

Making Everything Easier!™

Web+Center

FOR
DUMMIES

Learn to:

- Shift your IT Support Team into high gear
- Discover never discovered features of Web+Center
- Become the Web+Center Guru for your company or organization

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**Internet
Software
Sciences**

Web+Center For Dummies

Version 8.0



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Introduction:

Welcome to Web+Center for Dummies. Why haven't I thought of it before! What a great idea, a dummies for Web+Center would be perfect! They have dummies books for everything on skipping rocks to chess.. why not a Web+Center Dummies guide.

Also, we get an incredible number of support calls where clearly, the person calling has never peeked into our 130 page tomb of our Web+Center user guide and probably for good reason.. most techs installing and configuring our Web+Center product would prefer to explore and test features rather than read a user guide. Luckily our software works well with this trial and error approach! So this guide is a bit of humor thrown in and less than accurate or complete instructions to steer you in the right direction and we leave the full explanation for you to search and find in the complete user guide if needed or a friendly call.

If you need help additional help configuring the software, check out our on-line user guide on our support/documentation page or give us a call/support ticket if you still can't figure it out.

The world of software changes so rapidly in rhythm with rise and fall of the companies that generate the churn of products and services that we are forced to accept that after a while it begins to be just funny how we follow along. So this guide is mean to poke some fun at companies and trends while attempting to explain how to use our overly complicated piece of software effectively.

If this guide is not serious enough, please check out our full suite of user documentation on our website under support.

Sincerely,

Scott Vanderlip

President Internet Software Sciences

Why Web+Center and what is IT?

Web+Center is customizable, web-based help desk ticketing, issue tracking software that fits many Help desk and ticketing scenarios. **What sets us apart from other vendors is our open architecture approach. We provide for all users 100% of the source code with fairly easy to read and follow code and database architectures for building your ultimate help desk ticketing system.** Primarily it is used for internal IT support, but it works well for external customer support, facilities management ticket tracking, asset tracking and IT support companies.

If you haven't already discovered the benefits of a well designed ticketing system, you will be amazed how the everyday support/follow up chaos can be quickly organized.. mainly with the implement of a ticketing system that requests, tickets all funnel through. Sometimes the ticketing software is the most important factor to implementing better and more efficient support processes.

Email based support just can't compare to efficiency and productivity that a true ticketing system can provide. As the number of technicians increase and the number of issues increase, emails flying around just becomes un-manageable for effective tracking and managing. Any time spent installing, configuring and implementing Web+Center is time well spent and will

On-site on in the cloud?

Most users download and install and host Web+Center on their own Windows machines but we do offer cloud-hosted versions of Web+Center with your own unique instance of the software code and database to build your customized help desk in a world class cloud environment.

Hosting Internal or External on the Internet?



Starting with version 8.0, there are now (2) smart phone and mobile “web-based apps” for customers and techs to create, track and manage their support tickets with their smart phone and tablet devices, along with the full screen browser applications. **These are most effective when Web+Center is hosted outside of your firewall and available from the public Internet.** Most organizations are moving in

this direction allowing both techs and customers to access their tickets from anywhere.

Web+Center On-site Installations –

Our install guide size increases faster than the rate of inflation and your health care premiums combined due to Microsoft being Microsoft and moving everything around but doing mostly the same thing as the previous version.

With Windows Server 2012, the MS web server setup once again looks like another new animal, this time a zebra, last time a bird from the amazon.



What we tell users on the phone is that Microsoft likes to re-design it's interface with each new release. It's like a car manufacturer putting the steering wheel on the roof and the brake in the trunk and they wonder why we have a hard time driving the car!

So to install our software, grab a window BOX (Almost all windows boxes will run Web+Center except for wimpy “home editions” that don't support the web server) and you are good to go! You've got an

old laptop running Window 7 pro! Perfect! **This machine must be connected to the network 24/7 and should have daily backup of its file system.**

Actually, most larger organizations 5+ Techs install it on Windows 2012 server now, but it will run on almost any windows box. For the backend database, we offer two choices. SQL*Server or MS Access. Access is easier to install and configure with Web+Center and backup and works well for organizations with 5-10 or less technicians. Beyond 10 techs, we recommend SQL*Server as the backend database choice.

To install:

Step 1) Download the program from the website under Products and Downloads

Step 2) Follow the appropriate install instructions and install it on your own internal Windows systems.

Note: We have purposefully made the install not entirely simple since this is a serious piece of software and we don't want folks wanting to install a system to store their cooking recipes on their computer using this software, although it can be done.

Step 3) We expect at least one call during your install/setup to our friendly support that we can help you with. This helps to establish a long standing relationship that will be beneficial to your tenure using our software. Guess what.. we actually post a direct phone and email for our support on our website!



Getting started – Once Web+Center is installed, it is best to realize that most users of our software never so much as even peek at our user guide for guidance so by reading this guide, you are already years ahead of most Web+Center users. So feel free to poke and prod the software and configuration as the primary method of getting to know the application. We won't tell anybody and when you call support,

we will assume your last name is Keller and you have a good reason why you couldn't read the user guide.

Organizational Model – Us versus them

We have a simple organizational user model, them, the “customers”, the folks with the problems and us, the techs, the ones with the solutions to fix the problems.

To keep our interfaces straight forward for each of the 2 user types, we have created a suite of 7 applications. We purposes have different unique apps to keep it extremely simple for the customers and allow complicated yet powerful applications for the techs. These two user groups map to the various applications:

Customers:

Customer+Center – Full screen browser help desk interface for customers

Customer+Mobile – Smart phone and tablet help desk interface for customers

Reservation+Center – Full screen browser reservation system for customers/tech

Techs:

Tech+Center – Full screen browser help desk interface for technicians

Tech+Mobile – Smart phone and tablet interface for technicians

Business+Center – Business/Sales Tech interface for sales/business backend

Reservation+Center – full screen browser reservation system

Pocket+Center – web-based interface for techs – being phased out

Web+Center Help Desk Basic Ticket Flow

Here's the basic flow of the Web+Center Help Desk

- “Customers” have an issue that needs to be addressed by the support “technicians”
- Customers login into either Customer+Center or Customer+Mobile and create a support ticket
- Technicians, dispatchers are notified of a new support ticket and it is dispatched to a group or down to an individual tech for resolving
- Techs and groups of techs track and manage and document a complete history of interaction with the customer to get the problem resolved. Automatic Email notification messages are sent to customer, techs, tech groups as the ticket is updated by customer or technicians.
- Techs log into the Tech+Center or Tech+Mobile application and track, manage and eventually resolve and close the ticket.

Extras

Besides the basic ticketing, Web+Center is loaded with extras offering customers FAQs, knowledge base keyword searches, asset tracking management, tech and management case reporting features, extensive case and customer searches, customer surveys and a whole lot more.

Advanced Features

Web+Center has been developed over the past 14 years slowly added needed functionality and staying current with technology. Advanced features of the software include integrated Active Directory customer connections, auto-escalation and email to case features, endless notification options to customers, techs, tech groups, supervisors, external users with HTML emails and even SMS notifications.

Our latest set of development is a cross phone platform (iphone and android) set of web-apps enabling techs and customers to create/update, and track and manage support tickets interchangeable between their full screen browsers and their mobile devices.

The basic Web+Center Ticket/Case

The ticketing software is based on creating “cases”. Cases must be associated with a “customer”.

Each case has a unique **case number** that is incrementally created when the case is opened. Each case has a set of fields that define the particulars for that case including:

- One Line Description
- Case History – Running journal of both customer and tech notes about the case
- Case Summary
- Case Resolution
- Selection of various category choices
- Single Line text fields
- Status, priority and group/tech assignments
- Due dates
- Time spent and other accounting costs associated with ticket
- Any attached or associated files
- External Reference numbers

These fields are mostly customizable and configurable through a set of options under Administration.

It is recommend that you evaluate the case options (categories, text fields) and develop the case ticket that best fits your support requirements compromising between detailed information and the customer/tech willingness to enter information into the ticket.



KEEP IT SIMPLE! A case form with 20 drop down lists and 7 fill in boxes is overkill. It may create great reports for managers, but your techs and customers will find it frustrating to enter so much information to create and submit a simple ticket.

EXPLORE!

At this point, it is time to explore the Tech+Center application and all of it's buttons and menus. We are not ready to implement a totally finalized production system yet.. but let's get our feet wet. The best way to get a basic idea of the system is to play with the buttons and functions a bit.. REALLY!

Let log into the Tech+Center application as the high level system configurator level person by visiting the page with our browser:

<http://yourhostname/tech80/>

Replace your hostname in the URL with the host name/IP of your machine and use the following default credentials to login

Username: css-1000

Password: config



To get a general idea of the application, let's cruise the application by going down the button panel on the left hand frame starting at the top. (Note: Some of the buttons may not be enabled for your version so just skip the button if it does not exist on your initial setup.)

Status / Tools – Pressing here will give you a quick overview of your current ticket situation and status of your support staff availability. When tech toggle the BUSY or AVAILABLE button, it sets a flag that can be viewed with this page.

New Customer – This button is new to manually create customers. The system can also create customer accounts by letting the customers self register or Integrated LDAP / AD can also automatically create customer accounts. Go ahead and create a customer account for yourself.

Get Customer – This button allows for searches for individual customers, or groups of customers with links to their cases, creating new cases or view summary, business information about customers. Go ahead and search for your customer account you just created.

New Case – Clicking here allows you to create a new case but first finding a customer. Find yourself and then create a simple test case. Cases can also be initially created by the customer in Customer+Center and Customer+Mobile or also created in Tech+Mobile.

Get Case – You can navigate directly to a specific case or set of cases for a customer or company with this button. Try finding the case you just created!

Assets – A complete asset management system is available to track all of your computer assets or other assets too. This is a completely configurable "asset" system allowing you to reconfigure it to track other items such as purchases, or system accounts logins for clients, etc. Check out our newsletters for article on creative ways to use the Asset component. So click on Assets, and create an asset and search for it to get a feel of assets. All of the asset field labels associated with the assets are configurable at the code level. Refer to other sections in this guide for more on asset customizations.

Inspections – This is a specialized function not typically enabled except for those organizations wishing to use Web+Center for asset inspections based on groups of assets. An example might be inspecting a set of room safety devices. Click here to get an idea of the type of data and searches available but to do an inspection requires more steps.

My Cases/Events – This button refreshes the top open cases window with your current open cases. If calendar is enable, it also shows today's scheduled events too for you! Go back Get Case, assign a ticket to you as configurator and update and refresh this page to show your open ticket assignment appear.

Other Cases – Web+Center is an open system allowing you to see and edit cases assigned to other techs and other tech groups. These open case views can appear in the top window or in a new window. Test it out and view other techs or groups or schedule cases.

Projects – For those wishing to use Web+Center as a project management tool, Projects allow you to combine multiple cases/Tickets into a Project. The most useful feature of projects is the ability to create a project that will then track both Costs and time estimates versus a projected total based on individual time spent costs and hours entered into individual tickets. Test it out. Create a project and add your case you created for yourself. Most simple IT uses do not use this feature and can be hidden.

Tech Report – This button allows techs to do a quick search, sort and analyze their own tickets. Press it and do an empty date range search.

Search Engine - This button is your entry way into the wealth of information store in your support cases database. Let's say you want to find all cases that are still open with priority of high and opened after a specific date and assigned to a group. This search page allows that kind of complicated searches and even reporting and exporting to Excel formats too. Try running a few simple or open ended searches and exporting to see the power of the search engine. This feature is more valuable the longer and more cases you have in the system.

Administration – This button is only available to tech that have Web+Center Administrative permissions or configurator level status. This buttons takes you to the most complicated set of form for the whole application. You can administer tech staff accounts and groups and configure customer surveys. If you are configurator level tech user, you have options to configure many complex system level features of the system as well as creating categories and form fields that appear on case forms and other pages. Click on it and jump around to the various administration. Check out the system configuration options by clicking on the System Configuration Menu link in the upper right hand corner. This is where you can really get yourself in trouble.

Business+Center – This button launches and log the tech into the Business+Center application.

Reports – This page is a set of canned reports for managers and supervisors to view overall performance and information about the help desk cases and status. Additional options to display time spent reports on support issues if time spent feature is used.

Email Case – Use this button to email a case information directly to an existing customer or external customer.

Busy/Available – This button toggles your availability state displayed on the dispatcher page.

Schedule – If you have Web+Center calendar enable, you can schedule meetings, work projects, and event for techs and customers. Has options to integrate with outlook calendar interfaces.

My Info – You can view, and edit/modify your tech account settings, username, email, password and notes for dispatcher screens.

My Assets -Display assets assigned to you and others.

Open Cases – Display all open cases in the top frame window, independent of tech or group. It refreshes every 2 minutes with updated cases information. Cases that closed are removed, new open cases are added.

Reservation – Launches the Reservation+Center application and logs in with your tech information

White Board – Refreshes the large white board area of the Tech+Center application with the white board information. You can edit the white board by clicking on the edit button.

Logout – Logs you out of the Tech+Center

Customer+Center – Let's pretend to be a customer!

Let's now explore the Customer+Center interface. This application is designed to be simple with no training required to access the FAQ and knowledge base self help features, and support ticket creation and updates.

One of the most important steps you can take as IT person to make Web+Center an effective support tool is to log into the Customer+Center as customer now and then and view for yourself the application.

Access the customer portal on your local network with the URL

<http://hostname/customer80/>

<p>Login</p> <p>If you have previously registered with the Customer+Center then enter your previously registered Username and Password and press Login:</p>	<p>Username: james</p> <p>Password: ••••</p> <p style="text-align: center;"><input type="button" value="Login"/></p>
<p>Self registration</p> <p>If you would like to submit a support case (problem, question, or comment), you must first register as a New User</p>	<input type="button" value="New User"/>
<p>Frequently Ask Questions</p> <p>Review a list of the "Frequently Asked Questions" along with their solutions.</p>	<input type="button" value="FAQ"/>
<p>Search Help Database</p> <p>Search for solutions to previously identified problems and questions.</p>	<input type="button" value="Search"/>
<p>Reservation+Center Login</p> <p>Click the Reservation+Center button to launch the Reservation+Center Login page.</p>	<input type="button" value="Reservation+Center"/>
<p>Lost your Username/Password?</p> <p>If you have lost your Customer+Center Username or password or both, then enter the email address you registered with here and press the "Lost ID" button to help recover your Username and password.</p>	<p>Email:</p> <input style="width: 100%;" type="text"/> <p style="text-align: center;"><input type="button" value="Lost ID"/></p>
<p>Launch Customer+Mobile Application</p> <p>Click the Customer+Mobile button to launch the Mobile/Tablet Customer Application</p>	<input type="button" value="Customer+Mobile"/>

Customer+Center portal – Version 8.0



Customize it!

Typically, the Customer+Center may need to be customized to fit your own organizational set of options. These various options (self registration, FAQ, Search engine, Reservations, Customer+Mobile, etc) are configurable by editing the ASP script Default.asp located in the Customercenter directory in the Web+Center folder which is typically located in **c:\Program Files (x86)\Internet Software Sciences\Web+Center 8.0**. If you edit this text ASP (Visual Basic) file with a text editor like NotePad, there is a user configurable section near the top of that module that list several customization options.

To toggle a feature, simply add or remove the single quote character at the beginning of the line.

For example, you will find the lines of code like:

```

ShowReservationCenterLink = "YES" ' Display the reservation+center link
ShowCCLogin = "YES" '- Display the web+center customer login (non AD)
ShowSelfRegistration = "YES"
    
```

To disable Self Registration, put a single quote character in front of the line

```
ShowSelfRegistration = "YES"
```

And change it to

```
' ShowSelfRegistration = "YES"
```

Save the Default.asp file and refresh the Customer+Center home page and you will see the Self Registration option disappear from the page. It's that simple!



A few words about the importance of using the Customer+Center

The Customer+Center is a critical component of your help desk. It is the part of the application that allow customers to feel they have 24/7 quality support. Some organizations only use the Tech+Center and do not have the Customer component enabled. We highly recommend you configure both this customer+center portal option and if hosting your site outside the firewall, the Customer+Mobile application too. Here are some reasons why:

Better Support Processes

Implementing the Customer+Center also forces better support processes within an organization. If your IT staff has a default process of supporting those who knock the loudest on your door and catch you first in the hallways, then implementing Web+Center and asking all those who have an issue to report it to the Customer+Center ticketing so it entered, logged, dispatched and resolved.

Document work provided by IT staff

IT staff is typically under-funded, overwork and under appreciated until a fire drill happens and then they are blamed. Web+Center provides the true support ticket numbers and time spent supporting users for those who think IT groups are that important. If you have a hard time justifying the cost of a ticketing system, it can easily pay for itself by providing evidence that you need additional IT staff resources to cover all of the support issues that come up.

Look professional and organized

You can increase the IT staff's image throughout the company and organization with the implementation of a support ticketing system. Emails, phone calls, and sticky notes on doors just get lost now and then and things appear to disappear into the black hole of space for many IT requests. Add a Web+Center customer survey to your IT support processes, and you will make your IT group look stellar!

Never Discovered Features of Web+Center



Well actually, this feature has been discovered by a few, but certainly many do not use this feature. That feature is the Web+Center Knowledge base or KB. What makes Google so useful, we also have too with very fast keyword searching into your vast support ticket database, instantly! It's like finding the pin in the hack stack.

Let's say you have a new support case and the user reports that reports the following message containing the phrase "Error 3095-8004"

Maybe someone else reported this error previous and it was solved but how to find it?

Once cases and all of the case text fields (case one line, history, summary, resolution) have been parsed and added to the Web+Center knowledge base, you can use the Search Engine and enter the phrase "3095-8004" and it will find the cases that included that string in all of the cases in any of the fields of the case ticket.

Web+Center Guru –

You too can be the Web+Center guru at your company, school or organization by understanding how to maximize the pieces of the Web+Center applications to work optimally for your group.



One the easy options you as Web+Center guru can implement is a web+Center customer survey. In addition to getting feedback on your tech's ability to solve support tickets, you would get continual feedback on the ticketing system itself and work on refining the prompts, processes, ticket assignments, routing, email notification messages and more to make it work better.

Put yourself into the shoes of a customer!

This is easy to do by creating a customer account for yourself in the system (in addition to your tech account) and testing out the Customer+Center and Customer+Mobile interfaces yourself with a ticket that goes through the full support processes of dispatching, interacting with techs and eventual closing. You might catch some prompts or labels that are confusing for the customers when submitting and updating tickets. Be sure to act like a dumb customer when submitting a ticket that needs every bit of prompting necessary!

Selling and training users on how to use the system

Any help desk system will fail when a tech staff or set of customers or administrators want to make it fail and look in-effective. Take it upon yourself to understand the system and features and then creating training guides and sessions with best practices for techs, short on-line tutorials for customers. Make sure the help desk is promoted as the best way to create a support ticket and discourage support issues for IT staff from being the common Snag the IT in the hallway approach.

Keep the ticketing working for the techs, not against them!

Many techs are threatened when a ticketing system is installed forcing some accountability by techs for their time and hours and projects. Be careful not to use the wrong approach by using the software to show fault. It should be as a tool to promote collaborative sharing of jobs, resources and expertise. Be a Web+Center guru and make sure it is not in place to punish, but to organize and help and distribute work loads. Using the Time Spent feature forcing techs to put in their time and resultant reports can be damaging or productive in the different context and management style.

Subscribe to Internet Software Sciences newsletter updates

Internet Software Sciences publishes monthly newsletters with new product updates and release information. Being aware of new updates, fixes, trends and article about other Web+Center users and how they are using it for unique applications will make you a guru plus!

Putting your business on-line with the Web+Center Business+Center component

Starting with version 5, a sales CRM and accounting component was added to the Web+Center suite with the Business+Center application.

Although many Web+Center users do not have requirements for sales/contact management tracking, we built this component for those companies that one to create a one-stop sales/support/business operations system with share databases of customers and support tickets.

We also developed this component for our own internal use to managing a growing set of users, invoices, support renewals, quotes, hourly consulting projects, licensing systems and license keys, download leads, other contact leads and sales follow ups. With over 100,000 downloads and systems world wide, we needed a on-line system.

The Business+Center has expanded to include a set of Email marketing/sales/ custom bulk email options to notify customers, user groups, selected users with customized HTML emails for sales and other purposes.

The Business+Center is tightly integrated with our download processes and sales following, all purchases, renewals, consulting group, licenses, expiration dates as well as our sales contact database.

We keep a running history of all our downloads and automatically capture and combine download user information with previous downloads to identify repeat users and other critical sales information.

The Business+Center requires a “tech” account to log into to access the customer/contact database and create invoices and send sales/contact emails.

We use the mini accounting part of Business+Center to create quote, invoices for purchases and support renewals and consulting.

You can too! We have architected the business+center to configurable to your own business processes. Certainly on the biggest benefits of the Business+Center is the combination of having a pre-sales database customer information now available for support information, offer superior customer support knowing their entire customer history when supporting them.

