# Texas Education Agency

TEA HELP DESK

## Agent Guide

Prepared by the TEA Help Desk Team

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# Introduction

The TEA Help Desk Agent Guide is for employees who handle responses to questions and requests for assistance within the agency's online help desk, TEA Help Desk.

Tickets within the TEA Help Desk can be from people within or outside the agency. They may be having difficulty accessing an account, need hardware or software assistance, need help with Ektron, have a question about TEA application, or have some other IT-related problem with which they need assistance.

This guide provides instructions for agents working in TEA Help Desk. It begins with basic topics such as finding and handling tickets and goes on to cover more advanced subjects, such as creating and posting Frequently Asked Questions (FAQs).

# Levels of Access

There are three agent roles in TEA Help Desk:

- Group Admins: This administrative support staff role manages support staff and information within a group. Group Admins can also work tickets within their group. The group admin can see all tickets.

- Staff Agents: This support staff role is assigned tickets and interacts with end users as needed to resolve support issues. The staff agent can see all the tickets for the agent's group.

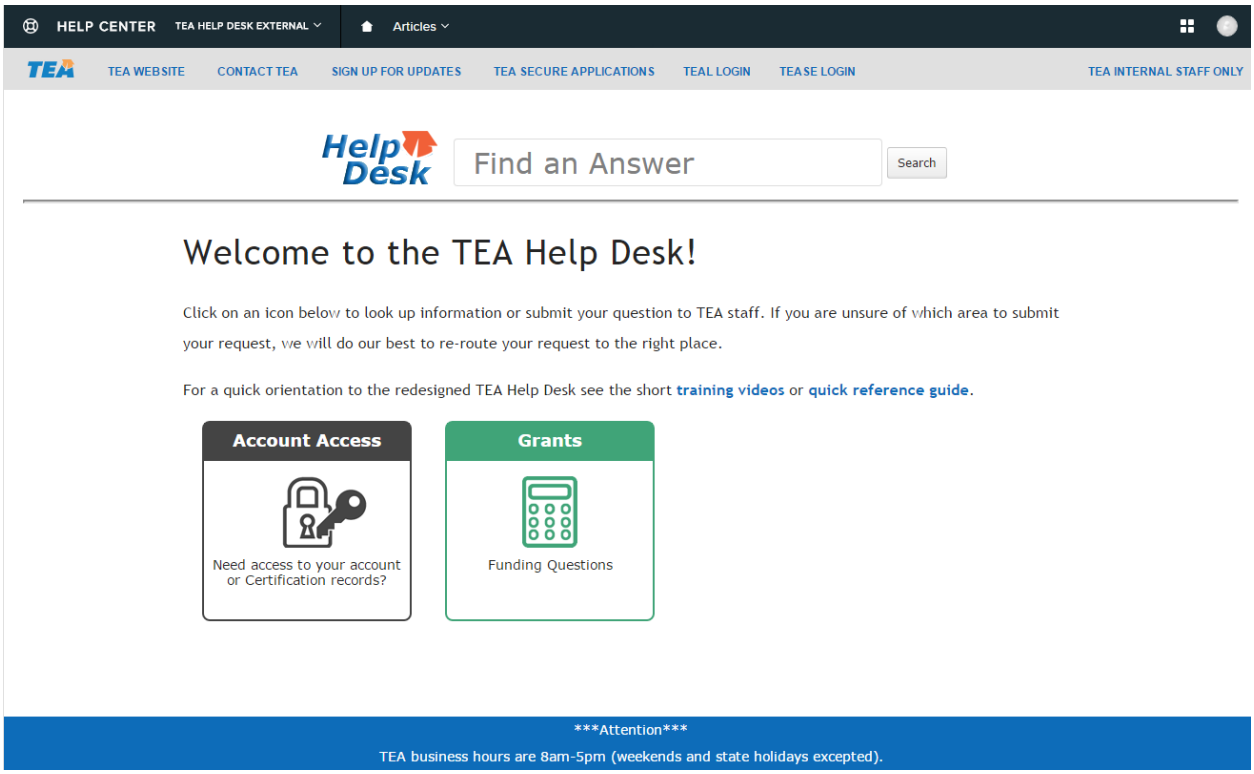
- Light Agents: This role can be copied on and view tickets, add private comments to tickets with the agent's group, and view reports. They cannot be assigned to or edit tickets. Light agents can view all tickets agency-wide.

This guide is directed toward the first two types, staff agents and group admins. The main difference between these two types of agents is which tickets they can see. All agents can see the tickets they have submitted and the ones on which they are copied.

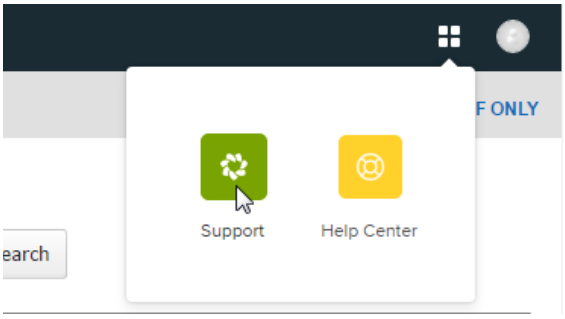
To request access as a TEA Help Desk agent, submit a Computer Access Request, signed by you and your manager, to the Computer Access group in the TEA Help Desk. There is no check box for TEA Help Desk on the form, so be sure to note in the comments section that you need access as an agent to TEA Help Desk and note the role needed. If you have questions about the access or process, submit your question via a ticket request to the TEA Help Desk.

# Opening the Help Desk

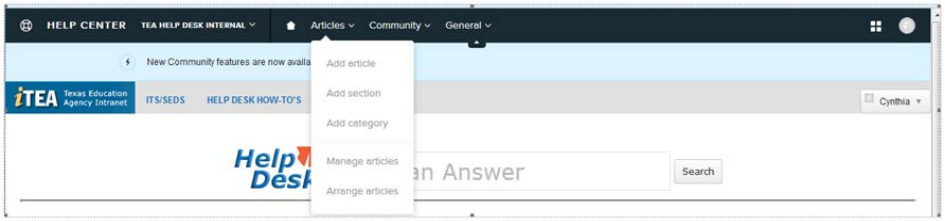
To access the TEA Help desk, go to https://ihelpdesk.tea.texas.gov. A login prompt appears. Log in with the user name and password you use to log in to your desktop. If this is the first time you've logged in, the application takes you to the Help Desk home page.



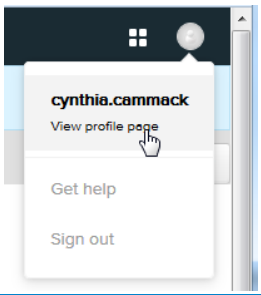

To open the Agent interface, select the Zendesk Products icon at the top right, and then select the Support icon:



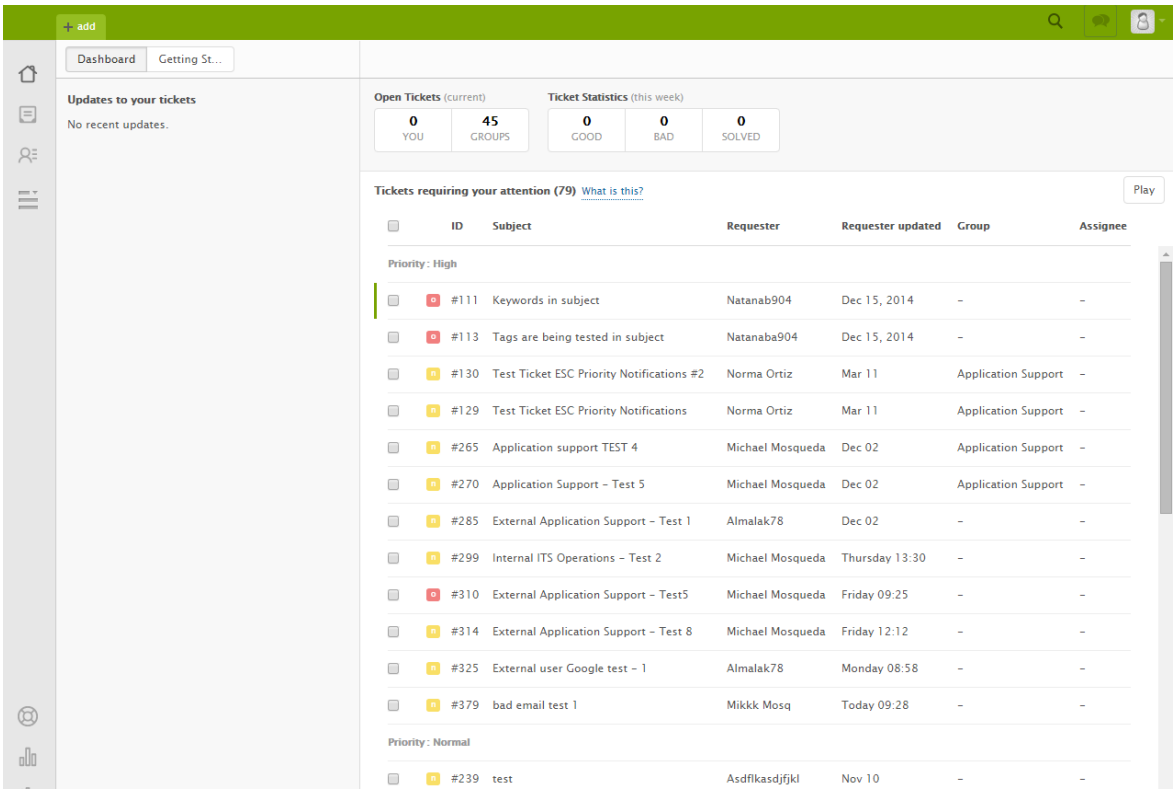
**Note**: Some menu options and controls may have been relocated in the Zendesk user interface since this guide was created. Please look for the agent menu options and controls at the top of your screen after logging in to the internal TEA Help Desk:



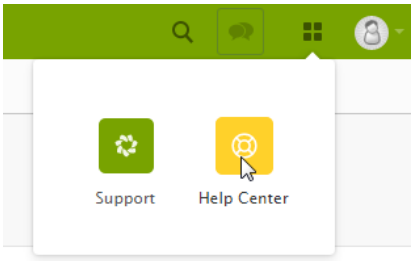

To access your TEA Help Desk profile, click the icon at the upper right:



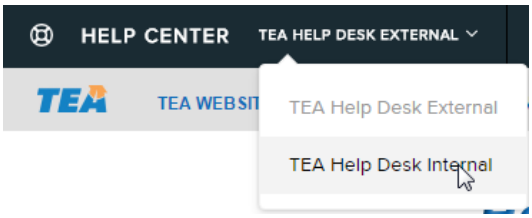

The Agent interface is different from the one seen by regular users:



You can view the interface seen by regular users by clicking the Zendesk Products icon at the top right and selecting the Help Center icon. You will need to go to the Help Center to view the FAQs:



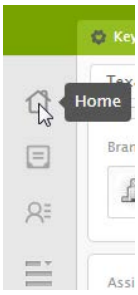

From there, you can switch Help Desks by clicking the **TEA HELP DESK** menu at the top left:



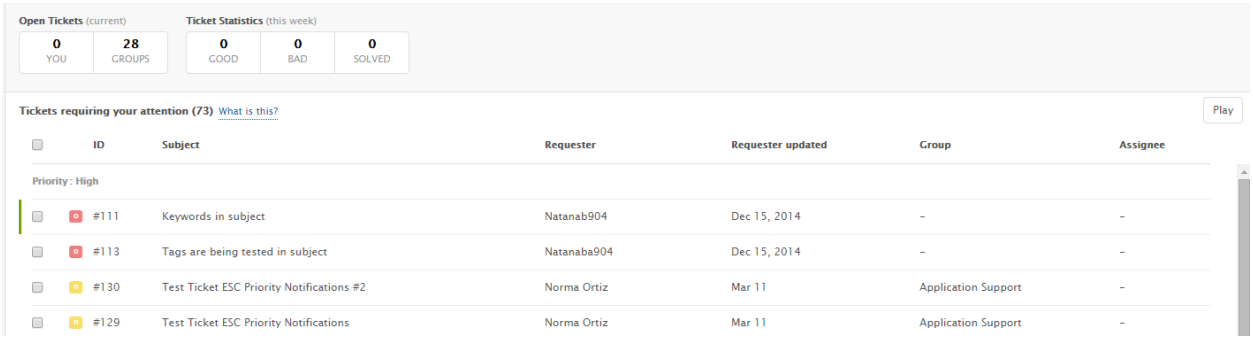

Return to the Agent dashboard by selecting the Support icon again.

# Exploring the Dashboard

Once you have selected **Open Agent Interface,** click the Home icon to view the agent dashboard.



The dashboard provides a quick summary view of tickets in your queue and assigned to you, by priority.




The statistics at the top of the dashboard show the number of open tickets assigned to you and to your group and other for the current week. Clicking on these statistics boxes brings up the list of tickets for that category. If your group uses the Customer Satisfaction feature, your customer satisfaction information is also displayed here.

If a ticket is being viewed by another agent, an eyeglass icon appears next to the colored icon that reflects its state. The yellow **n** icon is for the tickets that have never been assigned. The red **o** icon is for open tickets. Open tickets have been assigned or may have been opened and forwarded from another group but are still ready to be worked by someone in your group.

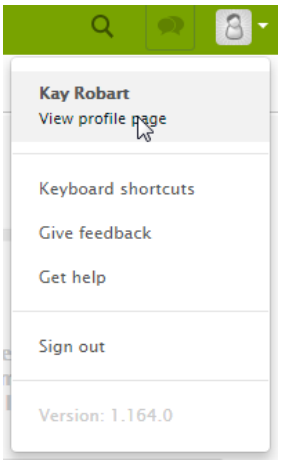
# Using Your Profile Page

From your profile page, you can do the following:

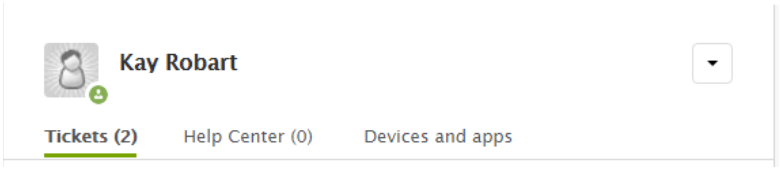
- Set up a name and signature
- View your own, your assigned, or your copied tickets
- View information about your FAQs (Knowledge Base articles)

# Accessing Your Profile

To access your profile page, click the pull-down menu arrow by your name and select **View profile page:**



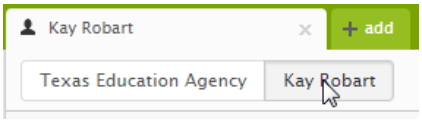

Your profile page appears:



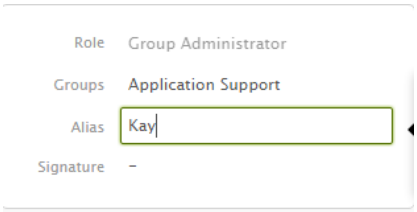

# Setting Up a Name and Signature

Your name, or signature, is appended to any comment or response you make on a ticket. You may not want your full name to appear to users of the TEA Help Desk. In your profile, you can easily change your name to show just your first name, and you can set up a signature. It is recommended that your group develop a standard policy for formatting signatures.

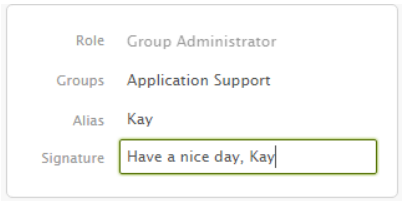
1. On your profile page, click your name:



2. Type your first name in the **Alias** field:



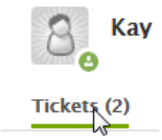

3. To set up a signature, type the text in the **Signature** field.



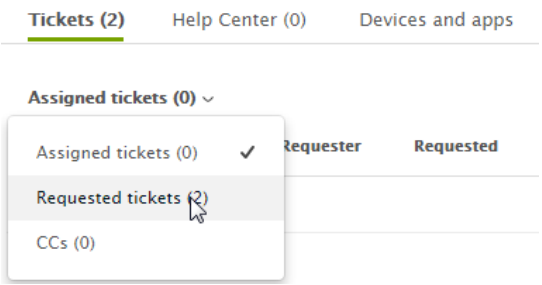

# Viewing Your Tickets

You can set this page to show your own requests, your assigned tickets, or your CC'd tickets, and you can switch from one to the other. Note that light agents cannot be assigned tickets, but they can view them or be copied on them.

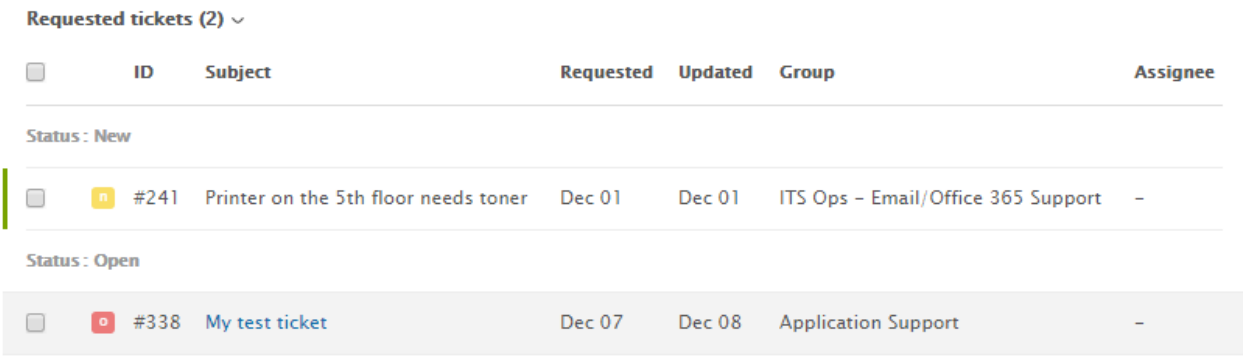
1. Under your name, click **Tickets.** Notice that a number shows how many you have.




2. If you have any assigned tickets, the number of tickets appears below with the list of tickets. If you have other types of tickets, those you submitted or cc's, select them from the drop-down arrow:



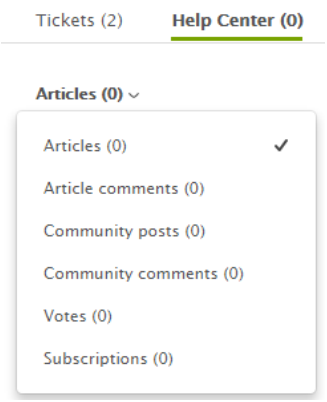
The tickets are listed below:




# Viewing Your FAQs (Knowledge Base Articles)

If you have written, commented upon, or subscribed to any FAQs, you can view comments and other interactions here. Keep in mind, though, that some of the functionality shown on this menu has been disabled for the TEA Help Desk, so zeroes will always appear for some options.

1. Click **Help Center.**
2. Select what you want to view from the drop-down menu arrow:



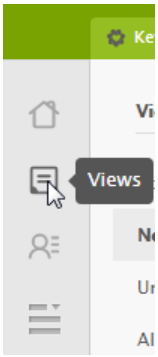
# Viewing, Creating, and Assigning Tickets

Only group administrators and staff agents work tickets, although light agents can be copied on tickets and can view them. This section covers the following topics:

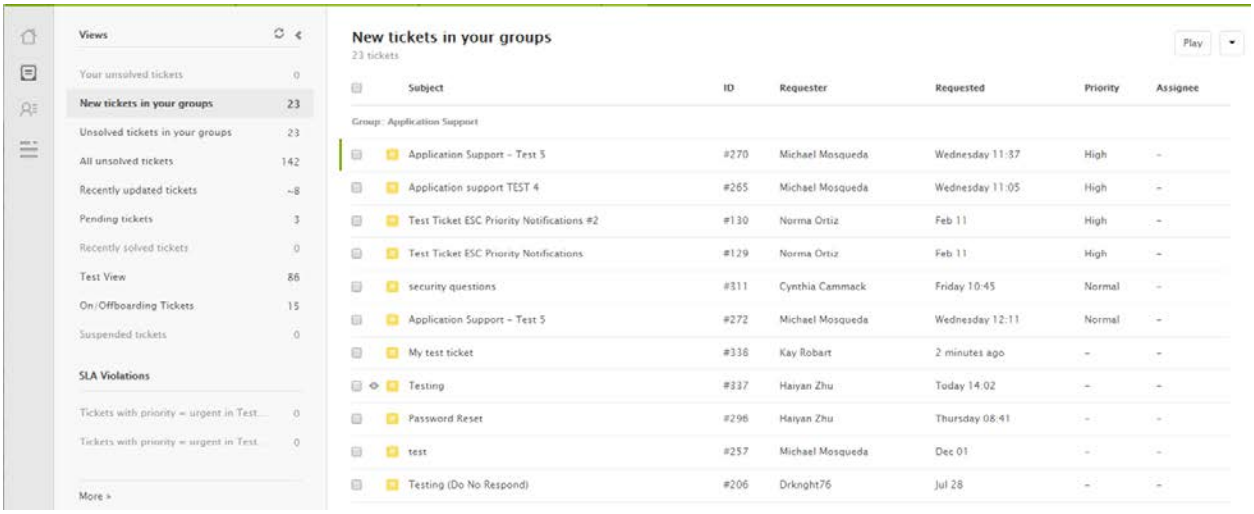
- Viewing your unsolved tickets and other categories of tickets
- Working tickets using the Play feature
- Searching for tickets
- Claiming a ticket
- Assigning a ticket

## Viewing Tickets

Group Admins and agents can view tickets for their groups. Tickets are organized into views, groups of tickets based on certain criteria. You can preview or open tickets from any view. You can view your unsolved tickets as well as tickets in other categories by clicking the Views icon in the sidebar:



A list of your views opens:

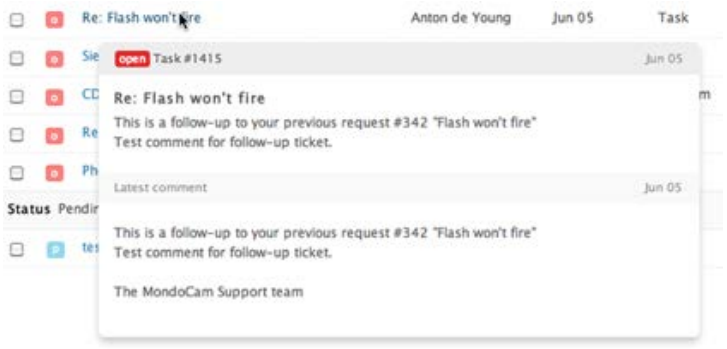



By default, this section displays all the new and open tickets in the agent's group. Many agents prefer to work tickets from this view. The left pane displays other available views. Click on the name of the view to see tickets filtered by that view's criteria. For example, click **Pending tickets** to see all the tickets in your group that were assigned pending status by agents in your group. You can create your own views, and your Group Admin can create views for the entire group.

Tickets in a view are preceded with a colored icon indicating each ticket's current status. Below are the corresponding ticket statuses and colors:

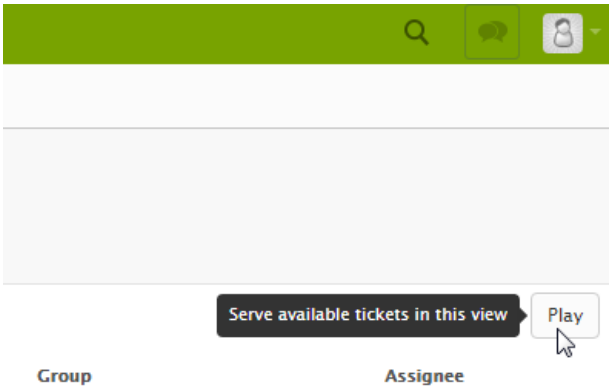
**New**
**Open**
**Pending**
**On-hold**
**Solved**

To preview a ticket in a view, hover your mouse over a ticket title. The ticket preview appears:

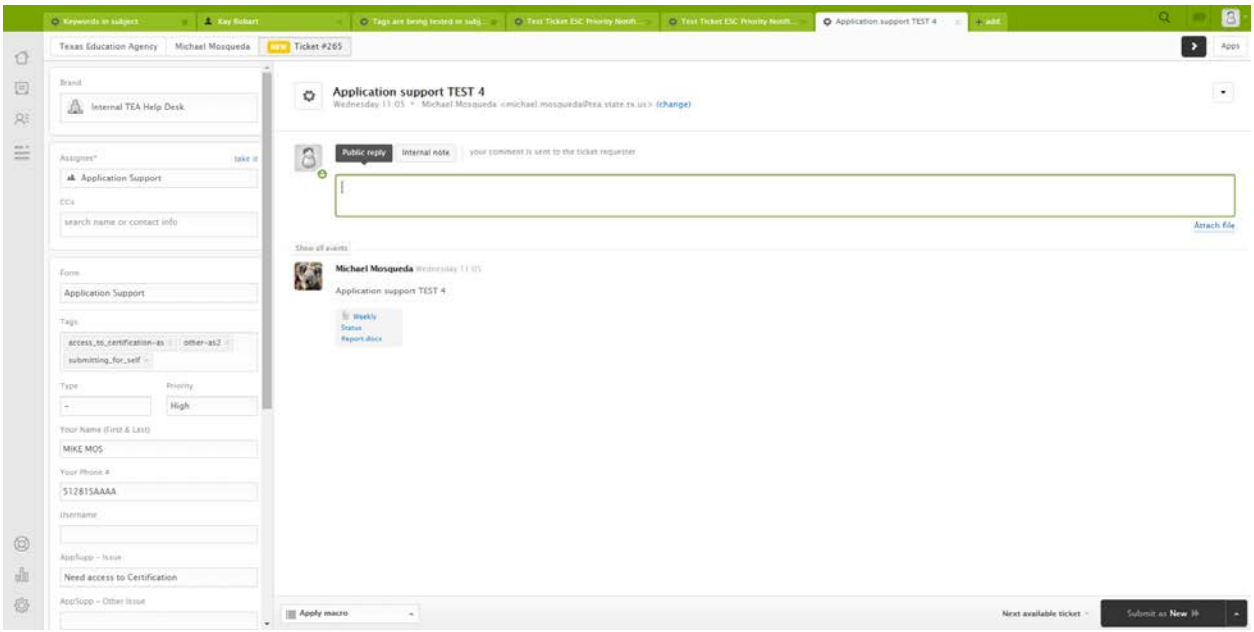


# Working Tickets Using the Play Feature

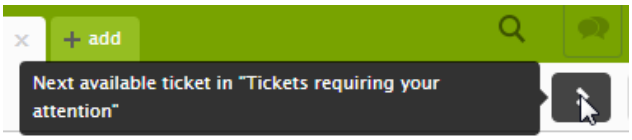
Only Group Admins and Staff Agents can work tickets. You can quickly serve up the new tickets by clicking the **Play** button at the far right above the dashboard. This option opens the first ticket in the view that is *not currently being viewed by another user.* The Play feature allows agents to work tickets smoothly without skipping over tickets and without stepping on other agents who may have already opened a ticket that appears to be next in the queue.




Clicking **Play** serves up the new tickets one at a time, starting from the oldest.



With the ticket open, you can assign it, take it for yourself, or work it as you would normally. When you want to go on to the next ticket, click the Next button:



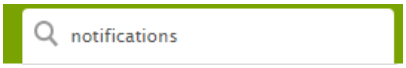

Alternatively, you can open the tickets by clicking on them from the dashboard view. Click the Views icon to see all unsolved tickets in your group.

## Searching

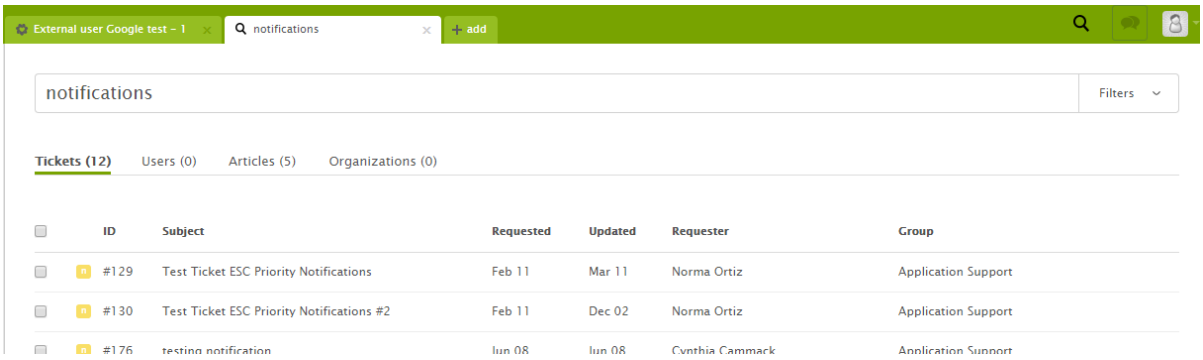
To search for a ticket, you can enter any information into the search field.

1. Click the magnifying icon at the top of the page:

2. Type a search term such as name, topic, or ticket ID number into the field and press Enter.

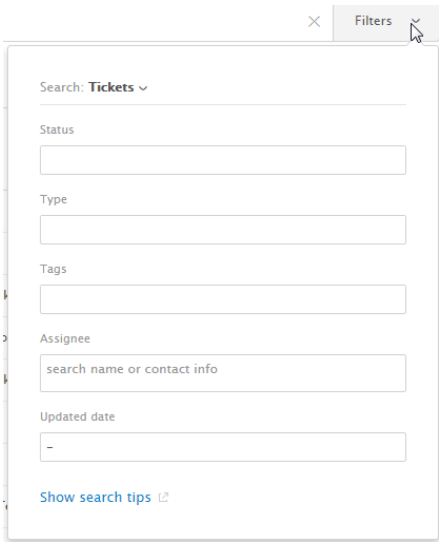



3. If the Help Desk finds more than one ticket containing the text, it shows a list of results:

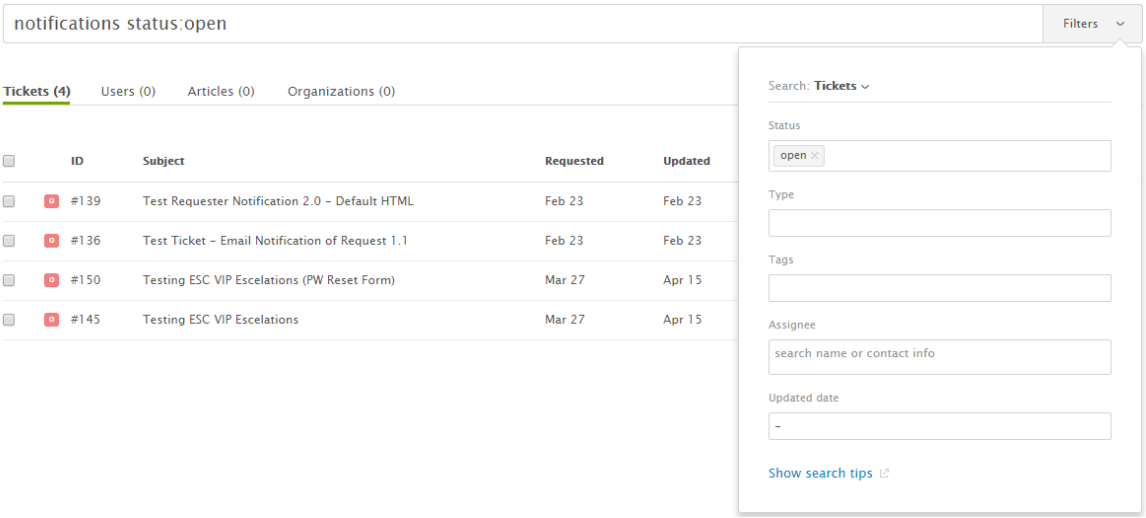



The list of results opens by default to show tickets. Click other categories at the top of the list to view other items, such as users or FAQ articles, that fit the search criteria. If the search finds only one item, it opens that one. For example, if you entered the ID number, it opens the ticket.

4. If you want to narrow the list, you can use the filters to restrict it even more. (Selecting **Advanced Search** under the **Search** field gets you to the same place.)



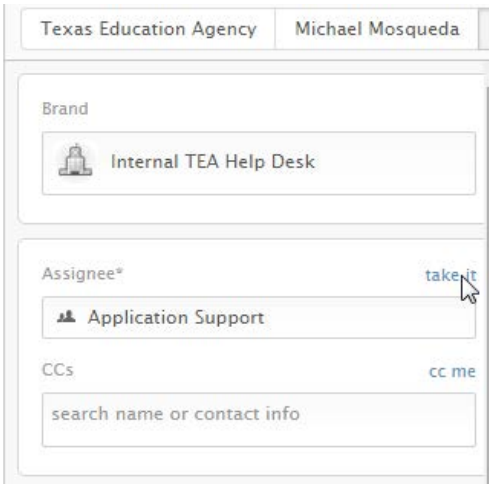

5. Select from the various filters to narrow your search:



# Claiming a Ticket

If you are a group admin or a staff agent, you can claim a ticket. Claiming a ticket lets other agents know you are reviewing it or working on it. The ticket is not updated with any changes you make until you submit it. If you close a ticket without submitting changes, it returns to its previous state.

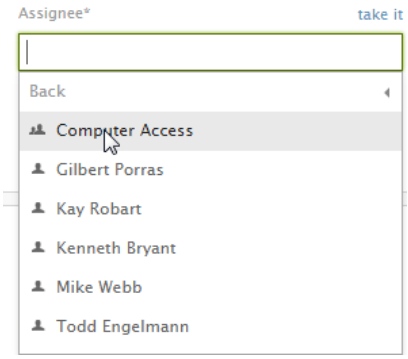
To claim a ticket to yourself, you must either open it from the dashboard or from the **Play** feature. Then, click **take it.**



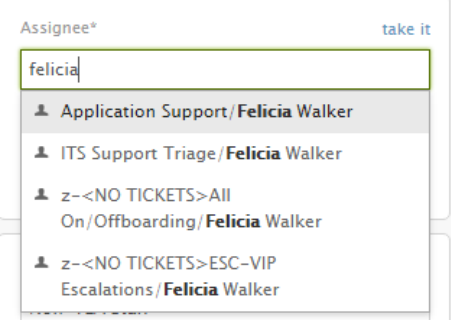

# Assigning a Ticket

Once you have a ticket open, you can easily assign it to someone else or to another group.

Under **Assignee,** select the group or agent name from the drop-down menu. If a group has several agents, it's usually best to assign the ticket to the group, such as Computer Access in the example below, so that it is available to any agent in that group.




Alternatively, to assign a ticket to a specific agent, begin typing the person's name and then select it from the resulting list.




# Working with Tickets

This section applies mostly to group admins and staff agents. Light agents cannot work tickets, but they can be copied on them and can add private notes. Depending upon the problem, there are many actions you may take to process a ticket. This section covers the most frequent of those actions.

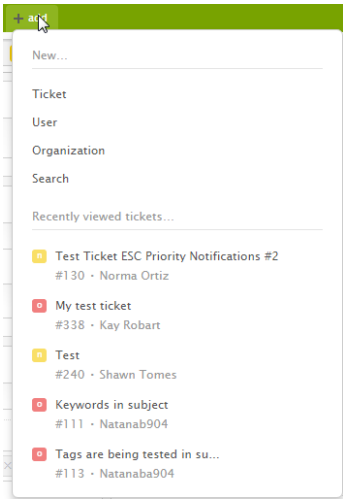
This section covers the following:

- Creating a ticket
- Copying yourself or someone else
- Adding comments or notes
- Using canned replies
- Merging tickets
- Working with suspended tickets
- Tagging tickets

# Creating a Ticket

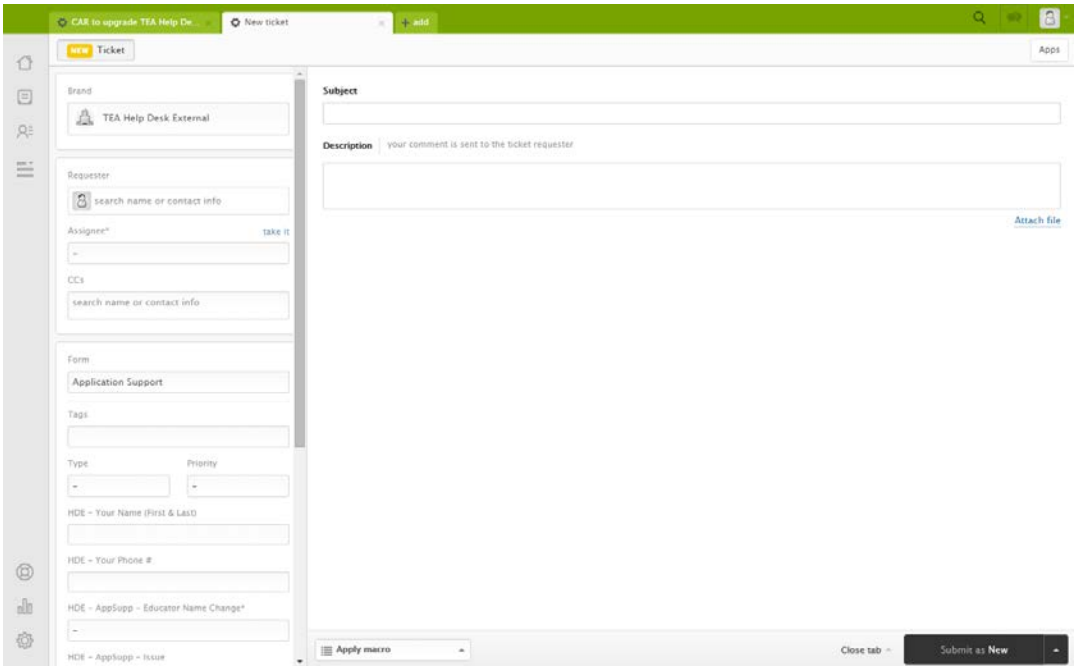
The ticket form looks different for agents than for end users. Follow these steps to create a new ticket:

1. Click **add** at the top of the page:

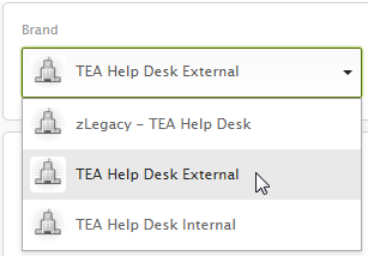



If you simply click **add,** the system opens a new ticket. Alternatively, you can select **add > New** or **add > Ticket.**

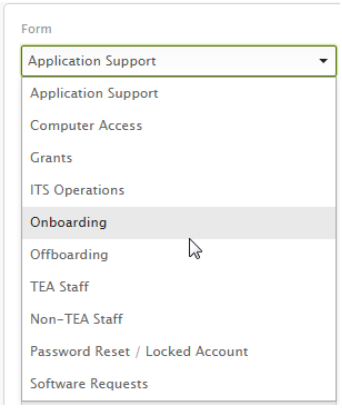
A new ticket form opens:




2. Select the ticket **Brand** (internal or external) from the pane on the left:



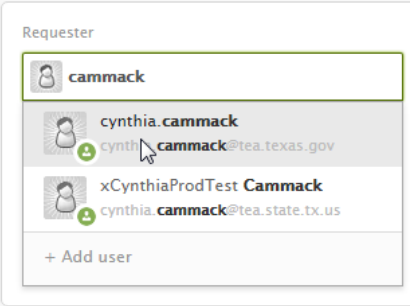

3. Select the appropriate ticket **Form,** which identifies the type of request being made. This selection changes the fields in the left pane depending upon the form selected and causes your ticket to be routed to the desired group:




4. Complete the **Subject** and **Description** fields.

5. If you wish to attach a document, click **Attach file** and browse for and attach the file.

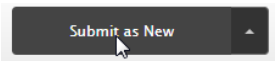
6. In most cases, you will enter your own name in the **Requester** field and then select it from the list. If you are entering a ticket for someone else, you may enter or type that person's name. However, there are separate fields for entering name and contact information below.




7. If the ticket is for you, type your name, phone number, and any other requested information. If the ticket is not for you, enter the information for the user. (Some ticket forms have space for both the requester's information and information for the person who needs help, if different.)

8. Complete any other fields in the left pane, depending upon the form type.

9. At the bottom of the page, click a status, at this point most likely **Submit as New**:




## Selecting How to Submit a Ticket

When you first submit a new ticket, you will almost always select **Submit as New.** However, at different stages of the ticket's progress, you will have to resubmit it into a different status. Be sure to change the submission status of a ticket when its state changes. This activity is important for smooth operation of the Help Desk.

- **Submit as New:** Use this default status when submitting a new ticket that has not been assigned to an agent.

- **Submit as Open:** Use this status when the ticket is being worked on by an agent.

- **Submit as Pending:** Use this status when you are waiting for the requester to reply to a message, perhaps a request for more information. When the requester replies, the ticket is re-opened. Your group may opt to have tickets automatically close after being in pending status for a specific amount of time.

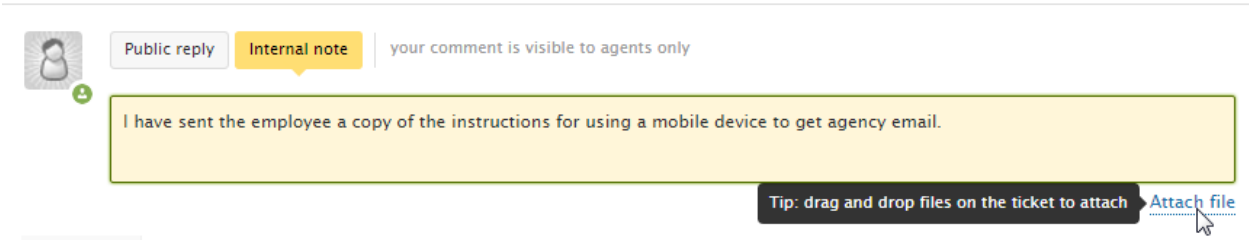
- **Submit as On-hold:** Use this status when you are waiting for a reply from a third party or you have another reason for holding the ticket, such as waiting for a specific date or time. When the requester replies, the ticket is re-opened.

- **Submit as Solved:** Use this status when you have solved the ticket. If a user replies to the ticket in Solved status, for example, to indicate the problem was misunderstood and to add more information, the ticket is re-opened.

## Attaching Files

> Attached files can be viewed only by internal users. External users are unable to view attachments in the TEA Help Desk. To provide customers instructions, consider creating a FAQ entry that you can refer them to.
>
> Although external customers cannot view attachments, they can attach items themselves, such as screenshots or completed forms, that can be opened and read by TEA staff.

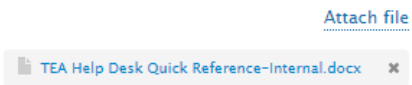
To attach a document, use the **Attach file** capability near the note function:




1. Click **Attach File.**

2. Browse for the file and click **Open.**

   The name of the file appears:



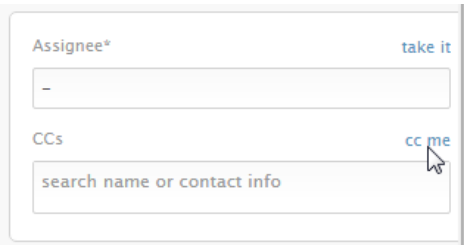
# Copying Yourself or Someone Else

Agents and Group Admins are able to copy other users on tickets. Copying users allows them to get email notifications of the updates made to tickets and see tickets under **My Activities.** All types of internal users can be copied on tickets.

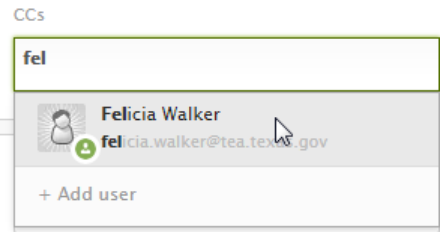
Agents can see all tickets they are CC'd on by going to their profile and, under their name, selecting **Assigned tickets** from the drop-down menu. Consider copying yourself or someone else on a ticket in these circumstances:

- To receive notifications yourself as the ticket is worked even if you are not the assignee. These notifications are convenient when you are assigning a ticket to another group or agent and want to track it after it leaves your group.
- To notify someone else of responses to the ticket, for example, a manager or other technical resource
- To see notes or comments made on the ticket

With the ticket open, you can copy yourself by clicking **cc me** above the **CCs** field.




To copy someone else, begin typing their name in the **CCs** field and select it from the drop-down menu. You can also enter an email address here, and this is the way to copy a person who is not an internal TEA user.

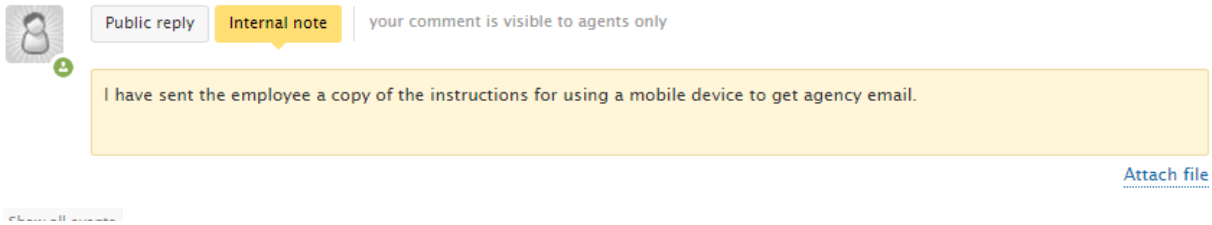



# Adding Comments or Notes

As you work the ticket, you may provide information in the **Comments** box or you may want to make a note of your actions. You can enter comments under either **Public reply** or **Internal note.**

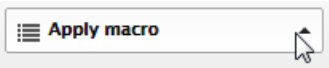
**IMPORTANT:** Comments entered under **Public reply** are viewable by the customer. Be careful with the content and wording of your message.

Internal notes are only visible to agents. To make it easier to tell the difference, internal notes are yellow while public replies are white. Light agents may add internal comments to a ticket, but they cannot make public replies.




# Using Canned Replies (Macros)

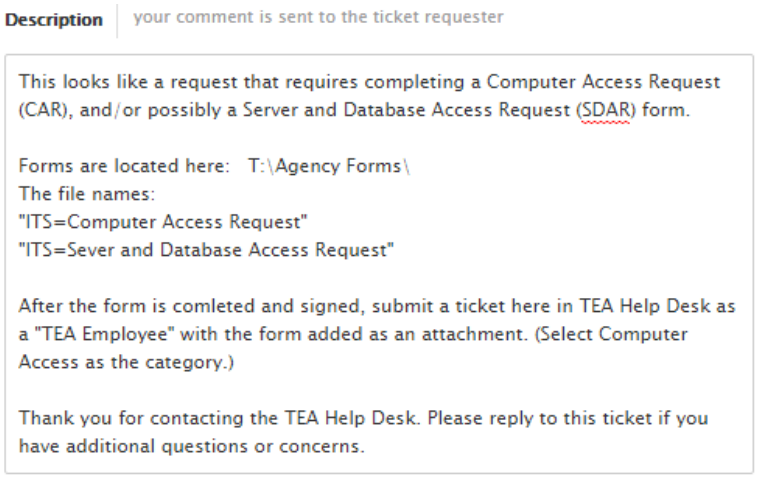
Canned replies to common requests are provided in the TEA Help Desk as macros. These macros avoid agents having to create the same text over and over again and also help ensure that responses to customers are consistent and appropriate. To apply a macro, simply click **Apply macro** at the bottom of the ticket and select the appropriate macro from the list:




If your group has a large number of macros, you can search for a desired macro by entering keywords.

For instructions on how to create a macro, see the section “Creating and Editing Canned Replies.”

The text for the macro appears in the ticket:




**Note**: You can edit the text as needed for the specific situation. The macro is sent when you click the status button at the lower right.

# Merging Tickets

If there are duplicate tickets for the same problem and you only work one of them, you may be duplicating work or even undoing a fix that is already in place. Merging tickets allows you to combine the tickets so that this is less likely to happen. It also cuts down on any possible confusion the Requester may have if receiving multiple answers.

The following rules apply to merge tickets:

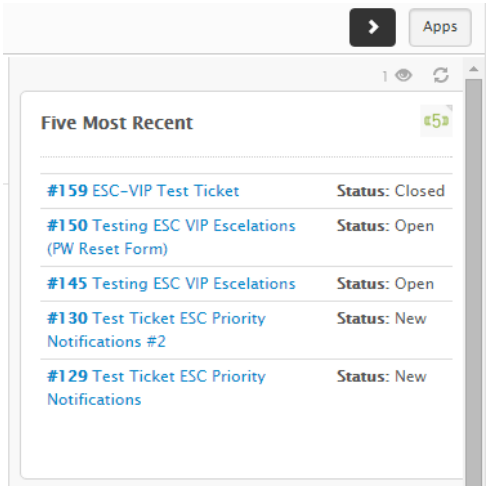
- Tickets must be in some status other than **Solved.** However, you may merge an unsolved ticket into a solved ticket. Doing so will not reopen the solved ticket.
- Ticket CC's may or may not be enabled. If ticket CCs are enabled:
    - You can merge two tickets with different requesters. The requester of the ticket you close with the merge is added as a CC to the new ticket.
    - Anyone CCed on the original ticket is also added as a CC on the merged ticket.

  *If ticket CC's are not enabled,* you can merge two tickets only if they are from the same requester.
- The most recent public comment from the ticket being closed with the merge appears in the new ticket's comment thread with a link to the closed text, where you can review the previous comments. No other comments appear directly in the ticket.

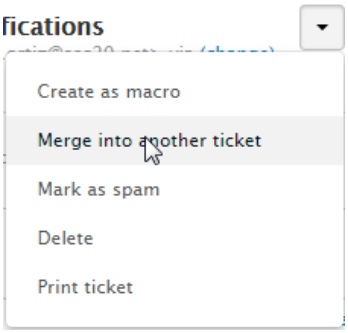
- Ticket fields (tags, type, priority, status) are not carried over from the ticket being closed with the merge. Only fields that are filled out in the new ticket are saved.
- Merges are permanent and cannot be undone.

Follow these steps to merge tickets:

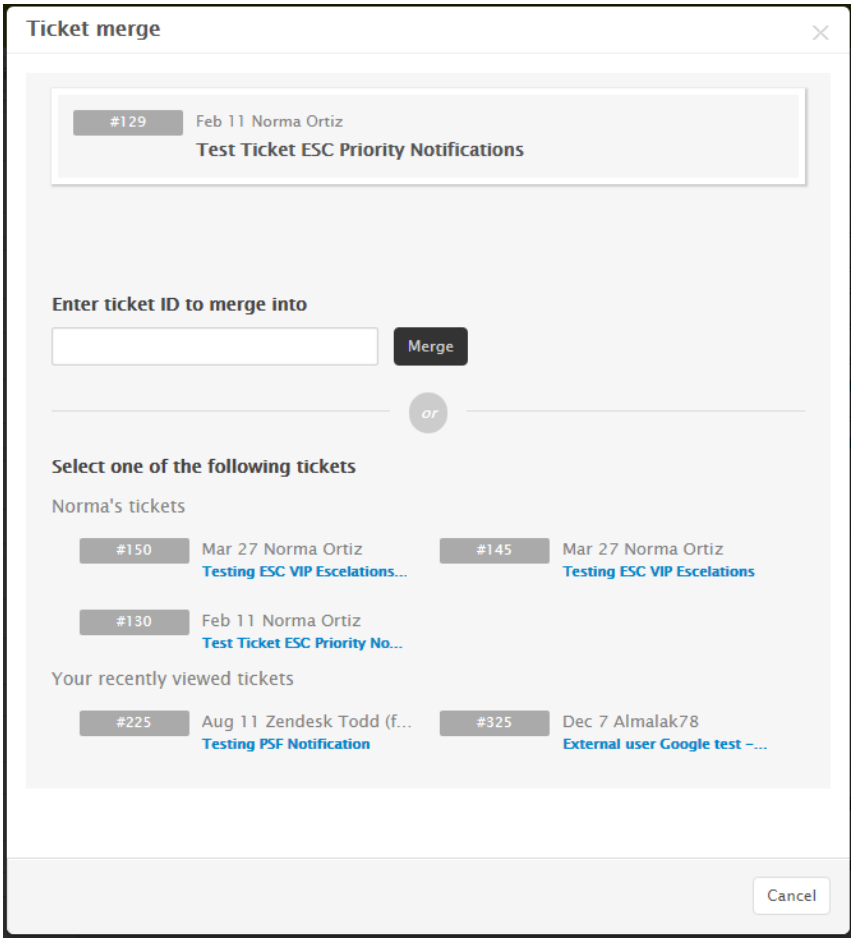
1. Open one of the tickets.
2. Make sure that the **Apps** button is active. The **Apps** button shows the last five tickets the requester has submitted.




3. Click the drop-down arrow next to the ticket name and select **Merge into another ticket:**



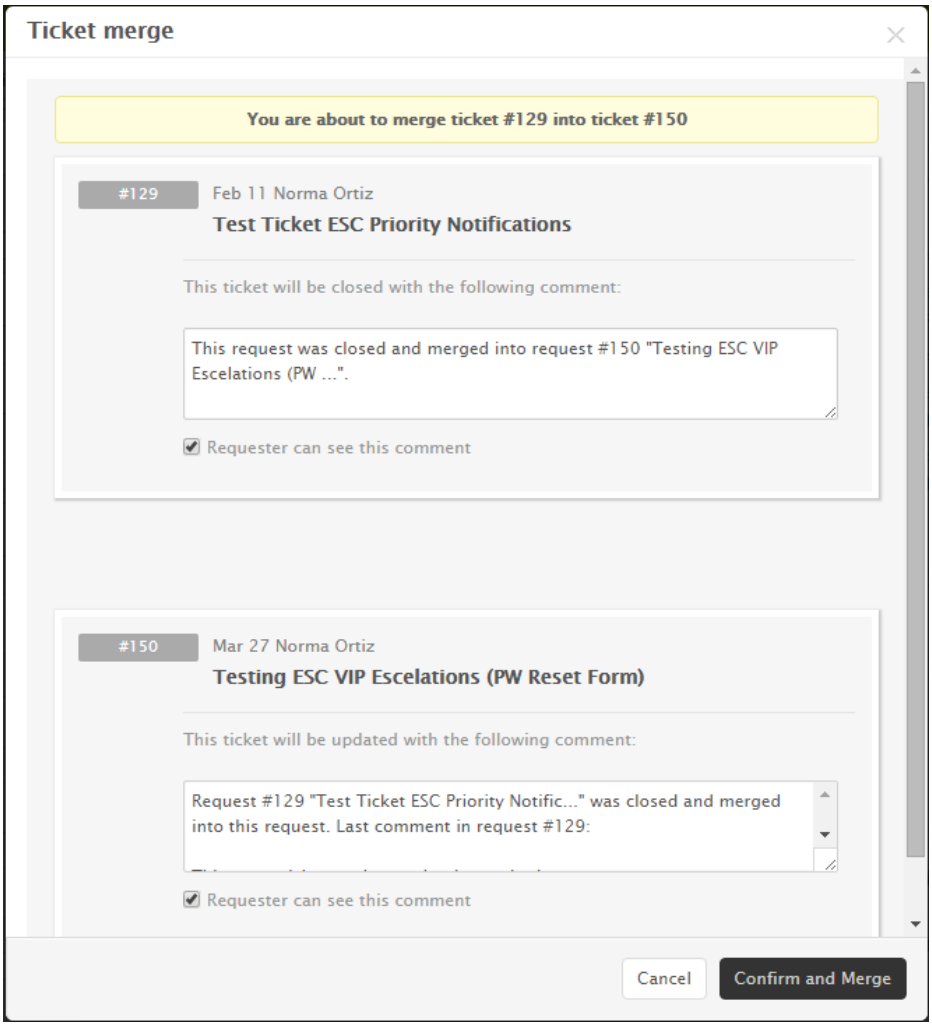
The Merge dialog box opens:




The first ticket listed is the open ticket.

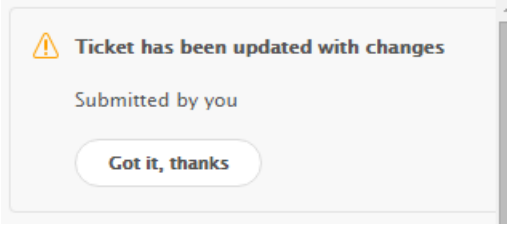
4. Under **Select one of the following tickets,** click the title of the ticket. Alternatively, or if the ticket to be merged does not appear, type its ID into **Enter ticket ID to merge into** and click **Merge**. This is the method to use when merging an open ticket with a solved ticket.

5. Both tickets now appear in the Ticket merge dialogue box. Uncheck the **Requester can see this comment box** in both places, because it causes confusion for the customers.




6. If these are the tickets to be merged, click **Confirm and Merge.**

7. After the merge, a blue-gray box appears at the top left that says **Ticket has been updated with changes.** Click **Got it, thanks** to confirm the change.

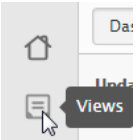



Now you can work the ticket as usual.

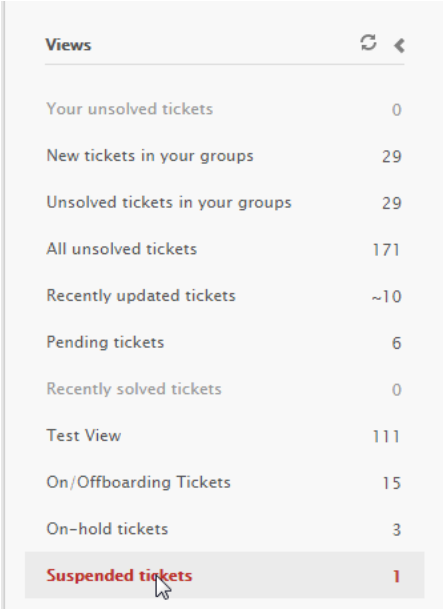
# Working with Suspended Tickets

Group Admins are able to view and work suspended tickets. A ticket is automatically suspended if a response to the ticket is undeliverable. You can recover a ticket if you subsequently get a good email address from the recipient, or if you can correct an obvious misspelling or missed letter in the email address. It is recommended that Group Admins review this queue periodically and delete older items.

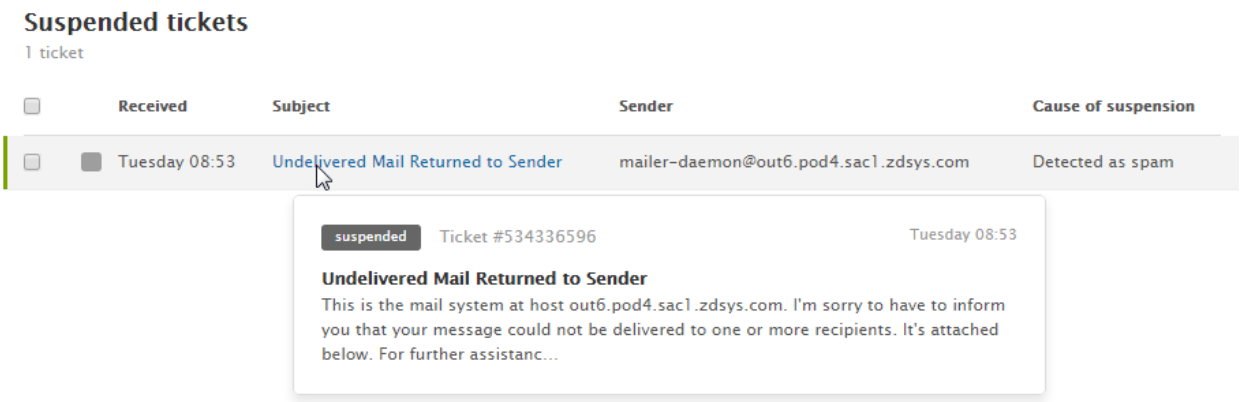
1. Find the ticket by clicking the Views icon:




2. In the list of views, click **Suspended tickets:**

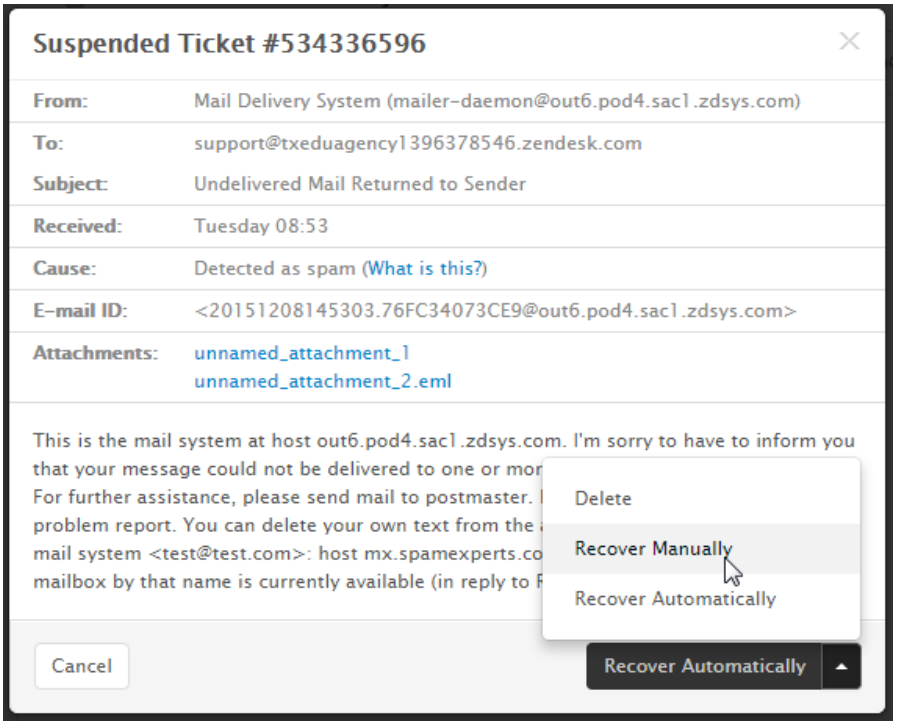



3. The list of suspended tickets appears on the right. Click the ticket's title:

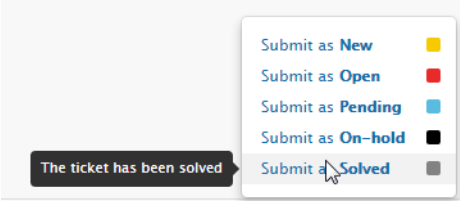



This example is spam, so you would obviously not want to reopen it, but let's continue with this example anyway.

4. The Suspended Ticket dialog box opens. Click the button at the bottom of the box and decide whether to recover the ticket automatically, recover it manually, or delete it.



5. If you recover it manually, you must choose how to submit it.

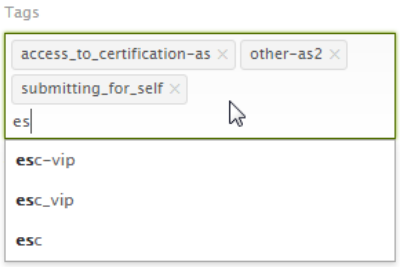



You can then work the ticket or reassign it to another agent.

# Tagging Tickets

Assigning keywords, or tags, to tickets allows the ticket to be searched for by those criteria. Some tags, such as VIP tags, cause tickets to be prioritized or to appear in a certain way. Only use tags when you are certain of the action that will be applied. The system assigns some tags automatically to tickets.

1. Under **Tags,** begin typing the tag. A menu appears listing all the existing tags that match what you have typed:



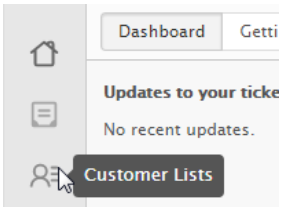

2. Select the corresponding tag:

To make a new tag, just type it into the **Tags** field. Only create tags if you are certain of the action they will apply. You can request tag functionality be created for you by contacting the area that administers the TEA Help Desk.

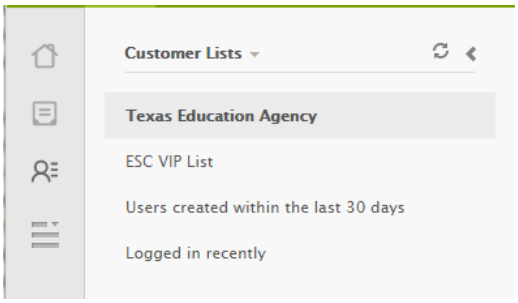
# Viewing the VIP List

All agents can view their group's VIPs. VIPs in TEA Help Desk are users who have been identified as having high-priority issues. Their tickets are automatically escalated to the head of the queue, with notifications sent to key agents at intervals when the ticket is open. Each program area has the option to work with TEA Help Desk staff to set up a VIP list if needed. View the VIP customer list as follows:

1. Click the Customer Lists icon:




   The list of Customer Lists appears in the panel on the left:




2. Click the VIP list you would like to view. The list of VIP users appears. You can export this list as a CSV file for Excel.

> **Note**: If you need to request a change to the VIP list or add a VIP user, you must do that through your Group Admin. Group Admins work with TEA Help Desk staff to maintain VIP lists.

# Creating and Editing Canned Replies (Macros)

Only Group Admins and Staff Agents can create or edit macros. Canned replies, or macros, are pre-formulated instructions or comments that are appropriate for a large number of tickets, such as instructions for resetting a password. These macros allow agents to avoid typing the same response over and over. Instead, they can just select an existing macro. (See "Using Canned Replies" for instructions.) Macros also ensure consistency and appropriateness across responses, since macros can be written and reviewed in advance. Administrators can create new macros for their groups or edit the existing ones and deactivate or delete macros.

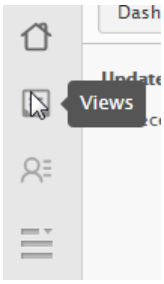
# Process for Macros

> It is crucial to keep in mind that canned replies represent the agency to the public. They are viewed by internal users and often by the general public, potentially hundreds or thousands of times each, sent via email notifications that can be forwarded to others. You must follow the policy your division follows for writing and reviewing messaging for the internal or external customers that your group serves.

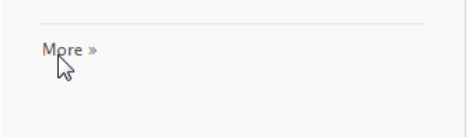
Keep your audience in mind when wording your reply. After the content of the message is approved by the appropriate authority in your division (usually your division director or the business owner of the associated application), submit the request for a macro to your group administrator. The group administrator can either construct the macro, or if something more complicated is required, email the request to teahelpdesk@tea.texas.gov. Help desk staff will assist you.

# Accessing Macros

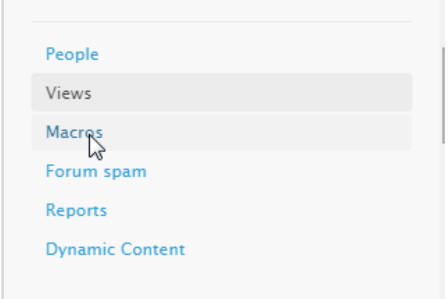
1. Select the Views icon:



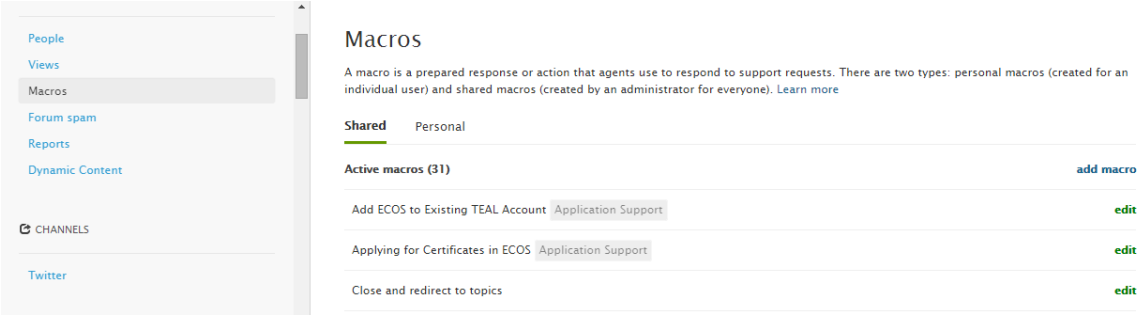
2. At the bottom of the left pane, select **More.**




3. Click **Macros:**



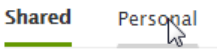

The list of macros appears:



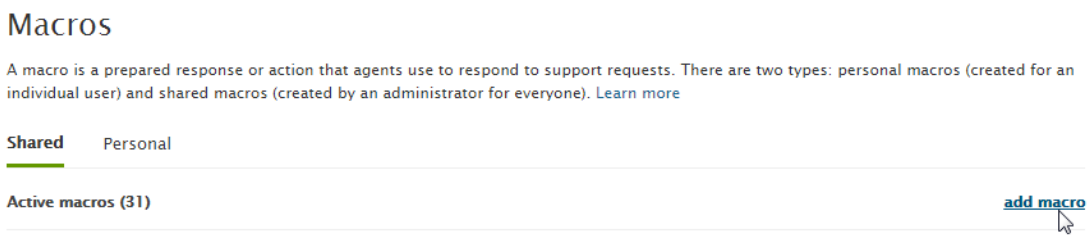

# Creating Macros

The Group Admin enters macros for the program area. You can create a macro from scratch, or you can clone a similar one and edit it. This section explains how to create one from scratch.

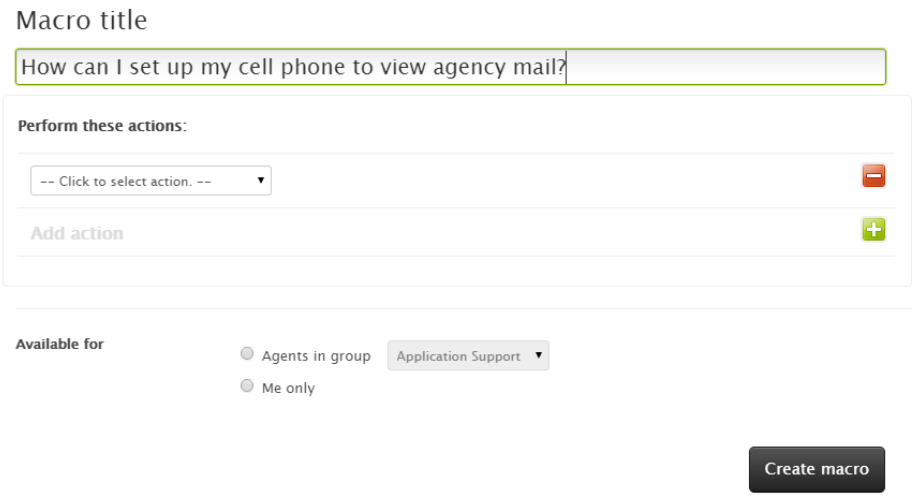
1. Since you are creating macros for the group, it's usually appropriate to leave this setting at **Shared.** To create a personal macro, click **Personal.**



2. On the Macros page, click **add macro:**

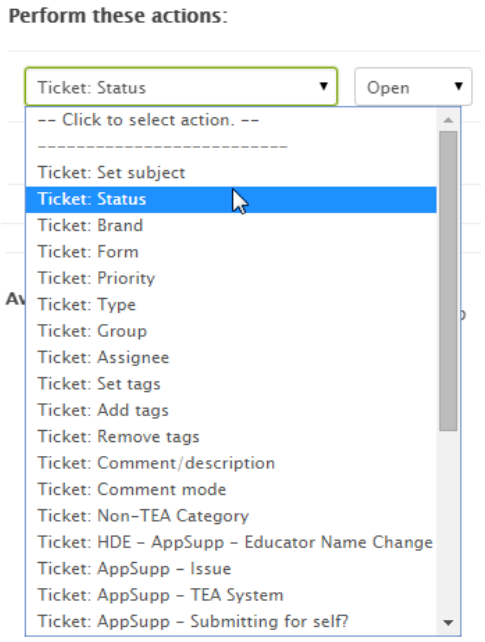



3. Type a title for the macro:




Unless you enter an alternate title as an additional action (see below), the macro title appears to the user as the subject line in the emailed reply.

4. Select an **Action** for the macro. For example, **Ticket: Status** is a common choice:




5. Select the attributes for this action. For example, if I set **Ticket: Status** to **Solved,** the ticket status is set to solved as soon as an agent replies using this macro. The user can reopen the ticket by replying to it, but if the user does not reply, the ticket remains solved.

6. Continue to select **Actions** and attributes for the actions by clicking the green plus sign. Some common ones you will want to use are the following:

   - **Ticket: Group:** selects the group that the macro applies to
   - **Ticket: Type:** shows the type of request
   - **Ticket: Comment mode:** determines who can view the comment (public or private)
   - **Ticket: Comment description:** provides a text field for you to type your message

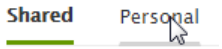
7. For **Available for,** select **Agents in group** or **Me only.** If you select **Agents in group,** select the group.

8. Click **Create Macro.**

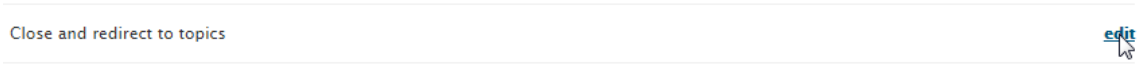
# Editing Macros

To edit a macro, follow these instructions:

1. View the list of macros, as instructed in the previous section.
2. To edit a personal macro, click **Personal.** Otherwise, leave the selection at **Shared.**




3. Click the **edit** button for the macro:

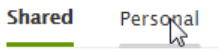



4. Edit the ticket as needed.
5. Click **Submit.**

# Deactivating a Macro

Deactivating a macro removes it from view but does not delete it. Follow these steps to deactivate a macro.

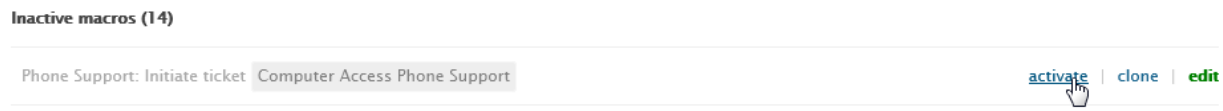
1. View the list of macros, as instructed above.
2. To deactivate a personal macro, click **Personal.** Otherwise, leave the selection at **Shared.**




3. For the macro you wish to deactivate, hover your mouse next to the **edit** link. The words deactivate and clone appear. Click deactivate:

## Reactivating a Macro

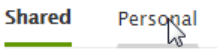
To reactivate a macro, find it at the bottom of the list of macros and hover your mouse over it, then click **activate.**



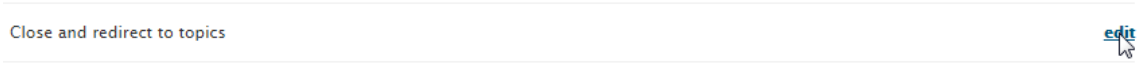

## Deleting a Macro

Follow these steps to delete a macro:

1. View the list of macros, as instructed in the previous section.
2. To edit a personal macro, click **Personal.** Otherwise, leave the selection at **Shared.**




3. Click the **edit** button for the macro:




4. At the bottom of the page, change the **Update** menu to **Delete.**
5. Click **Submit.**

# Creating and Managing Views

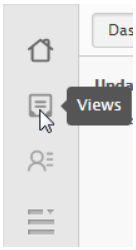
The Views page provides a way to query for and look quickly at all of the tickets that fall into a specific category or meet specific shared criteria. You can create personal views or ask your Group Admin to set up new group views, if desired. See “Viewing Your Unsolved Tickets and Other Categories of Tickets” for more information on using views. This section provides instructions for

- Creating new views
- Editing existing views
- Deactivating or deleting views

## Creating a View

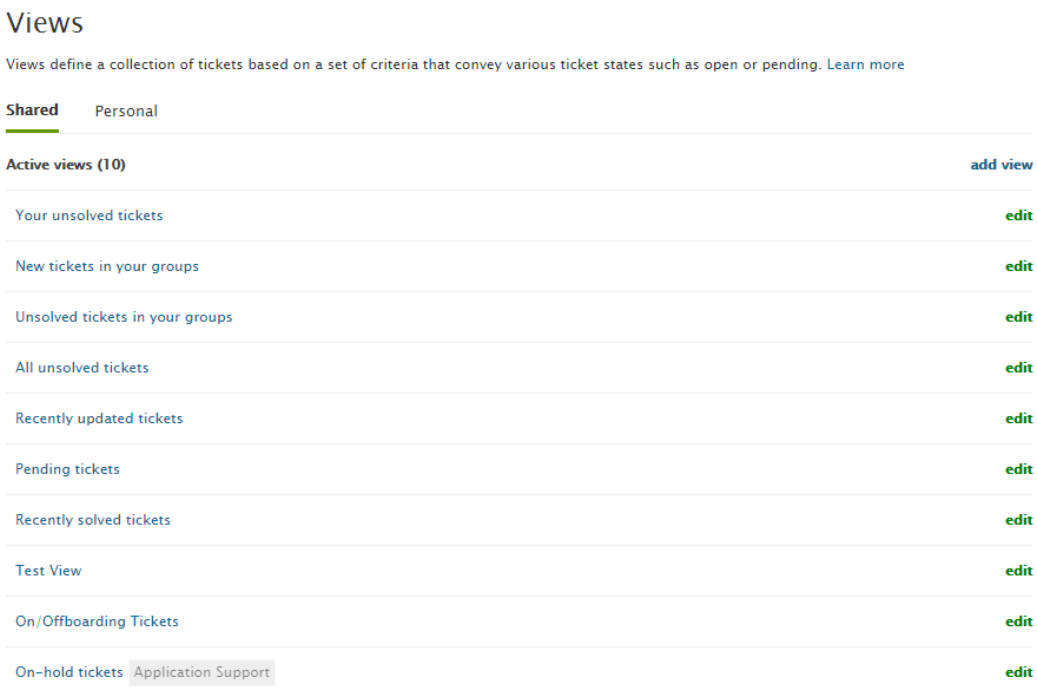
Follow these instructions to create a view:

1. Click the Views icon:

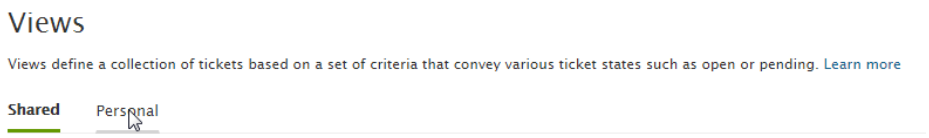



2. At the bottom of the left pane, click **More:**

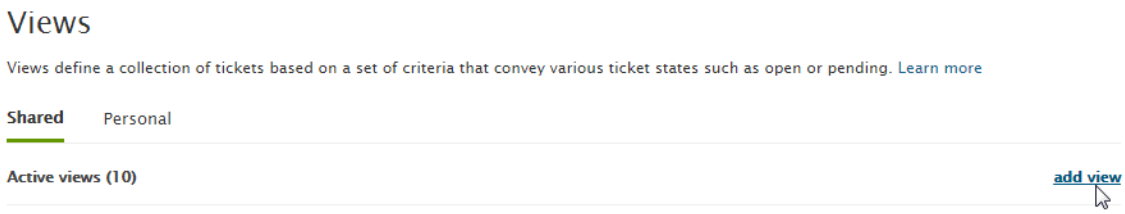
The Views page appears in the right pane:



3. If you are a Group Admin creating a view for your entire group to use, leave the selection at **Shared.** If you want to create a personal view, click **Personal:**

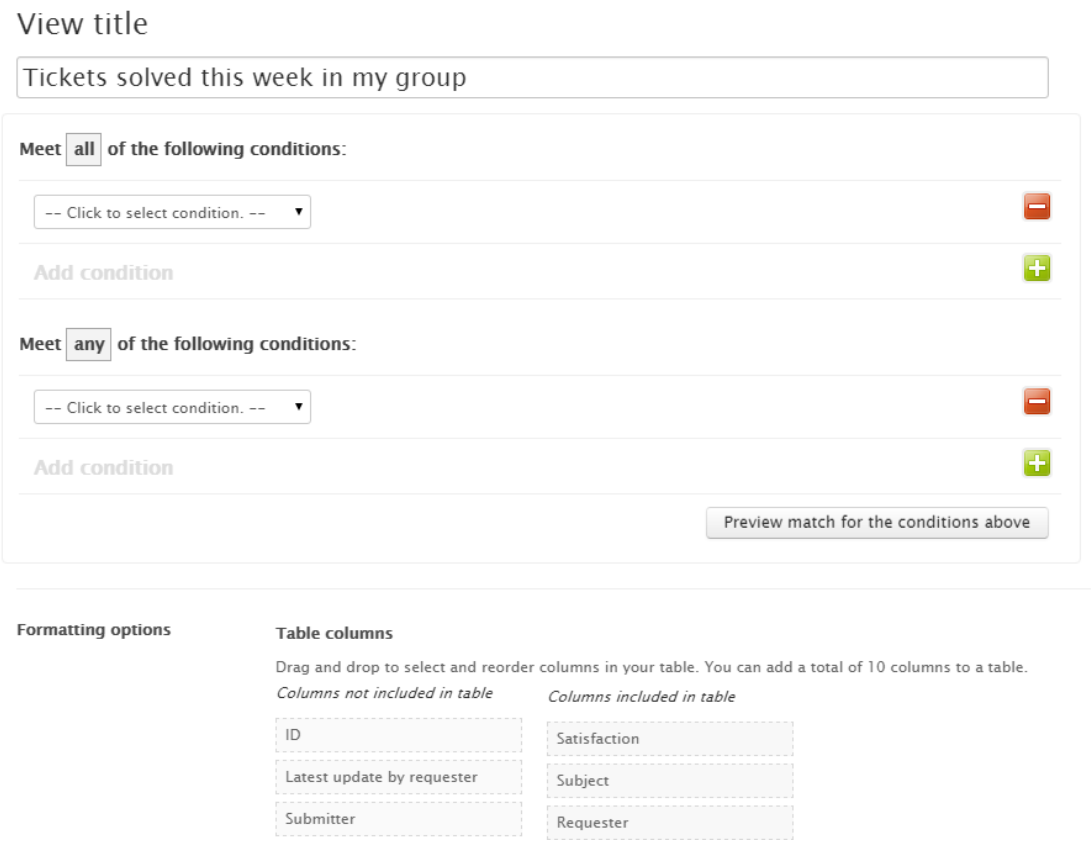



4. Click **add view:**

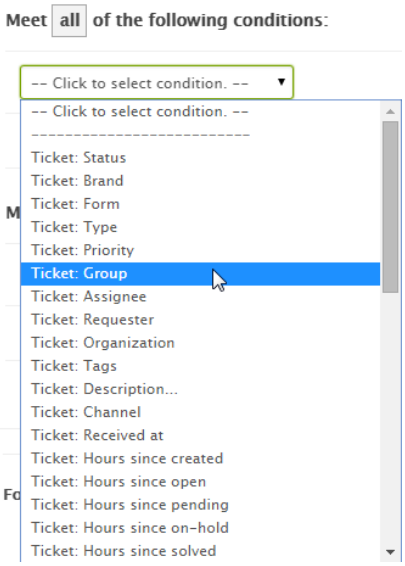



The View creation page appears.

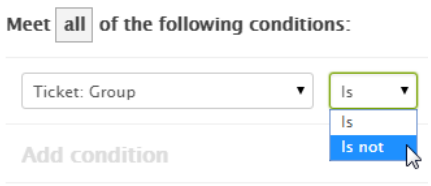
5. Type a title for your view:



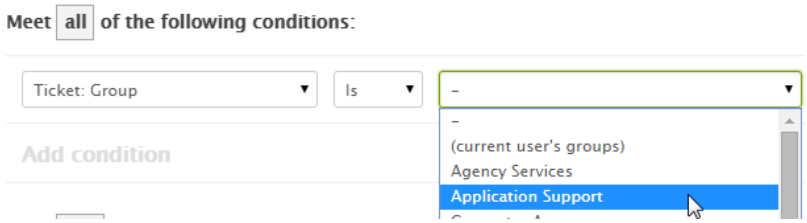
6. Begin adding conditions under either **Meet all of the following conditions** or **Meet any of the following conditions. Meet all of the following conditions** will construct a more exclusive view than **Meet any of the following conditions.** Select a condition:



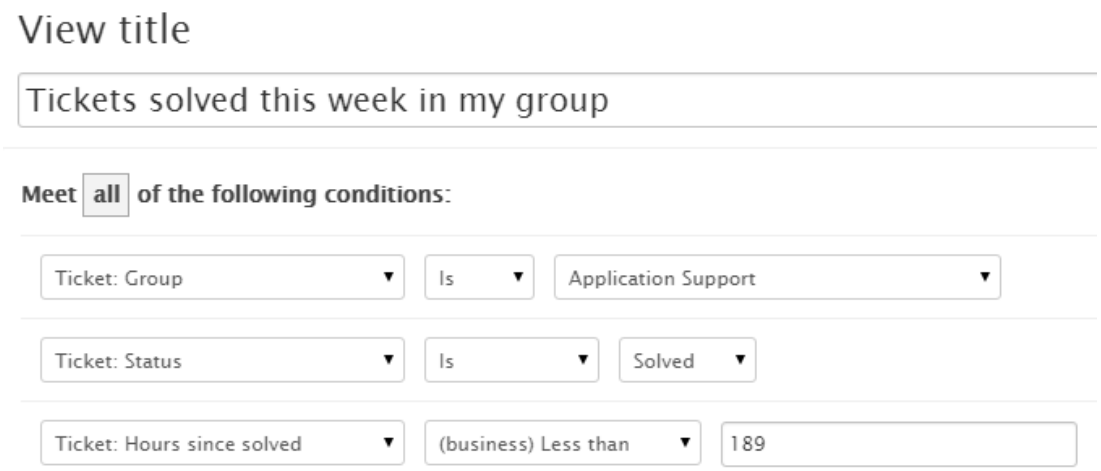

7. If you want to find all of the items that do not meet the condition, change the middle menu to **Is not.** Otherwise, leave it set to **Is:**



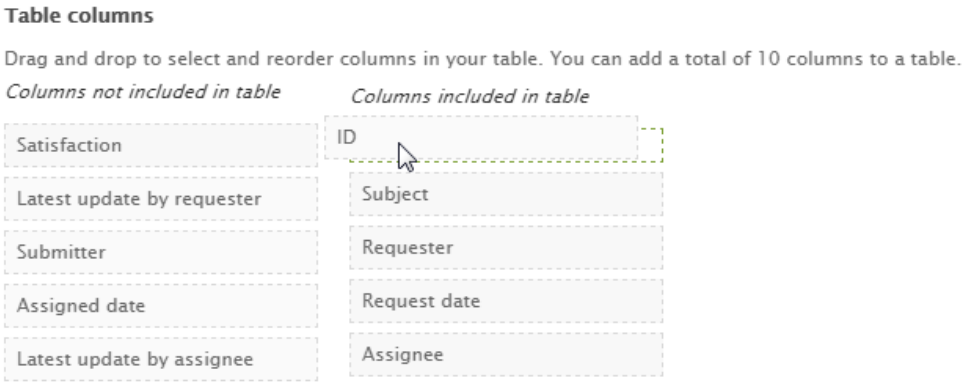

8. Select the desired state for the condition:



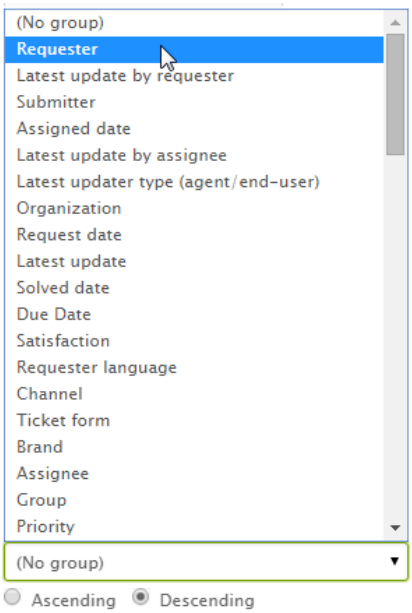
9. Click the green plus sign to add more conditions, and construct them as explained in steps 5 through 7. Below is an example of a set of conditions to produce a view of solved tickets for the Application Support group in the last seven days:




10. In the next section, drag column names from the left side to the right side and back to determine which columns will appear in the view and in what order:



11. If you wish to group the tickets in some way, select the grouping from the **Group by** menu:

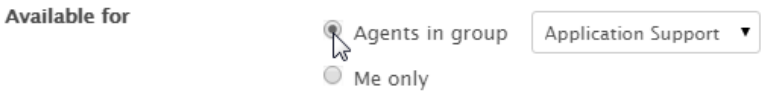



12. Change the order from **Descending** to **Ascending**, if desired.

13. To change the order of the list, select another column from the **Order by** list.

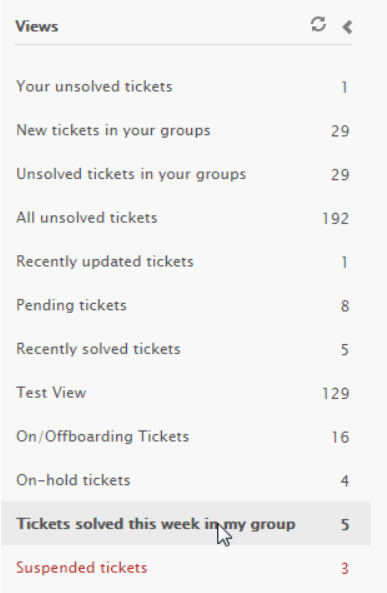
14. Change the order from **Descending** to **Ascending**, if desired.

15. Select who should be able to see this View, you or the agents in your group:




16. When you have made all your selections, click **Create view.** A link to the view appears at the top of the page with a success message:

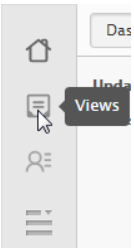
The view also appears in your list of views:




# Editing a View

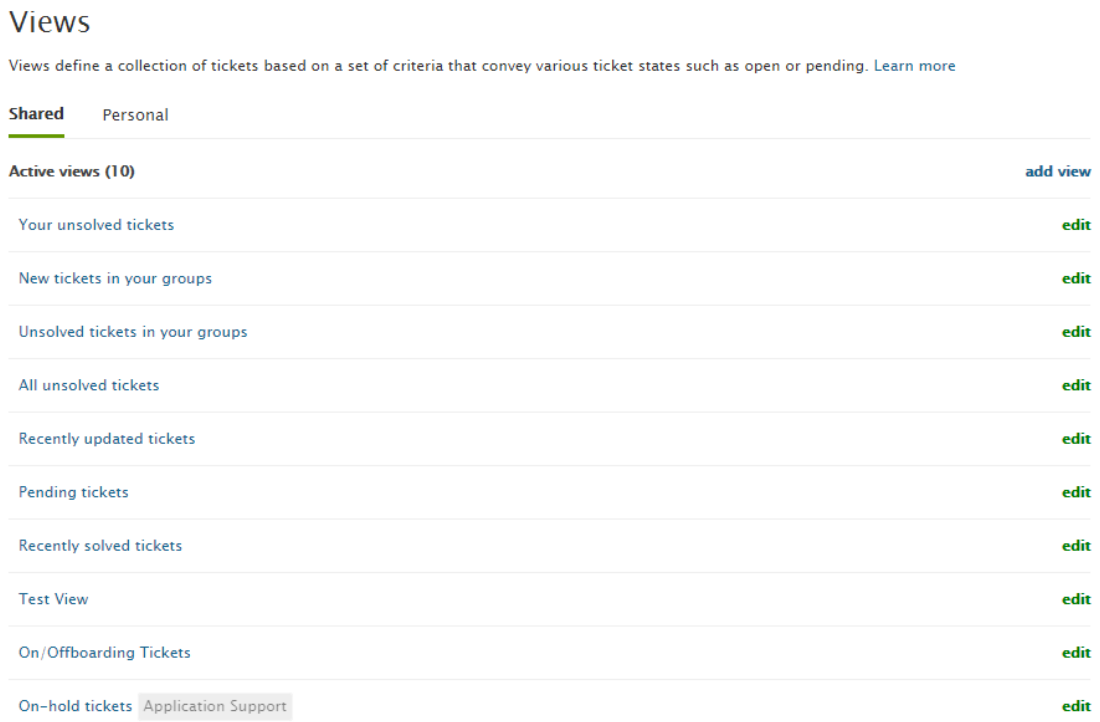
Most users can only edit personal views or views they created themselves. Follow these instructions to edit a view:

1. Click the Views icon:

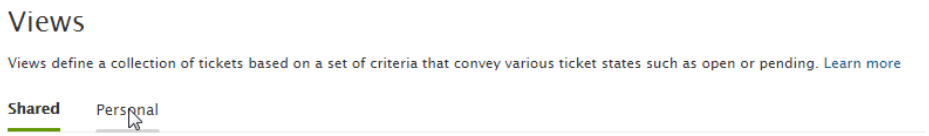



2. At the bottom of the left pane, click **More:**

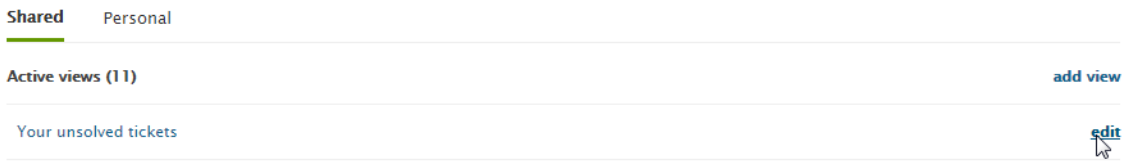
The Views page appears in the right pane:




17. If you want to edit a personal view, click **Personal:**




3. Click **edit** for the view you wish to edit:



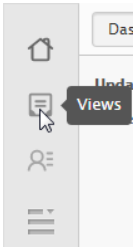

4. Make any changes needed.

5. Click **Submit** to submit the changes.

# Deactivating or Deleting a View

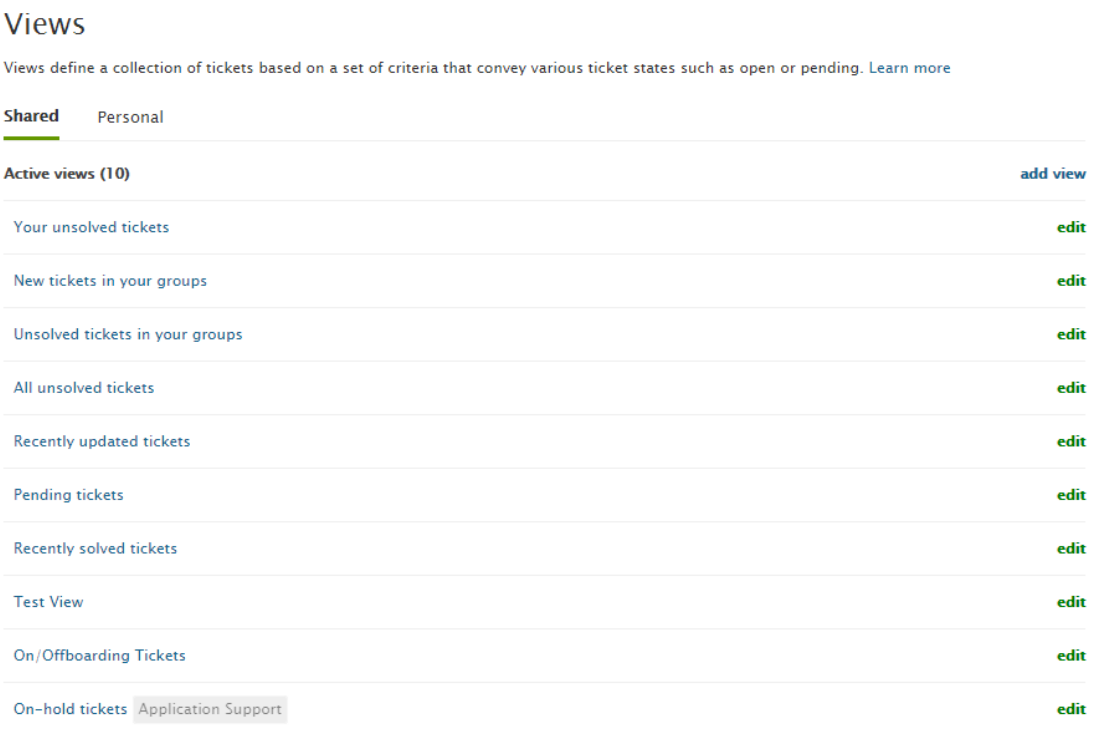
Deactivating a view doesn't remove it permanently, but it makes it inactive until you reactive it. Deleting a view deletes it permanently. Generally, you can only deactivate or delete views you've created or personal views:

1. Click the Views icon:

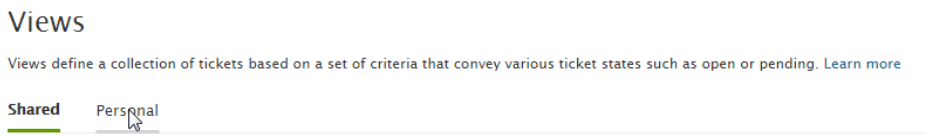



2. At the bottom of the left pane, click **More:**

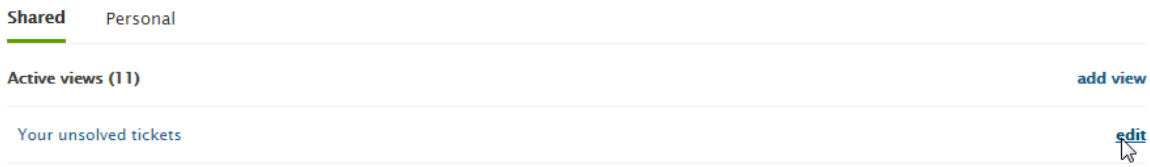
The Views page appears in the right pane:



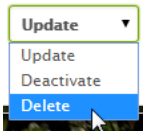

3. If you want to deactivate or delete a personal view, click **Personal:**




4. Click **edit** for the view you wish to deactivate or delete:




5. Scroll to the bottom of the page. Click the **Update** menu and change it to **Deactivate** or **Delete:**




6. Click **Submit.**

Deactivated views appear at the bottom of the list of views.

# Reactivating a View

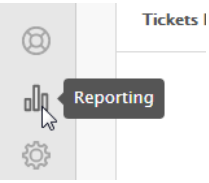
To reactivate a view, find it at the bottom of the list, hover a mouse over it, and select **activate.**

# Viewing Reports

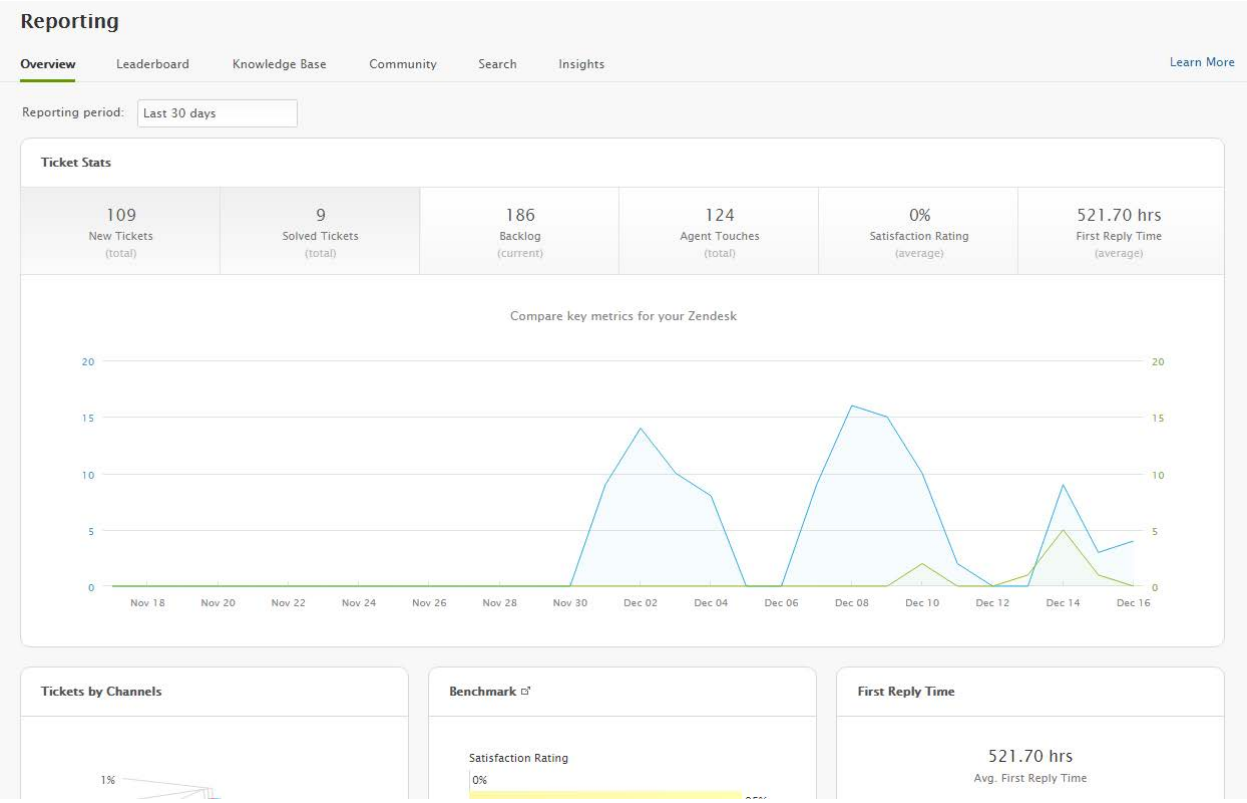
Agents and Group Admins can view reports that are already set up. You can view reports that show statistics about the use of the Help Desk and agent responsiveness.

For instructions on creating reports, see “Creating and Editing Reports” later in this document.

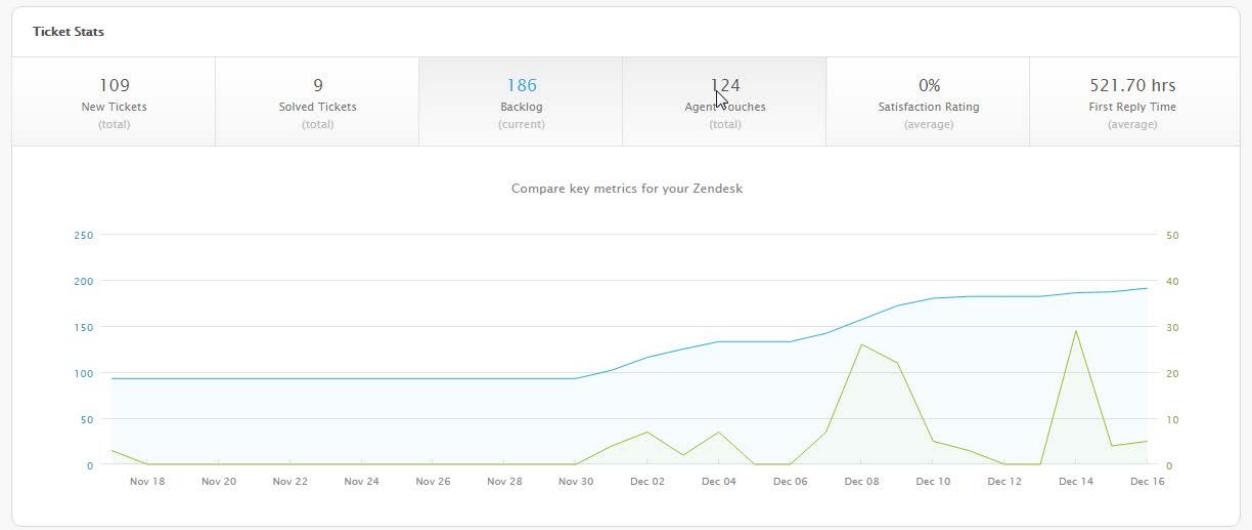
Click the Reporting icon:




The Reporting page shows you reports in the following categories: Overview, Leaderboard, Knowledge Base, Community, Search, and Insights:

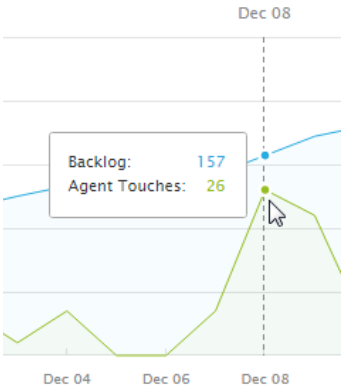


On the Overview report, click on any of the Ticket Stats to see the report for that stat:

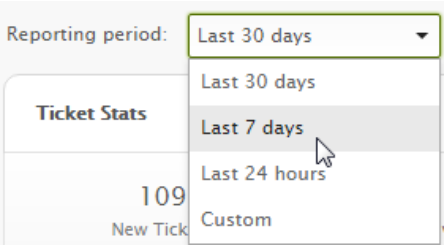



The example above is showing the number of backlogged tickets in blue and the number of agent touches in green.

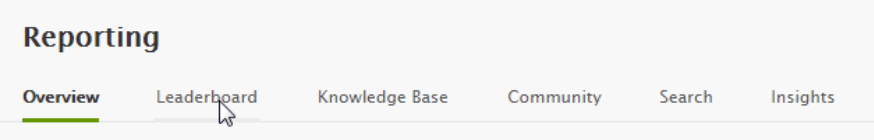
You can hover the mouse over any part of the chart to see the statistics:




You can also change the reporting period shown by selecting another one from the menu:




You can change the type of reports to view by selecting the report type at the top of the page:



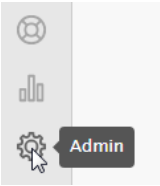

# Creating and Editing Reports

Group Admins can create new reports in addition to the ones provided and edit existing reports, as needed. See “Viewing Reports” to see information about the provided reports.

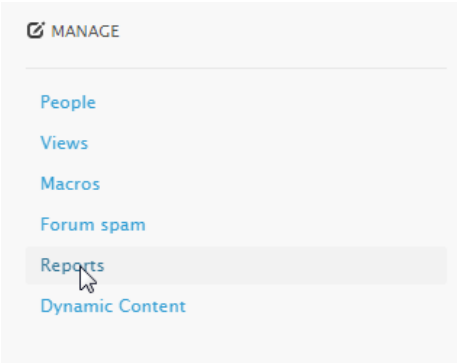
## Creating a Report

Follow these steps to create a report:

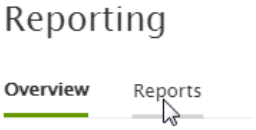
1. Click the Settings icon:



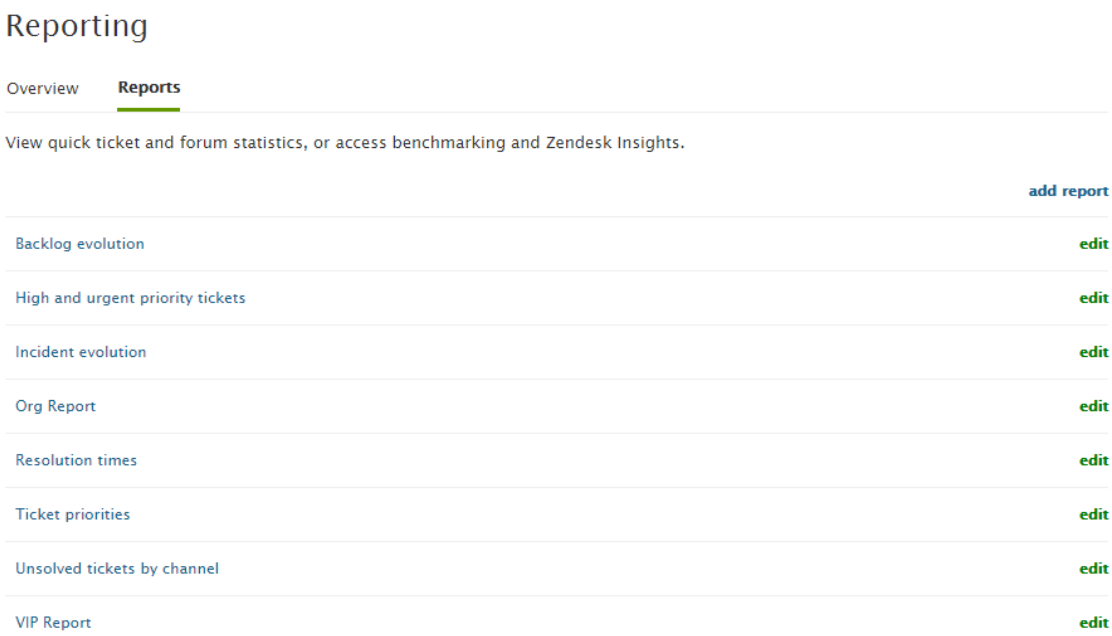

2. Click **Reports** in the left pane:



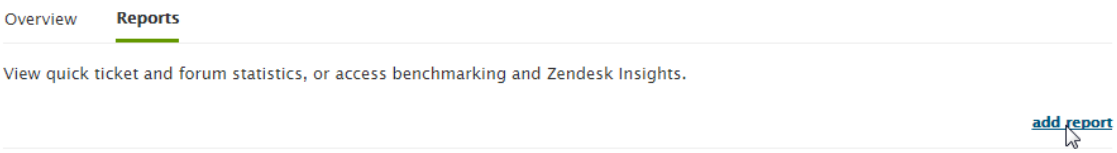

3. Click **Reports** on the Reporting page:



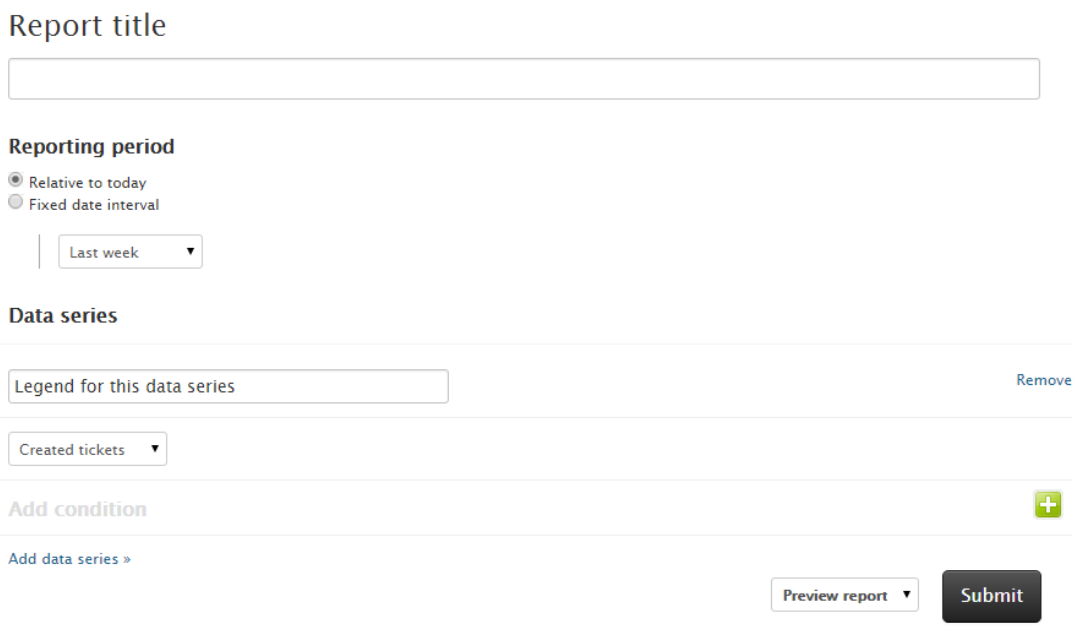
The Report page shows the existing reports:



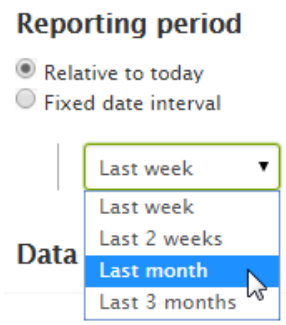

4. Click **add report:**



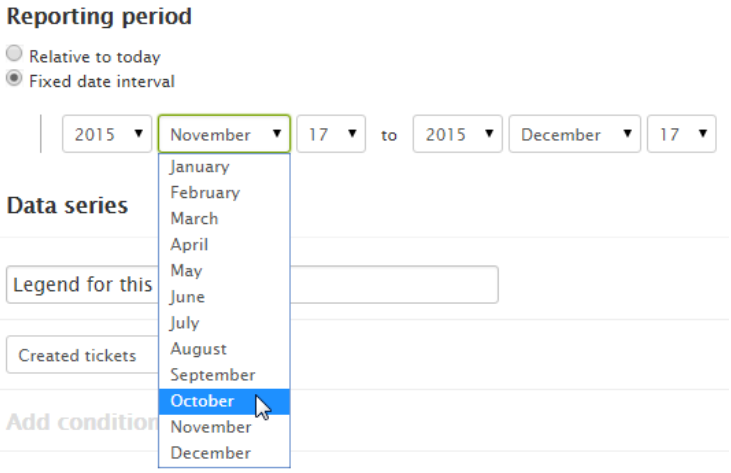
The Report creation page appears:




5. Type a title for the report.
6. Pick a **Reporting period:**
    - If you pick **Relative to today,** pick the period from the menu:

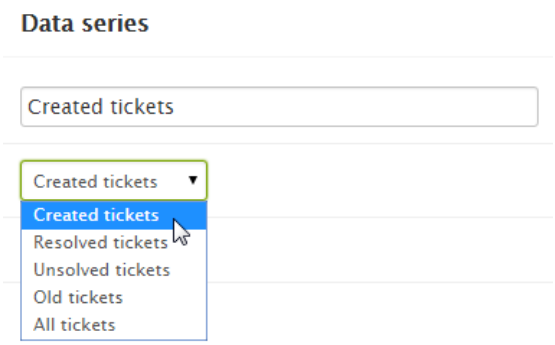


- If you pick **Fixed date interval,** pick a beginning and end date:



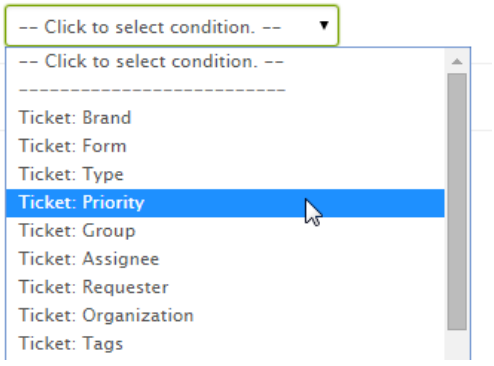

7. Type a legend for the data series, or pick **Remove** to remove the legend.

8. Select the type of tickets to report on:



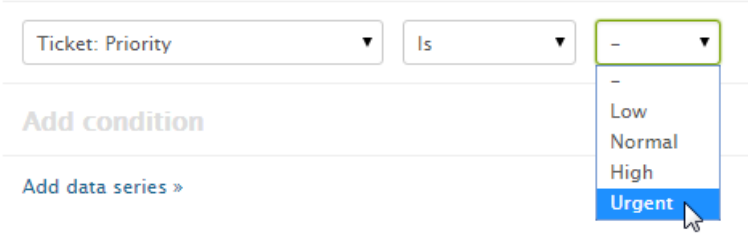

9. If you want to specify a condition, click the green plus side to add one.

10. Select the condition from the menu:




11. If you want to find tickets that do not meet the condition, select **Is not** from the middle menu. Otherwise, leave it as **Is.**

12. If you selected a condition, select a setting for that condition:

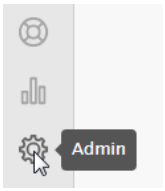



13. Repeat steps 9 to 11 to add conditions as needed.
14. To add another data series, repeat from step 7.
15. Preview the report by clicking **Preview report** and then **Submit.**
16. To submit the report, click **Create report** and then **Submit.**

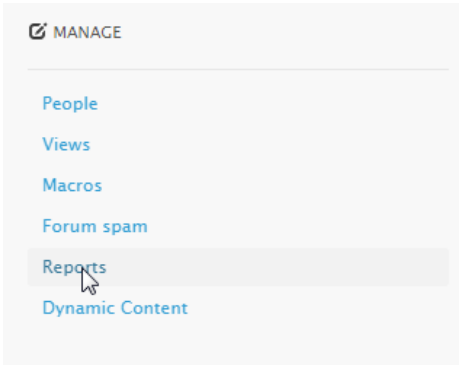
# Editing a Report

Follow these steps to edit an existing report:

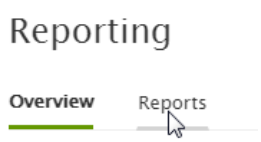
1. Click the Admin icon:



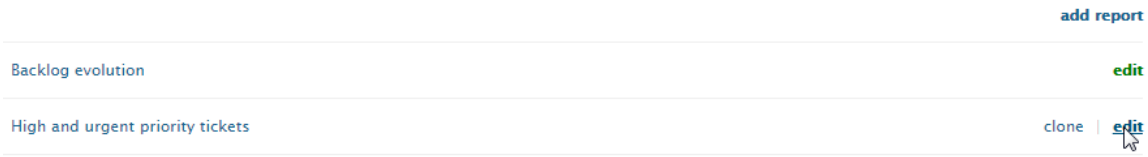

2. Click **Reports** in the left pane:




3. Click **Reports** on the Reporting page:




4. Click edit for the report you wish to edit:




> **Note**: An alternative to creating a report from scratch is to clone it, edit it, and rename it. Note the **clone** control on the image above.

5. Edit the report as needed.
6. Preview the report by clicking **Preview report** and then **Submit.**
7. To submit the report, click **Create report** and then **Submit.**

# Creating and Managing FAQs

Work with your Group Admin or TEA Help Desk staff to publish FAQs for your area.

> FAQs are viewed by internal users or by the general public, depending on the scope of your group activities in the TEA Help Desk. FAQs are representative of the agency, so errors or unfortunate word choice can have widespread impact for you, your group, and the agency.

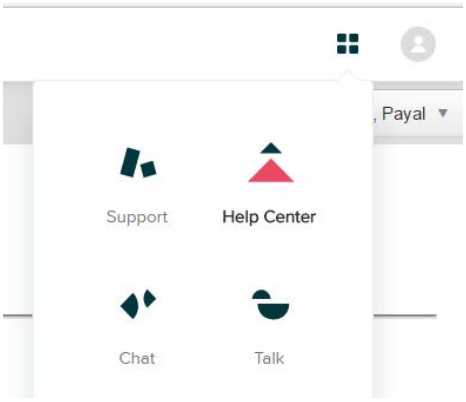
You must follow the policy your division follows for writing and reviewing messaging for the intended audience, internal or external public readers. Work with your Group Admin on the wording and development of the FAQ. Be sure to follow the same accessibility guidelines used for other web postings. After the content of the FAQ is approved by the appropriate authority in your division (usually your division director or the business owner of the associated application), your group administrator will add it to the TEA Help Desk. For assistance, email the request to teahelpdesk@tea.texas.gov.

This guide contains an appendix that explains the guidelines and provides a template for creating FAQs. Please consult this appendix before publishing your FAQ.

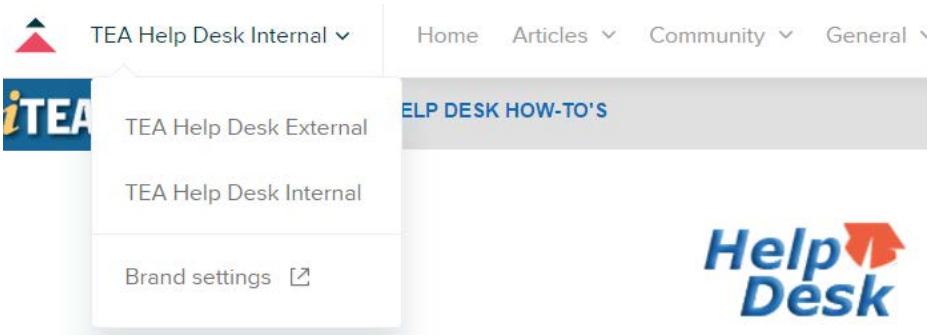
# Creating a FAQ

Group Admins are responsible for creating FAQs in the TEA Help Desk. Follow these instructions to create a FAQ:

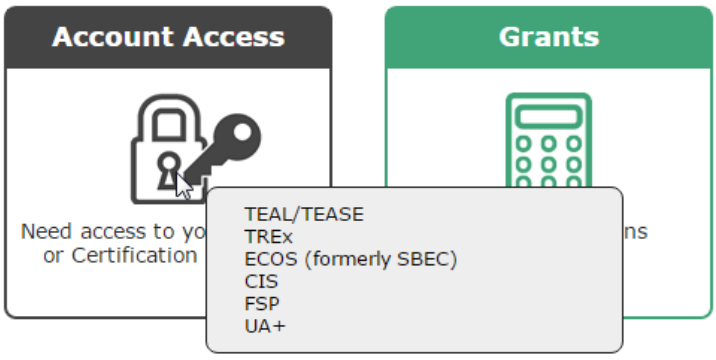
1. From the Dashboard, click the “Zendesk Product” Icon on the top right corner and then click on “Help Center”:



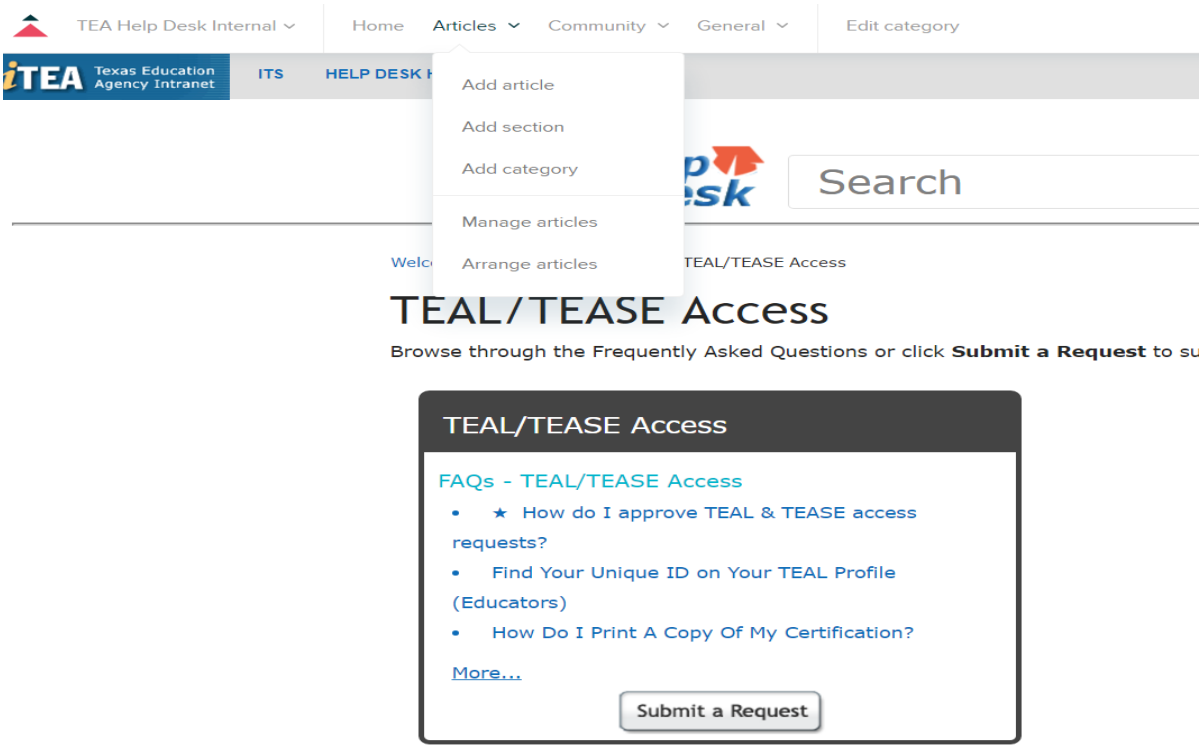

2. From the resulting dialog box, using the dropdown, select the Help desk that the FAQ applies to:




3. Click the section for your group, such as Account Access:



4. From the top menu click drop down under “Articles”, select **Add article.**




Do not add sections or categories to the Help Desk. These controls must correspond to the actual interface of the Help Desk and may only be added by TEA Help Desk development staff.

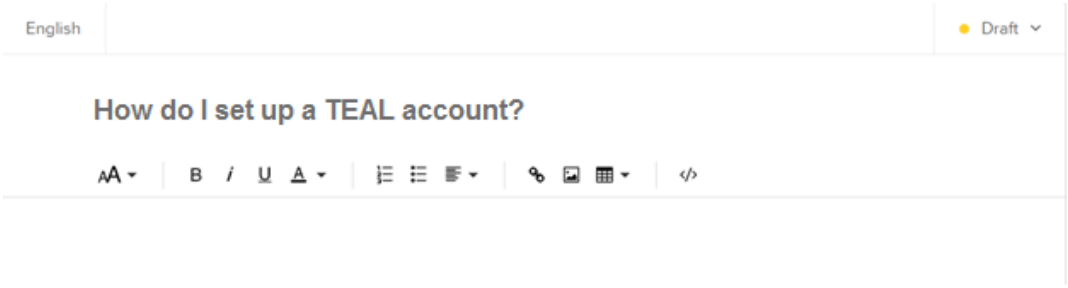
5. The Add article page appears. If you do not want to publish the article immediately but plan to work on it during successive sessions, click **Draft.**

**Note:** If you are maintaining a draft over several editing sessions, be sure to click **Draft** each time you open it to keep it in draft status.

6. Always uncheck **Open for Comments.** TEA Help Desk uses Zendesk functionality. In many Zendesk implementations, end users are prompted to leave comments at the end of FAQs. The TEA Help Desk implementation does not use this functionality, so comments must be disabled in each FAQ to eliminate the prompts and potential confusion for the end user.

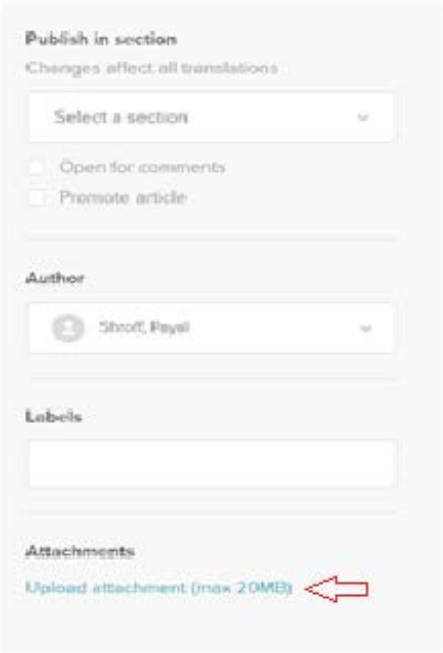
7. Type a title for the article. Since this article is a FAQ, word the title in the form of a question, if such wording is not awkward.

> **Note:** Be sure to consult the appendix for the guidelines and templates for FAQs.

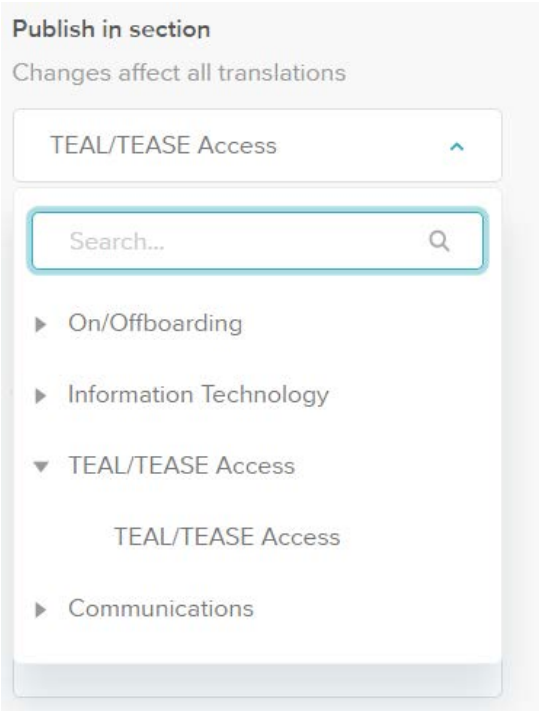



8. Insert your *approved* content into the Content field. This discussion assumes that you know how to use a standard text editor for Web content. If you want to see and change the source code, you can use the < > icon.

9. To add an attachment to the article, click on “Upload attachment” on the right pane. Use the browser to locate and attach the file.




10. Select the applicable section and subsection (if applicable) in which the FAQ should appear:



11. If you want the system to show the new article first in the list of FAQs, click **Promote article.** The article will also be highlighted.

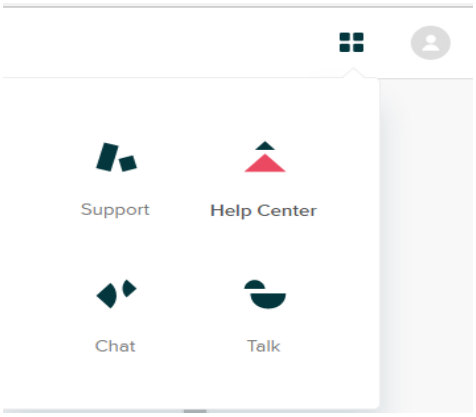
12. The search does a good job of finding any content included in the title or the text. However, if there are keywords that a searcher may use that are not in the article, for example synonyms, type them separated by commas in the **Labels** box.

13. If you are ready to add the article, click **Add.**

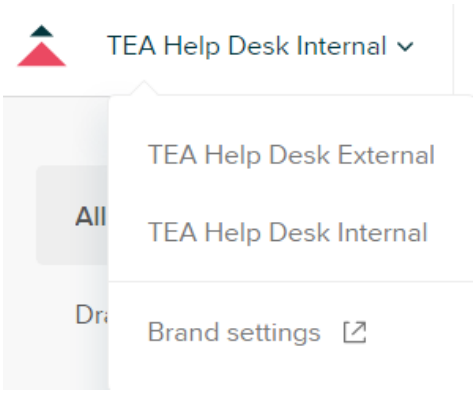
# Finding Your Drafts

If you have written a draft article, follow these steps to find and complete your draft:

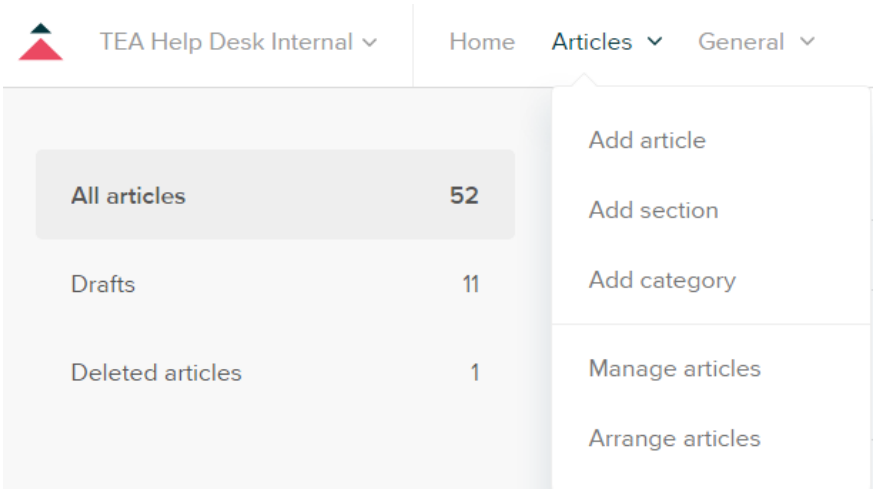
1. From the Dashboard, click the Help Center icon at the top right corner:



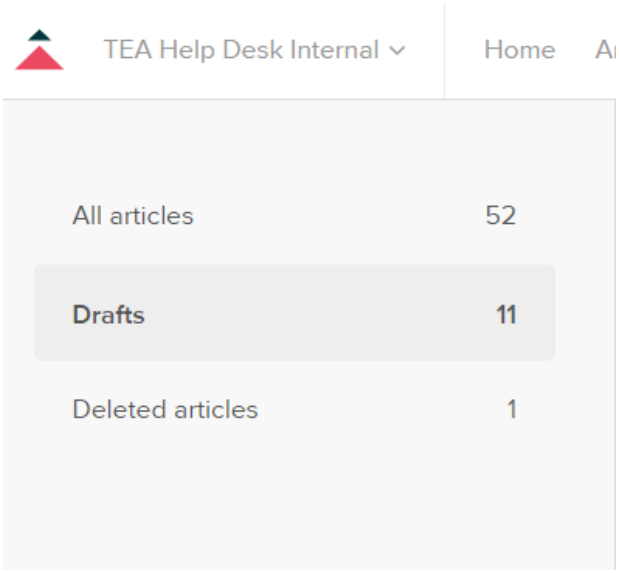

2. From the resulting dialog box, select the Help desk that the FAQ applies to:




3. From the content menu, click **Manage articles:**



The list of draft articles appears under the “Drafts” on the left pane.




4. Open the article by clicking on its title and continue working on it.

## Deleting a Draft

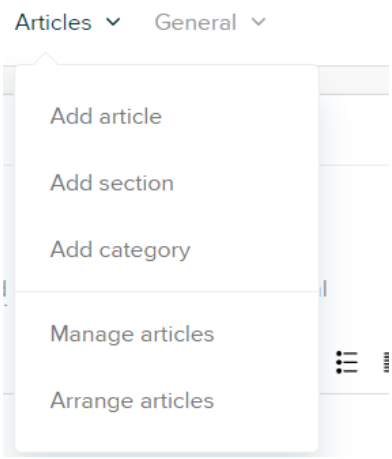
Opening a draft article shows a slightly different view, including an option to delete an article. To delete the draft article, click **Delete article.**

## Arranging Content

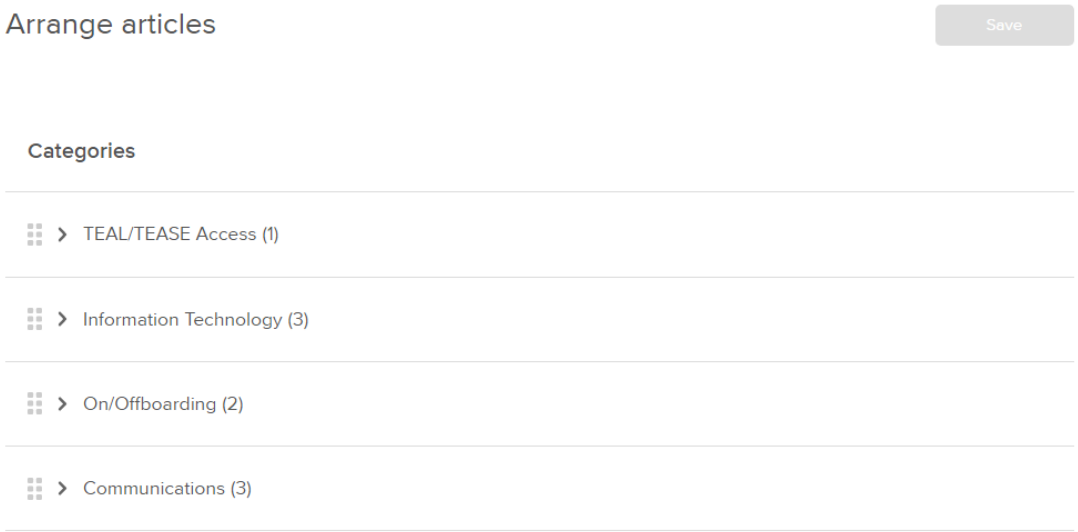
If you are a Group Admin, you can determine the order of the FAQs.

> Use caution when rearranging content. Moving the categories around in this area will also move the main groups and categories on the Landing and Group pages so can result in unintended consequences for the TEA Help Desk public view.

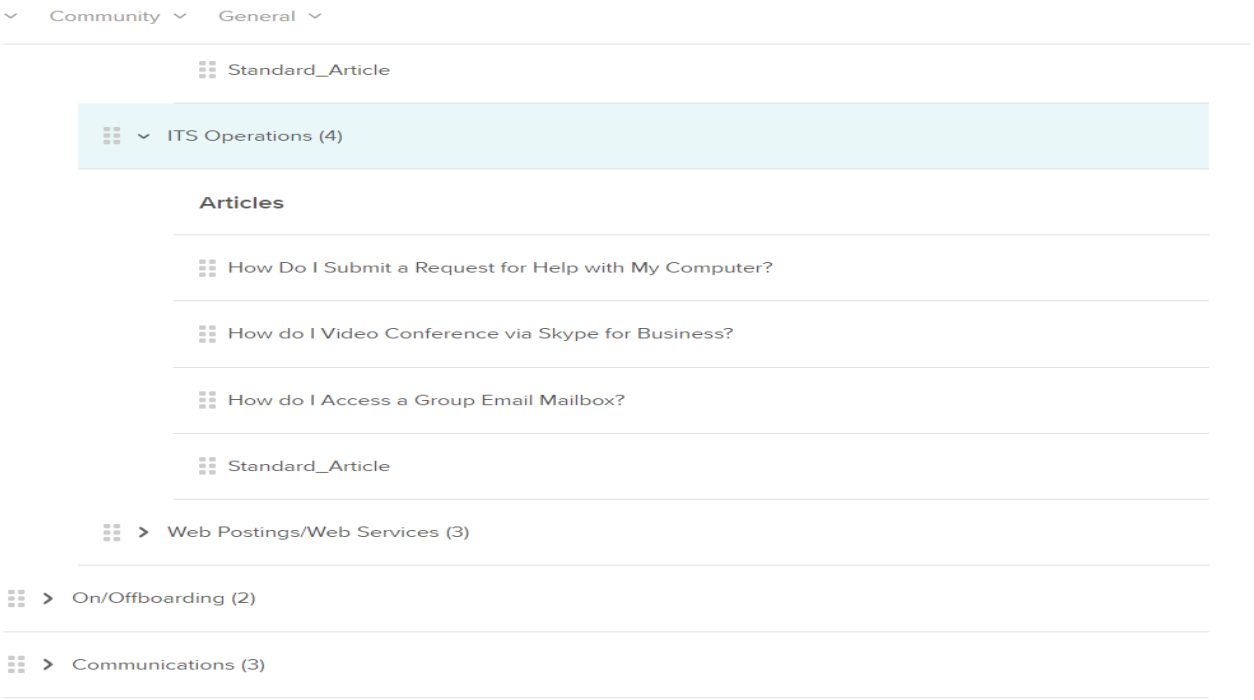
1. From the top menu click drop down under “Articles”, select **Arrange articles**



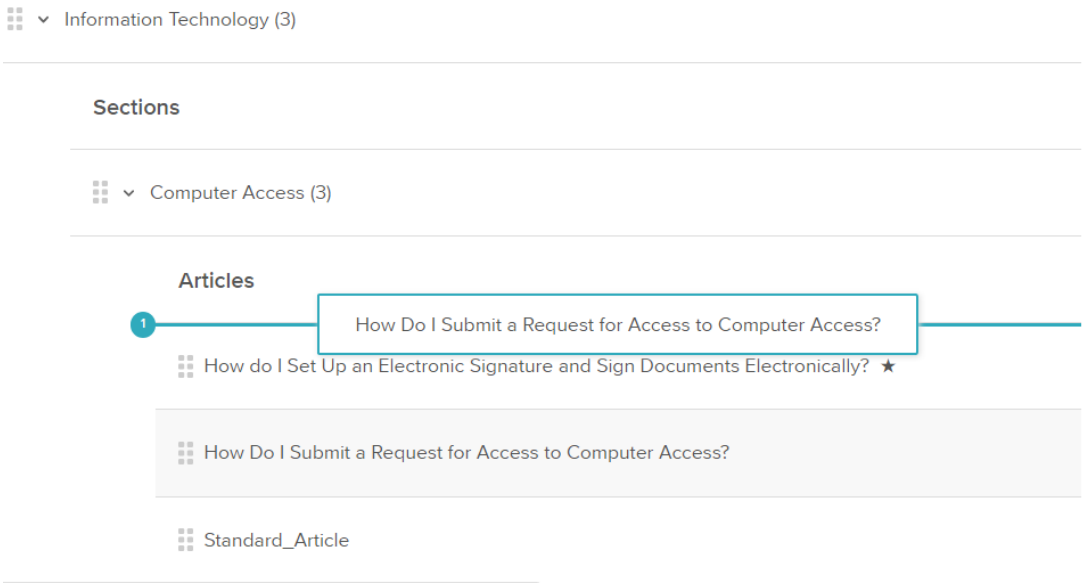

The Arrange content page shows the categories:



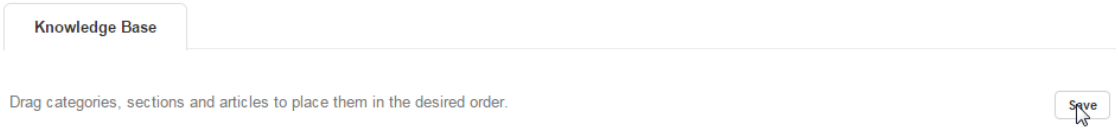
2. Click the arrows to open up the categories and see the sections and articles within your group's sections:




3. Drag and drop the articles within your group's section to rearrange them.



4. Click **Save** to save your changes:



# Appendix A. Process for Writing FAQs for the TEA Help Desk

FAQs and Knowledge Base Articles may be written and submitted by any internal TEA user. However, all should be reviewed by the appropriate Group Admin before being published.

> It's crucial to keep in mind that FAQs represent the agency to the public. They are viewed by internal users and often by the general public, potentially hundreds of times each. You must follow the policy set by your division for writing and reviewing publications for the internal or external customers who your group serves.

After the content of the FAQ is approved by the appropriate authority in your division (usually your division director or the business owner of the associated application), submit it to your Group Admin. The Group Admin can either create the FAQ in the TEA Help Desk, or if something more complicated is required, email the request to teaheldesk@tea.texas.gov. Help desk staff will assist with the process.

## Process for Organizing and Writing FAQs

When your group is preparing to implement the TEA Help Desk, follow the process below to organize and create initial content for your FAQs. You can add to them periodically as needed.

### Designate a Subject Matter Expert/Editor

To ensure your FAQs are complete, appropriate, and accessible, designate a person in the group as the subject matter expert and editor to verify that FAQ content and display are correct. That person will perform the following tasks:

- Collect input from users and the team for updates
- Think about and advocate for the needs of users
- Write articles and edit those written by others
- Cross-link articles when needed
- Routinely review articles that were previously posted for updates needed

### Process Steps for Drafting FAQs

Use the following process to get started organizing for FAQs:

1. List users' common questions. Consider each type of user or customer your group works with. Make note of the points at which users get stuck.
2. Look in existing help systems and documentation for answers. You may find something that can stand on its own as a FAQ, or you may need to edit or add to existing information.
3. Create a draft using the template near the end of this guide. You can create your draft outside of TEA Help Desk and circulate it for edits, or you can create it directly in TEA Help Desk and mark it as a draft until it's ready for the public.
4. Review your draft and revise it to fit the style guidelines included in this guide or used in your division.
5. Submit your draft.
6. After your article is approved, the Group Admin can add it to the TEA Help Desk repository for your group. (See the section "Creating and Managing FAQs" for instructions.)

## Style Guidelines

The template consists of:

- Title
- Very short introduction to focus user on who, what, when
- Body that answers question in plain language with sentence, short paragraph, or longer list of steps/graphics, written in 2nd person giving instructions to user
- Subtitle "Related Information" with links to other FAQs or to TEA website information
- Link to **Submit a Request** button to assist a user who still needs more information

FAQs must meet accessibility guidelines. Use the attached template for style and layout guidelines.

### Titles

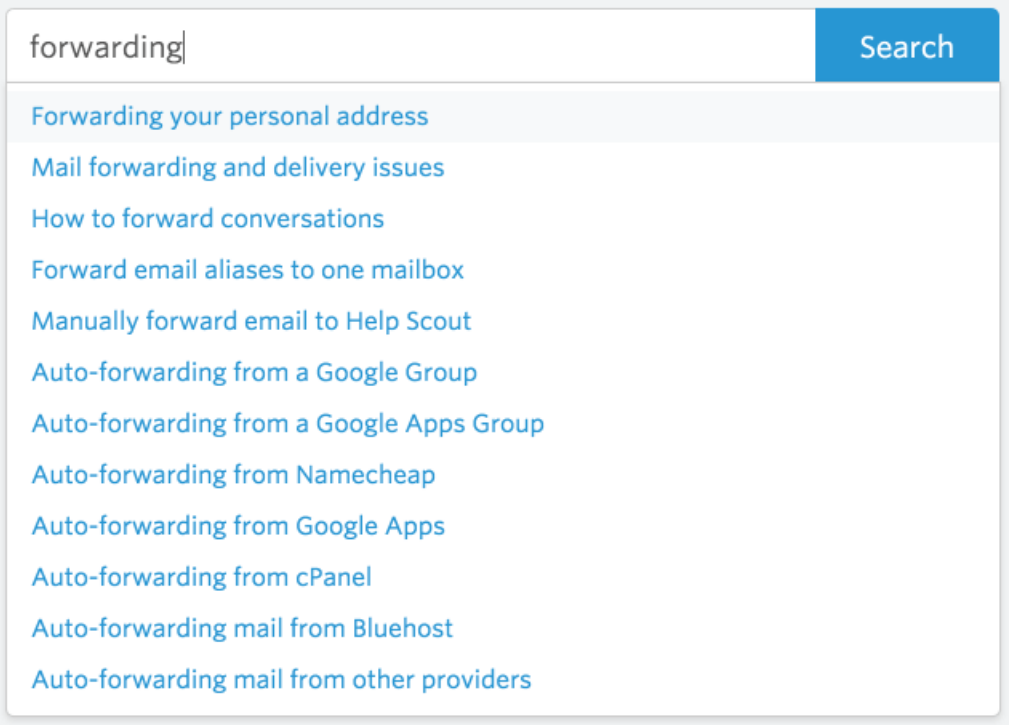
If possible and if worded naturally, phrase your title as a question.

Titles should be short, using keywords, phrased as users commonly ask it, with a verb that describes what they will do, such as "Set up", "Change", "Review and Approve", "Request". Rely on action words in the active voice for a majority of your titles:

- "How Can I Set Up . . ."
- "Using . . ."

- “Setting Up . . .”

Alternatively, use exact phrases of the actions they’ll take, such as “Uploading Your First Video,” “Installing Your Plugin.”




### Body

When introducing a longer article, create a quick table of contents at the beginning; it’s a small effort that genuinely enhances the experience. Even for articles of normal length, customers will appreciate being able to jump to the section they want.

## Usage Notes

The following usage notes provide the preferred spelling or use of common words and phrases:

- Email/email (not e-mail)
- Hardware:
  o Macintosh (not Mac)
  o Windows (not Win)
  o Linux
- Software:
  o Mac OS X
  o Windows

- Mobile Devices (not PDAs)
- Website (not web site)
- Home page (not homepage)
- Avoid Latin. Use “for example” not “e.g.” (exempli gratia - Latin) or “i.e.” (id est - Latin).
- You click a button or link; you don’t click on it.
- Use terms like “field,” “window,” “option” precisely; avoid generalizing these.
- Avoid using the words “button” and “link” if it’s self-evident in the interface. Only specify when you need to help the person find the object on a busy page or in an odd place.
- Use numbers for steps in a sequence. Each step gets its own number – if you add the result of the step (what the person sees) that is part of the step.
- Don’t use numbers for a list that is not sequential; use bullets.
- Avoid overuse of politeness words such as “please,” which clutter the text for the reader.
- Use “plain language.” See the presentation about this approach at http://pease/its/online/webservices/webadmin/default.aspx .

## When to Use Bold Formatting

Do use bold formatting to designate:

- **Buttons**
  Click the **Submit** button; Select the **Yes** radio button.
- **Drop-down menus and items**
  Select **Many** from the **Options** drop-down menu.
- **Paths**
  Go to **Firefox > Services > Finder**.
  Be sure to leave spaces between the words and the **>** so screen readers (and other users) can easily interpret the text.
- **Checkboxes**
  Select the **User** and **Administrator** checkboxes.
- **Notes, Tips, Warnings**
  **Note:** This software is no longer available.

- **Tabs**
  Clickable tabs should appear in bold:

  Click the **Control** tab to go to the next screen.
  (However, do not bold if it is simply referring to the name of the tab: The Control tab appears at the top of the page.)

*Don't* use bold formatting to designate window or dialog box names.

### When to Use Italics

Use italics formatting sparingly, but always for the following:

- Window, screen, or dialog box names:
  *Result:* The *Where do you want to install Windows?* dialog box appears.

*Don't* use italics formatting for:

- Button or link names

## When to Use Tables

Avoid using tables for content. Tables used for formatting are difficult for screen readers and other accessibility devices to interpret properly. Think about whether a list would be sufficient--or simply use carriage returns.

## Images, Links, and Attachments

Follow these guidelines for images, links, and attachments:

- Avoid using screen shots for obvious buttons in procedures, such as **Next, Continue, OK**.
- Avoid uploading documents or existing guides. When possible, link to a copy on the TEA website or work with the manager to have one placed there. This prevents the confusion that can arise when multiple copies of information are not kept up-to-date.
- Keep images as small as possible, but be sure to maintain readability and context. Generally 400 x 400 pixels is the maximum desired size so that images will fit on the page without scrolling and not be disruptive the flow of the document. You can crop images to show only the relevant portion of the screen or shrink the image to achieve your desired image size. For larger images, you can use a thumbnail in the article and users can click on it to see the full-size image.
- Use a light blue one-pixel border around images to delineate them from the body.
- Alt Tags: Alternative text provides a text description of images to users with disabilities. Screen readers and other accessibility devices can't interpret images without alt text.

- Every image must have a succinctly written alt attribute that describes the CONTENT and FUNCTION of the image.
- Alternative text should not use the phrases "image of..." or "graphic of....” The user already knows it is an image.
- If the image is simply a graphic of information you have already provided in text, you can use a null alt attribute that allows the screen reader to skip over the image. Alt=”” is a null alt attribute. (When working in Zendesk, the tool automatically puts a null alt attribute into the code when you add an image.) Alternative text must be edited in the code view, or graphics must be described in text above or below the image.

  When using screenshots, make sure that you are describing the action in text above or below the screenshot and that the screenshot is simply visible representation of content that is already in text.

# Tip, Note, Info, and Warning Boxes

Use sparingly; opt for the bold format for minor notes and tips. When products or services are undergoing major changes in functionality, support or availability, a support notice placed on pages related to that product or service is a good way to keep customers informed of the upcoming changes.

# FAQ Template

Use the following template for FAQs:

## Title

The title should be a very short introduction to focus users on who, what, and when. (When introducing a longer article, create a quick table of contents at the beginning.)

For a FAQ, state each question in the form of a list of questions at the top of the page. For the answers, restate the question, formatted as a subheading, and then answer it.

In the body of the article, answer question in plain language with sentence, short paragraph, or longer list of steps/graphics.

Zendesk does not permit much customization of FAQ formatting. Use the default fonts and font sizes. Follow established guidelines for titles, writing style, accessibility, and content organization. Use the designated “Related Topics” area at the end of the article to list links to related information.

## Related Information

[insert links to related FAQs or TEA website resources]

# Peer Review Checklist for FAQ

Check each item that is complete. Note where discussion or improvements are needed.

Title of FAQ _____

Reviewer _____

Author _____

Is it chunked to the amount of content that makes sense for our users?

Is it from user's point of view (directs user with clear instructions written to "you" or 2nd person)?

Will the title make sense to the end-user if it comes up in a search? Is it short, and does it contain a verb that describes the action that the user recognizes?

Is the template applied?

Is there an introductory line that describes who/what/when?

If the FAQ is long, does it have subtitles or a short TOC at the top?

Is it written in 2nd person, providing direct instructions to the user?

Are the grammar, punctuation, usage, and style correct?

Are the Related Topics appropriate? Are there others that should be listed?

Does it need to be labeled "Internal" (for support staff agent use only)?

Is it tagged to be easy to find?

What other group (SME or content owner) needs to review?

Has it been made ADA accessible for the web?

Other:

Notes: