



(Formerly GetHelp)  
Version 9.3 Release Documentation

Frontline Education is happy to announce the release Help Desk Management v 9.3 which includes the following enhancements:

1. **List Filter (All Tickets Grid)**
  - **List: Tickets I'm in a Service Group for**
2. **Custom Reporting**
  - **Actions: Delete & Share Reports**
  - **Shared Reports**
    - **Share Reports Tab/Grid**
    - **Email Notifications**

This document outlines key capabilities, setup information, feature scope, and usage tips to help users understand and use this functionality effectively.

## 1. List Filter (All Tickets Grid)

To enhance navigation and ticket visibility, **version 9.2** introduced a new **List** filter at the top of the "Tickets" grid. This drop-down allows users to quickly filter the grid based on specific ticket relationships, starting with two options: **List: None** (the default view) and **List: Tickets I Submitted**.

Now in **version 9.3**, we've expanded that functionality with a new filter option: **Tickets I'm in a Service Group For**.

The **Tickets I'm in a Service Group For** option displays only those tickets assigned to one or more **Service Groups** you are a member of—regardless of whether you're the submitter, assignee, or follower. Currently site and problem type restrictions will apply.

This view provides visibility into all tickets tied to your service group's workload and supports team-based collaboration and triage.

### Accessing the Enhanced List Filter

1. Navigate to **Tickets > All Tickets** from the top menu.
2. In the "Tickets" grid, locate the new **List** drop-down next to the "View: Active Tickets" filter at the top of the grid.
  - Before applying any list-based filters, users will see the "Tickets" grid in its default state: "List: None." This option ensures a full, unrestricted view of tickets based on your role-based permissions and any custom filters you apply.
3. Use this drop-down to filter tickets by: **Tickets I'm in a Service Group For** (only the tickets associated with your assigned Service Groups).

**Tickets**

VIEW: Active Tickets

Filter: List: None  
List: Tickets I Submitted  
List: Tickets I'm in a Service Group For

Ticket Number	Problem Type	Site	Status	Submitted By	Tag Number	Scheduled Date	Priority	Summary
2814	Cleaning	Learning Campus	Open	AnnaMaria Gallozzi		monthly/dayly...	Medium	bathroom messy
2813	Cleaning	Learning Campus	Open	AnnaMaria Gallozzi			Medium	bathroom messy
2812	Classroom Assets	Learning Campus	Request Approval	Leo Lion			High	display is cracked
2811	New Employee	Technology Warehouse	New	Ag Gallozzi			Medium	Help onboard new tech
2810	CB Keyboard Issue	Learning Campus	Request Approval	Ag Gallozzi	987654		Medium	K Key is sticking
2809	CB Broken Screen	Learning Campus	Request Approval	Ag Gallozzi	987789		Medium	broken screen help
2808	Technology Purchase	Learning Campus	New	AnnaMaria Gallozzi			Medium	Need New Keyboard
2807	Pest Control	Technology Warehouse	New	AnnaMaria Gallozzi			Medium	Ants in the tech warehouse

**Note:** List views are only present on the All Tickets Grid, not the Unassigned or My Tickets pages.

When **Tickets I'm in a Service Group For** is selected:

- The grid displays tickets with at least one Service Group you belong to as a Service Technician or Service Admin.
- You can apply additional filters (e.g., **Status, Priority, Assigned To**) to further refine your view.
- The grid retains its current sort order, column layout, and filters while you remain on the page.

**Note:** If you want to see the service groups on the grid, manually add the service group column to your grid from the Filter button on the top left of the grid.

**Tickets**

VIEW: Active Tickets

Filter: List: Tickets I'm in a Service Gr...

Ticket Number	Problem Type	Site	Status	Submitted By	Service Groups	Summary	Scheduled Date	Priority	Tag Number
2812	Classroom Assets	Learning Campus	Request Approval	Leo Lion	Principals and AP, Technology Tickets	display is cracked		High	
2786	New Teacher	Learning Campus	Open	Leo Silva	Human Resources, Principals and AP	Maria Jones		High	
2768	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	007007
2767	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	LOGITECH01
2766	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	007007
2762	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	007007
2759	Paper Jam	Learning Campus	New	Mario Torres	Coaches, Principals and AP, TECH - Critical Network, Technology Tickets	Paper is stuck		Medium	

- **Works with other filters:** You can apply additional column filters such as Status, Assigned To, or Priority to further filter the results. When you open the filters flyout, you can reset all filters or add more.

**Tickets**

VIEW: Active Tickets

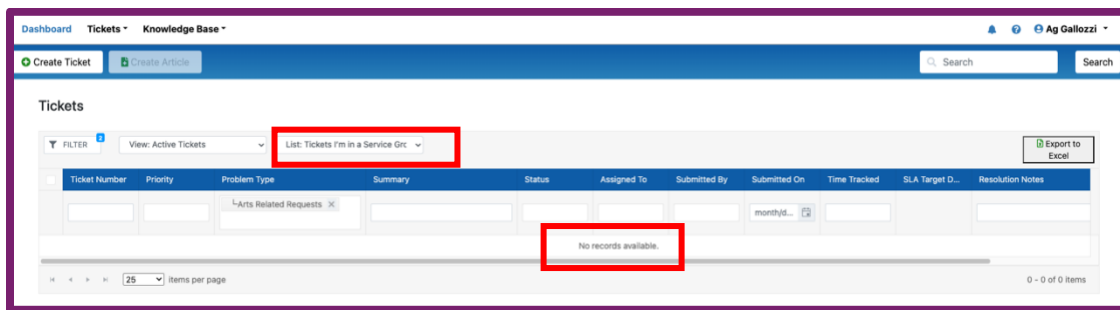
Filter: List: Tickets I'm in a Service Gr...

Ticket Number	Problem Type	Site	Status	Submitted By	Service Groups	Summary	Scheduled Date	Priority	Tag Number
2812	Classroom Assets	Learning Campus	Request Approval	Leo Lion	Principals and AP, Technology Tickets	display is cracked		High	
2786	New Teacher	Learning Campus	Open	Leo Silva	Human Resources, Principals and AP	Maria Jones		High	
2768	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	007007
2767	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	LOGITECH01
2766	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	007007
2762	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging		High	007007

- **Export support:** When exporting while this filter is active, only the visible filtered results (your Service Group Tickets) will be included in the export file.

6	2766	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
7	2762	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
8	2759	Paper Jam	Learning Campus	New	Mario Torres	Coaches, Principals and AP, TECH - Critical	Paper is stuck	Medium	
9	2758	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
10	2754	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
11	2752	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	2.46325E+12
12	2751	CB Charging Issue	Learning Campus	On Hold	James Bond	Technology Tickets, Waiting on Parts	not charging	High	007007
13	2749	CB Charging Issue	Learning Campus	On Hold	Anna Maxin	Principals and AP, Student Tech Center, Tech	Broken Screen	Medium	654654
14	2748	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	12394
15	2747	CB Charging Issue	Learning Campus	In Progress	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
16	2746	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	12394
17	2742	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
18	2740	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007
19	2738	CB Charging Issue	Learning Campus	On Hold	Anna Maxin	Technology Tickets, Waiting on Parts	charging issue	Medium	007007
20	2737	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	72234
21	2735	CB Charging Issue	Learning Campus	On Hold	James Bond	Technology Tickets, Waiting on Parts	not charging	High	007007
22	2734	Classroom Assets	Learning Campus	Request Approval	James Bond	Principals and AP, Technology Tickets	not charging	High	007007

- **Grid state is preserved during Session:** If you click into a ticket and return to the grid, your filters, sort order, and page settings remain intact. If you log out of the system and log back in, your grid will be reset with the List options defaulting back to “List: None”.
- **Clear messaging when no tickets are found:** If no tickets match the criteria, the grid will display the message "No records available".



## 2. Custom Reporting Enhancements

Help Desk version **9.3** delivers a major enhancement to the **Custom Reporting** experience by introducing **Shared Reports**, allowing users to collaborate more effectively by sharing reports with others in their district. In addition, users can now **delete saved reports** they no longer need, helping streamline the reporting workspace.

These updates are a direct expansion of the **Custom Reporting (Beta)** feature introduced in version 9.1 and designed to give districts greater control over how they access and analyze Help Desk data. By moving beyond static, preconfigured reports, this new functionality allows users to build custom reports that align with their specific workflows, information needs, and decision-making processes.

You can now **share custom reports** you've built with other users in your district. This feature promotes collaboration, transparency, and consistency across Help Desk teams.

### Key Benefits:

- Share any **saved custom report** with one or more users in your district.
- Access a new **Shared With Me** section to quickly find reports others have shared with you.
- View shared reports in read-only mode, ensure data integrity.

- Maintain version control—shared reports are copies, so changes you make won't affect the original or others' copies.

## Shared with Me Tab

A new **"Shared with Me"** tab is now available under the **Reports > Custom Reporting** section, giving technicians and admins a central location to access reports that have been shared with them by other users.

When another user shares a report with you (whether you're a **service technician** or **service admin**), it will appear in the new **"Shared with Me"** tab.

The grid includes the following **columns** for each shared report:

- **Report Name:** The name of the shared report. Click to open and view the report.
- **Date Created:** Shows the date the report was shared. Helpful for identifying recent items.
- **Created By:** Displays the name of the user who shared the report with you.
- **Last Modified:** Indicates the last time the report was edited by the person who it was shared to.
- **Actions:**
  - **Share Report:** the person who receives the report can also share a copy of the report to others.
  - **Delete:** the person who receives the report can delete it from their shared tab, this will not impact the current report.

Name	Date Created	Created By	Last Modified	Actions
Asset Tickets by Site	09/18/2025 5:11 PM	AnnaMaria Gallozzi	09/18/2025 5:11 PM	<a href="#">Share</a> <a href="#">Delete</a>
COPY: Product Type by Technician	09/17/2025 12:36 PM	AnnaMaria Gallozzi	09/17/2025 12:36 PM	<a href="#">Share</a> <a href="#">Delete</a>

**Note:** Reports shared are independent copies of the sender's original report. Any edits you make apply to your copy. A message is posted on the Shared with Me tab to reiterate that:

*"The reports listed here are copies that were shared with you. They are not live versions of the sender's reports. Any changes you make will only apply to your copies and will not affect the sender's originals or other recipients' copies."*

Dashboard Tickets Knowledge Base Reporting

Create Ticket Create Article Search Search

Custom Reporting Create New Report

Created by Me Shared with Me

The reports listed here are copies that were shared with you. They are not live versions of the sender's reports. Any changes you make will only apply to your copies and will not affect the sender's originals or other recipients' copies.

Name	Date Created	Created By	Last Modified	Actions
Asset Tickets by Site	09/18/2025 5:11 PM	AnnaMaria Gallozzi	09/18/2025 5:11 PM	Download Delete
COPY: Product Type by Technician	09/17/2025 12:36 PM	AnnaMaria Gallozzi	09/17/2025 12:36 PM	Download Delete

1 - 2 of 2 items

## Shared Reports

### How to Share a Report:

1. Navigate to **Reporting > Custom Reporting**.
2. On the **Created by Me** tab, locate the report you want to share.

Dashboard Tickets Parts Knowledge Base Reporting

Create Ticket Create Article Search Search

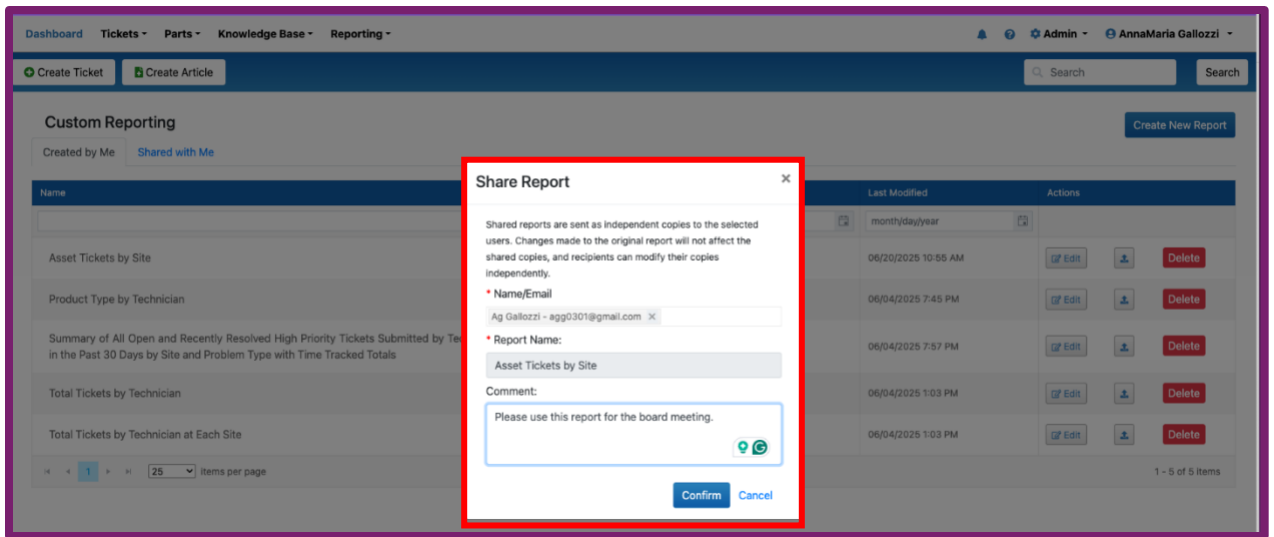
Custom Reporting Create New Report

Created by Me Shared with Me

Name	Date Created	Last Modified	Actions
Asset Tickets by Site	06/04/2025 7:44 PM	06/20/2025 10:55 AM	Edit Share Delete
Product Type by Technician	06/04/2025 7:45 PM	06/04/2025 7:45 PM	Edit Share Delete
Summary of All Open and Recently Resolved High Priority Tickets Submitted by Technicians in the Past 30 Days by Site and Problem Type with Time Tracked Totals	06/04/2025 7:57 PM	06/04/2025 7:57 PM	Edit Share Delete
Total Tickets by Technician	06/04/2025 1:01 PM	06/04/2025 1:03 PM	Edit Share Delete
Total Tickets by Technician at Each Site	06/04/2025 1:03 PM	06/04/2025 1:03 PM	Edit Share Delete

1 - 5 of 5 items

3. Click the **Share** icon to open the Share Report window.

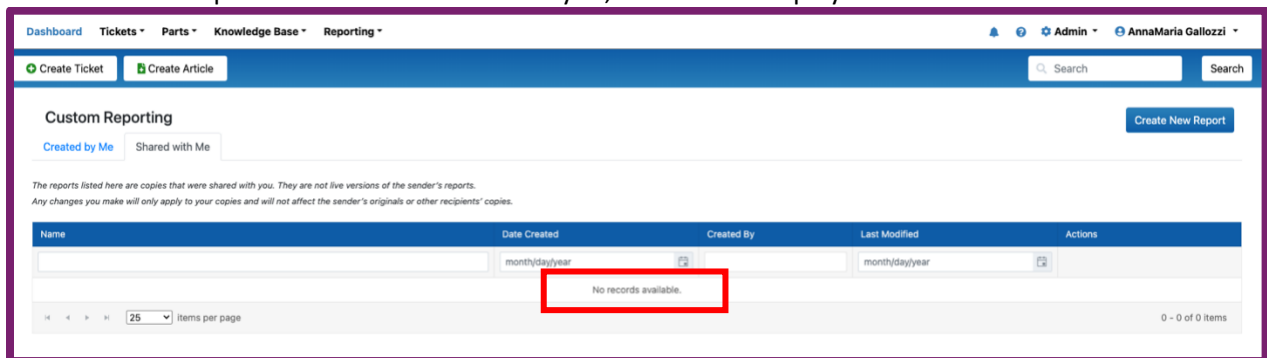


4. In the **Name/Email** field select user (up to 100 at a time) from the dropdown list or enter the email for your Service Technicians or Service Admin team members.
5. **Report Name** field is automatically populated with the report name you've created.
6. (Optional) Add a **Comment** – this will appear in the email notification to recipients. Comments can be a maximum of 8,000 characters.
7. Click **Confirm** to share.
  - o The report is shared immediately.

### How to View Shared Reports

1. Navigate to **Reporting > Custom Reporting**.
2. Click the **Shared with Me** tab at the top of the page.
3. Shared reports will display in the grid.

**Note:** If no reports have been shared with you, the tab will display: *"No records available."*

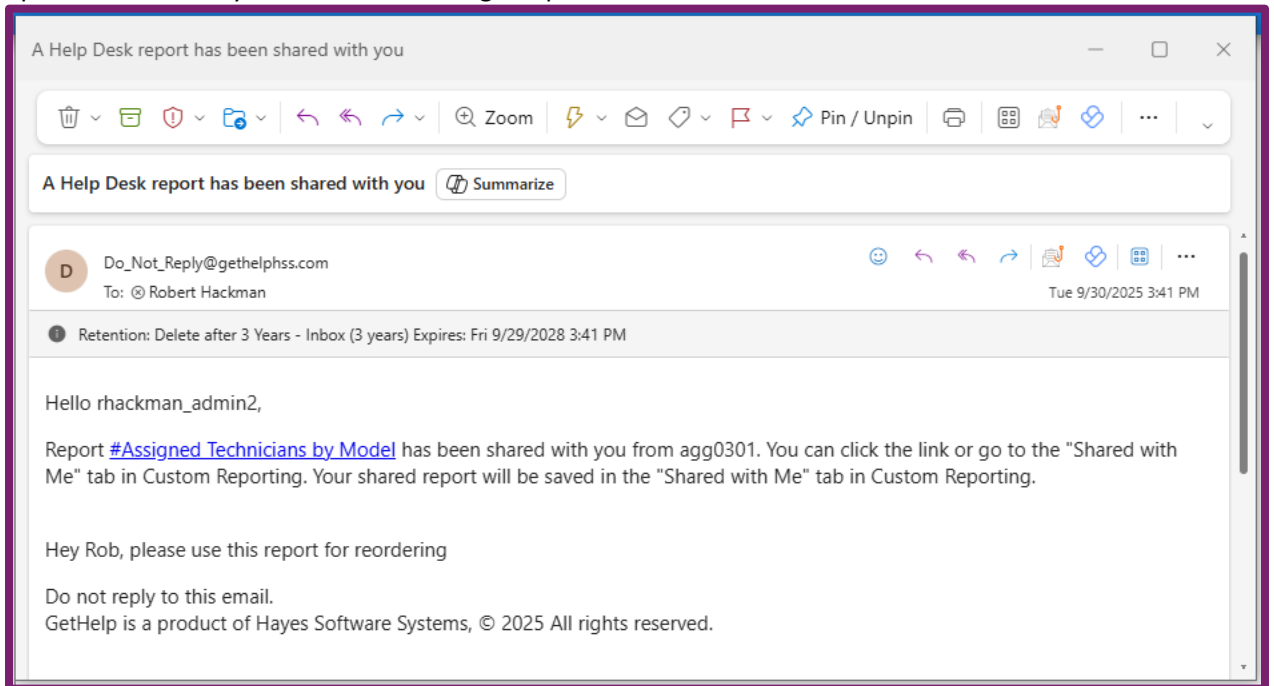


**Note:** If you want to make changes to a shared report, you must use **Save As** to create your own editable version. Once saved, the report will appear in your **Created by Me** list, and you can edit, rename, or share it like any other report you've created.

### Email Notifications:

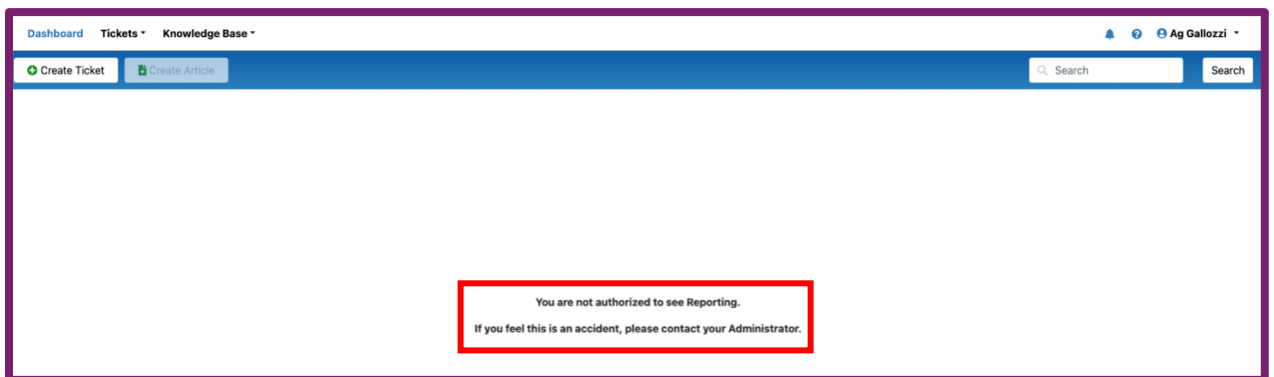
- When a report is shared, recipients automatically receive an email that includes:
  - o A clickable link to the shared report in Frontline Help Desk
  - o The senders name who shared the report with you
  - o Any comment added by the sender

- Email notifications use a standard subject line and body. The only customizable part is the optional comment you add when sharing a report.

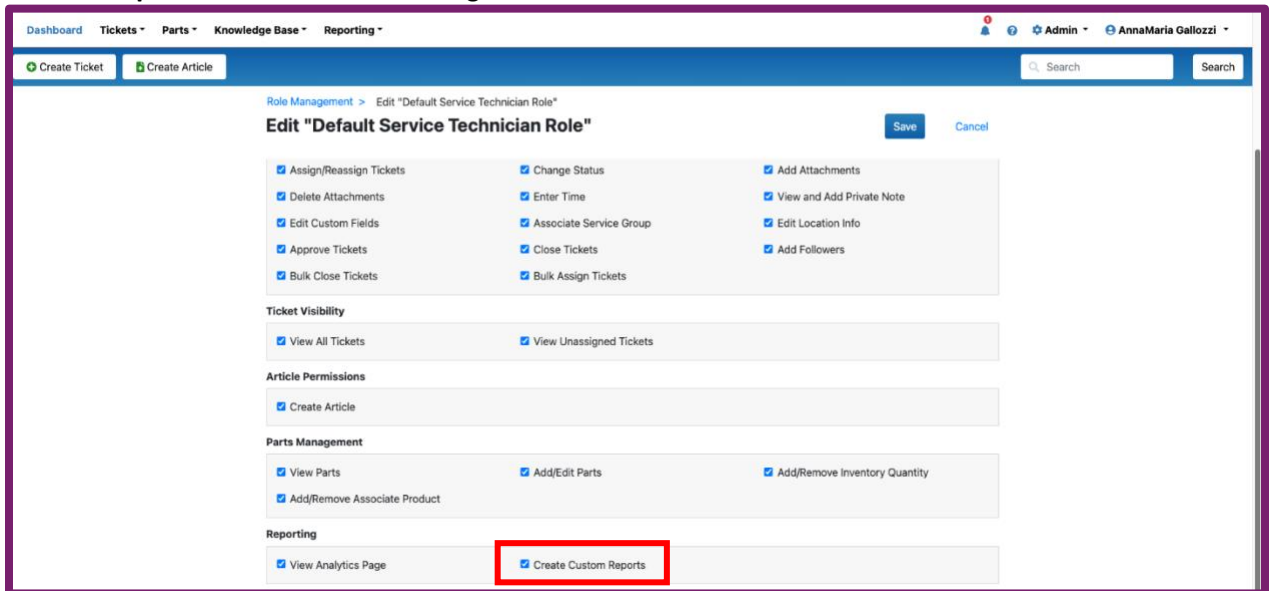


#### Permissions Matter:

- If recipients have reporting permissions, the link will open the shared report directly.
- If they do not have "Create Custom Reports" permissions, they'll see this message: *"You are not authorized to see reporting. If you feel this is an accident, please contact your Administrator."*



- **Permissions for Shared Reports:** To share or view shared reports, users must have **Create Custom Reports** enabled in Role Management.



- If a recipient is not logged in, they will be prompted to authenticate before viewing.

#### Notes:

- Shared reports are **read-only** to recipients and the original report cannot be edited or deleted by others, just by the creator.
- Only users with **Create Custom Reports** permission can receive shared reports.
- The recipient of the shared report can delete that report from their shared tab.
- If the creator updates a report shared with others, that report needs to be reshared.
- When a report is deleted by the creator, all shared recipients will still have access to the report. The report is shared as a standalone copy.
- At this time, only one report can be shared at a time.
- Currently, email notifications are always sent and cannot be disabled.
- Shared reports do not include an audit trail — admins cannot track who a report was shared with after the fact.

## Report Deletion

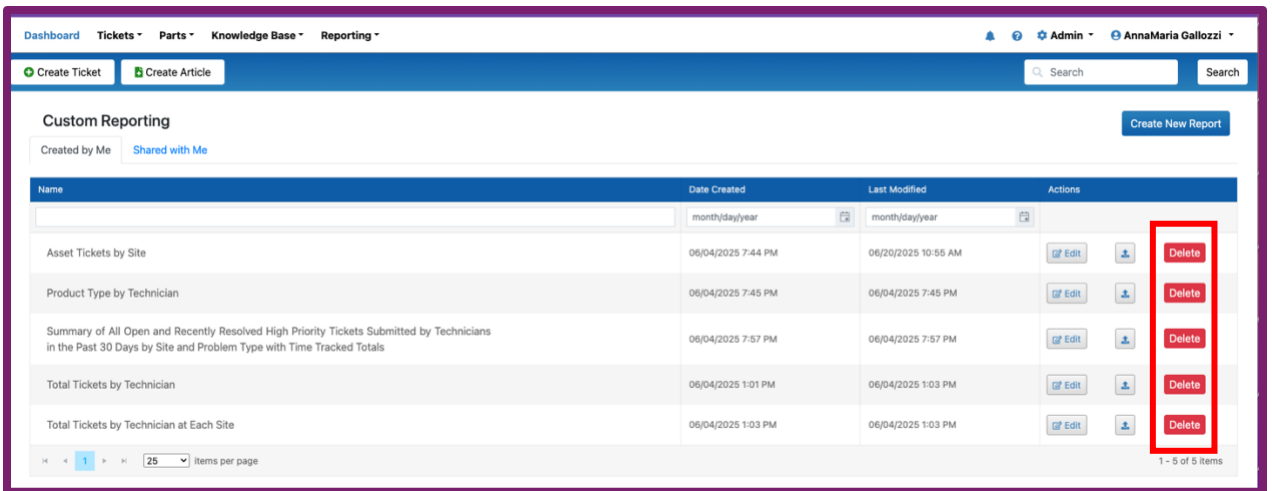
We've added a new option to help you keep your reporting space organized. With version 9.3, you can now **delete saved reports** that you no longer need.

#### Deletion Capabilities:

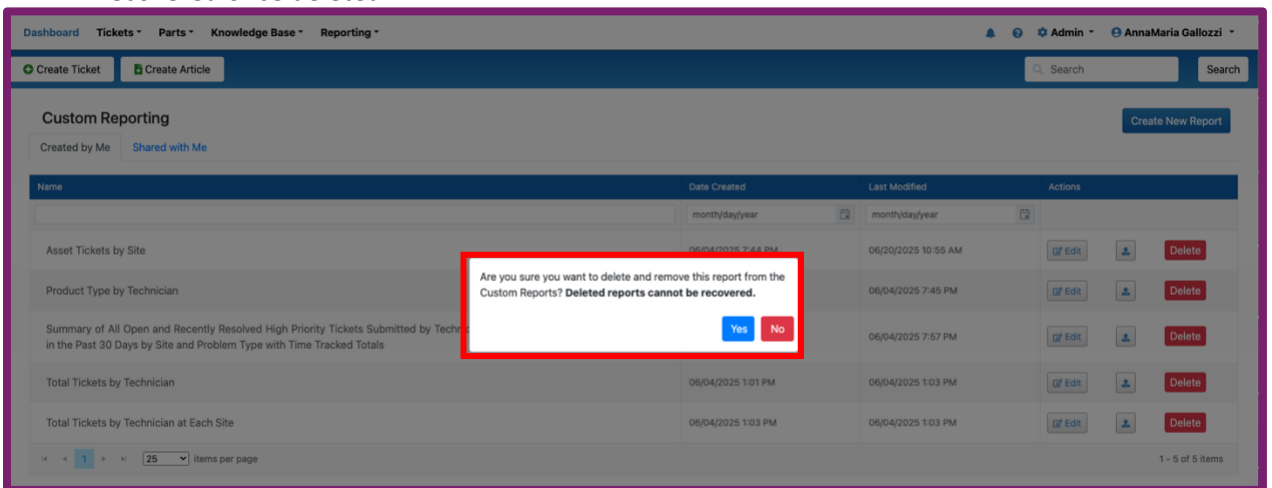
- Users can delete their own saved reports at any time.
- **Deletion is permanent—once deleted, a report cannot be recovered.**
- Recipients of shared reports will automatically lose access if the original is deleted by the creator.

#### How to Delete a Report:

1. Navigate to **Reporting > Custom Reporting**.
2. In the **Created by Me** and **Shared with me**, find the report you want to remove.
3. Click the **Delete** button.



4. Confirm the deletion when prompted.
  - A confirmation message will appear to ensure you understand that the report cannot be recovered once deleted.



**Notes:**

- Recipients will not receive a **notification** if a shared report they had access to is deleted.
- If a user accidentally deletes a report, **customer support can not restore it** on the backend.
- Reports must be deleted **individually**; bulk delete is not available.