ManageEngine

ServiceDesk Plus On-Demand

QUICK START GUIDE

ServiceDesk Plus On-Demand is an online help desk software built on the ITIL framework with integrated asset management. It is available in 15 different languages and in three editions namely Standard, Professional and Enterprise. ServiceDesk Plus On-Demand is easy to use and you can get your IT help desk up and running in minutes with a set of quick configurations. Follow the steps below to get started with the product quickly.

1. Basic configurations
2. Create accounts for users
3. Assign roles
4. Access the application
5. Incident management
    - Create business rules and service level agreements
    - Create incident templates

1.Basic Configurations

A. Organization Settings - Enter information about your organization

Go to **Setup -> Company Details** (Under organization settings section) -> Provide the basic information like name, address, and contact information of your organization.

Note: You can also configure your organization's time zone here.

Your Company Logo:

Upload the logo of your company under the "**Company Logo**" section. This logo will find place in all your reports, purchase orders, and application header.

The screenshot below will give you a fair idea of how your customized application 'header' will look.

B. Sites - Location details of your organization

If your organization is spread across multiple locations, then those locations can be configured as regions and sites and managed with a single console. Here's how you can configure a site.

Go to **Setup -> Sites** (Under the Organization Settings section) -> **New Site**. Provide the basic information like name, region, time zone, address, contact information, and related settings for your sites.

C. Mail Server Settings

The mail server configuration lets you to communicate with your users from within the application rather than using an external mail client. You can send and receive emails from the application by configuring the mail server.

To configure the mail server, Go to **Setup -> Mail Server Settings** (Under the Mail Settings section) **-> Configure the incoming and outgoing mail settings.**

You can filter out the spam mails (Ex: Out-of-Office) from getting into the application using the Spam Filter.

2. Create Accounts for Your Users

The users of ServiceDesk Plus On-Demand are classified as Requesters and Technicians. A requester is a person who raises an incident or a service request whereas a technician is a person who fixes the incident or provides the service to the requester.

2.1 Add Requesters

Requesters can be added into the application in three ways.

1. Import from Zoho Business
2. Import from CSV
3. Manual addition

Go to **Setup -> Users** (under the Users & Permissions section) -> Choose the desired option to add requesters.

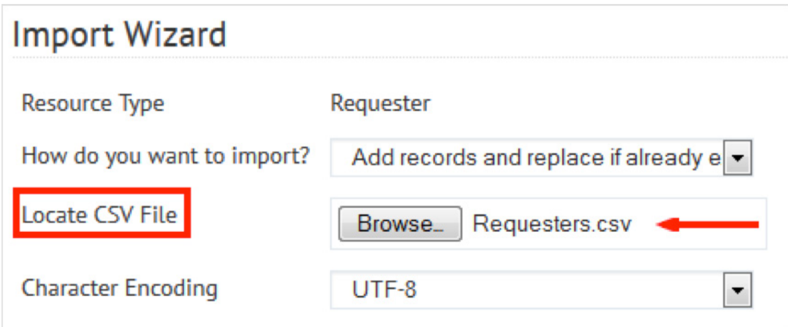
2.1.1 Import from Zoho Business

Requesters can be imported into ServiceDesk Plus On-Demand from your AD/LDAP through a provisioning app. User management in ServiceDesk Plus On-Demand is powered by Zoho. Therefore, a Zoho account will be automatically created for each of the imported user. To know more about the import process, click [here].

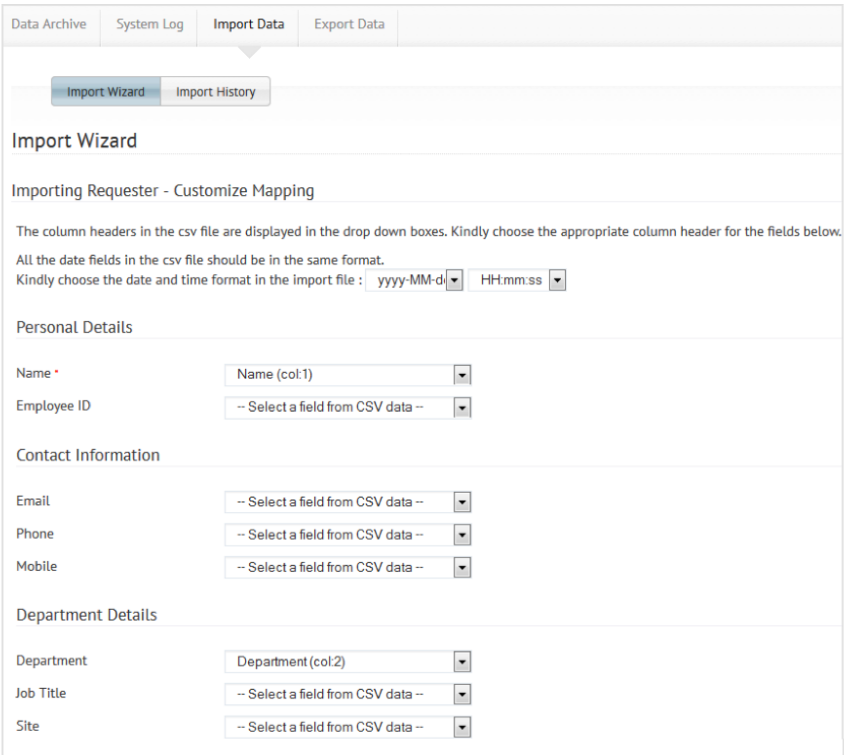
2.1.2 Import from CSV

You can import the requesters in bulk into ServiceDesk Plus On-Demand from a CSV file. Click on '**Import from CSV**', choose the CSV file and map the respective fields in the CSV file to the application fields and start importing.

Step 1: Browse and locate the file.



Step 2: Map the fields from the CSV to the application.



2.2 Add Technicians

By default, your users are imported into the application as Requesters. You can add your technicians in two ways,

- Change existing Requesters into Technicians
- Manual Addition

To change an existing Requester into a Technician, Go to **Setup -> Users** (Under the Users & Permissions section) **-> Requesters -> Choose a requester -> Click on the Change as Technician icon**

To manually add a Technician, Go to **Setup -> Users** (Under the Users & Permissions section) **-> Technicians -> New Technician**

Note: While adding the technician, you can associate one or more sites and groups to the technician for which he/she gets the access privilege. Also, you can configure the technician as a 'Service Request Approver' or 'Purchase Order Approver' apart from assigning roles.

3. Assign roles

Roles allow you to define the level of access privilege for your technicians over the application. Roles can be assigned for a technician when you add a new technician or when you convert a requester into a technician.

To assign roles, For a technician converted from a requester,
Go to **Setup -> Users** (Under Users & Permissions section) **-> Requesters -> Change As Technician -> Assign Roles** from the list of Available Roles

For a new technician,
Go to **Setup -> Users -> Technicians -> Enable Login for this Technician -> Choose the roles** from the list of Available Roles

To add a new custom role,

Go to **Setup-> Roles** (Under Users & Permissions section) -> **New Role**

You can either use default roles for your technicians or configure custom roles with fine-grained access privileges or a combination of both.

4. Accessing the Application

You can access ServiceDesk Plus On-Demand in two ways either by using a subdomain to sdpondemand.manageengine.com or by using a custom URL that is a part of your organization domain.

To configure a subdomain, follow the below steps:

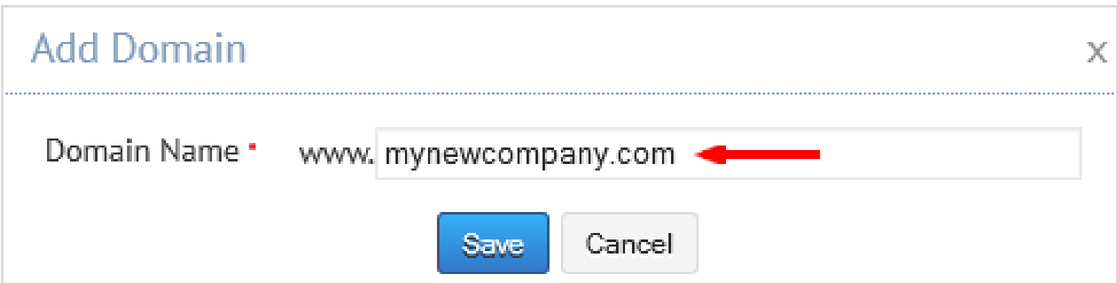
- Login to ManageEngine ServiceDesk Plus On-Demand using your organization admin's credentials
- Go to **Setup -> Self-Service Portal Settings**
- Configure the subdomain in the "**Domain Mapping**" section

Let's say you have configured the subdomain as 'mynewcompany', then you can access your ServiceDesk Plus On-Demand through <mynewcompany.sdpondemand.manageengine.com>.

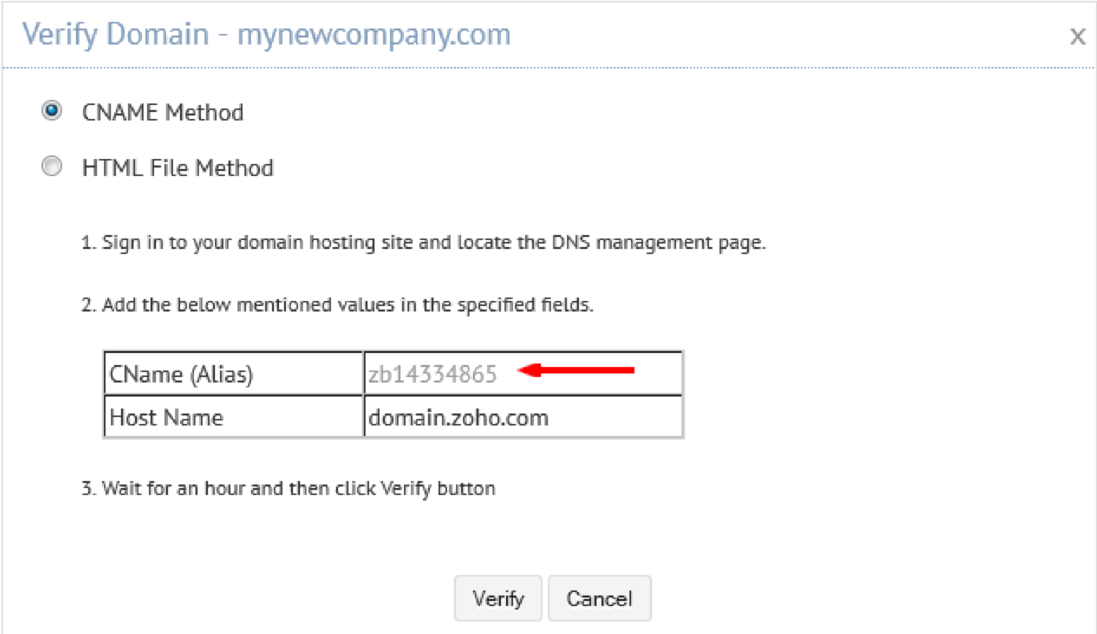
To configure a custom domain, let's assume that you need a custom URL of <support.mynew-company.com>. Follow the below steps to configure,

- Add and verify your domain

  - Login to ManageEngine ServiceDesk Plus On-Demand using your organization admin's credentials
  - Go to **Setup -> Organization Details -> Domains Details-> Add Domain -> Save**

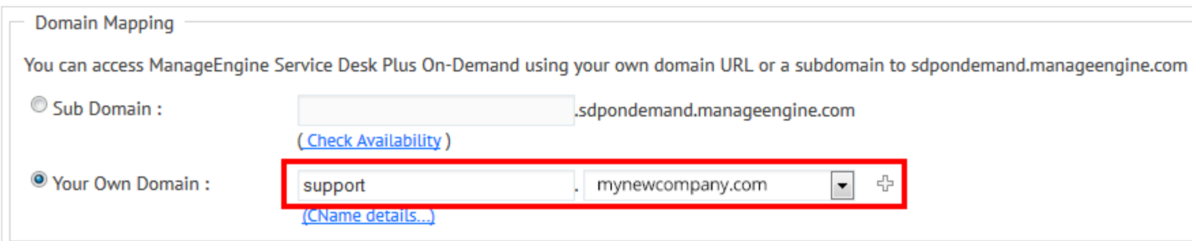


- '**Click to Verify**' your domain



Note: The highlighted unique CName Alias along with your domain should point towards domain.zoho.com. In this case, zb14334865.mynewcompany.com should point to domain.zoho.com for successful verification.

- Configure the custom domain
  - Go to Setup -> **Self Service Portal Settings** -> **Domain Mapping** -> **Your Own Domain**-> Choose the verified domain from the drop down and provide the domain detail



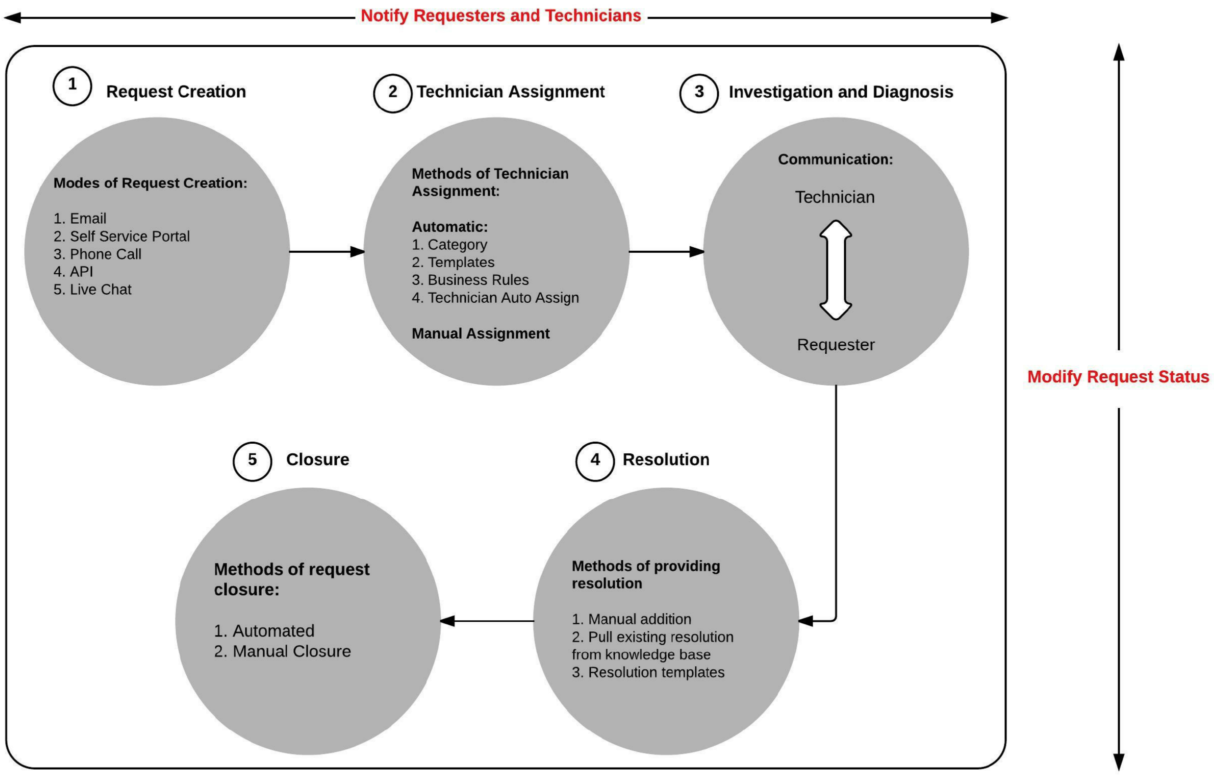
- Add a CNAME entry in your DNS
  - Add a CNAME entry for your custom domain which should point to "customer-sdpondemand.manageengine.com"
  - For the above example, support.mynewcompany.com must point to customer-sdpondemand.manageengine.com
  - Check if you are able to access ServiceDesk Plus On-Demand using the customized domain

- Also note that it may take around 2 hours for the CNAME entry to get propagated across all the DNS servers

5. Incident Management

Incident management in ServiceDesk Plus On-Demand will help you to manage the entire life cycle of the ticket, right from the creation of the ticket, technician assignment, communication with the requester, adding resolution, and ticket closure.

The following diagram illustrates incident life cycle in ServiceDesk Plus On-Demand:

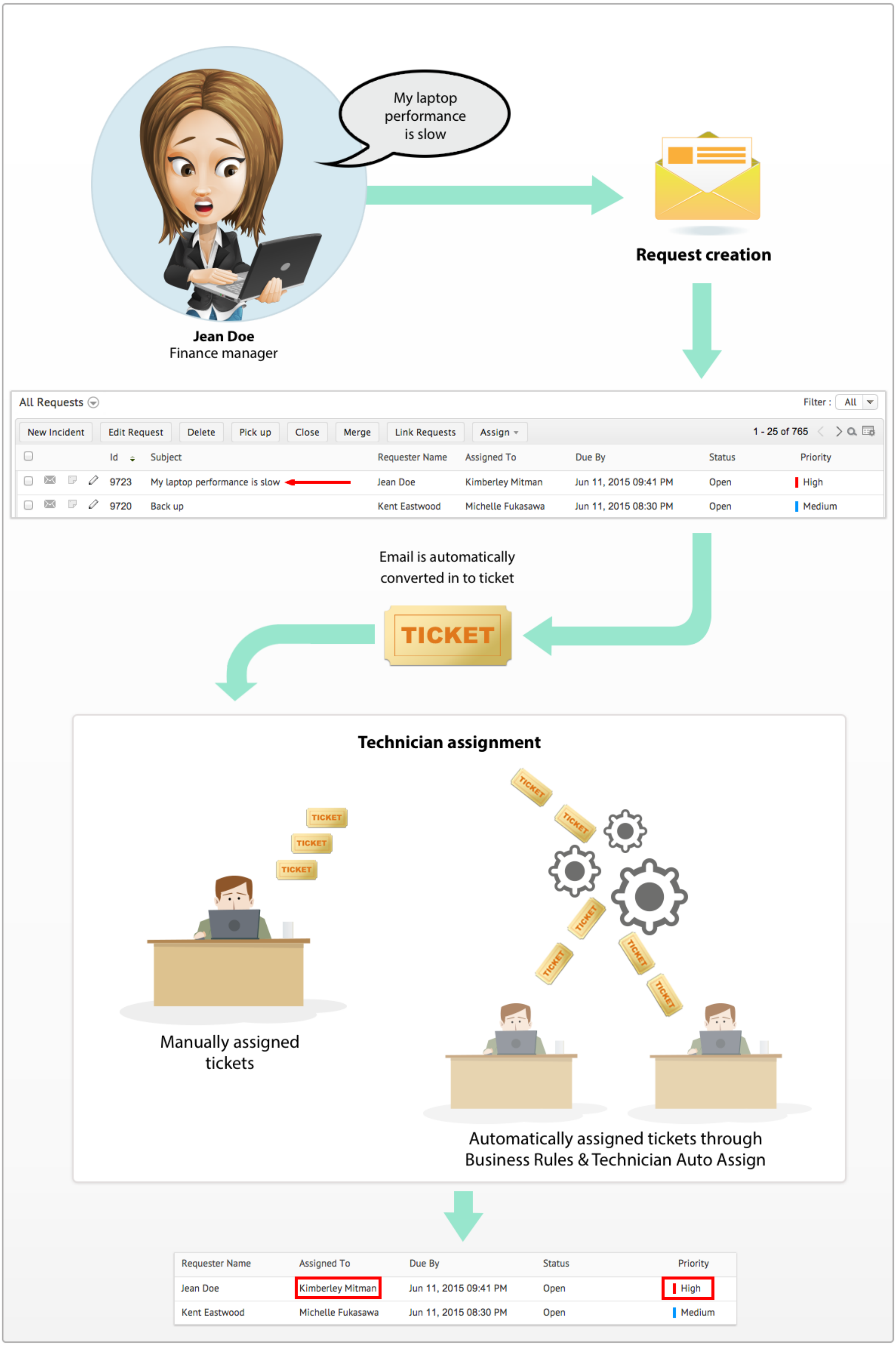


Incident Management with a Use Case

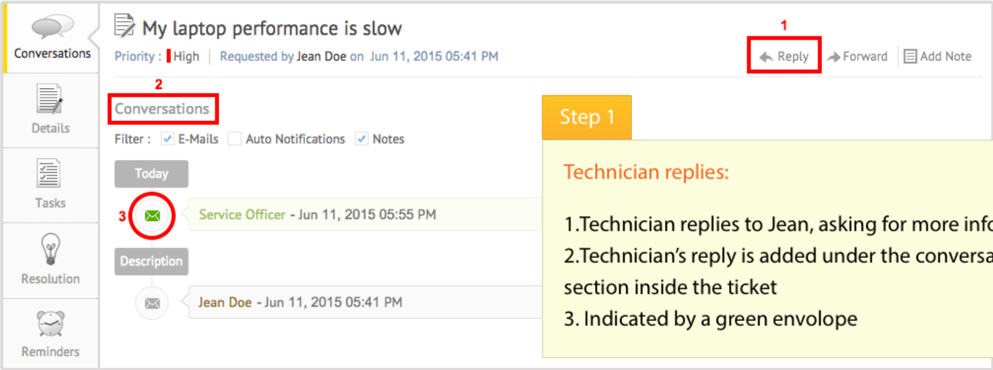
Let us take a simple use case to explain incident management.

Jean Doe is the manager of finance for a large manufacturing company. After the latest OS patch update her laptop has a low performance. She sends an email to her help desk seeking for a resolution. Here's how the administrator handles the incident using ServiceDesk Plus On-Demand.

Incident Management diagram with a Use Case



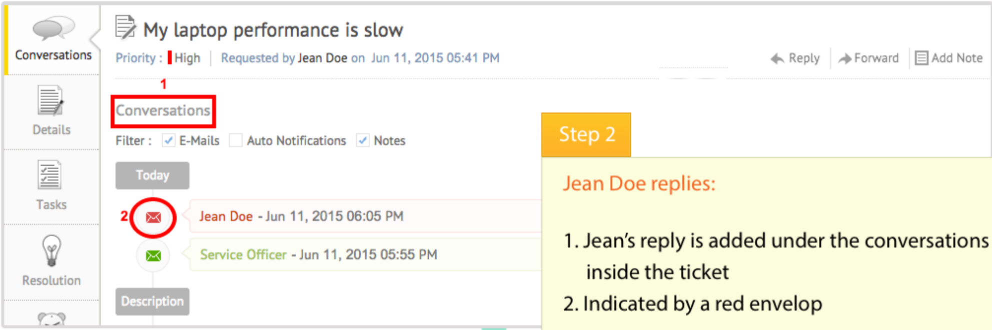
Investigation and Diagnosis



Step 1

Technician replies:

1.Technician replies to Jean, asking for more information.
2.Technician's reply is added under the conversation section inside the ticket
3. Indicated by a green envelope

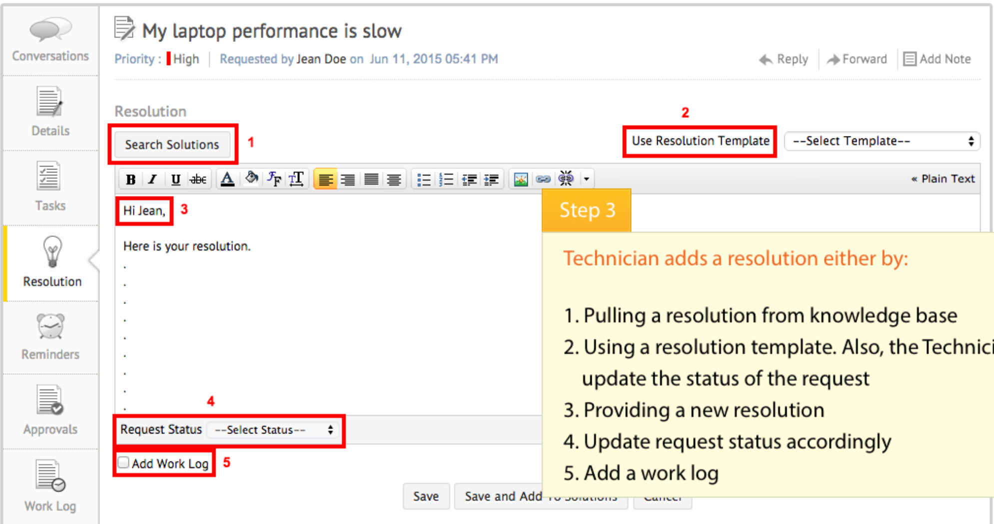


Step 2

Jean Doe replies:

1. Jean's reply is added under the conversations section inside the ticket
2. Indicated by a red envelop

Resolution

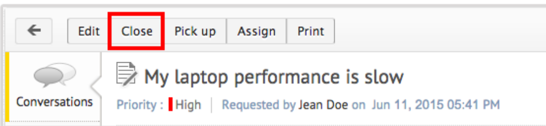


Step 3

Technician adds a resolution either by:

1. Pulling a resolution from knowledge base
2. Using a resolution template. Also, the Technician can update the status of the request
3. Providing a new resolution
4. Update request status accordingly
5. Add a work log

Closure

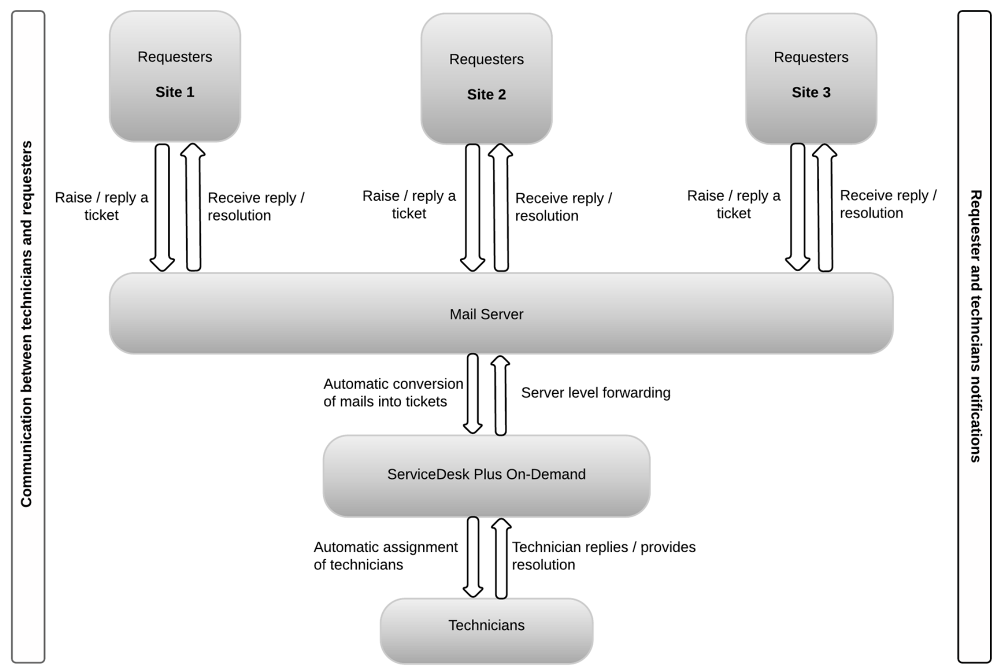


Step 4

Technician closes the request after providing the resolution

Email Processing and Response Workflow for Multi-site Support

If the company uses ServiceDesk Plus On-Demand to manage the IT environment across various sites, and your end users prefer to create tickets via email, then here's how your email creation and response workflow would work.



Email processing and response workflow for multi-site support

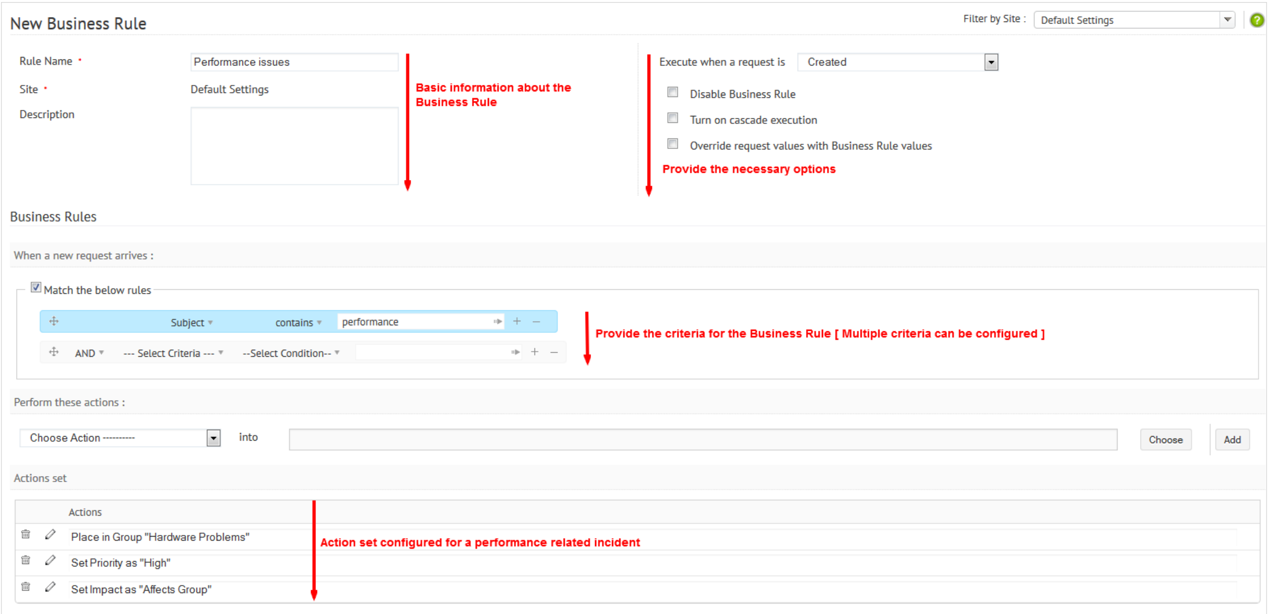
5.1 Configure Business Rules and Service Level Agreements

5.1.1 Automate ticket workflow through Business Rules

Business Rules help you to organize the incoming tickets and automate the ticket workflows. Based on certain criteria, you can perform actions like assigning a technician, placing the ticket in a group, set priority and so on.

To configure Business Rules,

Go to **Setup** -> **Business Rules** (under the Automation section) **-> New Business Rule**.



Auto Assign Tickets

Apart from the Business Rules, you can also use Technician Auto Assign to assign a technician automatically to a ticket. Technician Auto Assign follows two methods,

- Round Robin
- Load Balancing

Tickets are assigned to the technician in a serial manner when you have chosen the Round Robin method whereas the application assigns technicians based on the number of open or pending tickets when you choose Load Balancing.

To enable Technician Auto Assign,

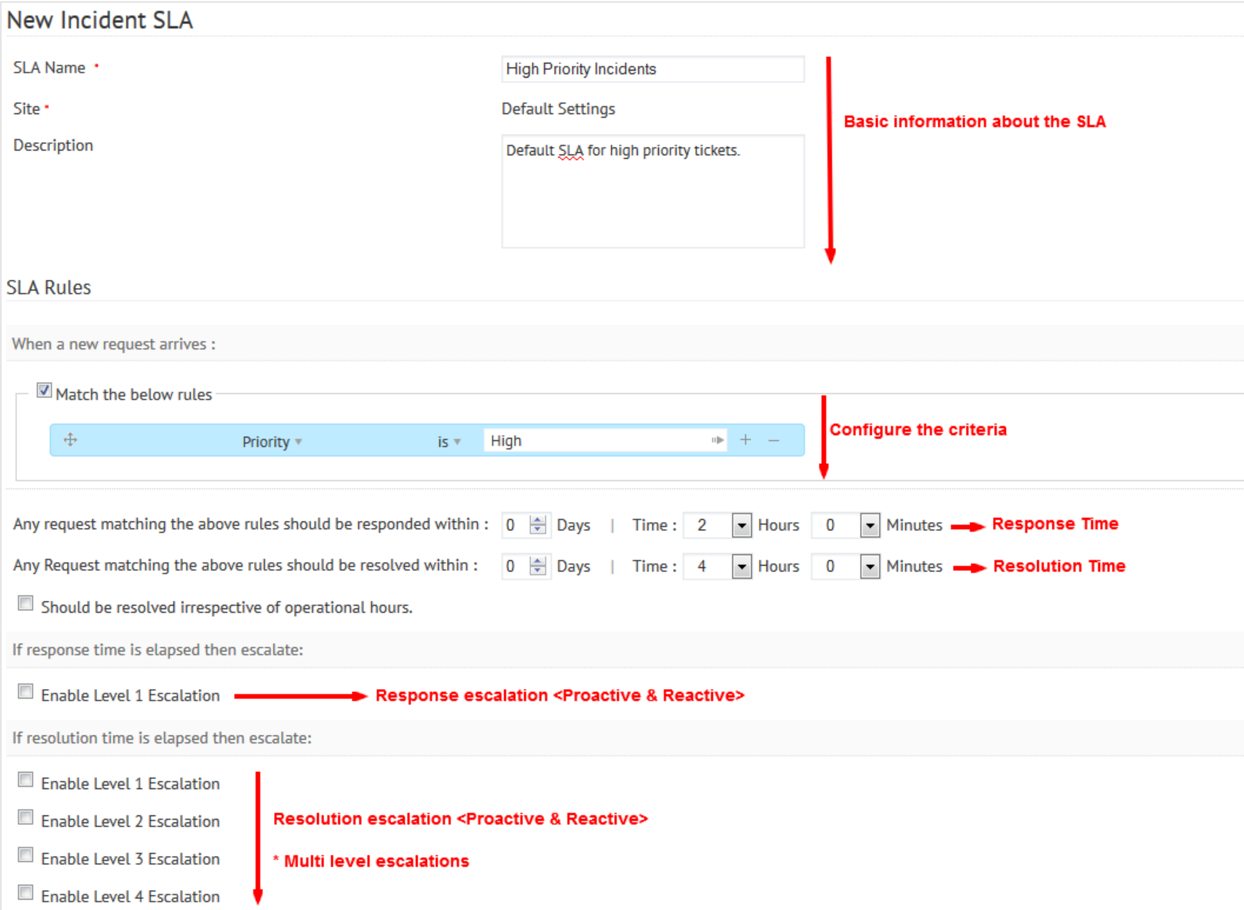
Go to **Setup -> Technician Auto Assign** (Under the Automation section) **-> Provide the configurations based on your requirement.**

5.1.2 Service Level Agreements

Service Level Agreements define the timeframe within which a ticket has to be responded and resolved.

To configure an SLA,

Go to **Setup -> Service Level Agreements** (under the Automation section) **-> New SLA (For incidents and Service Requests)**



5.2. Configure Incident Templates

As an administrator, you can create a set of templates for the frequently created incidents and share with your users. These incident templates help your users to raise the incidents quickly with all the necessary fields getting populated automatically.

To configure the incident templates,

Go to **Setup -> Incident templates** (under the Templates & Forms section) **-> New Incident Template.**

Configure the fields such as priority, impact, mode, etc so that when the users create an incident using this template, they need not spend time in configuring these fields every time. Now that you are done with the basic configurations, you can create tickets and start using ServiceDesk Plus On-Demand to manage them.

www.ondemand.servicedeskplus.com

sdp-ondemand-support@manageengine.com

+1-925-924-9500