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## *Web-Based Consulting*

### **Ten, One Hour Sessions of Training on HelpSTAR®**

Once installation has been completed an ITIL certified consultant will train your HelpSTAR® administrator. The following is an outline of the one hour sessions.

#### *Session 1 - Queues & Categories*

- Best Practices and Implementation Assistance
- Queues – skill based (assist with identifying queues)
- Categories (assist with identifying categories)
- Role Based Access Control (if applicable)

#### *Session 2 - Overview of Workflow*

- Requests from End Users (submission via web and email)
- Assignment to queue – including prioritization
- Ownership
- Update requests by support reps
- Time statistics
- Closure
- Web Interface Setup Options

#### *Session 3 - User Defined Fields*

- Overview of User Defined Fields
- Explanation of Field Types and uses
- Creation for use in automation and reporting
- Creation of request types

#### *Session 4 - Business Rules*

- Main function of rules
- Service Request and Email Rules
- Creating new rules
- Business Rules for Service Management
- Business Rules for Routing Automation
- Business Rules for Notifications

#### *Session 5 - Projects & Project Templates*

- Parent/Child Relationships
- Creation of Child Task
- Merging Requests into Projects

##### **Project Templates**

- Common uses for Project Templates
- Field Control within Project Templates
- Use of Create After Events
- Onboarding Setup

#### *Session 6 - Purchasing & Assets*

- Lifecycle of a Purchase Request
- Product and asset creation
- Configuring discovery schedules
- Documenting discovered hardware
- Documenting discovered software
- License Compliances

#### *Session 7 - Data Analysis*

- Time Statistics Tracking
- Charts/Dashboard
- Queries
- Standard Reports
- Custom Reports

#### *Session 8 - Other Settings & Functions*

- Quick Requests
- Business Hours
- Memo Templates
- Priority Escalation
- User Options

#### *Session 9 & 10 - Free-Flow Sessions*

- Support Rep Training or
- General Question and Answer or
- Implementation Assistance or
- Expansion of one of the above sessions

