

## ***CHAPTER 4***

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### **IMPLEMENTATION CHECKLIST**

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- Overview
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- Implementation Checklists



## **CHAPTER 4 -- Implementation Checklist**

### **Overview**

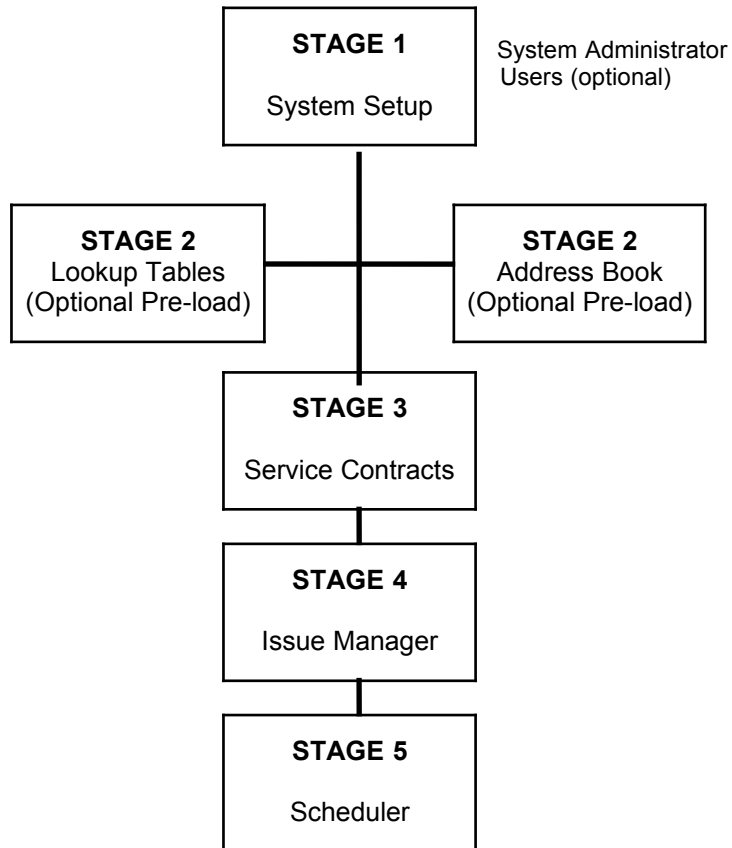
**Chapter 3: Getting to Know SDS HelpDesk** explains how to implement the program using the Setup Wizard and the Work Flow Wizard. This chapter presents setup information in a slightly different way.

A flow chart is provided that shows the recommended stages for implementing SDS HelpDesk. **Stage 1** is the most critical and needs to be completed by the system administrator. **Stage 2** shows two modules where it is more efficient for users if initial information is preloaded. If you already have customers with service contracts, you may want to consider also preloading this information in **Stage 3**. **Stages 4 and 5** can be implemented in any order, and information can be added on-the-fly.

Checklists are furnished for each stage with a list of items that need to be set up or considered. The checklists do not include step-by-step instructions. Refer to **Chapters 5-10** for details.

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**Recommended Implementation Stages**



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### Implementation Checklists

Use the following checklists as a quick guide for initially setting up the SDS HelpDesk. Some items, like those listed in the system setup for the administrator, should be completed before others begin to use the program.

Detailed instructions for each of these items can be found in the chapter shown next to it.

#### Stage 1: System Setup

##### System Administrator Items:

|  | Chapter No. |
|--|-------------|
| • Set up the path to the database (this only needs to be done if the database is moved to another computer).           | 5           |
| • Enter your organization name into the system.  | 5           |
| • Set or reset Help and Report file locations (this only needs to be done if the files are moved to another computer). | 5           |
| • Set up users, permissions, and initial passwords.  | 5           |
| • Set format for service contract codes.   | 5           |
| • Set format for issue codes.  | 5           |
| • Define and then rename issue location labels.  | 5           |

##### User Items (Optional):

|  | Chapter No. |
|--|-------------|
| • Customize workstation font colors.                           | 5           |
| • Change user password.  | 5           |
| • Enable or disable prompt message for adding data on-the-fly. | 5           |

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### **Stage 2: Pre-load Most Commonly Used Information**

This is not mandatory. However, pre-loading some of this information increases user efficiency.

#### **Lookup Tables - Set up by System Administrator**

|   | <b>Chapter No.</b> |
|---|--------------------|
| • Build an initial list of issue categories and subcategories.  | 6                  |
| • Define 1-4 levels of issue locations.   | 6 or 5             |
| • Once defined, modify default location labels.   | 6 or 5             |
| • Build an initial list of primary locations.   | 6                  |
| • Build an initial list of secondary locations.   | 6                  |
| • If needed, build initial lists of third and fourth level locations.   | 6                  |
| • Define an initial list of issue priorities.   | 6                  |
| • Define an initial list of issue status levels.  | 6                  |
| • Build an initial list of contact organization names here or in Address Book.  | 6 or 7             |
| • Define an initial list of contact types (e.g., customer, employee, vendor, etc.) here or in Address Book.                 | 6 or 7             |
| • Define an initial list of Service Contract levels (e.g., unlimited, warranty, per incident) here or in Service Contracts. | 6 or 8             |
| • Define an initial set of contract durations (e.g., annual, quarterly, 30 days) here or in Service Contracts.              | 6 or 8             |

#### **Address Book Manager**

|   | <b>Chapter No.</b> |
|---|--------------------|
| • Build an initial list of contact organization names here or in Lookup Tables. You can add additional names on-the-fly in other modules.       | 7 or 6             |
| • Define an initial list of contact types (e.g., customer, employee, tenant, vendor) here or in Lookup Tables.                                  | 7 or 6             |
| • Define an initial list of contact skills (e.g., management, sales, tech support, plumbing, electrical, programming) here or in Lookup Tables. | 7 or 6             |
| • Add as much or as little contact information as you need to get started.  | 7                  |

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### **Stage 3: Add Service Contracts**

|   | Chapter No. |
|---|-------------|
| • Define an initial list of Service Contract levels (e.g., warranty, single site, per incident) here or in Lookup Tables. | 8 or 6      |
| • Define an initial list of contract time durations (e.g., annual, 120 days) here or in Lookup Tables.                    | 8 or 6      |
| • If appropriate, define Per Incident blocks.   | 8           |
| • The contract code format needs to be set up by the system administrator.  | 8           |
| • Add as much or as little Service Contract information as you need to get started.                                       | 8           |

### **Stage 4: Add Issue Manager**

|  | Chapter No. |
|--|-------------|
| • Build an initial list of issue categories and subcategories here or in Lookup Tables.          | 9 or 6      |
| • Build an initial list of primary locations here or in Lookup Tables.                           | 9 or 6      |
| • Build an initial list of secondary locations here or in Lookup Tables.                         | 9 or 6      |
| • If needed, build an initial list of third and fourth level locations here or in Lookup Tables. | 9 or 6      |
| • Define an initial list of Issue status levels here or in Lookup Tables.                        | 9 or 6      |
| • Define an initial list of issue priority levels here or in Lookup Tables.                      | 9 or 6      |
| • Define an initial list of condition categories and values.                                     | 9           |

### **Stage 5: Add Scheduler**

|                              | Chapter No. |
|------------------------------|-------------|
| • Add information on-the-fly | 10          |

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