

Technicians Web Access

Install Guide



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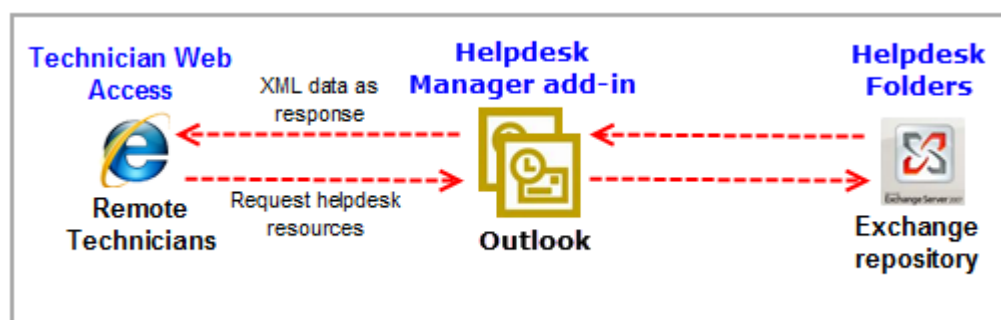


Technicians Web Access site (TWA)

The Technician Web Access (TWA) site is an AJAX enabled ASP.NET 2.0 application and provides a rich set of tools and interactivity with the live data in the exchange folder. Unlike other traditional web-based helpdesks, TWA site in Team Helpdesk does not require a dedicated database. Instead, the support cases data are sourced from your 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 TWA 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.

The idea behind the TWA is not to substitute the Team Helpdesk add-in functionality, rather it is to complement the support of a web interface from where remote technicians that do not have access to the MS Exchange resource, can easily work on support cases, thereby not handicapping the helpdesk operation, when some technicians are offsite.



Technicians with valid web access rights will be prompted to enter user credential when logging in to the TWA website. The password required here is defined by the helpdesk managers for each technician in the Team Helpdesk technician list. Apart from the password, helpdesk managers also can also specify if a particular technician can login to the TWA, by toggling the 'admin access' switch for each technician.

Once logged in, the technician will be taken to the 'Member' section where he/she can decide what to perform in the TWA web interface.

That is, either, each technician can choose to access only their cases, or load other cases based on criteria such as case ID, technician name, caller etc.

Technician can also choose to create a new support request case that will be submitted to Team Helpdesk add-in on Outlook for further processing and storing the support case in the exchange folders.



Configure Technician Web Access (TWA) site in IIS

Before remote technicians can start using Technician Web Access (TWA), 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 setup and use Technician Web Access (TWA), the followings list the requirements on both the web server and the client system.

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 TWA IIS folder

Note: As there is no direct interfacing between the TWA 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
-

The followings list all the steps required to be performed to get TWA 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 files of Technician Web Access 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](#)

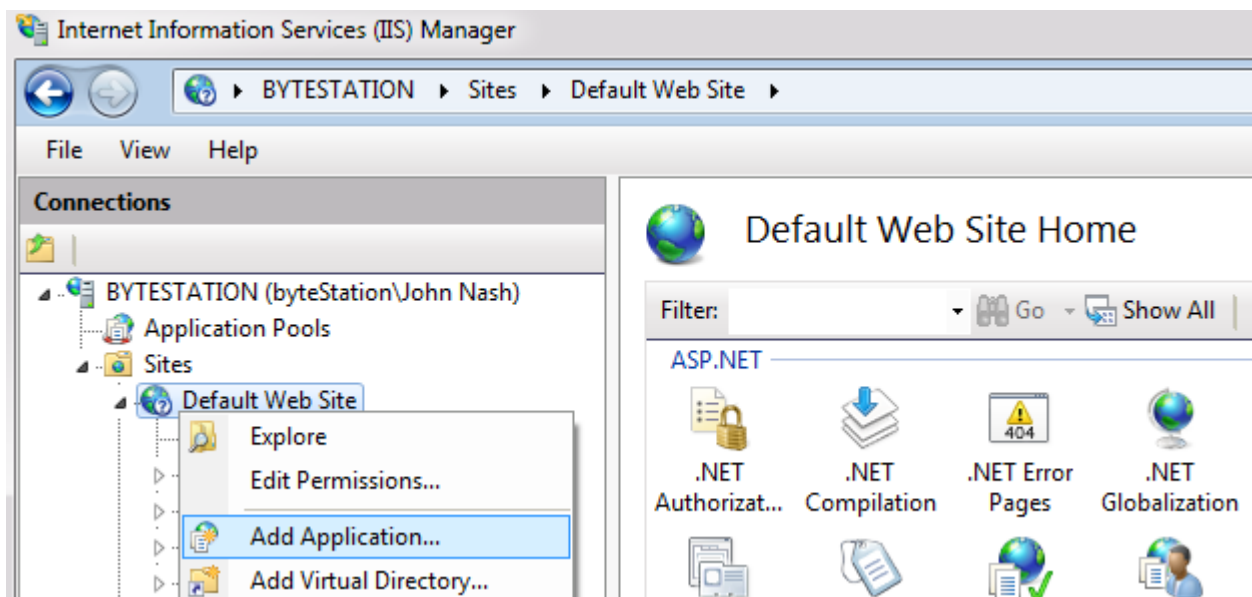
Step 6: [Write/Update XML metadata files from Team Helpdesk for Outlook](#)



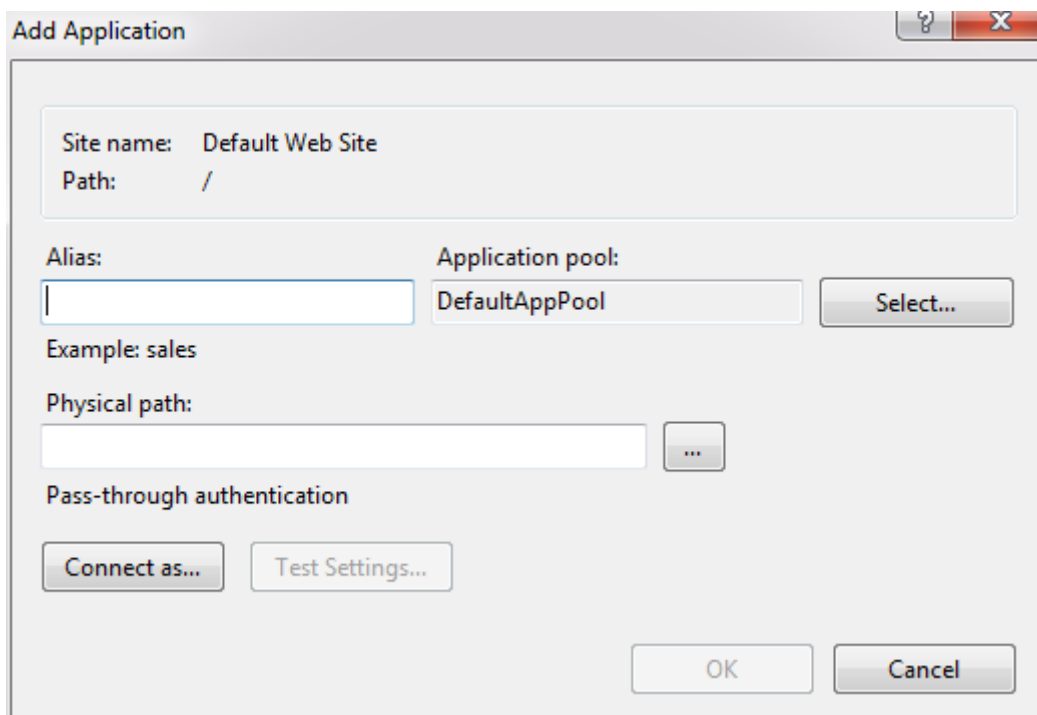
Step 1: Setting up an Application under IIS

The first step in setting up the Technician Web Access (TWA) 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.

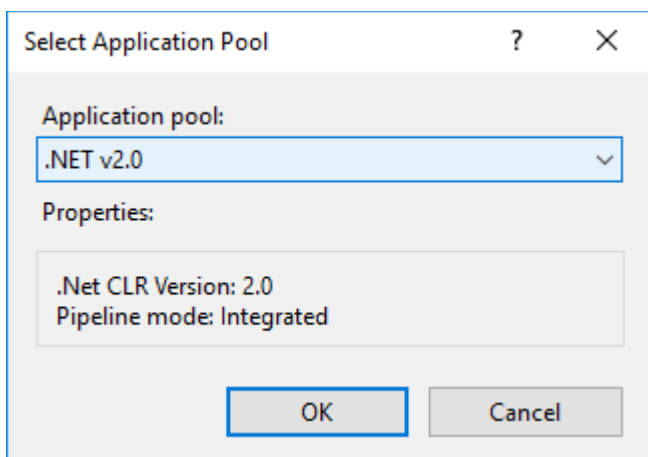
To create a new application, right-click the site and select **'Add Application...'**.



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

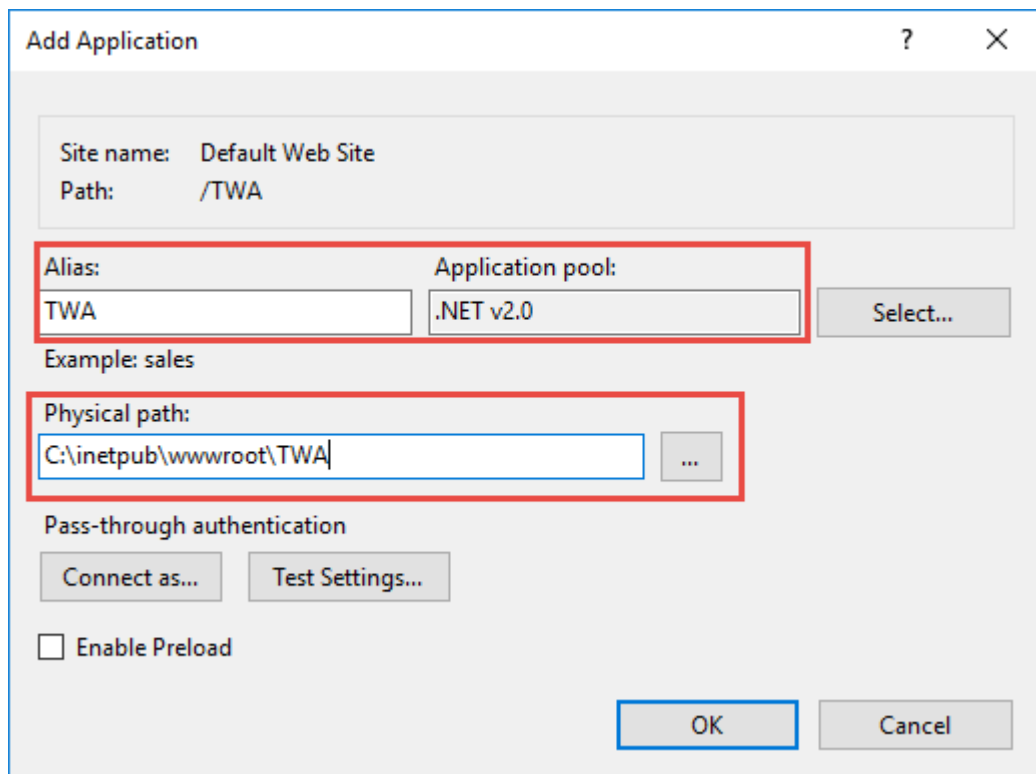


First, set the TWA application to use .NET CLR 2.0 application pool by clicking **'Select...'** button in the **'Application Pool'**.

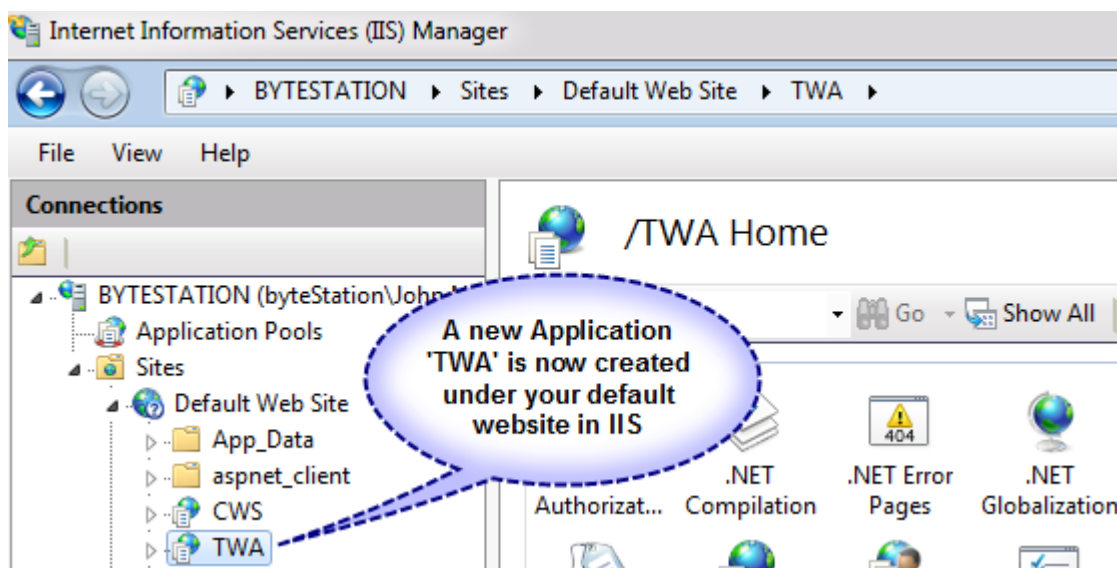




Type the alias for the Application, say, TWA and specify the physical folder on the local server to map to this alias. In this case, the physical folder on the server is `C:\inetpub\wwwroot\TWA`.



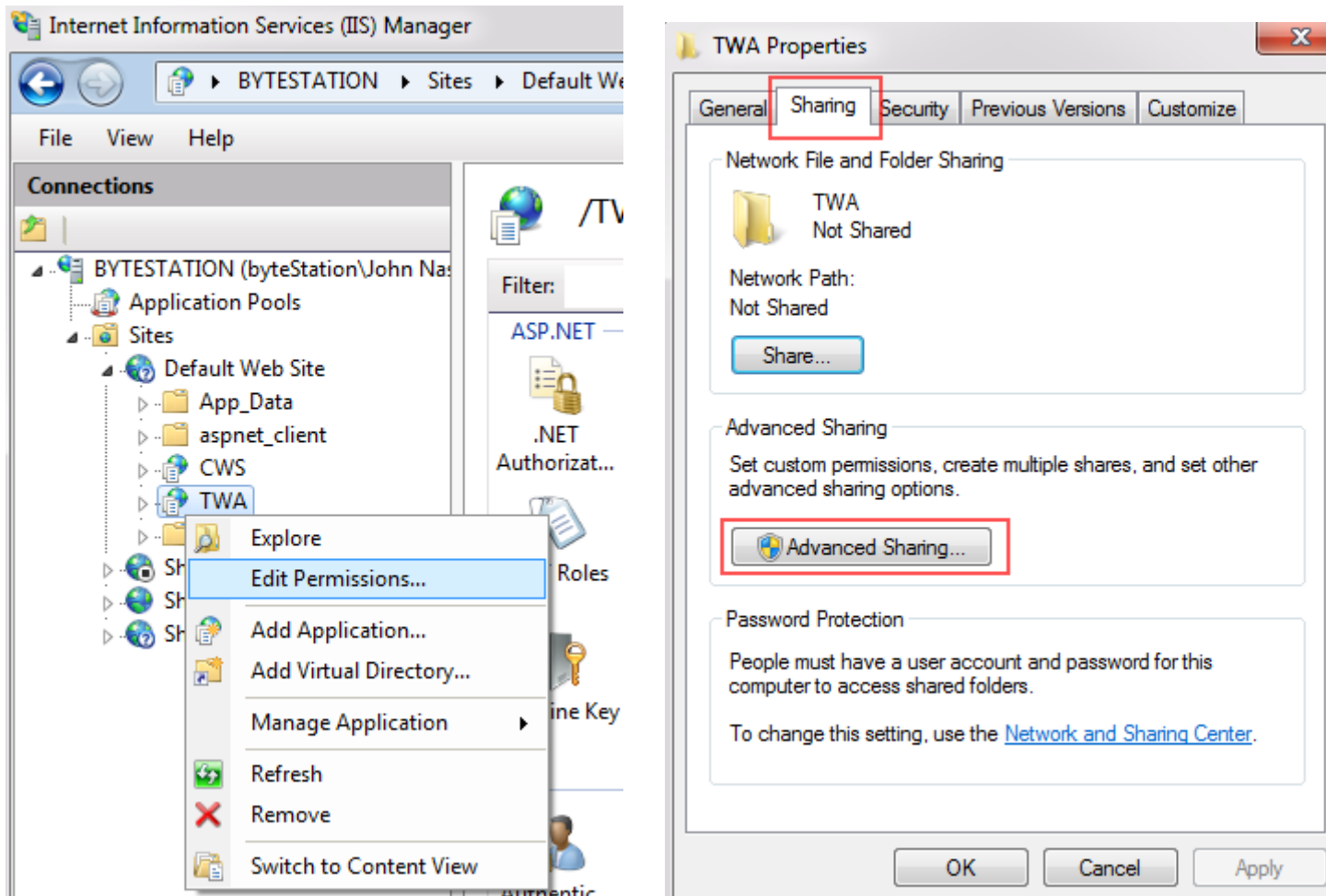
Click **OK**. The image below displays the result.





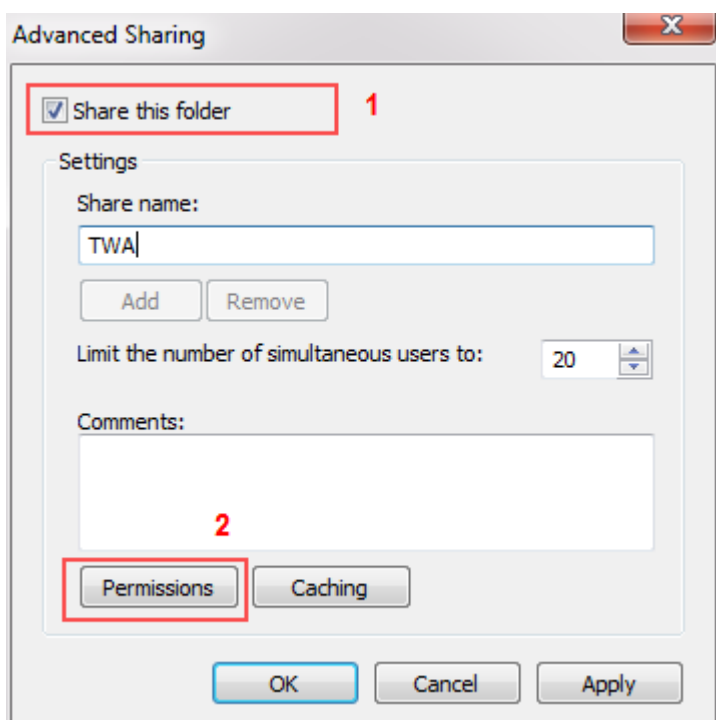
Step 2: Set appropriate network permission to the shared folder

The just created 'TWA' 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 Technician web access (TWA) 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 'TWA' network folder. Right-click the TWA application from the tree view and click '**Edit Permissions...**'



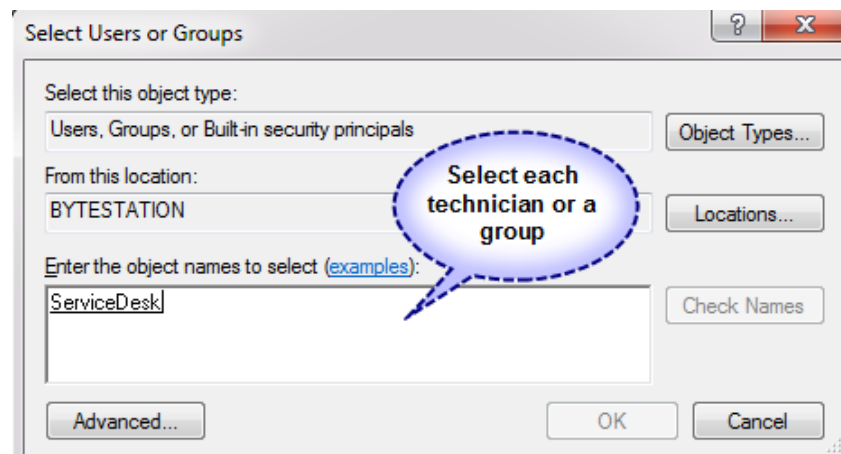
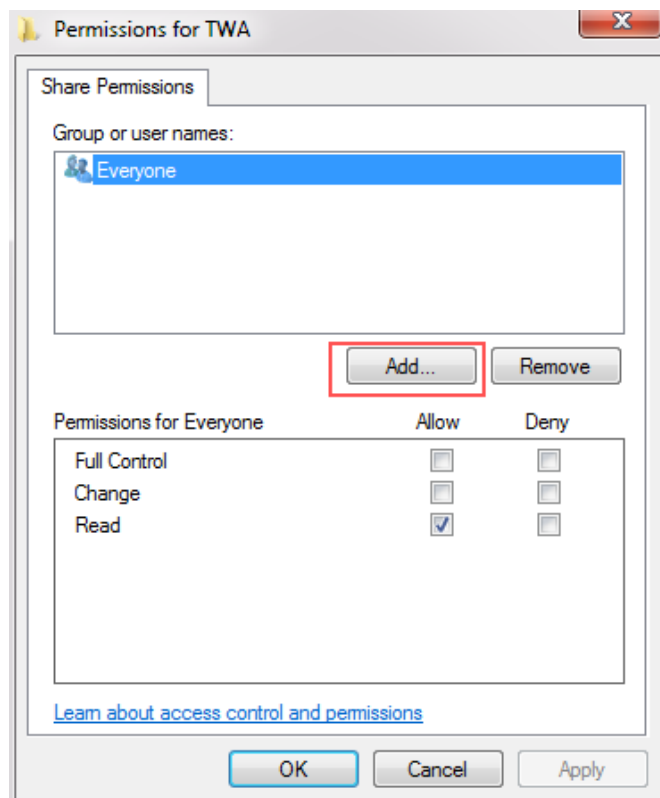
We need to grant full control to this folder (e.g. `C:\inetpub\wwwroot\TWA`) in both Sharing and Security tabs. Let us start with the first one. Click the **Sharing tab > Advanced Sharing...**

From the '**Advanced Sharing**' box, enable the option '**Share this folder**'. And then click '**Permissions**'.

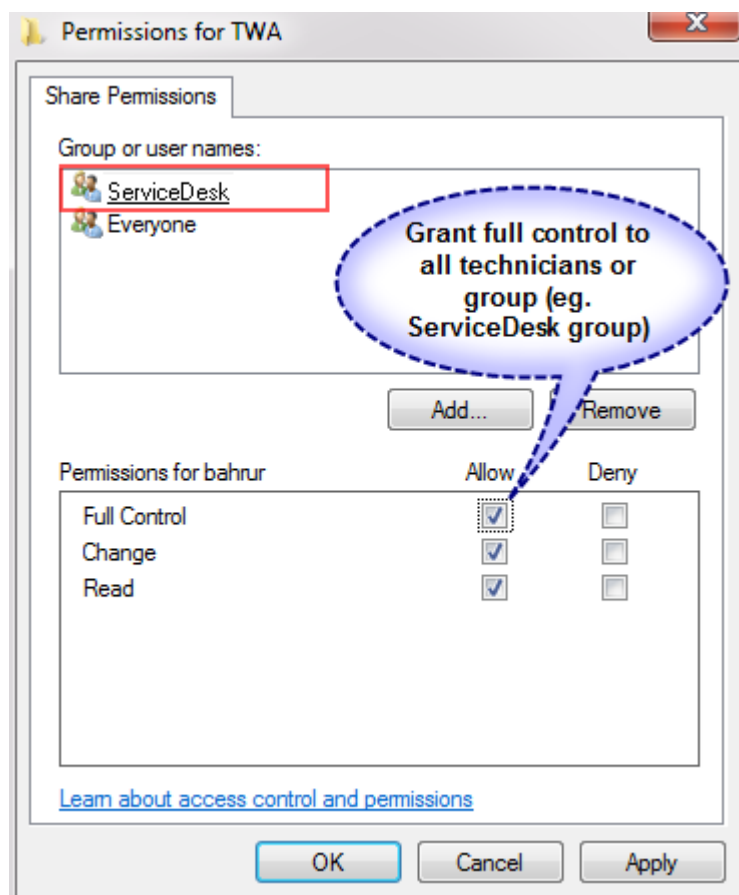




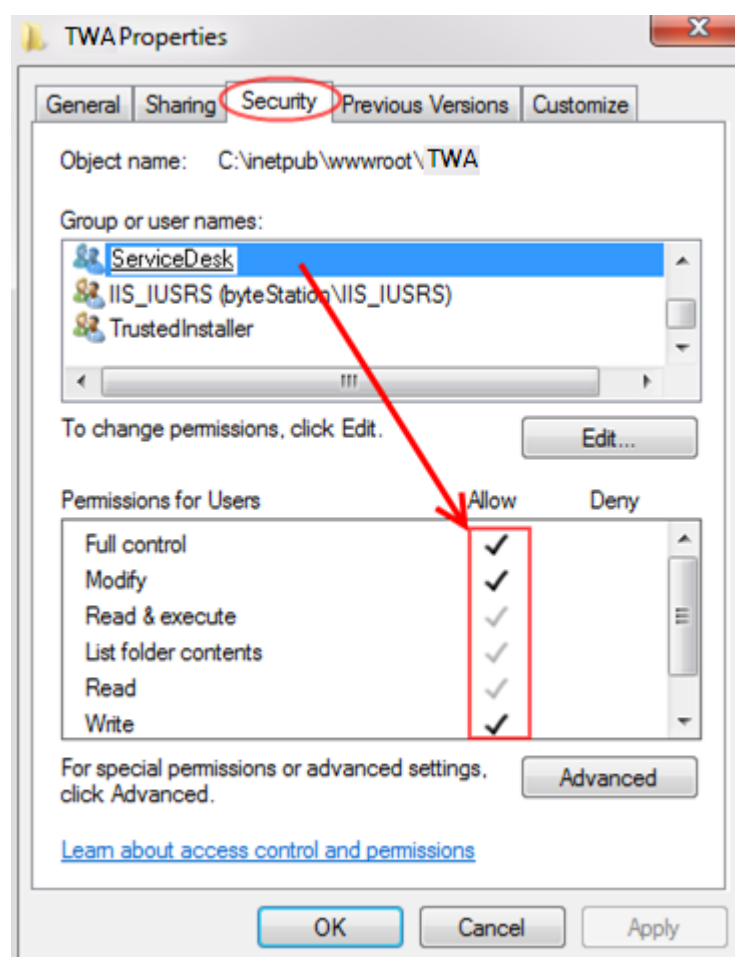
Once you are in the permissions dialog, you will see that by default, any users on the local network have read permission over the shared folder. For our needs, we need to allow all helpdesk users to save/update files under this folder. So, either you can add individual user or a group (if you have it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

This TWA.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 'TWA.zip' are shown below:

bin	
images	
scripts	
Temp	
confirmation.aspx	5,466
default.aspx	5,044
fileuploader.aspx	2,927
loadcase.aspx	73,227
loademail.aspx	19,487
login.aspx	15,607
mycases.aspx	10,170
newcase.aspx	38,169
othercases.aspx	13,523
footer.ascx	970
header.ascx	3,283
timeout.ascx	1,587
uploader.js	5,530
PrecompiledApp.config	49
web.config	5,468

Extract all the files and subfolders under the zip (e.g. TechnicianWebAccess.zip) file to the network shared web-enabled Technician Web Access (TWA) folder. For example, \\192.168.1.4\TWA where '192.168.1.4' is the windows server and 'TWA' 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.

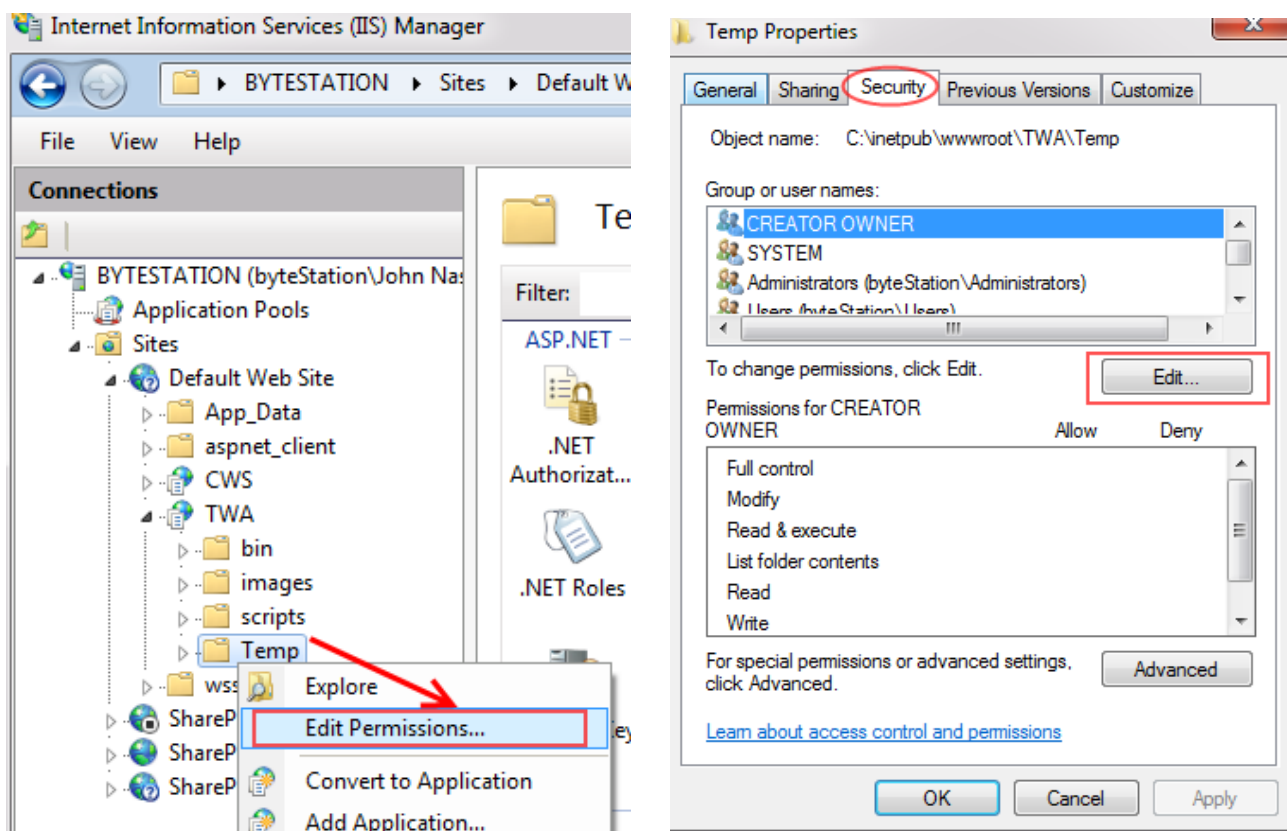
Name	Size	Type
bin		File Folder
images		File Folder
scripts		File Folder
Temp		File Folder
confirmation.aspx	6 KB	ASP.NET Server Pa
default.aspx	5 KB	ASP.NET Server Pa
fileuploader.aspx	3 KB	ASP.NET Server Pa
loadcase.aspx	72 KB	ASP.NET Server Pa
loademail.aspx	20 KB	ASP.NET Server Pa
login.aspx	16 KB	ASP.NET Server Pa
mycases.aspx	10 KB	ASP.NET Server Pa
newcase.aspx	38 KB	ASP.NET Server Pa
othercases.aspx	14 KB	ASP.NET Server Pa
footer.ascx	1 KB	ASP.NET User Cont



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

The Technician Web Access 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\TWA 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.

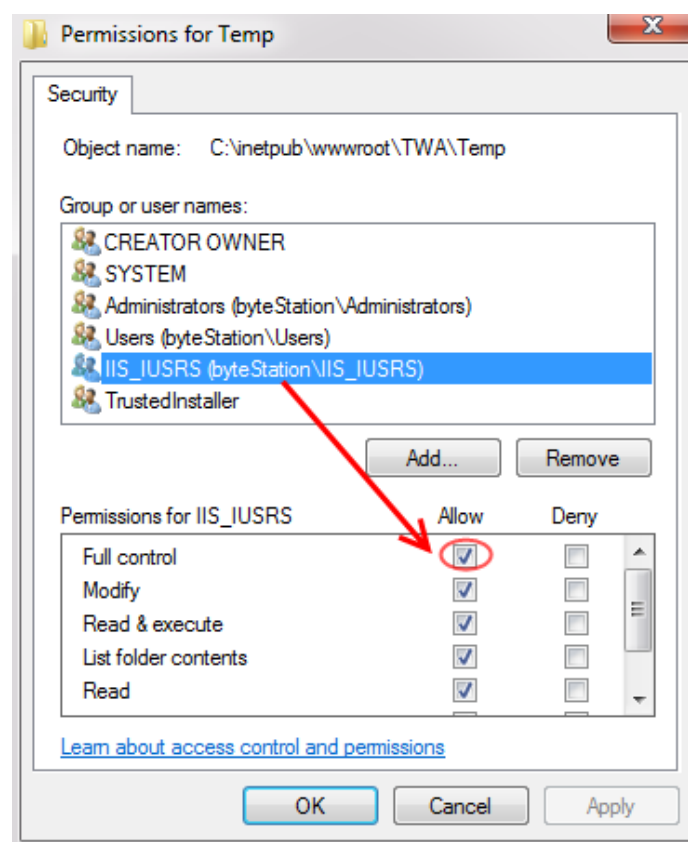
Under your IIS server, you have multiple subfolders under the TWA application. The special interest that we have now is for the 'Temp' folder, as this is the folder that saves uploaded attachments from support request case temporarily. Hence, the ASP.NET account needs to be configured to have full control 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 or above version, it is IIS_IUSRS group.

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





Step 5: Configure TWA specific settings from Outlook

The Technician Web Access (TWA) 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.

Define password for each technician for web access: Open up the *Team Helpdesk Manager* menu > 'Technicians list' panel and for each technician, define a password to enable individual technician to login to Technician Web Access on the web using the technician's email ID and password.

Administration Panel : Technicians Information

Import Apply Save Exit Reset Columns Size

	Name	Email	Hourly Rate	Phone	Mobile	Admin Access	Password
1	Aaron Beit	aaron.beit@someXYZcompar	\$4.00	3058300	6543454644	<input type="checkbox"/>	abc
2	Abel Conie	abel.conie@someXYZcompa	\$6.00	3058301	6543454645	<input type="checkbox"/>	def
3	Abu Hakim	abu.hakim@someXYZcompa	\$5.00	3058326	6543454684	<input checked="" type="checkbox"/>	abc
4	Adam Smith	adam.smith@someXYZcomp	\$8.00	3058303	6543454647	<input type="checkbox"/>	def
5	Adrien Silva	adrien.silva@someXYZcomp	\$3.00	3058304	6543454648	<input type="checkbox"/>	abc
6	Albert Souza	albert.souza@someXYZcomp	\$4.00	3058305	6543454649	<input type="checkbox"/>	abc

There is an exclusive web access setting dialog, which is displayed above. To save/update the 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.

Administration Panel : Web Access

Save Exit

Customer Web Service (CWS) Technician Web Access (TWA) Workload

Specify the IIS network folder path for Technician Web Access

\\192.168.1.4\TWA

Eg. \\YourServer\TWA

Automatically update TWA metadata XML files (including web.config)

Update data

Pick the shared network path to the TWA IIS folder

Update all the XML metadata files in the TWA IIS folder

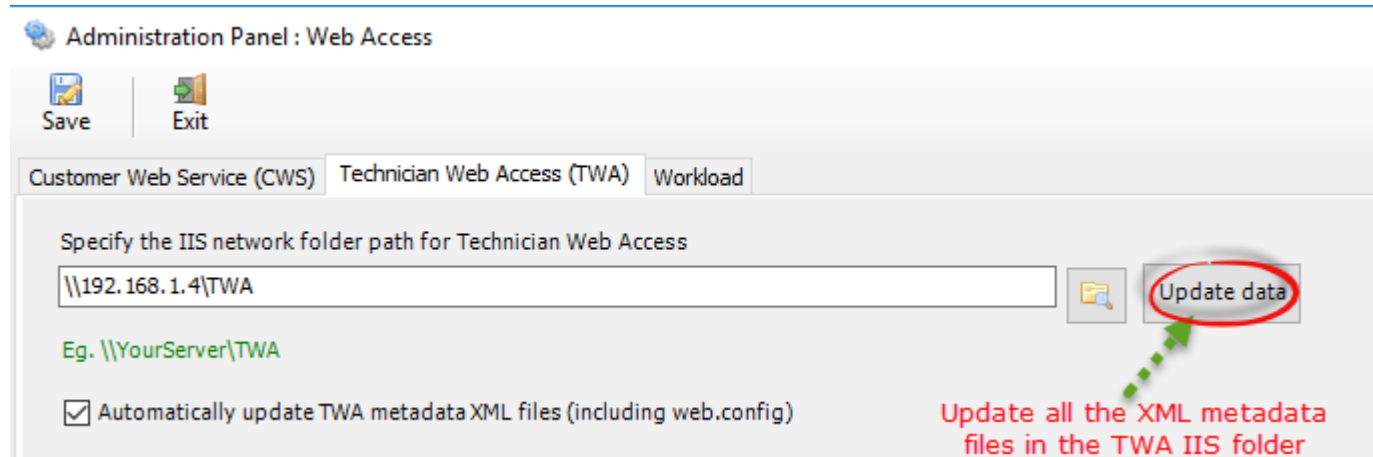
Check this option to update the TWA specific settings meta-data automatically when there is any change in the Team Helpdesk settings



Step 6: Write/Update XML metadata files from Outlook

The last remaining step is to save/update the Technician Web Access (TWA) specific XML metadata files in the TWA 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 Technician Web Access applications when end-users submit new support requests via web-form or when technician login to load their assigned cases.

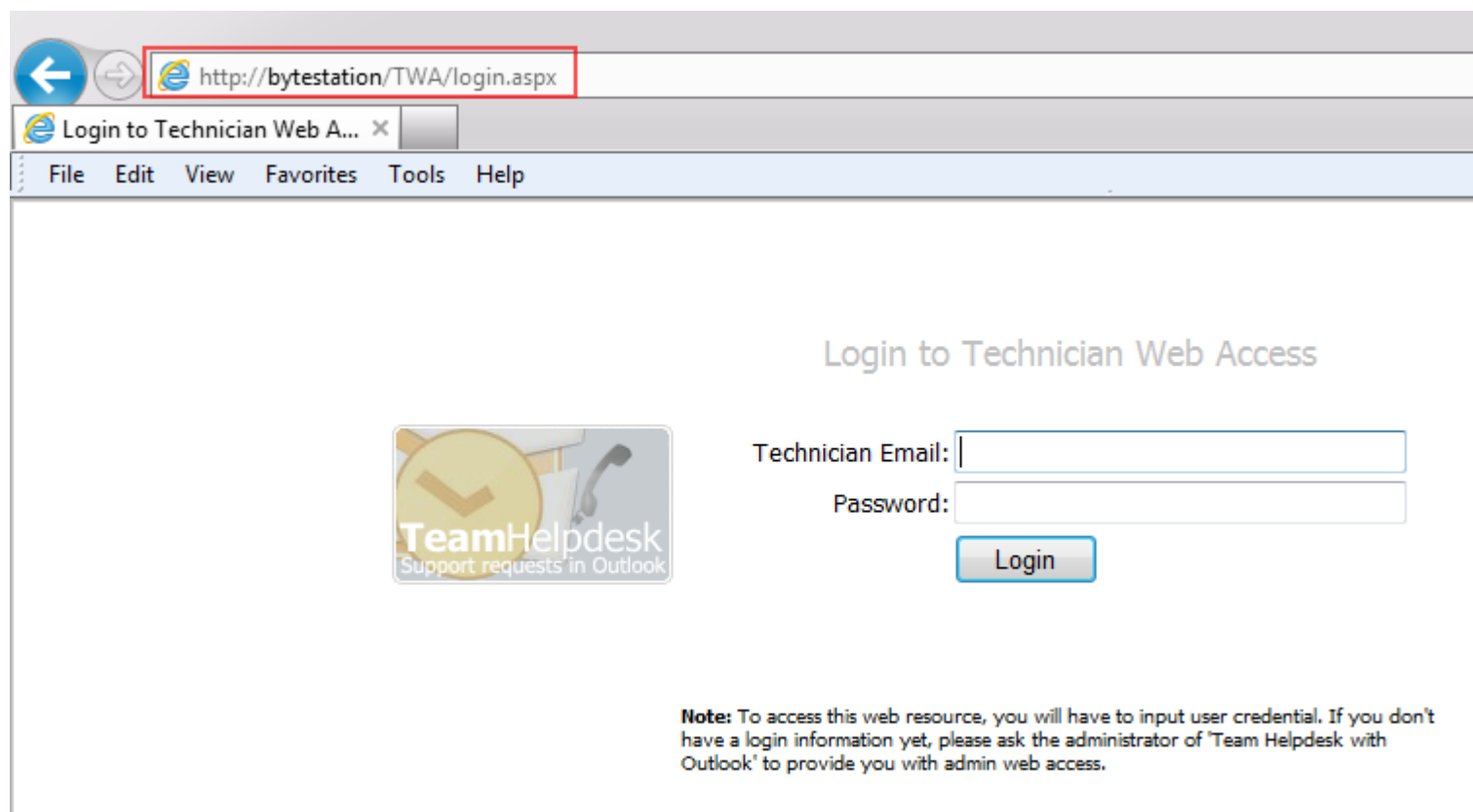
Before any XML data files can be updated, the helpdesk manager needs to specify the network share that was configured in Step 2. If the appropriate permission was set, clicking the **'Update data'** button generate all the required XML files.



Automatically update TWA metadata XML files (including web.config): In due course, the Team Helpdesk lists and settings would change/update (e.g. problem categories and types). This requires the helpdesk manager to manually update the web access XML metadata files accordingly (by clicking the **'Update data'**), so that data used in the web access application is in synch with that in Outlook. Though the helpdesk manager can manually update the data files for web access, 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 Team Helpdesk (in Outlook) to automatically update web access specific metadata XML files in the shared network folder, when there are any changes in the lists and settings in Outlook.

Now, open your web browser and point to the TWA URL. Usually the URL is in the format **http://SERVER/TWA/**

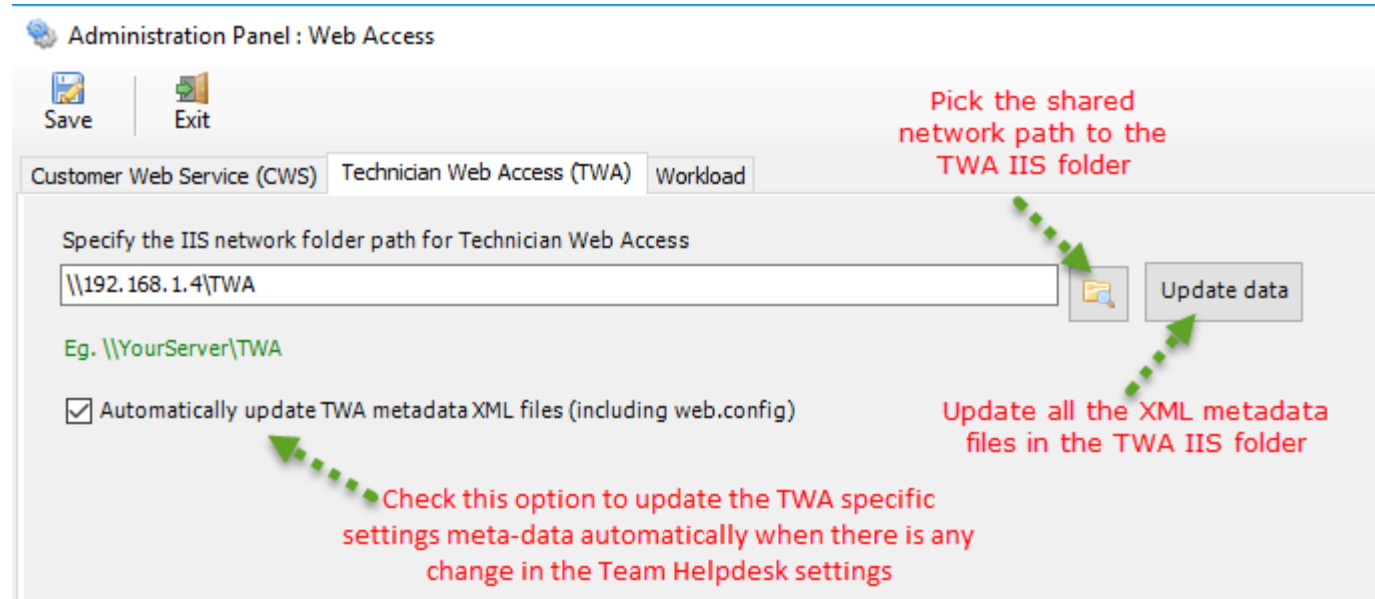
For example, in our instance, it would be *http://byteStation/TWA/*





TWA Admin Panel in Team Helpdesk Manager add-in

The Technician Web Access (or **TWA** which we will refer to often) is an AJAX enabled ASP.NET 2.0 website. It provides a rich set of tools and interactivity with the live helpdesk data stored in the exchange folder. Technicians can create new case, work on existing case and close, re-open or delete case directly from within the web access form.



- 1 Here, you need to specify the shared network path of the TWA folder (which is located in your IIS **C:\inetpub\wwwroot** parent folder on your windows server). To save/update the TWA 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 TWA folder such that all technicians can have access to it from their respective systems within the office network.

- 2 **Automatically update TWA metadata XML files (including web.config)**
Enable this option to allow helpdesk add-in to update the TWA 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 TWA specific metadata XML files in the shared network folder, when there are any changes in the lists and settings in Outlook.



Workload Panel – 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)