WN Help Desk Web (Standard & Enterprise)

Support Documentation

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Installation Instructions

IIS 4.0 or Higher

WN Help Desk Web runs under Microsoft Internet Information Server (IIS) 4.0 or higher. If IIS is not already installed on your server you can setup IIS using the default Typical install. That will install the necessary components to support the WN Help Desk Web application. WN Help Desk is an ASP-based application, so for Windows Server 2003 computer you need to make sure that ASP support is enabled.

Installing the ASP application

1. Run the web.exe self-extracting executable to extract the files to a directory on the IIS computer from where you would like the help desk to run. The default folder is C:\WNHelpDeskWeb, but you can place the files in any folder. Make sure to give the IUSR_Computername account, which IIS uses for anonymous web access, at least read and execute NTFS permission for this folder and all files contained in the folder.

2. Open the Management Console for IIS to add a new Virtual Directory or a new Web Site for the help desk application. Point the new Virtual Directory or Web Site to the directory where you extracted the web.exe file in step 1 above. Make sure to grant the Allow Execute Access permission for the new site.

Setting up the System DSN for a Microsoft Access Backend Database

If you are using WN Help Desk Web Standard with a Microsoft Access MDB file for the backend database, use the following procedure to create the System DSN on the webserver.

1. Open the Control Panel ODBC tool.

2. Select the System DSN tab and click Add to create a new System DSN for the help desk application.

3. Select the Microsoft Access driver and click Finish.

4. In the Data Source Name field enter WickettNETApps. (NOTE: If you choose to use a different name for the System DSN then you will need to modify the Constant.asp file and change the name of the System DSN in the dbPath variable. This is useful if you are going to host multiple help desk instances on the same server.)

5. In the Database section click Select. Browse to the location of your MDB database file, select the file, and click OK. Click OK again to close the ODBC tool. (NOTE: If you are already running the non-web WN Help Desk application, you can use the same database file with this application. For performance reasons, you should relocate the shared data file to the webserver to increase the performance of queries. That will require that you update the location of your shared data file in the non-web version of the software. This will allow you to use the web interface for your customers and for

your technicians while they are out working, but still use the non-web version while you are at your desk. A new data file has been included with this application. The file is named WickettNETApps.mdb, but can be renamed to any name you choose.) Make sure that the IUSR_Computername account, which IIS uses for anonymous access, has Full Control NTFS permissions to the MDB file and the folder in which the file resides.

Setting up the System DSN for a Microsoft SQL Backend Database

If you are using WN Help Desk Web Enterprise with a Microsoft SQL Server for the backend database, use the following procedure to create the System DSN on the webserver.

1. Open the Control Panel ODBC tool.
2. Select the System DSN tab and click Add to create a new System DSN for the help desk application.
3. Select the SQL Server driver and click Finish.
4. In the Name field enter WickettNETApps. (NOTE: If you choose to use a different name for the System DSN then you will need to modify the Constant.asp file and change the name of the System DSN in the dbPath variable. This is useful if you are going to host multiple help desk instances on the same server.)
5. You can enter an optional description for the System DSN in the Description field.
6. Select the SQL Server from the drop-down list, or type the name of the server in the list and click Next.
7. Select the appropriate authentication method (NT Authentication or SQL Server Authentication) as directed by your SQL Server administrator and enter any necessary Login ID and Password.
8. Set the Client Configuration options as directed by your SQL Server administrator. Typically, the TCP/IP setting is used on port 1433.
9. Click Next to continue.
10. Check the box "Change the default database to" and select the help desk database from the list of databases that are available on the server.
11. Click Next, then click Finish. Click the Test Data Source button to verify that you are connecting to the SQL Server database. Then, click OK three times to close the ODBC utility.
12. Make any other necessary changes to the System DSN properties as directed by your SQL Server administrator that may be required for your environment.

Getting Started

Logging in for the first time

The WickettNETApps.mdb file that ships with the application already has the TBD technician configured. You can login as the TBD user to begin using the software. The TBD user initially has no password set. If you are using a copy of the shared data file from the non-web version of WN Help Desk, then you can login as any of the help desk technicians. Just make sure you have assigned a username to the technician's account so they can login.

Setting up the Help Desk Technicians

After you have setup the application, you will now want to add all your help desk technicians so they can begin using the software. To add a new technician first use the View and Edit User Information option from the Main Menu to create a new user and add the technician to the UserNames table. Each user is assigned a Unique Employee ID. This is an alphanumeric data field that can contain any unique identifier you choose. You can use Social Security Numbers, Employee Numbers, or any unique ID you choose.

After you have entered the technicians using the Create a New User option you add them as help desk technicians by using the Help Desk Staff Information option from the Main Menu. The TBD (To Be Decided) user account is used to perform the administrative functions of the application, so it will not appear in the list. This prevents other help desk technicians from modifying the TBD account. The TBD account is also used by the application for requests that are created using the E-Mail Ticket Generator, or to enter requests that will be assigned at a later time. To add a new technician, select the option to Create a New Technician. Select the account from the list of employees and then enter a Display Name for the user as you would like it to appear within the help desk. Once you have created all of the help desk technicians, go back to the Help Desk Staff Information option from the main menu and click the button next to the technician's name. This will allow you to set the options for the new help desk technician. The options are:

- Unique Employee ID – This is the ID that you assigned to the user's account using the Create New User form.
- Display Name – This is the name of the help desk technician as it will appear within the application.
- Start Date – This is an optional field that you can use to store the date that this technician began working at the help desk.
- End Date – Entering a date in this field will prevent the help desk technician from appearing in the list of available technicians (even if the date has not yet passed.)

There are also multiple security options for each help desk technician that allow you to specify which functions of the application they are allowed to use. These settings are self-explanatory.

Customizing the software

If you wish, you can modify the contents of the drop-down lists that pertain to Problem Category, Priority, Solution Category, Operating Systems, Level of Proficiency, Admins, and Org Codes (names of Departments, etc.)

All of these tables can be modified by selecting Database Options from the Main Menu. You do not need to modify these tables to begin using the software, but you can if you wish to populate these fields with information more specific to your company.

From the Database Options page select the table you wish to edit. There is an option for each of the tables that can be edited. Below is a summary of the information in each table and what it is used for in the application:

- View and Edit Problems Listing – This is the list of items available from the drop-down list of Problem Items for a request (What Went Wrong, or Problem Category.)
- View and Edit Solutions Listing – This is the list of items available from the drop-down list of Solution Categories for a request.
- View and Edit Operating System Listing – This is the list of operating systems that can be specified for a user under the Add New User or View and Edit User Information forms.
- View and Edit Level of Proficiency Listing – This is the list containing the description of a user's level of proficiency. This list is used on the Add New User and View and Edit User Information forms. There is an option for level 20, Ex-Employee, that is used by the software to keep track of Ex-Employees while still allowing their requests to be tracked. Do not delete this level, as it is used by the software.
- View and Edit Admin Listing – This list contains the names of the Administrative Assistants who support the users. Typically, if a user is not available there is an administrative assistant who can be contacted for information about the user. This list is available from the Add New User and View and Edit User Information forms. Information about the administrative assistant is available from an open request so that if you cannot contact the user you can try and contact the administrative assistant.
- View and Edit Priority Listing – This list contains the options for setting priorities on a request. When creating a new request, or evaluating an existing request, the contents of this table are available to assign a priority to a request. Setting the Hours Til Due option for a specific priority level will cause the due date to be automatically calculated for that priority level when creating a new request.
- View and Edit Org Codes/Department Listing – This is the list containing the Org Codes or Departmental descriptions for your company. The contents of this list are available when using the Add New User or View and Edit User Information forms.

Adding Users

Once you have configured the software to be used by your help desk technicians and optionally customized the fields of the database for your company, you are now ready to begin adding accounts for the users you support.

To add new users, use the View and Edit User Information option from the Main Menu and select the option to Create a New User. Remember, each user must have a Unique Employee ID assigned. After the user's account has been created their password will be blank. The first time they login to the web application (if you have enabled the option for that user to login) they will be required to change their password before using the web application.

Logging Requests

The Basics

To add a new request, select the Log New Help Request option from the Main Menu. Select a "Reported For" user by typing in partial user information and clicking the Check User Name button. The "Reported By" user defaults to the current technician, but can be changed to another user by clicking the Clear User Name button. For both the "Reported By" and "Reported For" users you can simply click the check user name button with no information entered to bring up the entire user list. If needed, modify the Call Taken date and time. Select a Priority for this new request and then click the Submit button to proceed with the second step of creating the new request. NOTE: if your application administrator has defined custom fields for a request they will be shown just below the above information on the first page of the new request form.

From the Problem Category list select an item that describes the problem the user is having. In the Short Description field type a short description of the problem the user is reporting.

You can assign a technician for the default assignment on this request by selecting their name from the Assigned To field.

Assignments

You can now create an unlimited number of assignments on a request. This allows for multiple technicians to work on different assignments that relate to the same request. For example, a request to setup a new user account may have an assignment for a network administrator to create an account, an assignment for a technician to configure the workstation, and an assignment for a telecom technician to setup the phone. Each assignment can also have a due date set.

Journal Entries

Technicians can now create an unlimited number of journal entries on a request to account for the work they have done and the time they have spent working on the request. The journal entry also contains a last modified field so you can see when the entry was last updated.

Working with Existing Requests

Viewing Your Open Assignments

To see a quick listing of all Open Assignments that are assigned to you click on the View My Open Assignments option from the Main Menu.

Viewing Unassigned Assignments

To see a quick listing of all Open Assignments that are assigned to the TBD user (To Be Decided) select the View Unassigned Assignments option from the Main Menu.

Supporting File Uploads

Configuring the software

WN Help Desk Web now supports file uploads by both users and technicians. This allows you to associate files with a help request. To enable this feature you must make some changes to the Constant.asp settings file. First, there are two variables to enable this for the user and technician interfaces called varAllowTechsToUploadFiles and varAllowUsersToUploadFiles. Next, you must specify the physical path to the upload location in the varUploadLocation variable, and the URL path to that same location in the varUploadLinkLocation variable. You will need to make sure that you give the IUSR_Computername account write permissions to the physical file folder location for the uploads to function correctly. Also, if the file location is not within the same URL as your help desk application you will need to use the IIS management console to setup a new website or virtual directory to point to this physical upload location. For example, if you are running WN Help Desk Web from "C:\WNHelpDeskWeb" on the IIS computer, and you wish to set the uploads to "C:\WNHelpDeskWeb\Files\" you will need to enter that physical path in the varUploadLocation variable. If the URL to your website is "http://helpdesk.mycompany.com/" then the varUploadLinkLocation variable will be "http://helpdesk.mycompany.com/files/". However, if you are going to run a separate upload location (a good idea for security purposes to prevent users from uploading malicious code and executing that code) you will need to specify the physical location to the upload directory and the URL to that directory in the appropriate variables. This does not have to be on the same server hosting the WN Help Desk Web software, and the upload server does not need to be running IIS.

Supported Upload Controls

WN Help Desk Web supports two ActiveX controls for uploads. The supported controls are saFileUp by SoftArtisans (www.softartisans.com) and aspSmartUpload by aspSmart (www.aspsmart.com).

Using the Custom Query Builder

Creating a New Query

To create a new query select the Custom Queries option from the Main Menu. A dialog will be presented showing the available custom queries for current technician. You can remove a

custom query by highlighting the query and clicking on Delete, you can create a new query by clicking the New button, or you can edit an existing query by double-clicking on the query name in the list.
The custom query editor allows you to create standard SQL queries to be used in displaying help requests. There are 2 methods for using the field name and operator list to create a query as desribed below:

Method 1:
Select a field name from the Field Name list. Then, double-click an operator from the Operator list. The SQL text will be created in the window and you can then replace the text VALUE with the value you wish to find.

Method 2:
Select a field name from the Field Name list. Next, single-click an operator from the Operator list. Then, click the Browse Field Data button to populate the right-hand column with any field data pertaining to the selected field. Finally, double-click on the field data to generate the SQL text.

Multiple SQL statements can be joined together using the AND and OR operators to perform advanced queries. Some examples of queries are listed below:

Query to find all open help requests:
HelpRequests.ProblemSolved Is Null

Query to find all open help requests assigned to the TBD account:
((HelpRequests.ProblemSolved Is Null) AND (Assignments.AssignTech = 'tbd'))

Query to find all closed tickets for January of 2003:
HelpRequests.ProblemSolved BETWEEN #1/1/2003# AND #1/31/2003#
NOTE: The date separator character for an Access MDB backend database is the pound (#) character, while a Microsoft SQL backend database uses the single-quote (‘).

Prompting for User Input in Custom Queries:

You can create dynamic queries by prompting for user input when the query is run. You can click the button in the query builder form to create the default queries to view a few examples of queries that prompt for information. The format for prompting for information is:

{prompt:Title of Prompt Window}

When the query is run the prompt section between the brackets will be replaced by the input that the user types when prompted. If you wish to use the same prompt information in multiple replaces in the same query, and don't wish to prompt more than once, use the exact same {prompt:} section to prompt for the query. For example, to see open tickets where the reported by or reported for employee number is equal to some dynamic user input, use the following query:

(HelpRequests.ProblemSolved IS NULL) AND ((UserNames.EmployeeNumber = '{prompt:Enter an Employee Number}') OR (HelpRequests.ReportedBy = '{prompt:Enter an Employee Number}'))

Since both {prompt:} sections are identical, the user will only be prompted for the information one time.

Saving a Custom Query

After generating the SQL text you must click the Check button to validate the query. If the query is valid the Save button will become active. You will then be prompted for a name for your query. If you enter a name that is already in use you will be prompted to overwrite the existing query.

Using Custom Queries:

From the Main Menu select the Custom Queries menu and select one of your queries from the list. Any requests that match the query criteria will then be displayed.

Closing an Open Request

To close an Open Request you must resolve the last open assignment on the request. You will need to enter a description of the solution in the Solution Details area and select a Solution Class from the drop-down list. The Hours Open field can be used to keep track of the time the request was open, or the amount of time spent working on the request. If the hours open field is not filled in, or if the number is zero, then the hours open will automatically be calculated for you based on the work days and hours as specified in the Constant.asp file.

Editing User Information

Use the View and Edit User Information option from the Main Menu to update user information. Select a username by using the Check User Name button and click View and Edit User Information to edit the information for the selected user.

This form is used to keep track of information about a user. The fields are described below:

- Last Name – This is the last name of the user.
- First Name – This is the first name (given name) of the user.
- Phone Number – This can contain a full phone number, or an extension where the user can be reached.
- Room Number – This can be used to enter the room number or other descriptive location information about the user.

- E-Mail Address – This field is used for multiple functions in the help desk. If you wish to send an e-mail to the user when a request is closed, or use the Send Status E-Mail to User function from a request, then the user must have an e-mail address assigned. Also, this field is used by the ETG (E-mail Ticket Generator) to automatically assign new requests to the correct employee by looking up the e-mail address.
- Username – This field had two purposes. First, it can be used to keep track of the user's network login ID. This is also the username a user will enter to login to WN Help Desk Web.
- Allow Login – This option specifies whether or not the user can login to WN Help Desk Web.
- Allow Update – This option specifies whether or not the user can update their own user profile while logged in via the web interface.
- Address Fields – These fields (Address Line 1, Address Line 2, City/Province, State, ZIP/Postal Code, Country/Region) allow you to keep track of your user's address.
- Department – This is the list of Org Codes that can be edited using the Help Desk Options menu under the Database tab. This allows you to specify what department or org code the user belongs to.
- Administrative Assistant – This is the list of Administrative Assistants that can be edited using the Help Desk Options menu under the Database tab. This allows you to specify the Administrative Assistant that supports this user.
- Level of Proficiency – This is the list of Levels of Proficiency that can be edited using the Help Desk Options menu under the Database tab. This allows you to specify a skill level for the employee. There is also an option for Level 20, Ex-Employee. This is used to prevent the employee from showing in the list of employees, but allows them to remain in the database so their requests can still be tracked.
- Operating System – This is the list of Operating Systems that can be edited using the Help Desk Options menu under the Database tab. Use this field to specify which operating system the user uses.
- Notes – This field enables you to record any additional information for the user.
- There are also 9 additional fields that can be used to store custom user information. The option to show these fields, along with the text to display next to the fields, can be set in the Constant.asp file.

User Access

Logging In

If you have given the user access to login using the web client they will be able to login from the main login page. When their account is initially created the password will be blank. The user will have to change their password at the first login before access to the application will be allowed.

Log a New Help Request

Users will be able to submit a new request using this option from the main menu. The user can select a Problem Category, a Priority, and enter a description of their problem. Optionally, a user can submit a new request for another user. If this is the case select the radio option to specify the ticket is for another user and select the user's name using the standard user lookup form.

View Help Requests

Users can use this option from the Main Menu to get a listing of their help requests. Also, depending on the access you have given the user, they will be able to select the option to view their requests, view all requests in the organization, or view all requests. These options relate to the two user account settings 'Allow User to View All Request in Same Org' and 'Allow User to View All Requests.' The user can also select to show open requests only, closed requests only, or both open and closed requests. Finally, the user can specify a date range to show requests for, or select the Show All Dates option. Running this query will bring up a list of requests matching their criteria, if any. Selecting the Details on a specific request will allow the user to view the details for that request.

Change Your Password

Users can use this option to change their password used to gain access to the web application. Passwords are encrypted with a one-way hash encryption before being stored in the Access database file for security purposes, since most users will tend to use the same password for all accounts. So, gaining access to the UserNames table will not give a person access to the user's password.

Update Your User Information

If you have enabled this ability for the user then the user will be able to update their own profile information from the web application. This allows the user to make changes with their name, address, phone number, location, admin, department, and operating system.

Advanced Options

Importing Users from an External File

If you have more than a few users that you wish to create in the help desk, and you do not wish to type in all the information for each user, you can import the information from a CSV file (Comma-Separated Values) using Microsoft Access to perform the import. The file must be in a specific format for the import to work correctly. The first row of the CSV file needs to contain the header information which is the names of the fields in the UserNames table where this information will be imported to. The first line of the CSV file should look like this:

LastName, FirstName, PhoneNumber, OfficeLocation, etc.

You must include at least the LastName, FirstName, LevelOfProficiency, and EmployeeNumber. The remaining fields are optional. However, if you do enter a value for the OrgCode field that OrgCode must already exist in the OrgCodes table or the data will fail to import. The AllowLogin and AllowEditInfo fields are Yes/No fields; use –1 for Yes and 0 for No.

You can create this information using any application that will allow you to export data in CSV format. For example, this could be created using Excel to format the data in the correct order and include the necessary header information on the first line.

A CSV header file can be downloaded from the FAQ area of the website. This sample file can be used as the starting point for your CSV file.

Once you have created the CSV file that you wish to import into the UserNames table, use the following procedure to import the data:

- Using Microsoft Access open the data file for the help desk and select Get External Data, Import from the File Menu.
- Select the CSV file that you wish to import.
- Select the Delimited option from the Import Text Wizard and click Next.
- Select Comma for the delimiter, click "First Row Contains Field Names" and click Next.
- Check the option for "In an Existing Table" and select the UserNames table from the drop-down list, then click Next.
- Click Finish and your information will be imported into the UserNames table.

This same procedure can be used to import data into any of the tables. You will need to generate a header file that contains the names of the fields in the table you wish to import information into.

Database Maintenance for a Microsoft Access Backend Database

You should make sure to perform daily backups of the shared data file to ensure that you never lose more than one day's worth of request information. The following procedure demonstrates how to use the ODBC database tools to maintain the consistency of the database and to keep the size of the database as small as possible, thereby reducing network traffic for queries and increasing database performance. This procedure requires that no one be connected to the database in WN Help Desk or WN Help Desk Web.

- Ensure that you have a backup of your current shared data file.
- From the Start Menu select Settings, Control Panel.
- Open the ODBC Control Panel utility.

- From the System DSN tab select the WickettNETApps System DSN and click Configure.
- In the Database area of the form click the Repair button, then click OK to repair the selected database.
- Click the Compact button, then click OK to repair the selected database.

It is recommend that you perform this maintenance on the database at least weekly, daily if time permits. Also, consider archiving old data by creating a backup of the shared data file, purging old records from the HelpRequests table, then repairing and compressing the database.

Database Maintenance for a Microsoft SQL Server Backend Database

Your Microsoft SQL Server administrator should already have a maintenance plan for the SQL Server. Make sure the database is backed up frequently and that any necessary database maintenance is performed.

Setting Options with the 'Constant.asp' File

Options Variables

The Constant.asp file is located in the root directory of the web application. The first section of the Contant.inc file contains the options for the application. Some examples are listed in the following paragraphs. All the customizable settings for the application can be found in this section. Each option is documented with a comment within the Constant.asp file.

For example, the optional text that will be added to the beginning of a ticket ID and appended to the end is stored in this section. If you do not wish to add any text, simply set the value to double-quotes ("".)

```
'--Options Variables
bstrAutoTicketNumberAddText = "ABC-"
bstrAutoTicketNumberAppendText = "-XYZ"
```

This section also contains the option for showing a graphic at the top of each page. If varShowLogo is set to true, the logo will be displayed for the Client menus. If varShowLogoForTechs is set to true, the logo will be displayed for the Technician menus. To set the alignment of the logo set the varLogoAlign variable to "center", "left", or "right." Finally, the varLogoFile variable contains the name of the graphic file that you wish to display. This file needs to be copied to the 'images' folder.

```
VarShowLogo = true
VarShowLogoForTechs = true
VarLogoAlign = "center"
VarLogoFile = "logo.gif"
```

This section also contains the option for disabling the requirement for password authentication during login. If varRequireUserPasswords is set to True, users must enter their password along with their username at the login screen. If varRequireTechPasswords is set to True, technicians must enter their password along with their username at the login screen. If these options are set to False then only the username must be entered at the login screen.

```
VarRequireUserPasswords = true
VarRequireTechPasswords = true
```

Text Label Variables

All the text that is displayed in the application can be customized by changing the values for the variables in this section. The variables are listed in alphabetical order in the file to make finding the desired variable as easy as possible. Simply change the value of the variable to customize the text in the application to better suit your organization. An example of the first two variables is listed below.

```
'--Text Label Variables--
bstrAddNewItem = "Add New Item"
bstrAddNewUser = "Add New User"
```

If you have made modifications to the Constant.asp file in a previous version and are upgrading to a new version you can check the Constant.asp file for the sections that contain the new additions in the latest version. This eases the migration to a new version for customers who have translated the text labels into another language, or who have made extensive settings changes.

Required Settings That Cannot be Modified

As stated above there are many options settings that can be modified. Also, the licensing of the software does allow for customizations of the code to suit your needs as long as you realize that once the software is modified it is no longer supported. Also, if you wish to upgrade to a future release of the software you would either need to abandon your customizations or make them again in the new version. **PLEASE NOTE:** No copyright information may be removed from the application and no references to Wickett.NET may be removed.