NeuQS Standard Installation Guide

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Document Control

Version	Date	Remarks
1.0		

Requirements

Please ensure the following software components are installed:

- Windows Server 2003 Service Pack2 or greater
- IIS 6.0/7.0
- .Net Framework 4.0

Step 1. Database Check

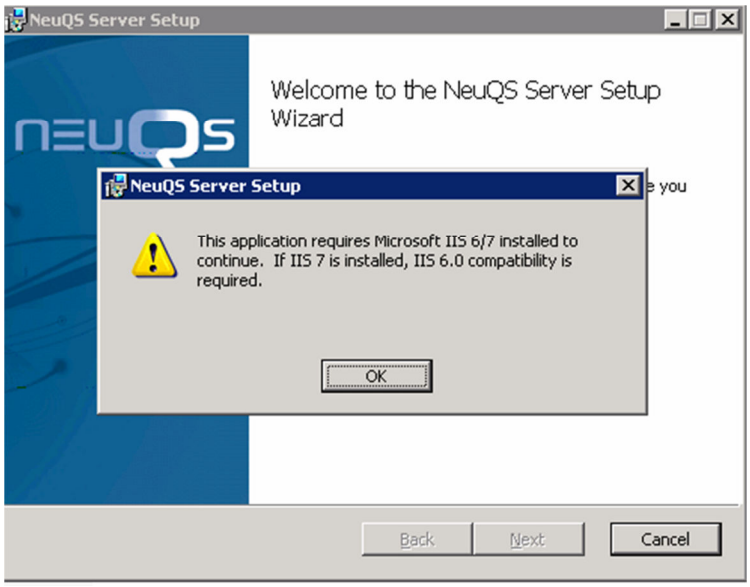
The installer comes packaged with SQL Server Express 2008. If the installer cannot detect a local SQL Express service running, the SQL installer will begin.



Click Accept to begin the installation. Once the SQL Express install is complete, the main NeuQS server component installation will begin.

Step 2. Prerequisite Check

If you don't have any of the prerequisite components installed, the installer will fail to continue. If this occurs, click ok to end the installation. Please install the required prerequisites.



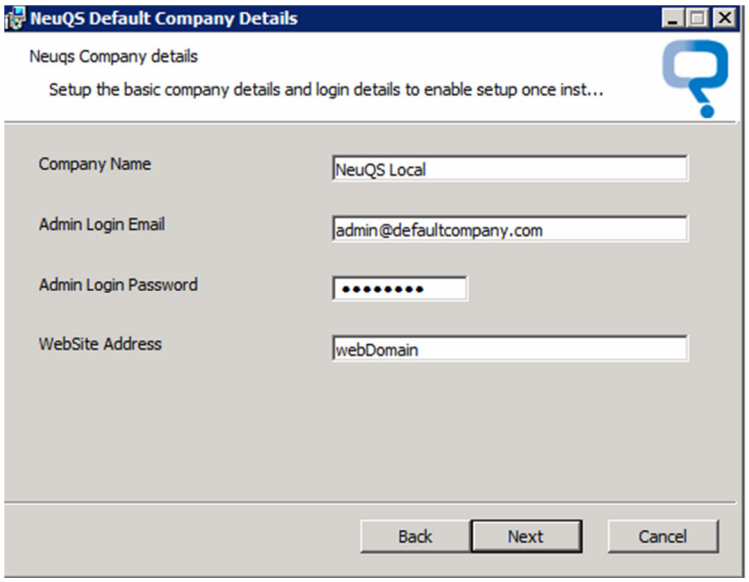
Step 3. Destination Folder

1. After the welcome screen, a prompt showing the install location will appear.
2. Click next to install to the default location, or select a new location by clicking the change button. This will bring up a new dialog box allowing you to select a new folder.

Step 4. Installation Information

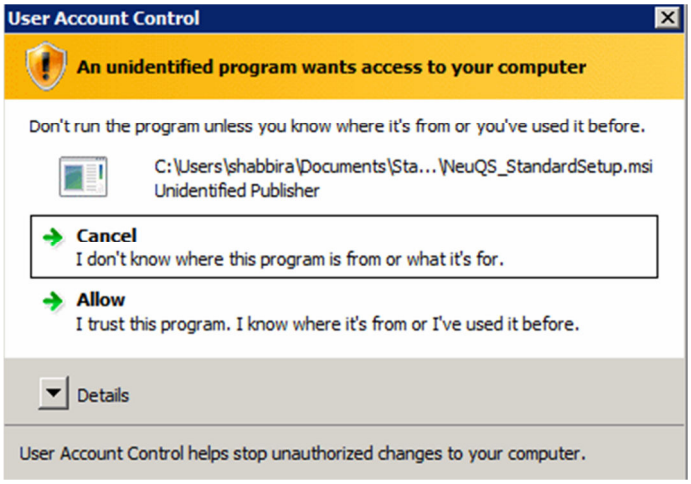
The next step after choosing the destination folder is to enter the company details. The company details include:

1. The Company Name – This will appear in emails from the system
2. Admin Login – This email address will be for the super administrator. The super administrator has full control over the NeuQS server. Once the server is installed, these user details will be used to access the application and complete the setup.
3. Admin Password – The password for the admin user.
4. Website Address – This is the address which will be used to access NeuQS server. This will be entered as the host name for the IIS site. This can be left blank if you wish to access the NeuQs site via machine name/IP address or localhost.



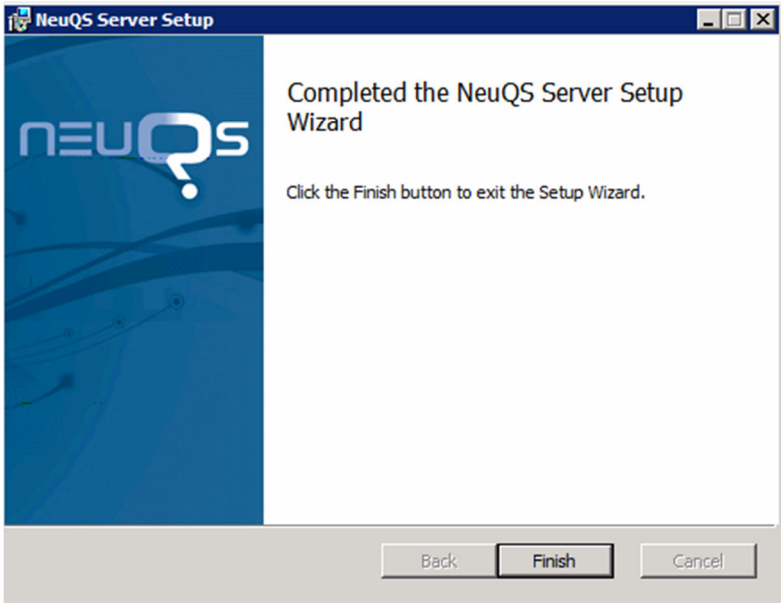
Step 5. Access Control and Completion

The installation will require access to the computer to make changes as a new website is generated and services are installed. In order to do this, a user access control dialog box will appear asking to allow access. Click 'Allow' to finish the installation. Please note, before this point, no files have been installed on your computer.



The installer will do the following:

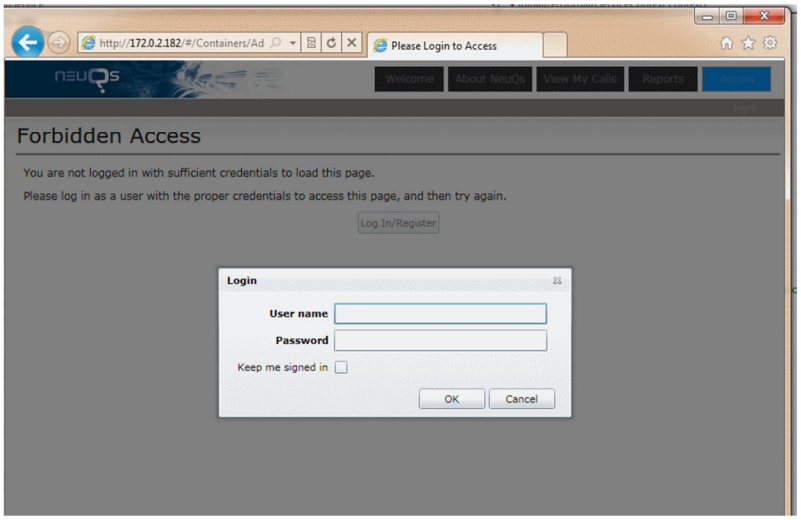
1. Copy the NeuQS web and service files to the chosen directory.
2. Install the NeuQS database on the local SLQ Express server (please note only SQL Express is supported on the free version). If you have uninstalled and are reinstalling, please remove the database created by the previous install.
3. Create a new web site with the host name set to the name given in the installer. The website will default to port 80, so if there is an existing website using this port (and no host name is used), the NeuQs site will be created but won't start due to the clash. The port will have to be changed manually to allow the site to run.
4. Install and start two services
    a. CallTrackerService – a service to send and receive email
    b. CallTrackerMonitor – a service to monitor the status of the CallTrackerService.



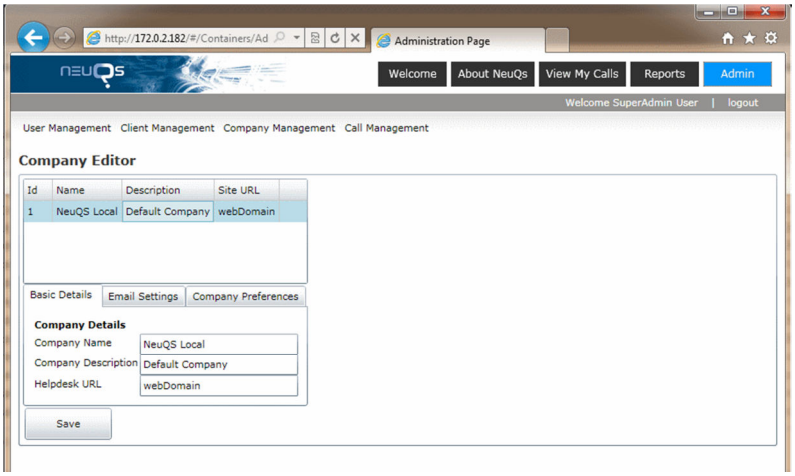
Step 6. Setup Company (Installation)

NeuQS uses the CalltrackerService to periodically check for email and also check the database for changes. The default install comes preinstalled with fictitious information that will lead to connection errors which can be viewed in the event log.

1. Navigate to the installed helpdesk. This will be the URL entered when installing the application – this URL will only resolve if it is set to point to the IP address of the machine where NeuQS is installed. If no URL was entered, the site can be accessed from the IP address or local IP address.
2. Login using the email and password entered during the install.

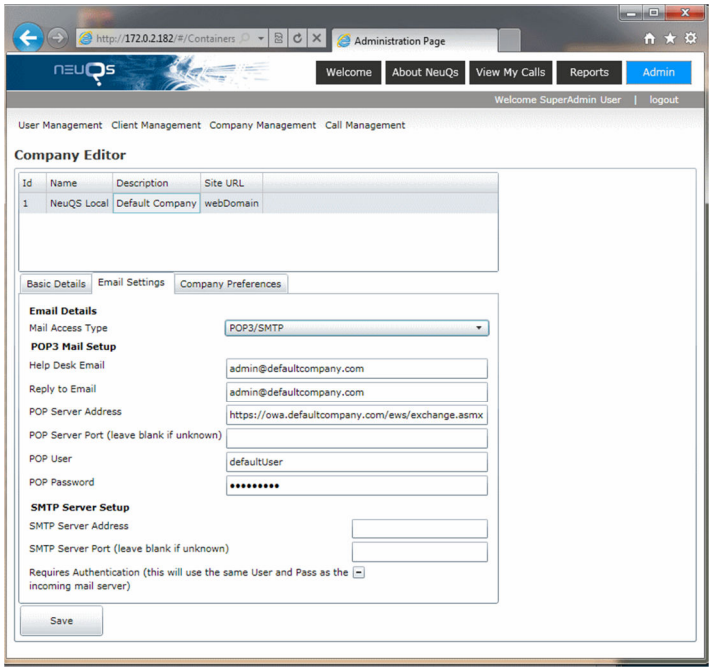


3. Click on Admin to access the Admin area.
4. Click on Company Managements>Edit Company



5. Edit the details on each of the tabs :
6. Basic Details
    a. Company Name – Name to identify the install
    b. Company Description – Description (useful when multiple installs)
    c. Helpdesk URL – this is the URL used to access the helpdesk. This will be used on communications sent to users to link back to the helpdesk
7. Email Settings

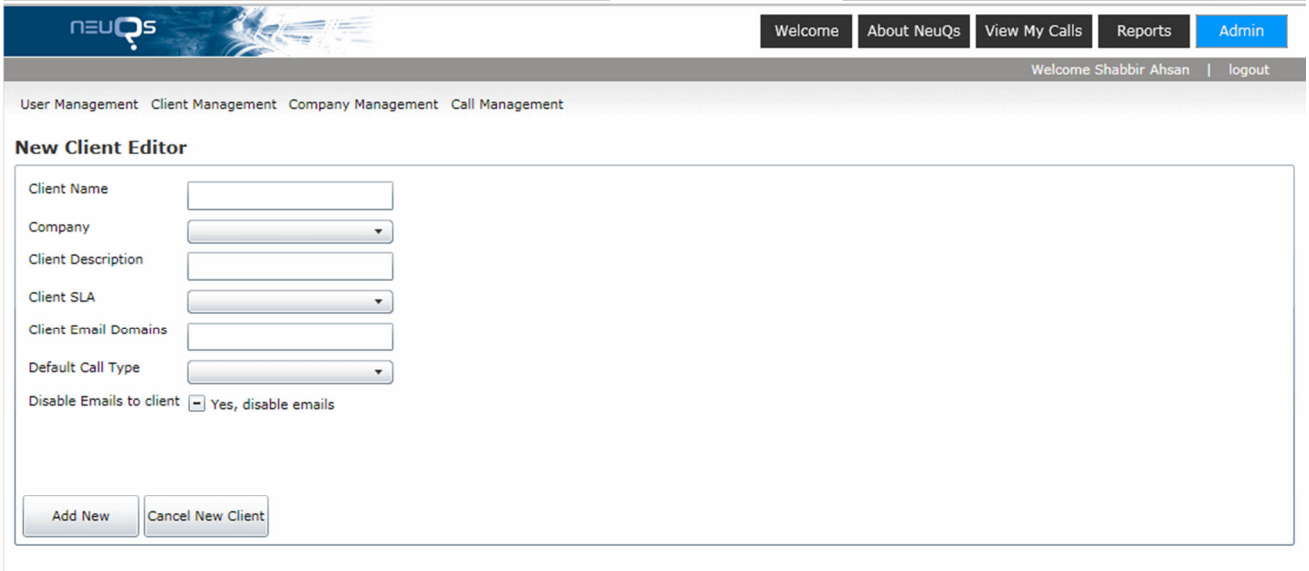
a. Mail Access Type – Selecting from the list will update the form to show different fields. The options and their fields are explained below:
    i. Exchange – NeuQS uses outlook web access to connect to exchange, therefore this facility must be enabled within your exchange environment for it to be effective.
        1. Helpdesk email: the email address where support requests will be sent
        2. Reply to email: The reply email shown on the email sent to users
        3. Exchange Web Services URL: The URL to access exchange
        4. Exchange User: The user credentials to access the exchange account
        5. Exchange Password: The password of the user
        6. Exchange User Domain: The network domain the user belongs to
    ii. POP3/SMTP - Pop3 is the protocol used to send email, whilst SMTP is used to send email. Several fields are common and so will remain the same as the exchange setup.
        1. POP Server Address: The address of the POP server
        2. POP Server Port: If your POP server uses a port other than the standard port of 110, enter it here
        3. POP User: Username to connect to the pop server
        4. POP Password: Password to connect to the pop server
        5. SMTP Server Address: In order to send emails, SMTP is used with POP. Enter your SMTP server address here.
        6. SMTP Server Port: If your SMTP server uses a port other than 25, please enter it here.
        7. Requires Authentication: Most SMTP servers will require authentication. Currently NeuQS will use the user credentials of the POP user/IMAP User.
    iii. IMAP/SMTP – IMAP, like POP is used as the protocol to receive email and as with the POP setting, SMTP is used to send emails.
        1. IMAP server address: The address of the IMAP server
        2. IMAP Server port: If the IMAP server is on a different port than the standard 143, please enter it here.
        3. IMAP User – The user credentials for the IMAP server
        4. SMTP settings – the SMTP setting are the same as those for the POP server.



Step 7. Setting up Clients

Clients equate to the companies which are being served by the helpdesk. NeuQs comes with a default 'Internal' client installed. This must not be deleted as a number of internal functions are run with users assigned to this client.

1. Navigate to Client Management > New Client



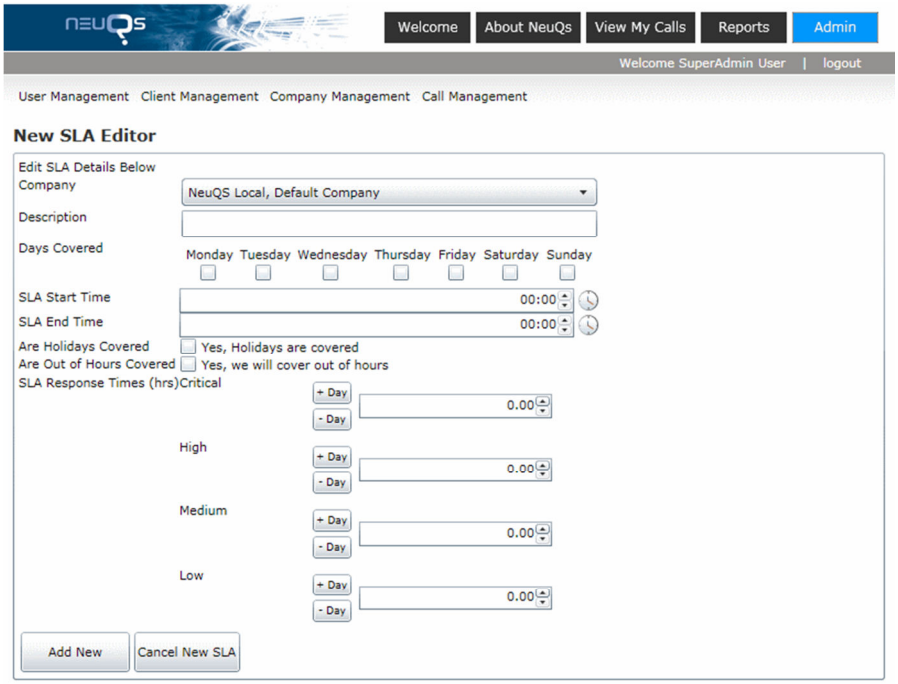
2. Enter the appropriate details and click 'Add New' to save the new client or 'Cancel New Client' to abort the process. The details required are as follows:
3. Client Name – Enter the client name here. This will show when creating calls and subsequent call handling and reports.
4. Company – This will be the default company which is installed

5. Client Description – Any further information can be entered here to help identify the client
6. Client SLA – select from the available Service level agreements. SLA's can be added/amended and deleted by going to Client Management > Edit SLA/ New SLA
7. Client Email Domains – this is used to automatically create new users. If there are multiple domains attributed to the one client, then enter each one separated with a semi-column e.g. 'domain1.com; domain2.com'. When a user which is not already on the system has the same domain as what is entered here, they will be automatically added and assigned to the client.
8. Default Call Type – It is possible to assign a default call type per client. This is useful when there are multiple clients and some clients only request support on a certain issue, with this assigned; the default issue will be pre-selected.
9. Disable Emails to client – if this is ticked then any user already assigned to the user will be set to never receive emails from the NeuQs helpdesk. When creating a client, this will not have an effect as no users will have been assigned.
10. Once the new client is entered, the edit client screen will show. In order to edit a client, click on the client from the list and edit the details in the form below.
11. Click save to confirm any changes.

Step 8. Setting up SLA

Service Level Agreements (SLA's) are used within NeuQS helpdesk to set the call due date based on priority, and also to highlight calls when they are approaching close to the due date.

1. To create a new SLA, Navigate to Client Management>New SLA



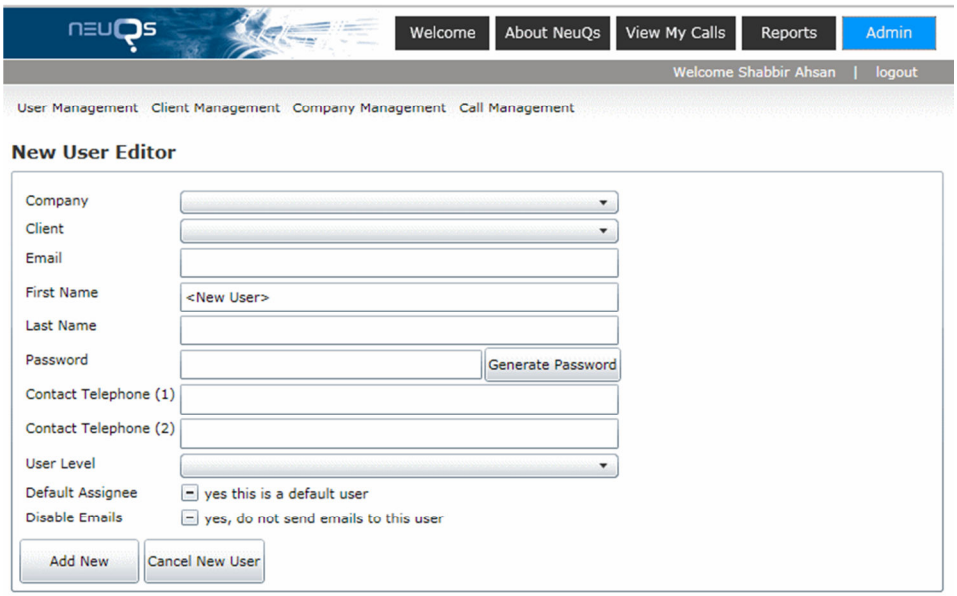
2. The form layout is consistent throughout the admin when creating new records for SLA, users, clients etc. Once the details are entered, click on 'Add New' to submit the details and add the details to the helpdesk, or click 'Cancel New..' to abort the operation. The details for the SLA are explained below:
3. Description – Use an appropriate description for the SLA – this will identify the SLA when assigning to a client.
4. Days Covered – tick which days are covered in the SLA. The help desk will use this to exclude days which are not covered when calculating due date.

5. SLA Start Time – the time of day that support cover begins. This is used in calculating the due date.
6. SLA End Time – The time of day the support cover end. This is used in calculating the due date.
7. Are holidays Covered – Tick if holidays are covered with this SLA.
8. Are Out of Hours Covered – Tick if a call can be dealt with out of hours – this will be displayed to the support operative when managing a call.
9. SLA Hours – Enter the amount of time in hours given to each priority of call. This will be used to calculate the due date of a new call, which is dependent on the priority given. Please note that the hours given depends on the start and end times of the day. E.g if the start time is 9am, and end time is 5pm, a day will work out as 8 hours. Click on +Day to allow the system to automatically calculate this time and add it to the SLA hour of your choice.
10. Once the new SLA is added, the edit screen will show listing all the SLA's. If the new SLA is not visible, refresh the screen to ensure the data is refreshed.
11. Click on any of the SLA's listed in the table to edit them in the form below it. Click Save to ensure the data is saved.

Step 9. Setting up Users

The helpdesk has two default users which should not be removed. The first is the super administrator and the second is the system user. The system user is used for auditing purposes.

1. Create new user by navigating to User Management>New User

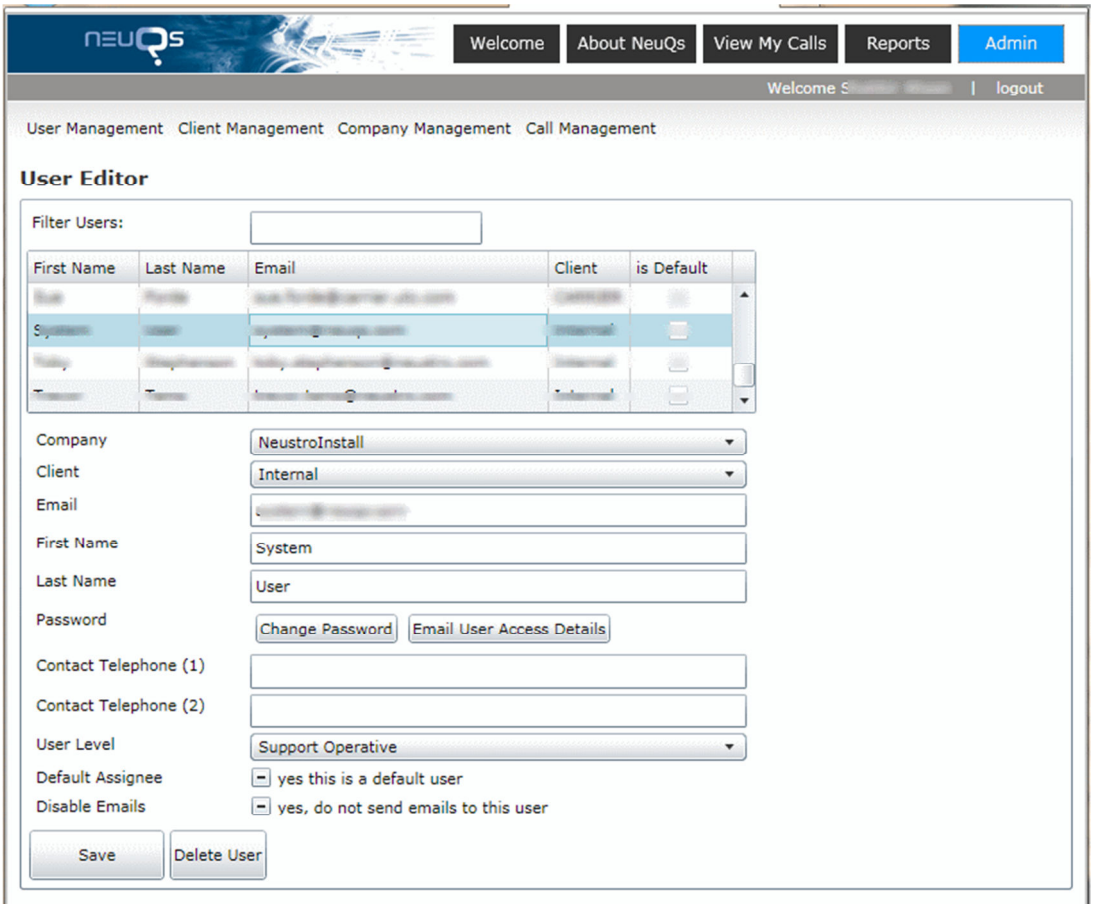


2. Complete the form as appropriate and click 'Add New' to save the new user to the database. The details for the user are explained below:
3. Company - The default install this belongs to.
4. Client - Each user must be assigned to a client. If the user is a client administrator or user, they will be restricted to managing calls assigned to the same client.
5. Email will become their login – when an email address is entered, the system will run a check to see if it is unique.
6. First Name and Last Name – These will be visible on the helpdesk to help identify the user.
7. Password: A password can either be generated or entered by hand.
8. Contact Telephones - these will be visible to support operatives.

9. User Level - NeuQs has different types of users which have different access levels to the helpdesk system. The different users and their corresponding access levels are:

User	Description	Access
Super Administrator	This user has full access to manage the install	Full access – Admin, Call management, reports
Company Administrator	This user can manage the current company only	Cannot create a new company or super users.
Support Operative	This would be the standard user type for any support operative. This user will have access to any assigned calls and any calls where the public user is assigned	Full call management, reports, user management
Client Administrator	The client administrator allows for a designated user to manage users within their own organisation who will access the helpdesk	Call Management – can only see calls from assigned client. Can manage users from assigned client, reports
Client User	The Client user can only see calls where they are assigned, but can also create new calls.	Call Management – can only see manage calls from assigned client
Public User	The public user is a user whereby they have limited access to functionality, but calls where the public user is assigned are visible by other support operatives – this allows calls to be visible to all and then assigned to individual support operatives adding the call to their own list	Call Management – basic viewing of calls

10. Default Assignee – The default assignee checkbox indicates that a new call will automatically have this user assigned to the call.
11. Disable Emails – With this checked, the user will not receive any updates from the helpdesk.
12. Once the new user is added, the edit user screen will show listing the users on the helpdesk system. If the new user is not visible, refresh the screen to ensure the latest data is viewed.
13. Editing the user allows some extra options:
    a. Filter User – to help is finding the correct user to edit; the filter textbox can be used by either typing in the user first name, last name, or email. The search will function as soon as some text is entered into the field
    b. Change Password – The password can be changed using this screen, however the old password must be known in order to change it. A new window will open up allowing for the new password to be entered.
    c. Email User Access Details – the user information can be sent in a system generated email to the user.



After the company, client, SLA and users have been setup, the default setup is complete and you are ready to use NeuQS Helpdesk. Further configuration can be found at www.neuqs.com.

Troubleshooting

I cannot install as it says it requires .net 4.0

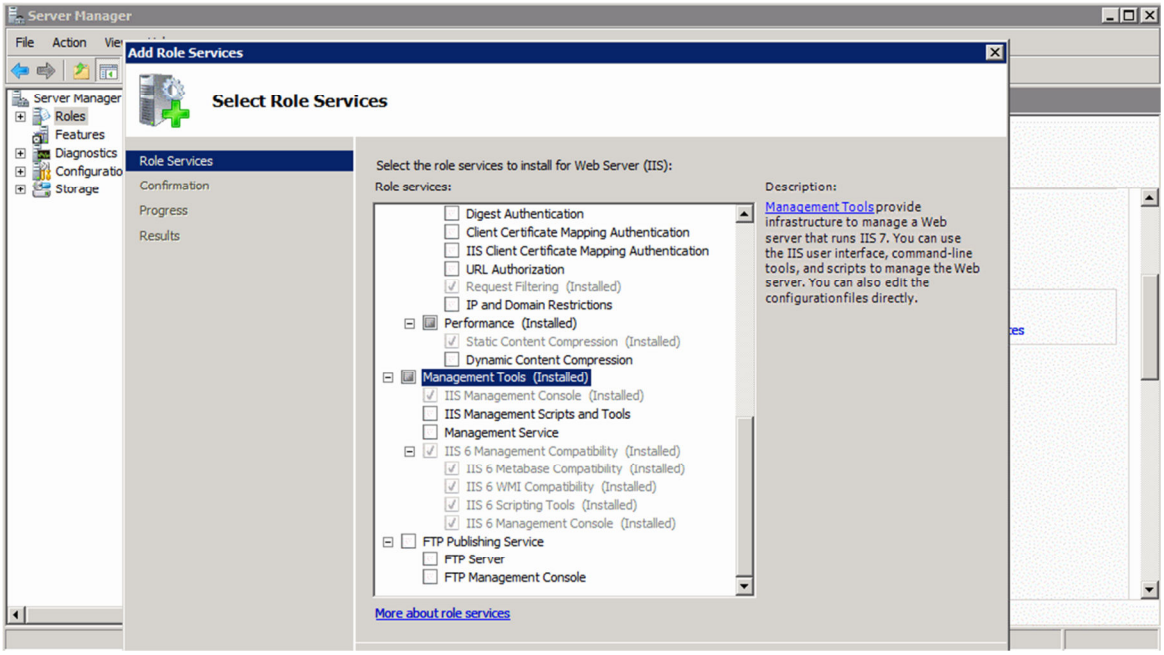
NeuQS is built using the latest .Net 4.0 framework. This can be downloaded separately at http://www.microsoft.com/downloads/en/details.aspx?FamilyID=9cfb2d51-5ff4-4491-b0e5-b386f32c0992&displaylang=en. Please download and install .net 4.0 before starting the NeuQS helpdesk install.

I have IIS 7.0 installed but the installer keeps failing saying I need IIS 6 or 7.

In order to install on a machine with IIS 7 (which is recommended), IIS 6.0 compatibility components are required.

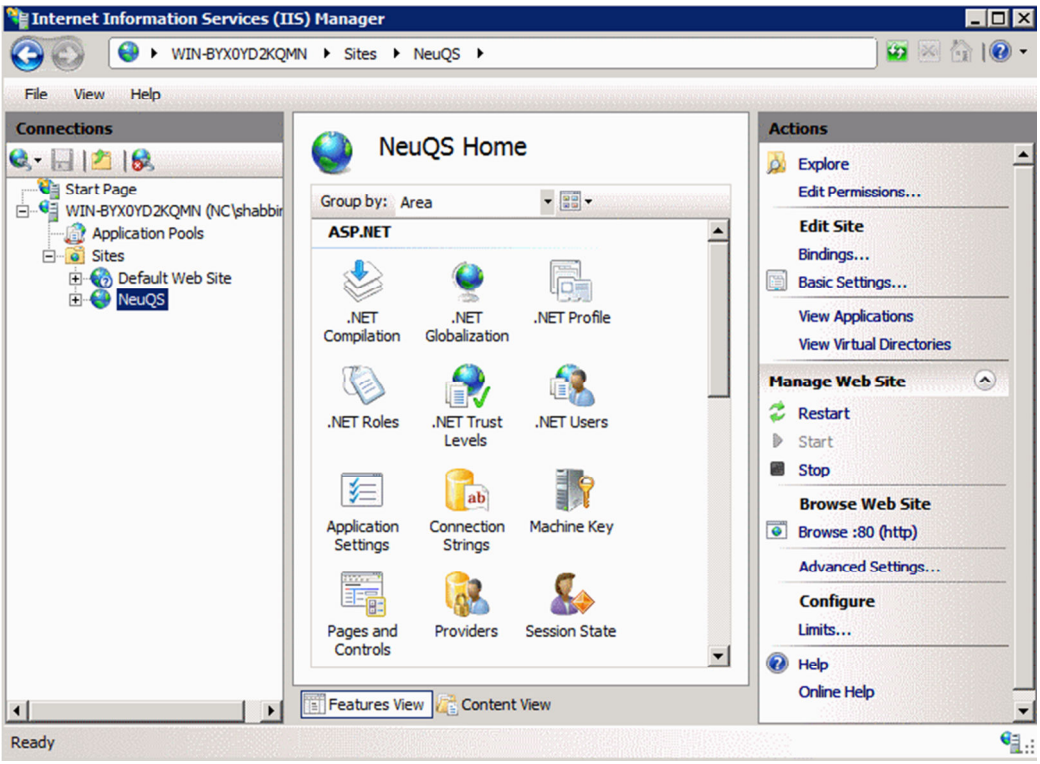
Win server 2008:

1. Go to Server Manager> Roles> Add Role Services in the listing for IIS.
2. Tick the 'IIS 6 Management Compatibility'
3. Click Install to complete the install.



It installed but I cannot access the website

- Firstly make sure that the web site was installed. Go to IIS Manager and expand the Sites branch from the object explorer.
- If NeuQS is not visible as a website please rerun the install. IF it asks to repair or remove, please select repair and try again.



- If the website is there, check if it is stopped. It may be stopped for a number of reasons:
  - The bindings are incorrect. Edit the site bindings. If nothing exists, create a new binding otherwise edit the existing one.

- Type: http;
- Host Name: if you are using a domain name then enter it here (you will need to ensure that the domain points to your new NeuQS server). This may have been entered incorrectly during setup and would require a change (if this is the case, then please remember to edit the company details in NeuQS to take the corrected hostname).
- IP Address: this can be left all Unassigned, unless you wish to restrict connection
- Port: 80 – if there is another site on the server using port 80, this clash would cause the site to fail. If a host name is used to distinguish the two sites then port 80 can be used.

I installed NeuQS and uninstalled. Now when I reinstall it fails with an SQL error

When NeuQs helpdesk is installed, it installs several components. One of those is the database. The database is left intact when NeuQS is uninstalled to ensure any data stored during time of use is not lost. When attempting to reinstall, the installer will try to recreate the same database therefore causing a clash. In order to correct this, please do one of the following. Please note that SQL management studio would be required in order to view the databases on the server – this can be downloaded for free at Microsoft.com.

- Delete the original database
- Detach the database and move the mdf/ldf files to an alternative location
- Rename the database AND the associated mdf and ldf files. This can be done by following these steps:
    - Detach the database by selecting the database and right clicking to bring up the menu. Select Tasks>Detach Database
    - Open the folder containing the database in windows explorer (Usually C:\Program Files\Microsoft SQL Server\MSSQL10.SQLEXPRESS\MSSQL\DATA)
    - Rename the two call tracker database files to whatever is appropriate:
        - CallTrackerDataV1.0.mdf
        - CallTrackerDataV1.0_log.ldf
    - In SQL Management Studio, choose to attach a database
    - Click Add and select the newly renamed mdf file.
    - In the database details form change the ‘current file path’ for
        - CallTrackerDatav1.0.df to the newly renamed MDF file
        - CallTrackerDatav1.0_log.LDF to the newly renamed LDF file.
    - Click OK and the database should now be fully renamed

I have set up the Company, but emails are not being sent or picked up.

- Ensure the email settings you have entered are correct within NeuQS by editing the company.
- Ensure that both the CallTrackerMontior and CallTrackerService services are running.
- If there is a failure in starting, ensure the database is running.
- Please take a look at the event log to see if the service has logged any errors – full error information will be logged to ensure quick resolution.

Still having problems?

Please enter your details and any problems you are having on www.neuqs.com/support.aspx.