

## **ServiceDesk Plus - MSP Training Agenda**

OEM: ManageEngine • Code: ME-SDPMSP

### **COURSE DESCRIPTION**

This document outlines the training plan for ManageEngine ServiceDesk Plus - MSP. The training will cover most of the features/components of the product within the mentioned duration shortly. We will provide various use cases / best practices / problem faced by our users in their day today work and how ManageEngine ServiceDesk Plus MSP (MSP SDP) solves them during this session. We will not configure or Implement during this session completely (End-to-End). We will the explain only the basic details during this session. Customers need to try the configurations of their own after this training.

### **AUDIENCE PROFILE**

- ServiceDesk Plus - MSP is specifically for Managed Service Providers.
- IT Help Desk Managers looking forward to optimize and streamline IT Support Operations
- IT Help Desk Administrators responsible for managing service levels by efficiently managing requests
- IT Support Staff

### **PREREQUISITES**

- No prior knowledge or experience is required.

### **COURSE OBJECTIVES**

**By the end of this course, participants will be able to:**

- ServiceDesk Plus - MSP Training helps IT Managers, Administrators, and staff to get a head start in understanding and implementing an effective IT Help Desk Solution. At the end of the course, you will be able to answer
- What is ServiceDesk Plus - MSP ?
- Who are the audience ?
- What is Account Management ?
- Who is a Technician and Requester ?
- How to set up Incident and Service catalog ?
- About Automation and SLA's
- How to assist your customer - Remote Control Assistance ?
- How to bill a customer ?
- How to create a project for a customer ?

- Define Problem Management ?
- Define Change Management ?
- Define CMDB ?
- How to Enable a self-service and knowledge management portal ?
- Knowledge Base ?
- Re-branding - Account Personalization
- How to Discover and manage assets ?
- How to Manage Software and Hardware inventory ?
- How to Handle Purchase and Contract management ?
- Reports
- About API
- Access your tickets from anywhere - About Iphone and Android Applications

## COURSE OUTLINE

### Module 1: Introduction to ServiceDesk Plus MSP

- ServiceDesk Plus - MSP Overview
- Benefits of a ServiceDesk Plus - MSP

### Module 2: Understanding the MSP Model

- If you are a company that manages the IT help desk of your and other companies, you need ServiceDesk Plus - MSP. Here, you are a managed service provider who provides IT infrastructure related support to different customers. The configurations that you create will be specific to each customer. You will charge these customers for the service that you provide. The focus here is on the customer. Your employees are IT technicians who handle IT related support requests from employees of your customers.

### Module 3: Account Management

- About MSP organization
- About Account
- About requesters and technicians
- Define Support Staff Roles
- Ways to create a requester and technician

### Module 4: Implementing ServiceDesk Plus - MSP in your Organization

- Define Locations, Department, Operational Hours, and Holidays
- Channels of Support - Email / Intranet website / Phone
- About Configuring SDP MSP - Urgency, categories, priority, Level and other Helpdesk configurations

### Module 5: Incident Management and Service Catalog

- Ticket Categorization
- Request Tracking

- Automate with Business Rules
- Request Escalation using SLA
- Configure Notifications
- Time-Tracking
- Technician Auto-Assign / Load Balancing
- About ZOHO Assist - Remote Assistance Setup

## **Module 6: Automated Billing - Charge your clients**

- About Service Plan
- About Contract Billing
- About Billable and Non-Billable tickets
- Bill Generation

## **Module 7: Project Management**

- About Project Management
- Benefits of Project Management
- Project Configuration
- Project Roles
- Project Operations
- Overview map and Gantt Chart

## **Module 8: Problem Management**

- Problem Detection & Classification
- Problem Priority
- Problem Analysis
- Solutions, Work Around, and Known error record
- Problem Closure

## **Module 9: Change Management**

- Defining Change Status, workflow and templates
- Initiate Change Request
- Change Plans and CAB (Change Advisory Board)
- Approval from CAB Members
- Implementing a change as a project
- Post Implementation Review
- Change History

## **Module 10: Asset Management**

- Asset Discovery - Agent Deployment
- Asset Configuration
- Credential Library

- Managing assets - Asset Lifecycle
- Depreciation
- Software Configuration
- Software License Management
- Managing compliance

## **Module 11: Hardware and Software Inventory**

- Windows Domain Scan
- Network Scan
- Schedule Periodic Audits
- Software License Compliance
- Manage hardware inventory

## **Module 12: CMDB**

- Discover Assets
- Detailed Asset Inventory
- Software Library
- Asset Relationships

## **Module 13: Self Service portal**

- About Self Service Portal
- Creating a New Request
- Checking Status of previous Requests
- Searching Solutions
- Updating Contact Details
- Solutions Database
- Public and Private solutions
- Announcements
- Rebranding

## **Module 14: Purchase Management & Contract Management**

- Purchase cycle overview
- Create POs
- Submit for Approval
- Accept / Reject PO
- Approved POs to vendors
- Receive or Partially receive Items
- Contracts Management
- Track & Manage Contracts from multiple vendors

## **Module 15: Survey**

- Define Survey and satisfaction levels

## **Module 16: Reports**

- Over 100's of Inbuilt Reports
- Customizable Dashboards, Custom Reports, and Query Reports
- Category based Reports
- SLA violation Reports
- Pending, Completed, and Overdue Request Reports
- ZOHO Reports Integration

## **Module 17: About Integrations and Accessibility**

- About API
- About Iphone and Android Apps

## **Module 18: Crash Recovery Tips - Periodic Backups**

- Configure and schedule Backups
- Data Archiving