# Customer Web Service

Install Guide


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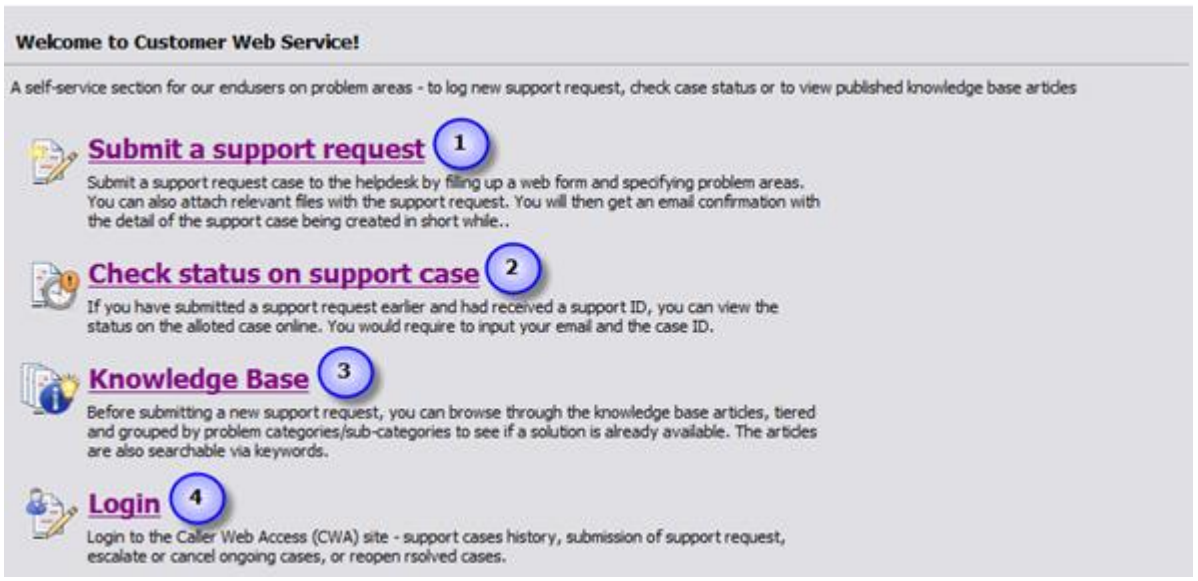
# Customer Web Service (CWS)

The Team Helpdesk web case submission allows for your end-users and customers to submit their service request through an intuitive, easy-to-use web form interface; needing only their favorite web browser.

The Customer Web Service (CWS) is a collection of ASP.NET webpages that cater to the helpdesk end users on the web. It consists of a structured support request submission webform, a support case status querying form, a self-service knowledge base and a special web interface exclusively for existing callers to access their support cases online. All these sections are available to any users accessing the customer service website except for the Caller Web Access (CWA) site, where only existing users are allowed to do so from the web.

Unlike other traditional web-based helpdesks, CWS site in Team Helpdesk does not require a dedicated database. Instead, the support cases submitted by customers are directly feed into the Team Helpdesk folders (i.e., stored in Exchange server) via one of the helpdesk manager add-in installed in Outlook (which can be set under *Team Helpdesk Manager > Web Access > Workload*). The helpdesk manager add-in services requests coming from CWS site and behaves like a server. That is why, we recommend that you assign the workload of processing and servicing the TWA and CWS sites to a dedicated system that is running 24x7.




1. Allows end-user to enter information on their problem on a structured web form.
2. Allows end-user to check and track the status of their support cases online.
3. Allows end-user to browse or search through the web-based knowledge base articles to find a solution on their problem.
4. Allows existing callers to access their exclusive member area online such that they can view support cases history, submit new support request directly, escalate or cancel ongoing cases or reopen existing resolved cases.

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**Why is Online Customer Service Important?**

Web-enabled customer service provides a variety of benefits. In addition to the fact that many prospective customers will refuse to do business with an organization if they don't offer some level of online support, benefits include:

- 24/7 customer service capability
- immediate response to customer inquiries
- meeting/exceeding constantly evolving customer demands
- improved customer satisfaction and customer relationships
- cost savings
- automation of repetitive tasks makes it easy for customers to do business with you
- re-allocation of customer service staff to value-add tasks
- acquisition of invaluable customer feedback and requests


## Configure Customer Web Service (CWS) on IIS

Before end-users and callers can start using Customer Web Service (CWS), the helpdesk administrator needs to first setup and configure certain settings, in the web access administrative panel in Team Helpdesk Outlook, and then on the IIS web server.

To install, setup and use Customer Web Service (CWS), the followings list the requirements on both the web server and the customer's system.

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**On the Web Server system**

- Microsoft Internet Information Server
- Microsoft ASP.NET 2.0 Enabled
- Write permission for ASP.NET users on a temporary subfolder under CWS IIS folder
  Note: As there is no direct interfacing between the CWS site and your Exchange server, the IIS web server does not need to be on the same windows server as that of your Exchange server, but should be under the same office network.

**On the Customer's system**

- Any Web browser
- Internet Connection

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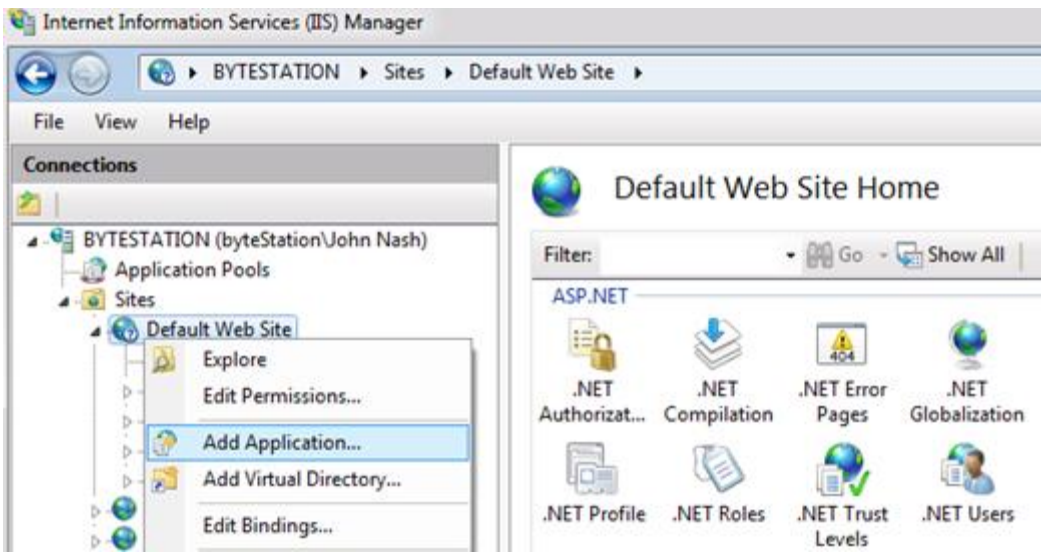
The followings list all the steps required to be performed to get CWS website running in few minutes.

**Step 1:** Setting up an Application under IIS
**Step 2:** Set appropriate network permission to the IIS shared folder
**Step 3:** Extract/Copy all Customer Web Access application files to the IIS web folder
**Step 4:** Set ASP.NET permission on Temp sub-folder
**Step 5:** Configure web Access specific settings in Team Helpdesk add-in
**Step 6:** Write/Update XML metadata files from Team Helpdesk for Outlook

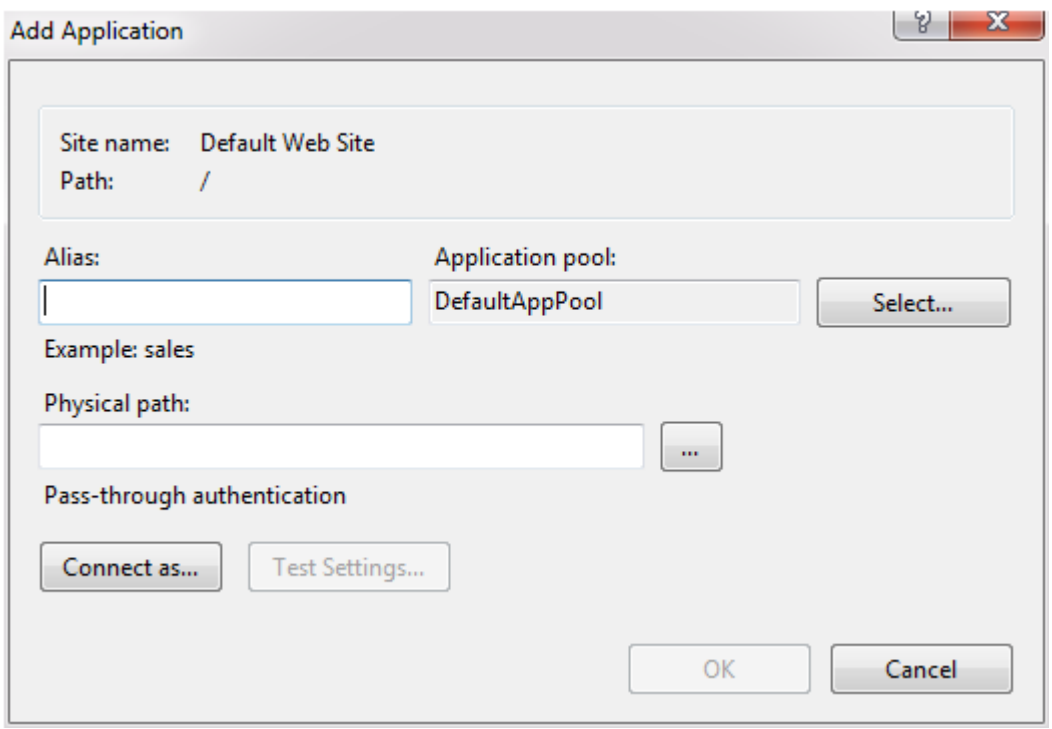
## Step 1: Setting up an Application under IIS

The first step in setting up the Customer Web Service (CWS) site requires creating a new application under your IIS server. In this document, we discuss the configuration of an application on your default web site under your IIS.

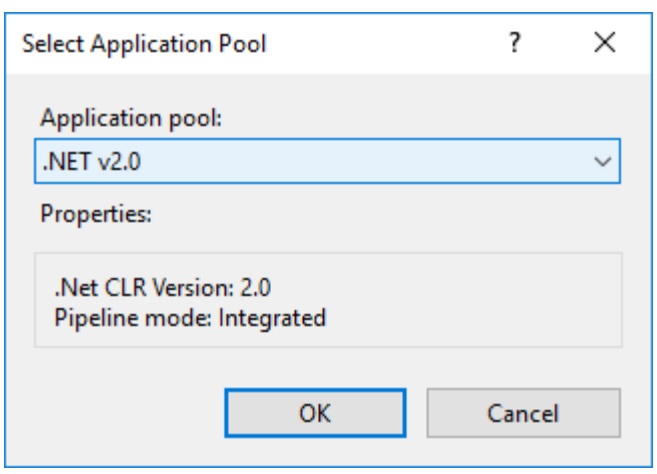
To create a new application, right-click the site and select '**Add Application…**'.



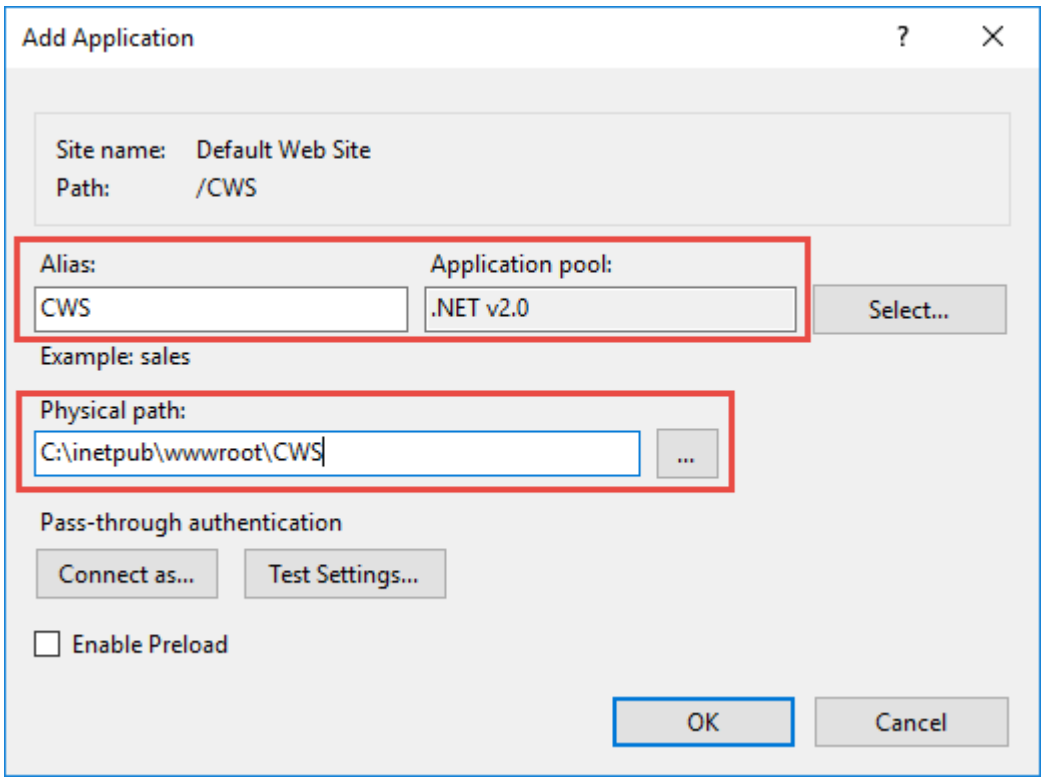

You will be prompted with the '**Add Application**' dialog box.



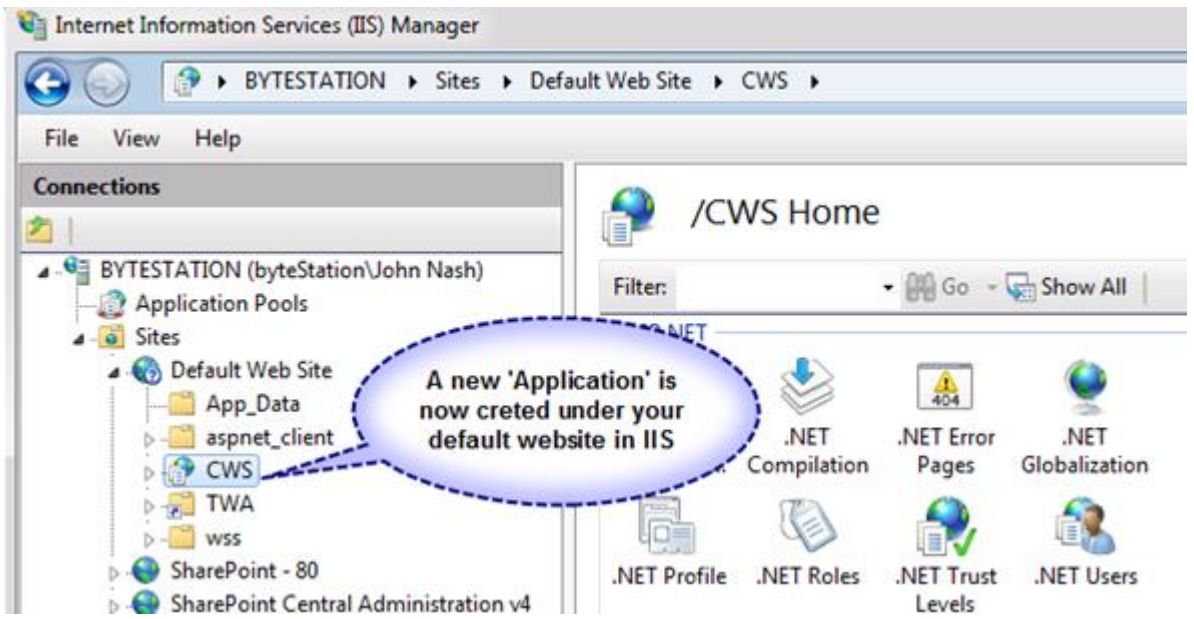

First, set the CWS application to use .NET CLR 2.0 application pool by clicking '**Select…**' button in the '**Application Pool**'.



Type the alias for the Application, say, CWS and specify the physical folder on the local server to map to this alias. In this case, the physical folder on the server is **C:\Inetpub\wwwwroot\CWS**



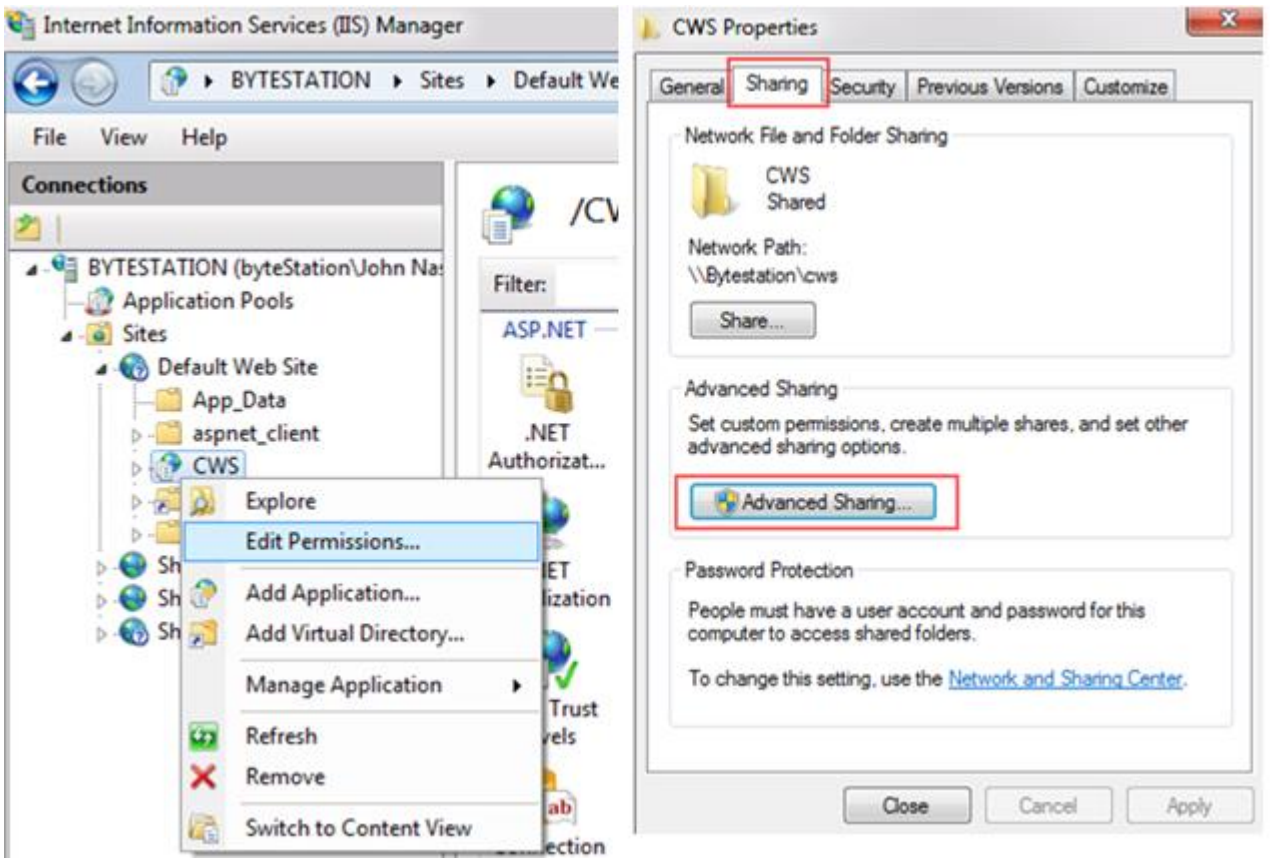

Click **OK**. The image below displays the result.



## Step 2: Set appropriate network permission to the shared folder

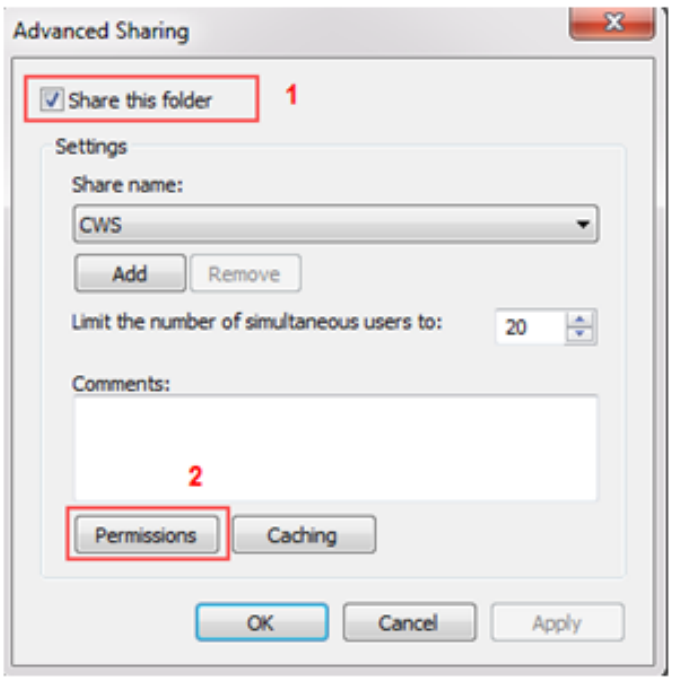
The just created 'CWS' IIS Application now needs to be set as a shared network folder for all the helpdesk technicians that uses Team Helpdesk for Outlook. Data interchange between the customer web access and the Team Helpdesk add-in in Outlook uses XML formats and are written to a temporary subfolder 'Temp' under the application folder. Due to this requirement, all helpdesk technicians working in Outlook will need to have full control over the 'CWS' network folder.

Right-click the CWS application from the tree view and click '**Edit Permissions…**'

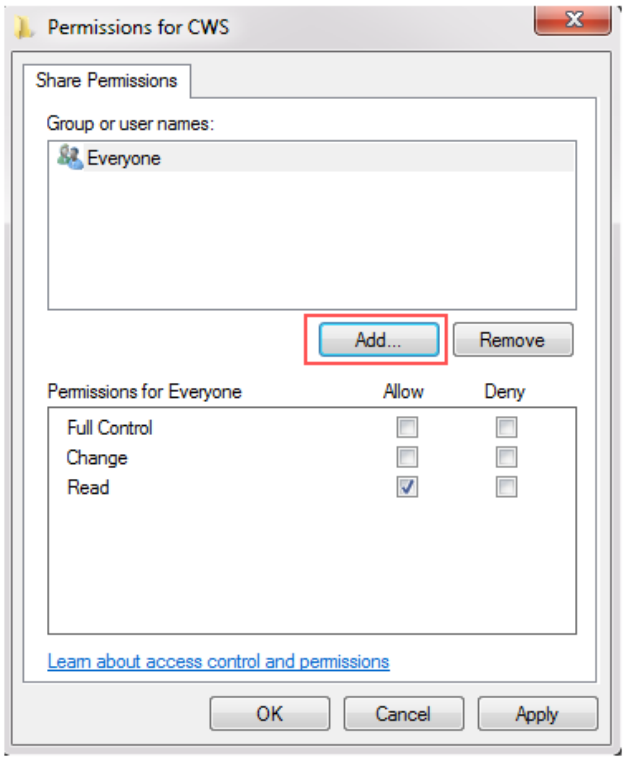



We need to grant full control to this folder (e.g. *C:\Inetpub\wwwroot\CWS*) in both Sharing and Security tabs. Let us start with the first one. Click the **Sharing tab > Advanced Sharing…**

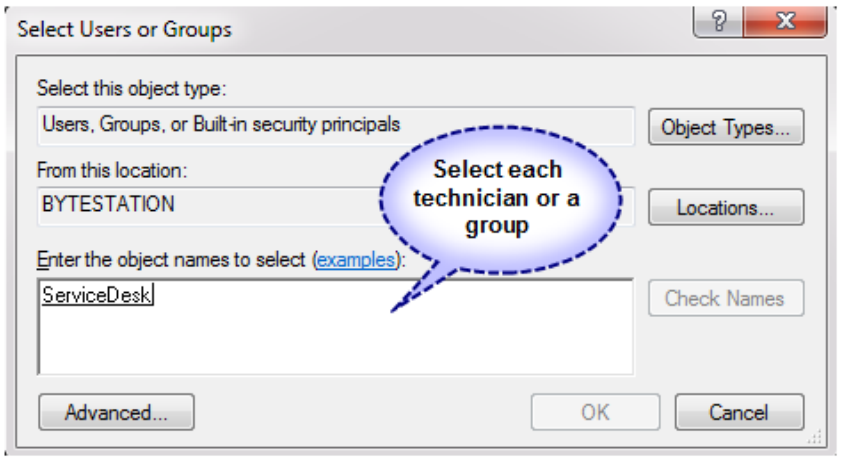
From the '**Advanced Sharing**' box, enable the option '**Share this folder**'.



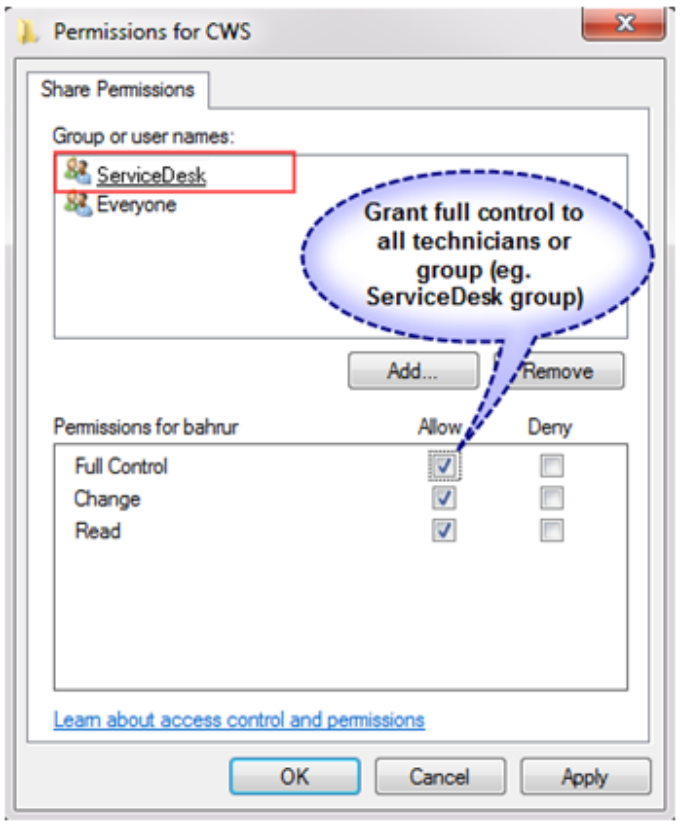

And then click '**Permissions**'.



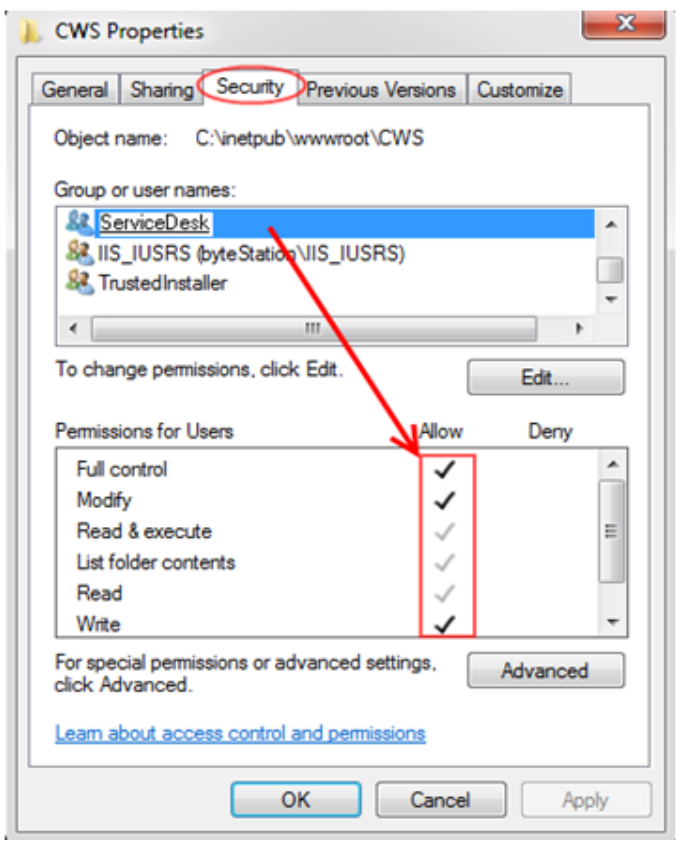
Once you are in the permissions dialog, you will see that by default, any users on the local network have read permission over the shared folder. For our needs, we need to allow all helpdesk users to save/update files under this folder. So, either you can add individual user or a group (if you have it defined).




In our example, we have defined a group *'ServiceDesk'* comprising of all helpdesk users so that setting permission for all users can be done in a single click. Check the option **'Full Control'** to allow all technicians in the helpdesk team to save/update 'Customer Web Service' specific metadata XML files.




Likewise, add the same helpdesk group (e.g. *ServiceDesk*) under the Security tab and grant **'Full Control'** access.



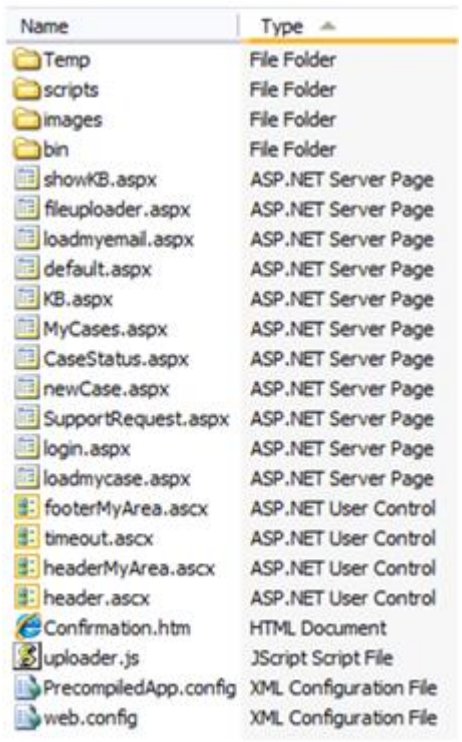
## Step 3: Extract all Customer Web Service (CWS) application files

Now that we have created an exclusive web-enabled physical folder on the server and granted full control to all helpdesk users (step 1 and 2 respectively), the next step is to extract all the files and subfolders from the Customer Web Service zip archive (e.g. CWS.zip) to the shared network IIS folder.

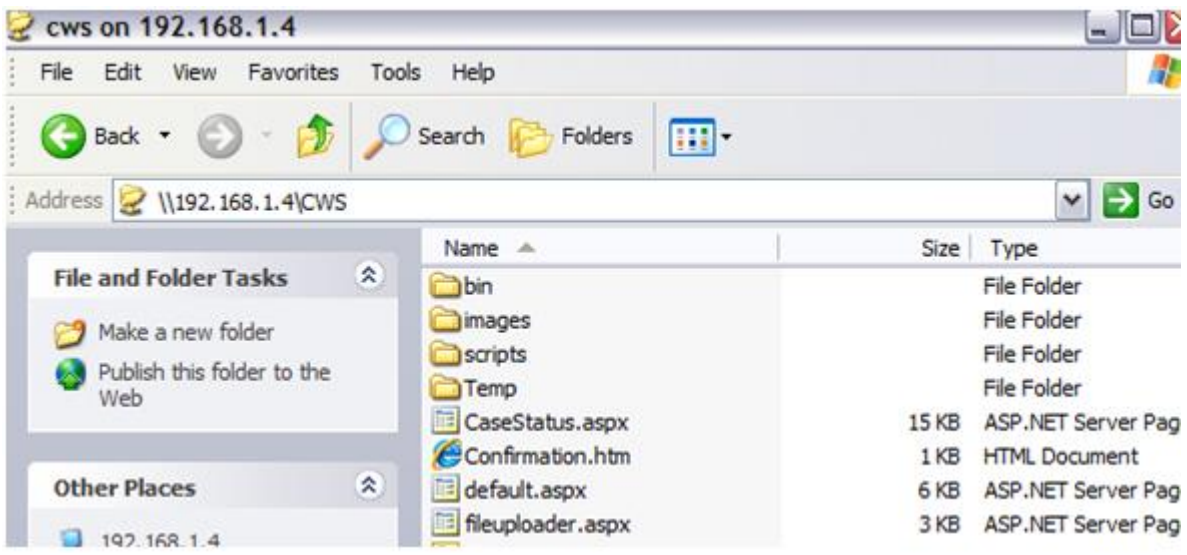
This CWS.zip is installed with Team Helpdesk Manager, and is located under the following folder in your system:

*C:\Users\USERNAME\AppData\Roaming\AssistMyTeam\Team Helpdesk Resources*

The contents of 'CWS.zip' are shown below:



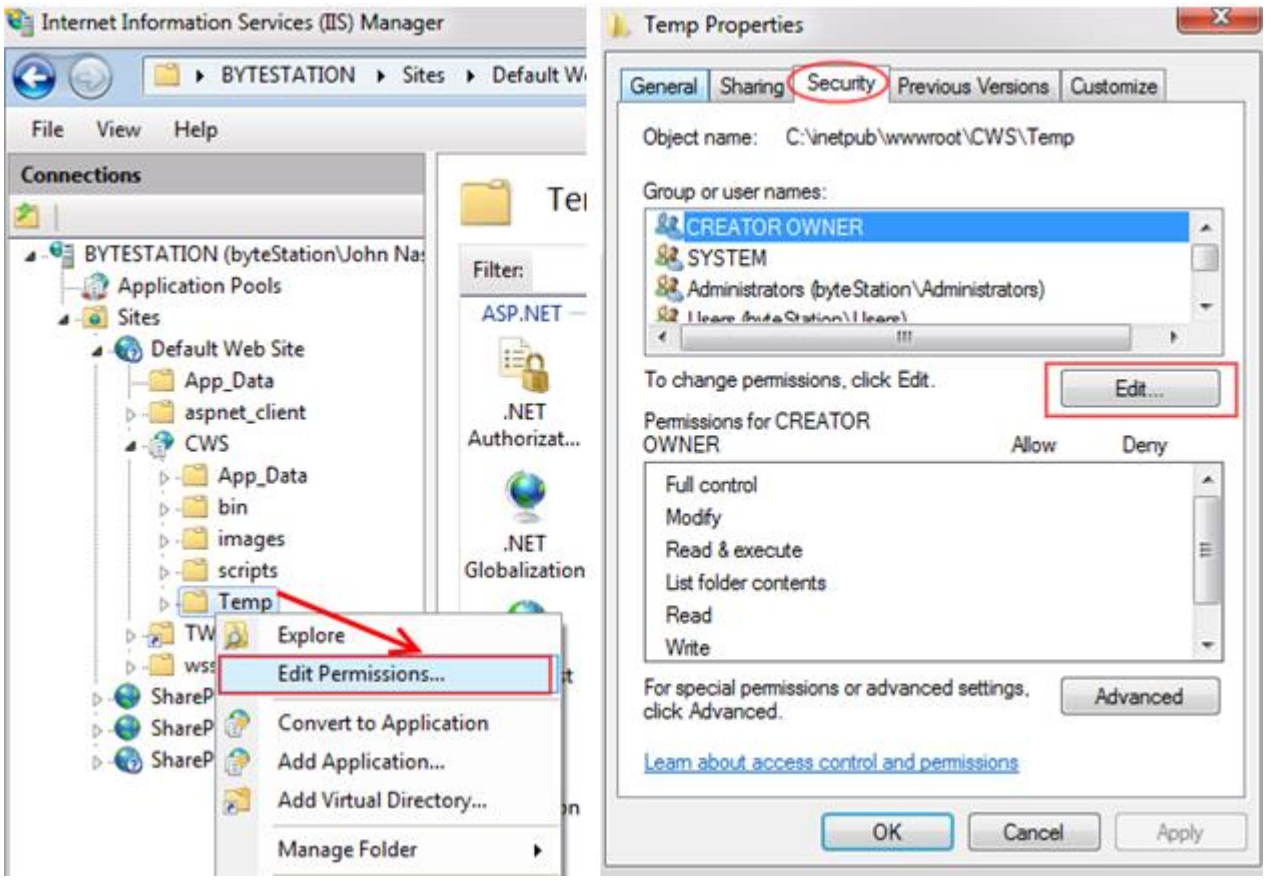

Extract all the files and subfolders under the zip (e.g. *CustomerWebService.zip*) file to the network shared web-enabled Customer Web Service (CWS) folder. For example, \\192.168.1.4\CWS where '192.168.1.4' is the windows server and 'CWS' being the web-enabled folder (either configured as a website or virtual directory under an existing website in IIS). If step 2, if the permission (e.g. full control) was successfully set, the files and subfolder would be extracted/copied to the network share.



## Step 4: Set ASP.NET (Internet Guest Account) permission on Temp folder.

The Customer Web Service functionality is built upon ASP.NET 2.0 and AJAX technology. Typically, an ASP.NET application requires read, execute, and list access for the ASP.NET account (also known as Internet Guest Account) for the web site root (for example: D:\inetpub\wwwroot\CWS or any alternative site directory you may have configured in IIS), the content directory and the application root directory in order to monitor for configuration file changes. The application root corresponds to the folder path associated with the application virtual directory in the IIS Administration tool.

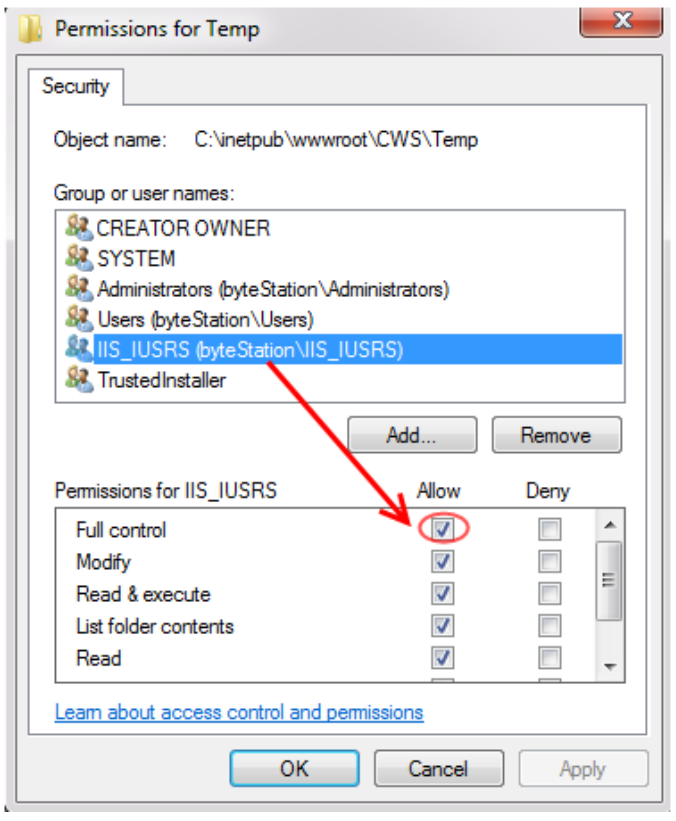
Under your IIS server, you have multiple subfolders under the CWS application. The special interest that we have now is for the **'Temp'** folder, as this is the folder that saves uploaded attachments from support request case temporarily. Hence, the ASP.NET account needs to be configured to have '**Full Control**' over this 'Temp' folder. You do that by right-clicking 'Temp' folder > '**Edit Permission…**'.




From the Temp properties dialog box, click the **'Security'** tab, and click the '**Edit…**' button to invoke the '**Permissions**' tab.

In the 'Permissions' dialog box, select the ASP.NET (Internet Guest) account. Different version of IIS has different ASP.NET account name. For example, in IIS version 5 (windows 2000 server), it is ASPNET, and in IIS version 6 (windows server 2003), it is IIS_WPG group whereas in IIS 7 and above version (Windows 7 and above), it is IIS_IUSRS group.

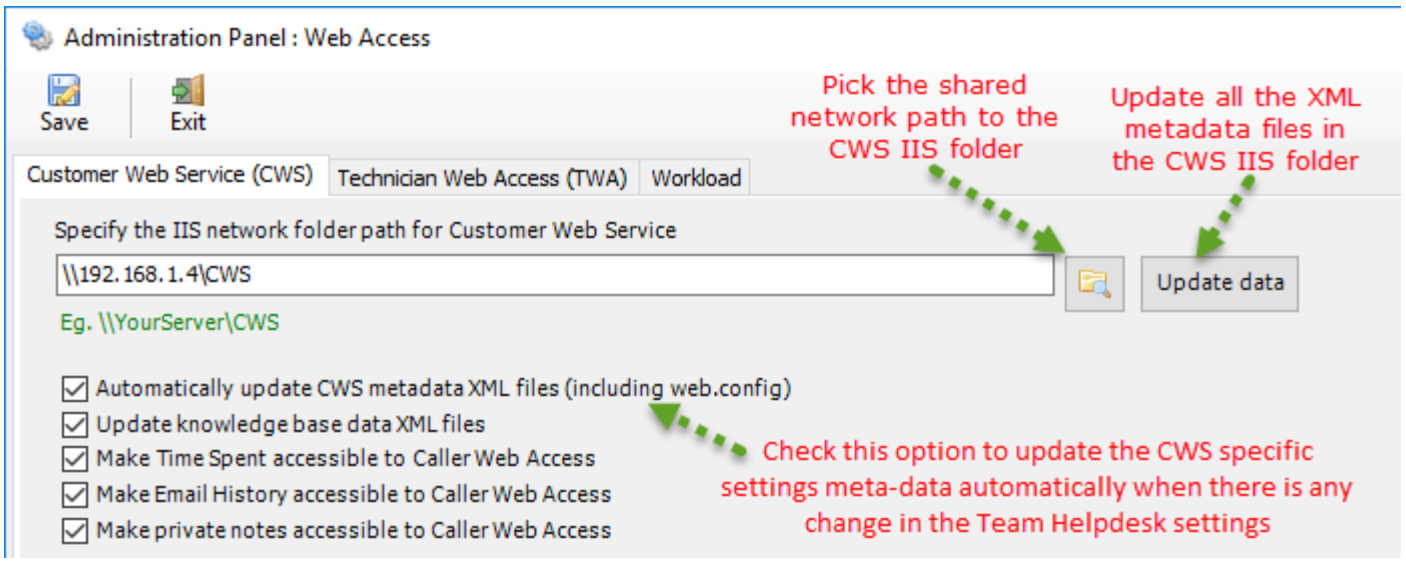
In the screenshot below, we have IIS 7 version and hence, the **IIS_IUSR** group is allowed **'Full Control'** over the **'Temp'** folder.



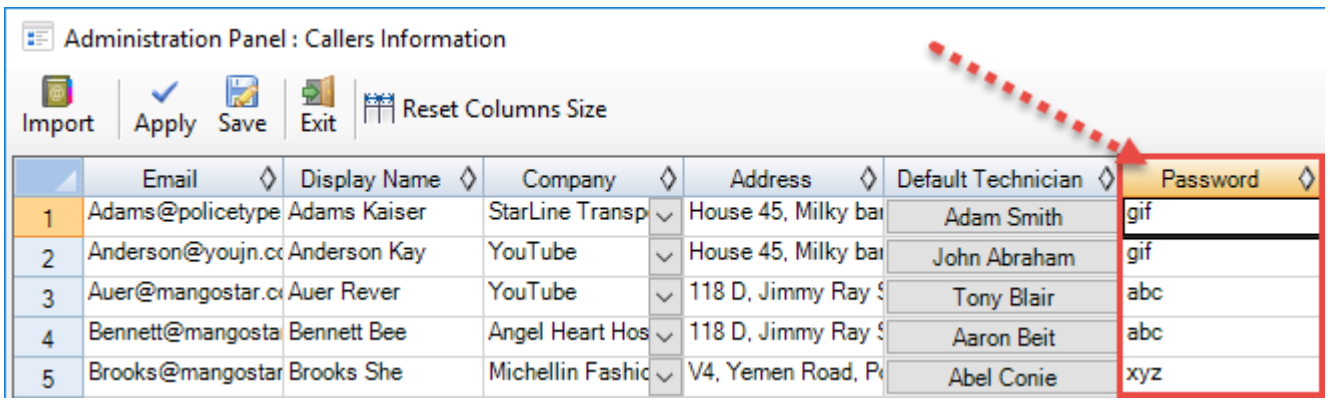
## Step 5: Configure CWS specific settings from Outlook

The Customer Web Service (CWS) site does not make use of a database to store the helpdesk settings and lists. Instead, the data and settings are stored as XML metadata files and are saved/updated from the Team Helpdesk add-in interface in Outlook (by helpdesk managers/technicians). The document takes you to finer detail on various web access settings that need to be configured in the administrative tool, before saving/updating the XML metadata files in the IIS folder.

Displayed below is a part of the Customer Web Service (CWS) settings dialog. To save/update the CWS specific XML metadata files from Outlook to the shared network web-enabled folder (on the server), it needs to know the full UNC folder path. If the network folder resource requires a network credential, then you will be prompted to enter one



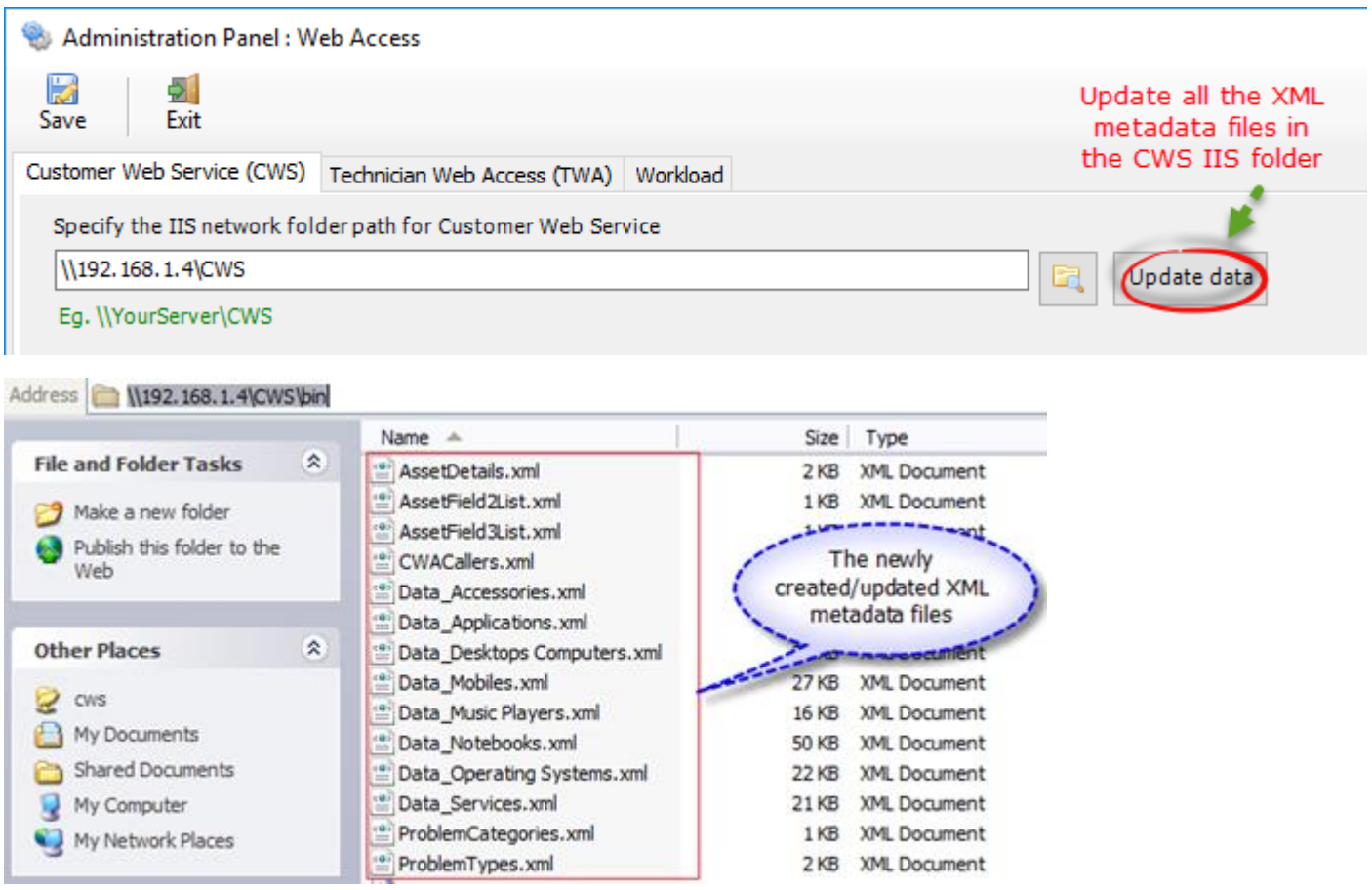

The Caller Web Access (CWA) site, which is a part of the Customer Web Service (CWS) site, requires a user credential for caller to access their support cases online. Helpdesk managers can define this credential (e.g. *password*) in the Team Helpdesk Callers list dialog. Alternatively, a random password can be generated automatically when a new caller is added to the Callers list.



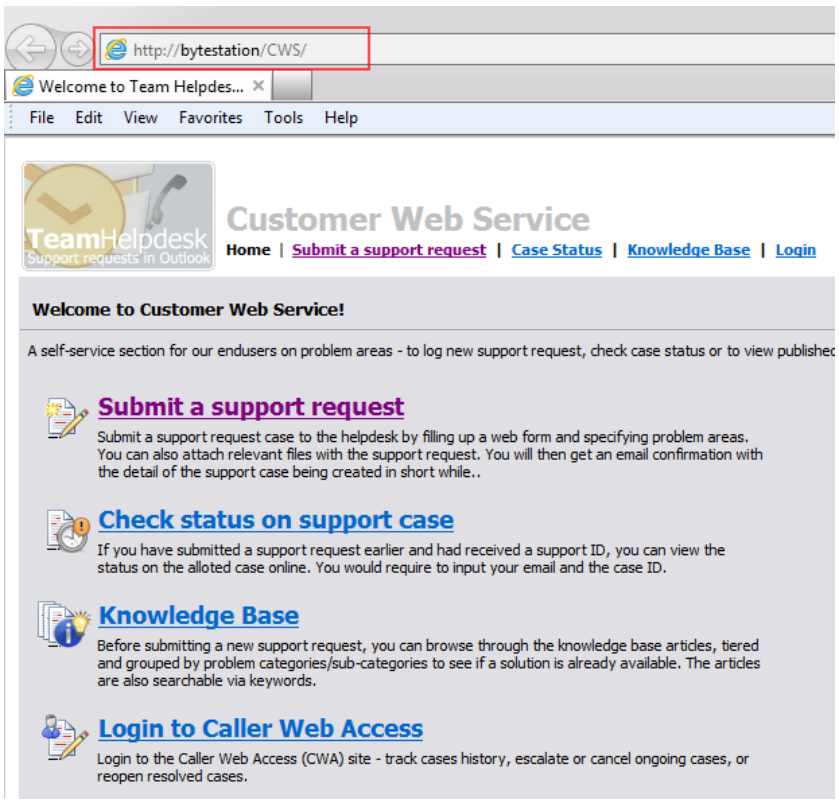
## Step 6: Write/Update XML metadata files from Outlook

The last remaining step is to save/update the Customer Web Service (CWS) specific XML metadata files in the CWS network web-folder. The XML metadata files contain the required Team Helpdesk lists and settings defined by the helpdesk manager in Outlook and these files feed data to the Customer Web Service applications when end-users submit new support requests via web-form or when caller login to load their support cases.

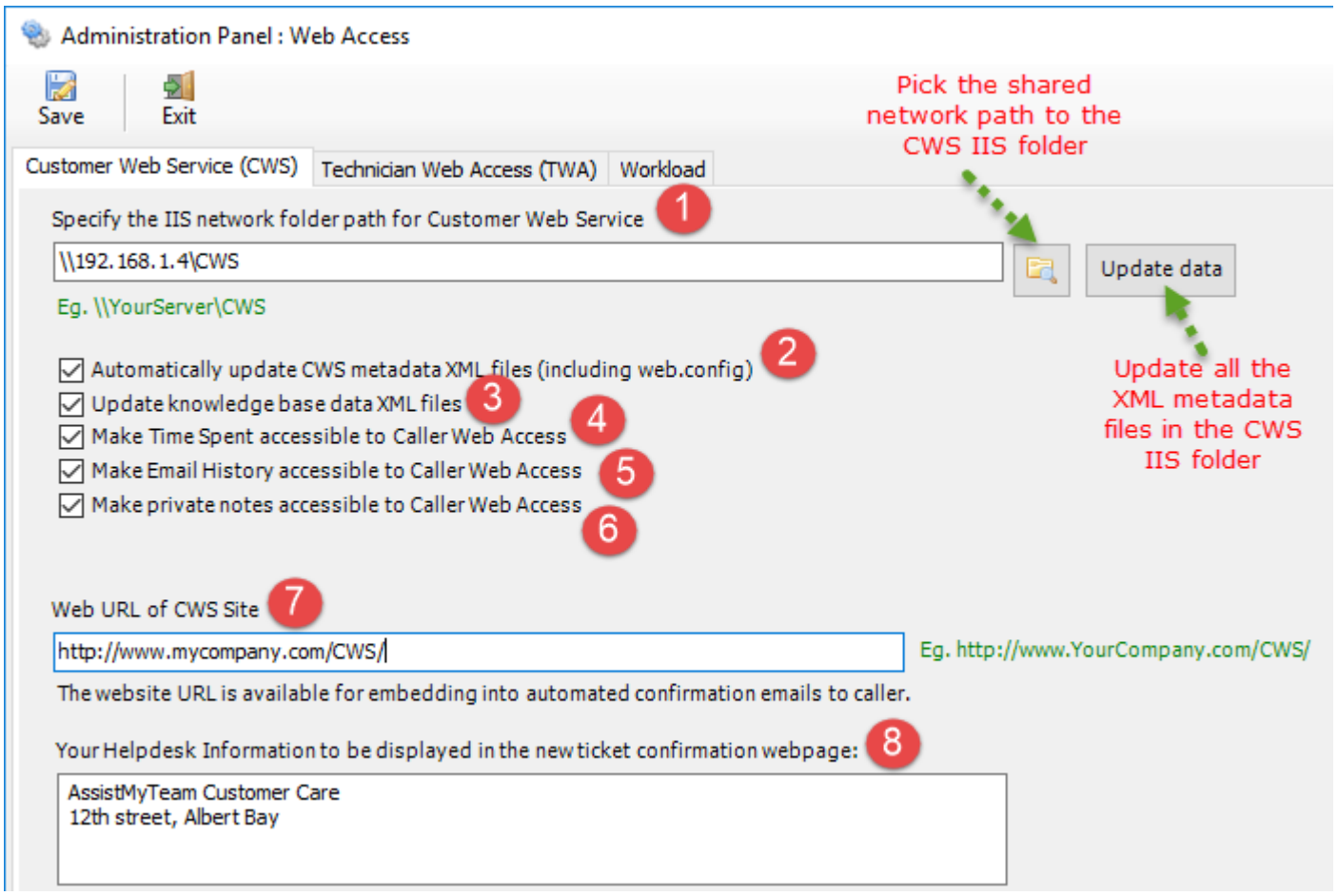
Before any XML data files can be updated, the helpdesk manager needs to specify the network share that was configured in Step 2. If the appropriate permission was set, clicking the **'Update data'** button generate all the required XML files.




Now, open your web browser and point to the CWS URL. Usually the URL is in the format **http://SERVER/CWS/.** For example, in our instance, it would be [http://byteStation/CWS/](http://byteStation/CWS/)



## CWS admin panel in Team Helpdesk Manager Add-in




1 Here, you need to specify the shared network path of the CWS folder (which is located in your IIS **C:\inetpub\wwwroot** parent folder on your windows server). To save/update the CWS specific XML metadata files from Outlook to the shared network web-enabled folder (on the server), it needs to know the full UNC folder path. If the network folder resource requires a network credential, then you will be prompted to enter one.

**NOTE:** You need to share this CWS folder such that all technicians can have access to it from their respective systems within the office network.

2 **Automatically update CWS metadata XML files (including web.config)**
Enable this option to allow helpdesk add-in to update the CWS specific settings metadata automatically when there is any change in the Team Helpdesk settings. The Team Helpdesk lists and settings (e.g. problem categories and types) would surely change/update in due time. The helpdesk manager would need to update the web service XML metadata files accordingly, so that data used in the web service application is in synch with that in Outlook. Though the helpdesk manager can manually update the data files for web service, it would be a tedious task if the settings in Outlook are to change every now and then. In such scenario, it is recommended to allow helpdesk add-in to automatically update CWS specific metadata XML files in the shared network folder, when there are any changes in the lists and settings in Outlook.

3 **Update Knowledge base data XML files**
Check this option to publish or update knowledge base data XML files in the web-enabled CWS network folder.

4 **Make the Time Spent accessible to Caller Web Access (CWA)**
Enable this option so that when callers are logon to the Caller Web Access site, they can see the time spent details entered by technicians in the cases allotted to them.

5 **Make Email History accessible to Caller Web Access**
Enable this option so that when callers are logon to the Caller Web Access site, they can see the Email communication history between them and the helpdesk in the cases allotted to them.

6 **Make private notes accessible to Caller Web Access**
Enable this option so that when callers are logon to the Caller Web Access site, they can see private notes entered by technicians in the cases allotted to them.

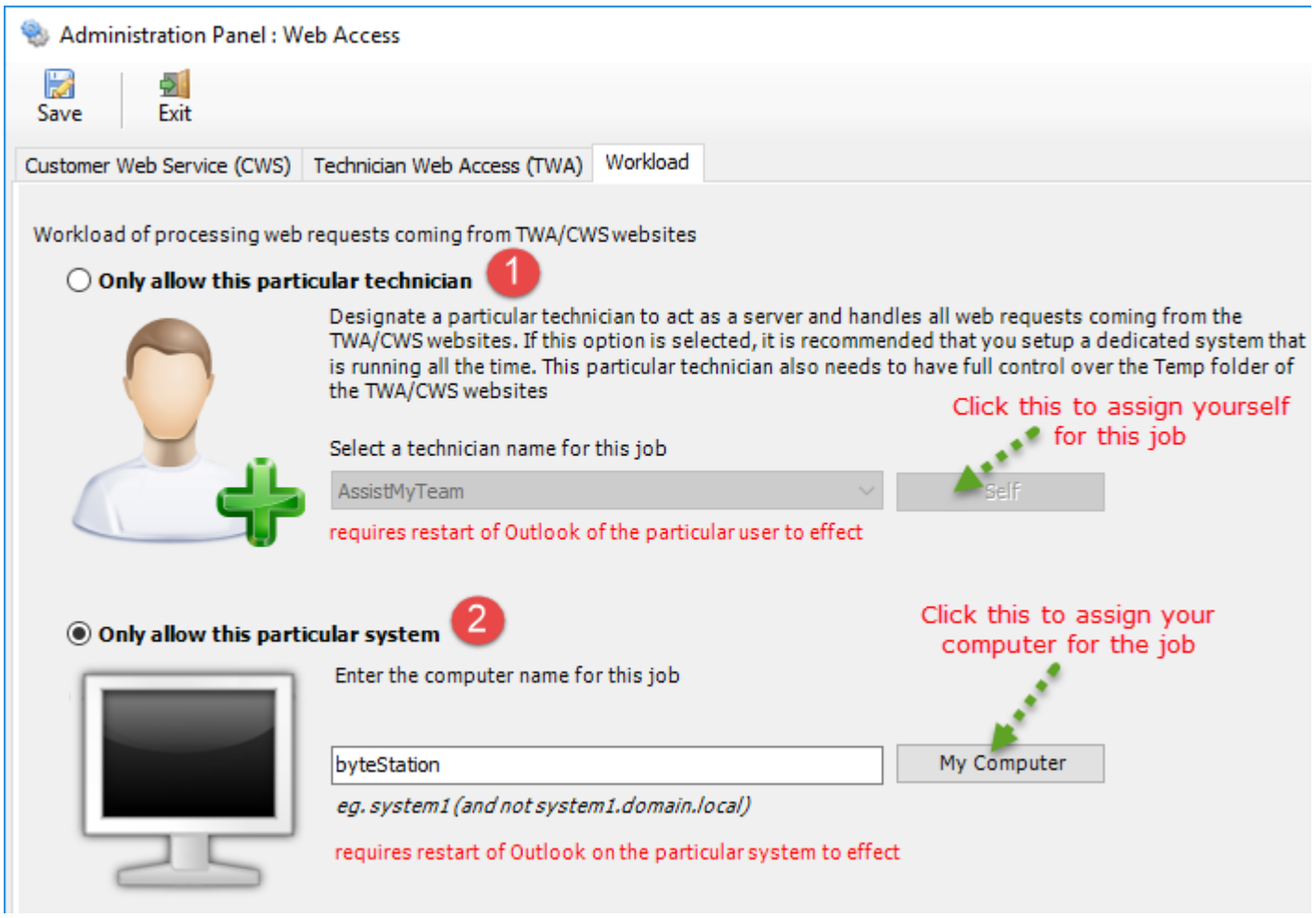
7 **Web URL of CWS site**
Enter the full web friendly URL (e.g. http://www.yourcompany.com/CWS/) that is accessible by your customers from the Internet or Intranet. What you entered here will be available for embedding into email template (i.e., Placeholder variable **SCO_WEBACCESS_URL)** which would be then sent to the customer after a case is raised from their support request email or call.

8 Enter the confirmation information from the helpdesk to be displayed in the webpage of CWS when a new case is submitted successfully by a customer through the webform.

***Caller Web Access (CWA)** - is a part of the Customer Web Service (CWS) site, requires a user credential for caller to access their support cases online. Helpdesk managers can define this credential (e.g. password) in the Team Helpdesk Callers list dialog. Alternatively, a random password can be generated automatically when a new caller is added to the Callers list.

## Workload – Assign responsibility for Web Access Servicing

In Team Helpdesk, you need to specify which helpdesk manager add-in would be responsible for monitoring and servicing all the web requests coming from the Customer Web Service (CWS) and Technicians Web Access (TWA) websites. You can choose a particular technician or a dedicated system (that has the manager installed) for this automation job.




1 Choose this option to assign a particular technician whose helpdesk manager add-in will be responsible for servicing all web requests from CWS and TWA websites (if configured).

**NOTE:** If you want to set yourself, just click the '**Self**' button (located on the right)

2 Choose this option to assign a dedicated system that has helpdesk manager add-in installed as responsible for servicing all web requests coming from CWS and TWA websites. Enter the computer name without the domain information. For example, if the full qualified system name is *system1.domain.local* only enter '**system1**'.

**NOTE:** If you want to set your current system, just click the '**My Computer**' button (located on the right)