

VersaDev

Delivering Business Software Solutions

versaSRS HelpDesk Installation Manual

Software Installation
Database Installation
System Configuration

Version 4.0.0

Sites with an existing installation please note: The versaSRS HelpDesk v4.0.0 software supplied as part of this download package **IS NOT** an update or upgrade against any previously installed version. Ongoing software upgrades are only available to customers whom have taken out a paid upgrade insurance package (currently included in Annual Support and Maintenance). Customers with upgrade insurance will receive an explicit **Upgrade Package** directly from VersaDev which will include mechanisms to upgrade the versaSRS HelpDesk database to be compatible with the v4.0.0 software application. If you have a pre-v4.0.0 installation of versaSRS HelpDesk, and have not taken out a paid upgrade insurance package, **DO NOT** proceed with this installation – contact VersaDev Support at support@versadev.com to enquire about upgrade options.

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Technology used and minimum system requirements

versaSRS Technology

- 100% Web Browser Based Solution
- Microsoft .Net Framework
- Microsoft ASP.Net
- Web Services
- Microsoft .Net Windows Services

Hosting Requirements

When your company purchases versaSRS HelpDesk, VersaDev provides a ASP.Net application and a SQL Server database structure. Your company is responsible for providing the hosting server(s). Minimum hosting requirements are listed below:

- Microsoft Windows
 - Server 2008, or
 - Server 2003, or
 - Server 2000, or
 - Vista*, or
 - XP*
- Microsoft Internet Information Server (IIS) 6.0 / 7.0
- Microsoft .Net Framework 2.0 (available as a free download from Microsoft)
- Microsoft SQL Server
 - 2005, or
 - 2000, or
 - 2005 Express Edition (available as a free download from Microsoft)
- ASP.NET

** Microsoft Windows Vista, Windows XP is only suitable for evaluation purposes and single user instances. More than one user environments will require MS Windows Server 2008, 2003 or 2000.*

Client Requirements

- Web browser: Microsoft Internet Explorer 7.0 and above
- Pop-Up Blocking Software Disabled or App Added to Allowable Site List
- Java Script enabled
- Cookies enabled
- Screen resolution 1024 x 768 (min)

Installing the versaSRS HelpDesk Application

Unzip the contents of the Software Download Package to a folder or location on the Server where the versaSRS HelpDesk application is to be installed. **versaSRS HelpDesk is installed by means of a single wizard based installer.**

The versaSRS HelpDesk installer caters for Windows 2008, 2003 or 2000 Server and Windows Vista* or Windows XP*, and is named:

versasrs_v4_0_0.msi

The most recent version of the versaSRS HelpDesk Software Package can be downloaded from our website:

<http://www.versadev.com/versasrsdownload.aspx>

Please Note: If you will be installing versaSRS HelpDesk on either Microsoft Windows Server 2008 or Microsoft Windows Vista - please reference this KnowledgeBase Article (required changes to IIS settings) prior to running the versaSRS HelpDesk Installer Wizard;

<http://www.versadev.com/kbview.aspx?kbaid=183>

Running the versaSRS HelpDesk application installer wizard

- Step 1:** Welcome Screen. Click the **NEXT** button to start the installation process.
- Step 2:** **Accept** the License Agreement.
- Step 3:** **Familiarize yourself** with the **System Requirements** and Installation Notes.
- Step 4:** **Complete** the required **User Information** and **User Installation Type**.
- Step 5:** Use the **Default** installation destination folder path, or select a new folder path.
- Step 6:** Click **NEXT** to proceed with the installation, or
Click **BACK** to re-enter and correct any installation information, or
Click **CANCEL** to cancel the installation process.
- Step 7:** **View** the **README.HTM** page on completion by clicking the **FINISH** button.

** Windows Vista and Windows XP is only suitable for single user instances. More than one user environments will require MS Windows 2008, 2003 or 2000 Server. NOTE: the versaSRS HelpDesk installer needs to be run on the designated server where versaSRS HelpDesk is to be installed. Administrative privileges are required on the server/workstation to run the installer.*

Installing the versaSRS HelpDesk Database

The versaSRS HelpDesk database is installed and configured by using the '**versaSRS HelpDesk - System Management Console' (SMC)**, which was installed by default during the versaSRS HelpDesk application installation. For correct database installation - the SMC must be run on the Server where SQL Server is installed and running.

The SMC for versaSRS HelpDesk is a stand-alone GUI desktop application, which allows System Administrators to effectively and easily manage many of the settings that control the behavior of the versaSRS HelpDesk application. The SMC should be used as the primary mechanism for continued configuration, management, and updates to the versaSRS HelpDesk application and database.

Using the SMC to install the versaSRS HelpDesk Database

- Step 1:** If your installation of SQL Server is installed on the **SAME** machine as the versaSRS HelpDesk application – proceed directly to **Step 2**.
- Step 1a:** If your installation of SQL Server is installed on a **DIFFERENT** machine than that of the versaSRS HelpDesk Application:
DO NOT PROCEED WITH THIS SECTION - instead, please reference this Knowledge Base article first: <http://www.versadev.com/kbview.aspx?kbaid=186>.
Following completion of the steps detailed in the above Knowledge Base article – proceed directly to the next section, skipping steps 2 through 8 below.
- Step 2:** To **launch** the SMC, select: **START > Programs > versaSRS > versaSRS-SMC**
- Step 3:** **Select** the **New Installation** Icon.
- Step 4:** **Connection Tab. Enter the following:**
→ **Server Name Details**
(*MSDE & SQL Server 2005 Express Installations may require the syntax 'MACHINENAME\SERVERNAME'*)
→ **Login Credentials Details**
- Step 5:** **Click** the '**Test Connection**' button to connect to the SQL Server Database.
On successful connection the remainder of the panel will populate with connection information, including the **Connection String** and **Connection Log** information.
- Step 6:** Under the heading '**Create new database for versaSRS HelpDesk**':
→ Click the '**Browse ...**' button to locate the database creation file '**dbcreate.xml**'.
- Step 7:** Under the heading '**SQL Database Scripts**':
→ In the '**DB Name**' box, either use the database name as shown, or define a different database name.
- Step 8:** Click the '**Execute**' button to proceed and **create** the versaSRS HelpDesk database.

Installing the versaSRS HelpDesk Mailing Services

In order for versaSRS HelpDesk to accept submissions via email:

- a **POP3 enabled mailbox** is required. (minimum system requirement)
- the versaSRS HelpDesk Windows Mail Services need to be installed, configured and running.

Step 1: The SMC should automatically focus on the **Mailing Services** tab, if not, click the Mailing Services tab.

Step 2: **Click** the '**Browse ...**' button to locate the Windows Services Installer File '**installsrs.cmd**'.

Step 3: **Click** the '**Run**' button to execute.

Configuring the versaSRS HelpDesk Database Settings

Step 1: Click the **Database Settings** Tab.

Step 2: Under the section '**versaSRS HelpDesk Application Configuration**':

→ Click the '**Browse...**' button to locate the versaSRS HelpDesk '**Web.config**' file.

(The web.config file is used to store the DSN entry to allow the application to connect to the database).

→ Click the '**Apply Changes**' button to write the Database Connection String to the web.config file.

Step 3: **NOTE! Only complete this step if the Mailing Services have been installed as per the previous section. Otherwise, go straight to the next section – 'Configuring the versaSRS HelpDesk Application Settings'.**

Under the section '**versaSRS HelpDesk Registry Configuration**':

→ Click the '**Locate Registry**'.

→ Click the '**Apply Changes**' button to write the Database Connection String to the Registry.

Configuring the versaSRS HelpDesk Application Settings

- Step 1:** Click the **Application Settings** Tab.
- Step 2:** Click the '**Load Settings ...**' button to retrieve the current Database Settings.
The Application Settings will be retrieved and displayed in the Tree View in the left panel.
- Step 3:** **Ensure** that the Database Connection String settings for "**CRMDSN**", "**FCTDSN**" and "**VersaAssetsDSN**" are defined correctly to match that of the versaSRS HelpDesk Application Database Connection String settings (the system will prompt you in Step 5 regarding these settings also).
- Step 4:** **Select** any other required **Application Settings Value** from the Tree View and make any necessary changes that correspond to the Application Setting selected, in the right panel.
- Step 5:** Click the '**Apply All Changes**' button to commit the changes and to set System Module DSN's and other components.

Applying the versaSRS HelpDesk License Key

- Step 1:** Click the **System Information** Tab.
- Step 2:** **Paste** or **Type** the issued **License Key** (including the dashes) into the '**License Key**' field.
→ Click the '**Apply Key**' button to commit.

**versaSRS HelpDesk is now installed, configured,
license activated and ready to use**

Default Application System Font

The default font used for versaSRS HelpDesk V4.0.0 is "Segoe UI". This font will already be installed on your machine if you are using Microsoft Windows Vista or have Microsoft Office 2007 installed.

If you are not using a Windows Vista workstation to access versaSRS HelpDesk or do not have Microsoft Office 2007 installed, it is recommended that you download and apply the Segoe UI font to your workstation for optimal display.

Instructions for installing the Segoe UI font:

- (1) Download the Segoe UI font below
- (2) Open Control Panel
- (3) Click Fonts
- (4) Drag the Segoe UI Font to the Fonts Folder.

Download Segoe UI Font here: <http://www.windowsforums.org/downloads/SegoeUI.ttf>

The Segoe UI font is copyrighted to Microsoft©

Managing & Configuring versaSRS HelpDesk Settings - Post Installation

Using the SMC to manage & configure versaSRS HelpDesk

Step 1: To **launch** the SMC, select;

START > Programs > versaSRS > versaSRS-SMC

Step 2: **Select** the **Configure** Icon.

Step 3: **Connection Tab. Enter the following:**

→ **Server Name Details** (SQL 2005 Express Installations may require the syntax 'MACHINENAME\SERVERNAME')

→ **Login Credentials Details**

→ **Database Name**

Step 4: **Click** the '**Test Connection**' button to connect to the SQL Server Database.

On successful connection the remainder of the panel will populate with connection information, including the **Connection String** and **Connection Log** information.

Step 5: The following **Tabs** will now be available to you to configure and manage versaSRS HelpDesk:

- **Database Settings**
- **Application Settings (see next section)**
- **System Information**

These Tabs and their respective components operate in the same manner as detailed in the previous sections.

The '**Database Settings**' typically should not need to be changed or modified - unless you wish to re-install the Mailing Services, or need to change the Database Connection String (DSN).

System Configuration – Advanced

Application Settings

versaSRS HelpDesk allows for many and varied under-the-bonnet tweaks which can assist in making versaSRS HelpDesk work in a desired manner, and allow for site specific requirements in system behavior and usage.

These **Application Settings** are comprehensively managed using the **versaSRS HelpDesk – System Management Console (SMC) – through the Application Settings Tab.**

Please Note: Changes to the versaSRS HelpDesk application settings through the SMC will not impact System User sessions, however, any changes will not be visible or available to System Operator sessions of versaSRS HelpDesk until the following is performed.

The System Administrator, through the versaSRS HelpDesk application, forces a **RELOAD** of the **Global Settings**.

This is achieved through the versaSRS HelpDesk Application Menu option; **'Administrator > System Tools > System Info'**, scroll to the bottom of this panel then click the **'Reload Global Settings'** button.

System Users then need to either, **Close** and **Re-Open** their application sessions, or **Refresh** their current versaSRS HelpDesk session by pressing **F5**.

System Configuration – General

Setting the Authentication (login) mode for versaSRS HelpDesk

VersaDev supports a number of authentication options, which are set through the versaSRS HelpDesk **'web.config'** file under the relevant section therein. By default the application is shipped to use **Windows Based Authentication** but can also be configured for **Forms Based Authentication**.

When adding system users into versaSRS HelpDesk, you will need to set up their username to be exactly the same as their windows login username (preferably without any domain prefix*).

The password field for each user must contain at least 1 character or a space (this will not actually be used as the user's Windows password will be used instead).

When a user starts up versaSRS HelpDesk the system will then use their Windows credentials and will launch straight into versaSRS HelpDesk.

Setting the Authentication Mode FAQ; <http://www.versadev.com/kbview.aspx?kbaid=130>

** Note: Domain prefixes can be accommodated for sites that use multiple domains, however, certain Application Setting variables need to be applied. Please contact VersaDev Support for assistance in this area if your environment requires it.*

Configuring the Quick Launch Buttons

The Quick Launch buttons (bottom left corner of application window) are configured via an XML file (**CustomButtonBar.xml**) located within the root directory folder of the application.

The XML file allows you to define 7 custom buttons as defined below:

<code><ButtonText>versaCRM</ButtonText></code>	Button Display Text
<code><ButtonURL>http://localhost/versacrm</ButtonURL></code>	URL to launch on button click
<code><ButtonTarget>rightFrame1</ButtonTarget></code>	Target Window (see below)
<code><ButtonFeatures></ButtonFeatures></code>	reserved
<code><ButtonCommand></ButtonCommand></code>	reserved
<code><ImageURL>images/reassign1.gif</ImageURL></code>	URL to Button icon
<code><ImageMouseOver>versaCRM</ImageMouseOver></code>	Button Mouse Over text (tool tip)

ButtonTarget values:

<code>_blank</code>	launch in new window
<code>rightFrame1</code>	versaSRS HelpDesk Calls Panel (see Getting Started Guide for panel definitions)
<code>rightFrame2</code>	versaSRS HelpDesk System Tools Pane (see Getting Started Guide for panel definitions)

The Quick Launch Buttons can be minimized by default via the web.config application setting of versaSRS HelpDesk:

`<add key="ShowCustomButtonBar" value="1"/>` value = 0|1 hide and show respectively.

Configuring versaSRS HelpDesk for In-Bound Email Automatic Call Logging

In order for versaSRS HelpDesk to accept job submission via email, a **POP3 enabled mailbox** is required (minimum system requirement), and the versaSRS HelpDesk Mail Services need to be installed, configured and running.

If the corporate mail server cannot support POP3, using an alternative mail server just to support versaSRS HelpDesk inbound mail could be used, such as MailEnable or the mail server available with Windows 2003 Server. You would still use your corporate mail server to send email (SMTP - based).

To enable POP3 in Exchange:

- (1) On your Exchange Server, enable and start the "Microsoft Exchange POP3" service from the Windows services control panel.
- (2) Make sure that the "Default POP3 Virtual Server" is started in Exchange System Manager (under Servers\Servername\Protocols\POP3)

In the properties of the Default POP3 Virtual Server you can also set access control to only allow connections from certain IP addresses. You can set this to be the IP address of the versaSRS HelpDesk server if versaSRS HelpDesk is the only application that will be using POP3.

POP3 Mailbox with multiple Queues and Assigned Email Addresses

- Step 1:** Create or use an **existing Primary POP3 Enabled Mailbox** (for example, helpdesk@domain.com). (refer to diagram).
- Step 2:** **Designate a Default Queue** and associate this email address with this Queue (through Administrator > Manage System Queues), select the Queue to use (or create a new Queue if required) and click Edit. In the Primary Address field enter the above email address).
- Step 3:** Using the **versaSRS HelpDesk - System Management Console**, set the **Application Settings** for:
- **POP3Password**
 - **POP3Profile**
 - **POP3Server**
 - **SMTPServer**
- to the necessary required credentials – this will allow the versaSRS HelpDesk application to log into the Mailbox and process the emails.
- Step 4:** **Stop** and **restart** the **versaSRS MailIn Service** on the Server. All incoming emails will be logged by default to this defined Primary Queue.

Should you wish to assign a different email address to different Queues, for example, emails to support@domain.com to go into the Support Queue, emails to sales@domain.com to go to the Sales Queue, etc. then the following is required:

- Step 1:** Create **email aliases** against the **POP3 Mailbox account** (helpdesk@domain.com), as per the above example, support@domain.com and sales@domain.com.
- Step 2:** For each of the queues in question (through Administrator > Manage System Queues, selecting the queue to use and clicking edit (or creating a new queue if required)), set the aliased email addresses to those queues in the Primary Address field). So for the Support Queue the Primary Address will be support@domain.com, and for the Sales Queue the Primary Address will be sales@domain.com.

Multi POP3 Mailboxes with multiple Queues and Assigned Email Addresses

- Step 1:** Create **POP3 Enabled Mailboxes** for **each Queue** you wish emails to be delivered to. (refer to diagram).
- Step 2:** **Designate a Default Queue** and associate this email address with this Queue (through Administrator > Manage System Queues, selecting the Queue to use (or creating a new Queue if required)) and click edit. In the Primary Address field enter the required email address. Repeat for each Queue.
- Step 3:** Through **SQL Server Enterprise Manager or SQL Server Management Studio** (depending on the version of MS SQL installed), open the Table **tbl_POP3**. Enter the required information for each of the Mailboxes as defined in Step 1. Ensure that the Status for each is set to **1** (Active).
- Step 4:** Using the **versaSRS HelpDesk - System Management Console**, set the **Application Setting:**
- **MultiPOP3** to **Enabled**.
- Step 5:** Using the **versaSRS HelpDesk - System Management Console**, set the **Application Setting:**
- **ApplyDefaultQueue** to **Disabled**.
- Step 6:** **Stop** and **restart** the **versaSRS MailIn Services** on the Server where they are installed.

All incoming emails will be delivered to the defined Queues.

Configuring versaSRS HelpDesk for Out-Bound Email

The versaSRSMailOut Windows Service is responsible for sending email.

Settings specific to this service are defined via the system Application Settings. The values of these settings are defined via the versaSRS HelpDesk – System Management Console.

Step 1: Using the **versaSRS HelpDesk - System Management Console**, set the **Application Settings** for:

- **SMTPServer**
- **SMTPPort**

to the necessary required settings appropriate for your environment.

Step 2: **Stop** and **restart** the **versaSRS MailOut Service** on the Server if you apply any changes to these settings.

In-Bound and Out-Bound Email Troubleshooting

versaSRS HelpDesk uses POP3 to receive email and SMTP to send email.

To assist with Mail-In and Mail-Out Troubleshooting - the versaSRS HelpDesk MailIn and MailOut services always generate log files, located within c:\temp by default and are named "**versasrsmailinlog.txt**" and "**versasrsmailoutlog.txt**".

Open these files using Notepad to determine what the services are doing and if any errors have been encountered and recorded.

The following Telnet test should also be performed on the Server running the versaSRS Windows Services to confirm that the server is able to perform the required email processes.

POP3 - Telnet Test

From a command prompt type the following:

telnet *host port#* (then press enter)

Where host is the name or IP of Exchange Server and port#=110 (default)

user *username* (then press enter)

*Where username = username of the POP3 enabled mailbox
(this may be the alias name of the format MyDomain\MyUsername)*

Pass *password* (then press enter)

Where password = account password

Note the message returned by telnet. If it reads "OK Successfully logged" then the versaSRSMailIn service configured with the same settings will work.

Once email in the POP3 account has been processed by versaSRS HelpDesk it is deleted by default.

SMTP - Telnet Test

From a command prompt type the following:

telnet host port# (then press enter)

Where host is the name or IP address of the Exchange Server and port# = 25 (default)

helo test (then press enter)

mail from: helpdesk@yourdomain (then press enter)

rcpt to: <your email>@yourdomain (then press enter)

Where <your email>@yourdomain is some other email to qualify if email was sent successfully.

data (then press enter)

Hi from Me

(then press enter, full stop, enter to send the message)

If there were no errors, the MailOut service will be able to send email and is working correctly.

versaSRS HelpDesk Application Interface

The screenshot displays the versaSRS HelpDesk application interface within a Microsoft Internet Explorer browser window. The interface is divided into several functional areas:

- System Toolbar:** Located at the top, it includes a "Goto Case" field, navigation buttons, and three "Qualifier" dropdown menus.
- Queue:** A central table listing support requests. The table has columns for Case #, Status, Priority, Due Date, Requestor(s), Issue, Owner, and Group. A "Calls Panel" label is overlaid on this section.
- Queue Navigation Panel:** A vertical sidebar on the left containing a tree view of support categories such as "General Support", "NEW Support Requests", "Post-Sales Support", "Pre-Sales Support", and "VIP Client Support". A "Queue Navigation Panel" label is overlaid on this sidebar.
- Database Schema - Fields / Tables:** A panel on the right showing details for Case # 22428. It includes fields for Case #, Logged, Logged By, Case Type, Received By, Status, Issue, and Details. A "Reading Panel" label is overlaid on this section.
- Call Tools:** A context menu is visible over the queue table, listing actions like "Details", "Update", "Reassign", "Watchers", "Printer Friendly", and "Mark As Dead". A "Call Tools" label is overlaid on this menu.
- Events:** A calendar view at the bottom showing a grid for the month of July 2006. A "Preview Panel" label is overlaid on this calendar.
- Custom Button Bar:** A vertical sidebar on the bottom left containing buttons for "VersaCRM", "Reporting Dashboard", "Quick Links", "Astoria", "Currency (XE)", and "Projects". A "Custom Button Bar" label is overlaid on this sidebar.

At the bottom of the browser window, it shows the user is logged in as "Warren Bullock" and the time is 10:02:18. The status bar at the very bottom indicates "Done" and "Local intranet".

Setup & Usage Resources

versaSRS HelpDesk comes pre-installed with one Queue and a number of Skill Groups to assist you with setting up your environment.

This Queue and Skill Groups can be used as a template and guide to help you configure the system relevant to your business needs and operations. Alternatively if you wish to use the existing structure, simply rename to suit your business needs.

To understand how to setup and use versaSRS HelpDesk, please refer to the following resources:

Online Help	http://www.versadev.com/support/versasrs/online_help/
Knowledge Base	http://www.versadev.com/knowledgebasehome.aspx
FAQ	http://www.versadev.com/knowledgebasefaq.aspx
Screencasts & Video Demonstrations	http://www.versadev.com/kbview.aspx?kbaid=174
Forums	http://www.versadev.com/forums

Accessing Software Demonstration Screencasts via versaSRS HelpDesk

A wide range of Screencasts and Demonstrations, including interactive demonstrations, can also be directly accessed directly from within the application by clicking the '**Video Demonstrations**' button - located at the bottom-left of the application interface.

These Video Demonstrations graphically highlight and walk through much of the system setup, management and overall usage of versaSRS HelpDesk.

The Video Demonstration may also prove useful as a means of providing quick and easy training to your staff

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