

versaCAT v2.1.0

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1.0 System Requirements

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- versaSRS 4.1.0
- Windows Server 2008 / 2003 / 2000, Windows 7, Windows Vista, Windows XP
- The Microsoft .NET Framework 2.0
- IIS 5 / 6 / 7
- ASP.Net 2.0
- SQL Server 2008 / 2005 / 2000, SQL 2008 / 2005 Express
- Microsoft Internet Explorer 6 and above

2.0 Installation Instructions

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If you intend to install versaCAT using the supplied msi based installer, you will need to uninstall any previous versions of versaCAT before installing versaCAT 2.1.0.

Alternatively, you can manually install versaCAT by overwriting you existing installation with the contents of the versaCAT folder supplied as part of this download.

Tip: for previous installations, backup your versaCAT web.config file. The information contained within this file will help you to configure the web.config of versaCAT 2.1.0.

3.0 Application Configuration

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versaCAT has been designed to provide you with a flexible solution to allow your clients to authenticate to the system.

The web.config of versaCAT, described below, allows you to configure how your clients will be authenticated to the application as well as control the behavior of the system.

The web.config file is located in the following default location:

C:\Program Files\VersaDev\versaCAT\versaCAT\web.config

Note: The default installation of versaCAT is configured for Forms based authentication, user is required to provide a username and password to logon.

Web.Config App Settings Keys

AppTitle: Defines the application title displayed at the top of the browser window.

Example: value="versaCAT"

ClientValidationMode:

value="0" - Windows based authentication (requires username only)

value="1" - Forms based authentication (requires username and password to logon)

Note: The authentication mode of the web.config must correspond to the appropriate ClientValidationMode

Example: if the ClientValidationMode is set to 0, the authentication mode, defined within the web.config file, must be set to Windows as follows:

<authentication mode="Windows">

ClientValidationQuery: Defines the SQL Query used to return Password and Email for a client defined by Username.

Example 1 - Forms Based Authentication Against The versaSRS / versaCRM Module

```
ClientValidationQuery Value="SELECT dbo.tbl_VCRMContact.Password,
dbo.tbl_VCRMAddresses.EmailAddress1 AS Email FROM dbo.tbl_VCRMContact LEFT
OUTER JOIN dbo.tbl_VCRMAddresses ON dbo.tbl_VCRMContact.ContactID =
dbo.tbl_VCRMAddresses.ParentID WHERE (dbo.tbl_VCRMContact.Username =
'[USERNAME]') AND (dbo.tbl_VCRMContact.CanLogon = 1) AND
(dbo.tbl_VCRMAddresses.ParentTypeID = 2) AND
(dbo.tbl_VCRMAddresses.AddressNumber = 1)"
```

In the example above, the client will be prompted to provide a username and password to gain access to versaCAT.

The user will be granted access provided the username and password match with a record within the database.

The query above will also return their email address which allows the system to display only those calls for which they are the Primary Requestor.

Note: the username and password is defined under the versaCAT tab of a versaCRM contact record.

Example 2 - Windows Based Authentication Against The versaSRS / versaCRM Module

```
ClientValidationQuery Value="SELECT " AS Password,  
dbo.tbl_VCRMAddresses.EmailAddress1 AS Email FROM dbo.tbl_VCRMContact LEFT  
OUTER JOIN dbo.tbl_VCRMAddresses ON dbo.tbl_VCRMContact.ContactID =  
dbo.tbl_VCRMAddresses.ParentID WHERE (dbo.tbl_VCRMContact.Username =  
'[USERNAME]') AND (dbo.tbl_VCRMContact.CanLogon = 1) AND  
(dbo.tbl_VCRMAddresses.ParentTypeID = 2) AND  
(dbo.tbl_VCRMAddresses.AddressNumber = 1)"
```

In the example above, the user will be granted access provided the Windows username is found within the database.

The query above will also return their email address which allows the system to display only those calls for which they are the Primary Requestor.

Note: the username and password is defined under the versaCAT tab of a versaCRM contact record. The password is not required when versaCAT is configured for Windows-based authentication.

Example 3 - Forms Based Authentication Against The versaSRS Database Table tbl_ClientAccess

```
ClientValidationQuery Value="SELECT Password, BEmail As Email FROM tbl_ClientAccess  
WHERE Username = '[USERNAME]'"
```

In the example above, the client will be prompted to provide a username and password to gain access to versaCAT.

The user will be granted access provided the username and password match with a record within the database. The query above will also return their email address which allows the system to display only those calls for which they are the Primary Requestor.

Example 4 - Windows Based Authentication Against The versaSRS Database Table tbl_ClientAccess

```
ClientValidationQuery Value="SELECT Password, BEmail As Email FROM tbl_ClientAccess  
WHERE Username = '[USERNAME]'"
```

In the example above, the user will be granted access provided the Windows username is found within the database (tbl_ClientAccess). The query above will also return their email address which allows the system to display only those calls for which they are the Primary Requestor.

ClientValidationVersaCRM: Governs whether the ClientValidationQuery is to be performed against the versaCRM module of versaSRS.

value="0" - Disabled

value="1" - Enabled

Note: this setting should always be set to a value of 1 when accounts are defined under the versaCAT tab of the versaCRM contact module.

ClientReminderQuery: Defines the SQL Query used to return a username and password for a given email address.

This feature is only available when the application is configured for Forms-based authentication.

Example 1: Password Reminder Query For Forms Based Authentication Against The versaSRS / versaCRM Module

```
value="SELECT dbo.tbl_VCRMContact.Username FROM dbo.tbl_VCRMContact RIGHT OUTER JOIN dbo.tbl_VCRMAddresses ON dbo.tbl_VCRMContact.ContactID = dbo.tbl_VCRMAddresses.ParentID WHERE (dbo.tbl_VCRMAddresses.ParentTypeID = 2) AND (dbo.tbl_VCRMAddresses.AddressNumber = 1) AND (dbo.tbl_VCRMAddresses.EmailAddress1 = '[EMAIL]')"
```

Example 2: Password Reminder Query For Forms Based Authentication Against The versaSRS Database Table tbl_ClientAccess

```
value="SELECT dbo.tbl_ClientAccess.Username FROM dbo.tbl_ClientAccess WHERE dbo.tbl_ClientAccess.BEmail = '[EMAIL]'"
```

See Also: Password Reminder Email Template

RemoveDomainFromUsername:

Governs whether the DOMAIN is removed from DOMAIN\USERNAME when the system is configured for Windows authentication.

value="0" - Do not remove the Domain.
value="1" - Remove the DOMAIN

AllowSecondaryRequestor:

value="0" - Display only those calls where the Client is the Primary Requestor
value="1" - Display Calls where the Client is either the Primary or Secondary Requestor.

ApplyQueueRestrictions:

value="0" - Default, provide access to Calls logged within any Queue, governed by AllowSecondaryRequestor setting
value="1" - Provide access to Call logged within any Queue where the versaSRS Queue setting versaCAT Access is enabled, governed by AllowSecondaryRequestor setting

AllowedQueues:

This allows an instance of the application to be configured specifically to provide access to Client Calls only within specific Queues.

The value of this key is a comma delimited list of Queue Ids. When this value is populated the user will be granted access to the Call provided the Call belongs to a Queue in the list.

All previous security checks (AllowSecondaryRequestor, ApplyQueueRestrictions) still apply and have a higher priority. When this value is empty, this additional security check is disabled.

Example:

value="1,7,9,21"

Apply all security checks and then check to make sure that the Call also belongs to one of the Queues defined by the Queue Ids 1, 7, 9 or 21.

SysAdminEmail: Email address of the system administrator (e.g. webmaster@mydomain)

Refresh1: Refreshes the displayed calls (e.g. 60 - units seconds).

Example:

value="120" - 120 seconds

Region: Governs the display and input format of dates within the system.

value="-2" (dd/MM/yyyy HH:mm:tt):<add key="Region" value="-2"/>
value="-1" (MM/dd/yyyy HH:mm:tt):<add key="Region" value="-1"/>
value="1" (MM/dd/yyyy hh:mm:tt ss):<add key="Region" value="1"/>
value="2" (dd/MM/yyyy hh:mm:tt ss):<add key="Region" value="2"/>

PageSize: Defines the number of Calls displayed per page.

Example:

value="5" - 5 records per page

ReadingPane: Defines whether the reading pane is displayed.

value="0" - Hide reading pane
value="1" - Show reading pane

EnableCallComments: Governs whether Call comments are exposed to the Requestor(s).

value="0" - Disabled
value="1" - Enabled

ShowCallComments: Sets the default state of the Show comments checkbox of the Call History (Printer Friendly) window.

value="0" - Unchecked
value="1" - Checked

ShowCorrespondenceHistory: Sets the default state of the Show correspondence history checkbox of the Call History (Printer Friendly) window.

value="0" - Unchecked
value="1" - Checked

ShowLogout: Governs whether the Logout button is displayed.

value="0" - Hide Logout button
value="1" - Show Logout button

CorporateLogo1: URL to image (type: GIF, JPEG, or PNG) displayed within the Call History (Printer Friendly) window.

Example: value="images/versaSRS_logo1.gif"

CanManageProfile: Defines whether the versaCAT user can manage their profile.

Note: this feature should only be enabled for account details stored within the versaSRS database table, tbl_ClientAccess or when versaCRM is enabled.

When this feature is enabled, the following properties cannot be modified by the user: Username, Email Address. Please note that any Notes recorded against the account are not exposed via versaCAT.

value="0" - Disabled
value="1" - Enabled

EnableKB: Defines whether the Knowledge Base button is displayed providing access to the Knowledge Base tool.

value="0" - Hide button
value="1" - Show button

KBBaseURL: URL to the versaCAT Knowledge Base module.

Example: value="http://localhost/versacat/modules/helpdesk_kb/kbview.asp?kbaid="

KBTitle: The Knowledge Base Title displayed in the Internet Explorer Window

Example: value="versaSRS Knowledge Base"

KBPageSize: The number of Knowledge Base records returned per page

Example: value="5" - 5 records per page

KBSearchModule: Defines whether full-text search is enabled for searching the Knowledge Base

value="0" - Disabled
value="1" - Enabled

You will also need to setup full-text search, see: To Enable Full - Text Knowledge Base Search.

KBPublicAccessOnly: Defines whether the system restricts the display of Knowledge Base articles to those marked with Enable Public Access.

value="0" - Disabled, provide access to all articles
value="1" - Enabled, provide access to only articles marked with Enable Public Access

EnableRSS: Governs whether the RSS feature of the Knowledge Base module is enabled.

value="0" - Disabled
value="1" - Enabled

KBImagePath: Defines the relative image path of images used by the Knowledge Base module.

value="images/" - default value

UploadPath: Defines a temporary upload folder for attachments.

Example: value="c:\temp\"

MailServer: Defines the I.P. address or name of the mail server that will be used when sending email.

SMTPPort: Defines the SMTP port that will be used when sending email.

value="25" - default value

DesktopEmailClient: 0 - Use versaCAT to compose email-based correspondence, 1 - Use the Client's Mail Client (e.g. MS Outlook).

MailTo: Defines a versaSRS email account (i.e. an email account that will be processed by versaSRS).

MailSubject: Defines the default subject field when logging a new call.

PasswordReminderEmailXmlSrc: Defines the relative path and filename of the password reminder email template.

Example:

value="PasswordReminderEmail.xml" - default email template

See Also: Password Reminder Email Template

The following web.config appSettings keys are reserved for internal use and must be set as follows:

| | |
|------------------------|---------------------------------------|
| SiteID | value="1" |
| versaMenuLicenseKey | value="A1T29-FGIJH-NU0XR-FKFMF-NGHOK" |
| CustomFilter | value="0" |
| CustomFilterDSN | value="" |
| CustomFilterXmlSrc | value="" |
| CustomFilterXslSrc | value="" |
| CustomFilterFullAccess | value="0" |

Web.Config Database Connection String Settings

These settings are defined within the <connectionString> section of the web.config file.

The connection string settings are described below:

DSN: Defines the database connection string for the versaSRS database.

Example:

```
connectionString="server=localhost;database=VersaSRS;uid=versasrs;pwd=Versa2008!"
```

Tip: The DSN connectionString will be the same as that defined by SqlConnectionString within the web.config of versaSRS.

ClientValidationDSN: Defines the connection string to the database containing client details and logon credentials.

Note: This is typically the same value as defined by DSN.

KBDSN: The Knowledge Base database connection string to the database

Note: This is typically the same value as defined by DSN.

4.0 Database Configuration

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You will need to update the versaSRS database to support versaCAT 2.1.0.

The following script must be run against the versaSRS database.

C:\Program Files\VersaDev\versaCAT\Setup\versaCAT_2_1_0_Struct.sql

5.0 Accessing versaCAT

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After installing versaCAT, you can access the system via the URL:

http://localhost/versacat/

or

http://myserver/versacat/

The credentials required to logon to the system will depend on the Client Validation defined within the web.config

6.0 Password Reminder Email Template

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The password reminder email is defined by an email template. The email template is an XML file that can be modified using any text editor (e.g. Notepad.exe).

The default password reminder email template is PasswordReminderEmail.xml. This file is located within the root folder of the application.

The contents of this file is presented below:

```
<?xml version="1.0" encoding="utf-8" ?>
<PasswordReminderEmail>
  <EmailFrom>support@mydomain</EmailFrom>
  <EmailTo>[EMAIL]</EmailTo>
  <EmailCc></EmailCc>
  <EmailBcc></EmailBcc>
  <EmailSubject>versaCAT - Password Reminder</EmailSubject>
  <EmailFormat>HTML</EmailFormat>
  <EmailBody>
    <![CDATA[
```

```
Your Username: [USERNAME]<br />  
Your Password: [PASSWORD]<br />  
]]>  
</EmailBody>  
</PasswordReminderEmail>
```

Each element is described below:

<EmailFrom> - defines the email From address

<EmailTo> - defines the email To Address. The tag, [EMAIL] will be automatically replaced with the email address of the person requesting the reminder.

<EmailCc> - defines optional email Cc recipients. For example you could copy the request to a versaSRS enabled mailbox.

<EmailBcc> - defines optional email Bcc recipients. For example you could blind copy the request to a versaSRS enabled mailbox.

Note: to specify multiple recipients, delimit each recipient with a semi-colon.

<EmailSubject> - defines the email Subject.

<EmailFormat> - defines the mail message format. When set to HTML the message will be HTML format and Plain Text for any other value.

<EmailBody> - defines the mail message body. When entering HTML, the HTML should be enclosed within the tags <![CDATA[and]]> unless XHTML is entered.

Note: the tags [USERNAME] and [PASSWORD] will be automatically replaced with the user's username and password respectively.

7.0 To Enable Full - Text Knowledge Base Search

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MS SQL Server Configuration

Step 1.)

- Please refer to the following Knowledge Base article:
<http://www.versadev.com/kbview.aspx?kbaid=180>

Step 2.)

versaCAT - web.config Configuration

- Edit the appSettings section of the versaCAT web.config, set the value of the key, KBSearchModule to 1.

Note: Changes to the web.config will destroy any active sessions with the application. Please make sure that users are not running versaCAT when modifying the web.config.

8.0 Customizing the Printer Friendly View Of Call Data

The printer friendly view of Call data is displayed via the ASP.Net page printcall.aspx.

This page has been designed to allow clients to edit the page and therefore control which Call properties are displayed and how they are presented.

The list below indicates how to include Call properties within the page. Because contact data can be re-mapped to different fields within versaSRS (e.g. the system may be configured to store a requestor's Fax number within the Computer field), it is up to the client to set the appropriate display label for each property: printer friendly labels are not based on the versaSRS system labels.

| | |
|---------------------------------------|----------------------------------|
| <%# oCallDetails.CallID.ToString() %> | Call # |
| <%# DateEntered %> | Logged Date |
| <%# oCallDetails.HDUserFullName %> | Logged By |
| <%# oCallDetails.Problem %> | Problem |
| <%# oCallDetails.CallType %> | Call Type |
| <%# oCallDetails.ReceivedBy %> | Received By |
| <%# oCallDetails.CallStatus %> | Status |
| <%# oCallDetails.Description %> | Call Details |
| <%# oCallDetails.Solution %> | Call Solution |
| <%# oCallDetails.QueueName %> | Queue |
| <%# oCallDetails.SkillGroupName %> | Skill Group |
| <%# oCallDetails.UserFullName %> | User / Owner |
| <%# oCallDetails.PriorityID %> | Priority |
| <%# oCallDetails.Key1Text %> | Key 1 |
| <%# oCallDetails.Key2Text %> | Key 2 |
| <%# oCallDetails.Key3Text %> | Key 3 |
| <%# DueDate %> | Due Date |
| <%# EstSolDate %> | Estimated Solution Date |
| <%# oCallDetails.CompanyName %> | Primary Requestor Company Name |
| <%# oCallDetails.FirstName %> | Primary Requestor First Name |
| <%# oCallDetails.LastName %> | Primary Requestor Last Name |
| <%# oCallDetails.Email %> | Primary Requestor Email |
| <%# oCallDetails.Phone %> | Primary Requestor Phone |
| <%# oCallDetails.Division %> | Primary Requestor Division |
| <%# oCallDetails.Department %> | Primary Requestor Department |
| <%# oCallDetails.Location %> | Primary Requestor Location |
| <%# oCallDetails.Computer %> | Primary Requestor Computer |
| <%# oCallDetails.Username %> | Primary Requestor Username |
| <%# oCallDetails.ReqCompanyName %> | Secondary Requestor Company Name |
| <%# oCallDetails.ReqFirstName %> | Secondary Requestor First Name |
| <%# oCallDetails.ReqLastName %> | Secondary Requestor Last Name |
| <%# oCallDetails.ReqEmail %> | Secondary Requestor Email |
| <%# oCallDetails.ReqPhone %> | Secondary Requestor Phone |
| <%# oCallDetails.ReqDivision %> | Secondary Requestor Division |
| <%# oCallDetails.ReqDepartment %> | Secondary Requestor Department |
| <%# oCallDetails.ReqLocation %> | Secondary Requestor Location |
| <%# oCallDetails.ReqComputer %> | Secondary Requestor Computer |
| <%# oCallDetails.ReqUsername %> | Secondary Requestor Username |

9.0 Support

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