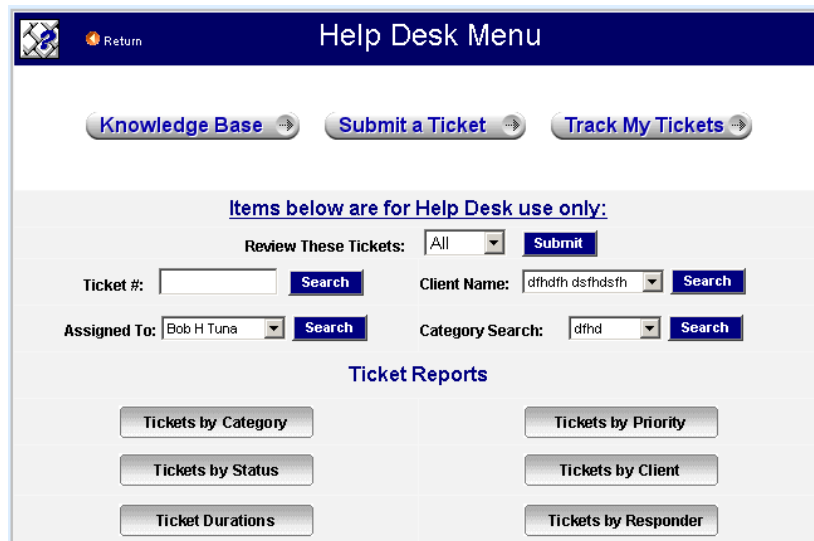


6.9 Help Desk Module



The FoxSuite Help Desk module is designed to facilitate the online processing of client requests for help or information. The basic model is based on the premise that one or more help resources exist within an organization, and that a member of the organization may request assistance from these resources. With this in mind, the Help Desk module allows a “client” to submit an online help “ticket” which can then be tracked through the response process and ultimately to problem resolution. The module also includes a Knowledge Base Directory for Frequently Asked Questions (FAQ’s) or other knowledge content helpful for the organization. Having the Knowledge Base available and populated can reduce the load on help resources and save time for members searching for information.

The Help Desk module’s Main Menu is shown below.



Help Desk Menu

[Return](#)

[Knowledge Base](#) → [Submit a Ticket](#) → [Track My Tickets](#) →

Items below are for Help Desk use only:

Review These Tickets: [Submit](#)

Ticket #: [Search](#) Client Name: [Search](#)

Assigned To: [Search](#) Category Search: [Search](#)

Ticket Reports

[Tickets by Category](#) [Tickets by Priority](#)

[Tickets by Status](#) [Tickets by Client](#)

[Ticket Durations](#) [Tickets by Responder](#)

6.9.1 The Help Desk Process

The process would normally begin when a client requests information, or describes a problem for which assistance is needed. The client would submit a new Help Ticket by completing the form shown below.

New Help Ticket Submission

Name: Jim H Smith **Date:** 2/1/2005 4:26:28 PM

Phone: 234-456-3456 **Email:** cfa@brightsuite.com

Category: - Make Selection - **Priority:** Medium

Organization: Finance

Short Title: *

Problem or Help Needed: *

File Attachment (optional) Browse...

The Client can upload a file as part of the Help Ticket documentation. This file could be a screen shot or other document that might help describe the problem or issue to be resolved. The document is uploaded to the **docs/Uploads** folder. Files like these might accumulate over time and may need to be cleared out periodically.

The Help Ticket would be given a status of “New” and enter the system for inspection and response from the help function’s resources. Clients can check the status of their tickets using the main menu to access a Client Review screen similar to the one shown below

Client Review

Name: Jim H Smith **Date:** 1/11/2005 4:01:02 PM

Phone: 234-456-3456 **Email:** cfa@brightsuite.com

Category: Hardware **Priority:** High

Title: My Laptop won't startup

Ref. File: [..\docs\uploads\](#)

Additional Client Comments ?

Status: Closed **Updated:** 1/11/2005 4:03:30 PM

Problem Log:

Help Desk: (Bob H Tuna) 1/11/2005 4:03:30 PM
Great - I'll closeout the ticket.

Client: (Jim H Smith) 1/11/2005 4:03:04 PM
That worked thanks!!

Help Desk: (Bob H Tuna) 1/11/2005 4:02:10 PM
Try the reset button in the battery compartment.

Client: (Jim H Smith) 1/11/2005 4:01:02 PM
My Laptop won't startup - won't work with battery or AC.

Emails to Targeted Help Desk Personnel

In addition to the normal ticket submission to the database – FoxSuite can be configured to send an email version of each new ticket to designated Help Desk

Personnel. For instance – you may want an employee (say Jack Burns for instance) to receive an email each time a Help Ticket with the category “hardware” is submitted. This way, Jack is notified of the ticket by email and would not have had to login to FoxSuite to be aware of the ticket.

Targeted emails can be configured by clicking the small purple button next to the Category field on the New Ticket form. This will bring up the screen shown below where the Administrator can configure one or more e-mail addresses to be associated with a particular Help Ticket category.

Ticket Category	Ticket Email Address
<input type="checkbox"/> Email	
<input type="checkbox"/> Hardware	jburns@foxsuite.com
<input type="checkbox"/> Internet	
<input type="checkbox"/> Printer	
<input type="checkbox"/> Questions	
<input type="checkbox"/> Software	

Help Desk personnel would also use the Main Menu to view a list of new help requests, and would typically respond to the client’s request or seek additional information. The online dialog between the client and help desk responders is captured in a color-coded and time-stamped history log as can be seen in the screen below. Each help-desk response is also forwarded to the client by email to promote quick resolution of issues and the timely closeout of help tickets in the system. Example emails to the help desk responder, and back to the client are shown below:

From: cfa@dcasoft.com
Date: October 11, 2006 10:52 AM
To: support@dcasoft.com; cfa@dcasoft.com
Subject: Help Ticket ID: 59-----Internet Connection Down

From the Help Desk ... a new Help Ticket has been submitted by: Jim H Smith
The Ticket Category is: Internet
The Ticket Priority: Medium
The Text of the Ticket is:
My Internet connection is down - it was working fine this morning. Wondering if it is just me or a wider problem.

The Client's Email Address is: cfa@dcasoft.com
The Client's Phone # is: 234-456-3456

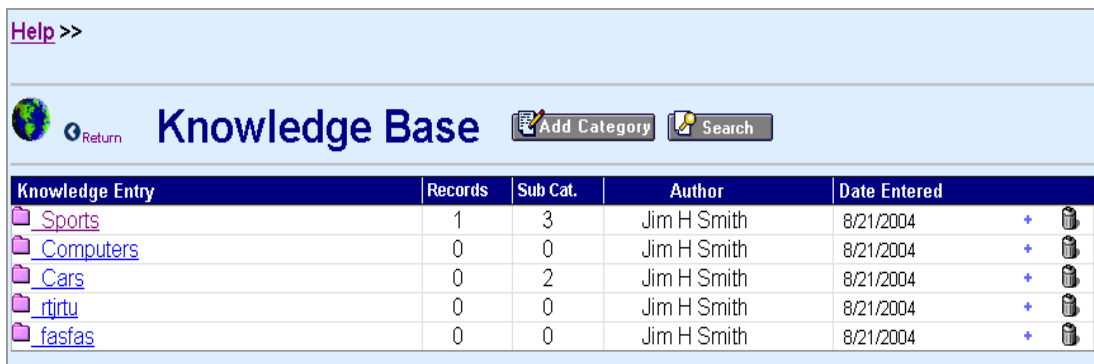
personnel to respond to tickets, and access help desk reports. A “3” rating is required to delete tickets from the system.

The Help Desk Module also produces a number reports concerning ticket history and classifications. One report also tracks overall ticket durations from initiation to final closeout.

6.9.2 The Knowledge Base

The Knowledge Base is a structured directory of information or knowledge helpful to the organization. Users can access the appropriate topic by navigating or “drilling-down” through categories of interest – or – can search for topics of interest using the search utility. Subject matter experts with appropriate permissions can also create new knowledge content by navigating to the appropriate directory level and then choosing the Add FAQ button. Added content will often be in the form of a Question and Answer, but can also be entered as a Topic and Knowledge Content format.

The root directory of the Knowledge Base with some example categories is shown below:



The screenshot shows a web interface for a Knowledge Base. At the top left, there is a "Help >>" link. Below it, there is a "Return" button with a globe icon. The main heading is "Knowledge Base" in large blue font. To the right of the heading are two buttons: "Add Category" and "Search". Below the heading is a table with the following columns: "Knowledge Entry", "Records", "Sub Cat.", "Author", and "Date Entered". The table contains five rows of data, each representing a category. Each row has a folder icon to the left of the category name and a plus sign and a trash can icon to the right of the "Date Entered" column.

Knowledge Entry	Records	Sub Cat.	Author	Date Entered
Sports	1	3	Jim H Smith	8/21/2004
Computers	0	0	Jim H Smith	8/21/2004
Cars	0	2	Jim H Smith	8/21/2004
rtjrtu	0	0	Jim H Smith	8/21/2004
fasfas	0	0	Jim H Smith	8/21/2004

Clicking on the Sports categories for instance – will bring up any content previously entered as shown below. As you can see Categories can be Deleted and topics can be both Edited and Deleted.

Help >> Sports

Knowledge Base

Knowledge Entry	Records	Sub Cat.	Author	Date Entered	
Football	2	7	Jim H Smith	8/21/2004	+
Baseball	0	1	Jim H Smith	8/21/2004	+
Golf	0	0	Jim H Smith	8/21/2004	+

Question or Knowledge Area	Views	Author	Date Entered	
Why don't we cover Basketball ?	7	Jim H Smith	8/21/2004	

Member Security Settings:

For new Members, the Help Desk / Knowledge Base module has 4 overall levels of Access Permissions as shown below:

Help Desk No Access Submit Ticket Help Desk Response Delete Ticket

These 4 choices can be further defined in terms of the starting named security profiles, and their allowable actions as shown in the chart below:

Advanced Security	No Access	Submit Ticket	Help Desk Response	Delete Ticket	Delete Ticket
Security Rating	Guest	Basic	Advanced	Admin	
Submit a Ticket		✓	✓	✓	✓
Check My Ticket Status		✓	✓	✓	✓
Update my Tickets		✓	✓	✓	✓
View All Tickets			✓	✓	✓
Help Desk Response Form			✓	✓	✓
Reports			✓	✓	✓
Delete Tickets				✓	✓