SmartStart Self-Led Project Plan for Service Desk

Education and Design

☐ Success Criteria

These questions allow us to understand the goals and success criteria to ensure a smooth and successful implementation process.

- What resources do you have dedicated to this project?
- Do you have a current ticketing system?
    - If yes, does your ticketing system have a subscription end date?
- How will you receive tickets?
    - Email, chat, portal?
- What groups/departments/teams are going to be involved in using the application?
- What modules are you planning on using? Here is a list of the various modules:
    - Incidents Problems Changes Change Catalog Releases Service Catalog Solutions Asset Management Procurement
- Do you want to take a phased approach? What are your Go-Live criteria?
    - Here are some examples of different Go-Live approaches: Internal - External
        - Email Ticketing - Service Portal
        - Service Desk - Asset Management Departmental
        - Asset Management Phased Module Based

☐ Incident Routing and Workflow Education

☐ Incident Routing

Incident Routing is beneficial to your Service Desk because it allows automatic assignment of the incidents sent to SolarWinds® Service Desk. This automatic assignment saves you time and ensures your incidents are visible to the correct Service Agents.

SolarWinds Service Desk supports the automatic routing of incidents based on several conditions you can set up within the Setup menu of the application. You'll want to look through the various ways you can route an incident to the desired assignee within SolarWinds Service Desk as well as how this hierarchy of automatic routing will function.

The order of ticket assignment based on your settings will go in this order:

1. Automations
2. Subcategory Default Assignee
3. Category Default Assignee
4. Site Default Assignee
5. Department Default Assignee
6. Default Assignee for Account in Service Desk Settings
7. Not Assigned

☐ Incident Workflow

Email, portal, or chat? How will you have tickets flow into your Service Desk?

Have you ever wondered how incidents should flow through your service desk? You've probably asked yourself many different questions regarding how to run your service desk using SolarWinds Service Desk.

Where do my incidents go when they're submitted? How can my technicians be sure to not miss an incident? Is there a difference between a resolved or closed incident?

Video - Submitting a Service Desk Ticket:
https://video.solarwinds.com/watch/LzT7cEnQnX1MKGKxiFWULL

☐ Incident States

Out-of-the-box incident states include:

- New
- Pending Assignment
- Assigned
- Awaiting Input
- On Hold
- Resolved
- Closed

Custom States:
https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Custom%20States.htm

Incident Management 101: https://video.solarwinds.com/watch/sDZnKR1ZFYj7XxU5oB45oV

☐ Incidents vs. Service Requests

One of the most common questions we receive during implementation is, "What's the difference between an incident and a service request?" While most people are familiar with "tickets" or "incidents," they may not understand these terms when you throw them into the realm of the service catalog. If the service catalog has you exploring a strange new world in ITSM, we will clarify the difference between your traditional incident and service request.

☐ Incident

An incident as something is a break/fix issue that needs to be resolved. This might be something not working properly or broken. For example, this would include a broken printer, an application not loading properly, or a blue screen.

☐ Service Request

A service request is a request for a pre-approved service your organization can offer to its end users. You have the option to build service catalog items, which can include various information that can be collected from your end user as well as a "behind-the-scenes" process of tasks and approvals sent to certain groups within your organization. The service catalog can be used to build out request forms for employee onboarding and offboarding, various equipment, or an office move.

☐ API Documentation

SolarWinds Service Desk API

- Service URL https://api.samanage.com/
- For European based customers, please use: https://apieu.samanage.com

☐ What is the SolarWinds Service Desk API?

The SolarWinds Service Desk REST API allows customers and developers to expand and build on the SolarWinds Service Desk platform. SolarWinds Service Desk provides an API that can be used to retrieve and update service desk and asset inventory information from your SolarWinds Service Desk account.

☐ What does the SolarWinds Service Desk API do?

The SolarWinds Service Desk API allows anyone to create, retrieve, update, or delete various service desk or asset information. The API can be leveraged with many different modules in SolarWinds Service Desk including but not limited to computers, software, printers, risks, other assets, contracts, software licenses, incidents, and service catalog items.

The API makes it easy to integrate SolarWinds Service Desk with additional applications. If there's no native integration with SolarWinds Service Desk, you can use the SolarWinds Service Desk API to create an interface.

Authentication - The API authentication is token-based. Admins can generate a token from their own user profile on the user setup page. This token can then be provided to the API developer for them to gain access to items in SolarWinds via the API. Admins can also re-generate their tokens from the user setup page, which will invalidate all previously generated tokens.

☐ Please review the SolarWinds Service Desk API Documentation for detailed information - https://apidoc.samanage.com/

☐ SolarWinds THWACK Community

☐ Product Newsroom - Check out what gets released in real time.
https://thwack.solarwinds.com/product-forums/solarwinds-service-desk-swsd/b/news

☐ Training Videos - View our collection of training videos.
https://nurture.solarwinds.com/ttt-itsm/employee-portal-experience

☐ Explore the Product Roadmap - Interested in what we're working on? Check out what our product team is launching in the Service Desk next.
https://thwack.solarwinds.com/product-forums/solarwinds-service-desk-swsd/b/news/posts/what-we-re-working-on

☐ Ask the Community - Collaborate with the rest of our customers in this section.
https://thwack.solarwinds.com/product-forums/solarwinds-service-desk-swsd/f/forum

Account Basics

☐ Organization: Sites & Departments

Click Here for Organization in Service Desk - https://app.samanage.com/setup/organization

☐ Time Zone and Default Language

This is the default time zone and language that displays through the account unless a specific time zone or language is specified for a user.

☐ Sites and Departments

Sites and Departments are essential to your setup if you wish to be able to accurately report on where your tickets are coming from and where your assets live. You'll be assigning sites and departments to your assets, users, and tickets.

The key here is to be able to accurately report on how things are moving through your service desk—where tickets are coming from and where your assets are living.

☐ Sites

Most of the time, sites are going to refer to your physical locations. You'll enter each of your physical locations as a site.

In some cases, you might want your sites to be specific buildings on a campus or even your customer names. Just make sure it makes sense for your reporting measures.

☐ Departments

Departments will typically be the organizational structure that runs throughout your company. Some potential departments might be Human Resources, Sales, Information Technology, Marketing, etc.

- [ ] Organizational Setup Documentation

  https://documentation.solarwinds.com/en/Success_Center/swsd/Content/Guide%20to%20the%20Basics/Organization%20&%20Sites.htm

- [ ] Business Hours

Click Here for Business Hours in Service Desk - https://app.samanage.com/setup/business_hours

You'll define your business hours in SolarWinds Service Desk as the hours in which you offer support to your end users. You can scope your Service Level Management rules as well as your Reports around Business Hours.

- [ ] Business Hour Records

  You'll need to specify a business hour record for each site. If all your sites have the same support hours and are in the same time zone, you can just have one set of Default Business Hours. If your sites have different support hours or if the sites you support are in different time zones, you'll need to create different business hour records for your different scenarios. You'll need to assign your business hours to your sites in the Organization menu.

- [ ] Scheduled Time Off

  You can define additional days where business hours are not in effect. For example, holidays, company off-site days, and election days should be added. You can also import a pre-defined holiday calendar from the selection drop-down. Just make sure to de-select holidays that don't apply to your organization.

- [ ] Business Hours Setup Documentation

  https://documentation.solarwinds.com/en/Success_Center/swsd/Content/Guide%20to%20the%20Basics/Business%20Hours.htm

- [ ] User Import

Click Here for Users in Service Desk - https://app.samanage.com/users

- [ ] User Provisioning Options

  User Provisioning refers to how you'll upload your user attributes like Site, Department, Reports To, Job Title, etc., into SolarWinds Service Desk. This can be done through an IDaaS partner, our open REST API, a .csv upload, or through manual creation.

☐ IDaaS (AD Provisioning and Deprovisioning)

You can choose to partner with one of our IDaaS providers as a customer of SolarWinds Service Desk.

- Azure
  - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/azure%20sso%20config.htm
- OneLogin
  - https://onelogin.service-now.com/kb_view_customer.do?sysparm_article=KB0010381
- Idaptive
  - https://docs.idaptive.com/Content/Applications/AppsWeb/Samanage.htm
- OKTA
  - https://saml-doc.okta.com/Provisioning_Docs/SolarWinds-Service-Desk_Provisioning.html

☐ API Scripting

You can script in your user attribute information using our open REST API.

- SolarWinds Service Desk Built API Script
  - You can use an API script already included in your implementation package or you can purchase an API script from SolarWinds.
- User Created API Script
  - We have many different resources available to empower you to manage your own user scripting as well.
    - GitHub Ruby Script - https://github.com/SAManage/Samples/tree/master/Sync%20Users
    - SolarWinds API Documentation - https://apidoc.samanage.com/

☐ CSV Import

You also have the option to import your user attribute information via .csv import. Please see the template and template guide attached below for details.

- How to Import with CSV - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/users.htm

☐ Manual Creation

The last option would be to create your users manually by adding each new user individually. Please see the tutorial video linked below.

- How to Create Users Manually - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/users.htm

☐ Roles

Click Here for Roles in Service Desk - https://app.samanage.com/setup/roles

Each user in SolarWinds Service Desk is assigned to a role to identify their specific access within the application. There are four default roles created in each account: Administrator, Service Agent User, Service Task User, and Requester. These roles also double as license types.

In most cases, you'll be fine with the default roles, but you can add custom roles if needed. If you start to add custom roles or adjust the existing roles, you'll become familiar with permissions and restrictions. The permissions or restrictions assigned to each role allows the application to know what types of information the user can access. Let's go into more depth regarding permissions and restrictions.

☐ Administrator

This is the all-powerful administrator role. This role exhibits the highest level of access to the application. Any user assigned to this role will have access to submit tickets, work tickets, and use the setup menu. This is a licensed role and will count against the number of licenses you purchased.

☐ Service Agent User

This role is for technicians who will be using the system as service agent users. This user will be someone who has access to the system to work incidents or manage assets. They'll have access to everything except setup, benchmarks, and the ability to delete items in the application. This is a licensed role and will count against the number of licenses you purchased.

☐ Service Task User

This is an upgraded end-user role. A user in this role will have access to the Service Portal side of SolarWinds Service Desk only. However, they'll also be able to see the "My Tasks" menu on the Service Portal, which will enable them to manage tasks and approvals. Assigning users to this role will also enable them to manage tasks and approvals through email. This is not a licensed role.

☐ Requester

This is your basic end-user role. As an end user, this person will only have access to the Service Portal. They won't be able to access the application side of SolarWinds Service Desk or see the "My Tasks" menu on the Service Portal. This is not a licensed role.

☐ Permissions and Restrictions

Permissions and restrictions tell the application what type of information the user can see when logged in to SolarWinds Service Desk. Each role has a set of permissions and restrictions associated with it. These items differentiate each role from one another. The best way to design a role is by giving them permission to what they need to access. Once they have permissions, you can add restrictions to scope down the permissions they have been given.

You'll find several different articles below that will walk you through building these out. You might also find some great examples of building roles for departments other than IT, such as Facilities, Human Resources, or even your Marketing team!

- ☐ Roles and Permissions Guide - https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Roles.htm

☐ Categories and Subcategories

Click Here for Categories in Service Desk - https://app.samanage.com/setup/workflow

Categories and Subcategories are used to categorize the Incidents and Service Requests coming through your service desk. You can also categorize your Solutions in SolarWinds Service Desk using the same list of categories.

Incident categorization exists primarily to classify incidents to provide initial support. Initial support means proper analysis, evaluation, and if required, routing. Classification is neither to determine root cause nor technical causes of the incident.

When you allow your employees to specify a category for their break/fix incidents on the Service Portal, you can set auto-routing rules for these incidents to the correct group of technicians based on the employee's selection. Having a well-defined set of categories and subcategories will also empower you to create informative reports on the types of incidents and requests you take care of with your service desk.

- ☐ Categories

  Categories are the top-level selection used to gather an idea of what this incident pertains to. If our end users might be making this selection, we want to make sure our category selections can be understood by your employees.

- ☐ Subcategories

  Subcategories are the lower level of selection when categorizing an incident or a service request. This selection gives your employees and technicians the ability to provide another layer of granularity when describing their issue or the service request item.

- ☐ Default Assignee

  Don't forget to fill in your Default Assignees for both Categories and Subcategories. These selections will enable you to auto-route your incidents based on the category and subcategory your employee selects on the Service Portal. We typically recommend using Groups as your

default assignees for visibility and ease of use. If you want to learn more about incident routing, click here.

- [ ] Examples

Please review our Category and Subcategory example list below. We know this list won't align with every organization, but it will give you a great starting point for creating your selections.

- [ ] Category Documentation Page: https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/categories.htm

- [ ] Video Tutorial - Setting Up Categories: https://video.solarwinds.com/watch/JnLUUewcmEZkyit5s8fdQN

- [ ] Groups

Click Here for Groups in Service Desk - https://app.samanage.com/setup/groups

Groups are created to associate multiple users together. These can be groups of approvers, administrators, teams of technicians, or departments, to name a few. In most cases, groups can be selected wherever you would select a user. You can set a group of users as the default assignee or use our inline editing in the Incidents menu to quickly reassign an incident to a group of users.

- [ ] Group Assignments

We always recommend your default assignees are set to a Group. This allows for better visibility if an employee leaves the organization or goes on vacation. All users in the group will receive notifications if the group is assigned to an Incident or a Service Request workflow task.

Groups also come into play when you want to get multiple people involved as a part of workflow processes. You can assign Service Requests as well as workflow tasks within a Service Request to groups. You can also associate computers, other assets, and contracts to Groups.

Users can be added to a Group once they have been imported into SolarWinds Service Desk. You can select multiple users at once to add to a group.

- [ ] Groups Setup Tutorial: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Groups.htm

- [ ] Queues

Click Here for Queues in Service Desk - https://app.samanage.com/setup/assignable_queues

Queues are a repository of tickets waiting to be assigned. This allows the IT manager to review incoming tickets and prioritize assignment to ensure his/her team is working most effectively.

- [ ] Queue Use Cases

When you have a shared workload, tickets can be placed in a queue. The status is automatically set to Pending Assignment.

Anywhere ticket assignment is not predetermined and depends on availability, acceptance, etc. For example: Incidents queue, High Priority Changes queue, VIP queue, Network issues queue, Escalations queue, etc.

☐ Implementing Queues

https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Queues.htm

☐ Queue Setup Documentation:

https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Queue%20Management.htm

☐ Service Level Management

Click Here for Service Level Management in Service Desk - https://app.samanage.com/setup/slas

The Service Level Management feature in SolarWinds Service Desk is used to execute the support guidelines and agreements your company wishes to provide your employees. We use SLA rules to represent these standards within incident management. When creating your rules, please make sure each rule is truly a breach, as each incident can only breach once.

Let's talk through how to create an SLA rule. It's fairly simple!

☐ Name

This is the name of your SLA rule. Please consider your naming scheme, as this will be important when you continue to create rules.

☐ Target

The target is essentially what you're trying to accomplish for each incident. This could be how quickly you want the incident resolved, commented on, or assigned. You can also choose a target of no actions taken, which means you want an action taken on the incident within a certain amount of time.

Once you have chosen your target, you'll need to select a timeframe for your target. This can be done in hours or minutes.

☐ Scope

Once you've selected your target, you can refine this by defining a scope for each target. The scope will narrow down your target, so it only applies to the specific incidents that fall within that scope. This can be set by category, priority, site, department, or requester. You can select more than one scope per rule.

☐ Action

The action is what happens when the rule has been breached for a specific incident. Upon breach, you can change the priority, re-assign the incident, or notify a group or individual. You can also add specific tags for the incident.

Please keep in mind the system will automatically notify the incident assignee in addition to what you have selected here.

☐ Video on Creating Service Level Agreements (SLAs) - https://video.solarwinds.com/watch/xqJPDLX3A4oJZRRr1qJHJ1

Service Desk Configuration

☐ SSO

Click Here for Single Sign On in Service Desk - https://app.samanage.com/setup/sso

Single Sign On allows your users to sign in to SolarWinds Service Desk using their Active Directory credentials. Below you will see our recommended options for SSO; however, we support any SAML 2.0 SSO, so feel free to hook up with something else if you don't see it here.

☐ IDaaS

- Azure
  - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/azure%20sso%20config.htm
- OneLogin
  - https://www.onelogin.com/partners/technology-partners/samanage
- Idaptive
  - https://docs.idaptive.com/Content/Applications/AppsWeb/Samanage.htm
- OKTA
  - https://saml-doc.okta.com/SAML_Docs/How-to-Configure-SAML-2.0-for-SAManage.html
- Google Apps
  - https://documentation.solarwinds.com/en/success_center/swsd/content/guide%20to%20the%20basics/single%20sign-on.htm
- ADFS
  - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/adfs%20sso%20config.htm

☐ Email Settings

Click Here for Email Settings in Service Desk - https://app.samanage.com/setup/email

This is where you'll find all setting related to the different types of emails coming in and out of your SolarWinds Service Desk.

☐ Email Dropbox

Your email dropbox in SolarWinds Service Desk has already been set up. To receive incidents by email, send an email to the email listed in your account. You can also set up a forwarding rule on your email server to send all emails from your internal support address to the dropbox email in your account.

Your email dropbox will be located in your account within the parenthesis in the Email Settings help menu.

☐ Reply Email Address

It is best practice to enter a reply email address here in the email settings as well.

The reply email address will ensure everything looks like it's coming from the same email address your employees sent their message to. This will typically be your internal support address. (*Please note this functionality is not available for customers on the EU data center.)

☐ Blocked and Allowed Addresses

We allow you to adjust the setting for various email addresses and domains that can create tickets in your system. For very tight security around this manner, we recommend specifying allowed domains. If you're only concerned about a few email domains, you can leave the allowed list open and use the blocked domains.

☐ Whitelisting IP Addresses - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/whitelisting%20ip%20addresses.htm

☐ Domain Mapping

Click Here for Domain Mapping in Service Desk - https://app.samanage.com/setup/domain_mapping

Domain Mapping is used to change the URL your users access to log in to SolarWinds Service Desk. Instead of this being tied to your account name, you have the option to customize the URL.

☐ Requirements

There are a couple of things to note for this process; please see below:

- CNAME Record in DNS
  - You must create the proper CNAME record in your DNS before adding the domain into SolarWinds Service Desk.
- Creating a CNAME Record in DNS
  - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/domain%20mapping.htm
- SSL Certificate
  - It is strongly recommended that you purchase and upload an SSL certificate in conjunction with this functionality, as SolarWinds Service Desk no longer supports Non-SSL Domain Mapping. SSL Certificate upload can take up to 48 hours.
- Single Sign On
  - If you're currently using Single Sign On with SolarWinds Service Desk, the domain mapping adjustment may affect the routing of your login page. Please make sure to update your login redirect with your SSO provider.

- Wildcard SSL Certificates
    - You can use a wildcard certificate with SolarWinds Service Desk; however, this cannot be done natively within the SolarWinds Service Desk application. You'll need to send this information to our support team at ServiceDeskSupport@Solarwinds.com . This can take anywhere between 48-72 to process, so please plan accordingly. Please see the article below for requirements.

☐ Domain Mapping Documentation: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Domain%20Mapping.htm

☐ Service Portal

Click Here for Service Portal in Service Desk - https://app.samanage.com/setup/portal

The Service Portal setup menu allows you to customize the look, feel, messaging, and functionality of the Service Portal for your employees.

☐ Look and Feel

We allow you to customize the look and feel of your Service Portal by adding a logo and favicon, so your employees will know they're in the right place. You can specify the primary and secondary colors in the header space on the Service Portal. Please refer to our Service Portal Design Guide for tips on how to make your Service Portal look amazing.

☐ Messaging

You also have the option of customizing many different areas of messaging on the Service Portal as well. This includes the Title, Main Message, Sign Up Message, Announcement Message, Incident Field Setting, and the Menu Navigation Titles shown at the top of the Service Portal page.

☐ Functionality

Some of the other things in this section of setup have to do with the way your employees will be interacting with the Service Portal. You have many different options for customizing the functionality your employees are given. For example, you can hide or unhide selections like category, priority, and due date or give them the ability to mark their own requests as resolved. You also have the option of adding specific domains that can access your Service Portal.

☐ Service Portal Setup Tutorial: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Service%20Portal.htm

☐ Video: Employee Service Portal: https://video.solarwinds.com/watch/fqvH5HmtqV4GG73R7QqZRy

☐ Chat

Chat facilitates real-time communication between end users and agents who support the systems and resources they rely on. Chat allows for both parties to maintain active attention—helping agents resolve issues faster and more efficiently.

https://documentation.solarwinds.com/en/success_center/swsd/content/chat.htm

☐ What are the benefits of chat?

- Faster, more efficient way for end users to engage with service agents.
- Improves employee satisfaction by providing a direct communication channel for instant interactions with agents, helping them get the resources they need in a timely manner.
- Increases agent productivity by providing a chat queue that will allow them to efficiently engage with multiple end users at the same time.
- Improves first-touch-resolution and time-to-resolution metrics, which can reduce your cost per ticket.

☐ How to Implement Chat

- Chat is easy to implement and manage and promotes portal adoption.
- Chat is natively built into your service desk, with a back-end interface for agents and portal access for end users.
- Allows you to quickly implement chat into your service management processes.
- The full chat correspondence is captured by your service desk.
- Allows agents to convert chats into incidents without missing any details.

☐ Activating Chat

Before you activate chat, you may want to establish a process to help you better set and manage the goals and expectations of chat for both your agents and end users. Some good questions to ask are:

- What kind of traffic are we getting to our portal and how much of it do we feel will be converted to chat interactions?
- Are we getting enough portal traffic to justify opening chat? If not, do we want to use chat to encourage more portal activity?

Pro tip: To better understand how to properly staff your chat queue, leverage the Incident Trend and Incident Heatmap Reports. The Trend Report will show you the busiest days in the week, while the Heatmap Report will show you the busiest hours of the day. By understanding your historical statistics on when your service desk is its busiest, you can better forecast the times chat will be used the most and staff your team accordingly.

☐ Service Desk Settings

Click Here for Settings in Service Desk - https://app.samanage.com/setup/helpdesk

SolarWinds Service Desk allows for customization of the Service Desk to fit your company's processes. This menu will allow you to customize the way your technicians interact with the various features of the incident workflow.

☐ Service Desk Name

This function allows you to enter a Service Desk name for your company. This name is used in the “From” field in email notifications and in the service portal.

☐ Sign-In Image

This image will show on the native SolarWinds Service Desk sign-in page. If you’re redirecting to a Single Sign On (SSO) login page, this image will be irrelevant.

☐ Default Landing Page

This will be the default landing page for all agents. Every time an agent logs in to the application, this is the page they’ll land on. If you allow agents to customize this, they’ll find the override setting in their profile card.

☐ Custom Resolution Codes

Custom Resolution Codes are used to report on the different ways your team resolves an incident. You can customize these codes to match your business logic. You can add new custom resolution codes, delete existing ones, and make this field mandatory for your technicians.

☐ Auto Tagging

Tags are used in SolarWinds Service Desk to add search terms to your incidents. You can check this box if you want SolarWinds Service Desk to automatically generate tags.

☐ Incident Settings

☐ Close Inactive Resolved Incidents

This feature allows you to select a duration after which inactive incidents will be moved from a Resolved state to a Closed state. An incident is considered inactive when it has no new comments and no changes are made to the incident. We typically recommend anything from 5 - 14 days depending on your organization.

☐ Reopen Resolved/Closed Incidents

This feature allows you to reopen closed or resolved incidents when a new comment is made by the end user either via the portal or email. Keep in mind your technicians will still receive a comment notification if this is turned off and your comment notifications are turned on.

☐ Default Priority for New Incidents

This feature allows you to set the default priority for new incidents. You can adjust the default priority to Low, Medium, High, or Critical.

☐ Comment Settings

☐ Comments Visibility

Here you can set the visibility of comments added to incidents in your service desk. Once set, this will be the default setting for any new comments added in the incident view. Public comments will be visible to both the technicians and employees, while Private comments are only visible to technicians.

☐ Comments Sorting

Turn the toggle to “On” to display newest comments first in the incident view. To reverse the order, switch the toggle to “Off.”

☐ Customer Satisfaction Surveys

Customer Satisfaction surveys are a great way of knowing what your end users think of the level of service you’re providing. SolarWinds Service Desk allows you to send out Customer Satisfaction surveys for all incidents or just certain categories of incidents. You can also turn the surveys off completely, but we don't recommend that.

If you choose to send surveys, you can select when the survey will be sent, the frequency in which they are sent, and the threshold for the customer satisfaction widget on the dashboard.

☐ Custom States

In this section, you can rename system states, create your own new custom states, and adjust the order in which they appear in the drop-down menu. Today, we allow for the customization of the states in the Incident module as well as the Changes module.

☐ Custom Incident States

This setting allows you to rename or create custom states for the Incident module. You also have the option to change the order in which the custom states appear in the drop-down menu for incidents. Additionally, you can determine if the custom states are affected by the SLA rules by checking the “Apply SLA” box next to each state.

☐ Custom Change States

This setting allows you to rename or create custom states for the Changes module. You also have the option to change the order in which the custom states appear in the drop-down menu for changes. There is no option for SLAs here as the SLAs do not apply to the Changes module.

- [ ] Custom States Documentation: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Custom%20States.htm

- [ ] Automations

Click Here for Automations in Service Desk - https://app.samanage.com/automations

This feature provides a powerful, easy way to trigger actions based on different conditions of various triggers in SolarWinds Service Desk. We're going to cover the different components of creating an automation, so you can start exploring with your own automation rules.

- [ ] Trigger

  Selecting a trigger is the starting point of your automation rule. The trigger is what happens in SolarWinds Service Desk to spur an automation rule to run. This list will continue to grow as we expand on this feature, but currently, we can set triggers on objects being created or comments being added.

- [ ] Scope

  The scope narrows down what the trigger will apply to. Stay tuned for updates to this feature as we plan to add scoping options. For now, all automations are scoped around both Incidents and Service Requests.

- [ ] Conditions

  When these conditions are present, the actions selected below will be triggered. Conditions can be set to require all of them to be met or only some of them to be met to initiate the actions.

- [ ] Actions

  These are the actions that will be initiated when the conditions have been met. You can have as many actions as you'd like.

- [ ] Video Tutorial - Building Automation Rules: https://video.solarwinds.com/watch/kZrKpr7SSkegswSwTfUxpt

- [ ] Creating Custom Automations: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Automations.htm

- [ ] Service Catalog

Click Here for Service Catalog in Service Desk - https://app.samanage.com/catalog_items

The Service Catalog allows you to create a catalog of pre-approved services and requests your team offers to your organization. These service catalog items can be requested by your employees, or they can be requested or scheduled internally by your technicians.

☐ Examples

You have several options when it comes to using the SolarWinds Service Desk Service Catalog. Here are some examples of what we find our customers creating:

- Employee On-Boarding
- Employee Termination
- Equipment Request
- Scheduled Maintenance
- Software Access Request

☐ Details

You'll find these fields at the top of the Service Catalog item creation menu. This information is the static characteristics of this Service Catalog item that will not change when this item is requested. This includes things like title, description, category, and a picture.

☐ Variables

The variables section will become the form the end user will fill out to make the request. You can select from many different data types including but not limited to text, dropdown, date, attachments, and multi-pick lists. Collecting this information upfront allows your team to start delivering rather than wait for additional information. These variables can also be marked as mandatory, which will force the requester to provide this information when requesting.

☐ Process

The Process section is where you map out what happens in your organization once the Service Catalog item has been requested. By using a workflow of approvals and tasks, the service catalog process arranges your business practices into one streamlined procedure.

☐ Introduction to the Service Catalog:
https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Service%20Catalog_Admin.htm

☐ Video - Creating a Service Catalog Item:
https://video.solarwinds.com/watch/W3YSzW6mmdvvw2ncSVwEjb

☐ Video - Two Service Catalog Items HR Can Use:
https://video.solarwinds.com/watch/WmyCaooZYHRQ6WZERqZopn

☐ Solutions/Knowledge Base

Click Here for Solutions in Service Desk - https://app.samanage.com/solutions

The Solutions module in SolarWinds Service Desk allows you to build out a database of useful articles, knowledge base items, or FAQs. You can allow everyone in your organization to view these items or have them restricted for internal use only. Solutions are perfect for documenting resolution steps for commonly submitted incidents.

☐ Examples

- Email Password Reset Instructions
- How to Set Up Voicemail on Phone
- How to Install Software

☐ Details

☐ Creation

There are several different ways to create a Solution in SolarWinds Service Desk. We typically recommend creating them one by one as it allows you to format them easily and efficiently.

- New Solutions Created Manually
- Directly from a Resolved Incident
- CSV Import

☐ State

When creating solutions, you can mark them as an Internal, Draft, or Approved state.

- Draft - Draft Items Only Visible to Technicians
- Internal - Approved Items Only Visible to Technicians
- Approved - Approved Items Visible to Technicians and Employees

☐ Use Cases

Let's talk about some of the different ways you can use the solutions you've created in SolarWinds Service Desk.

☐ Technicians

Solutions can be used as responses within an incident by adding them as comments that go out to employees. You can also add solutions internally, so your technicians can use them to solve problems efficiently.

☐ Service Portal

Your employees can also access these Solutions from the Service Portal Solutions menu. This allows them to self-service and access quick and seamless assistance.

☐ Smart Suggestions

Our system will automatically suggest solutions for both technicians and employees. This allows us to help you provide the right resources to your organization in real time.

☐ Custom Forms and Fields

Click Here for Custom Forms and Fields in Service Desk –

https://app.samanage.com/setup/custom_forms

https://app.samanage.com/setup/custom_fields

This customization allows you to add additional fields in various modules of SolarWinds Service Desk. While the initial implementation may warrant an influx of these items, the creation of custom fields and forms will follow you throughout your use of the application.

☐ Custom Forms

Custom forms refer to the different modules you can add custom fields into. These forms will serve as the identifier for the location your custom field will appear in. You can create one form for each module available to you.

https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Custom%20Forms.htm

☐ Custom Fields

Custom fields will populate throughout the application. You can create many different types of fields such as text, dropdown, checkbox, date and time, and user selections.

Custom fields can be useful for capturing additional information on specific types of incidents or on the asset management level. When custom fields are being used, they'll show as filtering options both in the Incidents menu and the Reports menu.

https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Custom%20Fields.htm

☐ Notifications

Click Here for Notifications in Service Desk - https://app.samanage.com/email_templates

This area allows you to configure the notifications sent to your technicians (assignees) and employees (requesters and/or CCs) based on your preferences.

☐ Email Notifications

You can customize the different notifications sent out to both your assignees and requesters based on the different selections you see in this section. If the requester option has been selected, you can also have notifications sent to the CC'ed contacts on the incident. These settings are global for each user type.

Typically, we that you turn on the notifications for Incident Received, Incident Resolved, and Incident Commented for both the assignee and the requester. You'll also want to turn the Incident Assigned notification on for assignees, so the new assignee will be notified if the assignee changes. Don't forget the assignee notification for New Task.

☐ Default Timeout Period

You have the option to define the default timeout period for links to approvals or exported data sent via email. Here you can enter the amount of time in days for which you would like the timeout period to be. We regularly recommend 14 days for this setting.

☐ Expire RSS Feeds

This selection will expire any RSS feeds been exported from SolarWinds Service Desk. The RSS feed will no longer update.

☐ Weekly Summary

SolarWinds Service Desk will send a weekly summary of your account's performance if you'd like. Here you can select which users will receive the report.

☐ Notifications Setup Tutorial:
https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Notifications.htm

☐ Problem Management

The SolarWinds Service Desk Problem Management module allows you to manage the lifecycle of your company's problems. Problems are defined as the cause of one or more incidents. A problem could be an incident happening many times or an incident affecting many people in your company.

What is the objective of problem management?

The goal of problem management is to minimize the number and the severity of incidents (symptoms) and possible problems to your company. Using problem management allows your organization to proactively avoid future problems and incidents by identifying solutions to current problems.

☐ Benefits

- Enhances productivity of IT staff members
- Provides more consistent service delivery levels
- Ensures an increased ability to satisfy the technology needs of end users Improves ability to adhere to service performance requirements

☐ Problem Examples

- Occurrence of the same incident many times
- Incidents impacting many users
- Network diagnostics revealing systems not operating in the expected way
- Use Case Example - Joe and Tyler are support engineers for Company A. Their desks are side by side. One day, Joe leans back and tells Tyler "ugh, another Outlook issue." Joe swivels in his chair, "You working on one, too? I just had two incidents come in." Turns out, Joe and Tyler have been trying to solve the same problem. Instead of getting frustrated over lost time, their manager, Jessica, creates a problem in SolarWinds

Service Desk, attaches all the incidents to that problem, and thus cuts out the repetitive work.

☐ Problem Record Creation

There are two ways to create a Problem in SolarWinds Service Desk.

- Manually - New problem record is created as it relates to proactive concerns
- From an Incident - Create directly from an incident as a technician realizes many related issues. You can and should attach incidents and changes to the problem, so you can see the hierarchy and relationships.

☐ Problem Components

☐ State - When creating Problem records, you can mark them as Open, Pending Change, Known Issues, On Hold, or Closed state. The state is a signifier of what status the problem is in.

- Open - This is the initial state of created problem record.
- Pending Change - This is a problem awaiting a change process.
- Known Issue - This is a problem record with a documented root cause and workaround.
- On Hold - This is a problem that has been put on hold (can be on hold for various reasons, such as no current workaround or solution).
- Closed - This is a problem record that has been "resolved". If a problem doesn't have a resolution, the problem would stay in the "Known Issue" state with a valid workaround documented.

☐ Root Cause - Root cause(s) and root cause analysis are focused on identifying and documenting the origins and underlying causes of problems, asking and answering the question, "What caused things to break?" Root causes are documented in problem records. The process is deceptively simple: if you remove a symptom and the problem doesn't happen, it's not part of the root cause. Examples:

- Software has a bug
- Equipment has corrupted memory

☐ Symptom - A symptom is a departure from normal functioning (can be an incident). Symptoms are documented in problem records. Examples:

- Application error or malfunction
- Loss of network service

☐ Workaround - Workarounds are temporary fixes that go with your problem management process if a permanent solution is not yet achievable. Workarounds are documented in problem records, so technicians can refer to this information. Examples:

- Restarting services in an application
- Failover to secondary equipment.

☐ Problem Management Documentation: https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/problems.htm

☐ Video: Problem Management 101: https://video.solarwinds.com/watch/bqramLZVEX7k79bw3NKrUi

☐ Change Management

The SolarWinds Service Desk Change Management module allows you to manage the process responsible for controlling the lifecycle of all changes. A change is defined as the addition, modification, or removal of anything that could have an effect on IT or end-user services. The objective of change management is to enable beneficial changes to be made with minimum disruption to IT services.

What is the objective of change management?

As an IT service management discipline, change management ensures the procedures and methods employed to enact change are standardized and promote the prompt and efficient management of any changes to IT infrastructure. The goal of Change Management is to establish standard procedures for managing change requests in an agile and efficient manner to drastically minimize the risk and impact a change can have on business operations.

☐ Benefits

- Decreased adverse impact on business operations and improved visibility into IT change
- Prioritized responsiveness to change and faster change implementation
- Adherence to government and other compliance regulations Improved risk management and increased staff productivity Reduced service disruptions and system downtime

☐ Change Types

- Standard
- Normal
- Emergency
- Ad hoc

☐ Change Examples

- Changes stemming from business initiatives with either an internal or external focus (or both).
- Application, hardware, software, network, documentation changes
- Migration from one data center to another
- OS upgrade
- Patch deployment

☐ Change Record Creation

There are several ways to create a change record in SolarWinds Service Desk.

- Manually - New change record is created as it relates to proactive concerns.
- From an Incident, Problem, or Release record - Create directly from an in an incident, problem, or release record. You can and should attach problems, releases, and configuration items to the change record. This will enable you to see the hierarchy and relationships.

☐ Change Components

☐ State - When creating change records, you can mark them as Open, On Hold, Waiting for Approval, Approved, Declined, Closed Completed, and Closed Incomplete. The state is a signifier of what status the change is in.

- Open - This is the initial state of the created change record.
- On Hold - This is a change that has been put on hold.
- Waiting for Approval - This is a change awaiting approval. Approved - This is an approved change.
- Declined - This is a rejected change.
- Closed Complete - This is a change record implemented and/or resolved to full completion.
- Closed Incomplete - This is a change record closed without being fully implemented or resolved.

☐ Change Plan - A change plan formally documents the process/procedures for the intended change and allows your organization to detect and record the change. Example:

RP Hotfix 4.2.11 B10 needs to be installed in prod environment.

Change Plan

1. Devise communication plan.
2. Devise action and test plan.
3. Full back up.
4. Stop ERP.
5. Apply Hotfix.
6. Start ERP.
7. Test as per Test Plan.

☐ Rollback Plan - The rollback plan formally documents the process/procedures to be followed if the change doesn't go as expected. Example:

- Restore from backup.

☐ Test Plan - The test plan conveys how the team will test the changes before they go live. Example:

Test Plan

1. Review Test Plan.
2. Check version in About screen.
3. Perform test transactions.

☐ Changes: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Changes.htm

☐ Change Catalog: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Change_Catalog.htm

☐ Change Management: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Change%20Management.htm

☐ Video: Change Management 101: https://video.solarwinds.com/watch/GxpmuQ6Vno2biVqJTMV8AU

☐ Video: Creating Change Templates: https://video.solarwinds.com/watch/MPCugvAzFXaW1GhsCN5o1d

☐ Release Management

The SolarWinds Service Desk Release Management module allows you to manage the processes/procedures responsible for building and testing a release and all the activities supporting the release effort. Releases are defined as new pieces of functionality that could be delivered systematically as a series of changes. Release Management interfaces with other ITIL service management processes across the service lifecycle, including Problem, Change, and Configuration Management.

What is the objective of Release Management?

In ITIL, release management is a key process in Service Transition, and this process should be thought of as a coordination and collaboration process. The goal is to roll out updates in production, managing the risks involved and responding quickly to potential incidents. It's critical to have a formalized ITIL release process to ensure deployments are released on schedule.

Release management doesn't replace the specialized functional processes, but coordinates activities between them in a service-oriented fashion with change management leading the effort.

☐ Benefits

- Documenting successes and sometimes failures enable you to understand opportunities for improvement and ensure smoother and more strategic deployments in the future.
- Comprehensive audit logs help you visualize any updates and approvals made during the release process.
- Streamline deployments to reduce the need for multiple disruptions and outages.

☐ Examples

- New or updated hardware New or updated software
- New or updated documentation or processes

☐ Release Record Creation

There are two ways to create a release record in SolarWinds Service Desk.

- Manually - New release record is created as it relates to proactive concerns.
- From a Change record - Create directly from a change record. You can and should attach related changes and configuration items to the release record.

☐ Release Components

☐ State - When creating release records, you can mark them as Open, On Hold, Waiting for Approval, Approved, Declined, Closed Completed, and Closed Incomplete. The state is a signifier of what status the release is in.

- Open - This is the initial state of the created release record.
- On Hold - This is a release that has been put on hold.
- Waiting for Approval - This is a release awaiting approval.
- Approved - This is an approved release.
- Declined - This is a rejected release.
- Closed Complete - This is a release record implemented and/or resolved to full completion.
- Closed Incomplete - This is a release record closed without being fully implemented or resolved.

☐ Plan - This release plan formally documents the plan/outline for the intended release. Example:

Upgrade ERP to v5 Release Plan

1. Devise Project Plan and Costing.
2. Assign resources.
3. Develop Upgrade Plan.

☐ Build - This build plan formally documents the process/procedures to be followed for the intended build/migration/process of the release. Example:

Build Plan

1. Restore prod instance in non-prod.
2. Run upgrade
3. Take timings
4. Finalize upgrade procedure.

☐ Deploy - Release/Deploy/Go-Live Details. Example:

Deploy Plan

Execute as per Upgrade procedure.

☐ Releases Documentation: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CompleteGuideToSWSD/Releases.htm

☐ Reporting and Analytics

Click Here for Reports in Service Desk – https://app.samanage.com/reports

You have your service desk and all the data that comes with it. How can you consolidate this data to identify what's working and what's not? Our reporting capabilities allow you to quickly identify areas for continued improvement.

☐ Reports

In our classic Reports section, you can report on SLA breaches, CSAT scores, ITIL processes, and overall resolution times to pinpoint areas to improve how you serve the organization moving forward.

- Video Tutorial: Creating Reports - https://video.solarwinds.com/watch/oTrHS3WNWMQmn7iR57u2eg
- Sharing Reports - https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/reports.htm

☐ Audit

In the Audit Report, you can quickly see security updates, changes made by an individual user, or hardware or software changes. The audit trail will show you which user made the change, the source, action, date the change was made, and a message associated with the change was made, and a message associated with the change.

- Audit Tutorial - https://help.samanage.com/s/article/Audit-Trail-Tutorial-1536721462402

☐ Custom

The Custom Report section allows you to see some of the additional information we can pull from SolarWinds Service Desk. You can export any of these reports and have them sent to your email to download.

☐ Benchmarking

Automatically captured from your SolarWinds Service Desk Service Desk, Benchmarking compares the performance of your service organization against industry benchmarks in real time. This report will be helpful 60 - 90 days after implementation to determine your operational success and how it compares with similar companies in your industry.

☐ Reports and Analytics Documentation: https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/reports.htm

☐ Procurement

Click Here for Procurement in Service Desk - https://app.samanage.com/contracts

With a robust procurement module in SolarWinds Service Desk, you can organize all your Contracts and Purchase Orders. This allows you to keep track of all your licensing, maintenance, and subscription obligations in a single location.

☐ Contracts

You can build contracts in SolarWinds Service Desk to quickly reference contractual terms and limits. When you align contracts in the procurement module to relevant assets and software licensing they support, you can demonstrate full compliance. You can create the following types of contracts in the SolarWinds Service Desk:

- Software license
- Maintenance
- Lease
- Subscription

☐ Importing Contract Information - You have the option to import your item and purchase information for each contract. Contacts need to be created **before importing** this information.

☐ Purchase Orders

You can build customized order forms to initiate the purchases your organization and employees need. Using approval processes to get the required sign-offs on POs before purchases are made will help make sure everything is running smoothly.

☐ Vendors

With so many technology vendors, it's critical to keep a comprehensive database of all vendors, giving you the ability to quickly contact your hardware, software, and service suppliers when you need them. This vendor list will follow you to the Purchase Order section.

☐ Reconcile

The Reconcile report provides you with an opportunity to create Software License contracts from tags being used on your software titles. SolarWinds Service Desk uses tags on software titles to aggregate them across versions.

Assets

☐ Deployment of Asset Agent/Scanner

Click Here for Deployment in Service Desk - https://app.samanage.com/setup/samanage_deployment

Asset information can be collected and imported into SolarWinds Service Desk with the Discovery Agent, Discovery Scanner, or Discovery for Chrome OS platform.

☐ Discovery Agent

This is an application installed on Windows and Mac computers and gathers hardware and software information. The information is sent back to SolarWinds Service Desk to track and manage these assets. The Discovery Agent must be installed on each computer you'd like to track. There are several ways to deploy the agent to your computers. Whether you're deploying individually or to your entire organization at one time, you'll find the agent by going to the Deployment setup menu or by clicking the link at the top of this card.

☐ Discovery Agent Guide:
https://documentation.solarwinds.com/en/success_center/swsd/content/discoveryinstalationguide/discovery-agent- installation.htm

- Group Policy - This is our best practice for deploying the agent to your organization. This option eliminates the need for your users to have administrator privileges and makes this a streamlined process by using your Active Directory. Please see the PDF attachment below for detailed instructions.
- Domain Login - This is recommended for Windows deployment to deploy on all computers that log in to the domain. Your local user accounts must have local administrator rights on their computers to use the domain logon script procedure. You'll find instructions for this in the setup menu.
- Email - This manual activation procedure is based on sending an email asking your users to manually install the agent. You can find the agent and email template for this in the setup menu.
- JAMF - You can install our agent with the Jamf application. Please see the following article for instructions:

https://documentation.solarwinds.com/en/success_center/swsd/content/discoveryguide/review%20of%20your%20discovery%20instance.htm#Jamf

- Individual Deployment - You have the option of downloading the agent and deploying it individually to each computer. Make sure to select the correct operating system before downloading the agent. Once you have downloaded the agent, you can launch the installer. You'll see more specific instructions in the setup menu.
- Discovery Agent Guide: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/DiscoveryInstalationGuide/Discovery-Agent- Installation.htm

☐ Discovery Scanner

This is an application installed on one or more segments of the network and uses agentless technology to pull information on all devices connected to your network by scanning IP addresses.

- Discovery Scanner Guide: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/DiscoveryInstalationGuide/Discovery-Scanner- Installation.htm

☐ Discovery for Chrome OS

You can import and synchronize Chrome OS information from the Google Admin Console.

- Google Chrome Book Tracking - https://documentation.solarwinds.com/en/success_center/swsd/content/discoveryguide/syncing%20chrome%20os%20devices.htm

☐ Asset Settings

Click Here for Asset Settings in Service Desk - https://app.samanage.com/setup/assets

The Assets setup menu allows you to define several different settings that pertain to the various Assets in your Inventory module. Let's talk about what these are used for.

Assets Documentation: https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/assets.htm

☐ Backup

You can back up all the data in your account by requesting a backup. After requesting a backup, your request will be added to a processing queue. Requests will be processed in the order in which they are received. You'll be notified by email when your backup is ready. You can request a backup immediately or schedule a weekly backup of your account's data.

☐ Differentiate Other Assets by Serial Number

This gives you the option to differentiate assets stored in the Other Assets section by the Serial Number. If this is not selected, you may have duplicate items showing in your Other Assets menu.

☐ Auto Generate Asset ID for Other Assets

We can automatically generate sequential Asset IDs for your Other Asset items. Enabling this option will generate a unique Asset ID for any new item and any existing items that do not already have an Asset ID.

☐ Render Barcodes for Computers

By default, SolarWinds Service Desk will generate a QR code for each asset. However, you can enable this option to generate both QR codes and barcodes for all assets. We recommend using QR codes as a best practice.

☐ Computer Assignment Rules

This functionality enables you to assign your Computers to a Site and Department based on different information collected by the agent. Here are some of the criteria you can choose from:

- Domain
- IP address
- External IP address Network cards
- IPs
- Name prefix
- Active Directory
- Organizational unit path (Chrome OS)

☐ Other Assets

Click Here for Other Assets in Service Desk - https://app.samanage.com/other_assets

The Other Assets section is used for managing assets not running on an operating system. The SolarWinds Service Desk agent can't be deployed to these items, so we give you a great option for storing all other assets here.

☐ Importing Other Assets

These items will be imported manually into the system. We can create each asset manually or we can upload a list of assets through a .csv import.

☐ Manual Creation

You can create the assets manually by going into the Other Assets section in the Inventory module and selecting the + button. All you need to do is enter the requested information and create the asset.

☐ CSV Import

The most streamlined way to import your assets into this section is by using the .csv import option. You can enter your asset information into the template attached below and import it directly into the Other Assets section. Please review our template guide below before proceeding.

☐ Examples

Here are some examples of what some of our other customers have stored in the Other Assets section.

- Routers
- Web cameras
- Monitors
- Desks
- Chairs
- Peripherals

☐ Risks

Click Here for Risk Settings in Service Desk - https://app.samanage.com/setup/risks

Click Here for Risks in Service Desk - https://app.samanage.com/risks

The Risks module allows you to see various alerts that will notify you of potential issues or hazards occurring in the application. These risks can come from both the Service Desk and Asset Management modules.

☐ Examples

Here are some examples of the potential risks you could see in this section.

- Low hard drive disk space
- Greynet software installed
- No antivirus detected
- Computers not reporting
- Expiring contracts
- Past due incidents

☐ Customization

There are various customizations you can create to determine what information populates in your Risks module.

☐ Low hard drive disk space

The application will notify you of the different computers with a "low" level of disk drive space. However, you can set the threshold for this notification in the Risks setup menu. Any computer reporting a level of disk space lower than the threshold will report as a risk in the application. You can also choose to monitor only boot drives (C:), instructing

the system to ignore any other disks running low on free space (CD-ROM and floppy drives are ignored).

☐ Greynet software installed

In SolarWinds Service Desk, Greynet software is any unauthorized software installed on your organization's computers. The Risks section will notify you of any Greynet software installed on your computers. You can add software titles to this list in the Risks setup menu. If you would like to see a list of your current Greynet software, please contact our support team.t ServiceDeskSupport@Solarwinds.com

☐ Remote Support

Click Here for Remote Support in Service Desk - https://app.samanage.com/remote_assists or https://app.samanage.com/setup/applications

SolarWinds Service Desk integrates with different remote support vendors to provide a convenient way to log in to your organization's computers without having to leave the application.

☐ Current Integrations

These are the vendors we currently integrate with. We're working with additional vendors to expand our offering. Please note these integrations require paid licensing with the respective vendor.

- Dameware®
  - Dameware Instructions - https://documentation.solarwinds.com/en/success_center/dre/content/sessions-service-desk-integration.htm
- TeamViewer
- LogMeIn
- Rescue
- GoToAssist

☐ Integrations Documentation: https://documentation.solarwinds.com/en/success_center/swsd/content/completeguidetoswsd/integrations.htm

☐ Configuration Management Database (CMDB)

A CMDB (Configuration Management Database) contains up-to-date information about all components of information technology systems used by an organization as well as the relationships between these components. This database is organized in a way that clearly defines the relationships and dependencies among the components stored. Each component is defined as a Configuration Item (CI) and often associated with other CIs to show how they work together to help deliver IT services.

☐ The Service Desk CMDB

The SolarWinds CMDB data model has a parent/child hierarchy and provides out-of-the-box CIs while allowing you to create additional custom CIs to ensure your data model most accurately reflects your physical and virtual IT infrastructure. Defining your CIs is step one. We then offer an extensive CMDB Data Model to assist you when defining the relationships and dependencies among your CIs.

The CMDB data model is built so each CI type inherits the layout and fields of its parent CI. This allows for time-efficient customization of the data model to meet each organization's business needs.

- Example - When you add a custom field to the System CI type layout, it will appear on all its child layouts as well, such as computer, network device, router, etc.

☐ CMDB Documentation: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/CMBD/CMDB_Agent.htm

☐ Video - CMDB: https://video.solarwinds.com/watch/dTQrcPR8wmeTc6Qe3dSS9A

Testing & Go Live

☐ Testing

It's very important to test before you Go Live. Here's a list of items we encourage testing before you flip the switch.

☐ Roles and Visibility

Can your technicians see what's pertinent to them? Please log in to each role to make sure these settings are set up correctly for your technicians and end users.

☐ Email Settings

Are emails correctly forwarding into your SolarWinds Service Desk incident queue? Please send an email into your system to ensure there are no security protocols preventing this from working correctly.

☐ Email Notifications

Can your organization receive emails from the SolarWinds Service Desk system? Please create a test incident with notifications turned on to ensure there are no security protocols preventing this from working correctly.

☐ Auto Assignments

Are your incidents routing to the appropriate users or groups? Please create a few test incidents with different criteria to ensure these are routing to the correct category and assignee.

☐ Service Portal

Can your users easily access the service portal? Is the SSO working appropriately? Is everything displaying as designed? Please make sure to test with several technicians and end users to make sure the sign-in and displays are functioning properly.

☐ Service Catalog Items

Are your Service Catalog items displaying properly on the Service Portal? Are the tasks and approvals routing to the correct people? Are the tasks and approvals working as designed or as you expected? Please request each of your category items once before go live to ensure these are working and routing to your satisfaction.

☐ Service Agent User Training

We believe it's extremely important for each of your technicians using the SolarWinds Service Desk to understand how and why to use each component of the application.

☐ Training Syllabus

Below you will find the information typically covered during a Service Agent User training session. This training typically lasts anywhere from 1 hour to 1 hour and 30 minutes.

- Service Desk (45 minutes)
  - Service Portal (How Requesters Use)
    - Overview of Home Page and All Menus
    - Run through of how tickets and service requests are submitted
    - Artificial intelligence (AI) and machine learning
  - Dashboard (How to Customize)
    - Widgets
    - Personalization
  - Service Desk > Incidents
    - Incident workflow (preview, triage)
    - Customize column view
    - Filtering (saving and customizing filtered reports)
  - Incident View
    - Title, attributes, reassigning
    - Commenting (private vs. public, solutions)
    - Actions (merge, clone)
    - Relationships (spawning incidents, problems, changes)
    - Problem and change management
    - Attaching CIs to incidents
    - Time tracking
- Asset Management (15 minutes)
  - Overview of Inventory Module
    - Computers
      - Overview of all information (software, lifecycle, audit, etc.)
  - Other Assets

        - How to import
        - Filtering reports
    - Overview of CMDB
        - Creation of items
        - Relationships
- Reporting (15 minutes)
    - Overview of Reporting
        - Dates
        - Grouping
        - Additional features
- Customized Report Request from Customer

☐ Requester Training

We also believe it's vital for your end users to have resources for understanding how to interact with the Service Portal. If the Service Portal is a new functionality for your organization, this will be very important for Service Portal adoption and success.

☐ Training Syllabus

Below you'll find the information typically covered during an end user training video.

- Overview (15 minutes)
    - Home
        - Search Bar
            - Overview of artificial intelligence (AI) and machine learning
        - Popular services and useful articles
        - My requests
    - Solutions
        - Explanation of knowledge base
        - How to access FAQs, knowledge base, solutions
    - Service Catalog
        - Explanation of service request
        - How to submit a request
    - New Incident
        - Explanation of break/fix incident
        - Entering data related to incident
            - Title
            - Description
        - Selecting data for fields
            - Category/subcategory
            - Site/department
            - Custom fields
    - My Requests
        - Importance of checking incident/request status
    - My Tasks

- Tasks
- Approvals

☐ Go Live Procedures

Ready to go live with SolarWinds Service Desk? Congratulations! We're so happy you're part of the SolarWinds family. We're here to remind you of a few items to consider before you flip the switch.

☐ Technician Training

Ensure Service Agent Users or internal technicians have been trained to use the SolarWinds Service Desk application to manage tickets and inventory. Please reach out to your Onboarding Specialist if you need assistance with this.

☐ End User Communication

Inform your Requesters or end users that you will be switching to SolarWinds Service Desk. Please update your users regarding any changes to their daily workflow.

You can find email templates to send to your organization here: https://documentation.solarwinds.com/en/Success_Center/swsd/Content/Guide%20to%20Go%20Live/Go%20Live%20Email%20Templates.htm

☐ Forward Existing Email

Forward new or existing support email address to the email drop box associated with your SolarWinds Service Desk account.

☐ Reroute Portal Domain

Update and redirect any URLs for the Service Portal. This includes making sure the CNAME, DNS, and routing is correct for your new Service Portal URL.