

MANUAL INSTALLATION GUIDE

HelpConnection.NET v3.5

Table of Contents:

Table of Contents: 2

System Requirements..... 3

Manually Installing HelpConnection.NET on Your Server 3

1. Create Folder..... 3

2. Set Permissions..... 3

3. Add SQL Structure 4

4. Modify Web.Config File..... 4

 Licence Key..... 4

 Database Connection String..... 4

 Set URL..... 5

 Install Path 5

 Language File 5

 Error File 5

 Magic Word..... 6

 How can I find the path on my hosted server? 6

5. Save Web.Config and Upload..... 6

6. Converting Existing HelpDesk Data: 6

7. Admin Menu Settings..... 6

 a) Login to Admin: 6

 b) Important Settings..... 7

 c) For New HelpConnection.NET Installations only..... 7

8. Implementing & Customizing..... 9

Trouble Shooting Guide..... 10

Incorrect Server Path:..... 10

 Need Help ? 11

Welcome to the installation guide for HelpConnection.NET v3.5 software, written by Expinion.net, and released March 26, 2010. Thank you for downloading our product. If you have a *trial* download, please note that it will expire 30 days after your download was taken. If you wish to purchase a license key, you may do so here: <https://www.helpconnection.net/shop/select.aspx>.

HC: The abbreviation *HC* will sometimes be used to indicate the HelpConnection.NET customer support solution.

System Requirements

Windows IIS Server: HC is written in .NET (VB) 2.0. Therefore, you'll need a working Windows IIS server, which is set up to support ASP.NET.

SQL Server: Due to the size of this application, it isn't practical to run it on MS Access. We have designed HC exclusively for use with MS SQL (SQL Server) as the backend. A script is included which will create tables and stored procedures in your existing database. The script will not create your database, but only its structure.

Other: Once the application is installed and online, you can use MS Internet Explorer, Netscape or FireFox (or other modern browser) to administer it.

Manually Installing HelpConnection.NET on Your Server

If you can set write permissions on your server, you probably don't have to do a *manual* installation. Instead, please see the Automated Installation guide. If you wish to manually install and change your web.config file personally, then please continue with this guide.

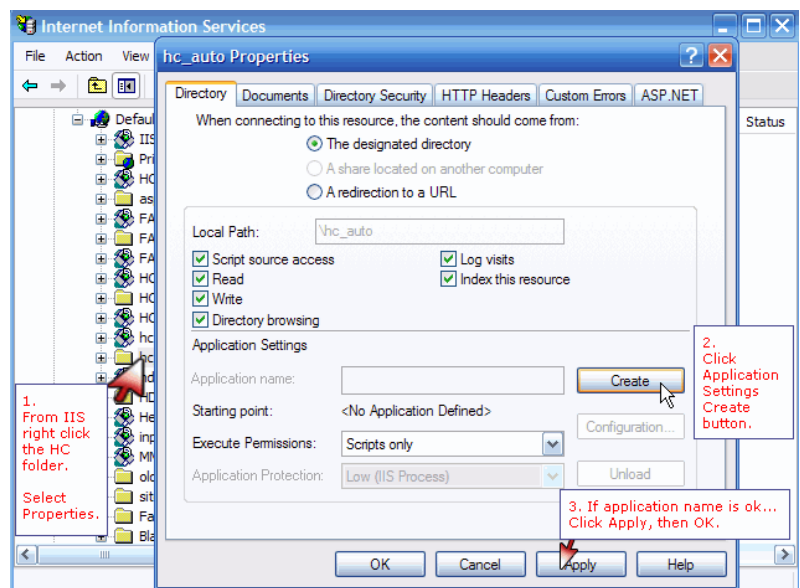
1. Create Folder

Please create a folder to house the HelpConnection solution. (On a typical *local* server, this will be created as a sub-folder of the inetpub/wwwroot/folder.) In a hosted server, this will be anywhere after the folder containing the root of your site.

Unzip the HC_Solution.zip into this new folder. (So your new folder should contain subfolders named *_Languages*, *_PubInclude*, *Admin*, etc.)

2. Set Permissions

Since this is a .NET application, you (or your web host) need to set the folder where the HC resides as a *web application* (see image on right) and assign the typical permissions on the folder. This includes ASP.NET and IUSR accounts (read & write).



3. Add SQL Structure

An executable SQL Server script is included to create the tables and stored procedures for you. You'll need to open your SQL server manager to the appropriate database, copy the DB/SQL_350.sql query, and execute it against your existing database. (If you don't already have a SQL database, then you'll need to create one first through your server manager or host.)

The execution of the script might take a few minutes depending on the server and your connection. Please wait until the script has completed before stopping it.

4. Modify Web.Config File

There are a great many optional settings in HC. Some are found within the admin menus themselves, and others are found within the program/web.config file. Only the *mandatory* settings are covered in this guide. This will be enough to get your application up and running. (Please see the http://www.example.com/hc/_Guides_/WebConfig_Guide.pdf document for more information.)

These settings will need to be modified using a text editor such as Notepad or MS Visual Studio. Please do not use editors such as MS Front Page, which replace certain characters and can corrupt the configuration file.

- Please ensure that all variables containing text (characters or commas, etc.) have *both* quotes when you have finished editing.
- Note the comments (text beginning with a single ') *above* each setting, which contain helpful information.
- Ensure that all paths are changed to match your domain (virtual) and server (physical) paths.

The five mandatory settings will be at the top of the file under a heading that looks like this:

```
<!-- MANDATORY SETTINGS -->
```

Licence Key

The trial or your purchased license key should have been given to you via email.

A trial license includes all features of HelpConnection.NET, but it also has a time limit attached to it. This time limit begins at the time the email is sent. Once expired, a new license key will need to be added before you can continue to use the application. Enter your license key as the value.

```
<add key="LICENSE" value="1-2-3-4-5"/>
```

Database Connection String

The database connection string will look similar to this line below.

```
<add key="ConnectionString" value="Provider=sqloledb;Network
Library=DBMSSOCN;Data Source=IP_or_URL_to_SQL_Server,1433;Initial
Catalog=database_name;User ID=username;Password=password;"/>
```

The underscored portions shown in red will need to be changed to match *your* SQL server location. Port 1433 is the typical default, but it may be different in your scenario.

Example: ...*Data Source=127.0.0.1,1433;Initial...*

If unknown, please contact your DB admin or web host to find out the exact connection string you need to use. Unfortunately, we have no way to know the unique connection for your database.

If you are an Expinion HelpDesk 6 user (with SQL backend), you may find that your previous helpdesk config.asp file database connection string will help you.

Set URL

The full URL key will look similar to the line below.

```
<add key="FULL_URL" value="http://www.example.com/HC/" />
```

You will need to change the portion in red to reflect your site. If you have your own server, and you have installed the application in the wwwroot folder, the url will typically begin http://localhost/hc/. (Be sure to enter the last slash on the end.)

Install Path

The path should look similar to the line below.

```
<add key="InstallPath" value="C:\Inetpub\wwwroot\HC\" />
```

You will be installing at some point after your wwwroot folder, but the path is dependent on your drive designation and the name of the folder where you placed HC. Use a / at the end of the root folder of the HC installation. Knowing the physical path can be difficult when you are remotely hosted, [[read about finding the physical path.](#)]

Language File

To allow for future language translations, visible English text is contained in a file named en.xml. If you make your own translation, you can change the path to the newly translated (and renamed) language file here.

```
<add key="LanguageFile" value="C:\Inetpub\wwwroot\HC\_Languages\en.xml" />
```

Usually, you will only have to change the portion shown here in red. Note that this is the *physical path*, and *not* a URL.

Error File

The path to the error file also needs to be set. As with the language file, note that the system is looking for a *physical path*, and not a URL. Note that this file needs Read & Write permissions.

```
<add key="ERROR_FILE_PATH" value="C:\Inetpub\wwwroot\HC\error.txt" />
```

Magic Word

This is a unique set of 5 to 20 letter and/or numbers that are used by HC to improve the security of the HC.NET solution. Make sure to change this from the default value.

```
<add key="MAGIC_WORD" value="AA1223AFLFGJ555QQ9"/>
```

How can I find the path on my hosted server?

To determine the correct server path, try running the `http://www.yoursite.com/hc/_Tools_/Setup/setup.asp` utility in your browser. (Read about using this utility [here](#).)

Or, contact your host for the physical path to your HC folder.

5. Save Web.Config and Upload


You're now finished the essential portions of the web.config file. Save it, close your editor, and if you are using a remote server, upload the new file.

6. Converting Existing HelpDesk Data:

A tool to migrate most of your data from Expinion Help Desk 6.3 to the HC solution is included. If you will be transferring data, you need to do this on a *fresh* HC installation that has no data yet. (Existing HC data will be lost.)

Please see the Data Migration Tool guide (`_Tools_\DMT` folder) for more information.

7. Admin Menu Settings

Whether or not you converted your data from a previous Expinion HelpDesk installation, you will have to login to the admin and check some settings. While in the admin area, note the help text that is located above the footer. You will also find some specific help texts after clicking on  icons that look like a blue circle with a white "i" inside.

a) Login to Admin:

The typical login area is: `http://www.example.com/hc/admin/index.aspx` .
The default username is Admin; the default password is Admin1.

Both username and password are case sensitive.

If you've completed the data conversion from HelpDesk 6.3, then your admin username and password should be the same as they were in your HelpDesk installation.

Each agent may select between two possible ways of displaying the top tabs. To change the way the tabs appear by clicking on the *Home* tab, then on *Update My Profile*. (Look for the *Tabs Format* selection.)

b) Important Settings

Application Settings

To access some additional settings that will be used to customize your HC, click on:

- *System tab*
- *Application Settings*

The settings found here are all *system wide*, and will affect the entire application and all users. If this is a new installation, you may want to use the < Suggest Settings > link.

The folders that you want to use for uploading files (admin & public sides), or for uploading files will *need* to be write enabled before they can be used. If you will be using the same folders as you did in a previous HelpDesk installation, they should already be write-enabled. (Be careful not to delete the folders later though.) Make sure to set Read & Write permission on the folders.

Email Message Templates

Email address, authentication and SMPT info was already set in the *application settings* step above. You can get *started* populating your email messages by clicking on the [Apply Default System Templates](#) button near the bottom of the page. However, at some point these messages should be customized to your preferences. You should also verify your URL where contained in the message. (You may have to use the scrollbar to see the entire message.)

c) For New HelpConnection.NET Installations only...

If you have converted data from an old HelpDesk 6.3 installation, then you shouldn't need to change the agents or categories to make your new HC usable. (This info, as well as issue info should have been carried over. Please verify this before deleting the old database or any of the tables. We cannot *guarantee* that all data will be converted.)

Agents

Depending on your Tabs Format setting, the *Agents* area will be found either directly from an *Agents* tab, or from a sub-tab after clicking on the *Contacts* tab,

Add a profile (Add New Agent) that would reflect you, the only security level is *Administrator* by default. This can't be deleted, as at least *one* agent should have access to *all* functions and features of HelpConnection.NET.

Once you've added your own profile, we recommend deleting the default agent Admin, as the default username and password is the same for every copy installed by our customers. (Avoid others fraudulently logging into your system. To do this, click on the delete (✗) icon next to the admin profile, if you have another admin agent added.)

Log out of the HelpConnection.NET administration (logout button on bottom of all pages) and log back in using your newly set-up profile.

Categories

Categories are used as headings to sort issues/questions. Categories are also used to determine which agents will be notified when a new issue has been submitted. (Unless an application

setting, client setting or POP3 setting overrides this, any agents who is assigned to the category that the issue is submitted under, will receive an emailed notification. The first available agent will then *Claim* the issue.)

Depending on your Tabs Format setting, the *Categories* area will be found either directly from the *Categories* tab, or from a sub-tab after clicking on the *Issues* tab.

At least one category must be added (Add New Categories button) in order for the HC to function properly. Category names can be edited later, and further categories added; there is no need for the names to be perfect on the first try!

Security Levels

If any agents should *not* have access to certain features of *HC*, you may want to establish some additional security levels with some restrictions. (Example: Can't delete any issues.)

To do this:

1. Click on the *Tools Tab*, then on *Security Levels*; then on *Add New Security Level*.
2. Name the security level either after a group of agents who will use the security, or a feature of the security. Examples: *Accounting* or *Fred* or *Junior Agent*.
3. Select which features this agent *should* be able to perform.
(Note: Access to tabs *only*, is for *view only* rights.)
4. Select the *order*. (This is the *order* in which *security levels* will be displayed in your multiple-choice menu.)
5. Click *Add Level* button.

Add Knowledgebase Issues:

You may wish to add some issues to get your Knowledge Base started. Previous HelpDesk 6 by Expinion.net users will find this process almost identical. Basically, any finished issue that has the *public* box checked, will be visible in the public side KB. Use the Add Quick Issue for the fastest KB additions.

See your [Admin Guide](#) for detailed instructions.

See Admin Guide *Getting Started*:

More Information that isn't *essential* to the very initial setup of your HC solution can be found in the Admin Guide, *Getting Started* section. This includes links to information such as adding/importing basic client info, setting up your POP3 utility, adding news articles.

8. Implementing & Customizing

Your application installation is basically done! Once you are satisfied with the software, you will want to implement the HC by completing these last items.

Language Translations:

HelpConnection.NET has been designed with the *majority* of visible text contained in one file. You can find this en.xml file in the *_Languages* folder. If you translate this file into a different language, then you should copy and rename the file before beginning the new translation. Later, you can identify the default language file to be used, in the web.config file mandatory settings.

Note: If translating the language file, use the language editor found in the *_Tools_LFE* folder. Also, files in HC.net may be cached, so your changes may not appear immediately. (The change may not appear for as long as 20 minutes.)

Customizing the Public Side *Look*:

HelpConnection.NET is designed with one header and one footer file for the entire public side. So, you can *include* your site's menu by simply adding one include statement into each of these

files (if *your* menus are *also* designed to be in a separate file). Otherwise you'll need to paste the code into the top of each of these two files. Read similar [KB issue](#).

From the HelpConnection.NET program root folder, look for these two files: `_PubInclude/inc_header.ascx` and `_PubInclude/inc_footer.ascx`.

Additional fonts, colors, etc. can be changed in the `_PubInclude/styles.css`.

Link Your Site:

Once you successfully go through the above, you can put a link from other pages on your site, to your new *HC.Net solution*! Then you can add issues that you anticipate, and/or receive support issues/questions from your visitors. (Note: Use the [Add Quick Issue] button for faster KB populating, being sure to select *Public* in the *Availability field*.)

Print or save a copy of the [Admin Guide](#) onto your PC. This will answer most questions you may have as an administrator of HelpConnection.NET.

Incoming Email to Ticket Conversion:

Once you have finished setting up your HC, and your outgoing emails are working well, you may wish to set up this feature. To do this, please reference:

1. The *Systems tab*, POP3 Accounts Setup manager portion of your [admin guide](#).
2. The [HelpConnection.NET Scheduler Guide](#), for instruction about adding a utility to automatically schedule the transfers.

Trouble Shooting Guide

Incorrect Server Path:

When setting up your web.config file, you may not know the physical path to the newly uploaded error.txt or `_languages/en.xml` files. (These have been included here in case you want to use your own custom language file or error text. And, since this info needs to be known to run the admin, then you can't really set it up in the application settings area.)

To find the correct path, either ask your host or try running this [[Setup.asp Tool](#)], which is included with your download.

Getting Errors? [[Installation Knowledge Base](#)]

Need Help ?

Additional *System Wide* settings [[Web Config Guide](#)].

How to Info [[Admin Guide](#)] [[How To Knowledge Base](#)] [[Learning Center](#)] [[Forum](#)]

Other Guides [[Guides Links](#)]

Or visit us at <http://www.helpconnection.net/support/> to ask questions.