

# TABLE OF CONTENTS

---

<b>Chapter 1 - Introduction to SDS HelpDesk-----</b>	<b>1</b>
• Welcome-----	3
• How SDS HelpDesk Helps Your Customers-----	3
• How SDS HelpDesk Helps You-----	4
• Features and Benefits at a Glance-----	5
• What you Need to Know Before Getting Started-----	9
• Documentation Standards-----	10
• About this User Guide-----	10
• Getting Help-----	13
<b>Chapter 2 - Installation-----</b>	<b>15</b>
• System Requirements-----	17
• Installation Instructions-----	17
• Starting SDS HelpDesk-----	18
• License Agreement and Code-----	19
• Updating your SDS HelpDesk License Code-----	21
• User Login-----	22
<b>Chapter 3 – Getting to Know SDS HelpDesk-----</b>	<b>25</b>
• Overview-----	27
• Start Wizard-----	27
• Setup Wizard-----	29
• Work Flow Wizard-----	31
• Getting to Know the SDS HelpDesk Window-----	33
• <i>The Main Menu</i> -----	33
• <i>The Toolbar</i> -----	34
• Selecting Items from a Drop-down Tree-----	35
• Selecting Items from a Lookup Table-----	35
• Mandatory Fields-----	35

<b>Chapter 4 - Implementation Checklist-----</b>	<b>37</b>
• Overview-----	39
• Recommended Implementation Stages-----	40
• Implementation Checklists-----	41
<b>Chapter 5 - Setting Up SDS HelpDesk-----</b>	<b>45</b>
• Overview-----	47
• Selecting the Database-----	47
• Enter the Organization Name into the System-----	48
• Set or Reset Report Files Locations-----	48
• Set or Reset Help File Location-----	49
• User List, Permissions, and Initial Passwords-----	50
• <i>Add a New User</i> -----	51
• <i>Set Initial User Name</i> -----	52
• <i>Modify User Information</i> -----	52
• <i>Delete a User</i> -----	52
• <i>Add Initial User Passwords</i> -----	53
• <i>Set User Permissions</i> -----	53
• <i>Find a User</i> -----	53
• <i>Print or Preview a SnapShot Report</i> -----	53
• View Concurrently Logged on Users-----	54
• Format Service Contract Codes-----	55
• <i>Set Contract Code Options</i> -----	55
• <i>Format Fixed Text</i> -----	57
• <i>Format Date/Time</i> -----	58
• <i>Format Counter Settings</i> -----	58
• <i>Format Other Fields</i> -----	59
• <i>Set Code Order</i> -----	59
• <i>Test Sample Contract Code</i> -----	59
• <i>Contract Get Button</i> -----	59
• Format Issue Codes-----	60
• <i>Set Issue Code Options</i> -----	60
• <i>Format Fixed Text</i> -----	62
• <i>Format Date/Time</i> -----	62
• <i>Format Counter Settings</i> -----	63
• <i>Format Other Fields</i> -----	63
• <i>Set Code Order</i> -----	64
• <i>Test Sample Issue Code</i> -----	64

• Issue Get Button-----	64
• Define and Customize Labels-----	65
• Change User Password-----	66
• Customize Workstation Fonts-----	67
• Prompt Before Adding New Records to the Database-----	68
<b>Chapter 6 - Lookup Tables-----</b>	<b>69</b>
• Overview-----	71
• Add a List Box Lookup Table Entry-----	75
• Add a Tree View Lookup Table Entry-----	75
• Modify a Lookup Table Entry-----	76
• Delete a Lookup Table Entry-----	77
• Print SnapShot Report-----	77
• Merge Duplicates-----	77
<b>Chapter 7 - Address Book Manager-----</b>	<b>79</b>
• Overview-----	81
• Add a New Contact-----	82
• Modify Contact Information-----	84
• Delete a Contact-----	84
• Use Existing Contact Information as a Template-----	85
• Assign Skills to a Contact-----	85
• Use the Search Engine to Find a Contact or Groups of Contacts-----	86
• Search on Name-----	87
• Search by Telephone Number-----	88
• Search by Address-----	89
• Search by Organization-----	91
• Search on Contact Type-----	92
• Search on Title-----	93
• Search on Identifier-----	93
• Search on Skill-----	93
• Print SnapShot Report-----	95
• View Contracts from Address Book-----	95
• View Issues from Address Book-----	96
<b>Chapter 8 - Service Contract Manager-----</b>	<b>97</b>

- Overview-----99
- Add a New Service Contract----- 100
- Modify a Service Contract----- 101
- Cancel a Service Contract----- 102
- Delete a Service Contract----- 102
- Add or Modify Per-Incident Blocks----- 103
- Add, View, or Delete Attachments----- 104
- Use the Search Engine to Find a Service Contract----- 105
  - *Search by Contract Number*----- 105
  - *Search by Organization*----- 105
  - *Search by Contract Level*----- 106
  - *Search by Contract Duration*----- 107
- Print SnapShot Report----- 108
  
- Chapter 9 - Issue Manager-----109**
- Overview----- 111
- Add a New Issue----- 113
- Modify an Issue and Enable Record Locking----- 116
- Delete an Issue----- 118
- Add an Issue to the Knowledge Base----- 118
- Use the Issue Manager Search Screen----- 119
- Add or Delete Issue Conditions and Values----- 120
- Verify or View Service Contract Information----- 122
- Add, View, or Delete Attachments----- 123
- View and Add to Issue History----- 125
- Issue Work Groups----- 126
- Communicating with Work Group Members----- 129
  - *Send the Issue and the Attached Message at the Same Time*----- 129
  - *View the Work Group Notes Log and Add a New Message To It*----- 130
- View Issues and Messages Sent to you by Work Group Members----- 132
- Use the Search Engine to Find an Issue----- 133
  - *Search by Issue Number*----- 133
  - *Search by Organization*----- 133
  - *Search by Category*----- 135
  - *Search by Location*----- 136
  - *Search by Condition*----- 137
  - *Search by User*----- 138

• Search by Status-----	139
• Search by Priority-----	140
• Start Issue Timer-----	141
• Print SnapShot Report-----	141
<b>Chapter 10 – My Issues-----</b>	<b>143</b>
• Overview-----	145
<b>Chapter 11 – Time Tracker-----</b>	<b>147</b>
• Overview-----	149
<b>Chapter 12 – Knowledge Base-----</b>	<b>151</b>
• Overview-----	153
• Add Knowledge Base Article-----	154
• Search the Knowledge Base-----	155
• Preview and Print a Knowledge Base Article-----	155
<b>Chapter 13 - Scheduler-----</b>	<b>157</b>
• Overview-----	159
• Add a New Follow-up Item-----	160
• Modify a Follow-up Item-----	161
• Delete a Completed Follow-up Item-----	161
• Print SnapShot Report-----	161

<b>Chapter 14 - Report Manager</b> -----	<b>163</b>
• Overview-----	165
• Add a New ExecReport-----	166
• Modify an ExecReport Name-----	167
• Delete an ExecReport-----	167
• Preview and Print an ExecReport-----	167
 <b>Glossary of SDS HelpDesk Terms</b> -----	 <b>169</b>