Web+Center
Getting Started Guide

Web+Center Version 6.0

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Introduction:

This Getting Started document will help Web+Center configurators step thru additional configuration steps that occur AFTER the initial installation is completed. Please complete the installation by following the steps in the Installation guide first. It is important all of the options be reviewed in this guide even if you are not going to use all of the options. This guide is designed to help supplement the other documentation (User Guide, Installation Guide and Training materials). Those other documents should still be referenced for daily operational issues.

Step 1: Install the product and related components

Install the product if you have not done so already. Refer to the Installation Guide (Installguide.htm or Installguide.doc in the webcenter documentation directory) for complete instructions on how to install and perform basic configuration.

Step 2: Verify SMTP email information is configured and perform other system configurations

Before any email notifications can be sent from the Web+Center application, the STMP host address, reply to email, optional SMTP authentication information must be configured into the system. Please confirm these settings by clicking the **Administration** … **System Configuration menu** …**System Configuration Options** link. To access these buttons, you must log into Tech+Center with a "configurator" level password.

It is important you get the Email notification portion of the application running to make complete use of the entire Web+Center product.

On the **Configuration Options** form, set or change the following fields from the default values:

(1) SMTP Mail Server address contains either the IP or valid host name for your outgoing mail server and configured any SMTP authentication information if needed.
(2) Change the default reply-to-address to an valid email address like: support@mycompany.com
(3) Configure your Organization From Name (i.e. Company name or organization name)
(4) If you don't plan on implementing the Asset Management component right away, uncheck the Enable Assets database checkbox.
(5) Press the Submit button to process these changes.
(6) Click the Cancel Screen once these changes have been submitted.

Step 3: Configure your category lists

One of the most important steps to creating a useful database is to create case categories. It is better to only create a few important category lists (2-4) otherwise customers and techs often will not take the time to complete more category selections if there are too many categories.

Carefully think about the types of cases that your support organization is going to process and what simple category definitions would help expedite the case processing without defining the problem too much. Creating too many categories will cause both the techs and the customers to not answer the category questions, making them useless.

You may start off with a broad category like "Type of Problem" with sub categories of: Problem Report, Question, Comment, Work Request, etc.

More detailed categories then could follow like "Computer Platform" of Windows 95, Windows 98, MAC, UNIX, etc.

For internal help desks you might include categories for room, building or campus. Some clients configure one of the categories as Time Spent and each time the case is reviewed, the Tech will update this category with the total time spent.

To configure your categories, first modify the two existing categories with your own category lists. To edit the category lists, click the **Administration** button, **System Configuration** menu link and the **Manage Category Lists** link.

Select one of the default categories to edit and replace the category name and categories with your own category values that are best suited for your organization.

Selected category lists can be enabled for the technicians view only and are hidden from customer views. A category list that defines how much time was spent on a case might be appropriate to hide from the customer but let the techs view and set this category.

Step 4: Enter your support staff into the Tech Staff database

The system is installed with (2) default tech staff members to show the different levels of Tech+Center security permissions. You must edit and replace these existing tech staff accounts with your own Tech staff users information or delete some and add new techs into the database. If you want to add more than 2 techs to your support center, you must purchase a license key from Internet Software Sciences. If you want to evaluate the system with more than (2) techs, please contact Internet Software Sciences for an evaluation license key for additional techs.

To help inserting tech staff information into the database, you should obtain the following information for each tech you want inserted into the database.

Name
Phone Number
Email Address
Preferred Login ID and password
Any special notes your want to include about the person (ie UNIX, networking expert, etc)
Security Level – Choose from "Configurator", "Administrator", "Dispatcher", "Tech Read/Write" and "Tech Read Only".

To add or edit tech staff into your database, click the **Administration** button, and press the **Edit Staff Member** button **(or create staff member)** link. For each tech, enter at least the following fields:

First and Last Name
Work E-Mail (Required for notifications)
LoginID
Password

Security Level

Select a tech or create a new tech record. These default tech accounts are only meant to help you start using the application, and you can create any level of tech up to the licensed number of techs for your system. Refer to the user guide for additional information on the security levels.

Step 5: Create your support organization groups

One of the most powerful features of Web+Center is the ability to configure support groups within your organization. Cases can be assigned to a Group or optionally to a "tech". This allows for flexible case processing and assignment. The default system database comes with 5 Groups (Default Support Group, Engineering, Marketing, Purchasing/shipping and Sales). You can delete, add or rename these groups as necessary. There must be at least one group configured and one group must be defined as the "Default" group where cases are initially assigned by default. Refer to the Organizational Model in the User Guide for more information on Groups.

To add, delete or rename "Groups", click the **Administration** button, and press the **Create support Group, Delete support Group, Rename support group or change default support group** links**.**

Step 6: Configure techs into the various support groups

Once the groups are configured, you can place the techs into one or more groups. To add techs into the support groups, click the **Administration** button, and press the **Add staff member to support group** link**.** To help configure group changes or view your group configurations, the links **Show staff members by group, remove staff members by group and re-assign all cases from one support group to another** will help to make these tasks easy. Many of these functions support multiple form selection as well allowing you to select and change more than one staff member at a time.

Step 7: Set up Group email notification preferences

Once the techs and groups are configured, one can configure which techs are to receive automatic email notifications when a case is first assigned to that group or an update is made by the customer.

You must FIRST place the tech into the support group and then go back to the Edit Staff Member page and there will be options now to enable/disable group level email notifications.

Each tech can be configured with two email notification addresses. The work email address is the address where the full notification email is sent with all of the case information and customer information. A second, optional cell email notification address can be specified under the home information field. A very short cell email notification message will be sent to this address if it is specified. To turn this notification off, simply remove the email address from that field.

If you have a Tech+Center user who does not frequently log into the Tech+Center application, you may want to set up group notification for that tech. This can be done by clicking the **Administration** button, and press the **Edit Staff Member.** Near the bottom of the Staff Member Information form will list all of the associated groups for this staff member. If you want this staff member to get email notification when cases are assigned to this group, select the "**Notify by email if a case is assigned to this group**" checkbox.

You can also configure whether to receive an email if the case is assigned to a selected tech. This will also send out an email to the tech when the case is updated by the customer.

If Web+Center is being configured for a small organization where no one constantly reviews and dispatches support cases, it is desirable to configure at least one tech to be a member of the default support group. This will send email notifications when any case is submitted by the Customer+Center interface.

Step 8: Customize the automatic email notification messages

Web+Center sends out automatic email notifications to techs or customers when:

Customers Register
Customers create or update a support case
Customers search for a lost Login ID and password

Tech create or updates a support case
Tech registers a customer

The email message that is sent out has a configurable part of the message and a fixed format part of the message. We recommend that you mention that people should not reply to this email and ask them to use the web-based interface to update any new information about their case.

You can edit the configurable part of the notification emails by clicking the **Administration** button, and the **Edit Userpage and email messages** link.

Edit the text area boxes label (2) – (5) with information that is appropriate. For example, the following may be appropriate for an internal Help Desk organization.

Thank you for contacting the Elm Valley College Support Desk.
Our support hours are: 8:00 to 5:30 PM Mon-Fri
Emergency telephone contacts are at (444) 444-4444

Please do not reply to this email message. If you wish to update your support case,
Please login in and update your support case through the Customer+Center page.

Thank you,
James Dean
Director of Information Technology

… Fixed portion will follow.

Step 9: Decide on an initial group assignment and routing approach

There are two options to handle how new cases that are created by the customer (or the tech) are initially dispatched into a group queue. Decide which is the best for your organizational process.

Approach 1 – All new cases are assigned to the Tech group which has been defined as the "default group". To dispatch these cases to other groups to down to techs, a dispatcher will be viewing open cases for this default group and as they come in, the dispatcher can dispatch to the available tech and group as needed.

Approach 2 – All new cases can also be directly assigned to various groups based on a category item selection with one category list. This option can be configured by clicking on **Administration… System Configuration Menu, Configure Initial Group Assignments.**

Step 10: Create a generic Knowledge Base customer

There are times when the problem or solution does not have a customer to attach it to or maybe the case is being opened by the Tech directly so that information can be placed into the knowledge base.

It is desirable to create a “Generic Customer” for which to create cases where there is no customer to attach the case to. Cases cannot be created without assigning it to a customer. We typically create a customer with the Last name of Knowledge and the First name of Base that creates a customerID called Knowledge_Base. Techs can easily find and use this customer account when adding cases to the system that do not have a customer for the case.

Step 11: Customize the Customer+Center with your own graphics and navigation bar or image maps

The Customer+Center application is designed to be totally integrated with your existing website. You can easily integrate your website banner, and top, side and footer navigation by editing the **ccheader.inc** and **ccfooter.inc** ASP include files located in the customercenter directory within the Web+Center installation. Any of the graphics used in the Customer+Center or Tech+Center applications can also be replaced by graphics that have similar size and name by simply creating them and replace the existing graphics located in either the customercenter or techcenter directories.

You can also customize the starting Customer+Center page by editing the **default.asp** file in the customercenter directory. If you do not want self registration, you can comment out this feature or remove the HTML code from the default.asp page by using an ASCII editor. The Internet Software Sciences Consulting Group also offers programming services to help develop custom additions or changes to the Web+Center application.

Do NOT use a HTML editor on any of the HTML or ASP modules to make changes and you should use a plain ASCII text editor like Notepad or we recommend Textpad from www.textpad.com. This plain text editor has many search and replace features and also has line numbers which is helpful for debugging ASP VB scripts.

Step 12: Create a database backup and recovery plan and mirror/test site

No customer support system should go production status until a database backup and recovery plans have been created. With an Access database implementation, you simply need to save the webcenter database MS Access file and the Web+Center application directories. With a SQL*Server implementation, use one of the backup mechanisms provided with SQL*Server. You should also create a complete backup of your existing webcenter installation directory in case you made any customizations to the ASP modules, graphics or HTML pages.

Almost all problems that we have encountered with the application can be solved by rebooting the server. Other problems may occur when the database is updated outside of the web based application and the table information is not in a format that is consistent with the database structures set up for the program. To recover from these errors, a previous version of the database would help to evaluate the differences.

If you plan on performing Web+Center customizations, we recommend you create a test Web+Center site in addition to your production site for testing of new upgrades and script modifications. This second Web+Center site could also be used as an immediate recovery site in the event that the primary production site is down.

Step 13: Calling an optional One-Step-Ticket Approach for Customers

If your system is to be used in a situation where you want customers to be able to register and submit a trouble ticket in a single form instead of a separate registration process and case submit form, there is a special ASP form you should reference somewhere on your customer site. One should make a HTML link to the OneStepTicket.asp module in the customercenter directory to call this one step approach. If users want to update their cases, they can use the standard login. With this page, users are only asked for first name, last name, email and phone number. The program will create a customer account for them and

create the case with all of the standard email notifications in a single step. A default password of "password" and username of their customer_id is also created and sent to them in an email for future updates.

Step 14: Review and implement the most effective customer information importing and Login methods for your organization.

There are now several options available for importing customer information into the Web+Center system and different methods to allow to customer to log into the customer+center portal application. Each of the options are listed below and how to find additional information on configuring each of the various options.

(1) Default Customer+Center option – The default option for the Web+Center "out of the box" configuration allows customers to self register on the customer+center home page. Customer records can also be created in the Tech+Center or Business+Center or Pocket+Center applications.
(2) Customer records can be importing using Customer Import Wizard found under Administration.. system configuration menu and customer import wizard. Please refer to the programmers guide for more information on importing customer data into the Web+Center application.
(3) You can configure customer logins that do not require passwords by clicking on Administration.. System configuration menu and Other Configuration under security options.
(4) Complete Active Directory customer logins and Active directory uploading of information is possible with the Web+Center Active directory component. This requires some configuration to allow the Web+Center application to communicate with your Active Directory server at the application level. For this configuration, please refer to the AD Configuration and integration guide in the documentation directory.
(5) If you import customer records into the Web+Center database, it may be necessary to remove the customer self registration option from the customer+center home page. Simply edit and remove the default.asp page code that provides for the self registration options.
(6) The Web+Center can handle a mix of customer login method (Active Directory login and Sync using the DoAutoLogin.asp call or other external customers can login using the Customer+Center login.

Step 15: Asset Management

The Web+Center application comes with an asset management system to import assets and track and associate trouble tickets with particular assets. The asset management component is designed to be very flexible and configurable to allow the fields names to match your own asset field requirements. Please refer to the programmers guide for more information on the configuring the Asset management component. If you do not plan to use the asset component, it is best to turn it off by going to Administration.. system configuration menu and system configuration options. Uncheck the enable assets database option. This will remove the Assets button from the left hand side button handle. You can always re-enable the assets component later.

Step 16: Customer Lookup options

Throughout the Web+Center, there are screens and form options that require the defining of a Web+Center customer to complete a particular task. There are two primary ways that the system can be configured. How the customer_ID fields get filled can be configured on clicking on Administration.. system configuration menu, and system configuration options. In the upper right hand corner you will see the options:

(1) Copy and Paste from Entry in Pop-up Window
(2) Use Pull-Down Menu
(3) Click on Entry in Pop-up Window

The default option is pull down menu. If your customer drop down list gets too large (over 500 customers, it is recommend you go to the click on entry in pop-up window option. This brings up a separate pop up screen that allows searches by company, email or first or last name and then a simple click of the user will fill in the customer_id field.

Conclusion:

You Web+Center application is now ready for operation. Techs, support groups, categories, and other configurations can all be fine-tuned as you start to use the Web+Center application by using the appropriate function under the Tech+Center administration menu.

Additional and more advanced customizations are possible to both the Customer+Center and Tech+Center, Pocket+Center and Reservation+Center applications. Information on how to add new buttons or create very customized reports are all included in the User Guide. Advanced customization options are also listed in the Programmers Guide. A powerpoint training module is also available for tech staff members. All of the web+center documentation is available in the \documentation directory of the webcenter folder.