(Formerly GetHelp)
Version 7.3 Release Documentation

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

1. **Parts Management: Grid, Site Inventory, Product Assignment, Inventory History, Minimum Stock**

Parts Management: Grid, Site Inventory, Product Assignment, Inventory History, Minimum Stock, User Management

Help Desk and Asset Management customers can now add and track untagged consumable parts at each site. Parts Management helps inventory the untagged parts needed for repairs across your district, whether that is for Technology, Maintenance, or Operations, your teams will have the perfect spot to track your consumables.

NOTE: Only customers with both Asset Management and Help Desk Management can utilize Parts Management. For a more streamlined process, having Parts Management in Inventory and Help Desk Management allows for staff to quickly identify and use parts that are maintained in the inventory system, along with the help desk system. This will also allow for cost control to avoid overstocking and make sure that parts are allocated appropriately.

User Management: Roles

Admins have permissions to view, edit, and add Parts to the Parts Management grid. Admins can also determine which technicians have permissions:

- **View Parts**- ability to only view the parts grid
  - If View Parts is unchecked, Add/Edit Parts, Add/Remove Inventory Quantity, Add/Remove Associate Product will be disabled
  - View Parts allow technicians to see ALL parts across ALL sites, regardless of their site permissions
- **Add/Edit Parts-** add new Parts catalog items/edit existing Parts catalog items
- **Add/Remove Inventory Quantity-** update inventory quantity for Parts at the site
- **Add/Remove Associate Product-** associate a Product, in the Product Catalog, to a Part

Parts Management

- [x] View Parts
- [x] Add/Edit Parts
- [x] Add/Remove Inventory Quantity
- [x] Add/Remove Associate Product
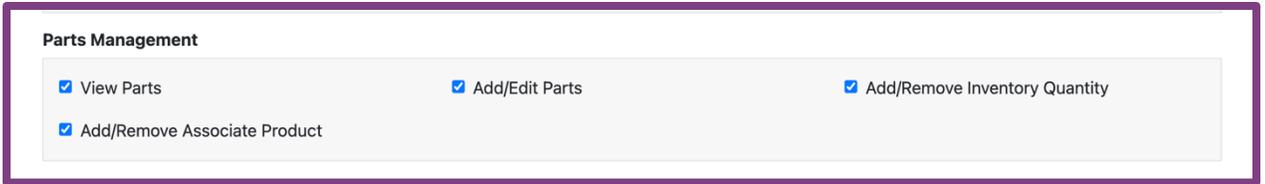
Steps to Edit Permissions for Parts Management in User Roles:

- Login as an Service Admin
- Navigate to the top of the application and locate the "Admin" drop-down menu.
- From the Admin drop-down, select "User Management" to access further options.
- Within the User Management options, select "Roles" to proceed to the permissions editing interface.

NOTE: The Default Service Technician Role now includes Parts Management permissions by default. This encompasses all associated permissions as detailed below. For pre-existing roles, administrative action is required to enable Parts Management Permissions. Upon updating roles, Parts Management functionality will become available to all users assigned to the updated roles.

Parts Management Grid

Upon successful login, Admins and Technicians with the necessary permissions will notice a new "Parts" option in the top navigation bar of the application. Clicking on "Parts" will display a drop-down menu, where users can select "All Parts" to proceed to the Parts Management page.
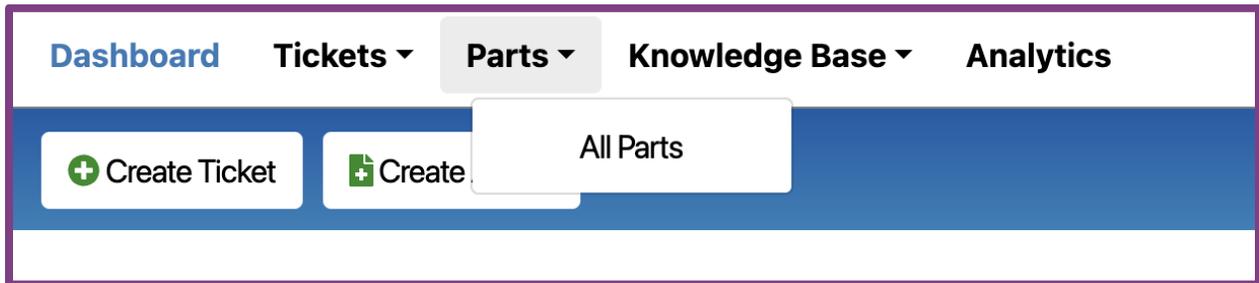
The All Parts page will display the Parts Management grid. This grid will automatically populate with data if your district has previously set up Parts Management in the Asset Management system. The grid provides a comprehensive view of all parts, facilitating efficient tracking and management.

For districts that have already integrated Parts Management within Asset Management, the grid will reflect all parts data from the existing system, ensuring a seamless transition and immediate usability of the feature. If you need a refresher on Parts Management for Asset Management, please review documentation here.

	Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
			Select Part Type	Select Part Area			
+	0P13YF	AC Power Adapter (Dell 11)	Chromebook	Technology	95	34.99	95
+	M1WCF	AC Power Adapter (Dell 13)	Chromebook	Technology	29	29.99	25
+	R-134a	AC Refrigerant 12 oz 301CA	HVAC	Maintenance	22	0.00	0
+	PP99H	Back Cover (Dell 11)	Chromebook	Technology	52	44.99	10
+	LAC220	Battery (Acer)	Chromebook	Technology	32	25.99	30
+	07GDY	Battery (Dell)	Chromebook	Technology	63	58.00	100
+	45N1176	Battery (Lenovo Thinkpad)	Chromebook	Technology	29	39.99	10
+	LA22ZA120	Blower Wheel (Carrier)	HVAC	Maintenance	10	107.58	32
+	85649	Carquest Premium Flow Spin-On	Ipad	Transportation	36	32.99	29
+	4710209006	Defrost Control Board	HVAC	Maintenance	10	163.11	10
+	CRWW1	Dell 11 5190 MOBO 4GB - N3350	Chromebook	Technology	279	215.50	100
+	2511030601	Fortune FDR601 - 225/70R19.5	Bus Tires	Transportation	46	140.00	50

Parts Management Catalog

The Parts Management Grid now boasts in-line editing capabilities, streamlining the process of managing parts within your catalog.

- To add a new record, click "Add Record" at the top of the Parts Management Grid and a new, editable row appears at the top of the grid for immediate data entry.
  - Add records directly within the grid, eliminating the need for navigation to separate pages.
- Click "Save Changes" at the top of the Parts Grid to add the new part to your catalog.
- Click "Cancel Changes" to close and discard any modifications to your catalog.

NOTE: Be aware that any unsaved changes will be lost if you navigate away from the grid, alter filters, or refresh the page. It is highly recommended to save changes frequently to prevent data loss.

Part Number Field:
- Part Number must be a unique identifier.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
		Select Part Type ▼	Select Part Area ▼			
0P13YF		Select Part Type ▼	Select Part Area ▼		0	0
That Part Number is already in use or has been entered more than once.						
+ 0P13YF	AC Power Adapter (Dell 11)	Chromebook	Technology	95	34.99	95

- Part Number can be a duplicate to Product Number as Parts are its own unique Catalog.
- Max character limit is 30 alphanumeric characters and minimum of 3 characters long.

Part Name Field:
- Part Name must be a unique name.
- Part Name can be a duplicate to Product Name as Parts are its own unique Catalog.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
		Select Part Type ▼	Select Part Area ▼			
0P13YFL	AC Power Adapter (Dell 11)	Select Part Type ▼	Select Part Area ▼		0	0
	That Part Name is already in use or has been entered more than once.					

- Max character limit of 30 alphanumeric characters and a minimum of 3 characters long.

Part Type and Part Area Fields:
- Part Type and Part Area are dropdown menus created by users who have access to add and edit Parts.
- To add a new Part Type or Part Area to the dropdown list navigate to Asset Management and manage the list in the Asset Management Parts Catalog.
- Part Type and Part Area fields are searchable, click the name from the dropdown and the grid will filter for your selection.
- To navigate to the next field from the two dropdown fields, you must click on the field - tabbing to move between dropdown fields is not enabled.
- Max character limit of 100 alphanumeric characters.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
		Select Part Type ▼	Maintenance ▼			
+ R-134a	AC Refrigerant 12 oz 301CA	HVAC	Maintenance	22	0.00	0
+ LA22ZA120	Blower Wheel (Carrier)	HVAC	Maintenance	10	107.58	32
+ 4710209006	Defrost Control Board	HVAC	Maintenance	10	163.11	10
+ LA11XA048	Inducer Wheel (Carrier)	HVAC	Maintenance	0	36.22	50
+ B01CSWPVME	MERV 8 Filter 20x20x1	HVAC	Maintenance	15	38.34	40

|◄ ◄ 1 ► ►| 25 ▼ items per page   1 – 5 of 5 items

Quantity Field:
- The Quantity field in the grid is not editable from the Parts grid.
- The Quantity field aggregates all site inventory for that part automatically. Steps to add inventory to sites are described further in this document.
- Field type is integer and the character limit is 5,000,000.

NOTE: When the Quantity number appears in red, it signals that the quantity has dropped below the set Minimum Stock level for that part.

Parts

Add Record   Refresh

	Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
			Select Part Type ▼	Select Part Area ▼			
+	0P13YF	AC Power Adapter (Dell 11)	Chromebook	Technology	**85**	34.99	95
+	M1WCF	AC Power Adapter (Dell 13)	Chromebook	Technology	29	29.99	25
+	R-134a	AC Refrigerant 12 oz 301CA	HVAC	Maintenance	22	0.00	0
+	PP99H	Back Cover (Dell 11)	Chromebook	Technology	52	44.99	10

Cost Field:
- The cost field is optional and not a required entry.
- The field type is decimal, and it does not display the dollar sign ($).
- It can accommodate costs up to $100,000.00 per item.
- The cost field is specific to each item and is not an aggregate value for all parts in inventory.

Minimum Stock Field:
- The minimum stock field is optional and not mandatory.
- It accepts integer values with a maximum limit of 500,000.
- When the Quantity number appears in red, it signals that the part quantity has fallen below the minimum stock level set by the district.

Inventory Tab

Within the Inventory tab, users have the capability to directly edit inventory quantities for different sites. This in-line editing feature allows for convenient adjustments of inventory levels, either adding to or reducing the stock at various locations.

- To view more details about a specific Part, click on the "+" symbol (carrot) located to the left of the Part's row. This action will expand the row to reveal additional information and access to the Inventory tab.

Add Inventory to Sites
- Click "Add Inventory" to view a list of sites to add parts inventory.
- Make sure to check the box so the new site inventory quantity is added for the part.
- Tab or use your mouse to click into the next site quantity box.
- Click "Save" to associate the part to selected sites.
- Sites already assigned to a Part on the Inventory tab will no longer display in the Assign Sites listing.
- Once the Site is added to the Inventory tab, use in-line edit to add or change the Minimum Stock.

NOTE: Parts Management Grid does NOT allow for "Select All" options for Inventory Quantity.

- As an admin or technician, you can add sites without parts inventory quantity, allowing users to add quantity later.

Update Current Inventory

When a part has been used to solve a ticket, a technician will need to update the inventory of the part, at the site it was removed from. The technician will need to navigate to the part used, open the inventory tab, and highlight the site quantity to update.
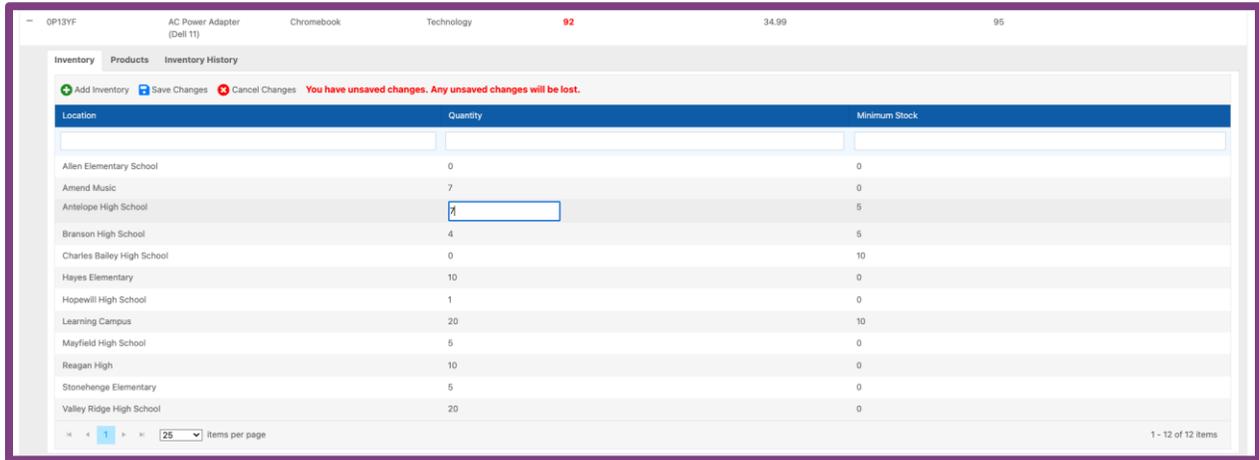
If the technician uses 3 parts from the highlighted 10, the technician will update the quantity to 7. When the quantity has been changed, but not saved, a message will appear to remind the technician to save their changes.

Once the changes have been saved for quantity updates, the Inventory History grid will update. It will show the quantity adjustment, the user who made the change, the date of change, the final quantity, and the source where the change happened, either Help Desk or Asset Management.
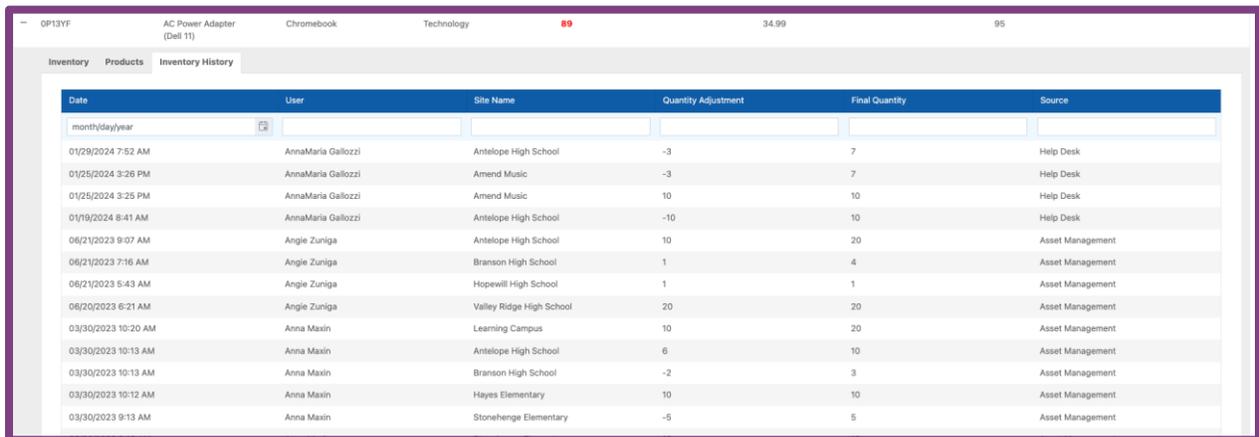

Note: In upcoming releases for 2024:
- The ability to assign a part to a ticket with a cost will be present. By assigning a part to a ticket, the quantity will automatically update from the inventory grid.
- With the ability to assign parts to tickets, there will also be usage reports to watch for trends and needs for ordering.
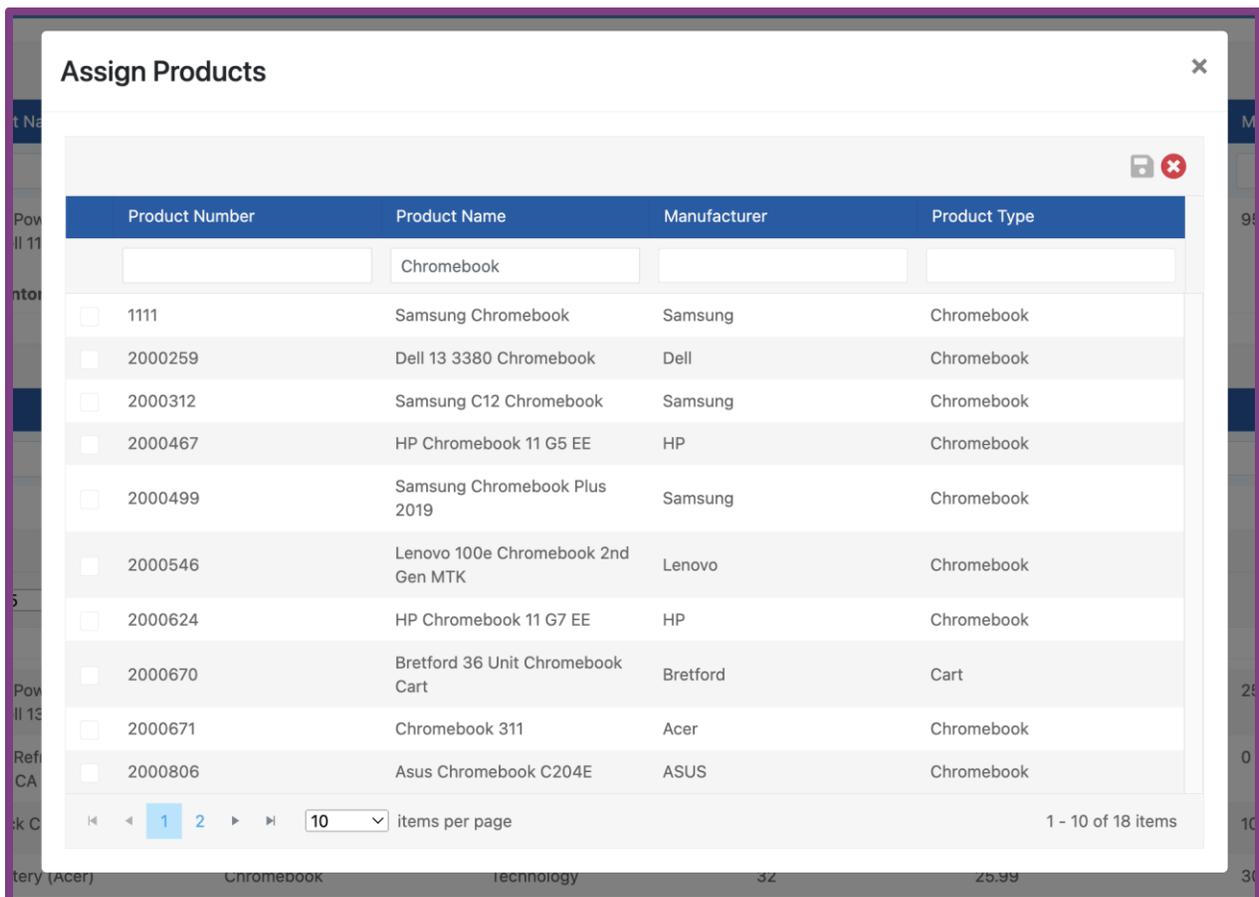
Products Tab
As an admin or technician with permissions, you can assign products to parts. This assignment will allow users to see which products use certain parts.

- To view more details about a specific Part, click on the "+" symbol (carrot) located to the left of the Part's row. This action will expand the row to reveal additional information and access to the Products Tab.
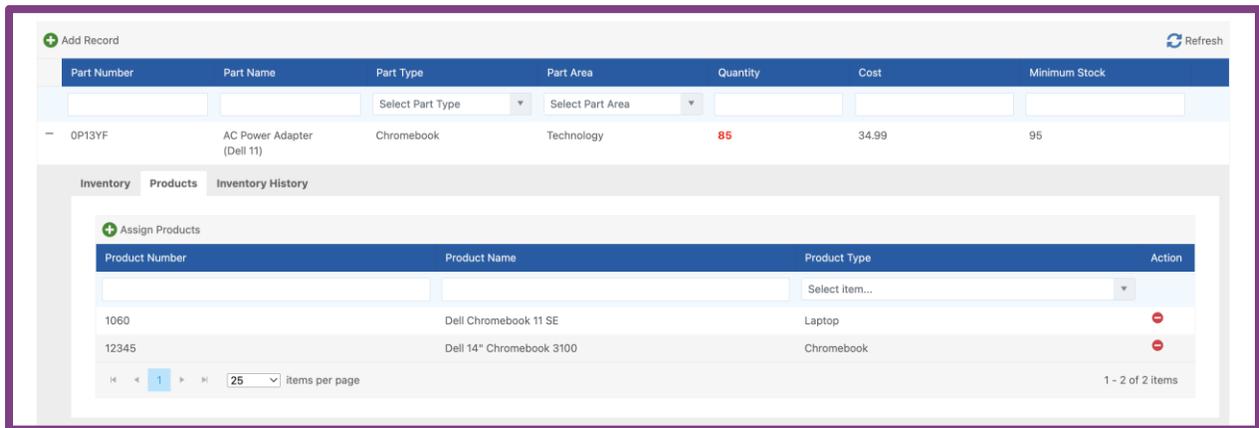
- To initiate product assignment, click on "Assign Products." This action opens a modal, enabling a comprehensive search across the entire Asset Management Product Catalog.
- Utilize the search functionality by product number, product name, manufacturer, or product type to pinpoint specific items.

- When assigning products to a part, simply check the boxes adjacent to the desired products.
- Once selected, a blue checkmark will appear, signifying the chosen products.
- Save your changes to confirm the assignment or click Cancel to reject selections and close the modal.

The inventory history tab logs all adjustments made to the Part's inventory quantity including who made the adjustments, a timestamp of the changes, and the quantity count changes.
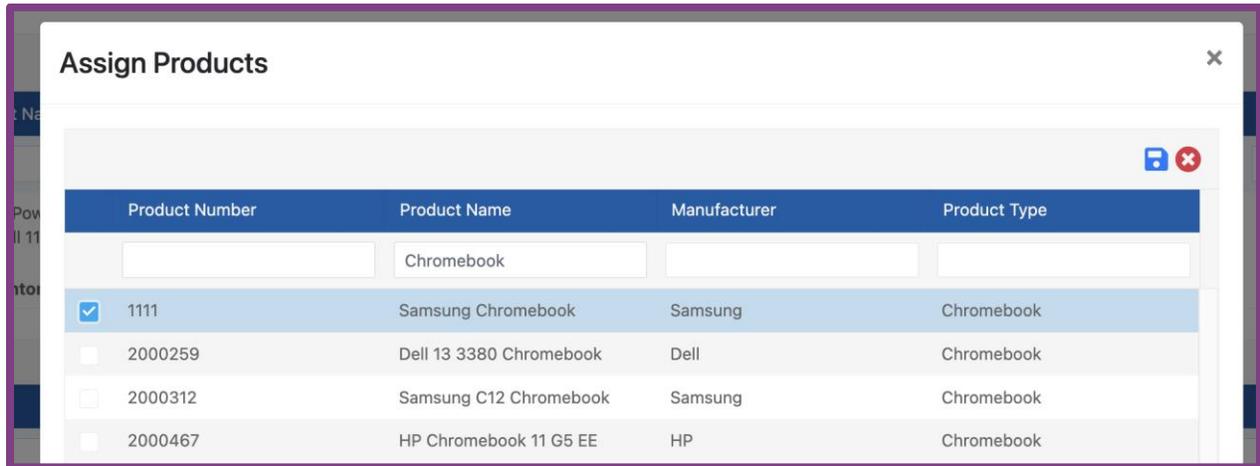
- To view more details about a specific Part, click on the "+" symbol (carrot) located to the left of the Part's row. This action will expand the row to reveal additional information and access to the Inventory History Tab.
- The Inventory History tab displays the Date, User (First and Last Name), Site Name, Quantity Adjustment, and the Final Quantity of the Part.
- Negative adjustments are indicated with a negative (-) sign.
- The source field specified where the change occurred, whether in Help Desk or Asset Management.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
		Select Part Type ▾	Select Part Area ▾			
− 0P13YF	AC Power Adapter (Dell 11)	Chromebook	Technology	**85**	34.99	95

Inventory   Products   **Inventory History**

Date	User	Site Name	Quantity Adjustment	Final Quantity	Source
month/day/year 🗓					
01/19/2024 8:41 AM	AnnaMaria Gallozzi	Antelope High School	-10	10	Help Desk
06/21/2023 9:07 AM	Angie Zuniga	Antelope High School	10	20	Asset Management
06/21/2023 7:16 AM	Angie Zuniga	Branson High School	1	4	Asset Management
06/21/2023 5:43 AM	Angie Zuniga	Hopewill High School	1	1	Asset Management
06/20/2023 6:21 AM	Angie Zuniga	Valley Ridge High School	20	20	Asset Management
03/30/2023 10:20 AM	Anna Maxin	Learning Campus	10	20	Asset Management
03/30/2023 10:13 AM	Anna Maxin	Antelope High School	6	10	Asset Management
03/30/2023 10:13 AM	Anna Maxin	Branson High School	-2	3	Asset Management
03/30/2023 10:12 AM	Anna Maxin	Hayes Elementary	10	10	Asset Management
03/30/2023 9:13 AM	Anna Maxin	Stonehenge Elementary	-5	5	Asset Management

Other Considerations:

- All parts within the system must be entered manually. As of now, there is no functionality to facilitate the bulk creation or import of parts through Excel spreadsheets.
- Search feature does not support special characters. When naming parts or entering relevant information, users should be mindful that special characters will not be recognized in search queries.