

NetSupport ServiceDesk
Getting Started Guide

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WELCOME

NetSupport ServiceDesk is a powerful yet easy-to-use browser-based help desk, available on its own or as part of the full NetSupport DNA Asset Management suite. NetSupport ServiceDesk helps you effortlessly track, organise, manage and answer the toughest desktop support challenges.

Supporting the essential ITIL processes – Incident, Problem, Change and Service Level Management - NetSupport ServiceDesk ensures your support team can effectively manage customer expectations and minimise the amount of system downtime.

With a fully customisable and intuitive web-based interface that supports both desktop and mobile platforms, robust workflow processes, a wealth of management reports and a customer-friendly self-service portal, NetSupport ServiceDesk is guaranteed to take the strain out of service delivery!

DEFINITIONS

Administrator

The user(s) who has full access to NetSupport ServiceDesk functionality. They can perform all tasks required in running a successful service desk, from creating user accounts to resolving reported problems.

ServiceDesk Operator

Responsible for providing technical support to end-users, ServiceDesk Operators have sufficient rights to be able to oversee the problem resolution process. Your licence will determine how many ServiceDesk Operators you can have.

Operator

This type of user account can be used as a generic repository for Incidents, Problems and Change Requests. It does not give the user access to ServiceDesk and does not impact on your licence levels.

End-user

An end-user is the Client or User who needs the ability to report a problem. You can have as many user accounts as required without it affecting your licence levels.

FEATURES

Incident Management

The key to effective Incident Management is being able to minimise the impact on day-to-day business operations, restoring normal service as quickly and efficiently as possible. NetSupport ServiceDesk's automated workflow processes help you achieve this by delivering the following as standard:

- Customers can log incidents on-line and review current status in real time.
- Automated incoming/outgoing email processing.
- Automatic assignment of incidents to operators based on pre-defined customer rules for either problem type or user type.
- Automatic escalation of incidents based on customer specific rules.
- Structured notes history for an incident with source identifiers (telephone, email and more) for each additional entry within the items lifecycle.
- Use in conjunction with NetSupport DNA to retrieve a full Hardware and Software Inventory for each user's system.
- Ability to attach, store and associate files to an incident.
- Avoid duplicating effort by connecting multiple related incidents.

- Automatic priority assignment for new incidents.
- Accurate recording of time spent dealing with incidents.
- Prioritised help requests for users and incident types, together with easy operator allocation.
- Help request logging with customisable categories for easy input.
- Pre-populated incident templates.
- Pre-populated solutions database enables customers to search for an answer before they log an incident.

Change Management

NetSupport ServiceDesk helps you introduce a set of defined methods and procedures for the efficient and prompt handling of change requests. Automated workflow processes ensure appropriate communication; reporting and approval mechanisms are in place at each stage of the lifecycle.

User Management

- Active Directory synchronisation.
- Allow end-users to generate NetSupport ServiceDesk logon accounts or restrict generation of end-user accounts to administrators and ServiceDesk operators.
- Import user departments and companies from other systems into NetSupport ServiceDesk.
- Assign ServiceDesk operators to specific companies and departments in the user hierarchy.
- Pre-define the members of a Change Advisory Board (CAB) for each category of change request.

Problem Management

The key to successful Problem Management is being able to reduce the volume of incidents being logged in the first place. NetSupport ServiceDesk enables you to proactively investigate and resolve the root cause of issues, leading to:

- Improved reliability of services.
- A reduction in the volume of reported incidents, thus lightening the load on your service desk.
- Delivery of permanent solutions rather than constant workarounds.
- Improved customer satisfaction.
- Increased knowledge within the service desk.

Problem managers can utilise a range of tools (including report dashboards and advanced searching), to help them identify trends and link related incidents to a problem. Once a resolution is found, the relevant incidents are automatically closed.

Service Level Management

Service Level Management is one of the core components of the ITIL Service Delivery framework. If a healthy relationship between the customer and IT team is to be maintained it very much relies on the ability of the ServiceDesk to deliver efficient and cost effective services within agreed timescales. With NetSupport ServiceDesk you can:

- Establish condition based workflow rules for incidents, problems and change requests that are continually checked against stored SLA's.
- Give instant visibility to imminent service bottlenecks to ensure relevant items can be actioned before impacting on service performance.
- Gather historical and real-time data on service performance.



- Tracking and reporting service performance against SLA's on an ongoing basis.

Integration

NetSupport ServiceDesk integrates seamlessly with other NetSupport and third-party Network Management solutions to provide you with the range of complementary tools you need to provide a complete support offering:

- Direct integration with NetSupport DNA Asset Management Suite.
- Direct integration with NetSupport Manager Remote Control.

Reporting

Information is key and one of the main principles of NetSupport ServiceDesk is to offer you the means to capture comprehensive statistics, ensuring you are fully informed in order to make effective decisions.

However, the data gathered must be made available in an intuitive and user- friendly format, otherwise the efficiency benefits gained from implementing NetSupport ServiceDesk will be cancelled out by the time spent filtering this information and manipulating it into a useable format.

NetSupport ServiceDesk offers great flexibility: The reports dashboard enables you to manipulate data to suit your specific needs. On-screen results are provided in a tabular and/or bar and pie chart format. Multiple reports can be presented side by side for easy comparison. This option is backed by a set of common status reports provided as standard with the product. You can even create your own reports (containing HTML, text and supporting graphs) using the intuitive "drag & drop" custom report designer.

Customisation

- Custom data designer allowing for customised data fields.
- Profiled operator access and customised functionality.
- Streamlined creation of a solutions database to aid future help requests.
- Use the intuitive design tool available to administrators to add custom data items to records.
- Custom report designer.
- Personalised "Home" page based on each operator's individual requirements.
- Personalised "Exit" pages.
- Multilingual user interface.

Escalations & Notifications

- Send email notifications using fully customisable email templates.
- Automatic escalation of incident based on customer-specific rules.

INSTALLATION

Planning an Installation

Before commencing your installation of NetSupport ServiceDesk, ensure the system pre-requisites are met in terms of end-users being able to access NetSupport ServiceDesk via their web browser and the presence of a suitable environment in which to host the database.

The on-screen instructions in the NetSupport ServiceDesk Installshield wizard will guide you through the process and at the end of the installation you will be asked to configure your personalised NetSupport ServiceDesk settings.

System Requirements

Server

Windows 2003, 2008 and 2012 Server.
Windows XP Professional SP3 (not recommended as this will only allow 10 concurrent sessions).

Note: For further information when installing on Windows 2008 Server, Windows 7 or Vista machines, please refer to the following article on our online knowledge base:

www.netsupportsoftware.com/support/td.asp?td=628

The Server must also have Internet Explorer 7 or later installed.

Note: 64bit platforms must be set to run IIS in 32bit mode.

Client

Windows XP, 2003, Vista, 2008, Windows 7, Windows 8 and 8.1 (in non Metro mode), Mac and Linux.

The Client must be running one of the following browsers:
Internet Explorer: version 7 and above
Firefox: versions 26 and later
Chrome: version 35 and later.

Note: For the Remote Control integration, the Host OS for the Client must be Windows 2000, 2003, XP, Vista, 2008, Windows 7, Windows 8 and 8.1.

Database

SQL Server 2000 and above.

Note: If an SQL server is not available, MSDE version 2 can be installed with the application.

Reports

Adobe Flash Player is required to view reports.

Support for mobile devices

NetSupport ServiceDesk provides built-in support for mobile devices ensuring that operators working remotely can still receive and update items.

NetSupport ServiceDesk will automatically detect when it is accessed from a mobile device and display a set of simplified pages that can be used from most common mobile devices. If your mobile device is not automatically detected, please refer to the following article on our online knowledge base for more information:

www.netsupportsoftware.com/support/td.asp?td=555

Note: To use the 'Pin to Taskbar' feature in Windows 7 or later you will need to remove certain words from the 'Reserved list'. Please refer to knowledgebase article 582 for further information

www.netsupportsoftware.com/support/td.asp?td=582

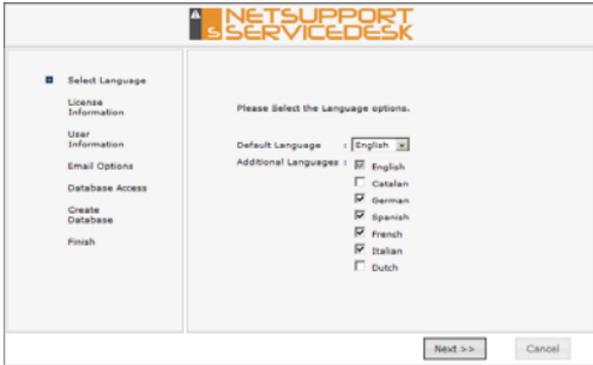
Installing NetSupport ServiceDesk

The NetSupport ServiceDesk Installshield wizard will guide you through the installation process, enabling you to quickly configure the NetSupport ServiceDesk database on your chosen server. After installation you will need to restart the PC in order to complete the setup.

1. When setup commences, the Installshield wizard Welcome screen will appear. Click **Next** to continue.
2. The NetSupport ServiceDesk Licence Agreement will appear. Please take a few moments to read the agreement and only proceed if you agree to the terms of the Licence.
3. Select the appropriate environment in which to host the NetSupport ServiceDesk database. This can be an existing SQL Server or Microsoft's Database Engine (MSDE). Click **Next**.
4. Confirm the location for the setup files. The default folder is **c:\Program Files\NetSupport\NetSupport ServiceDesk**. Click **Next**.
5. Review the details of the installation and click **Next** to start copying the setup files.
6. When the installation has finished, you will be prompted to restart the machine. You need to do this in order to complete the setup. Click **Finish** to restart.
7. When you logon after restart, the NetSupport ServiceDesk setup wizard will appear.

NetSupport ServiceDesk Setup Wizard

The NetSupport ServiceDesk Setup wizard completes the installation process. The wizard prompts you for your default configuration settings - such as your licence information, company details, email server settings and the database access details. These items can be adjusted by an administrator within NetSupport ServiceDesk once installed.



Select Language. NetSupport ServiceDesk provides multi-language support allowing Operators and end-users to easily customise the interface to reflect a chosen language. At the set up stage, you can specify the default language as well as any additional languages that may be needed. When logged into NetSupport ServiceDesk, you simply click the relevant language button displayed on the toolbar and the interface will change to that language. You can also change the default language from within NetSupport ServiceDesk in the **Customise - Appearance** section and add additional languages by selecting **Admin-Customise** from the toolbar.

Licence Information. Enter your company name and confirm your Licence information. If you are evaluating the product, use the default serial number **Eval**; otherwise enter the serial number and Licence code you have been supplied with.

User Information. NetSupport ServiceDesk users are grouped by company and department, mirroring the structure of your organisation. The details entered here will be used to create the initial company and department in the NetSupport ServiceDesk database. A default 'Admin' user is created with full access rights. Others can be added by the system administrator once logged in.



Email Options. NetSupport ServiceDesk can be configured to send automated email notifications. To use this feature, you must specify your SMTP server settings. Specify the sender's email address; this must be a valid address that exists on the server. Enter the sender's full name. The sender's details would generally be those of the system administrator. After installation, you can change these details by accessing the **Mail Server Settings** option where you can also configure a POP3 server in order for NetSupport ServiceDesk to track incoming emails.

Database Access. Finally, enter the details used to access the database server. Enter the server name/address and confirm the port number that the server is listening on. Confirm the database name, user name and password. If the database is hosted on a SQL Server, you can use the default settings.

The database will now be created at the specified location and, when complete, you will be advised of the URL required to access the NetSupport ServiceDesk database via each user's web browser.

STARTING NETSUPPORT SERVICEDESK

Start your web browser and enter the URL address of the NetSupport ServiceDesk application (i.e. the Server IP address where you installed NetSupport ServiceDesk). You may prefer to create a shortcut on the desktop for future use.

The Logon screen will appear.



The logon process requires the user's email address and a password. Should a user forget their password, they can ask for an email reminder to be sent.

Note: For first time use after installation, a default administrator logon is provided which comes with full functionality rights. Email Address: **Admin**, Password: **dna**. The person acting as the administrator should change the password at the earliest opportunity.

If a user attempts to log on with an email address that doesn't already exist in the NetSupport ServiceDesk database, they will be asked to complete their details. By submitting their details, a user account will be created but it will have limited rights. A user with appropriate permissions can edit the details if required.

Note: To prevent first time users creating their own accounts, see **Admin - Customise, Create Users** when they first log on.



A language identifier is displayed, allowing the user to switch the language for NetSupport ServiceDesk. The available languages can be set during installation or within NetSupport ServiceDesk: select the Admin tab, click the **Customise** icon and select the **Additional Languages** icon from the toolbar.

After logging on, the user's default start page will appear. This can be changed in User Preferences.

Logoff

To exit NetSupport ServiceDesk, select the Home tab and click the **Logout** icon in the toolbar.

Note: You can have a custom logoff page displayed to users when they exit NetSupport ServiceDesk. Select the Admin tab, click the **Customise** icon in the toolbar, select the Appearance tab and enter a URL to your custom page in the **Custom Logoff page** option.

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