

14 QUESTIONS

To Ask When Evaluating A Help Desk System

Asking these questions will ensure that you choose the right help desk system for your district.

1

How are help desk tickets created and submitted?

WHY YOU WANT TO KNOW: When handling time-sensitive help desk issues, it's important that users can create a ticket seamlessly and include the details technicians need to resolve the problem. Systems that allow for ticket creation through multiple channels make the process seamless for both service technicians and customers (your students and staff). Consider options for automated ticket creation from emails sent to your help desk system as well as a user portal for customers to create/update tickets and view their status.

2

Can you create custom problem types for common tickets?

WHY YOU WANT TO KNOW: Your district often receives tickets with the same problem type such as password resets, cracked screens, or network connectivity. Ask if the system can create customized problem types that correlate with those common issues. For each problem type, you should be able to create automated ticket routing, customized ticket templates, and detailed reporting. This will create workflow efficiencies and reportable data needed to identify opportunities for improvement in training, resolution, and more.

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Tickets should include the details technicians need to resolve the problem efficiently.”

3

Can you create ticket templates with custom fields based on the problem type?

WHY YOU WANT TO KNOW: The information your technicians need to resolve email issues is very different from that needed for a broken hardware port. Customers provide more complete information upon initial ticket submission when asked custom and/or required fields relevant to that specific problem. Choose a help desk system that allows you to create customized ticket templates based on the problem type. This will ensure technicians receive more complete information and streamline the resolution process.

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4 *Are attachments able to be uploaded to the ticket?*

WHY YOU WANT TO KNOW: Seek out a system that allows customers or technicians to upload attachments to new or existing tickets through user-friendly options such as email, drag and drop, and file uploads. A screenshot of an error message, image of asset damage, or documentation of previous work orders can be critical to speedy ticket resolution. And, managing ticket attachments in a cloud-based system ensures awareness for anyone accessing the ticket throughout its lifecycle.

6 *Can you assign priority to tickets?*

WHY YOU WANT TO KNOW: When managing a help desk, response time is critical. But, some issues naturally have a higher priority than others (for example, a teacher unable to connect to the internet versus a student whose key popped off the keyboard). Your next help desk system should include the ability to assign priority to tickets based on your SLA expectations.

“ *Knowledge base articles empower customers to troubleshoot issues on their own.* ”

5 *Can you create a knowledge base for self-service?*

WHY YOU WANT TO KNOW: Your help desk system should include the ability to build a knowledge base with detailed instructions for self-service. The creation of searchable FAQ articles empowers customers to troubleshoot issues on their own. Ideally, the system will automatically present knowledge base articles to the individual by identifying keywords used when a ticket was created. Reducing simple, common queries frees up your technicians' time to focus on more complex tickets, while also providing just-in-time support to your customers.

7 *Can you set up conditional rules for automatic ticket assignment?*

WHY YOU WANT TO KNOW: To avoid tickets from sitting in a queue unassigned, choose a system that will automatically assign tickets to the most qualified technician(s) upon submission. Make sure the system can support a hierarchy of rules that contain conditions and routing actions customized to your team's needs and skills. These could include assignment based on location, problem type, or keyword in the summary (e.g. Chromebook). By immediately escalating tickets to the most qualified technician(s), you'll avoid service bottlenecks and resolve tickets more quickly.

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8 *Can you assign tickets to a group of technicians instead of a single person?*

WHY YOU WANT TO KNOW: If multiple technicians need to work on one ticket, ask if the system requires a ticket to be assigned to be able to view, edit or comment. Adding the appropriate technicians to a “service group” will provide the ability for multiple technicians to view specific incidents and service requests. Managing tickets this way keeps the ticket unassigned or assigned to the group, and multiple users can see open tickets, add comments, and work together to complete requests.

10 *Can you set up automatic notifications for work order status changes or updates?*

WHY YOU WANT TO KNOW: Customers today expect transparency on the status and resolution of their ticket. Your help desk system should automatically send notifications and allow customers to log into a portal to review status changes and technician notes. Alternately, if your technician needs more information to process the ticket, the system should be able to notify the customer via email to make sure they respond as quickly as possible. Automated notifications reduce the number of calls and secondary emails asking for status updates, allowing technicians to dedicate their time to resolution instead of administrative tasks.

“ *Spend more time resolving tickets and less time managing them with integrated help desk and asset management systems.* ”

9 *Does the help desk system integrate with my asset management system?*

WHY YOU WANT TO KNOW: An integration between your help desk and asset management systems means your techs will spend more time resolving tickets and less time managing them. Choose a system that automatically pulls asset details such as location, assignment, and make/model onto the help desk ticket. Techs will avoid having to log in and out of separate systems to get the information needed to solve the problem. Ideally, the integration will also push help desk ticket history into your asset management system so you have a complete understanding of the health of your district’s assets.

11 *Can you view a historical record of notes and changes on a ticket?*

WHY YOU WANT TO KNOW: A full record of historical information should be accessible within the help desk system for reporting and oversight purposes. Activities should be timestamped and tied to a user to give your team increased accountability and an audit trail. These include when tickets are resolved, a comment has been added, or a ticket is reassigned to another technician. Many tech teams also desire the ability to leave private notes on a ticket without notifying the customer.

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Is there a dashboard based on role or function?

WHY YOU WANT TO KNOW: Your technicians need to be able to easily see relevant tickets. Being able to sort and filter tickets by assignment, problem type, priority, status, ticket number, creation date and recently edited allows your technicians to quickly focus on relevant issues. Additionally, administrators should have the ability to see the workload of tickets for anyone on the team. Customers should also be able to view a dashboard displaying details of their submitted and closed tickets.

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How many users can access the system and how are they managed?

WHY YOU WANT TO KNOW: Look for a system that doesn't limit the number or type of users and automates their management. Consider the long-term goals and outlook for your district. Your technician team could grow in the future or you may find that some tickets can be resolved by external staff, like a student technician team. If your district expands or opens a new campus, your customer base could grow. Because your student/staff customers turn over often, it's imperative you can add/remove them from the help desk system through your active directory. This sync allows you to provide a streamlined customer experience from ticket submission to closure.

14

Is the system designed for the unique needs of the K-12 educational environment?

WHY YOU WANT TO KNOW: A company familiar with K-12 understands your unique needs and challenges. They offer functionality specifically designed to match the requirements of managing work order requests across buildings, departments, classrooms, staff members, and even students. Vendors should also understand administrative oversight needs, providing you with reporting capabilities so you can evaluate resolution efficiency and training opportunities. A K-12-focused company understands you have limited staff resources and will offer specific technology to automate and improve processes to make it easy for your staff to perform daily tasks.

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