(Formerly GetHelp)
Version 8.1 Release Documentation

Frontline Education is happy to announce the release of Help Desk Management version 8.1 which includes the following enhancements:

1. **Enhanced Reporting - Customize Reports in Analytics**

Help Desk Customize Reports

Being able to manipulate data for reporting, add fields, and customize views offers unparalleled flexibility and precision in data analysis. This capability allows you to tailor reports to meet specific business needs, ensuring that critical insights are easily accessible and actionable.

- By adding fields, you can incorporate additional data points that provide a more comprehensive understanding of your operations.
- Customizing views enhances the clarity and relevance of the information presented, enabling stakeholders to focus on the most pertinent data.

Overall, these features empower you to make more informed decisions, drive efficiency, and adapt quickly to changing business requirements.

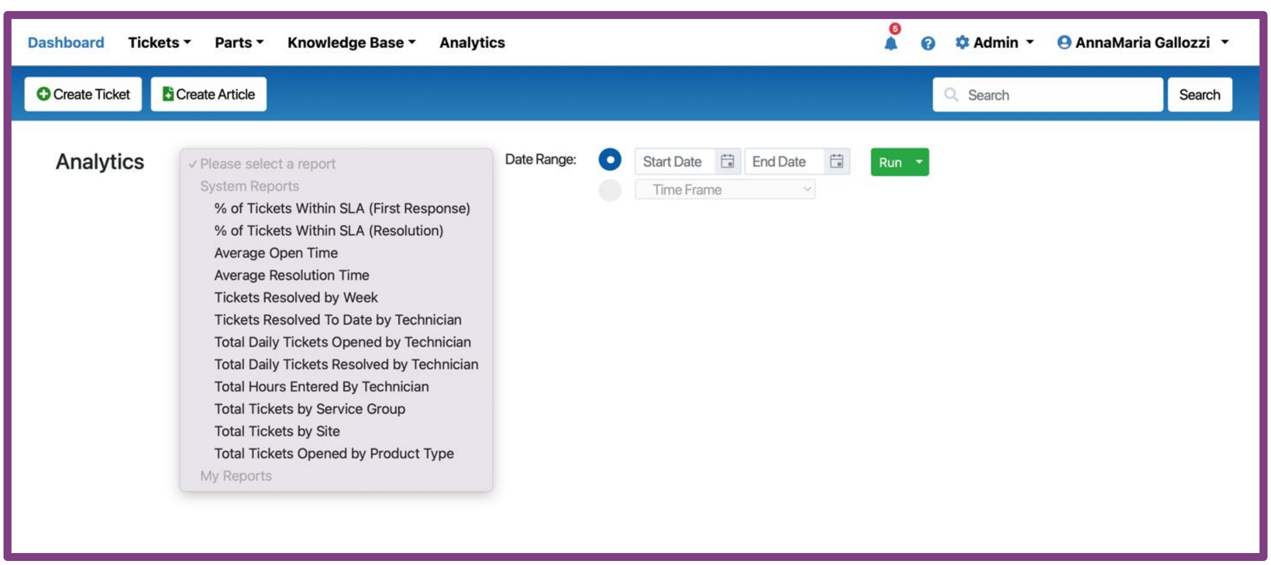
Help Desk Analytics Overview

Help Desk Analytics offers customers the ability to track and report on metrics important to the district. Help Desk currently offers 12 canned reports for admin/technicians:

1. **% of tickets within SLA (First Response) -** This report shows the percentage of tickets where the initial response from support was provided within the defined SLA, indicating the team's responsiveness. It helps gauge the efficiency of your team in acknowledging customer concerns promptly, ensuring a positive customer experience.
2. **% of tickets within SLA (Resolution) -** This report indicates the percentage of tickets that were resolved within the SLA timeframe, reflecting the team's ability to meet service level agreements. It measures the team's effectiveness in resolving issues within the expected timeframe, indicating operational efficiency and customer satisfaction.
3. **Average Open Time -** This metric calculates the average duration that tickets remain open before being resolved or closed, helping identify areas for improved efficiency. It provides insight into the average duration tickets remain unresolved, helping identify bottlenecks and improve response times.
4. **Average Resolution Time -** This report calculates the average time taken to resolve tickets, providing insights into the team's efficiency and performance. It shows the average time taken

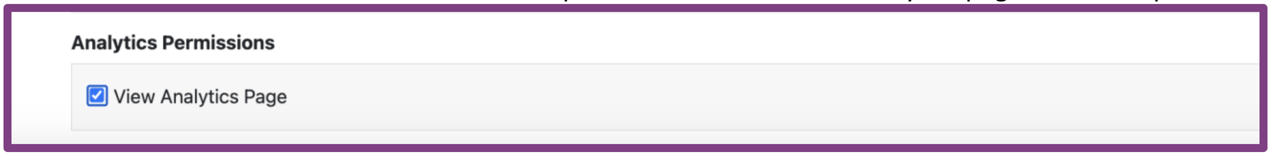
to resolve tickets, aiding in setting realistic expectations for issue resolution and improving overall service levels.

5. **Tickets Resolved by Week -** This report presents the number of tickets resolved each week, allowing for trend analysis and workload planning. It offers a weekly overview of ticket resolutions, helping track team productivity and identify trends over time.
6. **Tickets Resolved to Date by Technician -** This report shows the total number of tickets resolved by each technician, helping to measure individual performance and workload. It tracks individual technicians' performance in resolving tickets, enabling targeted training and resource allocation.
7. **Total Daily Tickets Opened by Technician -** This report details the number of tickets opened by each technician on a daily basis, aiding in workload management. It provides a daily breakdown of tickets opened by each technician, aiding in workload distribution and resource planning.
8. **Total Daily Tickets Resolved by Technician -** This report shows the number of tickets resolved by each technician daily, providing insights into individual productivity. It offers insights into individual technicians' performance and efficiency.
9. **Total Hours Entered by Technician -** This report tracks the total hours spent by each technician on ticket resolution, aiding in resource allocation and performance evaluation. It tracks the hours spent by each technician on ticket resolution, aiding in resource management and project planning.
10. **Total Tickets by Service Group -** This report categorizes tickets by service group, providing insights into which areas of support are experiencing the highest volume. It categorizes tickets by service group, helping identify areas of high demand or recurring issues for targeted improvement efforts.
11. **Total Tickets by Site -** This report categorizes tickets by site or location, helping to identify patterns and trends specific to each site. It categorizes tickets by site, enabling site-specific performance analysis and resource allocation.
12. **Total Tickets Opened by Product Type -** This report categorizes tickets by the type of product or service, enabling analysis of common issues and areas for product improvement. It categorizes tickets by product type, aiding in identifying common issues and prioritizing product improvements.



User Management: Roles

Admins have permissions to view and pull reports from the Analytics page.
Admins can determine which technicians have permissions to view the Analytics page and run reports.



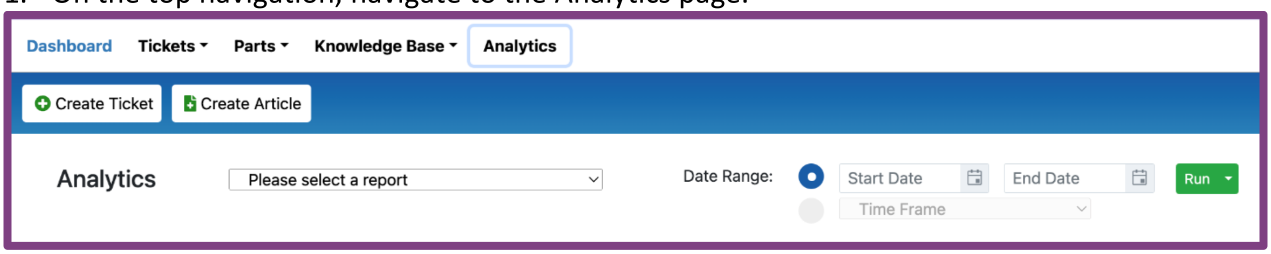
Steps to Edit Permissions for Analytics in User Roles:

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

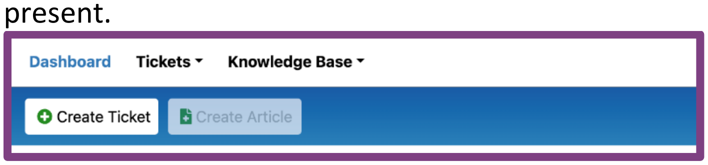
NOTE: The Default Service Technician Role now includes Analytics permissions by default. For pre-existing roles, administrative action is suggested to enable Analytics Permissions.

Analytics

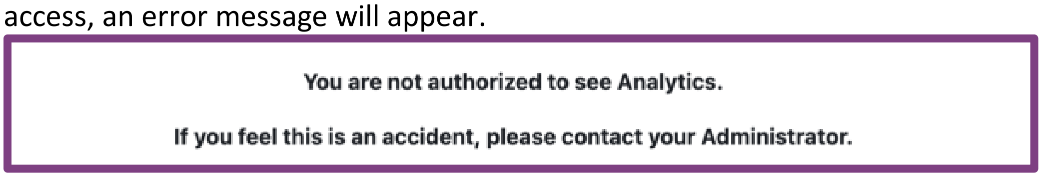
1. On the top navigation, navigate to the Analytics page.



Note: If the user does not have permissions to view Analytics, the Analytics button will not be present.



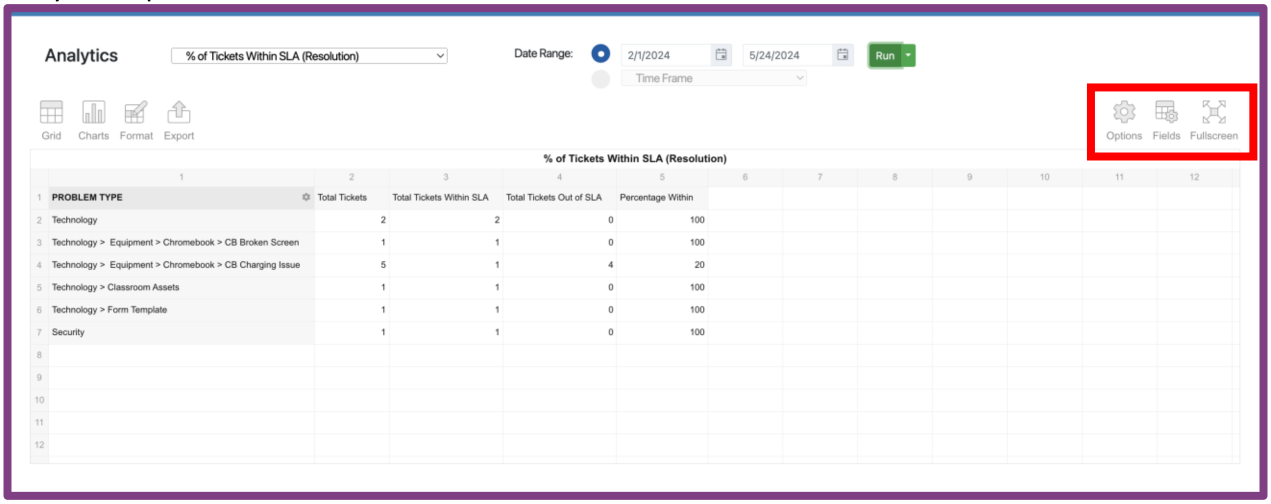
Note: If a restricted user receives a link to a report of the Analytics page and does not have access, an error message will appear.



2. Once successfully on the Analytics page, you can run the 12 canned reports the same way as before. Simply choose from the drop-down of reports, create a custom date range or choose a predefined time frame.

3. Once Date Range/Time Frame options have been selected, click the Run button and your report will display on the page. For more information about how to run a canned report, please review this [Learning Center Article.]()

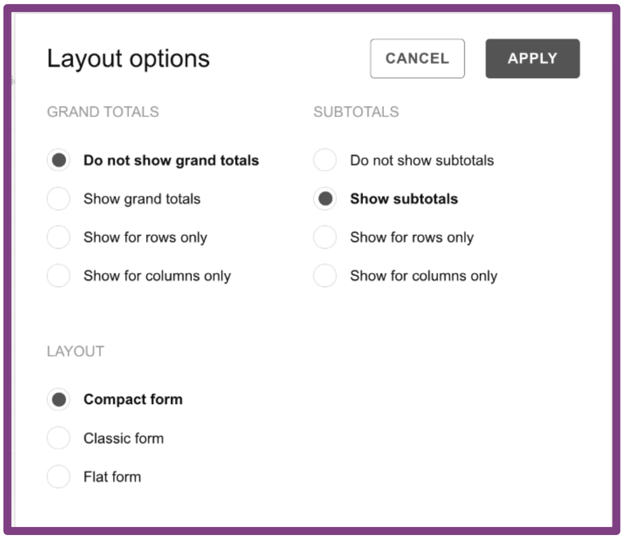
4. With a report now displayed on the page, there will be 3 new icons on the right side above your report.



PROBLEM TYPE	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within
Technology	2	2	0	100
Technology > Equipment > Chromebook > CB Broken Screen	1	1	0	100
Technology > Equipment > Chromebook > CB Charging Issue	5	1	4	20
Technology > Classroom Assets	1	1	0	100
Technology > Form Template	1	1	0	100
Security	1	1	0	100

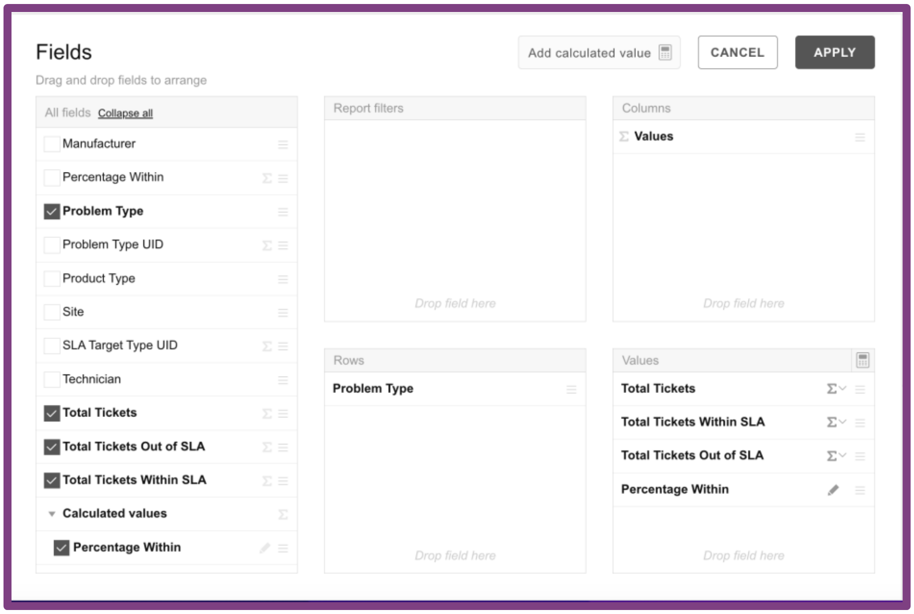
   a. **Options (gear icon) -** customize layout options for the grid report
      - **Grand Totals:**
         - Do Not Show Grand Totals - This option hides the grand totals for the entire dataset.
         - Show Grand Totals - This option displays the grand totals for both rows and columns.
         - Show for Rows Only - This option shows the grand totals only for rows.
         - Show for Columns Only - This option shows the grand totals only for columns.
      - **Subtotals:**
         - Do Not Show Subtotals - This option displays subtotals for grouped data in both rows and columns.
         - Show Subtotals - This option displays subtotals for grouped data in both rows and columns.
         - Show for Rows Only - This option shows subtotals only for grouped rows, not for columns.
         - Show for Columns - This option shows subtotals only for grouped columns, not for rows.
      - **Layout:**

- Compact Form - A space-efficient layout where data is displayed in a condensed manner.
- Classic Form - A traditional layout that presents data in a familiar tabular format.
- Flat Form - A layout where data is presented in a flat, ungrouped manner.



b. **Fields (table icon) -** customize fields for the grid report

By configuring these sections, you can create a detailed and customizable view of your data, allowing for better analysis and understanding of the underlying patterns and trends. The fields on the left can be dragged to the quadrants on the right. They can be re-arranged, and different values can be calculated.



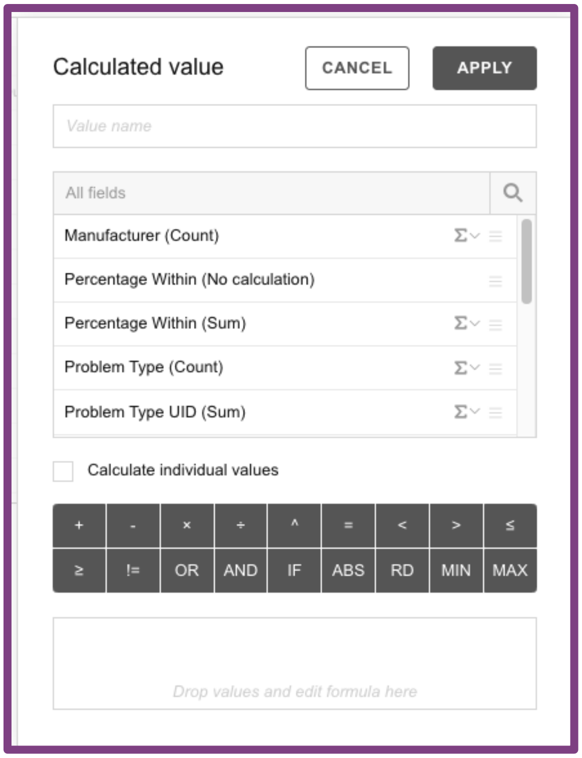
- **Rows:**
  - The "Rows" section determines how the data is grouped horizontally in your chart or table. Each unique value in the fields you place here will be represented as a separate row.
  - Example: If you place "Week Of" in the Rows section, each row in the table will represent a different week.
- **Columns:**
  - The "Columns" section determines how the data is grouped vertically in your chart or table. Each unique value in the fields you place here will be represented as a separate column.
  - Example: If you place "Technician" in the Columns section, each column will represent a different person or entity who resolved the issues.
- **Values:**
  - The "Values" section is used to specify what data is being measured or calculated. This section typically contains numeric data that you want to aggregate, such as sums, averages, counts, etc.
  - Example: If you place "Resolutions" in the Values section and choose to sum them, you will get the total number of resolutions for each combination of rows and columns.
- **Report Filters:**
  - The "Report Filters" section allows you to filter the entire dataset based on certain criteria. The fields placed here can be used to refine the data displayed in the chart or table by excluding or including certain values.
  - Example: If you place "Manufacturer" in the Report Filters section, you can filter the chart to show data for specific manufacturers only.

The Additional Fields that can be modified in this section are:

- Site - Each ticket can have a site associated to it, allowing technicians and admins to look at ticket trends across sites.
- Product Type - is a field that comes over from Asset Management when a tag is associated to a ticket, allowing technicians and admins to track inventory ticket trends
- Manufacture - is a field that comes over from Asset Management when a tag is associated to a ticket, allowing technicians and admins to track inventory ticket trends
- Technician – the heart and soul of the help desk system, technicians are tracked and measured by their KPI's
- Problem Type - customizable fields that can help show trends of needs as tickets come in.
- Service Group - the ability to track what service group tickets are doing and how they are performing.

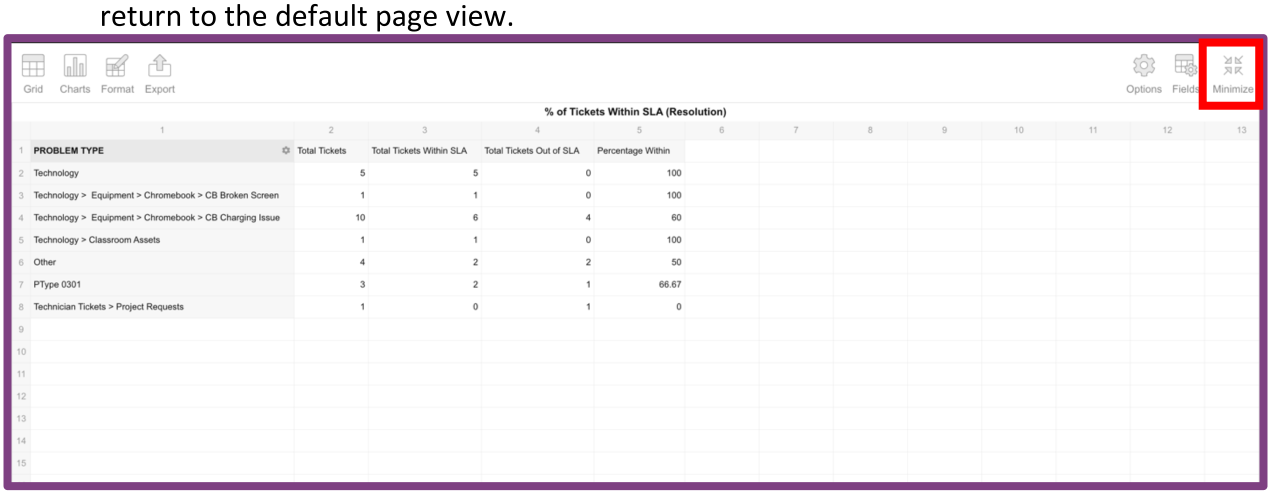
  NOTE: Service Group Fields are only able to be added on Total Tickets by Service Groups canned reports. This report will allow you to manipulate all the data but other reports do not support the Service Group fields.

c. **Calculated Value-** The "Calculated Value" feature allows you to create custom metrics by applying mathematical and logical operations to your data fields. This enables a deeper analysis by generating specific insights tailored to your needs, such as combining, comparing, or transforming existing data points. Utilizing calculated values enhances your reporting capabilities, providing more precise and meaningful metrics for informed decision-making.

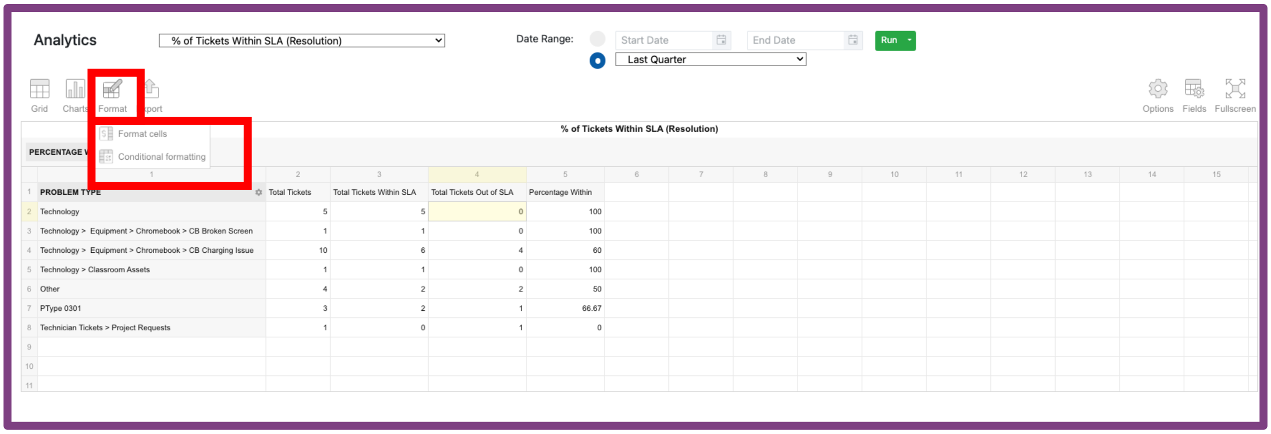


d. **Full Screen -** enlarge your report to cover your full desktop screen.

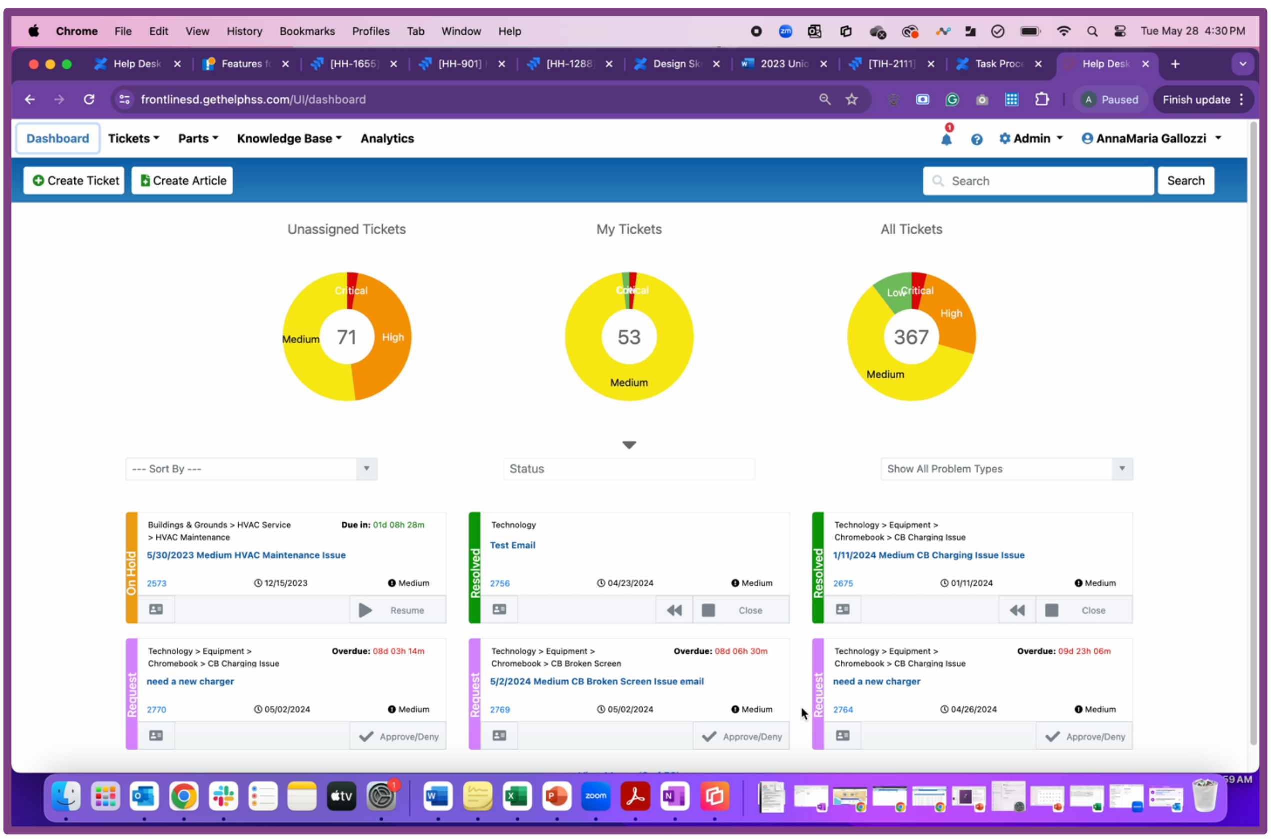
When the report is in full screen, the right corner will then show a minimize button to return to the default page view.



e. **Format** - format has been moved from the right side to the left side of the analytics screen. The same conditional formatting and cell formatting is available.



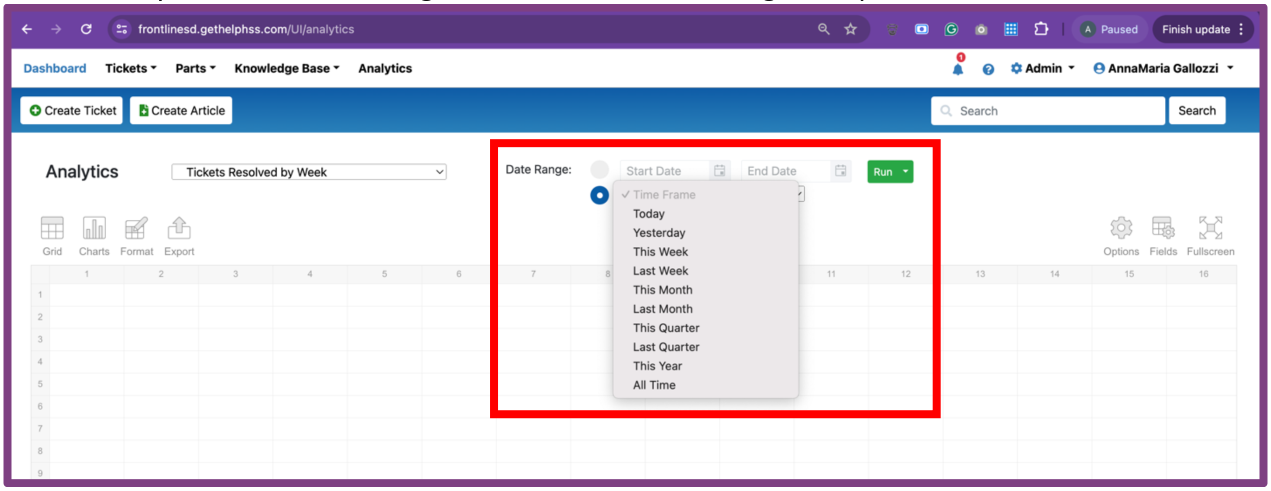
Building & Saving a New Report



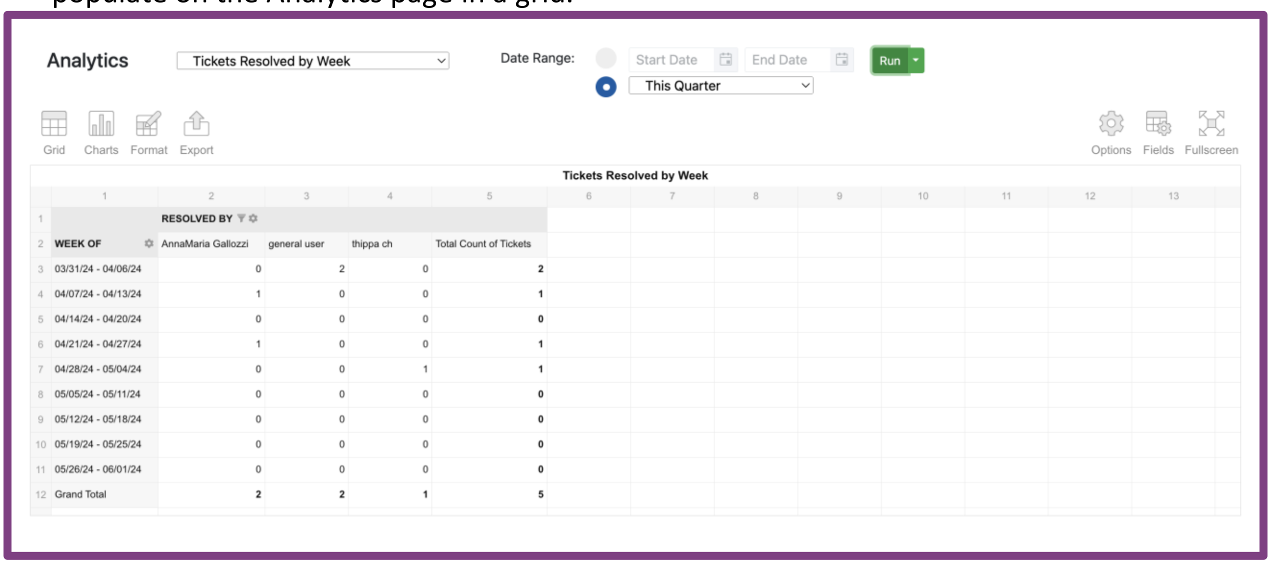
The video above shows the steps for how to build and save a new report.

1. From the Analytics page, choose the canned report that is most aligned with your reporting needs.

2. Choose your timeframe using either a custom date range or a predetermined timeframe.

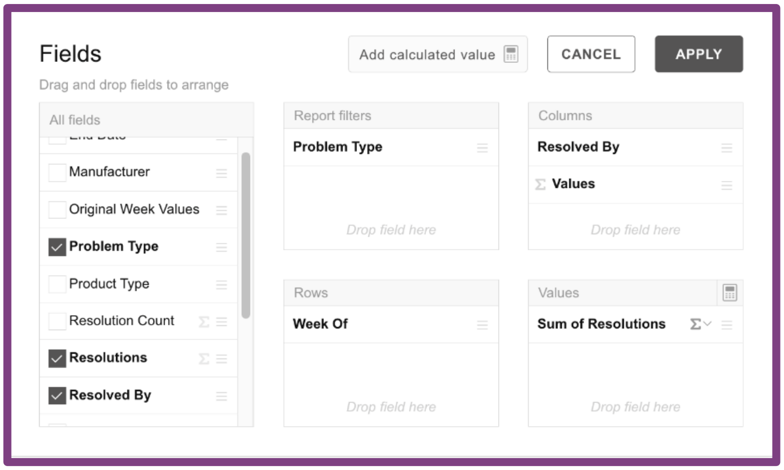


3. After the date range is selected, click the green “Run” button. The canned report will populate on the Analytics page in a grid.

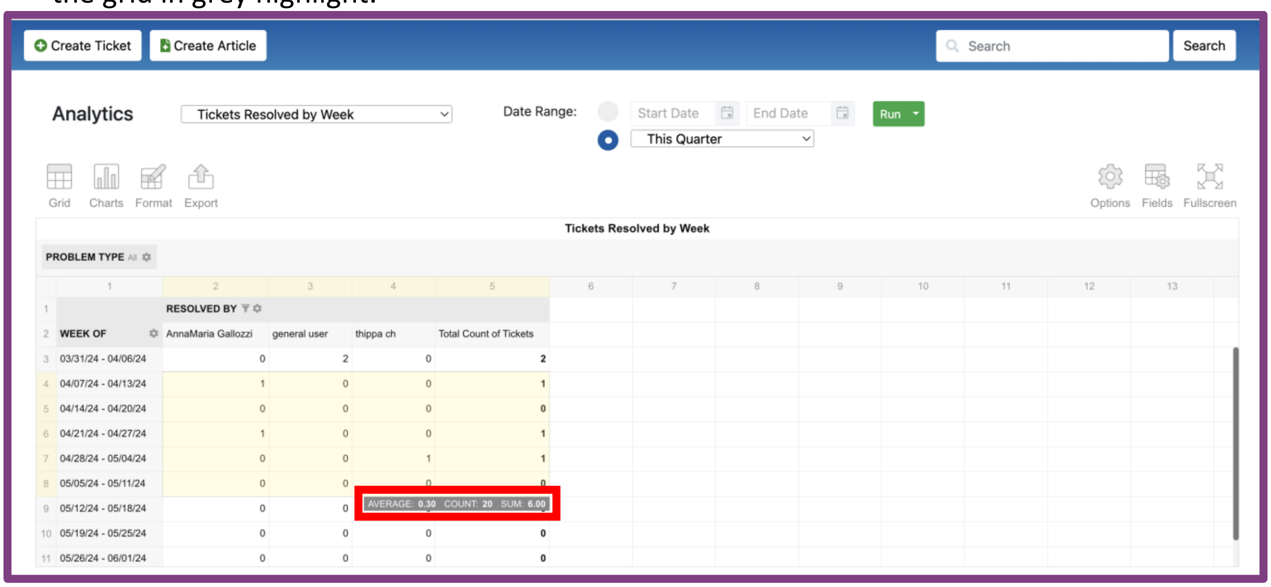


	RESOLVED BY			
WEEK OF	AnnaMaria Gallozzi	general user	thippa ch	Total Count of Tickets
03/31/24 - 04/06/24	0	2	0	2
04/07/24 - 04/13/24	1	0	0	1
04/14/24 - 04/20/24	0	0	0	0
04/21/24 - 04/27/24	1	0	0	1
04/28/24 - 05/04/24	0	0	1	1
05/05/24 - 05/11/24	0	0	0	0
05/12/24 - 05/18/24	0	0	0	0
05/19/24 - 05/25/24	0	0	0	0
05/26/24 - 06/01/24	0	0	0	0
Grand Total	2	2	1	5

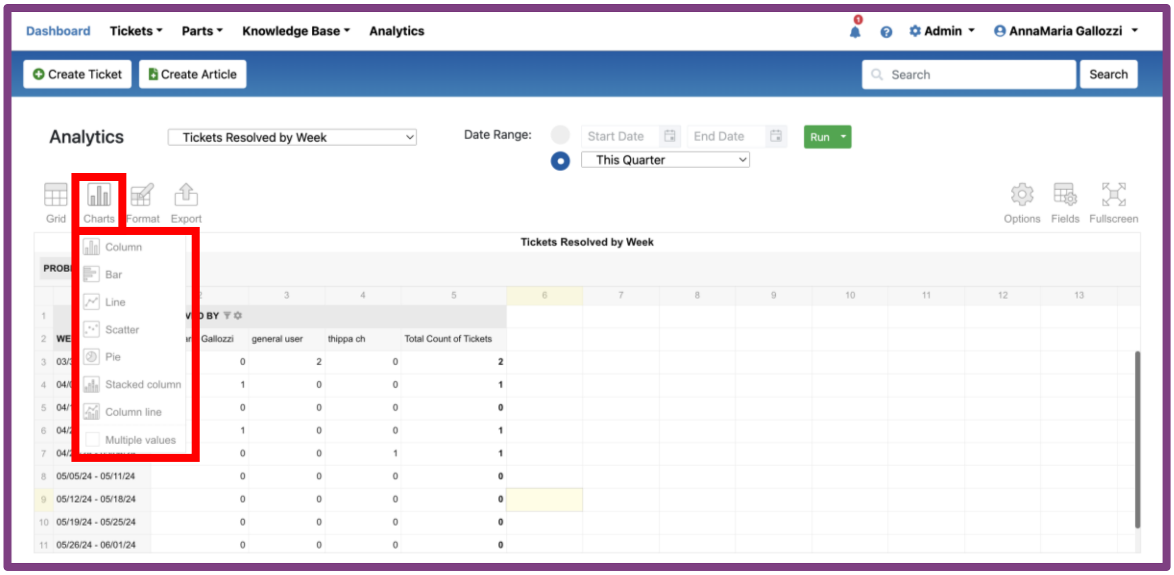
4. Modify and choose additional fields for your report by clicking the new Fields button on the top right of your report.



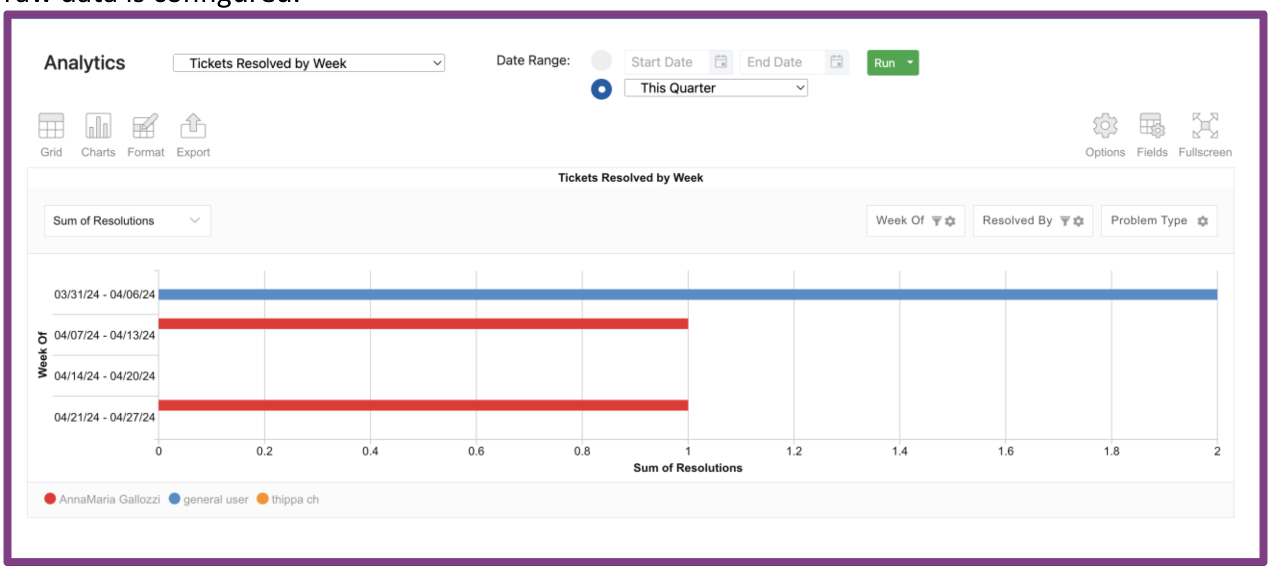
5. Once the fields are applied, the report will update on the page. In the grid, you can also highlight fields you want summed, averaged, or counted which will show at the bottom of the grid in grey highlight.



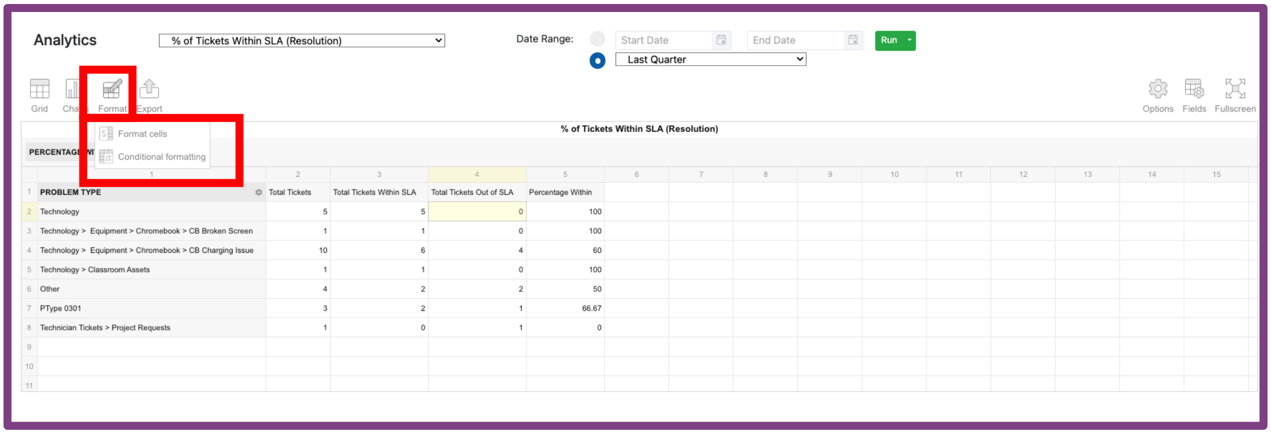
6. When the report is set as you want, you will have the option to see the data in a different chart type by clicking the Charts button at the top left of your report.
   - Column
   - Bar
   - Line
   - Scatter
   - Pie
   - Stacked Column
   - Column Line



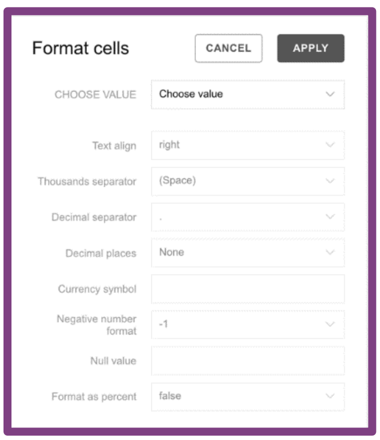
Below is an example of the bar chart option, showing how dynamic a report can be after the raw data is configured.

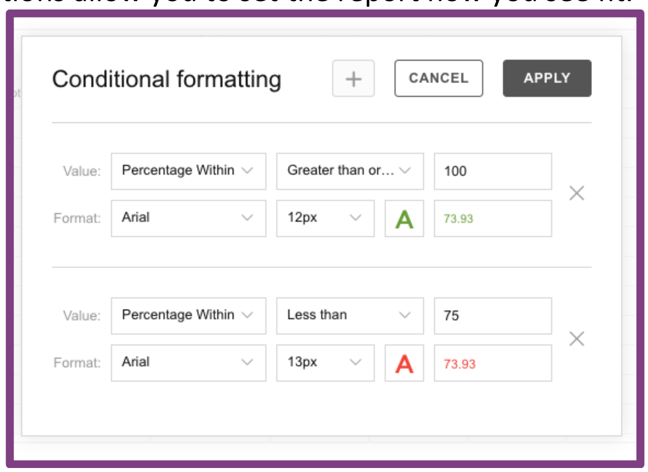


You can take the data a step further by using conditional formatting, click on Format to see options, to set values and format text sizes/fonts. Formatting cells can provide you with the ability to set the data set up with special requirements.

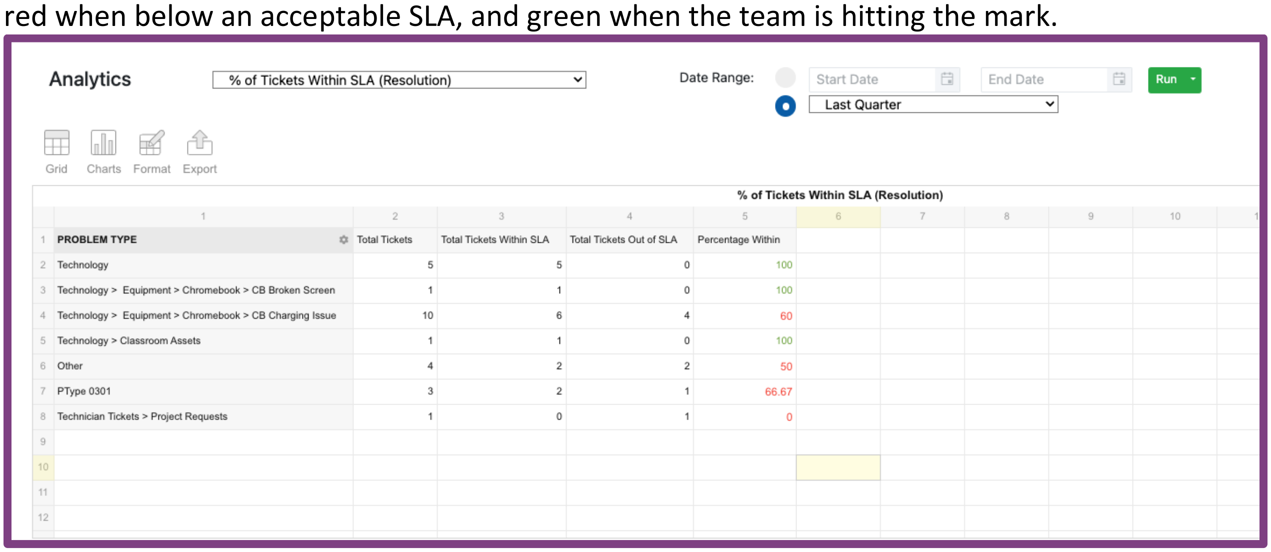


Your options to change formatting is shown below, whether you want to change cells or add conditional formatting, our options allow you to set the report how you see fit.





Based on the conditional formatting applied above, you can see my SLA targets are highlighted red when below an acceptable SLA, and green when the team is hitting the mark.

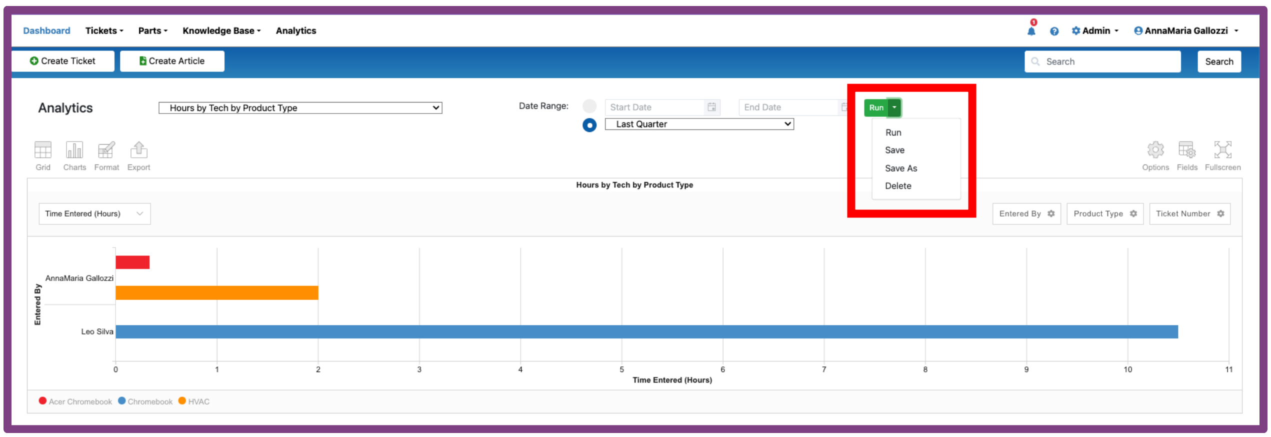


NOTE: When a report has conditional formatting, it can be saved with the formatting.

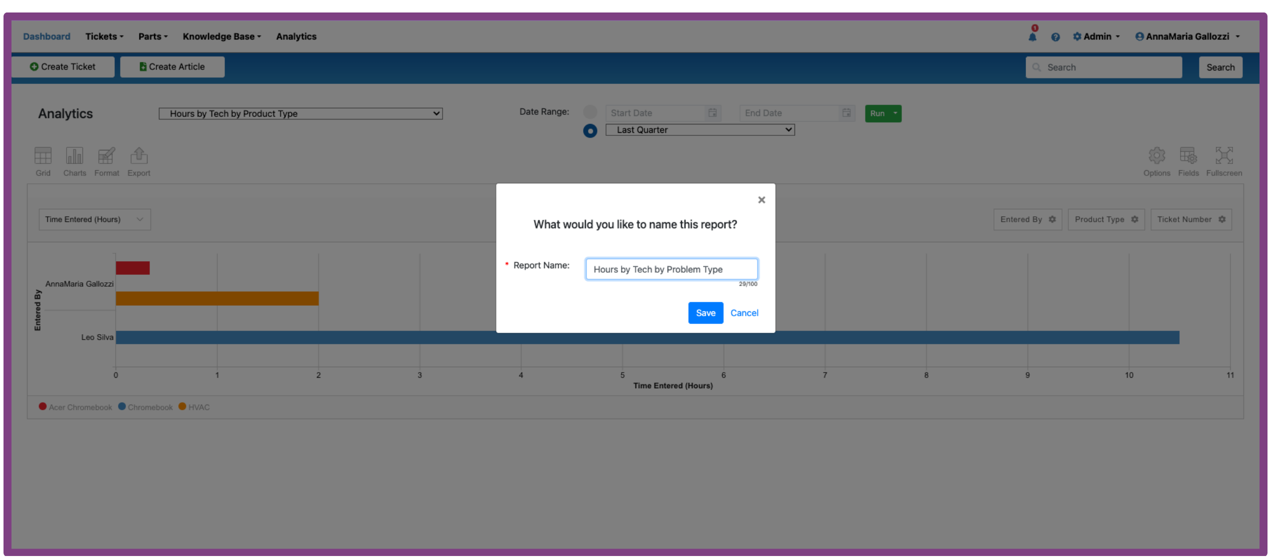
Saving a Report

After running and manipulating a report as an admin or a technician, you can save the report by clicking the green arrow next to the run button. To Save a new report, click “Save As”, to save edits to an existing report click “Save,” and to delete a previously saved report click “Delete.”

NOTE: All reports can be saved, and if you do not save a report, the filters/fields you have added will not be saved. Saving a report is the only way to ensure your edits are visible the next time you run the report.

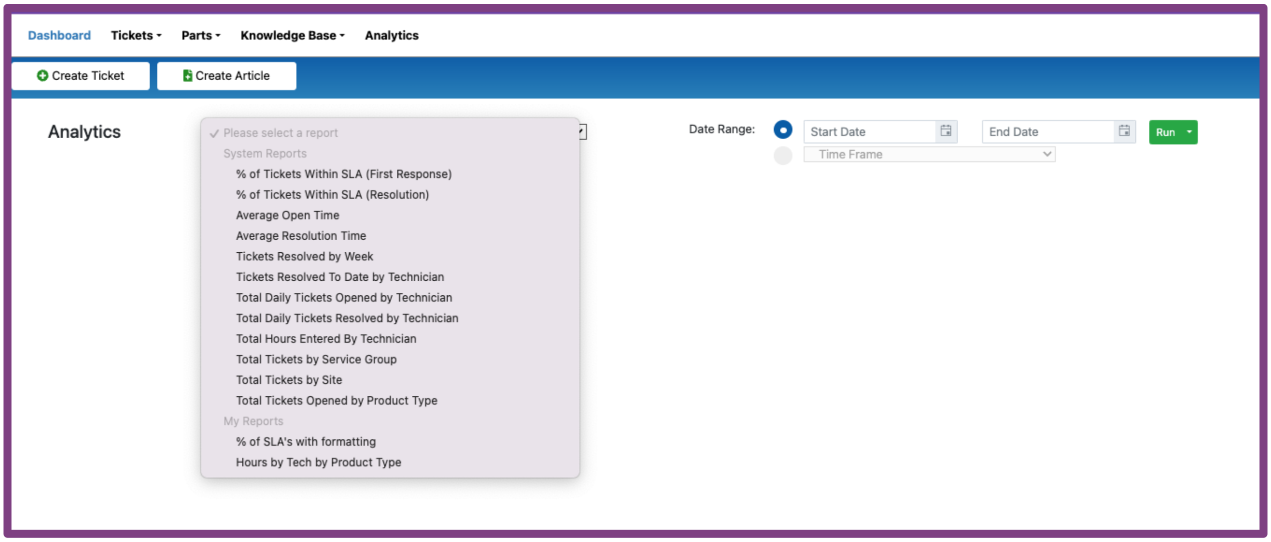


When clicking “Save As”, the pop-up below will prompt you to name the report you are working on by saying “What would you like to name this report?”. You have an open text field to name the report up to 100 characters (including spaces).



When the report is saved, you can find it under “My Reports” in the “Please select a report” drop-down.

Note: Only YOU can see the reports you save under my reports. Reports that you build cannot be shared natively in Help Desk, but you can export the report to share.

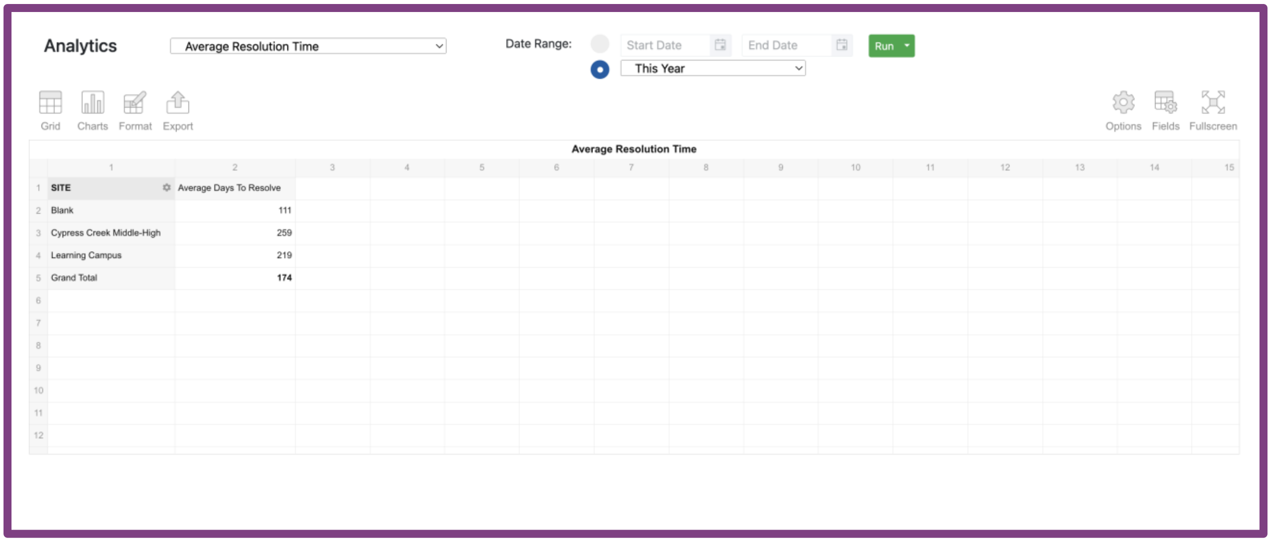


Examples of Useful Reports YOU Can Build

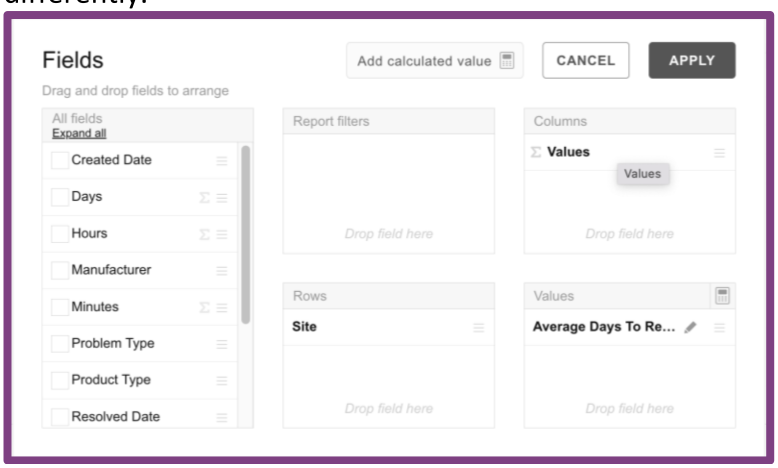
1. Resolution Time By Campus

Tracking Resolution Time by Campus for technicians enables precise identification of performance gaps and resource needs, ensuring consistent service quality across all locations. This data-driven approach enhances accountability and supports proactive issue management. By leveraging these insights, districts can optimize operational efficiency and maintain high standards of technical support.

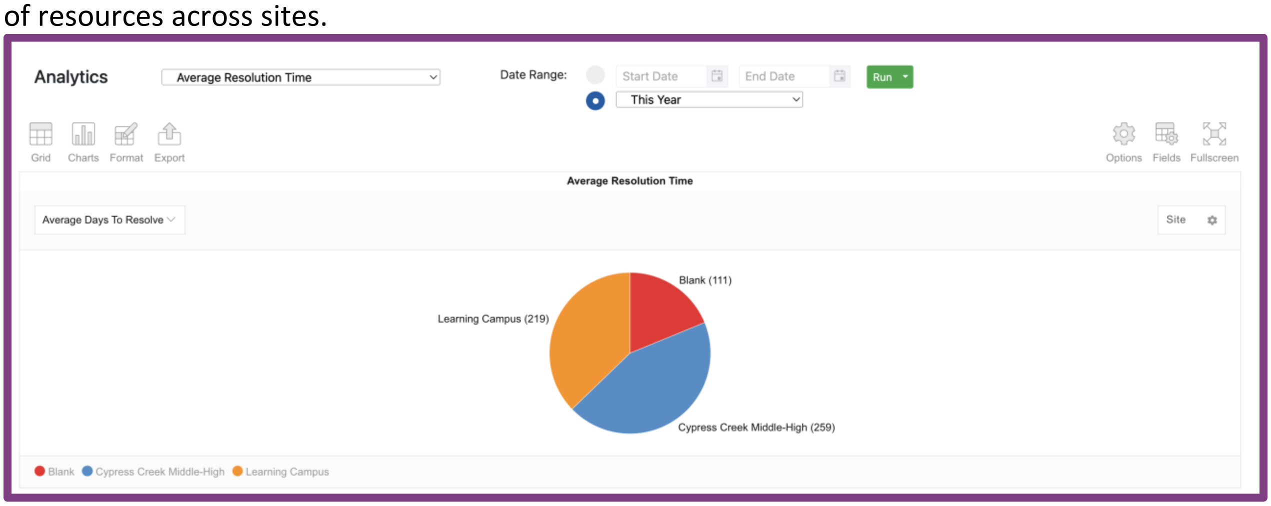
Scenario: As an admin, I want to generate a report showing resolution time for tickets by campus, so that I can assess the efficiency of support services for each campus.



By adding the site field to the rows, I am able to see how each sites tickets are closed differently.



You can also change the Format view of this data to a pie chart, for example, to see the equity of resources across sites.

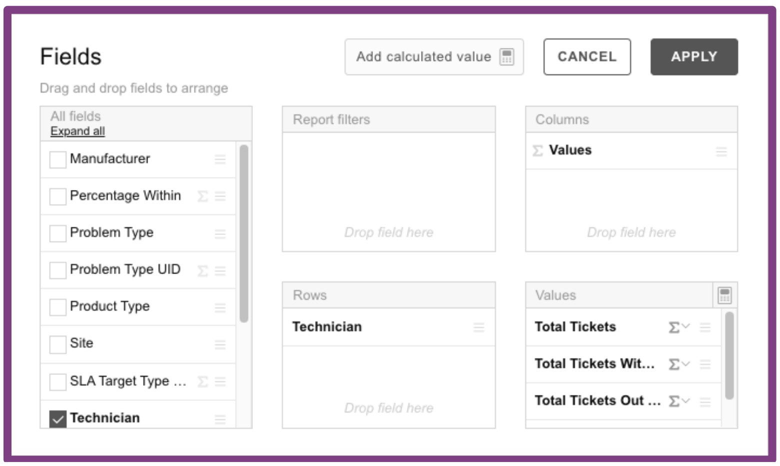


2. SLA time to respond by technician

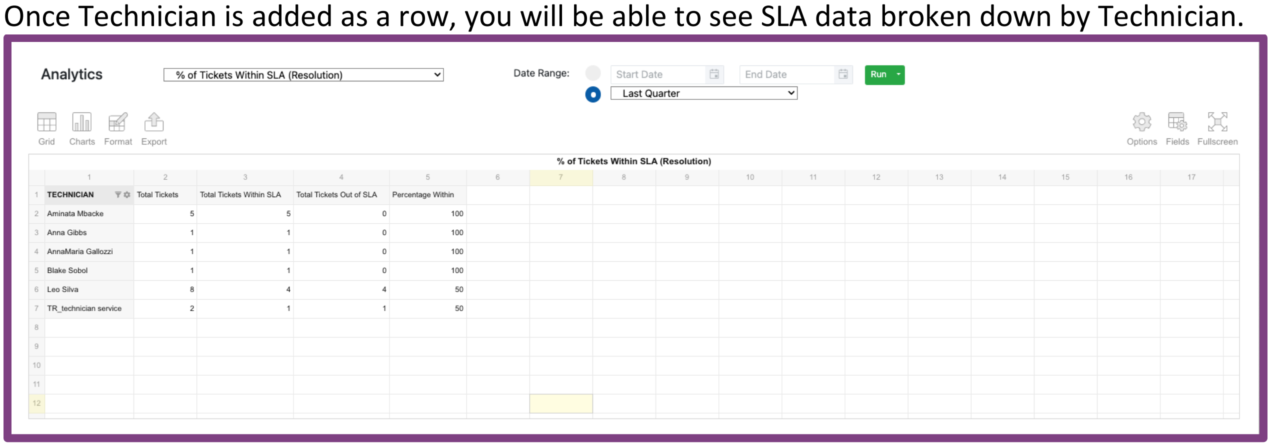
The SLA time to respond by technician report tracks the response time for each technician against the defined SLA. This report helps ensure individual accountability and highlights areas where specific technicians may need additional training or support to improve their response times. It ultimately aids in maintaining high service standards and enhancing overall customer satisfaction.

Scenario: As an Admin, I want to see if my technicians are upholding the SLA's we have in place. In order to that, you can use the following steps:

Remove the Problem Type field (if you want, you can also get some interesting data having both Problem Type and Technician in the report) and set your values and columns how you see fit.

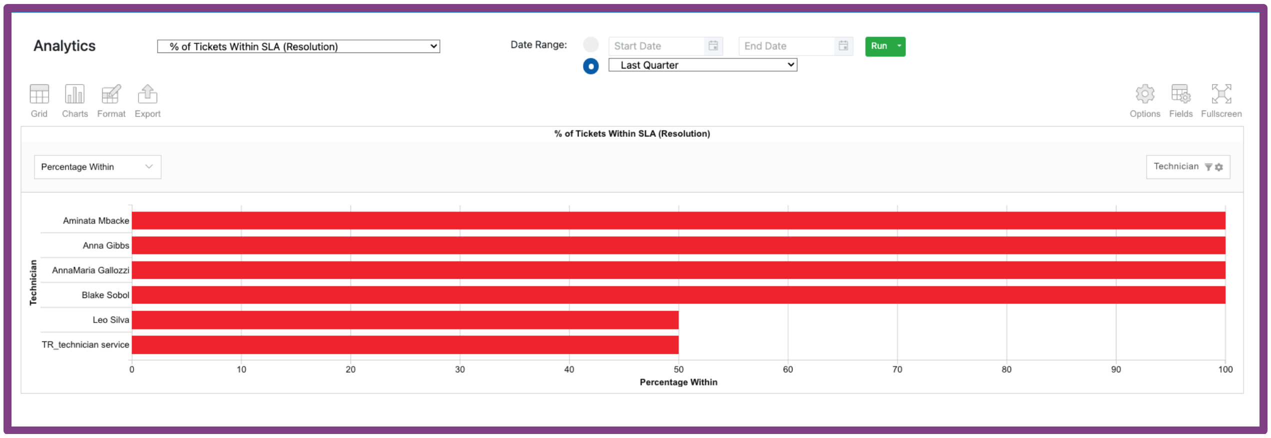


Once Technician is added as a row, you will be able to see SLA data broken down by Technician.



TECHNICIAN	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within
Aminata Mbacke	5	5	0	100
Anna Gibbs	1	1	0	100
AnnaMaria Gallozzi	1	1	0	100
Blake Sobol	1	1	0	100
Leo Silva	8	4	4	50
TR_technician service	2	1	1	50

From there, you can manipulate the data into a more user-friendly view for presentations. You can also change the Format view of this data to Bar, for example.


Analytics
% of Tickets Within SLA (Resolution)
Date Range:
Start Date
End Date
Run
Last Quarter
Grid
Charts
Format
Export
Options
Fields
Fullscreen
% of Tickets Within SLA (Resolution)
Percentage Within
Technician
Aminata Mbacke
Anna Gibbs
AnnaMaria Gallozzi
Blake Sobol
Leo Silva
TR_technician service
0
10
20
30
40
50
60
70
80
90
100
Percentage Within