



Web+Center User/Developer Conference 2011

January 2011

Palo Alto, CA

Course Outline

The Web+Center application is an integrated suite of web-based applications that is often under utilized since most users and organizations have not taken the time to carefully review each of the functions and their potentials. More importantly, organizations can begin to find real value in the web+center product or other applications when they can leverage the shared resources and data connections between sales, support and business functions. Reviewing support processes that require technicians to enter complete support entries (time entries and resolution notes) that can later be searched in a knowledge base provides a ROI that one can find in a well managed support center. The Web+Center User / Developer conference will provide that background and also other users will be able to share their uses as well.

Course Outline – Overview of topics and schedule

Review "out of the box" Suite of Web+Center applications and their intended uses and functions and best practices

Review of Web+Center web and database architecture models

Review of Web+Center user security models and customer login methods

Reporting and matrix options using search engines and report functions

Creating custom reports

Visual Basic/ ASP programming

Programming tips for Web+Center customizations

Customizing the customer interface for your organizational website look and feel

Other topics presented/requested by attendees and 3rd party vendors

Course Outline – Schedule of Topics

9 AM – 9:50 Introductions and Conference Agenda and Topic Setting

User Introductions and brief overview of how each user using Web+Center within their organization

Set Conference Agenda – Have users propose particular topics of interest for the conference and place them in the agenda at the best time and allow time for these new user selected topics.

10 AM - 10:50 Web+Center Architecture Overview

Suite of 5 Applications of:

Tech+Center

Customer+Center

Pocket+Center

Business+Center

Reservation+Center

Review each of the applications and how they share data among the various applications and review how together they create a comprehensive tool for helpdesk, customer support and sales CRM functions.

Review of Web+Center documentation

Installation guides for various platforms

Getting Started guides

User Guide – **Step Through User guide as there are many important lost and hidden features of the program that the User guide will show.** The user guide is a good place to circle back through concepts that we will explore in other parts of the conference.

Programmers Guide

Power Point Training module

LDAP/Active Directory customer login integration guide

Review Newsletters – Very important source of new features, undocumented features and methodologies

Web+Center Versioning tools and upgrades

Tools now available in Status/Tools in Tech+Center

Method 1: CheckVersions.asp

Method 2: Show all files with dates

Method 3: Download new version and compare dates and move files

Web+Center Remote Control Tool

Customer+Center component

Tech+Center component

Demonstrate remote control tool.

11 to 11:50 – Installation of Web+Center

Start Download and installation process of Web+Center on individual laptops for lab sessions later in the training session.

Explain differences between installing on

Windows 2003, XP, 2000

Vista

Server 7

32 bit versus 64 bit

64 bit ASP mailer from emailarchitect

No 64 bit Access ODBC drivers available so IIS must be configured to run in 32 bit mode

12 to 1 PM – Lunch at Hotel or offsite

1 PM – 1:50 PM Finish Web+Center installation

Review of basic ASP/Database architecture of .asp , inc files

Review of Web+Center folders

Review of ASP programming language and VB code

Techniques and tools to customize the web+center application.

Download textpad from textpad.com

2 -3 PM Web+Center Development environment and debugging techniques

Edit .asp /inc files

Save

Test on browser

Debugging ASP errors and correcting

Configuring IE browsers for full ASP errors

Database Design

Basic concepts of relational database design

View of Web+Center tables and relational modeling

How to create a query in Access and paste that into web+Center web application query.

How to read from the database
How to write to the database

Web+Center Security models

Show various Web+Center customer login models

- LDAP
- Regular customer login with password
- Without password

Setting of cookies and reading of cookies

Customer, tech , business, etc all set a cookie which is read by the application and checked for permission levels.

Tech+Center, Business+Center, Pocket+Center and Reservation+Center administrative logins

Cookie setting and verification with the database

Web+Center style sheets

wc_style.css (Edit wc_style.css with text pad editor to show styles)

Web+Center Buttons

Using Web+Center button creator in Tech+Center – Button Creation Assistant under Administration/Misc functions and utilities

Tech+Center Control Panel Buttons

Customizing existing buttons

Removing existing buttons

Adding new buttons and links and Tech+Center Frames

3-5 PM – Lab to create a Tech+Center page:

The COPY AND PASTE TECHNIQUE –

The fastest way to create Tech+Center page is to copy and paste an existing Tech+Center page into a new file and link it to the system.

Uses Web+Center style sheets

Uses Tech+Center level security

Has a form element that calls a submit page

Submit page display a table of information from a query.

Web+Center Training module Day 2 - Outline

Day 2: 9 AM – 11 Creating custom reports

Finding existing reports that closely match your report requirements

Copy /pasting/ and renaming ASP files

Providing links to them

Creating custom queries using Microsoft Access

Controlling output display, tables, etc

LAB Exercise : Create a new report that does show all cases that have an asset associated with that support case.

11 to 11:50 AM - How to use the Web+Center Send Email Functions

Configuring and testing your SMTP connection using tests in the installtest.htm
SMTP connection-less connections options using NO_SMTP_HOST
Information about www.EmailArchitect.com SMTP component

LAB : Sample Program to send an email using Web+Center SMTP email functions

12 to 1 PM Lunch

1 PM to 1:50 PM Using All of the Web+Center components in an integrated approach

How to use Web+Center for effective customer tracking, help desk, time spent, invoicing, etc

2 PM to 3 PM – Customizing the Customer+Center main portal page with your specific needs

3:00 – 3:30 PM Web+Center Reseller and partner programs

3:30 to 4:00 PM Time to finish projects and other questions.

4 PM – End of Conference