

## Web Help Desk Training Outline

- I. Days 1-3 – Administrator Training
  - a. Introduction to Web Help Desk
    - i. Server requirements
    - ii. Database requirements
    - iii. Other system requirements
  - b. Installing Web Help Desk
    - i. Installing on various OS platforms
    - ii. Upgrading WHD
    - iii. Database migration options
    - iv. Deploying WHD as a virtual appliance
    - v. Deployment considerations
  - c. Getting started with WHD
    - i. Launching the application
    - ii. Configuring the database
    - iii. Creating an Email account
    - iv. Creating user accounts
    - v. Adding and editing custom request types
  - d. Configuring Web Help Desk
    - i. Strategy for Configuration
    - ii. General Settings
    - iii. Setting up Email
    - iv. Entering Locations and Departments
    - v. Setting up Tickets
    - vi. Adding clients
    - vii. Defining Techs
    - viii. Adding Assets
    - ix. Designing Processes
  - e. Managing clients
    - i. Manually adding a new client web
  - f. Managing tickets
    - i. Ticket flow
    - ii. Working with ticket details
  - g. Managing Assets
  - h. Change Management Processes
  - i. Managing Security

- j. Managing FAQs
- k. Working with Parts and Billing
- l. Working with Reports
- m. Working with Surveys and Messages
- n. Discovering Assets
  - i. Configuring Discovery tools
  - ii. Removing assets
  - iii. Synching and Discovering Assets
- o. Importing Data
- p. Converting SolarWinds Orion Alerts into WHD Tickets
  - i. Orion to WHD Communication
  - ii. Enabling SolarWinds to share Alerts
  - iii. Entering the Orion Server Link into WHD
- II. Day 2 – Technical end User Overview
  - a. Logging into the WHD web console
  - b. Navigating the WHD website
  - c. Understanding the available resources on WHD web views
  - d. Creating and viewing reports
  - e. Managing tickets with WHD
- III. Day 3 – Service Desk User Overview
  - a. Logging into the WHD web console
  - b. Navigating the WHD website
  - c. Understanding the available resources on WHD web views
  - d. Creating and viewing reports
  - e. Managing tickets with WHD