

Target Helpdesk Training

HelpDesk and KnowledgeBase Solutions Designed for Professionals

Training Overview



How this training works

The training will start by going of a few of the basics, covering some of the terminology used but also to learn what it is that *you* want to get from the software.

In the second stage of training we will then go over how to achieve what you want and cover training on any related subjected

(i.e. if you are after inbound email processing, we will help configure this, then move onto how the service works and creating your own canned emails)



System Architecture

Generally Target Helpdesk consists of users classified as follows:

- Managers
- Operators
- Administrators
- Clients

Where people fit...

- Managers and Administrators are typically desktop client users.
- Operators have the choice of either using the desktop client, or the operator web portal to access tickets when they are out and about.
- Clients submit requests or enquire via an operator (i.e. telephone in) or via email and also the client web portal.

Terminology

- KB – The KnowledgeBase is a place where you can create knowledge but also recycle knowledge from tickets
- Ticket – The ticket is the item that is tracked containing client contact details, ticket details, ticket history, asset details, time and material details and custom fields.
- Client Contact – The client contact is the end-user that you are supporting
- Client – The client is the organisation or “group” of client contacts that you are supporting
- Queue – Are the logical groups that can be used to pool tickets until they are dealt with by a user
- Department – Are the segments that define your helpdesk i.e. first line support or Customer Care
- SLA – Service Level Agreements define how follow-up and due by dates are calculated as well as work as presets for options like status, category, priority and assignee
- Dropdown – Are combo boxes that can be browsed or typed into directly
- Long Lookups – Found as blue hyperlinks next to dropdown boxes for advanced searching and finding
- Dashboard – Is the main screen consisting of the left hand menu and top navigation and menu systems
- Tabs – Are sub menu items for tickets, assets, system options and many other screens in Target Helpdesk
- Users – Are the operators that use Target Helpdesk. I.e. Operators, Administrators and Managers