

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.

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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 development. We hope that you enjoy working with VanillaDesk as much as we do!

Yours sincerely,

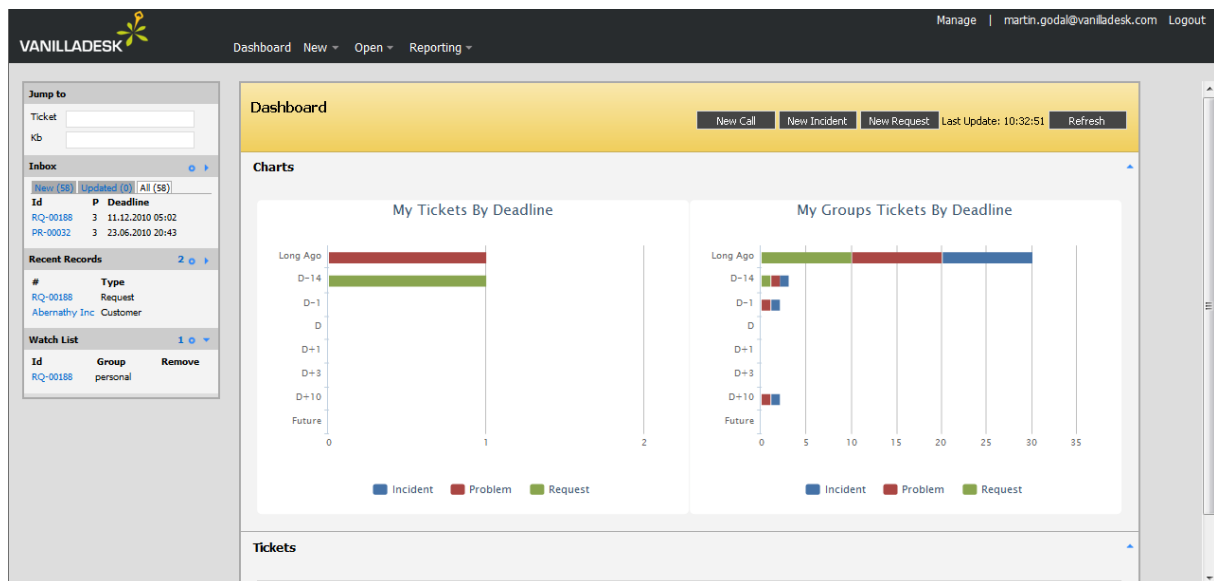
Your VanillaDesk Team

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 clicking 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.

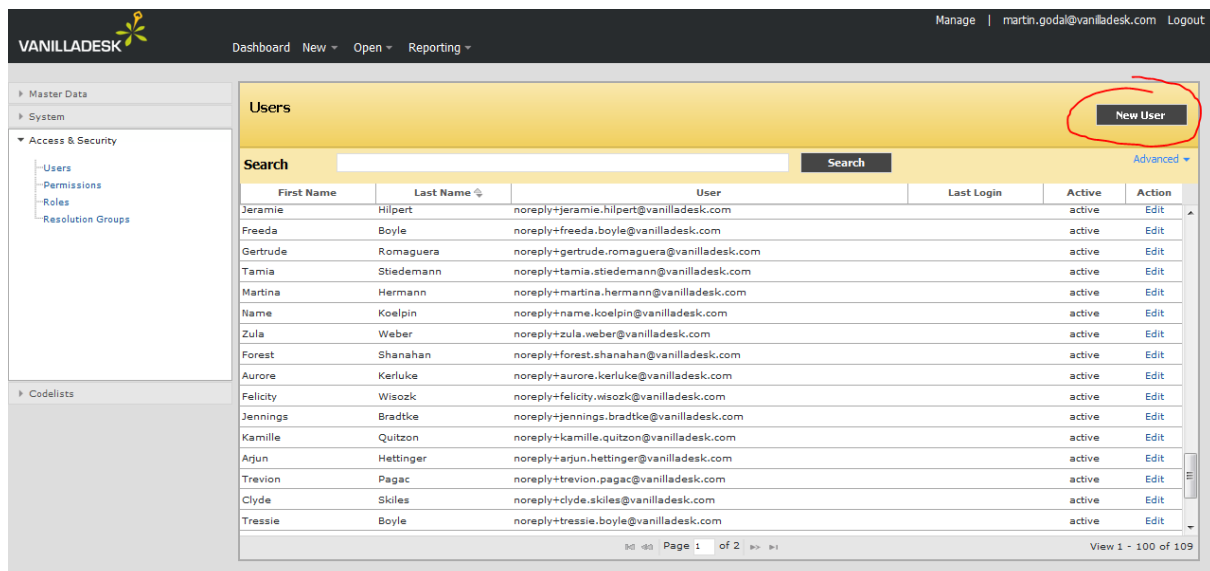
You can get to the management screen using the "Manage" button in the top right part of the screen.

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.




The screenshot shows the VanillaDesk interface. The top navigation bar includes 'Dashboard', 'New', 'Open', and 'Reporting'. The left sidebar shows a tree view with 'Access & Security' expanded, containing 'Users', 'Permissions', 'Roles', and 'Resolution Groups'. The main content area is titled 'Users' and features a 'New User' button circled in red. Below the button is a search bar and a table of users.

First Name	Last Name	User	Last Login	Active	Action
Jeramie	Hilpert	noreply+jeramie.hilpert@vanilladesk.com		active	Edit
Freedra	Boyle	noreply+freedra.boyle@vanilladesk.com		active	Edit
Gertrude	Romaguera	noreply+gertrude.romaguera@vanilladesk.com		active	Edit
Tamia	Stiedemann	noreply+tamia.stiedemann@vanilladesk.com		active	Edit
Martina	Hermann	noreply+martina.hermann@vanilladesk.com		active	Edit
Name	Koelpin	noreply+name.koelpin@vanilladesk.com		active	Edit
Zula	Weber	noreply+zula.weber@vanilladesk.com		active	Edit
Forest	Shanahan	noreply+forest.shanahan@vanilladesk.com		active	Edit
Aurora	Kerluke	noreply+aurora.kerluke@vanilladesk.com		active	Edit
Felicity	Wisozk	noreply+felicity.wisozk@vanilladesk.com		active	Edit
Jennings	Bradtko	noreply+jennings.bradtko@vanilladesk.com		active	Edit
Kamille	Quitzon	noreply+kamille.quitzon@vanilladesk.com		active	Edit
Arjun	Hettinger	noreply+arjun.hettinger@vanilladesk.com		active	Edit
Trevion	Pagac	noreply+trevion.pagac@vanilladesk.com		active	Edit
Clyde	Skiles	noreply+clyde.skiles@vanilladesk.com		active	Edit
Tressie	Boyle	noreply+tressie.boyle@vanilladesk.com		active	Edit

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.

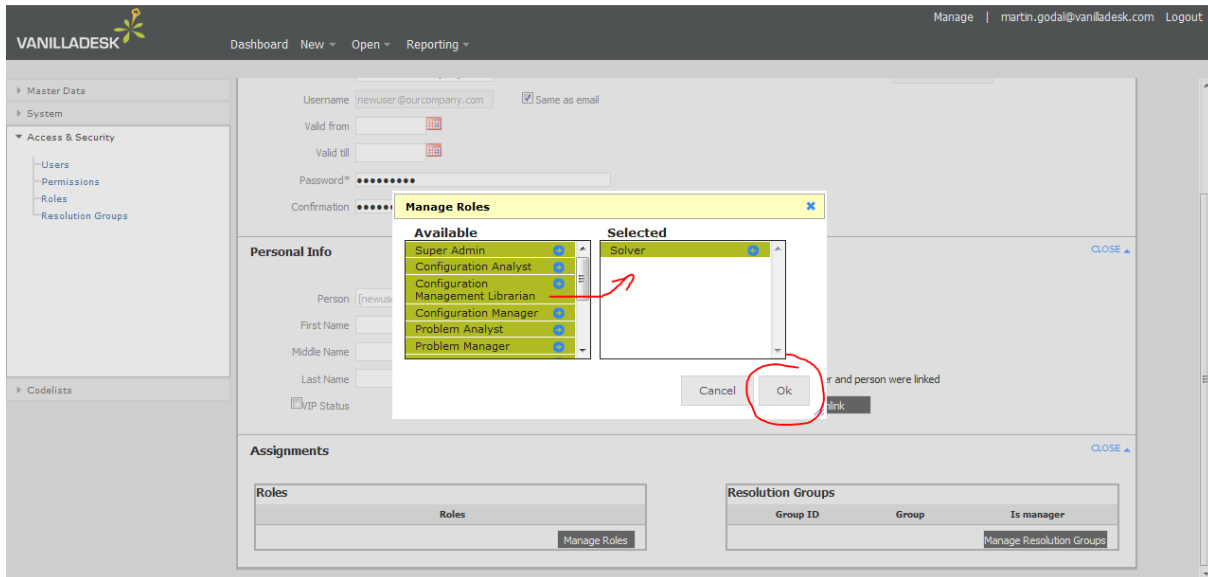
To create new personal data, click the  button right next to the "Person" field in the "Personal Info" panel. In the modal window, fill in all necessary fields and click the **Create** button.

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.

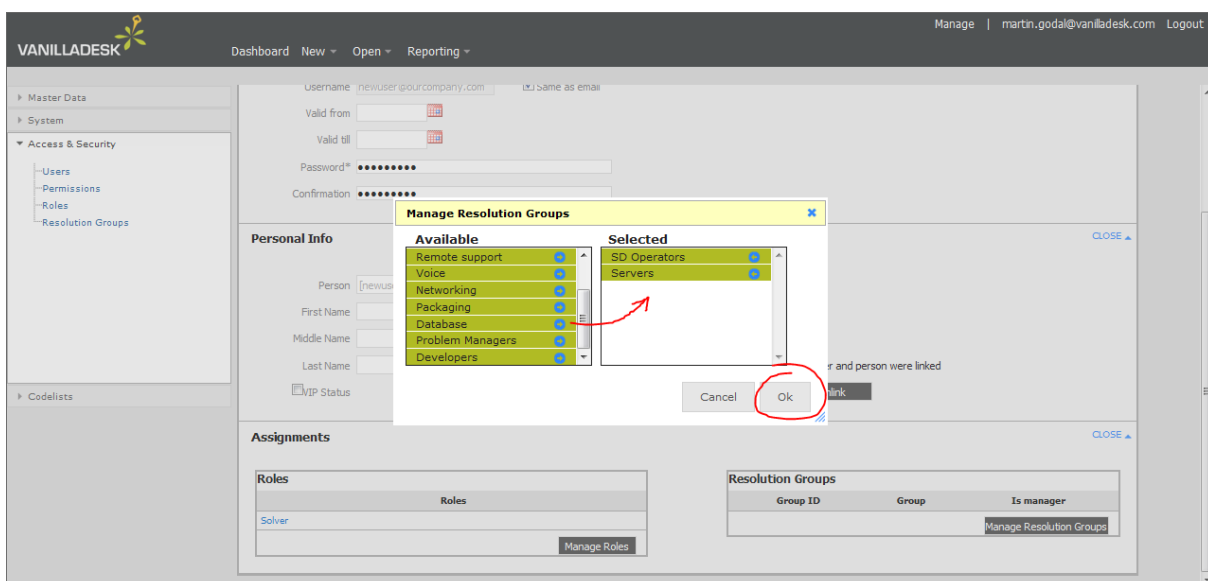
In the modal window, use drag'n'drop, double click or the arrow buttons next to the available roles to select them. When you are finished, click the **Ok** button.



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.

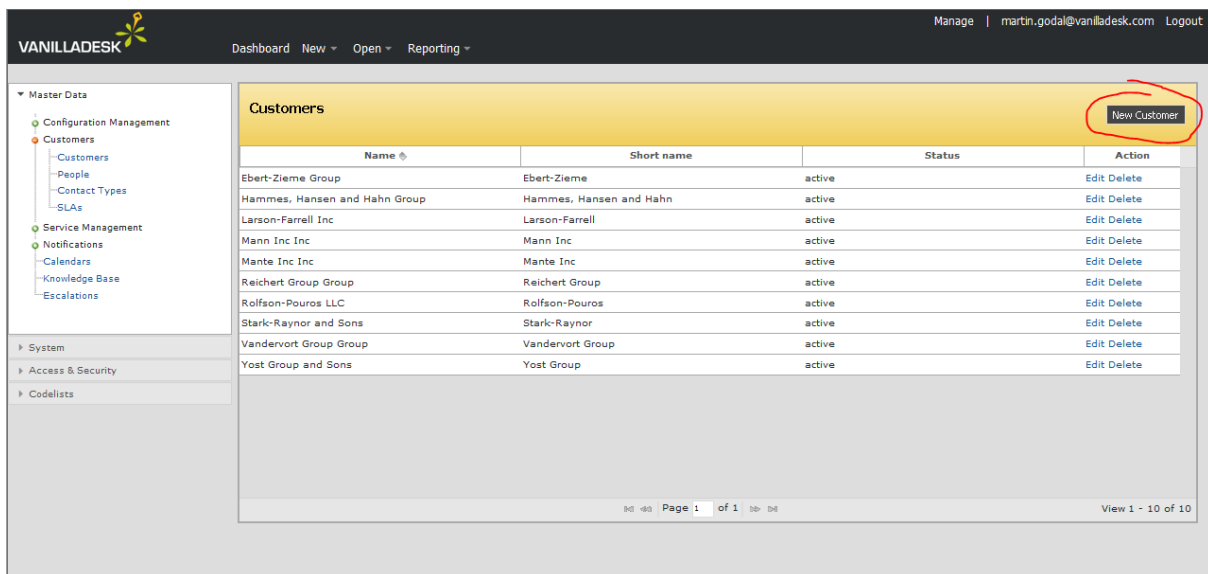
3.2 CUSTOMERS

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:

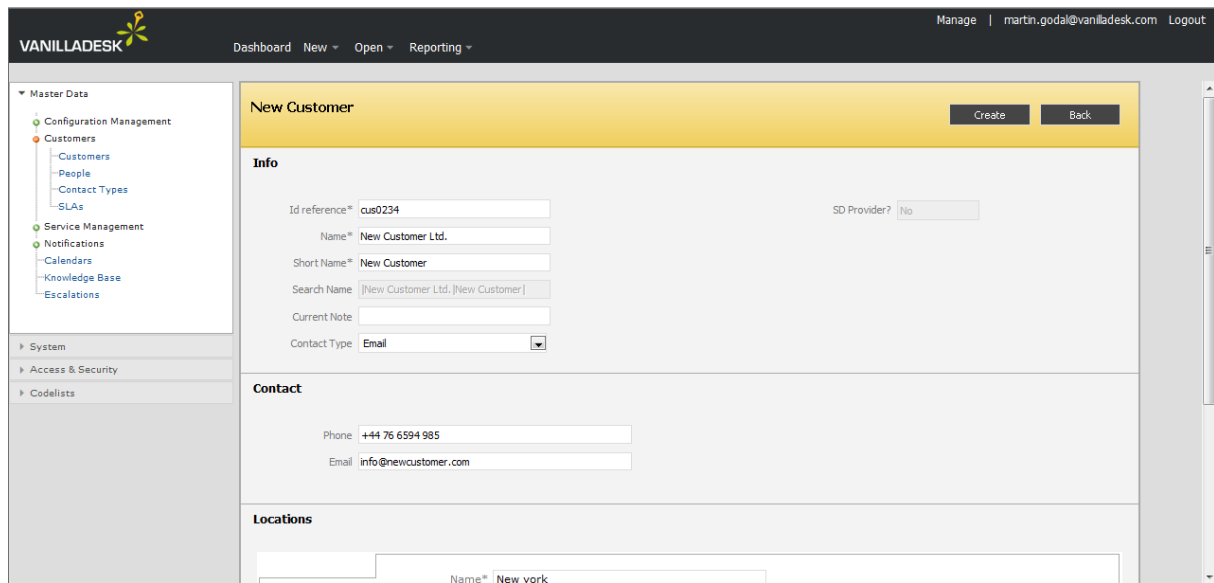
1. In the management screen choose **Master data > Customers > Customers**
2. Click the **New customer** button.



The screenshot shows the VanillaDesk interface. On the left is a sidebar with a tree view under 'Master Data' containing 'Configuration Management', 'Customers', 'People', 'Contact Types', 'SLAs', 'Service Management', 'Notifications', 'Calendars', 'Knowledge Base', and 'Escalations'. The main area is titled 'Customers' and contains a table with columns: Name, Short name, Status, and Action. The table lists several customers, all with 'active' status. A 'New Customer' button is located in the top right corner of the table area, circled in red. At the bottom of the table, there is a pagination bar showing 'Page 1 of 1' and 'View 1 - 10 of 10'.

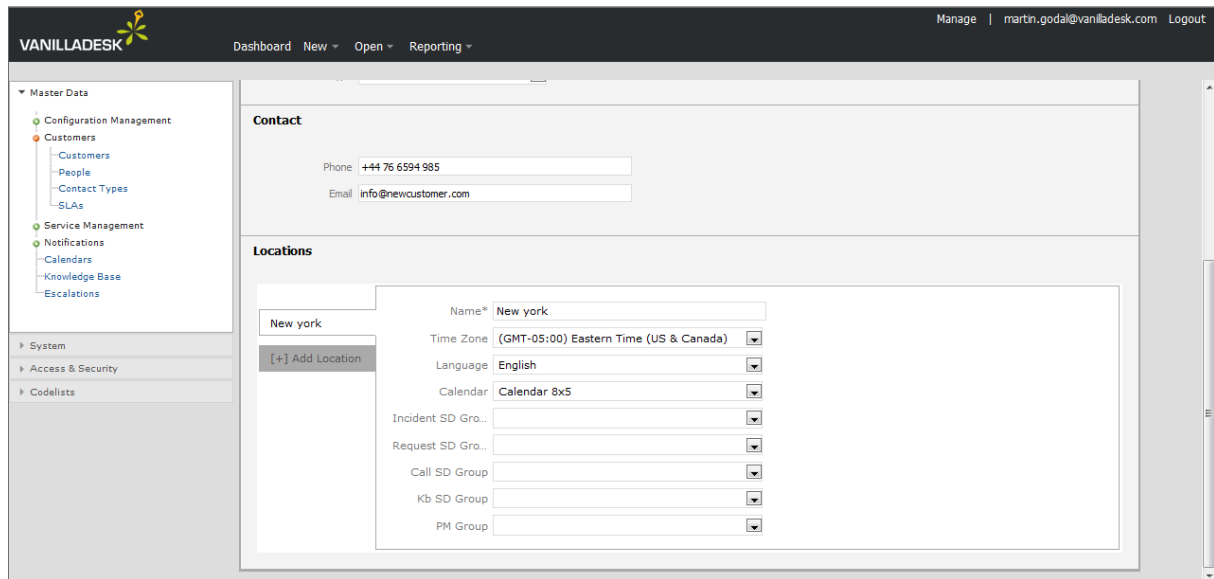
Name	Short name	Status	Action
Ebert-Zieme Group	Ebert-Zieme	active	Edit Delete
Hammes, Hansen and Hahn Group	Hammes, Hansen and Hahn	active	Edit Delete
Larson-Farrell Inc	Larson-Farrell	active	Edit Delete
Mann Inc Inc	Mann Inc	active	Edit Delete
Mante Inc Inc	Mante Inc	active	Edit Delete
Reichert Group Group	Reichert Group	active	Edit Delete
Rolfson-Pouros LLC	Rolfson-Pouros	active	Edit Delete
Stark-Raynor and Sons	Stark-Raynor	active	Edit Delete
Vandervort Group Group	Vandervort Group	active	Edit Delete
Yost Group and Sons	Yost Group	active	Edit Delete

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.

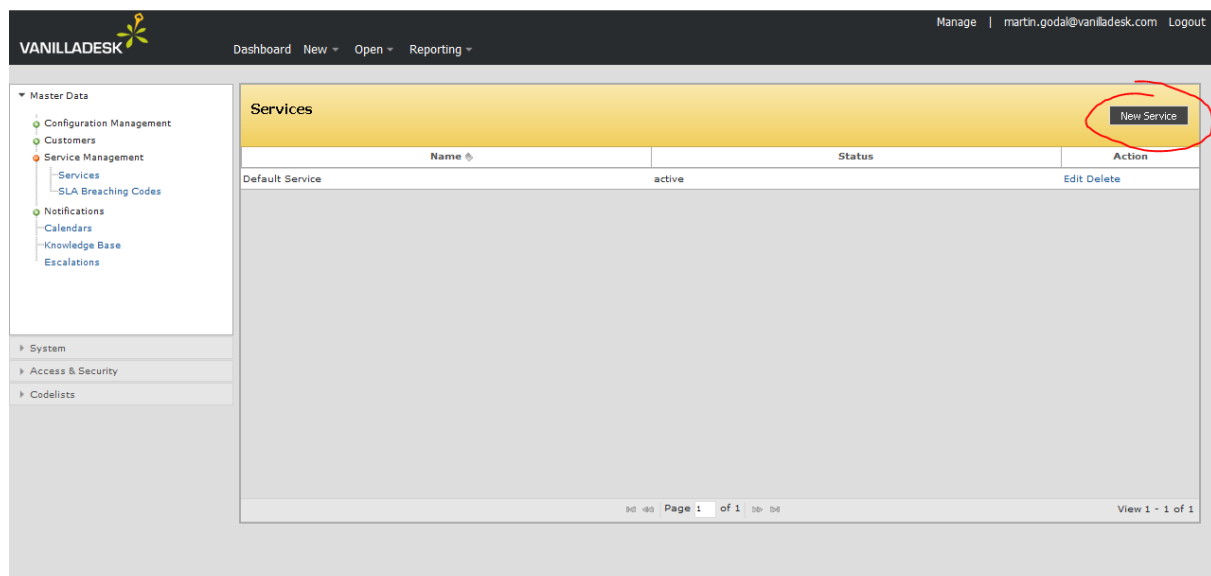
To take full advantage of this during a tickets life time (for monitoring and reporting purposes), services and SLAs must be created.

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

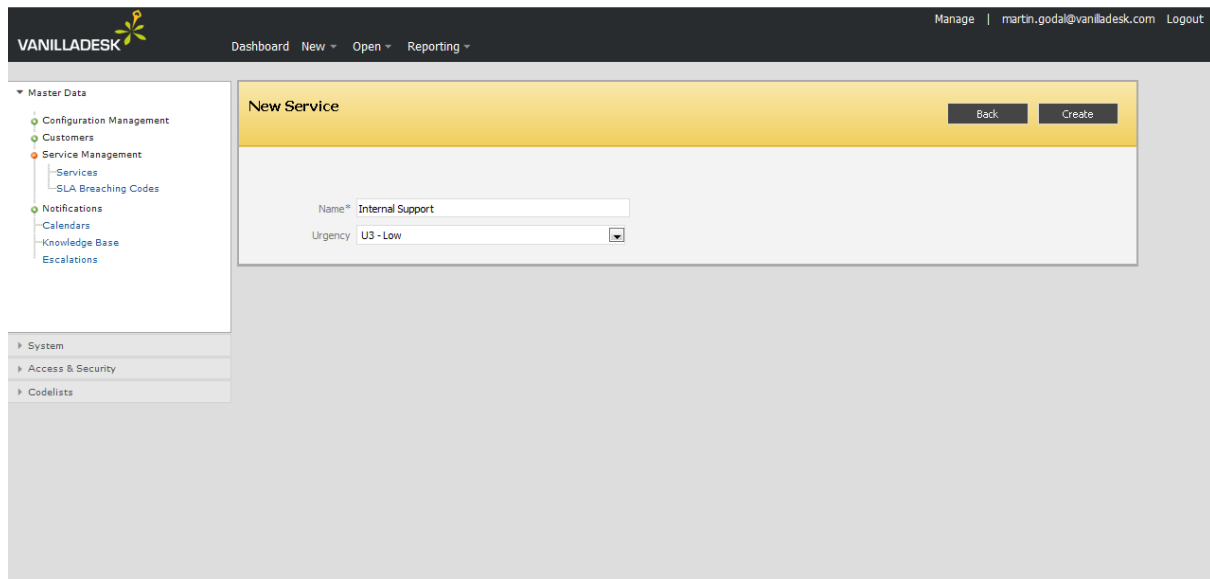
To create a new service, you need to:

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.



Master Data

- Configuration Management
- Customers
- Service Management
 - Services
 - SLA Breaching Codes
- Notifications
- Calendars
- Knowledge Base
- Escalations

System

Access & Security

Codellists

New Service

Back Create

Name* Internal Support

Urgency U3 - Low

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

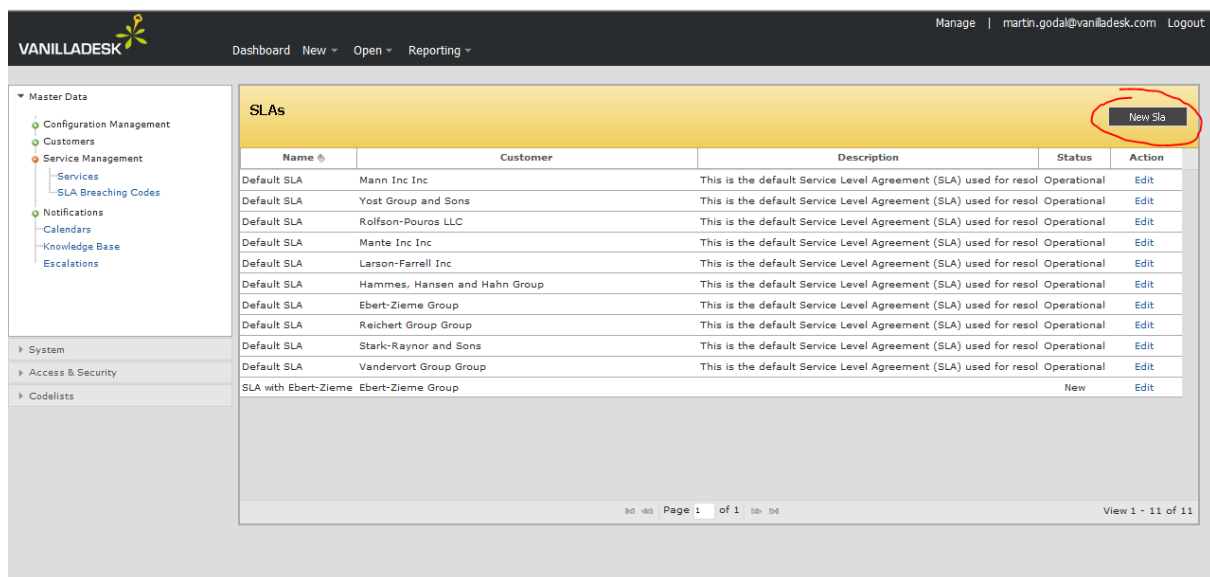
The new service has been created.

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



Master Data

- Configuration Management
- Customers
- Service Management
 - Services
 - SLA Breaching Codes
- Notifications
- Calendars
- Knowledge Base
- Escalations

System

Access & Security

Codellists

SLAs

New Sla

Name	Customer	Description	Status	Action
Default SLA	Mann Inc Inc	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Yost Group and Sons	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Rolfson-Pouros LLC	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Mante Inc Inc	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Larson-Farrell Inc	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Hammes, Hansen and Hahn Group	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Ebert-Zieme Group	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Reichert Group Group	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Stark-Raynor and Sons	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
Default SLA	Vandervort Group Group	This is the default Service Level Agreement (SLA) used for resol	Operational	Edit
SLA with Ebert-Zieme	Ebert-Zieme Group		New	Edit

Page 1 of 1

View 1 - 11 of 11

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.

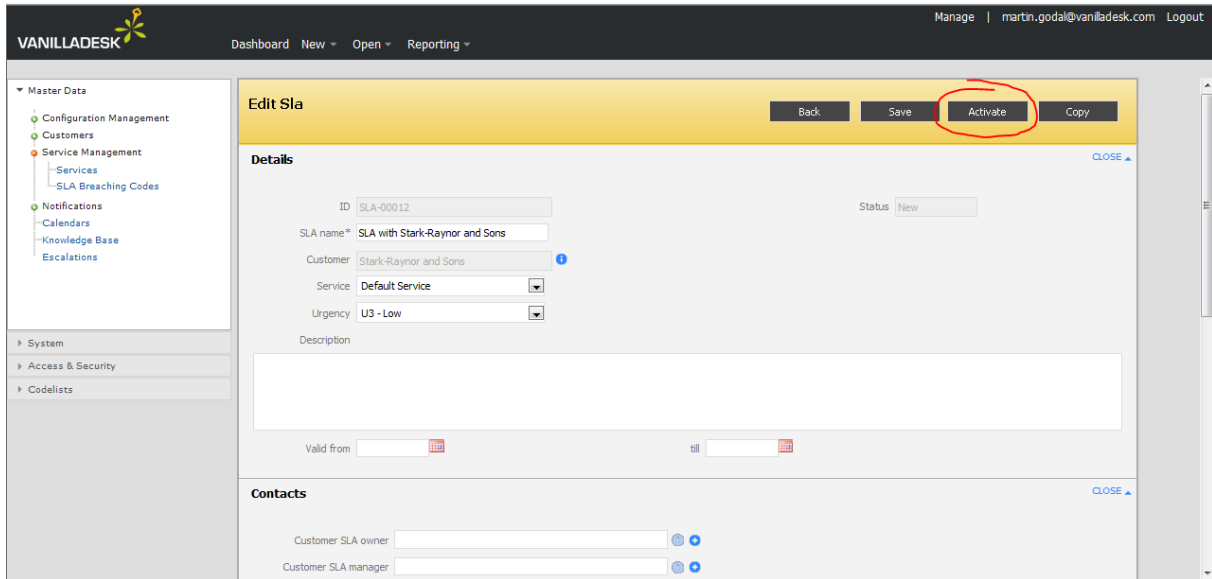
4. To take the full advantage of this functionality, we recommend also filling in the resolution times for incidents.

Priority	Resolution time	Use in calculation
1	4 hours 0 minutes	<input checked="" type="checkbox"/>
2	9 hours 0 minutes	<input checked="" type="checkbox"/>
3	16 hours 0 minutes	<input checked="" type="checkbox"/>
4	25 hours 0 minutes	<input checked="" type="checkbox"/>
5	36 hours 0 minutes	<input checked="" type="checkbox"/>

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.



The screenshot shows the 'Edit SLA' form in the VanillaDesk interface. The form is titled 'Edit SLA' and has a yellow header bar. In the top right corner of the header bar, there are four buttons: 'Back', 'Save', 'Activate', and 'Copy'. The 'Activate' button is circled in red. Below the header bar, the form is divided into two sections: 'Details' and 'Contacts'. The 'Details' section contains fields for 'ID' (SLA-00012), 'SLA name' (SLA with Stark-Raynor and Sons), 'Customer' (Stark-Raynor and Sons), 'Service' (Default Service), and 'Urgency' (U3 - Low). There is also a 'Status' field set to 'New'. The 'Contacts' section has fields for 'Customer SLA owner' and 'Customer SLA manager'. The left sidebar shows a navigation menu with categories like 'Master Data', 'System', 'Access & Security', and 'Codelists'.

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.

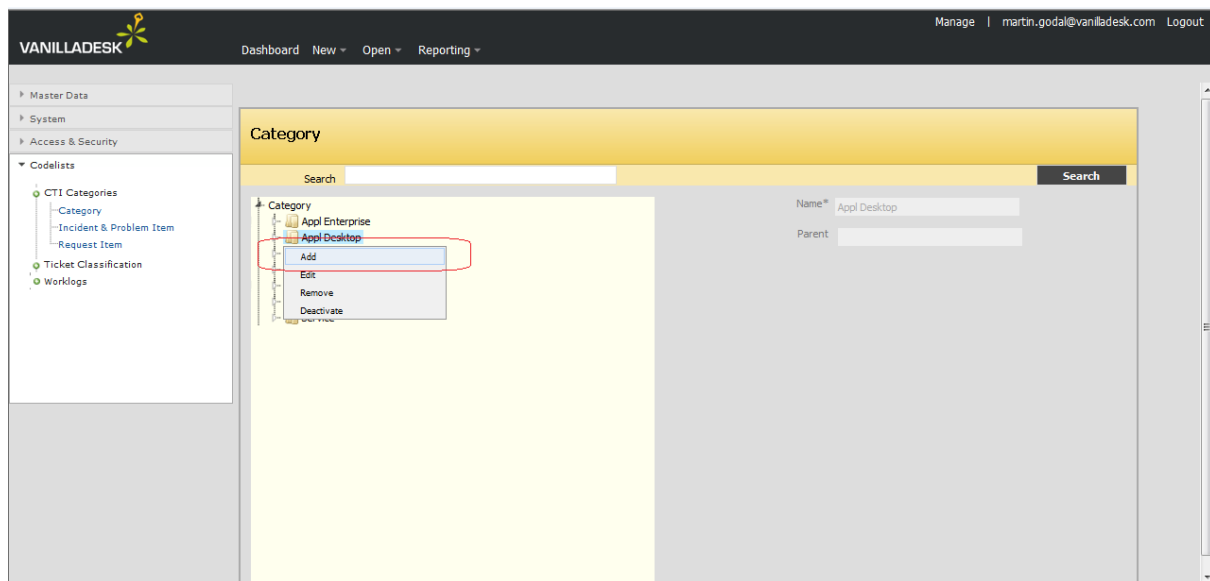
Example: printer issues can be categorized as Hardware>Printer>Connection failure, Internet explorer issues as Software>Desktop Applications>IE>Application error and so on. There are uncountable options for configuring these categories.

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.

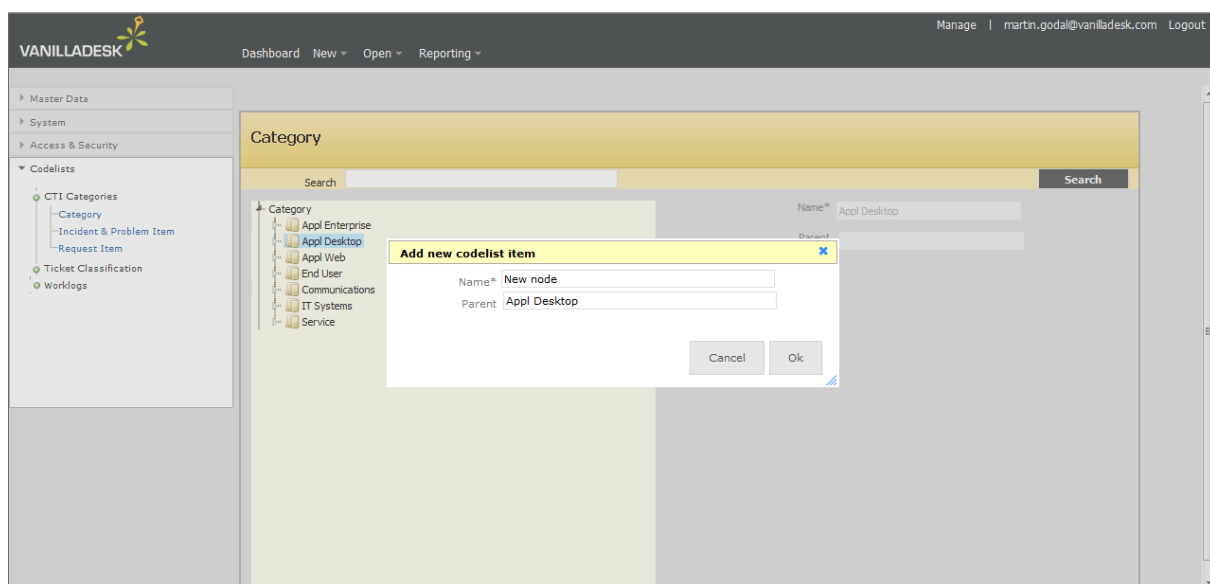
Categories are represented in hierarchical form. This allows for better orientation.

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.

VANILLADESK Dashboard New Open Reporting Manage | martin.godal@vanilladesk.com Logout

Master Data System Access & Security Users Permissions Roles Resolution Groups Codelists

Incident & Problem Category Items

Match sequence to current sorting

Search Search

Sequence	Name	Description	Category	Action
1	Access Fault		Appl Enterprise	Edit Remove Deactivate
2	Application Fault		Appl Enterprise	Edit Remove Deactivate
3	Auto-Detected Fault		Appl Enterprise	Edit Remove Deactivate
4	Client Fault		Appl Enterprise	Edit Remove Deactivate
5	Data Fault		Appl Enterprise	Edit Remove Deactivate
6	Interface Fault		Appl Enterprise	Edit Remove Deactivate
7	Job Fault		Appl Enterprise	Edit Remove Deactivate
8	Performance Fault		Appl Enterprise	Edit Remove Deactivate
9	Printing Fault		Appl Enterprise	Edit Remove Deactivate
10	Reporting Fault		Appl Enterprise	Edit Remove Deactivate
11	RFC Fault		Appl Enterprise	Edit Remove Deactivate
12	Security Fault		Appl Enterprise	Edit Remove Deactivate
13	User Education		Appl Enterprise	Edit Remove Deactivate
14	Application Fault		Appl Desktop	Edit Remove Deactivate
15	Configuration Fault		Appl Desktop	Edit Remove Deactivate
16	Data Fault		Appl Desktop	Edit Remove Deactivate

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

VANILLADESK Dashboard New Open Reporting Manage | martin.godal@vanilladesk.com Logout

Master Data System Access & Security Users Permissions Roles Resolution Groups Codelists

Incident & Problem Category Items

Match sequence to current sorting

Search Search

Sequence	Name	Description	Category	Action
1			Enterprise	Edit Remove Deactivate
2			Enterprise	Edit Remove Deactivate
3			Enterprise	Edit Remove Deactivate
4			Enterprise	Edit Remove Deactivate
5			Enterprise	Edit Remove Deactivate
6			Enterprise	Edit Remove Deactivate
7			Enterprise	Edit Remove Deactivate
8			Enterprise	Edit Remove Deactivate
9	Printing Fault		Appl Enterprise	Edit Remove Deactivate
10	Reporting Fault		Appl Enterprise	Edit Remove Deactivate
11	RFC Fault		Appl Enterprise	Edit Remove Deactivate
12	Security Fault		Appl Enterprise	Edit Remove Deactivate
13	User Education		Appl Enterprise	Edit Remove Deactivate
14	Application Fault		Appl Desktop	Edit Remove Deactivate
15	Configuration Fault		Appl Desktop	Edit Remove Deactivate
16	Data Fault		Appl Desktop	Edit Remove Deactivate

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Add new codelist item

Name*

Description

Category

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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