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# *Web-Based Consulting*

## **Five, 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 - Queue & Category Creation*

- Best Practices and Implementation Assistance
- Role Based Access Control (if applicable)

#### **Overview of workflow including:**

- Requests from End Users (submission via web and email)
- Assignment to queue (including prioritization)
- Queues – skill based (assist with identifying queues)
- Categories (assist with identifying categories)
- Ownership
- Update request by Support Rep
- Request time statistics
- Closure
- Web Interface Setup Options

### *Session 2 - 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 3 - 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

#### **Projects:**

- 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 4 - Projects & Project Templates*

#### **Data Analysis:**

- Time statistics tracking
- Charts
- Dashboard
- Queries
- Standard Reports
- Custom Reports

#### **Asset Management**

- Product and asset creation
- Configuring discovery schedules
- Documenting discovered hardware.
- Documenting discovered software
- License Compliances

