Quick Start Guide

VanillaDesk Version: 1.0.

The VanillaDesk Web site provides the latest product updates. If you have any comments about this documentation, please submit your feedback to support@vanilladesk.com.

Contents

1. WELCOME TO VANILLADESK!

Thank you for choosing VanillaDesk! As a user, your actions and feedback contribute to the application quality as well as plans for future developement. We hope that you enjoy working with VanillaDesk as much as we do!

Yours sincerely,

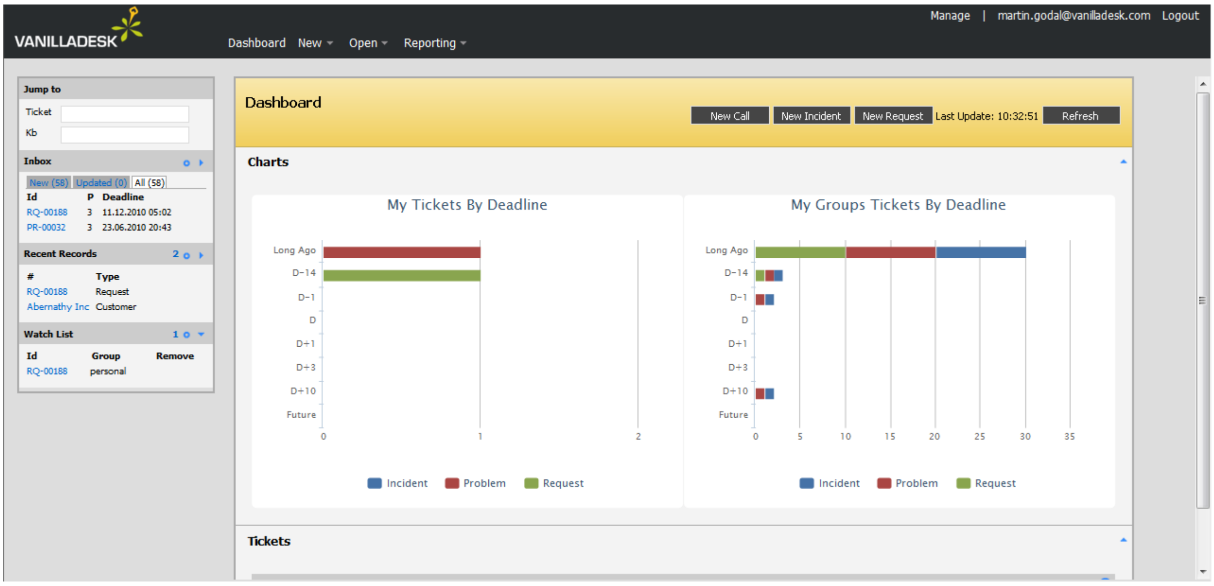
Your VanillaDesk Team

1.1 ABOUT THIS QUICK START GUIDE

This Getting Started Manual will help you to set up your VanillaDesk application. Furthermore, it will introduce you to the basic features and operation.

2. FIRST STEPS IN VANILLADESK

2.1 USER SCREEN



Menu Selection:

Dashboard - shows you dashboard screen
New Call, Incident, Request, Problem - allows you to create a new record.
Open Call, Incident, Request, Problem, Knowledge base - allows you to list, search and open existing records
Reporting - lead you in reporting functionality
Manage - application management console

Left panel:

Jump to - fast jump to a requested ticket or Knowledge base record
Inbox - shows the list of new, updated and all tickets that are assigned to you or to your resolution groups and are not assigned to a particular user
Recent Records - shows the list of recent records (Incident, Request, User, Customer, Person, CI, ...)
Watch List - allows you to list selected Incident, Request, Problem on the Dashboard

Chart:

My Tickets by Deadline - shows your all open tickets
My Group Tickets by Deadline - shows all open tickets assigned to your resolution groups

Tickets:

The list of tickets (Incidents, Requests or Problem) displayed by clicing on the chart.

3. BEFORE YOU CREATE A FIRST TICKET

VanillaDesk comes with preloaded data to ensure, that you can start working with it in a couple of moments.*The preloaded data can be altered to suit your company's needs.*

This part of the Quick Start Guide will lead you through the administration part of the application. As all configurations are done from the management screen, most parts of the guide will start there.

You can get to the management screen using the "Manage" button in the top right part of the screen.

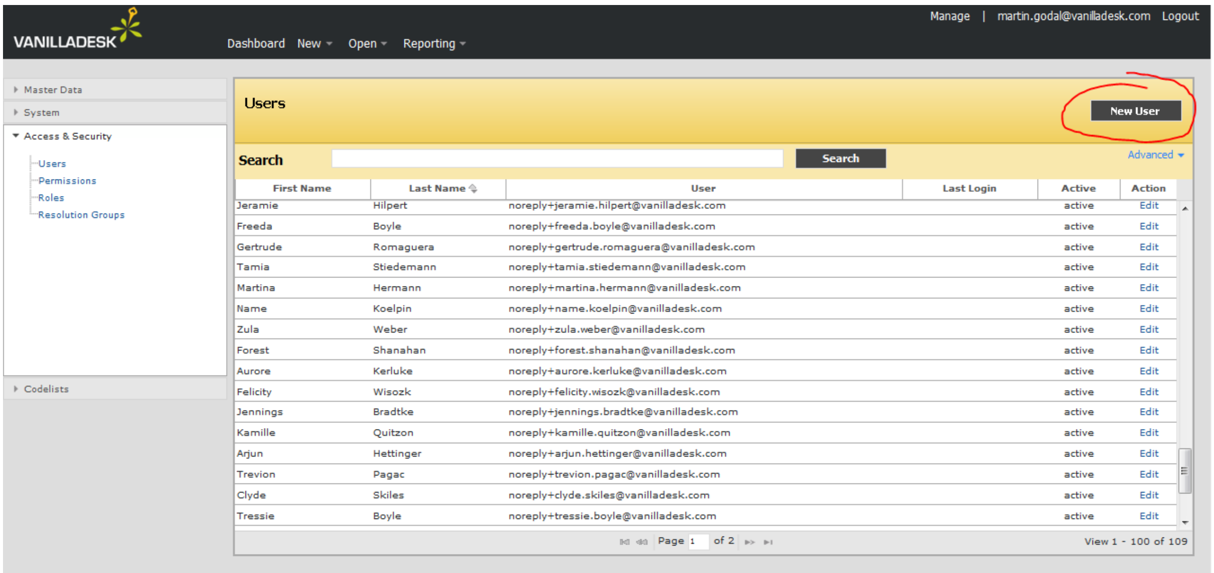
3.1 USERS

User is a Service Desk user (Service Desk manager, operator or member of a resolution group). By default, VanillaDesk comes with one pre-configured user, the creator of the site. In order for other users to be able to log in to the application, new user accounts need to be created.

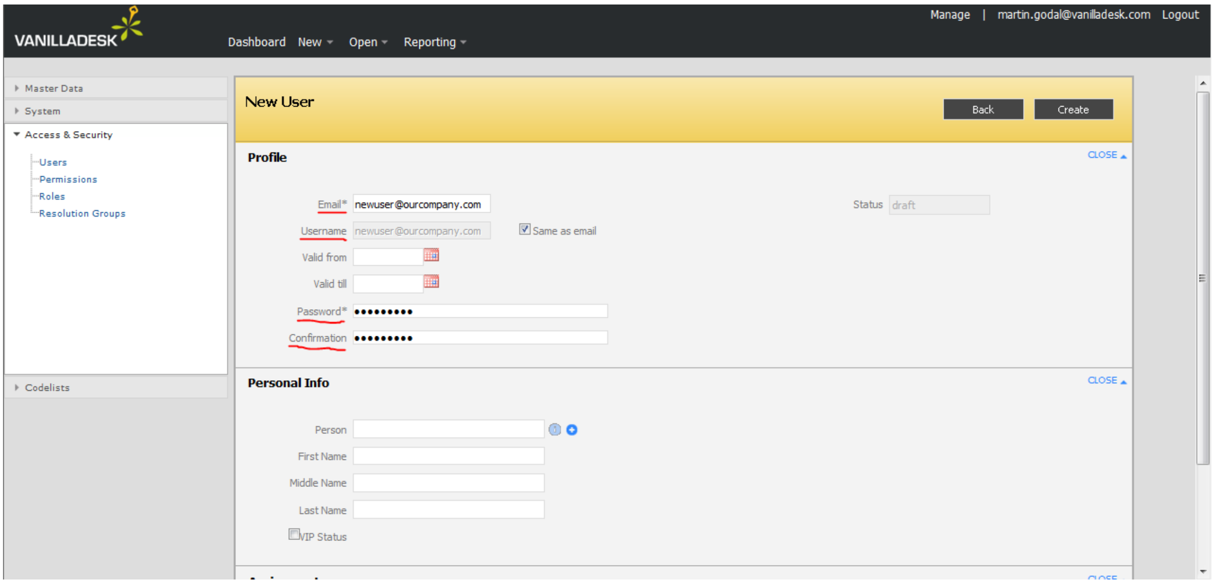
To create new user accounts:

1. In the management screen choose **Access & Security** > **Users**

2. Click the **New user** button.



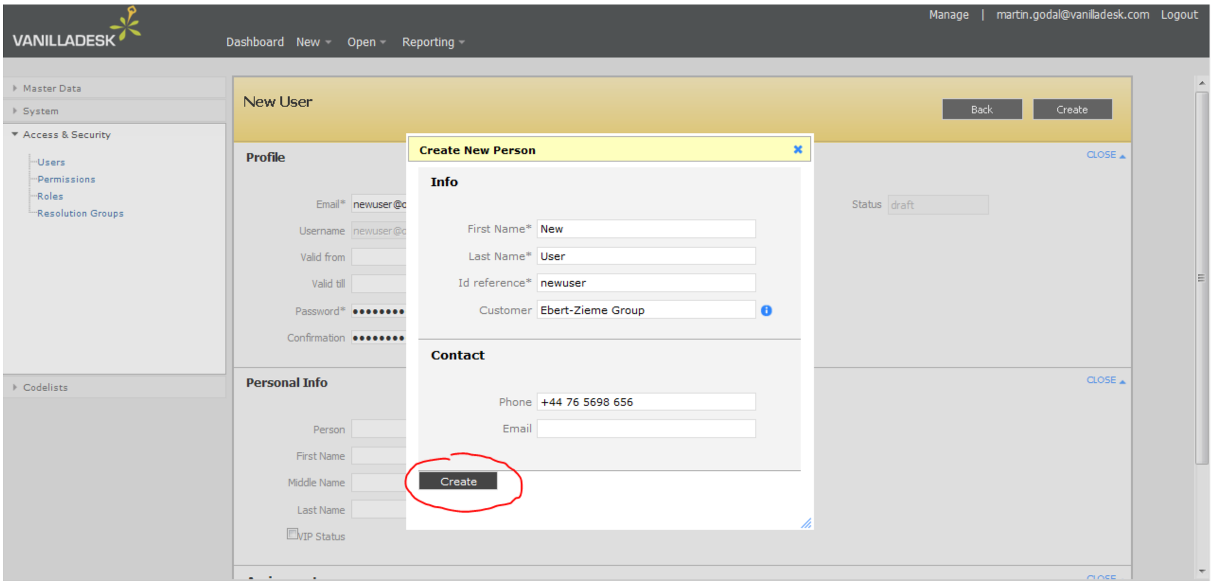
3. Once the new user form opens, fill in all required fields in the Profile panel



Email, User name, Password (and its confirmation) are mandatory.

4. As this user is new to the system, it is recommended to create/link personal data to him/her.

To create new personal data, click the button right next to the "Person" field in the "Personal Info" panel. In the modal window, fill in all necessary fields and click the **Create** button.

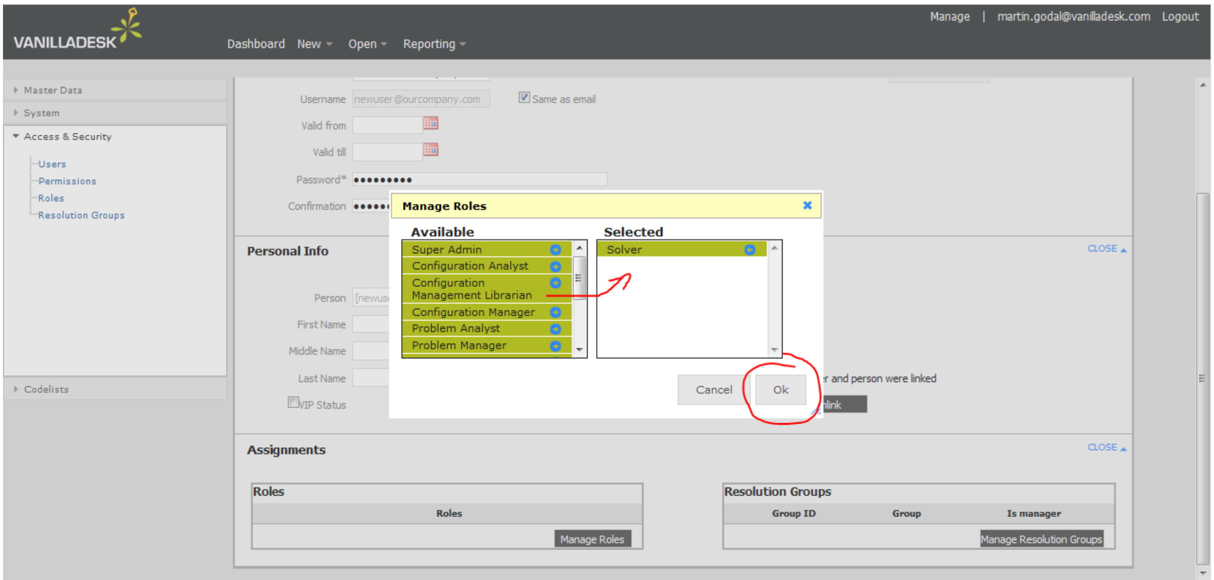


As Customer, select your own company, if the user is your employee.

The newly created personal data will automatically be linked to the user.

5. Assign the new user to a role by clicking the **Manage Roles** button.

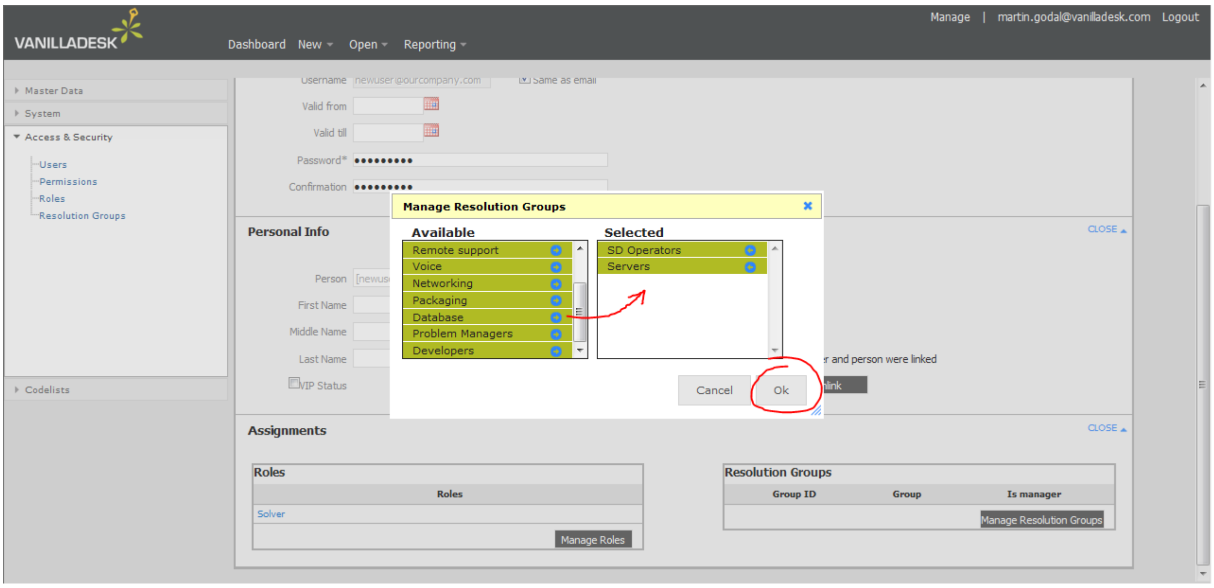
In the modal window, use drag'n'drop, double click or the arrow buttons next to the available roles to select them. When you are finished, click the **Ok** button.



Roles are necessary for determining the users permissions to view specific parts of the application.

6. Assign the new user to resolution groups by clicking the **Manage Resolution Groups** button

The principle of the modal window is the same as for roles, so use drag'n'drop, double click or the arrow buttons next to the available resolution groups to select them. When you are finished, click the **Ok** button.



Resolution groups are necessary for assigning tickets (incidents, requests, ...) to people responsible for solving them.

7. Finally, click the **Create** button located in the top-right corner of the new user form.

At this point, the new user has been created and he will receive a notification email with how to login to VanillaDesk. Repeat these steps for each user you wish to create.

3.2 CUSTOMERS

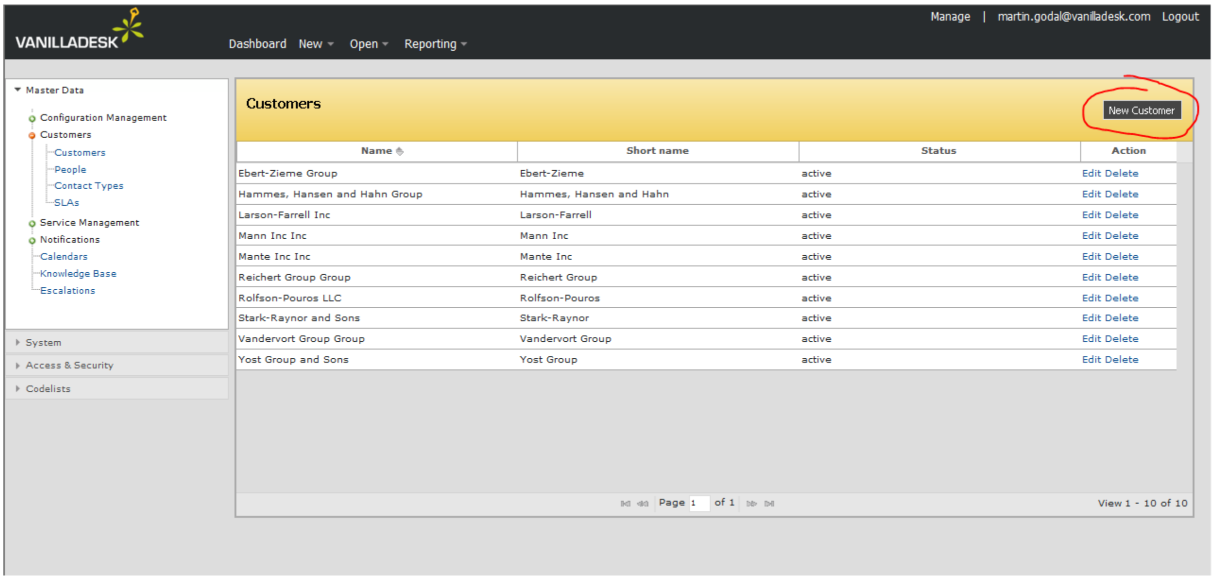
New VanillaDesk site comes with one Customer created by default that represents your company. *If you are using VanillaDesk for internal purposes only, you can skip setting up customers.*

If you are providing support for several Customers, it is recommended, that you add them at this time.

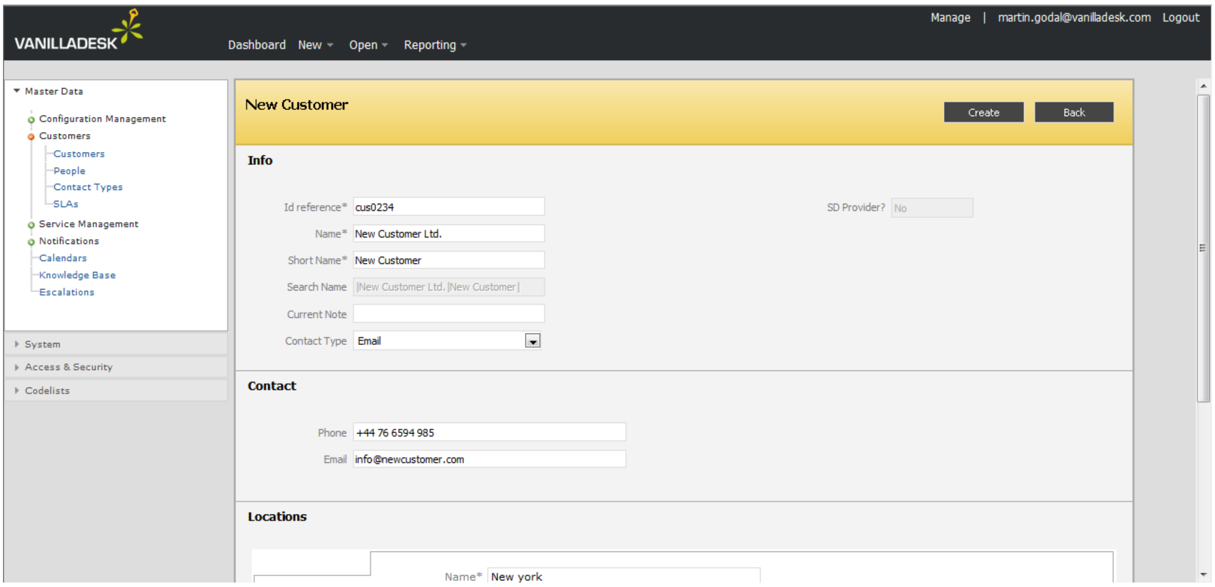
To create new customers:

1. In the management screen choose **Master data** > **Customers** > **Customers**

2. Click the **New customer** button.

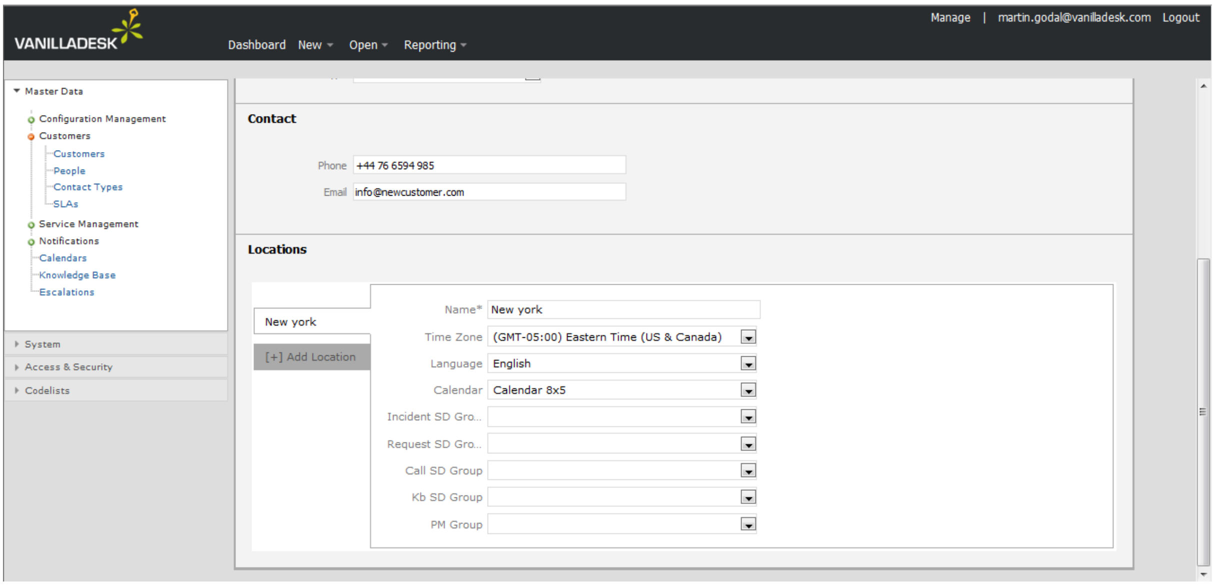


3. Once the new user form opens, fill in all required fields in the Info panel



Id reference, Name and Short name fields are mandatory

4. We also recommend filling in the contact and locations panels. This is, however, not required.



Especially, the "Time zone" allows for correct ticket timing if you have customers situated across different zones.

5. Click the **Create** button located in the top-right corner of the new customer form

At this point, the new customer has been created and is ready to be used. Repeat this process for all your customers.

3.3 SERVICES AND SERVICE LEVEL AGREEMENTS (SLAS)

Your company is providing some services to your customers (or internally, if you provide internal support). Additionally, you and your customers have agreements, that you will restore these services should they fail. These agreements are called Service Level Agreements or SLAs.

To take full advantage of this during a tickets life time (for monitoring and reporting purposes), services and SLAs must be created.

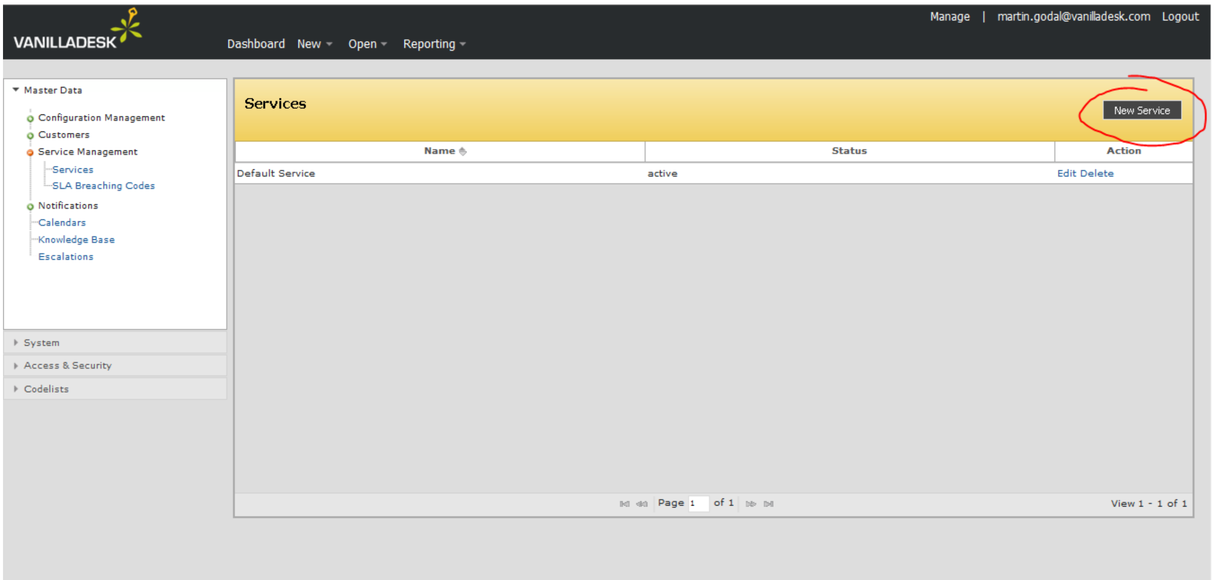
VanillaDesk comes with one pre-defined service ("Default service") and one pre-configured SLA ("Default SLA"). *So, if you are using Vanilladesk for internal purposes only, you can skip this step, however, we advise to, at least, browse briefly through the services and SLAs for better understanding the concept.*

3.3.1 SERVICES

To create a new service, you need to:

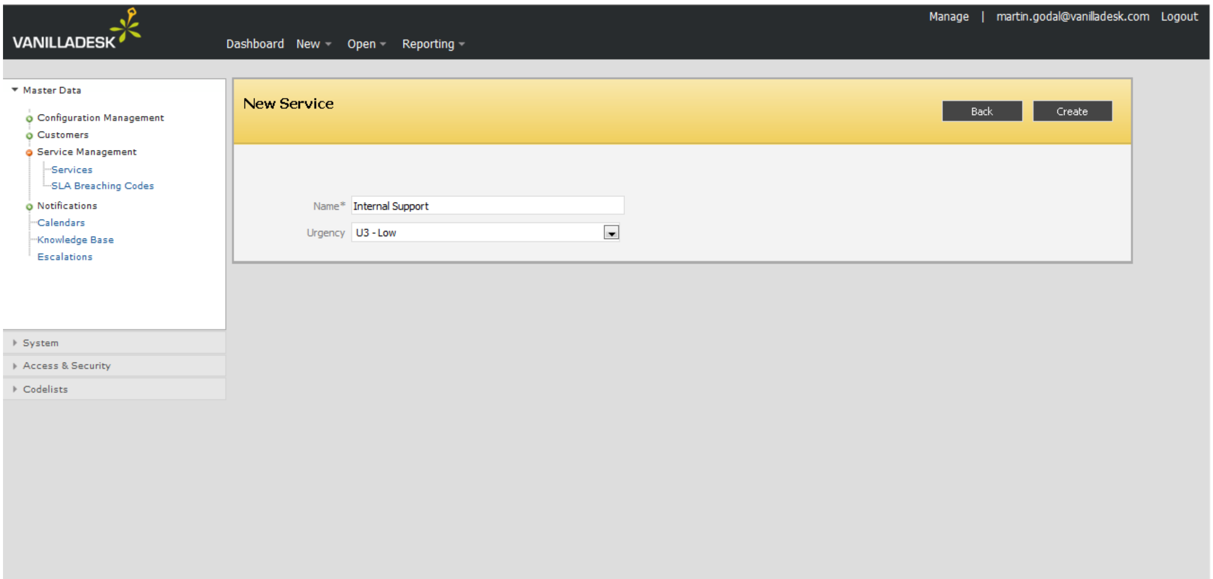
1. In the management screen choose **Master data** > **Service management** > **Services**

2. Click the **New service** button



3. Fill in the Service name and urgency.

You can be very general at this point (for example "Internal support"), because a more detailed specification can be configured later on.



4. Click the **Create** button located in the top-right corner of the new service form

The new service has been created.

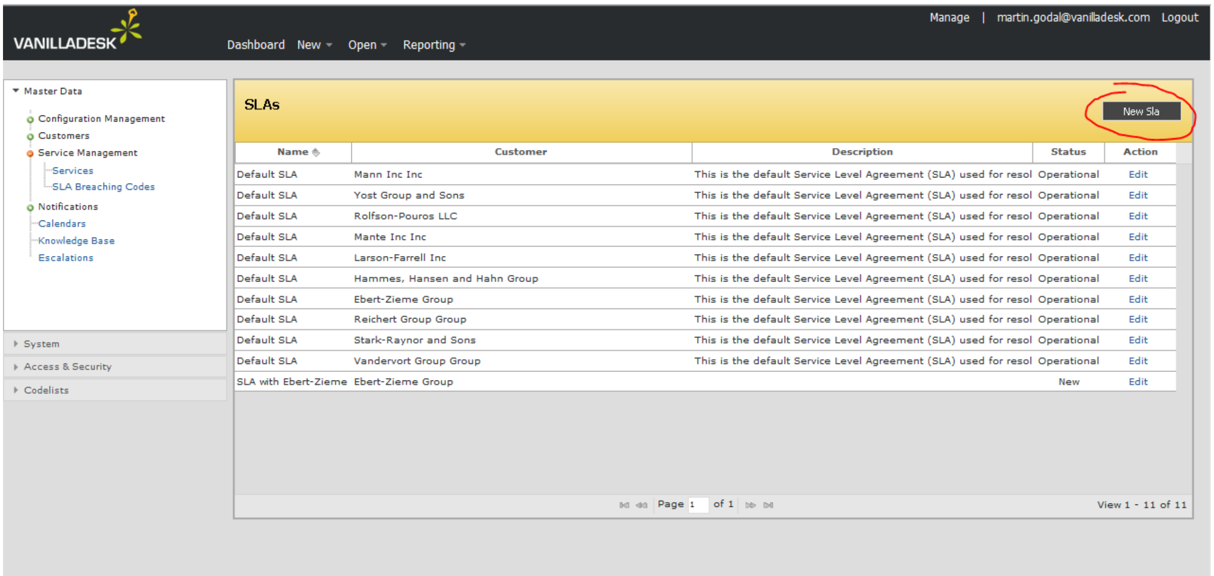
3.3.2 SLAS

If the services and customers have been configured, you need to setup which services are available to which customers under what conditions. All this is configured in the SLA.

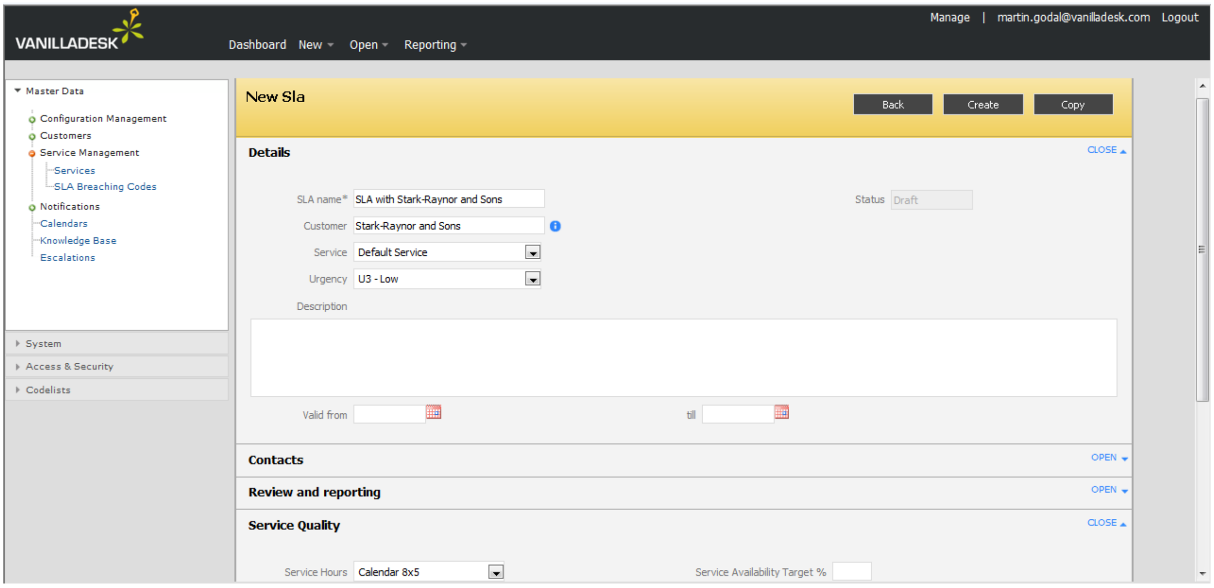
To create a new SLA, you need to:

1. In the management screen choose **Master data** > **Customers** > **SLAs**

2. Click the **New SLA** button

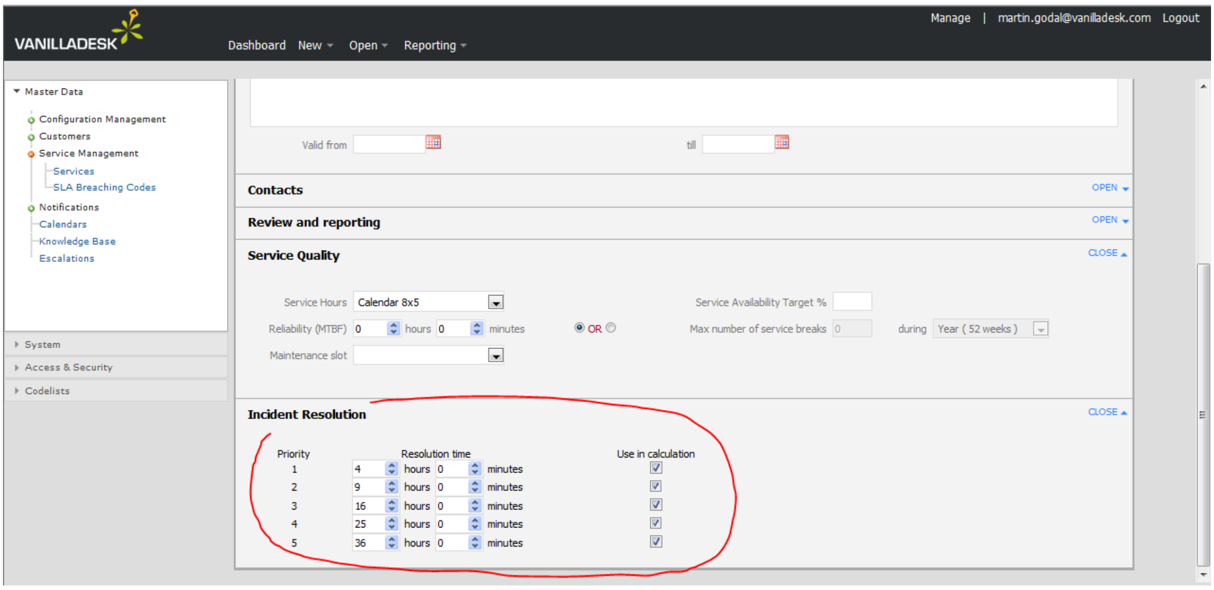


3. Fill in the necessary fields



***SLA name**, **Customer**, **Service** and **Urgency** are mandatory fields. Also **Service Hours** in the Service quality panel need to be filled in.*

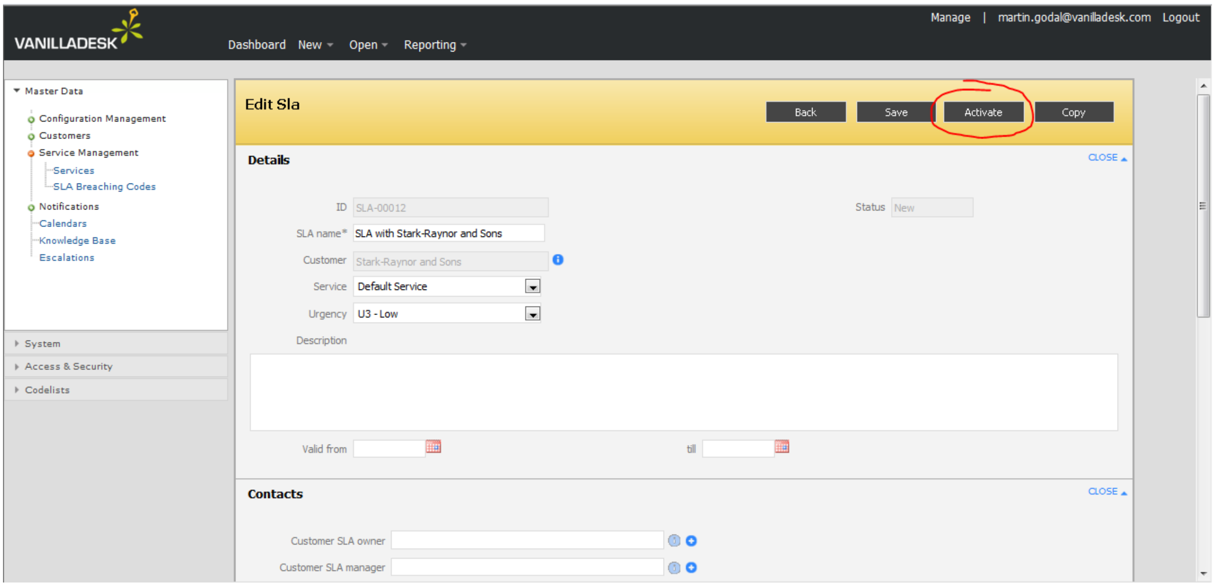
4. To take the full advantage of this functionality, we recommend also filling in the resolution times for incidents.



These times are the agreed deadlines to which incidents of particular priority need to be resolved and they will be used for all deadline calculations for reporting purposes.

5. Click the **Create** button located in the top-right corner of the new SLA form.

6. New SLA are created inactive to enable a closer control which services are available for particular customers. If you want to activate the SLA right away, click the **Activate** button located in the top-right corner of the new SLA form.



At this point, the SLA has been created and activated. The support for this service is now available. The fields, that were left empty during the SLA creation can be changed later.

3.4 CATEGORIZATION

The most challenging task when setting up VanillaDesk is defining categories for tickets. The main purpose of categories is to separate tickets into specific groups.

Example: printer issues can be categorized as Hardware>Printer>Connection failure, Internet explorer issues as Software>Desktop Applications>IE>Application error and so on. There are uncountable options for configuring these categories.

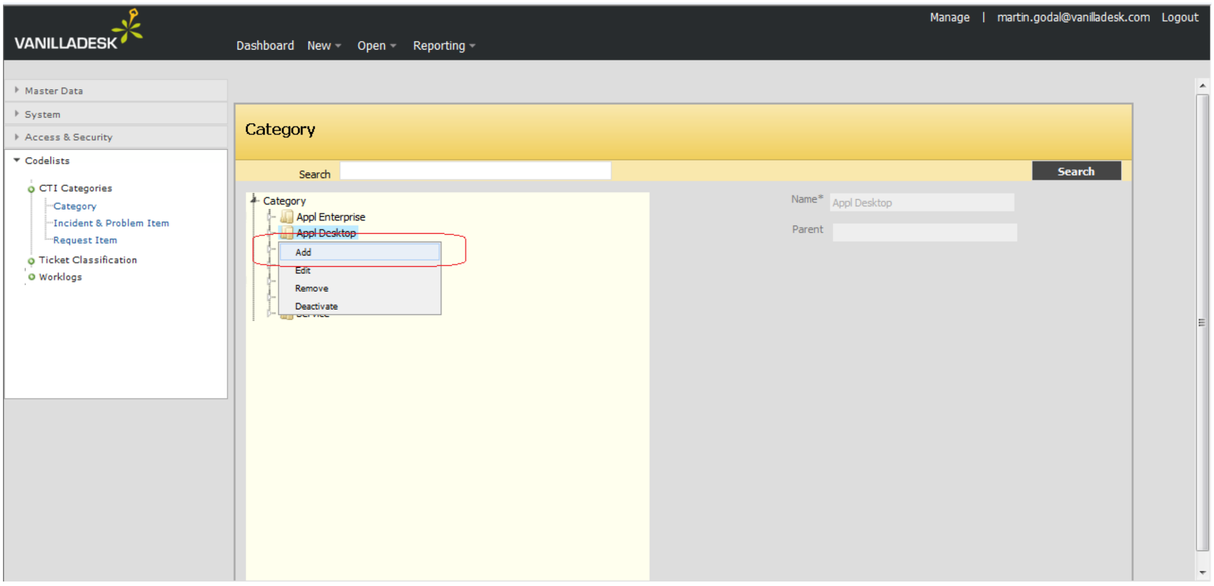
For your convenience, VanillaDesk comes with a pre-configured set of categories for tickets. These can be used right away. In time, you may want to alter them to suit your company's needs.

Categories are represented in hierarchical form. This allows for better orientation.

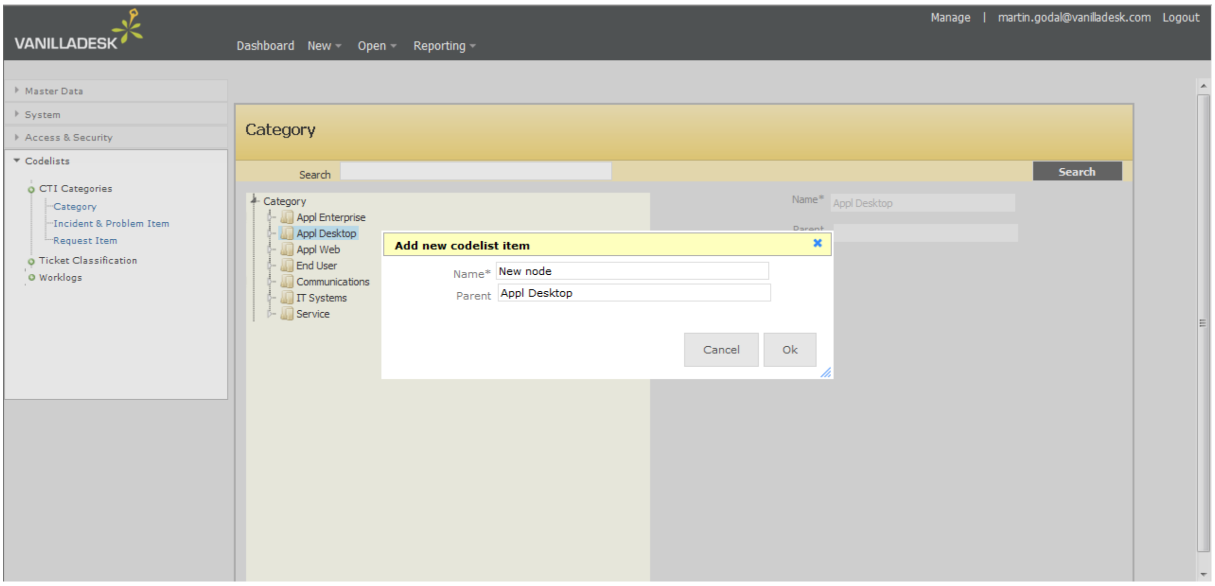
In order to create a new category for a ticket, you need to:

1. In the management screen choose **Codelists** > **CTI Categories** > **Category**. A pre-defined tree of categories will be shown.

2. Add a new node to the hierarchy. This is done via right-click on an existing node, that will serve as a parent for the newly created node and selecting **Add**.



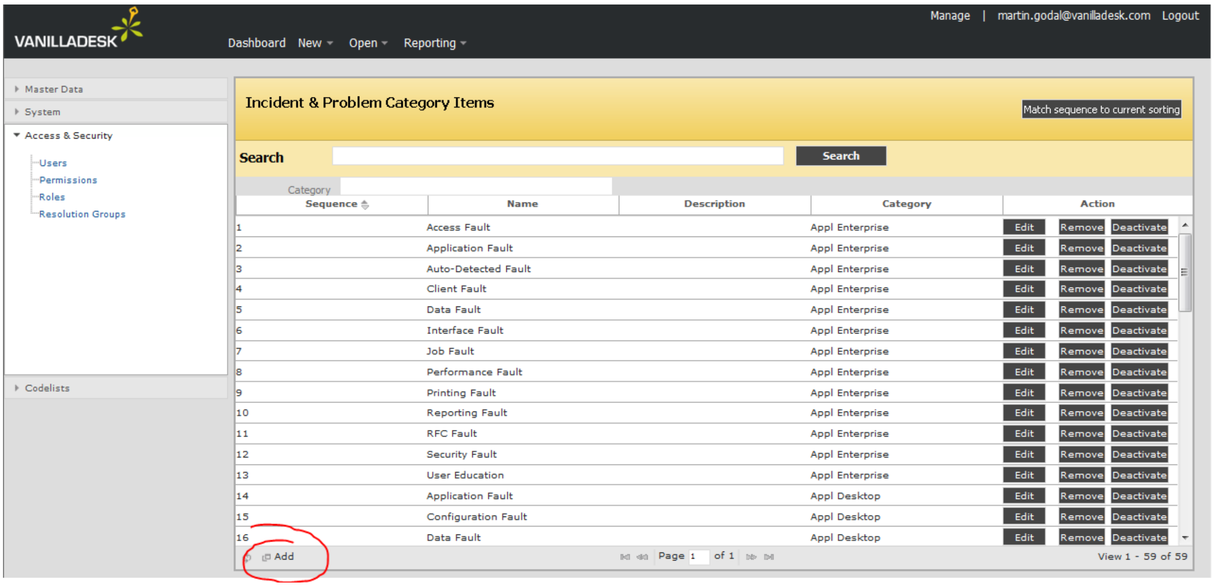
3. Fill in the name of the new node. Once you are done, click the **Ok** button.



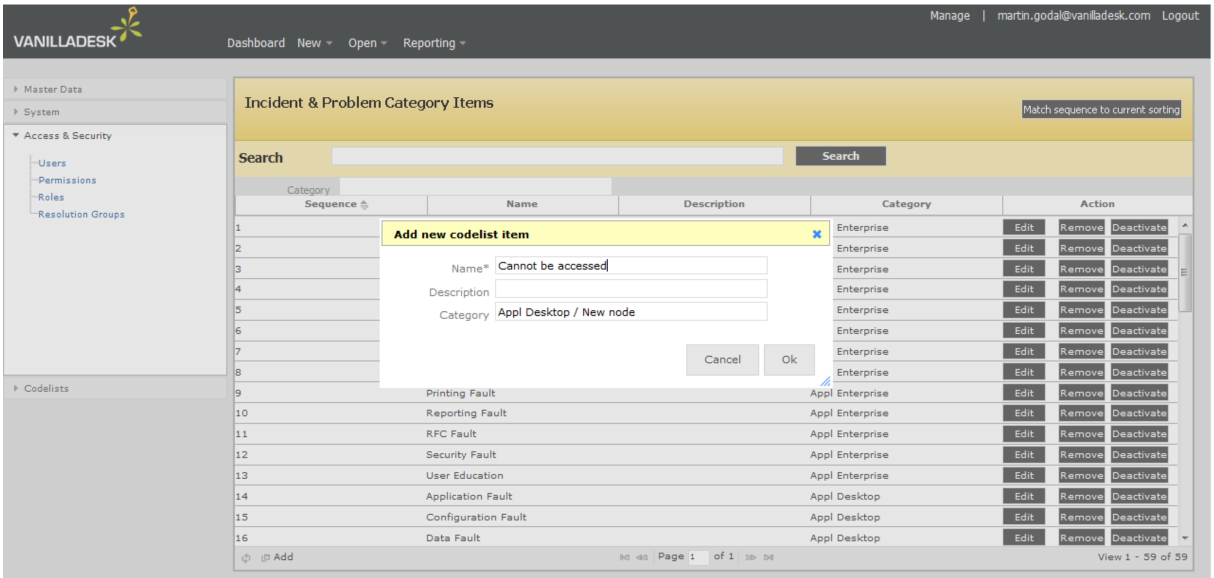
You will see the new node in the hierarchy.

4. Now go to **Codelists** > **CTI Categories** > **Incident & Problem Item**. A list of pre-defined issue types is shown.

5. Click the **Add** button located on the bottom-left part of the screen.



6. In the modal window, enter an issue type (name) and locate your newly created node in the category field.



For category Printer, the issue type can be "Cannot be accessed" (if a network printer cannot be found in the printer list)

7. Click the **Ok** button

The category and an issue type has been created and can be used to classify tickets.

4. CREATING NEW INCIDENTS

Congratulation! Now you can create your first Incident record. The details are coming soon.

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