

AUTOMATIC INSTALLATION GUIDE

For HelpConnection.NET v3.5

Thank you for downloading the HelpConnection.NET solution.

While this customer support application is quite large and feature packed, we hope you will be able to use this utility to make the basic installation as easy as possible. (You will likely want to fine tune features to your needs later via the admin area settings or the web.config file. But the essential settings can be handled from this utility.)

This utility is intended for typical localhost (intranet) installations on your own IIS server. If you have shared hosting, or if this process doesn't work for you (non-typical server setup), please see the *Manual Installation Guide* that was included in your download (HC Setup\Manual folder).

Notes:

1. To complete this installation, you will need your license key, which is provided from HelpConnection.NET via email along with the download link.
2. Database: The setup utility will present you with a checkbox where you can check the 'Create Database Structure' checkbox. This will create a *new* database named HC_SOLUTION and the structure for you.

Uncheck the 'Create Database Structure' checkbox in the automatic install utility and manually create or upgrade the database using SQL Server Management Studio or a similar tool, if you are...

- a) upgrading from a previous version of HC. In that case see the Upgrade guide. (Manually execute *upgrade* query based on your existing version.)

or,

- b) using an existing database that is not named HC_Solution. (Manually execute the `_Tools_/DB/SQL_350_.sql` script.)

Semi-Automated Installation:

1. In your inetpub/wwwroot folder, create a folder to house your new HelpConnection.NET solution. (You can choose any folder name that you prefer.)

Later, when accessing the application, your browser will be addressed as follows, with your new folder name replacing the red text below.

<http://localhost/YourFolderName/hcbase/index.aspx> for the public side.

<http://localhost/YourFolderName/admin/index.aspx> for the admin side (customer service reps).

You may wish to choose a short folder name such as HC, help or Support.

2. Unzip your downloaded file. (This doesn't have to be in any specific folder, the setup utility will later ask for the application path, copy the files for you and set permissions.)
3. Locate the HC Setup folder (found within the HC Setup\Automatic... folder).
4. Click on the setup.exe file. (You will have to verify that you wish to run it.)
5. Use the *Next* button to move between screens, completing or changing each field as you go. Read the text on your setup utility for help.

SQL Server Username: In most cases the *default* is: *sa* . If you don't know the username, try "sa". Then be sure to click the 'Test Connection' button before continuing. If the test connection doesn't work, then you must find the

correct SQL username, password, and connection before continuing.

6. The URLs to reach your newly installed application will be provided for you on your last screen.

The *default* login for your HelpConnection.NET solution admin area, will be username: **Admin** and password: **Admin1** (case sensitive).

Settings:

Your installation is complete, but you need to make a few settings in the *Application Settings* portion of the admin. <http://localhost/HC/Admin/Settings/index.aspx>.

Note: Change these paths to match your server name, site, and HC folder name.

More information about these settings may be found in the [Manual Installation Guide](#), and the [Admin Guide](#).

If you plan to transfer data from a previous Expinion HelpDesk v6.3 (or later) installation, you should do so now. (Any data you add now to issues, agents, or categories will be overwritten with the data transfer.) See the [DMT Guide](#) for information about doing a data transfer.

If you don't plan on transferring data, then you'll need to setup a few categories and agents before adding any issues.

Common Errors:

Don't forget that to run .NET, your server must be running the ASP.NET SESSION STATE service (unless you are using IIS 7). Provided is a bat file that will start this service for you, it can be found in the `_tools_` folder. (It would be a good idea to put this command into your start up, since it will need to be restarted any time your server is taken down. Or simply go to Control Panel > Admin Tools > Services and change the service to run at automatically at start up.)

If you receive the error below, after clicking on your new HelpConnection.NET solution link:

Server Error in '/' Application.

...

To fix this, try going into your IIS area, locate your HelpConnection folder, right click, Properties, "Remove" the application name related to HC, and "Create" it again.

[[Other common installation errors.](#)]

More Help:

For additional information about setting up and implementing your HC solution, please see the [Manual Installation Guide](#) and [Web.Config guide](#), which were also included in your download.

For information about using the HelpConnection.NET solution as an admin agent (customer support rep), please see the [Admin Guide](#).

For information about transferring existing *Expinion.net* HelpDesk data to your new HC solution using the *Data Migration Tool*, see the Tools folder in your download, [DMT Guide](#).

To *Schedule* the transfer of incoming emails into tickets, you must first setup the POP3 Account (according to the Admin Guide (Systems tab, POP3 Account Setup). Then you can install the scheduling utility to one or more PCs by following the instructions in the [Scheduler Guide](#).

Additional help text is available online from the footer of your own installation. (If you don't see any help text with a pale yellow background, then click on the Home tab, Update Profile link, and add a check in the *Dynamic Help* checkbox.

Or, visit our knowledgebase at <http://www.helpconnection.net/support/>.

Or, visit our Learning Center at: <http://www.helpconnection.net/videos/learning/>.

Be sure to upload the [Admin Guide](#), which is included in your `_Guides_` folder.

Support:

Each HelpConnection.NET *purchase* includes support for the first three months after purchase. When *purchased*, a free installation can be done by HC.net staff (if you can provide us with temporary FTP access and remote access to your SQL server).

Additional support can purchase here:

<https://www.helpconnection.net/shop/select.aspx>

You can ask your questions about HC.NET here:

<http://www.helpconnection.net/support/>