

## HelpConnection.NET Scheduler Setup & Use

For *Automated* Incoming Email to Issue Transfers

Once correctly set up, the HelpConnection.NET solution can convert incoming emails into tickets (issues). However, despite the ability to *transfer* emails, the HC solution cannot *schedule* these transfers alone.

The *HC Scheduler* (included with your HC download) can be used to schedule regular checks for incoming emails and if there are any, their transfer.

*This guide* will explain the installation and setup of the *HC Scheduling Utility* that *can* be run from a PC. The PC based utility is *not* required. You may prefer to run transfers manually from the HelpConnection.NET admin.

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Many of our clients run the HelpConnection.NET (HC) in a shared hosted environment access to Windows Scheduler is often very difficult to obtain and in most case is simply not available.

After installing this utility, a URL is provided for your use with Windows Scheduler, if this is your preference. However, we do not support *Windows Scheduler* itself, nor do we support *any* software that is provided by a third party.

The utility, sometimes also called HC Desktop Agent, is located under Tools \HC Scheduler Setup folder. You will need to install it and run it on any PC in order to achieve regular mail pickup. As long as you configure and enable this utility, and as long as the PC is running and connected to the Internet, emails will be transferred from the mail server to your Help Connection.NET solution automatically.

### Requirements:


The HelpConnection.NET Scheduler (Desktop Agent) requires a Windows based PC, Internet connectivity and .NET 2.0 framework. It has been proven to work on Windows XP and Windows 2000, and should work on the Vista OS as well. If you have another OS please let us know how it's working out for you.

Note: The PC Notification Agent can only run when the hardware is working. In order to get 24/7/365 coverage you may wish to install the utility on more than one PC, that are both running the majority of time.

If you have your *own* server, and your IIS is installed on a PC that has one of the operating systems described above, the PC utility may be installed on this same machine. (Provided that your server admin will allow this installation.)

### Installation:

From your unzipped download, open the Tools \HC Scheduler Setup folder. Double click the Setup.exe icon (box with a CD image). Confirm that you wish to *Run* the program.

After a very short installation, you should now have a new  icon in your desktop toolbar, which will show a tooltip as follows (when your mouse is over the icon).


Desktop Agent for HelpConnection Solution by HelpConnection.net

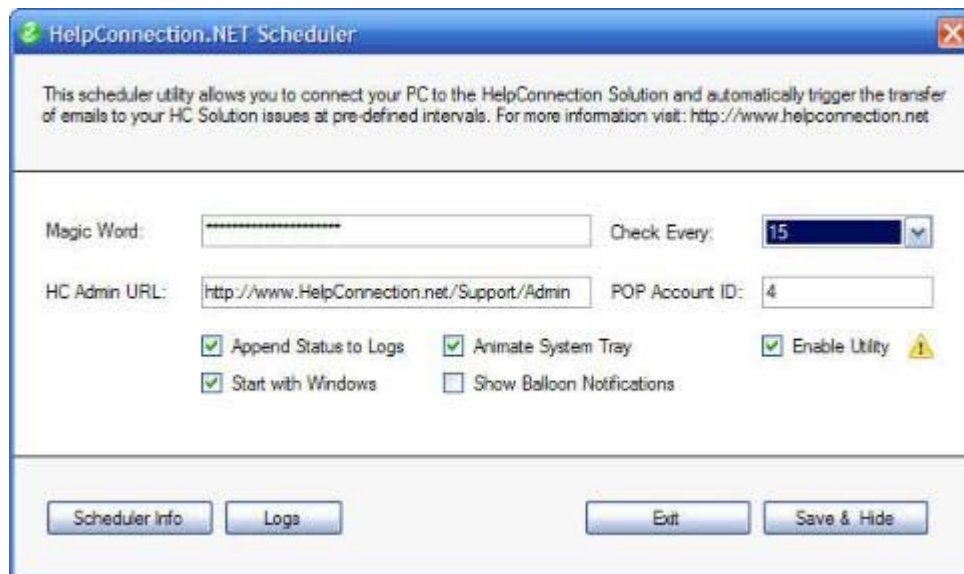
## Usage & Configuration:

Now that the HC.NET Scheduler is successfully installed on this PC, you will need to configure it according to your HC.NET installation. Each PC can have only one HC Scheduler installed.

Hint: Each agent can install a separate scheduler on his/her own PC, which can transfer their unique email address (if setup in the HC.NET admin, tools, POP3 area).

## Configuration

Double click the  icon in the Windows toolbar. A window will show up allowing you to configure the utility. While this window is open the icon you have just double clicked will disappear. It will appear again once the *Save and Hide* button is pressed<sup>1</sup>.



The window allows you to set the location and settings of your HC.NET installation. Please make sure to configure it exactly as instructed.

**\* The utility won't actually *run* unless the *Enable Utility* box is checked!**

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<sup>1</sup> If you still want the Notification Agent to check for messages, do *not* use the Exit button (this will close the utility and stop it from checking for emails.) For the emails to be checked the *Enable Utility* box must be checked and you must leave the Notification Agent by clicking on the *Save & Hide* button.

## Magic Word

This must match the *Magic Word* as defined in the web.config file. The line you're looking for will look something like this:

```
<add key="MAGIC_WORD" value="QBC29GFkFGJ112345C9" />
```

Paste in the portion found after the word value, and between the quotes. (As shown here in green.)

## Check Every

This is where you define how *often* the HC Notification Agent will visit the mail server and check for new messages. All values are in minutes. Recommended value for shared hosting is 15 minutes or more. If more than one PC has this scheduler pointing to the same POP3 ID (email address), all installations that are currently online will be checking for emails. (This can put an unnecessary strain on the email server.)

## HD Admin URL

This is the URL of your HC solution admin folder. For example it can be something like: <http://www.Example.com/HC/Admin/>. Make sure it's the URL to your HelpConnection administration and not just your domain URL.

## POP Account ID

The POP account ID value is the POP account you have created under HC > Admin > Tools > POP. Look at the index listing and enter the ID value of the account you want to be checked by the utility.





ID	NAME	POP3 SERVER
1	POP3	mail.helpconnections.net
2	Newsletters (bhd)	mail.infosaic.com
4	HelpConnection.NET Support	mail.helpconnection.net

Enter the desired account ID value to the POP Account ID field.

## Append Status to Logs

Check this option to keep logs of the activity the utility has performed. View the logs, via the [Logs button](#) below.

## Animate System Tray

When this option is checked the  icon next to your Windows clock in the right hand corner will change to this  icon when the transfer of messages from your mail server to HC issues is in progress. The icon will switch back to the original image once finished.


### **Enable Utility**

This option must be checked in order for the utility to function. When this option is not checked the utility will not attempt to go to your mail server and transfer the messages. Make sure this is checked if you want to use the utility.

### **Start With Windows**

When this option is checked the utility will be automatically started each time you start Windows. Recommended setting is checked.

### **Show Balloon Notifications**


Check this option to cause the utility to show a tooltip balloon above the  icon next to your Windows clock in the right hand corner, when the transfer of messages from your mail server to HC issues is in progress.

### **Logs (button)**

Logs, if enabled via the *Append Status to Logs* checkbox above, clicking this button will show successful issue transfers, and/or any error messages.

Hint: To clean out your logs, you can simply open the logs with this button. Then delete the older entries and save the log (File/Save) and close the window.

### **Save & Hide (button)**

This button will save the settings and will hide the window back to your system tray and again enable the  icon next to your Windows clock in the right hand corner. This is also the default start position of the utility. If you want to continue running the utility after checking or changing a setting in your *Notification Agent*, use this button.

### **Exit (button)**

When you press the Exit button the application will be exited and terminated. No more emails will be transferred by *this* utility until it has been started again.

## Troubleshooting the PC Utility:


### The utility doesn't seem to work! What now?

First of all make sure that the utility has the *Enable Utility* box checked by clicking on the green Notification Agent icon.

If the icon isn't there at all, you've probably *Exited* rather than pressed *Save & Hide*. [Turn PC Utility back on](#). Or you can restart (logout from Windows and then back in). The PC scheduler icon should return on its own.

### Still trouble?

#### Check the logs to see what's going wrong.

1. Click the  icon to see the Scheduler settings and options.
2. Click the *Logs* button.
3. Review the logs and correct the problem according to the log entry. (Note that some problems may be due to incorrect settings in the admin POP3 Server Manager settings.)

In most cases the utility will fail because of an incorrect account ID value, and incorrect *Magic Word*, or even the HC Admin URL; make sure all those are correct. If you're *still* having trouble, you should check the settings in the *HD Admin, Tools tab, POP3 Server Manager* that you setup. (You may also want to try verifying these settings by *manually* transferring emails from this utility to see if it works from here.)

\* Note: Certain other PC utilities may affect your PC Notification Agent. For example, if you have a utility running on your PC that temporarily stops the clock on your desktop from being updated, your HC Notification Agent will also *not* check for emails until the clock has been freed again.

This can be the case with different PC utilities such as some screen saver programs.

## Frequently Asked Questions:

### **It's asking for Internet access and my Firewall is warning me. What now ?**

Yes, that would be the case with almost every firewall. You need to allow the utility to access the Internet as it needs to check for the mail. Make sure your firewall allows the HC notification Agent free access to the Internet.

### **I've *exited* the Notification Agent. How do I turn it back on?**

In this case you'll have to click on:

- Your Windows *Start* button
- *All Programs*
- *HelpConnection.NET*
- *HC Desktop Agent*

### **It's nice, but I don't want to use it. How can I uninstall it?**

You can uninstall the *Scheduler* via the Add & Remove Programs utility, from within your PC Control Panel.

To remove the software, click on:

- Start Button
- Settings
- Control Panel
- Add or Remove Programs.
- Then on the list of applications locate the *HC Desktop Agent* and press the Change/Remove button.

### **How can I get the PC Utility to run by itself, without me having to remember to turn it on?**

Click on the  icon. Check the 'Start with Windows' button. Save & Hide.

### **Can I have *more than one* PC Scheduler running at once?**

Yes, but only on *different* PCs. The notification agent has been designed to have only one notification agent running per PC.

Hint: If you have your *own* server which runs 24/7/365, then install the PC scheduler on your server. Set this one up to check for the *most important* email address (POP3 Account ID). Usually this would be whichever email address you advertise to clients as the *Support* email address.

### **Additional References:**

If the other guides ([Admin](#), Manual [Installation](#) and [Custom Settings](#)) that came with your download don't answer all your questions, there are still a few more resources you can try.

HelpConnection.NET Knowledgebase / Help Desk (Ask Question):  
<http://www.helpconnection.net/support/>