

SERVICE DEFINITION FOR SERVICEDESK PLUS

ADMINISTRATOR'S GUIDE



Product Version: 2.x

TABLE OF CONTENTS

1. Service Definition Installation	3
Hardware and software requirements.....	3
How to install Service Definition.....	3
How to connect to Service Definition	4
How to uninstall the Service Definition application.....	4
2. Initial configuration tasks.....	5
How to configure the email server	5
How to change the administrator’s user name, password and email address	5
3. Creating and editing content	6
How to create new content.....	6
How to copy and paste texts from Microsoft Word.....	7
Working with hyperlinks.....	8
How to edit content	8
How to delete content	8
How to place content into the Top Menu or Administration Menu	8
4. Working with files and images	9
How to insert an image within a content page	9
How to include a link to a file.....	10
How to insert images with link maps.....	10
5. Using the Glossary	12
How to edit, add and delete glossary terms	12
Linking pages to a Glossary term to create detailed definitions or articles	12
6. Using the Advanced Search module	13
How to search and replace all instances of a specific text	13
7. Backing up and restoring your data	14
How to back up your Service Definition installation	14
How to schedule automatic backups	14
How to restore a backup copy.....	14
8. Customizing the product logo and splash screen.....	15
How to replace the product logo with your own image file.....	15
How to replace the Splash image on the welcome page	15
How to replace the site shortcut icon (favicon)	15
9. Getting technical support.....	16

1. SERVICE DEFINITION INSTALLATION

Hardware and software requirements

The minimum hardware and software platform requirements are the following:

- Hardware: Pentium IV or similar, with at least 1 GB RAM and 1 GB of disk space.
- Operating System: Windows XP Professional, Windows Vista, Windows 7, Windows Windows Server 2003, Windows Server 2008. Compatible for both 32-bit and 64-bit versions.

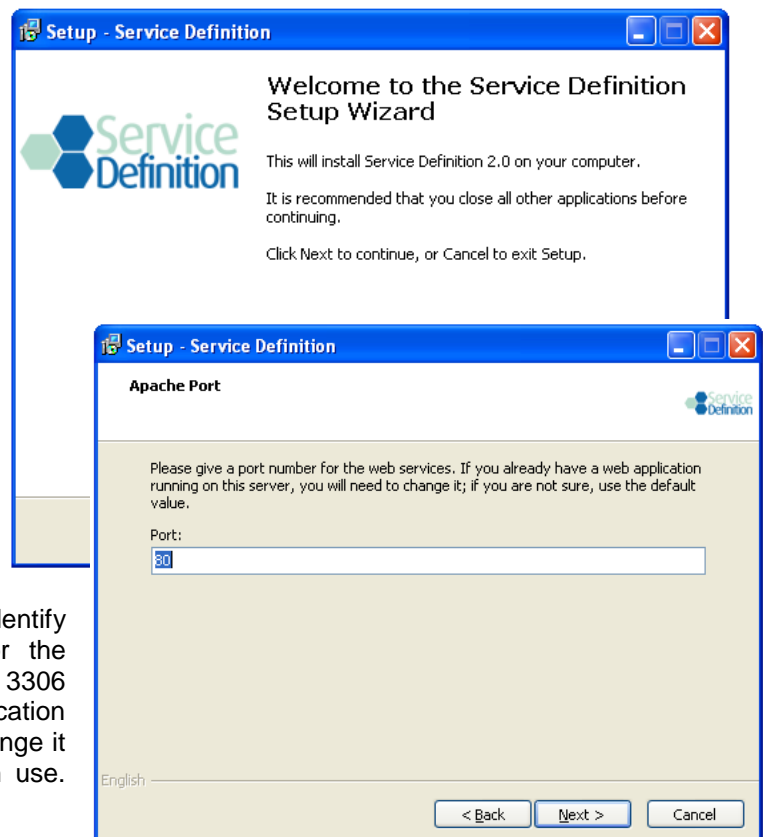
There are no specific database or web platform requirements, as these elements are included in the base product.

Note: The Service Definition license only allows the product to be installed in the computer that has been identified as the Licensed Server. To change your license or for more information regarding this limitation, please contact support@servicedefinition.com or a Service Definition Authorized Partner.

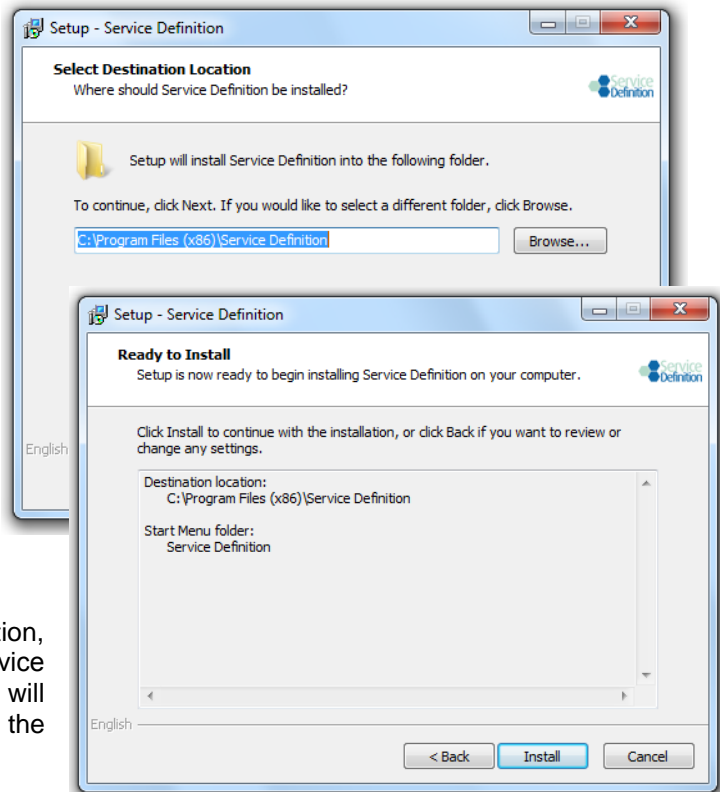
How to install Service Definition

To install the product, run the application **setup.exe**.

1. On the Welcome screen, select **Next** to begin the installation process.
2. On the **Apache Port** screen, it is recommended to use port 80, which is the default port for HTTP traffic; if this is not possible (because other applications are using this port) you may use any other port that is not in use (for example: 8080 or 8081). Once the port is entered, select **Next**.
3. On the **MySQL Port** screen, identify the port you want to use for the database. By default, the port is 3306 but if there is already an application that uses this port, you may change it to any other port that is not in use. Select **Next**.



4. Review the terms and conditions of your license and check the box “I accept the agreement”. Select Next.
5. Identify the directory where you want to install Service Definition. Select Next.
6. Select Next to place shortcuts to Service Definition in Start > Program Files.
7. On the Ready to Install screen, review the information and select install. The installation process should take about 3 or 4 minutes to complete although this time may vary in accordance to your computer’s features.
8. When completing the installation, the “Completing the Service Definition installation” screen will appear. Click Finish to exit the installation wizard.



How to connect to Service Definition

Once installed, users can connect to Service Definition using any standard web browser, using the URL <http://servername:port>.

For example, if the name of the machine is SERVER5 and you have installed it on port 8081, the URL would be: <http://server5:8081>.

It is not necessary to indicate the port if you have installed Service Definition on the default port 80. In this case, the URL would be: <http://server5>.

How to uninstall the Service Definition application

To uninstall the product, run the Uninstall application, located in **Start > Service Definition > Uninstall**. Normally, no reboot is necessary.

2. INITIAL CONFIGURATION TASKS

How to configure the email server

In order for the password reset function to work, Service Definition must be configured to send email. This is optional but highly recommended.

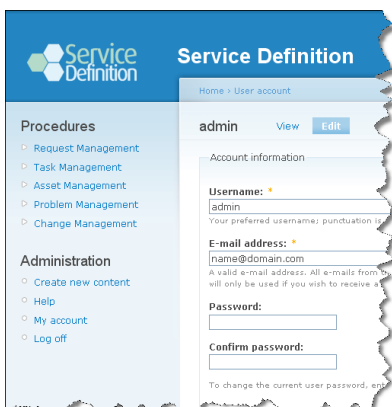
To configure the email server, follow these steps:

1. Find the **php.ini** file in c:\windows.
2. Make a backup copy of the file before you make any modifications.
3. Open the file using a text editor (like Notepad). Search for the following text (line 745):

```
[mail function]
; For Win32 only.
SMTP = localhost
smtp_port = 25
```

4. Change the word “**localhost**” for the name or ip address of your email server. If the server uses a different port than 25, change the value in **smtp_port** as well. (Note: your email server must be configured to permit relay from the Service Definition IP address.)
5. Save the changes to **php.ini**.
6. Restart the Service Definition services (from the Start menu, you have the options to stop and start the services; or simply reboot the server) and test the solution by clicking on “**Request New Password**” from the login page.

How to change the administrator’s user name, password and email address



To change the administrator’s user name, password and email address, log in as administrator (the default user name and password is “admin”) and select the **Edit** button from the link **Admin account** that appears in the Administration menu. From this page you will be able to set your email address, reset your password and even change your username if desired.

Don’t forget to indicate your email address on this page, so that if you forget your login details they can be sent to you by email using the “Request New Password” link.

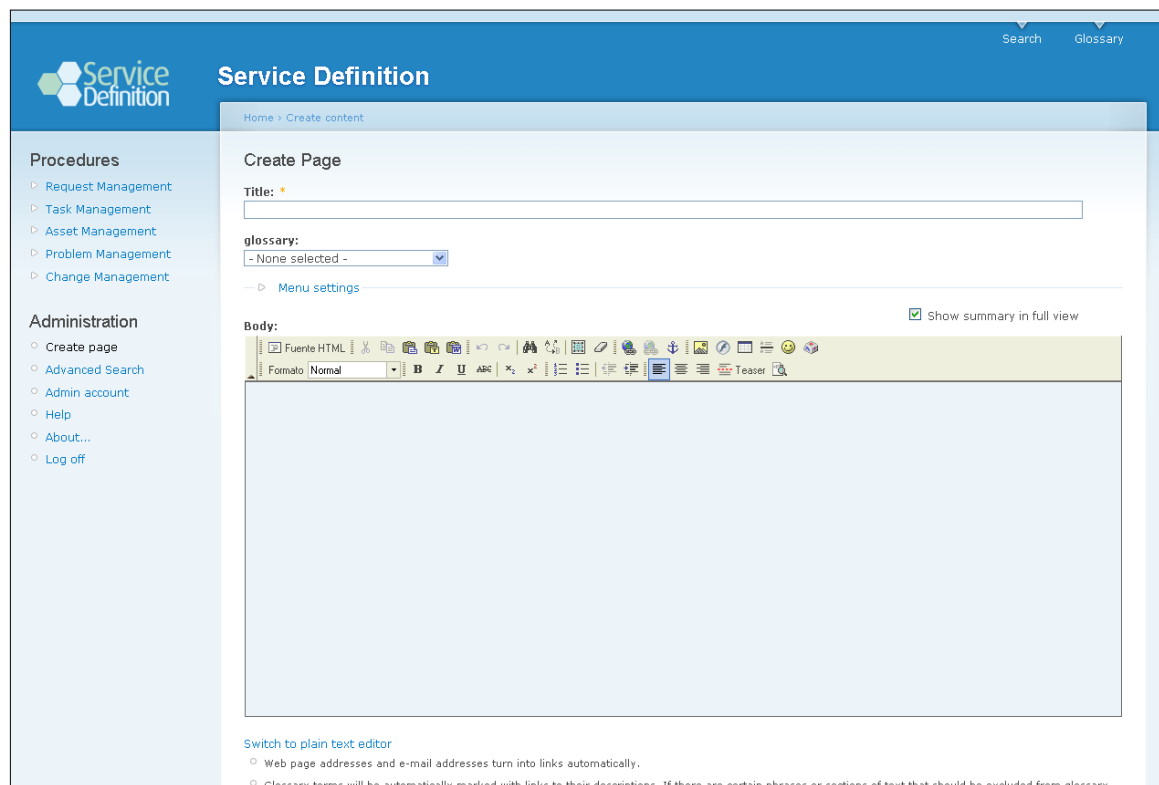
3. CREATING AND EDITING CONTENT

How to create new content

The Administrator may edit, publish, and modify pages through a very simple interface.

To create a new page, follow these steps:

1. From the welcome page of Service Definition, log in as administrator. The Administration menu will appear on the left.

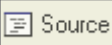


2. From the Administration menu, click on the link **Create page**. The Create Page window will appear, as shown below.

3. Fill out the form in the Create Page screen to create the new content:

- **Title:** The title that will appear on the top of the new page.
- **Glossary:** Normally you should leave this field blank, unless you want to associate the new page to a definition in the Glossary. This is useful if you want to create “articles” accessible from the Glossary, like an encyclopedia; for more information see [Using the Glossary](#) below.

4. The **Menu Settings** section allows the administrator to define where the new content will appear within the menu structure of Service Definition. Click on it to see the following options:
 - Menu Link Title: The text that will appear in the menu. If it's left blank, the page will not be accessible from the menu.
 - Parent Item: To locate the page within the menu hierarchy. By default, it will be located in the root (first level) of the main Service Definition menu.
 - Weight: This field allows you to indicate the order in which the item should appear in the menu. Items with a lower number will appear first. Items of the same weight are placed in the menu in alphabetical order.


5. The **Body** section is the main content of the new page. Use the button on the toolbar to add format to the text, insert graphics, etc. If you want to edit the HTML code directly, click on the **Source** button.
 

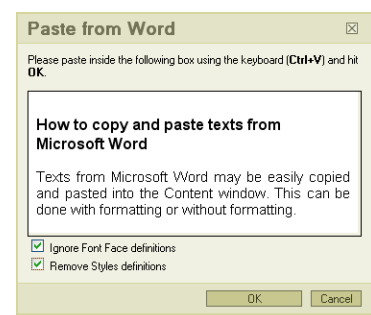
6. When you have finished, save the changes, clicking on the **Submit** button on the bottom of the page.

Note: The Switch to plain text editor link below the Body section allows you to edit the text without using the rich text editor. This is only recommended in cases where the rich text editor cannot be used due to your browser security settings

How to copy and paste texts from Microsoft Word

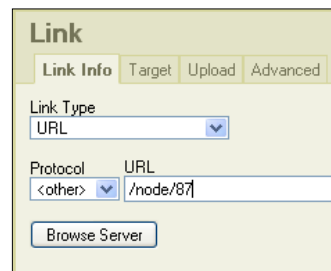
Texts from Microsoft Word may be easily copied and pasted into the body of the page. This can be done with formatting or without formatting.

To transfer the Word contents to Service Definition, copy the text in Word and paste it using the corresponding icon from the  toolbar. A window will open that will allow you to make modifications before pasting the text into the content window.



Once the text is pasted, review the results. Some final formatting may need to be done from the Service Definition text editor. It is important to bear in mind that some text items are visualized in a different way depending on the browser used; this is especially true of texts copied and pasted from Microsoft Word, because Word pastes its own HTML styles into the text.

Working with hyperlinks



The screenshot shows a dialog box titled "Link" with four tabs: "Link Info", "Target", "Upload", and "Advanced". The "Link Info" tab is active. It contains a "Link Type" dropdown menu set to "URL". Below it, there are two input fields: "Protocol" with a dropdown menu set to "<other>" and "URL" with the text "/node/87". A "Browse Server" button is located at the bottom left of the dialog box.

To add a hyperlink to a word or phrase in the body of the page, select the word or phrase and click on the **Insert / Edit Link** button from the Toolbar. A small window appears where you can indicate the parameters of the hyperlink.

When linking to another item within Service Definition, select the URL type **<other>** and use the relative paths such as [/node/87](#) or [/files/organigrama.gif](#).

Use the Target tab to establish whether the link should open a new window or not in the browser.

How to edit content

Enter the application as the administrator and edit the page you want (using the **Edit** button). Once you are in the edit view, you can modify the texts, HTML code, and menu options as described below.

If you do not see the Edit button, check to be sure that you are logged in as Administrator. Note, however, that you cannot modify System pages (such as the Help, About, and Welcome pages).

How to delete content

Log in as the user Admin, and edit the page you want to eliminate (using the Edit button). At the bottom of the page, click the **Delete** button at the bottom of the screen.

To remove the content from the menu structure without deleting the content itself, mark the option **Delete this menu option**. If you use this option, the only way to access the content will be by using a link from another page, or by writing the corresponding URL in the browser. Make note of the URL before deleting the menu option.

How to place content into the Top Menu or Administration Menu


By default, all contents are placed in the main "Procedures" menu that appears on the left of the screen. The "Top Menu" and "Admin menu" are normally used for the tools and documentation that is not often modified.

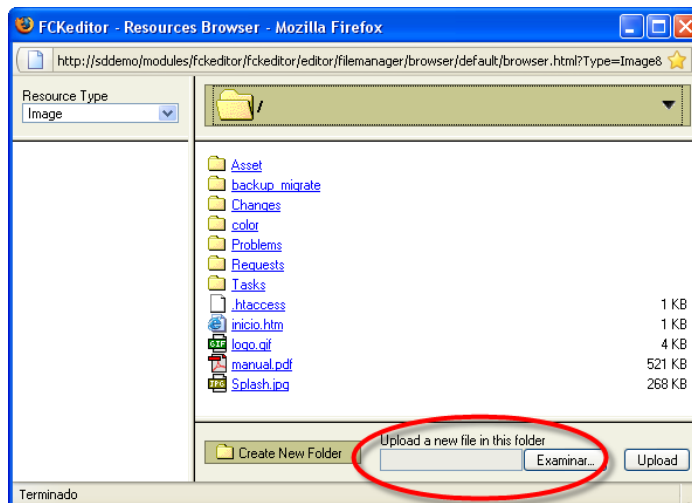
If you want to publish a page in the top menu, simply change the **Parent Item** to "Top Menu" and save the changes. Likewise, you can publish documents to the "Administration Menu" (note that this menu option will not be visible to normal users).

4. WORKING WITH FILES AND IMAGES

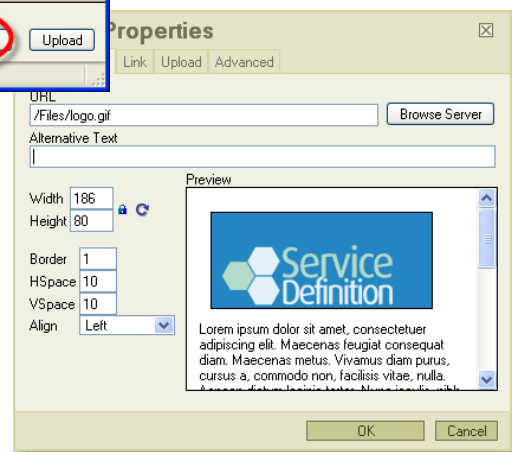
How to insert an image within a content page

To insert an image within contents, follow these steps:

1. Log in as the Admin user and click on the **Edit** button for the page you want to edit.
2. Place the cursor where you want to insert the image.
3. Click on the “Insert/ Edit image” button, which is located in the Contents toolbar. When clicking the button, an Image Property window will open. 
4. Click on **Browse Server** and navigate to the image file you want to insert. If the file is not in the Files directory yet, you can upload it by using the **Browse** button and then once you have selected the file, pressing the **Upload** button.



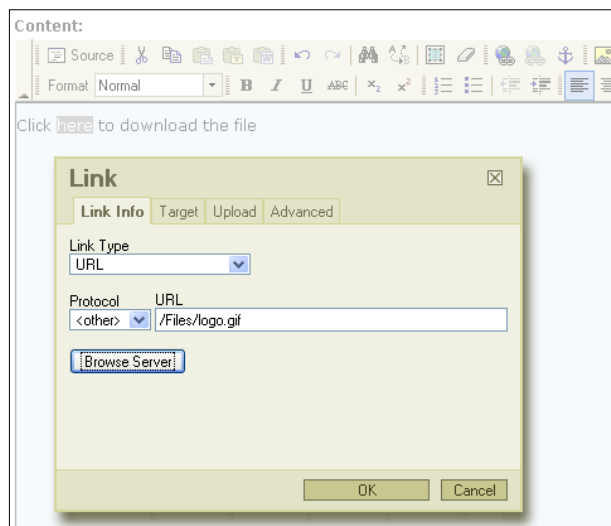
5. After selecting the image file, you will be able to adjust the image configuration with the options on the left (alignment, borders, horizontal and vertical space etc.)
6. Click **OK** to place the image within the contents.



How to include a link to a file

To include a link that will allow the user to open or download a file, follow these steps:

1. Edit the contents and select the text you want to convert into a link.
2. Click on the “Insert/ Edit” button in the Contents toolbar. A new “Link” window will open.



OK to save the changes and create the link.

3. State the Type of link in URL value.
4. Under **Protocol**, if the file is already in the Files Folder, select “<other>”
5. Click **View Server** and select the file. If the file is not located in the Files directory yet, you can upload it using the **Explore** button and once the file is identified, **Upload**.
6. Once you have selected the file from the Link window, click

Note: If you want to point the URL to a file that's not located in the Files directory, indicate the protocol and the URL, for example: <http://www.website.com/file.gif>

How to insert images with link maps

To create an image with links maps, follow the steps that are described below. In this example, Dreamweaver is used although other HTML editors can be used.

- 1) Insert the image file in the Files folder of Service Definition, following the instructions above.
- 2) With Dreamweaver, create a new HTML page. Select the Code tab and delete the HTML code.
- 3) Click on the Design tab and insert the image you want to map, using the Insert > Image menu.
- 4) Select the image by clicking on it with the mouse. Use the Map tools (under the Properties section) to select the graph areas. This will generate rectangular links on the selected areas of the image.

- 5) Click on the Code tab, and copy the HTML code.
- 6) In Service Definition, edit the text and click on the **HTML** button to see the HTML code.
- 7) Search for the code section where you have inserted the graph before. Select the relevant code and replace it by the HTML code you have copied from Dreamweaver.
- 8) Verify the HTML code:
 1. The location URL should start with **/files**, for example:
 2. Replace the # symbol with the destination URL. To link a map to a Service Definition page, use **/node/** and the content reference number.

For example, the code in Dreamweaver may be similar to the following:

```
 <map name="Map"><area shape="rect"
coords="147,3,295,50" href="#"><area shape="rect" coords="148,87,294,139" href="#"></map>
```

After changing the code in red, it should look like this:

```
 <map
name="Map"><area shape="rect" coords="147,3,295,50" href="/node/137"><area shape="rect"
coords="148,87,294,139" href="/node/138"></map>
```

- 9) Save the changes and check that the links have been properly created.

5. USING THE GLOSSARY

How to edit, add and delete glossary terms

When a Glossary term appears in the text, a link to its definition is created so that users can find out what it means, simply by hovering the mouse over the underlined term.

To edit a term to the Glossary, log in to Service Definition as Admin and click on the Glossary link on the top right of the main page. To edit a term, click on the Edit button next to the term.

At the bottom of the page, click on the link **Add term** and the Glossary Term form will open, allowing you to add the new term.



The image shows two screenshots from the Service Definition application. The left screenshot is the 'Edit term' form, which includes a 'Term name' field (containing 'Request for Change'), a 'Description' field (containing 'A formal request to initiate the Change Management process. Also called RFC, or Change Request.'), and buttons for 'Save' and 'Delete'. The right screenshot is the 'glossary' page, which features a navigation bar with 'Add term' and 'Edit glossary' links, a list of letters (A-Z) for filtering, and a list of glossary terms with their definitions and 'edit term' and 'search for term' links. The terms shown are Asset, Asset Tag, Assignment, Backout Plan, and Business Risk.

Linking pages to a Glossary term to create detailed definitions or articles

When you create or edit a Page, you can link the page to a specific Glossary term. This allows you to create "articles" (like an encyclopedia) containing more information than a simple definition. In this case the Glossary will show a link that enables the user to open the article.



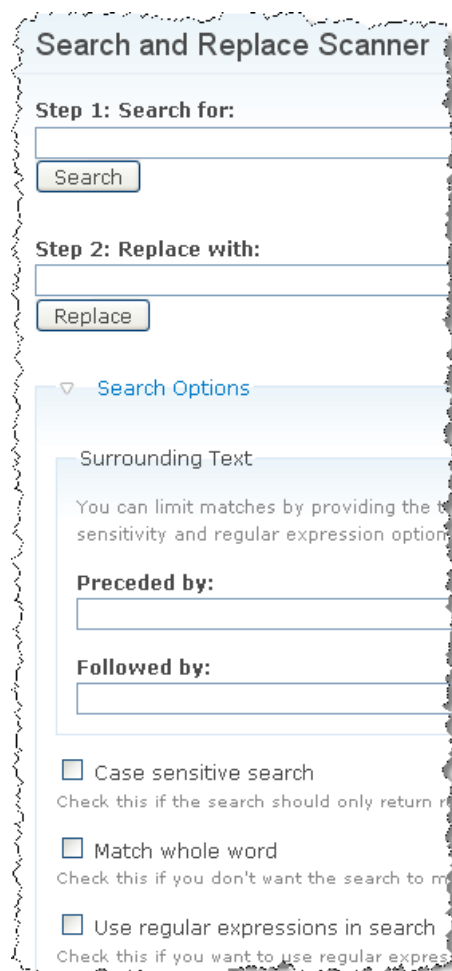
The image shows a close-up of a glossary entry for 'Rollout Plan'. It includes the term name 'Rollout Plan' with a 'search for term' link, a brief definition 'The steps to be followed in order to implement the Change.', and a link to the 'Detailed definition of Rollout Plan'.

6. USING THE ADVANCED SEARCH MODULE

How to search and replace all instances of a specific text

You can use the Advanced Search option in the Administration menu to modify all occurrences of a word or phrase.

For example, you may want to replace all instances of the word “Technician” for “Support Staff”. To do this, you can use the normal Search option and edit the occurrences of the word “Technician” one by one; but this can be tedious. The alternative is to use the Advanced Search module to search and replace all instances at once.



The screenshot shows the 'Search and Replace Scanner' interface. It is divided into two main steps:

- Step 1: Search for:** A text input field with a 'Search' button below it.
- Step 2: Replace with:** A text input field with a 'Replace' button below it.

Below these steps is a section titled 'Search Options' with a dropdown arrow. It contains several options:

- Surrounding Text:** A section with explanatory text: "You can limit matches by providing the... sensitivity and regular expression options".
- Preceded by:** A text input field.
- Followed by:** A text input field.
- Case sensitive search**
Check this if the search should only return results that are case sensitive.
- Match whole word**
Check this if you don't want the search to match partial words.
- Use regular expressions in search**
Check this if you want to use regular expressions in your search.

Important: Because the Replace option modifies the data directly in the database, you should always make a backup before using this tool.

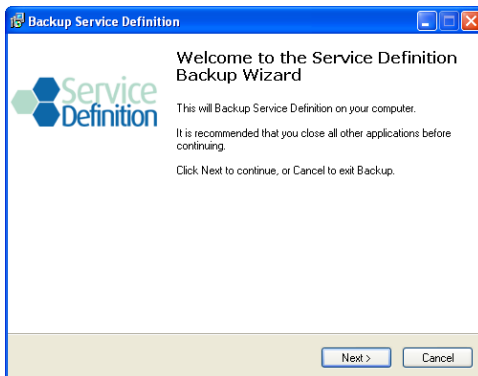
To search and replace a word or phrase in Service Definition, follow these steps:

1. Log in as Administrator and click on the **Advanced Search** link in the Administration menu.
2. Write the word or phrase in the **Step 1: Search for** field and click on the Search button.
3. Scroll to the bottom of the page to see the results of your search.
4. You can refine your search by using the **Search Options**. For example, you can make the search case-sensitive or only find occurrences where a specific text comes before or after the word.
5. Once you have refined your search and you are sure that you want to replace the words in all of the occurrences that appear in the Search Results section, you can use the **Step 2: Replace with** field. When you click on the **Replace** button, all of the occurrences identified in the Results section will be replaced.

7. BACKING UP AND RESTORING YOUR DATA

How to back up your Service Definition installation

To make a full backup of your Service Desk installation, run the application **backup.exe** located in the Service Definition\Backup directory and follow the instructions that appear on the screen.



The resulting backup file will be saved to the same directory, and should be copied elsewhere (to another computer, CD, etc.) for maximum security. This file contains all the necessary data to restore your system, including the contents of the Files Folder.

How to schedule automatic backups

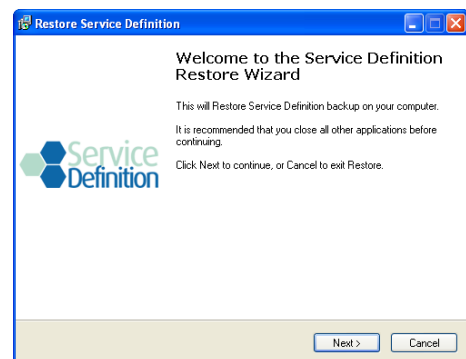
A Windows task may be scheduled to run the Backup application periodically. To automate the backup task, run the **backup.exe** application with the **Backup/verysilent** switch.

If you make backups frequently, you should check the space available on the disk.

How to restore a backup copy

To restore a backup copy from the Backup file, run the application **restore.exe** (located in the Backup directory) and follow the instructions on the screen.

Note that when you use the Restore utility, it places the backed up files to the Files directory, overwriting any files that have the same name and leaving intact the rest. If you only want the Files Directory to contain only the files that are relevant to the installation you are restoring, you should delete (or move) the existing files from the Files Directory before restoring.



Important: When you restore a backup, your current data will be lost. Before restoring a backup file, it's always a good idea to make a new backup file.

8. CUSTOMIZING THE PRODUCT LOGO AND SPLASH SCREEN

How to replace the product logo with your own image file

You can change the logo that appears on the left upper corner of the product, replacing the Service Definition logo with your own image file.

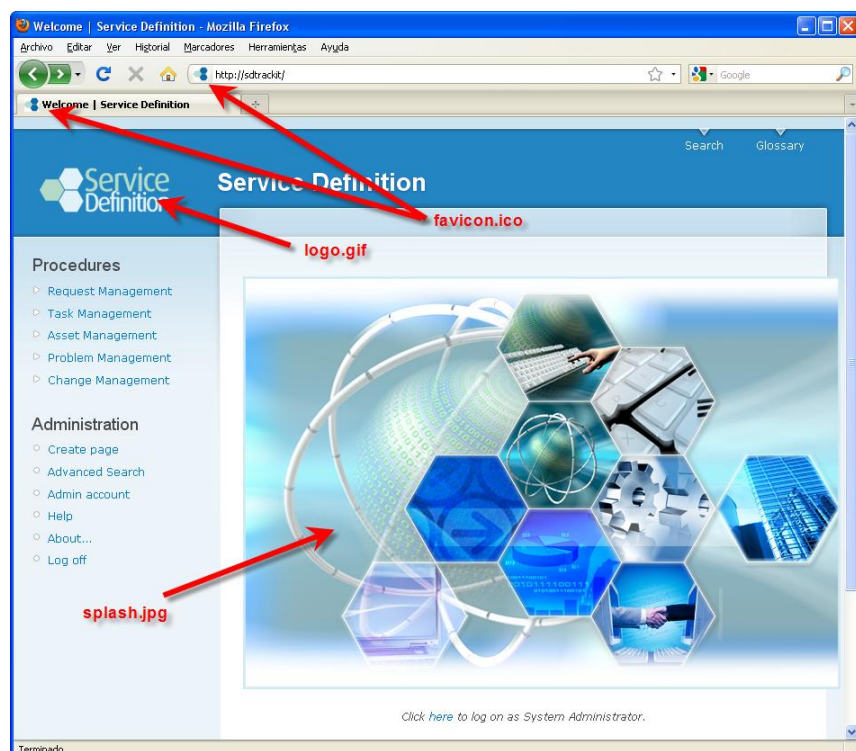
Rename your file to “logo.gif” and upload it to the in the **files** directory, overwriting the original (you might want to make a backup copy of this file first). The image file should be in GIF format and it should have the following dimensions: 165 x 80 pixels. The background color (blue) is #2385c2.

How to replace the Splash image on the welcome page

The graphic image that appears in the product’s main page can also be replaced by your own image. In this case the name of the file is **splash.jpg** and it has the following dimensions: 664 x 459 pixels. This file is located in the Files directory.

How to replace the site shortcut icon (favicon)

The file favicon.ico can be replaced by another file of the same name. This file is located in the Files directory.



9. GETTING TECHNICAL SUPPORT

You can contact the official Service Definition technical support team by email, at support@servicedefinition.com.

When you report a support issue please copy and paste the contents of the **About Service Definition** page, which can be found by clicking on the **About...** link in the Administrator's menu.

It is also helpful to send us a copy of your PHP information. This can be done by clicking on the link in the Help section or by going to <http://server/phpinfo.php> (where "server" is the name of the server where Service Definition is installed).