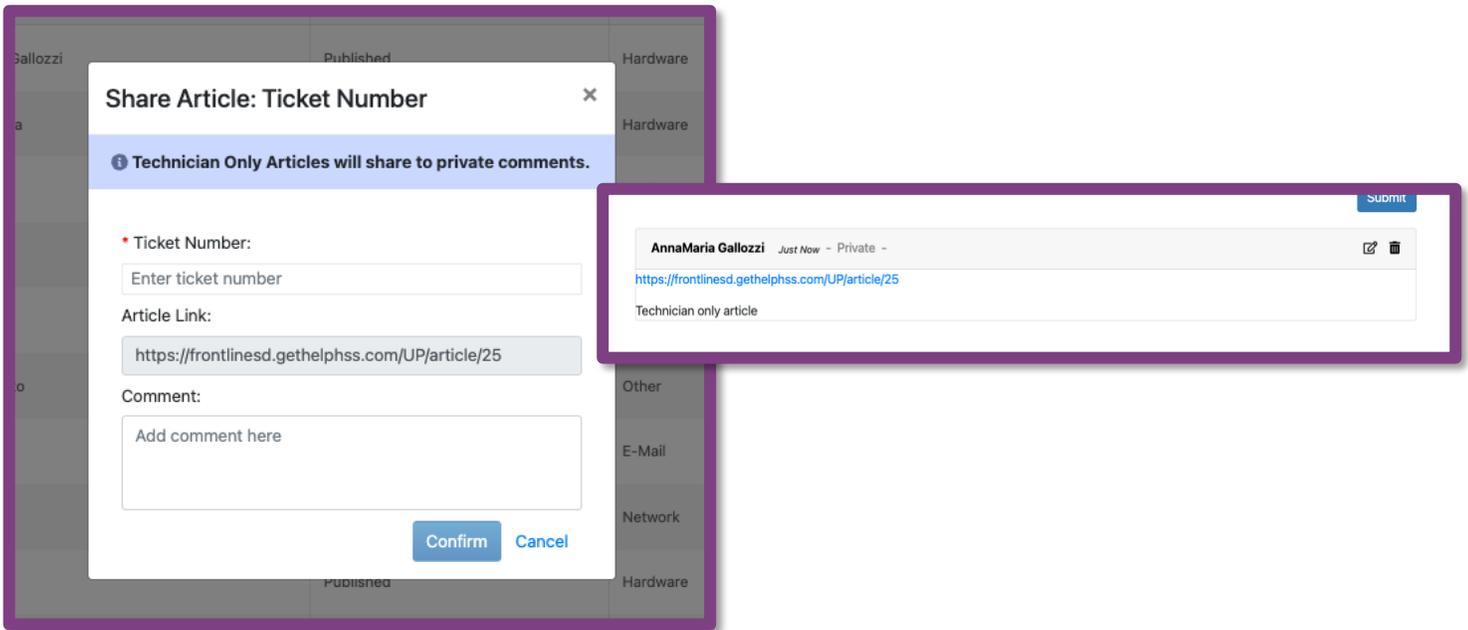
Quick Help Knowledge Base Articles from the Service Desk

Quick Help flyouts will now notate, with the same lock on the All Articles & My Articles grid, when an article is a technician only article.

Quick Help flyouts are visible when viewing an open ticket as shown above and when creating a ticket, as shown below.

In either scenario, when the article is open, it will open in the flyout for you to view, copy, or share to other users.

The same options for sharing are available:
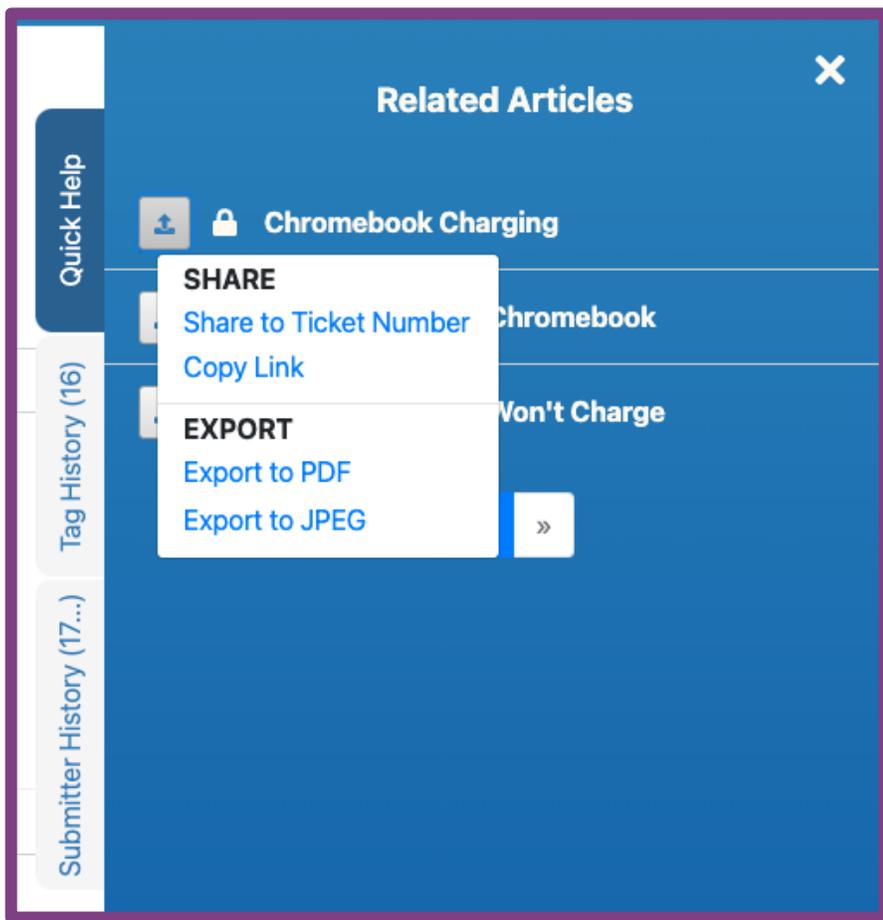
- **Share to Ticket Number**
  - A modal will popup to enter a Help Desk Ticket Number(s) and Comment. Tickets that are not closed or removed will be able to be searched.
  - For technician only articles the Share to Ticket will only post the article link in Private comments as stated above
- **Copy Link**
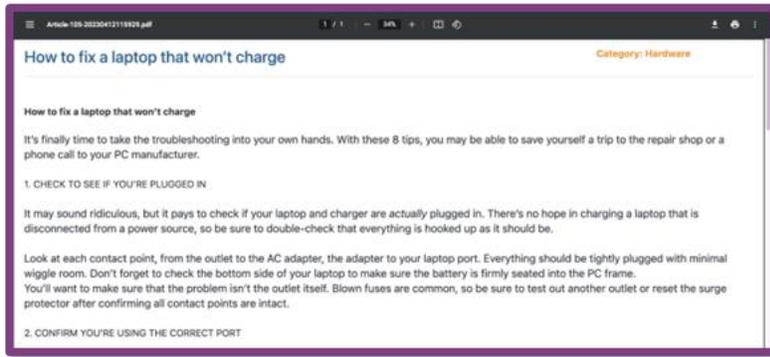 - A green toaster notification will pop-up alerting you that the link has been copied to your clipboard.
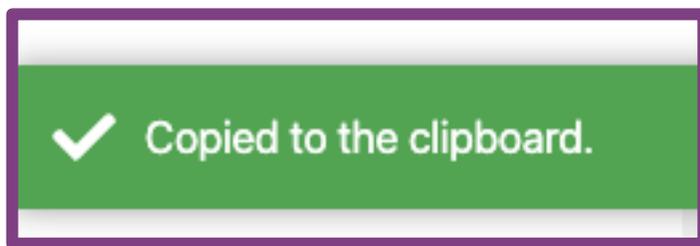
- **Export to PDF**
  - Clicking Export to PDF will download a PDF file version of the Knowledge Base Article. The file will open in your preferred PDF application.

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

Notes:

- 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.