

# Installation Manual for CCS Service Request 5.0

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## Summary

This Manual explains how to install the core components of CCS Service Request 5.0. We provide a CCSServiceRequest.EXE that provides options when installing the components of the program.

## Components in this Setup

**The Core Component of the program is the Service Request folders. These must be installed first. The EXE is run from a computer with Outlook client (not the Exchange Server). This installation is run one time by one user to install the set of Service Request folders.**

**The Client Component is needed on computers that will use Outlook to access the Service Request system. This may be all users or just your staff that manages the tickets. If users are using the Web or sending in emails to generate tickets (that is, not using the Outlook forms and folders to create and view tickets), they will not need the Client Components installed.**

**Installing the Service Request folders:** During the initial installation, the Service Request folders are set up in a location the installer chooses either in the Exchange "Public Folders" or in a Mailbox. This component has to be installed first. It only has to be installed one time. It can be installed from any machine that has Outlook 2003, 2007 or 2010. Installing this "Service Request Folder" component also installs the client component on the current machine.

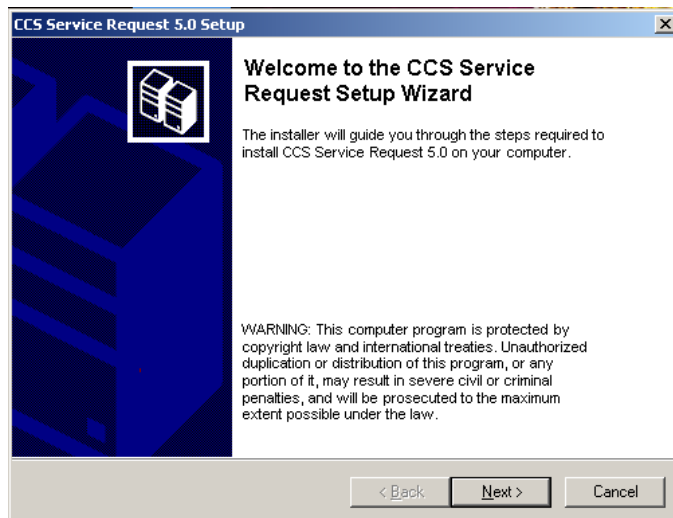
**Using Client-on-Demand:** Any user in your organization who will use Outlook client to interact with CCS Service Request 5.0 needs to have the client components installed on his/her machine. The client installation can be automated by our "Client on Demand" feature or it can be run manually by each user. The "Client-on-Demand" is the preferred method as it removes the need to install client components manually on each user's machine.

During the initial installation of the Service Request Folder, the installer can choose the "Enable Client-on-Demand" option, thereby making the client installation automated. The client components will install when the user first accesses the Service Request folders. "Client on Demand" can also be set up after the initial installation.

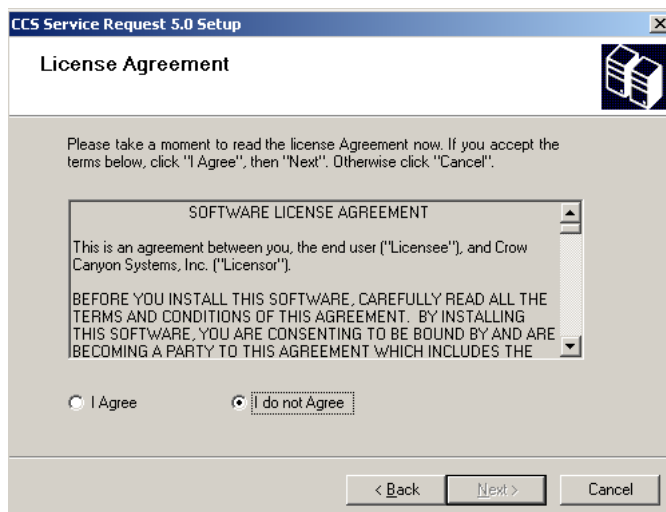
**Installing Client components manually:** As mentioned above, Client on Demand is the preferred method of client distribution. However, there are some cases where a manual install is better or is the only option. In those situations, users can install the client components manually using the same setup EXE as the initial installation. When the setup EXE is run, only the option to "Install Client Components" is selected.

## Running the Setup (Step-by-step)

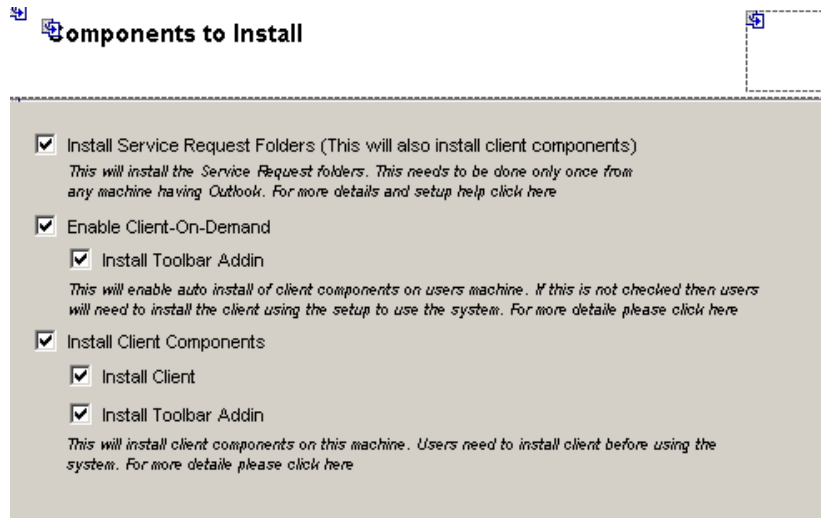
Copy the setup file (CCSServiceRequest.exe) on the machine to C:\CCS (or D:\CCS). You most likely will have to make this directory. **Do not run the setup from network location or the Exchange Server. Do not run from the Desktop or any other directory under a user profile. Also, make sure the file is unzipped when you run it.** Run the setup by double clicking the setup file. For Windows Vista and Windows 7, right-click on the setup file and select “**Run as Administrator**” from the context menu.



Click “Next” on the above screen to proceed.



Select “I Agree” after going through the license agreement to proceed further. “Next” button will be enabled when the user selects “I Agree”. Click it to continue.



Choose the components you wish to install. You can choose all or any of the components.

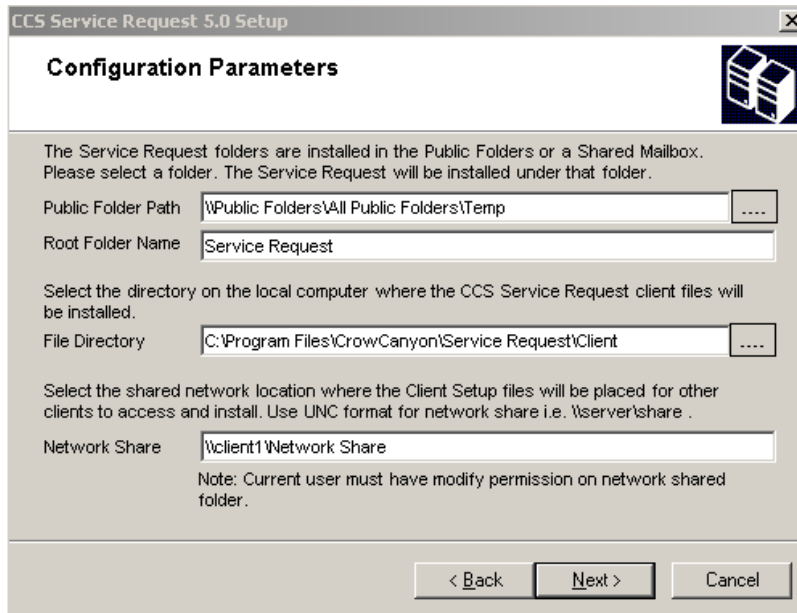
**Install Service Request Folders** - This will install the Service Request folders and must be run first to set up the system. This only needs to be run once by one person. Install from a machine with Microsoft Outlook 2003 and above. Installation of Service Request Folders also installs client components on that machine. The next screen will allow the installer to select the folder location

**Enable Client-On-Demand** – This will enable auto-install of client on users’ machines. The client components are placed on a network share and when another user first accesses the Service Request folders, the components are automatically downloaded and installed. If Client on Demand is not used in your organization, Outlook users will need to run this Setup on their machine and choose only “Install Client Components”. Note that during the initial installation (when “Install Service Request Folders” is checked), the client components are installed on the installer’s machine.

**Install Client Components** –This is for manual installation of the client AFTER the initial installation is run. You would not use this when first installing the Service Request folders, because the client files are automatically installed as part of the initial setup.

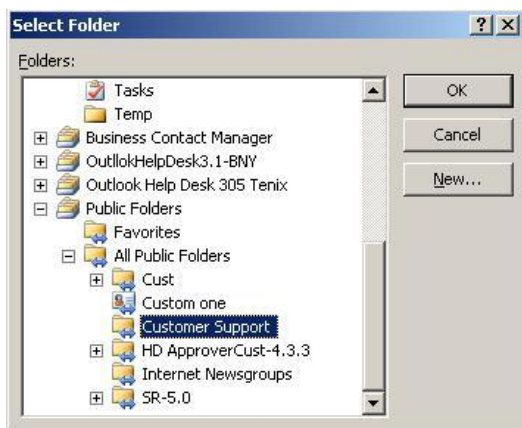
However, if you either choose not to run Client on Demand, or you need to later install a client, run the Setup on the individual machine where you want to install the client components, and choose ONLY “Install Client Components”. This has two sub components: “Install Client”, which is mandatory, and “Toolbar Add-in” (adds “New Ticket” button to Outlook toolbar), which is optional.

After selecting components to install on the above screen, click on “Next” button to continue.



**Public Folder Path** – If you have selected “Install Service Request Folder”, use the browse button on the right to select the folder under which Service Request and its sub folders will be created (see sample screen below). If “Install Service Request Folder” is not checked, the Service Request folders should already be in place; in this case, select your existing “Service Request” folder using the browse button.

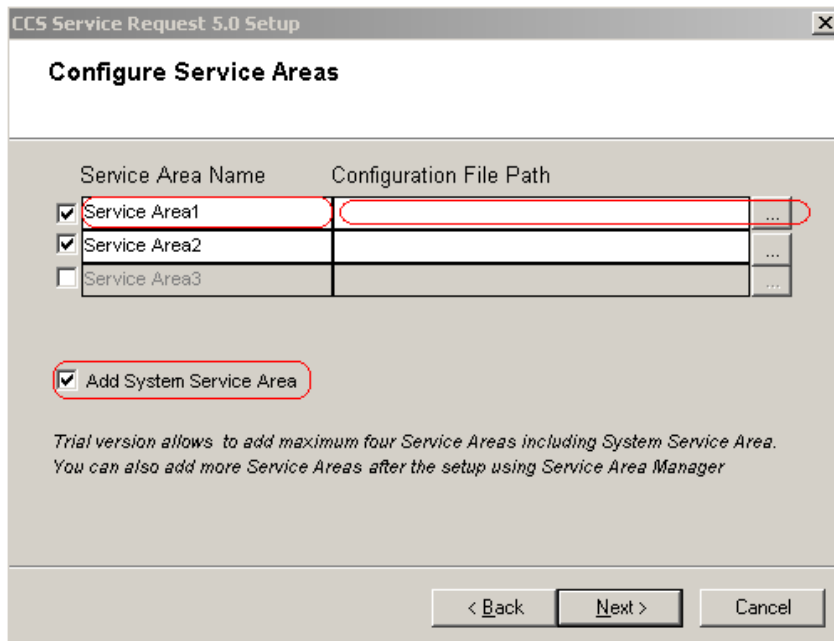
**Root folder Name:** This is the name of the root folder of the Service Request system. The default name is “Service Request”, but this can be changed here, if desired.



**File Directory:** Select the directory on local machine where the CCS Service Request client components will be installed.

**Network Share:** Provide shared network location where the client setup files will be placed for other users in your organization to access and install client components as part of Client-on-Demand. The share must allow read permissions for all users and read/write permissions for the installer. The path must be entered in UNC format.

After filling in the required details, press “Next” to continue.



## Overview

“Service Areas” are a set of folders under the Service Request system where one group or department will assign, work on, and manage their own set of tickets. Each area has its own settings, permissions, Named Seats, and licensing. Each area represents a functional area, such as Help Desk, Customer Support, Customer Service, HR, Facilities, etc.

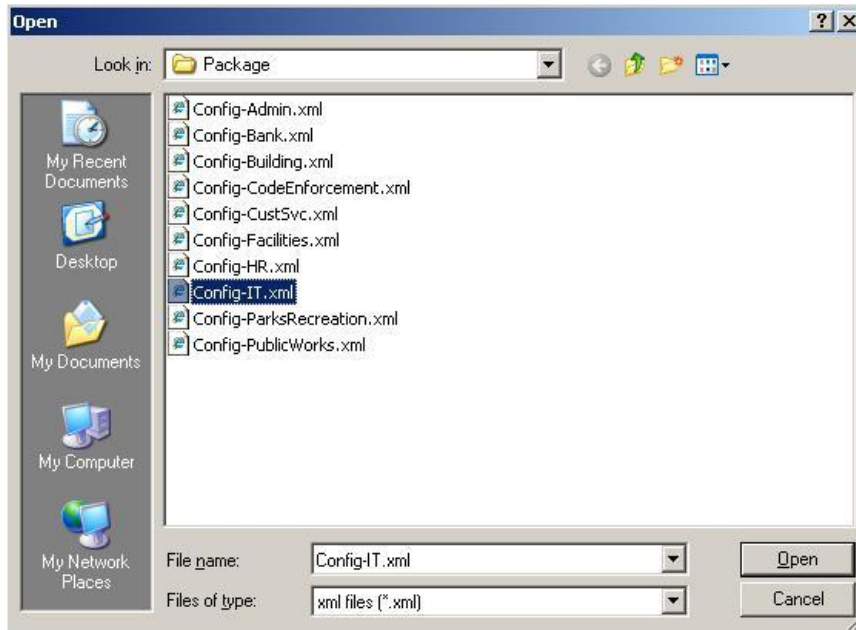
The Trial Version (and the Upgrade files before the license is entered) comes with the option to set up three Service Areas. One, two, or all three can be set up at this point. Note that Service Areas can be added or removed with ease from within the program after installation. Also, a full license will allow whatever number of Service Areas that are purchased.

The “System Service Area” is used in configurations where the tickets are first entered in one location and then dispatched by staff to individual Service Areas. In most installations, the users will submit tickets directly to the Service Area that deals with the type of request. But in some installations, all tickets will go to a central location (the System Service Area) and then be distributed by one or more staff members who “dispatch” the tickets to the proper Service Area.

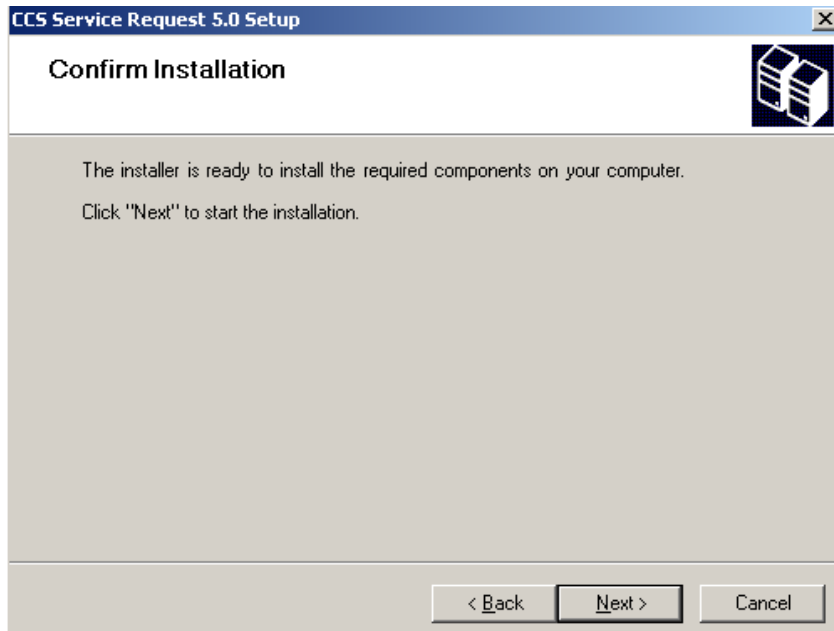
## Configure Service Areas screen

Select or de-select the checkboxes in the “Configure Service Areas” screen to create the desired number of Service Areas. The Service Area name can be changed in Service Area Name field. The utility and list settings for a Service Area can be configured by providing the path to a configuration file. We provide a number of XML-based “templates” for the Service Areas. Click on browse button as shown below. If there is no configuration file available, then leave the field blank and the Service Area will be created with default configuration and can later be configured. The default configuration is for an IT Help Desk.

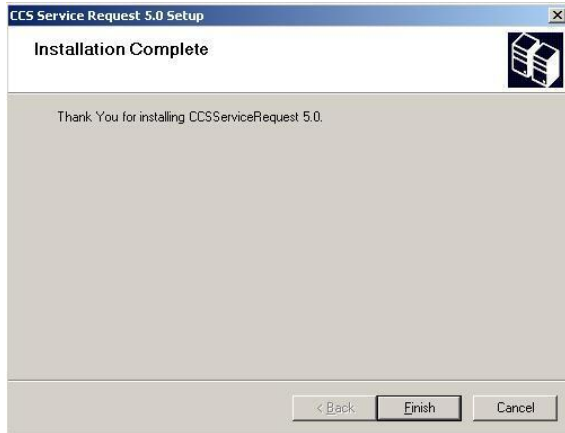
## Choose a Configuration File Path



After configuring Service Areas, click on the “Next” button to continue.



Click “Next” button to start installation for CCS Service Request 5.0. This will start the installation and end with the final page as shown below.



CCS Service Request setup ran successfully and installed the components you have chosen to install. Please click "Finish" to complete the setup.

## Permissions on the Folders

Once the Service Request folders are installed, set permissions for the folders as follows.

At least one user needs to be the Owner of each folder to make permission changes and manage the folder. Permissions can be set by the Owner in the Outlook client by right-clicking each folder, then going to Properties, Permissions tab. Alternatively, permissions can be set using Exchange System Manager or, in Exchange 2007, the Public Folder Management Tool, in the Client Permissions of the folder. While setting permissions, remove any "NT-User:xxxxx" entries.

Note: "Anonymous" needs to be set to "Contributor" for any folder that will receive emails from outside people. Otherwise, Anonymous can be set to "None" or removed from the folder permissions.

### **Service Request and all top-level Service Area folders**

Default = Author

Staff = Editor

### **Assigned Tickets & Completed Tickets**

Default = Reviewer

Staff = Editor

### **Knowledge Base**

Default = Reviewer

Staff = Editor

### **Reports**

Default = Reviewer

Staff = Editor

### **Utilities folder and all folders under it EXCEPT Record Lock**

Default = Reviewer

Staff = Editor

### **Record Lock**

Default = Editor

Help Desk/IT staff = Editor

## Further Configuration

To further configure your installation, you can set up the following in the folders under Utilities in each Service Area:

- 1) Add yourself and other staff members as “Named Seats” in the License Utility that is in the License folder under Utilities in each Service Area.
- 2) In General Utilities folder for each Service Area:
  - a. Configure lists in List Manager
  - b. Set the Ticket Colors
  - c. Set the required and hidden fields (if any) in the Field Manager Utility
  - d. Configure a Popup Message, if desired
- 3) Set up Notifications in the Notifications folder under Utilities
- 4) Set up any Templates in the Templates folder under Utilities

The usage and configuration options are described in the Admin Manual for CCS Service Request 5.0.

If you need assistance, contact support at [support@crowcanyon.com](mailto:support@crowcanyon.com) or see <http://support.crowcanyon.com>. To purchase the program or additional Service Areas or Seats, contact [sales@crowcanyon.com](mailto:sales@crowcanyon.com) or go to <http://www.crowcanyon.com/purchase>.

***Thank you for installing CCS Service Request!***

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## More Information

### Installation of the Event Sink, Web files, and CCS Business Administrator

The Standard and Pro versions include additional components that require setup on the Exchange and web server. Installation of these is described in separate manuals, which are included in the download for these “optional components”. These components are:

#### Standard Version

**Event Sink to convert emails to tickets** – any of the Service Area top-level folders can be “mail enabled” so as to accept emails. We provide an Event Sink that runs on the folder and automatically converts the emails into tickets.

**Web Pages** – We provide web files that allow users and staff to create and view tickets using a web browser.

#### PRO Version

**The PRO version includes the Standard components plus:**

**Enhanced Web Pages** – These allow staff to not only create and view tickets, but also to modify and close tickets over the web.

**CCS Business Administrator** – This installs **Ticket Escalation** and **Automated Ticket Export to SQL**.

More information on PRO features is available at: <http://www.crowcanyon.com/HelpDesk-Pro-Features.html>

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## Upgrading from Previous Versions

**For current customers of Outlook Help Desk, CCS Help Desk 4.x, or CCS Service Request 4.x:**

CCS Service Request 5.0 is a major upgrade to both the Help Desk and Service Request family of programs. The 5.0 release is available free of charge to customers with one of our Premium Annual Support Contracts (for those with customized versions, there may be charges for putting those same customizations into the current version). Those without a Premium Support Contract can purchase one at the following link: [http://www.crowcanyon.com/support/support\\_contract.asp](http://www.crowcanyon.com/support/support_contract.asp).

The upgrade process consists of copying the new set of Outlook folders into the Public Folders, then running the Upgrade Utility to move data from the former program to the new one. The Upgrade process is described in detail in the separate **Upgrade Manual**, which is in the program download.

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## Uninstalling

To uninstall CCS Service Request, take the following steps:

- 1) Delete the set of Service Request public folders. Make certain you want to take this step first, as once the folders are deleted, the tickets and settings are gone. You can archive the folders to a PST file if you wish to retain the ticket data.
- 2) On Outlook clients with CCSSR50.dll and CCSSAFE.dll installed, you can either leave them there as they are only activated when our program accesses them or delete them by unregistering them (with REGSVR32 /u switch) and then deleting the dll files. These files are usually in the Program Files/Crowcanyon directory on the client.

