

ManageEngine   
ServiceDesk Plus

# QUICK START GUIDE

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# Quick Start Guide for ServiceDesk Plus

ServiceDesk Plus is a full-stack ITSM suite with integrated asset and project management capabilities built based on industry-standard best practices . It is available in 29 different languages and is trusted and used by 95000 companies, across 186 countries, to manage their day-to-day IT help desk operations. ServiceDesk Plus is easy to use and you can get your IT help desk up and running in minutes after installation. Following steps will help you get started with the product.

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

## 1. Basic Configurations

### a. Organization Details - Enter information about your organization:

Go to Admin -> Organization Details (Under help desk section) -> Provide the basic information like name, address and contact information of your organization.



### Organization details

### Your Company Logo:

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

## Customized Login Page:

To have a customized login page image and application header image,

**Go to Admin -> Self Service Portal Settings (Under General Section) -> Customize ServiceDesk -> provide the login page image and the header image.**

Let's say your organization's name is Mannion Services. The screenshot below will give you a fair idea of how your customized 'login page' will look.



Here's 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 installation. Here's how you can configure a site.



Go to Admin -> Sites (Under the helpdesk section) -> Add 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 to your users from within the application rather than using an external mail client. You can send and receive emails to and from the application by configuring the mail server.



## Mail Server Settings

To configure the mail server,

Go to Admin -> Mail Server Settings (Under the Helpdesk section) -> Configure the incoming and outgoing mail server.

Incoming	Outgoing	Spam Filter	E-mail Command
<p> During mail fetching, ManageEngine ServiceDesk Plus will delete e-mail messages for the mail account in the mail server. Hence create a separate mail account and alias it to this mail ID.</p>			
<p>* <b>Server Name / IP Address</b> <input type="text" value="Your_Server_Name"/> * Mandatory Field</p>			
<p>* <b>User Name</b> <input type="text" value="Your_User_Name"/></p>			
<p>* <b>Password</b> <input type="text" value="Reset Password"/></p>			
<p>* <b>E-mail Address</b> <input type="text" value="Support@mannionservices.com"/></p>			
<p><b>E-mail Type</b> <input type="text" value="POPS"/></p>			
<p>* <b>Port</b> <input type="text" value="995"/></p>			
<p>* <b>Fetch mails every</b> <input type="text" value="1"/> <b>Minutes</b></p>			

You can filter out the spam mails (e.g: Out-of-Office) from getting into the application using the Spam Filter. E-mail Command lets you to create tickets through email when you do not have access to the application based on pre-configured delimiters. The mentioned request parameters will be set for a ticket upon creation of a ticket through Email Command.

Note: Please make use of the Help Card section under the mail server settings for brief explanations.

## 2. Create Accounts for Your Users

The users of ServiceDesk Plus 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.

## a. Add Requesters

Requesters can be added into the application in three ways.

1. Import from Active Directory
2. CSV import and
3. Manual addition

Go to Admin -> Requesters (under the users section) -> Choose the desired option to import requesters.

[ **Import from Active Directory** | **Import from CSV** | **Add New Requester** ]

### i. Import from Active Directory:

To add requesters into ServiceDesk Plus from your Active Directory Server, you can choose this option. Importing from AD will let your requesters to login to ServiceDesk Plus using their AD credentials. Clicking on 'Import from Active Directory', the following page will pop up.

**Import from Active Directory**

**Please Note:**  
1. On importing, existing data will be overwritten and new data will be added.  
2. Application is currently configured NOT to e-mail requesters on Self-service login details. This can be enabled from 'Notification Rules' in Admin.

**\* Domain Name**  \* Mandatory Field

**\* Domain Controller**

**\* Login Name**

**\* Password**

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**Select fields for import**

<input checked="" type="checkbox"/> Phone	<input type="text" value="telephoneNumb"/>	<input checked="" type="checkbox"/> Mobile	<input type="text" value="mobile"/>
<input checked="" type="checkbox"/> Department	<input type="text" value="department"/>	<input checked="" type="checkbox"/> Site Name	<input type="text" value="physicalDelivery"/> ?
<input checked="" type="checkbox"/> Job title	<input type="text" value="title"/>	<input checked="" type="checkbox"/> E-mail	<input type="text" value="mail"/>
<input checked="" type="checkbox"/> Reporting To	<input type="text" value="manager"/> ?		

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**Select UDF for import** ?

<input type="checkbox"/> Physical Location	<input type="text"/>	<input type="checkbox"/> Business Impact	<input type="text"/>
--------------------------------------------	----------------------	------------------------------------------	----------------------

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Move associated assets ?

Provide the Domain Name and your Domain Controller credentials. Choose the user details to be imported from the Active Directory under 'Select fields for import'. You can also import user additional fields (if configured) under 'Select UDF for import' option. Click on 'Import Now', this will ask you to choose the Organizational Units to be imported. Choose the respective Organizational Unit and start importing.

**Note:** When you do an Active Directory import, your users are entitled to login to the application using pass-through authentication.

## ii. Import from CSV:

You can import the requesters in bulk into ServiceDesk Plus 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.

### CI Import Wizard

CI Type

Locate CSV File  Requesters.csv

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#### Customize Mapping

The column headers in the csv file are displayed in the drop down boxes. Kindly choose the appropriate column header for the fields below.

All the date fields in the csv file should be in the same format. Kindly choose the data format required for the date fields :

#### Personal Details

First Name\*

Last Name

Employee ID

#### Contact Information

E-Mail

Phone

Mobile

#### Department Details

Department Name

Job title

Reporting To

ReportingTo's Email

Site Name

Move associated assets

#### Self-Service Access Details

Provide self-service login details here

Login Name\*  [Used to identify user uniquely]

Password\*

Domain Name

#### CI Details

Physical Location

Business Impact

## b. Add Technicians

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

1. Change existing Requesters into Technicians
2. Manual Addition

To change an existing Requester into a Technician,

Go to Admin -> Requesters (Under the users section) -> Choose a requester -> Change as Technician.



To manually add a Technician,

Goto Admin -> Technicians (Under the users section) -> Add 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 privileges. 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.



To configure Roles, Goto Admin -> Roles (Under Users Section) -> Add New Role.



**Add Role** [ View List ]

\* Mandatory Field

\* Role Name

Description

\*Access permissions

Access levels >>	Full Control	View	Add	Edit	Delete
Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Advanced Permission

Requests			
<input type="checkbox"/> Add	<input type="checkbox"/> Adding/Editing Request Task	<input type="checkbox"/> Adding Requester	
<input type="checkbox"/> Edit	<input type="checkbox"/> Resolving Request	<input type="checkbox"/> Allow Stop Timer	<input type="checkbox"/> Merging Requests
	<input type="checkbox"/> Closing Request	<input type="checkbox"/> Modifying Due Time	<input type="checkbox"/> Modify Resolution
	<input type="checkbox"/> Reopening Request	<input type="checkbox"/> Assigning Technician	<input type="checkbox"/> Editing Requester
	<input type="checkbox"/> Editing closed Requests		
<input type="checkbox"/> Delete	<input type="checkbox"/> Editing/Deleting Others Notes	<input type="checkbox"/> Deleting others Time Entry	<input type="checkbox"/> Deleting Request Task
	<input type="checkbox"/> Editing/Deleting own notes		

Purchase		
<input type="checkbox"/> Add	<input type="checkbox"/> Adding New Product	<input type="checkbox"/> Adding New Vendor

Scan	
<input type="checkbox"/>	Scan Now

Reports	
<input type="checkbox"/>	Create Query Report

Technician allowed to view

All

All in associated sites

All in group & assigned to him[Requests and Changes only]

Assigned to him[Requests and Changes only]

Technician allowed to Approve Solution

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

#### 4. Accessing the application

Internally, you can access the application with the URL <http://<ServerName>:<PortNumber>> or <http://<ServerIPAddress>:<PortNumber>>. But if you want to expose the URL to the external world (so that your users across the globe can access), then you need to login to ServiceDesk Plus as an administrator and perform the following.

Go to Admin -> Self-Service Portal Settings (Under General Section)

Configure an alias URL which will be exposed to the external world.

[http:// support.mannionservices.com](http://support.mannionservices.com) Example : support.acme.com:8080

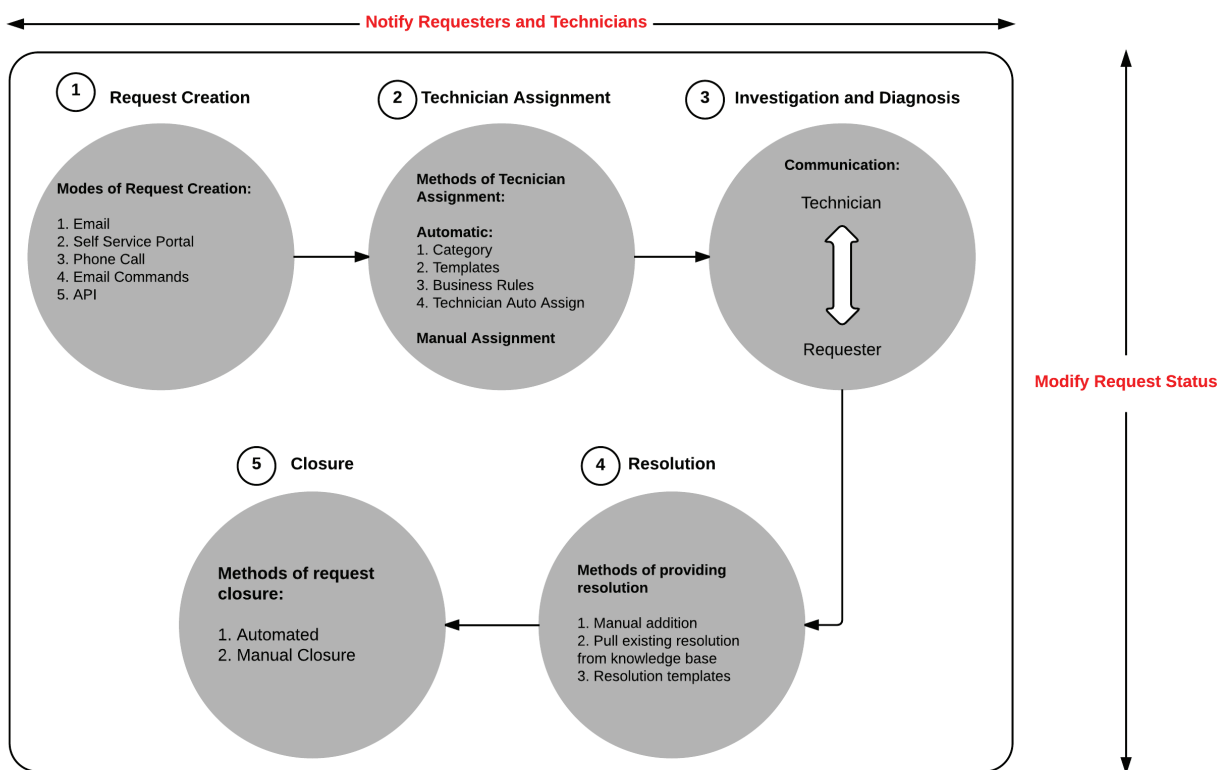
To check, [Open alias URL in a new window](#)

**Note:** The URL you provided here has to be resolved in your DNS server to the IP address of the server machine with the help of your Network Administrator.

## 5. Incident Management.

The incident management in ServiceDesk Plus 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 diagram illustrates incident workflow life-cycle in ServiceDesk Plus:

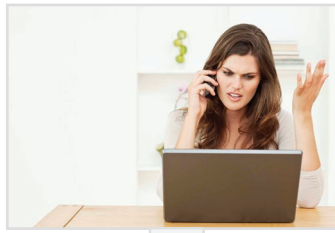


### Incident Management with a use case:

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

Jean Doe, the manager of Finance for Mannion Services, faces a slowness in her laptop performance after the latest OS patch update. She sends an email to her help desk seeking for a resolution. See how the administrator handles the incident using ServiceDesk Plus below.

Jean Doe,  
The Manager of Finance



Laptop performance  
is slow



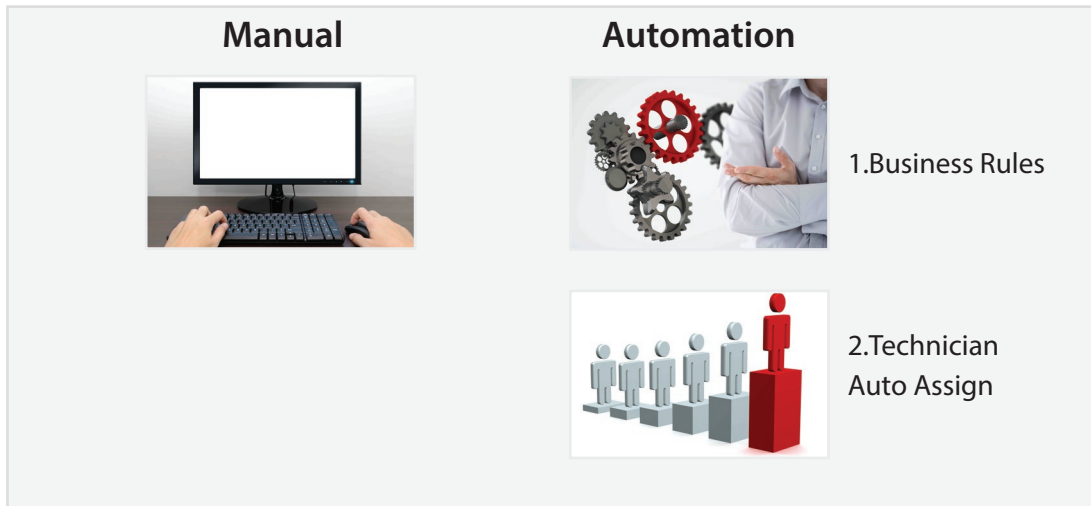
## Request Creation

All Requests		Request ID	Go	Settings	Open Tasks : 4	Import Requests
New Incident		Actions	-- Select Technician -	Assign	1 - 21 of 21	Show 25 per page
ID	Subject	Requester Name	Assigned To	Priority	DueBy	Status
53	Laptop Performance is slow	Jean Doe	administrator	High	Jan 28, 2015 08:30 PM	Open
51	Send Download report	Heather Graham	Shawn Adams	-	-	Open

Email is automatically converted into a ticket



## Technician Assignment



Requester Name	Assigned To	Priority	Technician and Priority are automatically assigned through Business Rules
Jean Doe	administrator	High	

## Investigation and Diagnosis

**Requester Conversations** | [View All Conversations]

administrator on Jan 28, 2015 06:54 PM

53 **Laptop Performance is slow**

Update request status to: **On Hold** after reply sent.

Technician replies to Jean, asking for more information.

1. Technician's reply is added under the conversation section inside the ticket
2. Indicated by a green envelope
3. Updates the request status to On Hold

Jean Doe replies.

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

53 **Laptop Performance is slow**

**Requester Conversations** | [View All Conversations]

administrator on Jan 28, 2015 06:54 PM

Jean Doe on Jan 28, 2015 07:08 PM

## Resolution

Request ID : 53

**Laptop Performance is slow**

By Jean Doe on Jan 28, 2015 06:37 PM Due Date : Jan 28, 2015 08:30 PM

Request Tasks (0/0) Resolution History

Search Solutions or Add a resolution below

Update request status to: Open

Add Work Log

Technician adds a resolution either by:

1. Pulling a resolution from knowledge base
2. Providing a new resolution
3. Using a resolution template

Also, the Technician can

4. Update the status of the request
5. Add a work log

## Closure

Technician Closes the request after providing the resolution

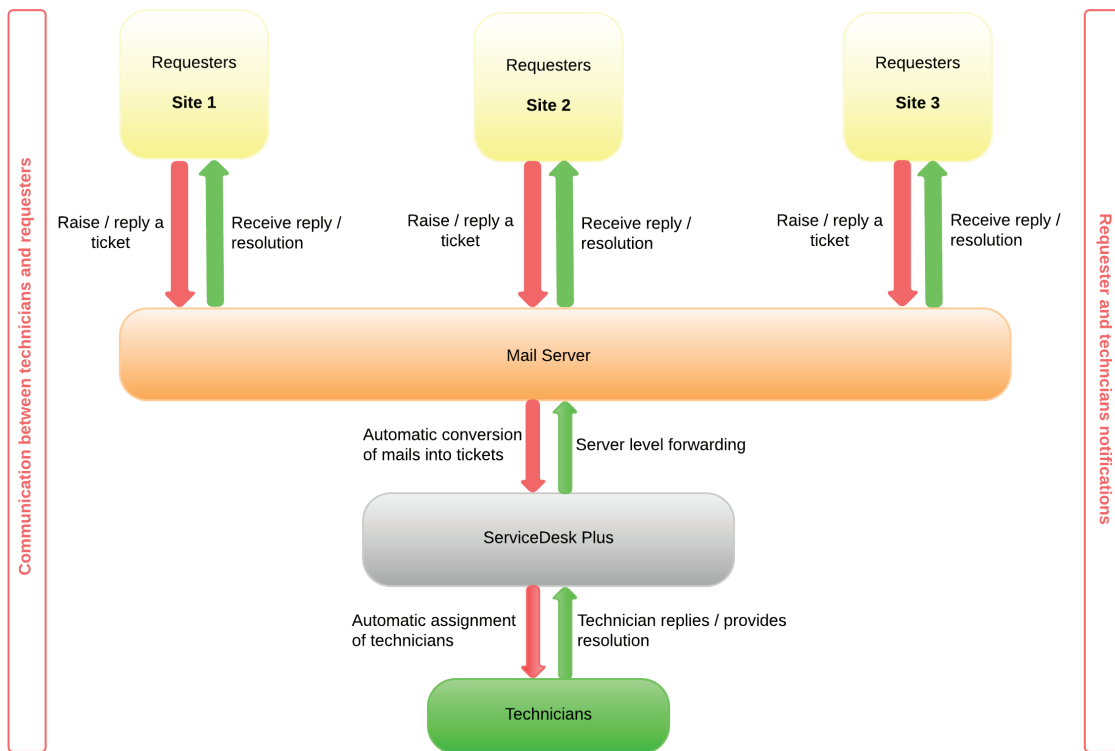
Request ID : 53

**Laptop Performance is slow**

By Jean Doe on Jan 28, 2015 06:37 PM Due Date : Jan 28, 2015 08:30 PM

## Email processing and response workflow for multi-site support:

If Mannion Services uses ServiceDesk Plus 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

### a. Configure Business Rules and Service Level Agreements

#### i. 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 Admin -> Business Rules (under the help desk section) -> Add New Business Rule.

The screenshot shows the 'Configuration Wizard' interface for editing a business rule named 'VIP user'. The interface is divided into several sections:

- Basic Information:** Fields for 'Rule Name\*' (VIP user), 'Site\*' (Default Settings), and 'Description'. A red arrow points to this section with the text 'Basic information about the Business Rule'.
- Execution Options:** 'Execute when a request is' (Created) and 'Any Time'. Three checkboxes are present: 'Disable Business Rule', 'Turn on cascade execution', and 'Override request values with Business Rule values'. A red arrow points to these options with the text 'Provide the necessary options'.
- Criteria and Actions:**
  - When a new request arrives:** A section to 'Define rule' with 'Select Criteria' and 'Conditions' dropdowns. A red arrow points to this section with the text 'Provide the criteria'.
  - Match the below criteria:** A table with one rule: 'VIP User is' with a 'Yes' value. A red arrow points to this row with the text 'Criteria configured for a VIP user'. The table also includes a note: '\* Multiple criteria can be configured' and radio buttons for 'Match ALL of the following (AND)' and 'Match ANY of the following (OR)'.
  - Perform these actions:** A section to 'Choose Action' with an 'Into' field. A red arrow points to this section with the text 'Choose the action to be performed upon matching the criteria'.
  - Actions set:** A table listing actions: 'Set Priority as "High"', 'Set Impact as "High"', and 'Assign to Technician "administrator"'. A red arrow points to this table with the text 'Action set configured when there is a request from a VIP user: Priority is set as "High" Assigned to technician "administrator"'. There are also 'Choose' and 'Add' buttons.

## 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,

- I. Round Robin
- II. 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 Admin -> Tech Auto Assign (Under the users section) -> Provide the configurations based on your requirement.

## ii. Service Level Agreements

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



### Service Level Agreements

To configure an SLA,

Goto Admin -> Service Level Agreements (under the help desk section) -> Add New SLA.

**Configuration Wizard** << Previous Next >>

Helpdesk - Service Level Agreements for **Default Settings**

**Edit SLA - High SLA** [ View List ]

\*Mandatory Field

**SLA details**

SLA Name \* High SLA  
Site \* Default Settings  
Description Default SLA for priority High

**SLA Rules**

When a new request arrives :

Match ALL of the following (AND)  Match ANY of the following (OR)

Criteria  
--- Select Criteria --- is [ Choose ] [ Add to Rules ]

**Rules Set**

Rule
Priority is "High"

Any request matching the above rules should be responded within : 0 Days 1 Hours 0 Minutes → **Response Time**

Any request matching the above rules should be resolved within : 0 Days 6 Hours 0 Minutes → **Resolution Time**

Should be resolved/responded irrespective of operational hours.  
 Should be resolved/responded irrespective of Holidays.  
 Should be resolved/responded irrespective of Weekends.

If response time is elapsed then escalate: ← **Response escalation <Proactive & Reactive>**

**Enable Level 1 Escalation**

If resolution time is elapsed then escalate: ← **Resolution escalation <Proactive & Reactive>**

**Enable Level 1 Escalation**  
 **Enable Level 2 Escalation**  
 **Enable Level 3 Escalation**  
 **Enable Level 4 Escalation**

**Multi-level escalations**

## b. 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,

Goto Admin -> Incident templates (under the helpdesk section) -> Add New Template.

Configure the Technician view, Requester view, Tasks for this template. Fields such as priority, impact, technician, mode etc can also be configured so that the users need not spend time in configuring them while creating a ticket through this template.

Now that you are done with the basic configurations, you can create tickets and start using ServiceDesk Plus to manage them.

For a detailed explanation about the product and its features, refer [Admin Guide](#).

For installation assistance, refer [Installation guide](#).

# ManageEngine ServiceDesk Plus

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