

# Team Helpdesk for Outlook

## *Managerial Installation and Configuration*

Team Helpdesk System consists of two separate installs – **managerial** and **client**. The managerial install is for helpdesk administrator who would configure and maintain the Team Helpdesk folders, drop down lists, templates, FAQs and other helpdesk settings. Whereas, the client install is for the technicians to enable them to work on support cases in Outlook with the configured Team Helpdesk folders.

*(Note: if the administrator needs to work on support cases, then the client tool also needs to be installed, apart from the managerial portion).*

**Download link:** <http://www.assistmyteam.net/TeamHelpdesk/download.asp>

The downloaded zip file (TeamHelpdeskSetups.zip) contains 3 files – *TeamHelpdeskManagerSetup.exe*, *TeamHelpdeskClientSetup.exe* and *VersionInfo.txt*. Extract these file contents to a file folder.

**TeamHelpdeskManagerSetup.exe** – As the name implies, this install is meant for the helpdesk manager/administrator to configure and maintain the Team Helpdesk settings data. This tool also enables the administrator to automate support cases creation and also process support requests coming from the Caller/Technician Web Access websites.

**TeamHelpdeskClientSetup.exe** – This install is meant for technicians who would be working on support cases in the configured Outlook folders. Before you install the client tool, make sure the Team Helpdesk Outlook folders had been already configured by the manager and that you know the location of these Outlook folders (ask your helpdesk manager for the location if required eg. *\\All Public Folders\Public folders\Team Helpdesk\Ongoing Cases*). This is required because you will be asked to specify the configured Team Helpdesk 'Ongoing Cases' subfolder once you start Outlook (for the purpose of linking up the client tool with the Team Helpdesk outlook folders and is required one time only).

**VersionInfo.txt** – This text file contains the current version of the Team Helpdesk Client. This file is used for enabling automatic upgrade of the client tool (if enabled by the helpdesk administrator).

It is recommended that you place the client setup files (TeamHelpdeskClientSetup.exe and VersionInfo.txt) on a shared network folder, such that all technicians can have access to it, and ease the installation and upgrade process.

### **Parts:**

- a) [Managerial Installation & Configuration](#)
- b) [Managerial Configurations](#)

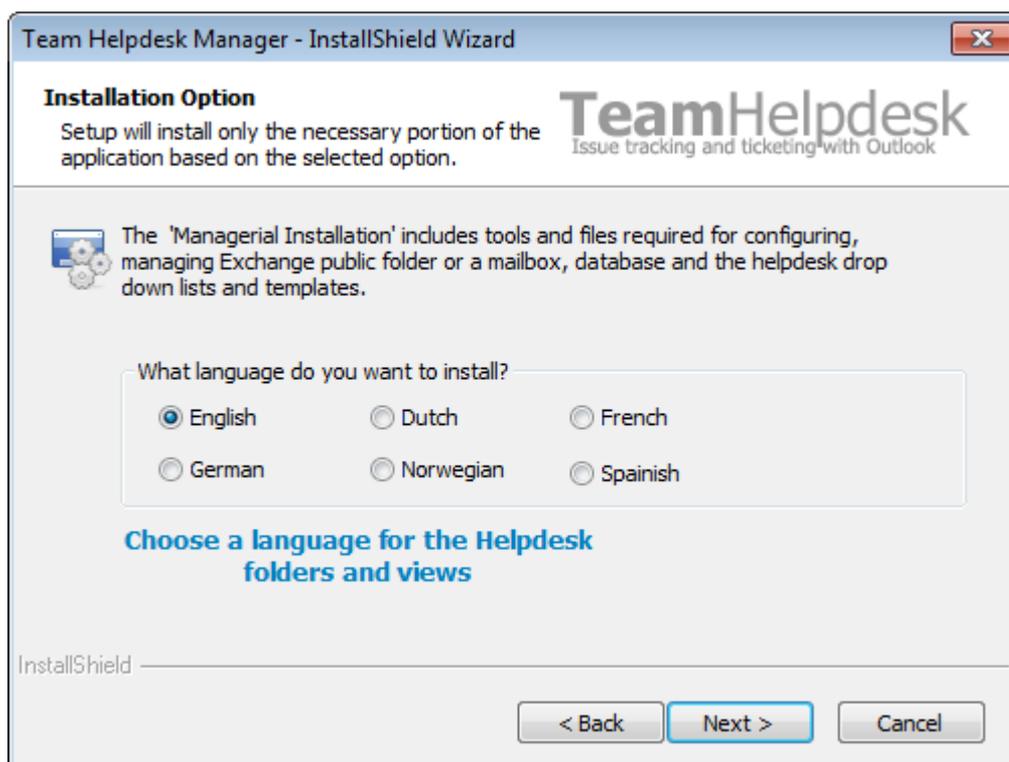
### a) Managerial Installation

The managerial installation consists of server tools and files, for creating the Team Helpdesk Outlook folders, and for configuring and maintaining the settings of the helpdesk. It has to be performed by the helpdesk administrator/manager before the client tool is installed on every technician's system.

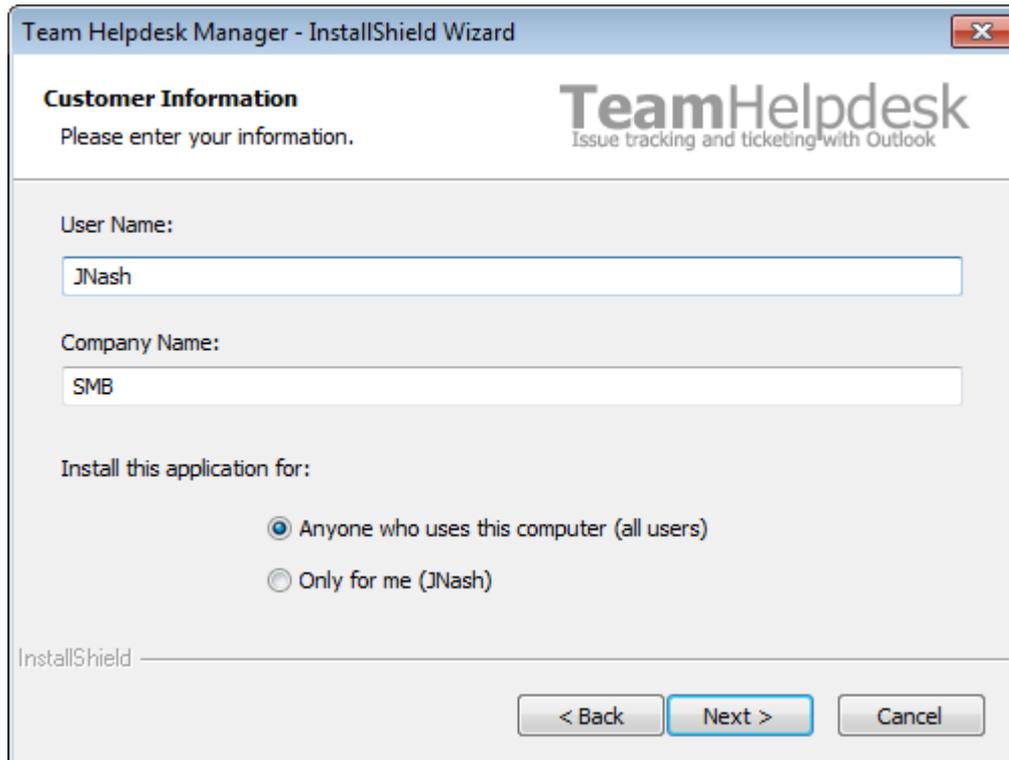
**Step 1.** Run the *TeamHelpdeskManagerSetup.exe* to start the installation. Click Next to Continue. If Outlook 2003 (SP2 or above) or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.



**Step 2.** In the 'Installation Option' dialog, select the language for the Team Helpdesk folders and forms to be used and click Next. By default, English is the selected language.



**Step 3.** In the 'Customer Information' dialog, you will be prompted to select if the application has to be installed for all users or only for yourself (current user).



Team Helpdesk Manager - InstallShield Wizard

**Customer Information**  
Please enter your information.

**TeamHelpdesk**  
Issue tracking and ticketing with Outlook

User Name:  
JNash

Company Name:  
SMB

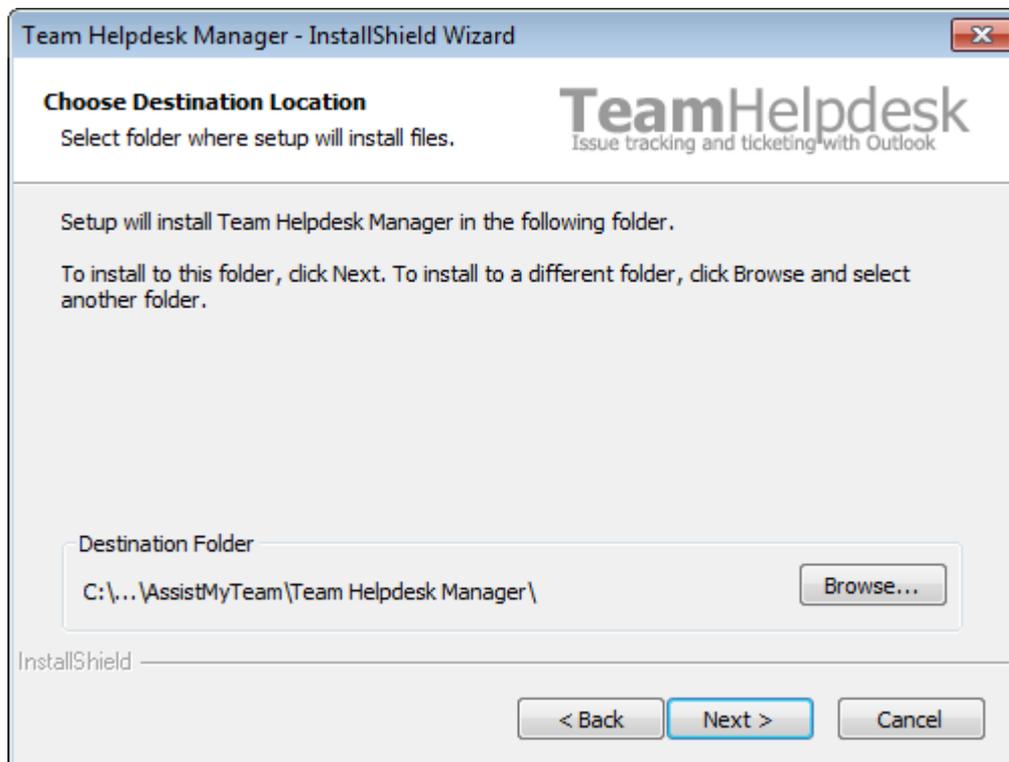
Install this application for:

Anyone who uses this computer (all users)  
 Only for me (JNash)

InstallShield

< Back   Next >   Cancel

**Step 4.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)



Team Helpdesk Manager - InstallShield Wizard

**Choose Destination Location**  
Select folder where setup will install files.

**TeamHelpdesk**  
Issue tracking and ticketing with Outlook

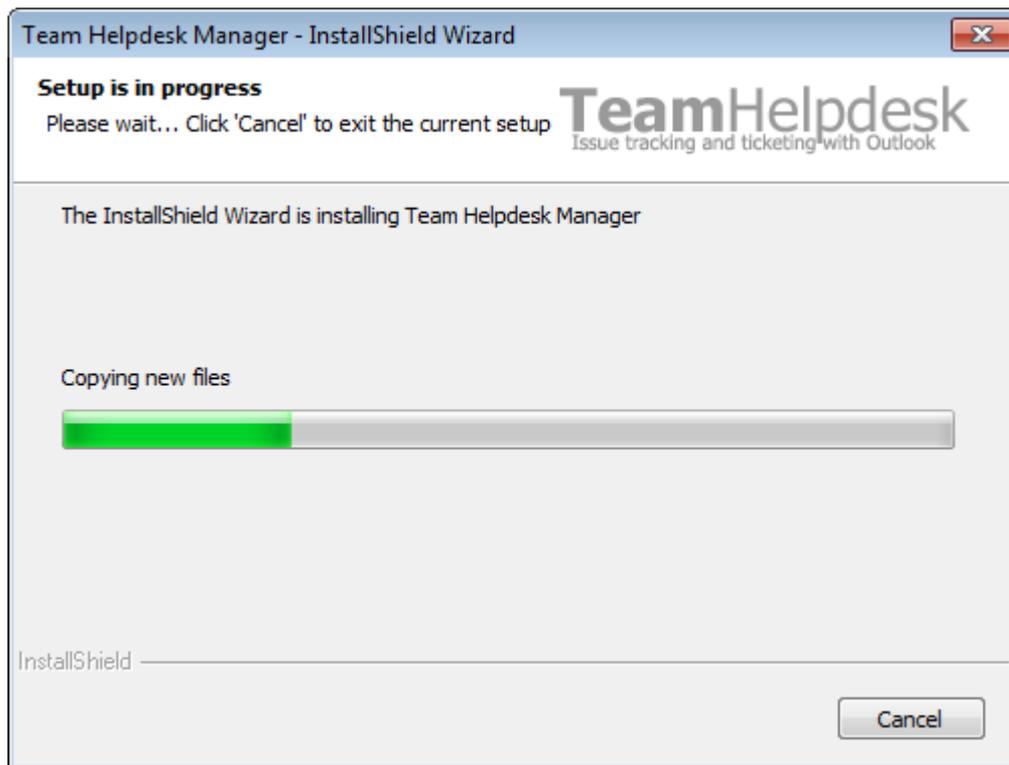
Setup will install Team Helpdesk Manager in the following folder.  
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.

Destination Folder  
C:\...\AssistMyTeam\Team Helpdesk Manager\'   Browse...

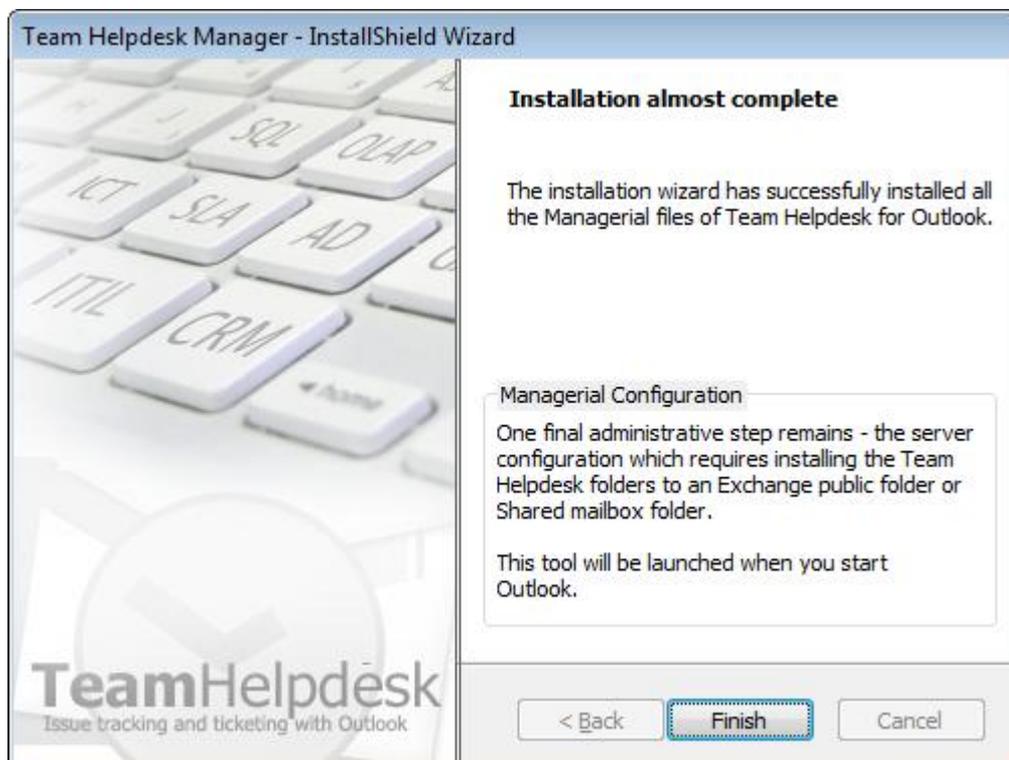
InstallShield

< Back   Next >   Cancel

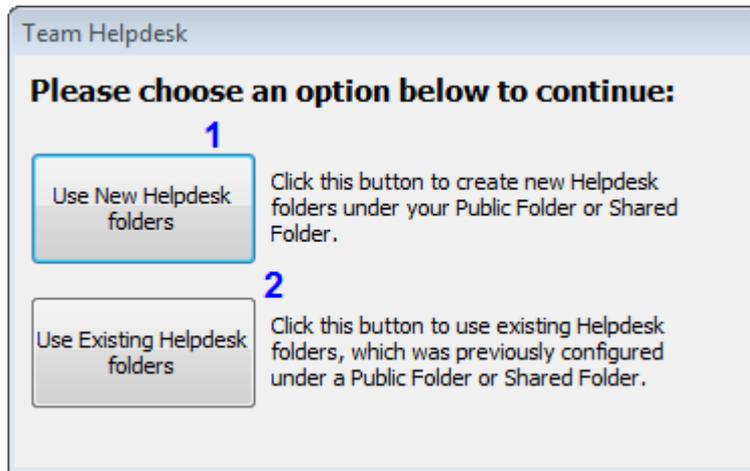
**Step 5.** Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process



**Step 6.** Click 'Finish' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



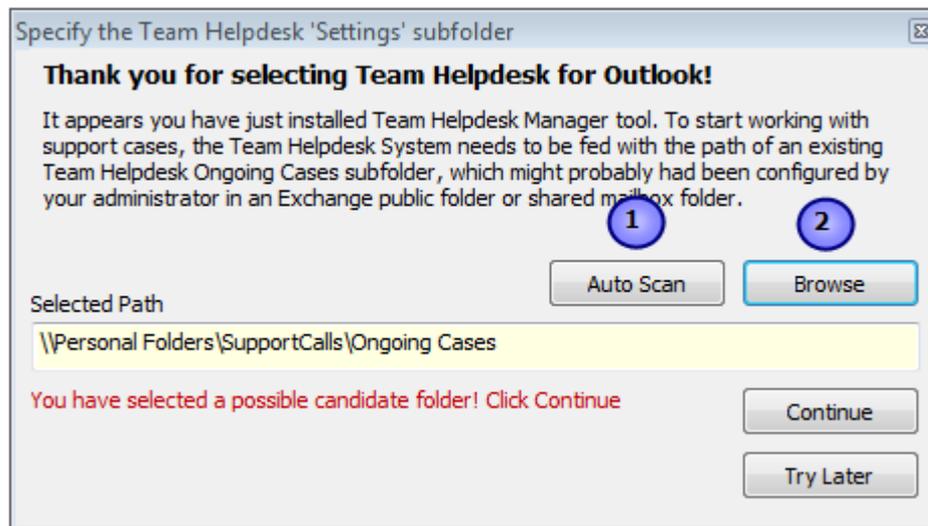
**Step 7.** Start Outlook (restart if it was already running during the files installation). As soon as Outlook is loaded, you will be prompted with the following small dialog box, offering you two choices:



**1** Create New Team Helpdesk folders – Click this button to create new Team Helpdesk folders (*i.e.*, *Ongoing Cases*, *Resolved Cases*, *KB*, *Schedules*, *History and Settings*) which are customized with Team Helpdesk specific fields, views and forms. Follow **step 8** to further go ahead with the configuration.

**2** Use Existing Team Helpdesk folders – Click this button to use existing Team Helpdesk folders (*i.e.*, *Ongoing Cases*, *Resolved Cases*, *KB*, *Schedules*, *History and Settings*) which had been already configured by another helpdesk manager/administrator. This scenario is generated when multiple helpdesk managers/administrators install the Team Helpdesk Manager.

You will be given the option to select the existing '**Settings**' subfolder, to link up the Team Helpdesk Manager add-in with the existing Team Helpdesk folders and database.

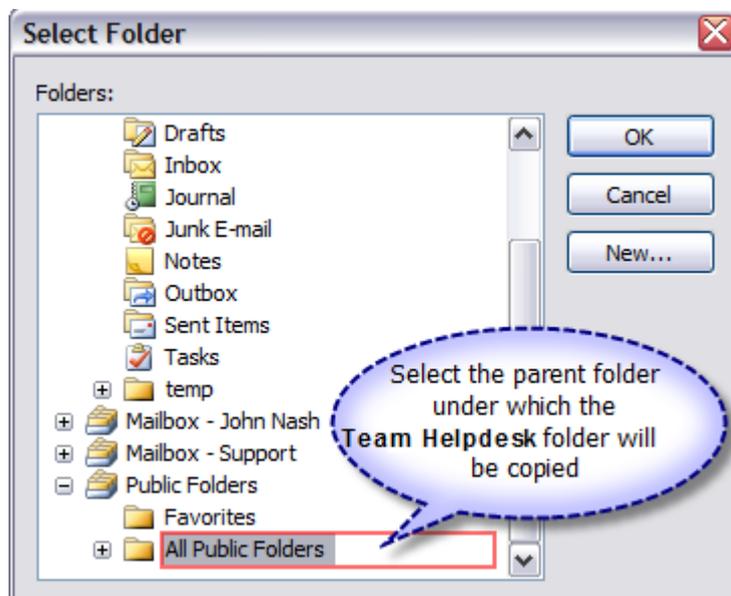


Either you can **auto scan (1)** to search for the first available '**Settings**' subfolder. If you already know the location of the existing Team Helpdesk folders, you can simply click the '**Browse**' (2) button to specify the '**Settings**' subfolder from your Outlook. Once you have selected the path to the '**Settings**' subfolder, click 'Continue'. Steps 8 and 9 would be not applicable, with this route.

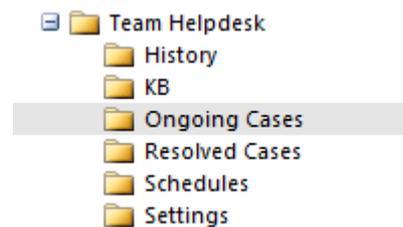
**Step 8.** A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent Team Helpdesk folder that will be created. By default, it has a title of 'Team Helpdesk'.



**Step 8.** Clicking 'Next' button would enable you to select an Outlook parent folder where the specified Team Helpdesk root folder would be created. If Microsoft Outlook is not already opened, it would be started automatically.



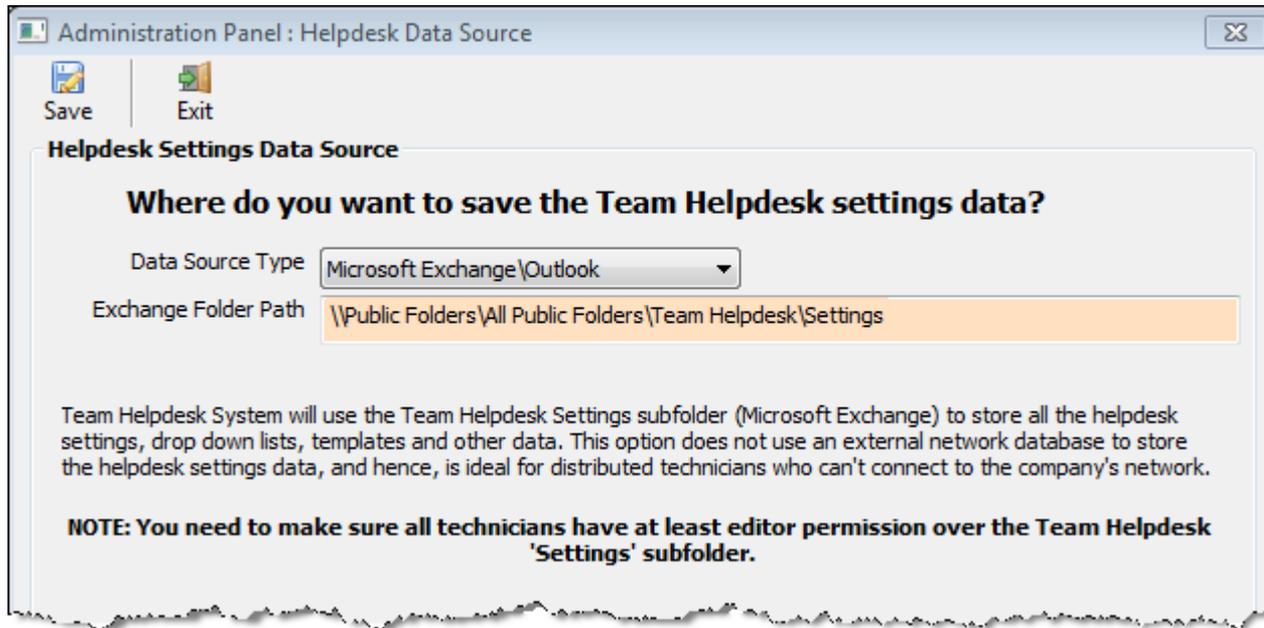
The tool would then copy Team Helpdesk subfolders, forms & designs, views etc. from the Team Helpdesk PST template file (TeamHelpdeskPST.pst). It would look like the followings layout:



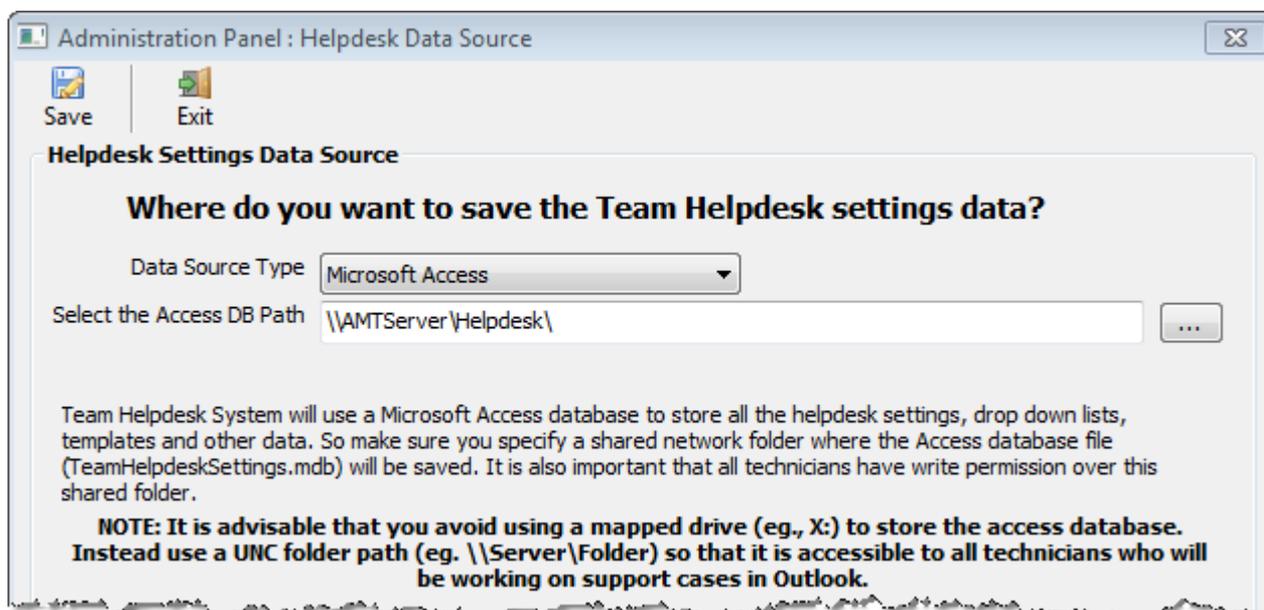
**NOTE:** When you start Outlook, if you are not prompted for the option to copy a new Team Helpdesk folder, or choose existing one, then most likely, there might be remnants of earlier installation. In such scenario, you can go to "Program Files\AssistMyTeam\Team Helpdesk Manager for Outlook" folder and run **ConfigureServerPST.exe**. That will manually invoke the wizard tool for copying a new Team Helpdesk folder to your Outlook

**Step 9.** Now, the final step is to choose a Team Helpdesk database where all the settings, templates and other helpdesk data will be saved. Support database options are **Microsoft Exchange, Microsoft Access and SQL Server.**

If Microsoft Exchange is selected, the settings data will be stored under the Team Helpdesk Settings public folder in Exchange. This option removes the dependency of an external database and works even on WAN and HTTP connection to Exchange. This database option is ideal for a helpdesk team that has fewer technicians.



If you choose Access, the database will need to be placed on a shared network folder such that all technicians working on the support cases in Outlook have access to the network folder. When you specify the location where the MDB file is to be created, make sure you choose a UNC path (eg. \\AMTServer\Helpdesk) instead of a mapped one because, a mapped drive might only be accessible to you. One important consideration with having a network Access database is the write permission on the folder and the MDB file itself. Make sure, the shared folder or the MDB file is not configured 'read-only' for all technicians on the network, otherwise, technicians won't be able to create and save cases in the Team Helpdesk Cases folders in Outlook.



When using a network Access or SQL Server database, it is important that it is configured in a way that it is accessible on the network by all support staffs. Note that, Team Helpdesk with a dedicated database only works on local network. This database option is ideal for a helpdesk team that has a large number of technicians.

It is recommended to use a dedicated SQL Server database option, if you have a large number of users/technicians working on support cases, as it gives a better performance.

**Where do you want to save the Team Helpdesk settings data?**

Data Source Type: Microsoft SQL Server

Server: AMTSERVER\SQLSERVER

Database: TeamHelpdeskSettingsDB

UserName: [Empty]

Password: [Empty]

Use Integrated Security

Team Helpdesk System will use a Microsoft SQL Server database to store all the helpdesk settings, drop down lists, templates and other data. So make sure all technicians have access to it on the network. If you are not using 'Integrity Security', make sure you use a common SQL account that would work for all technicians.

**NOTE: When choosing a SQL server database for Team Helpdesk System, if you are not using the 'Integrated Security' (also known as Windows Authentication, or NTLM authentication), then it is very important that the particular SQL user account you use here, is usable by all Team Helpdesk Clients automatically from different systems of the technicians.**

For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name 'TeamHelpdeskSettingsDB' would be created. If your SQL server is configured to use windows authentication (NTLM), then you can check the 'Use Integrity Security' option to let Windows manager the credentials to access the resources on the SQL server. One important aspect to consider when using a SQL server database is the accessibility by other technicians. That is, when other technicians install the Team Helpdesk Client, they will automatically pick up these SQL server settings to connect to the database, and hence, it is important that the specified SQL server account here (if you are not using Integrated Security, that is) is usable by all the technicians as well.

**NOTE:**

When choosing a SQL server database for Team Helpdesk System, if you are not using the 'Integrated Security' (also known as Windows Authentication, or NTLM authentication), then it is very important that the particular SQL user account you use here, is usable by all Team Helpdesk Clients from different systems of the technicians. This is because, this database information is saved globally on the exchange server (i.e, under DBSettings post item under Team Helpdesk Settings subfolder), and will be used by every Team Helpdesk Client and Manager systems. This is not an issue if you use integrated security option.

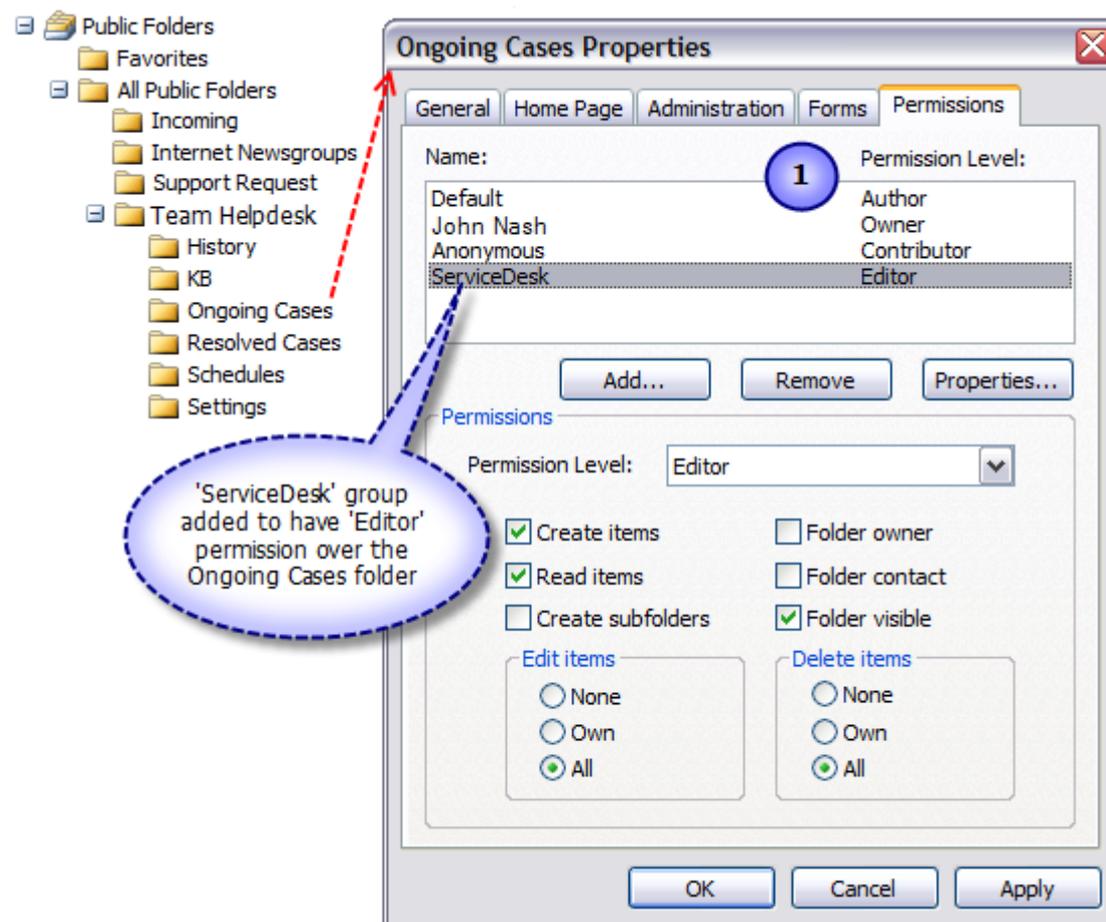
## b) Managerial Configurations

Now that you have installed - Team Helpdesk files into your system and Team Helpdesk folders into your public folder or mailbox, administrator would need to configure the permission level of each Team Helpdesk folder, namely, the History, KB, Ongoing Cases, Resolved Case, Schedules and Settings. By default, the permission on each subfolder for all users is set to 'Author'. Only the user (manager) who had performed the installation has got 'Owner' permission. Hence, it is this user (manager) who would need to grant permission to the folders for all members of the helpdesk team. Without a proper permission structure defined, technicians accessing the Team Helpdesk folders would not be able to perform most of the helpdesk tasks such as creating new support cases, working on their assigned cases etc.

The following table summarizes what permission levels are required on each folder:

Folder	Permission
History	At least ' <b>Editor</b> ' permission to all helpdesk technicians
KB	At least ' <b>Author</b> ' permission to all helpdesk technicians
Ongoing Cases	At least ' <b>Editor</b> ' permission to all helpdesk technicians
Resolved Cases	At least ' <b>Editor</b> ' permission to all helpdesk technicians
Schedules	At least ' <b>Editor</b> ' permission to all helpdesk technicians ' <b>Publishing Editor</b> ' permission to technicians with admin-access*
Settings	At least ' <b>Editor</b> ' permission to all helpdesk technicians

\*Technicians with admin access may be required to create new calendars in this folder when the 'Maintain technicians due date schedule' is enabled in Automation options.



We recommend that a users group consisting of all technicians of the helpdesk be created such that helpdesk manager (owner) can easily assign permission to the group as a whole, instead of undergoing multiple steps of selecting and granting the same permission to each technician. *In the example below, a group 'ServiceDesk' comprising of all helpdesk users is granted editor permission over the 'Ongoing Cases' folder.*

The screenshot below lists all the files that are installed on the system. Notice, that, there are additional files which forms the managerial option pack - tools to configure and install a new Team Helpdesk folder, which has to be performed only by the helpdesk administrator/manager.

Name	Date modified	Size	Type
ConfigureServerPST.exe	02-09-2010 03:34 ...	468 KB	Application
CustomerWebService.zip	14-10-2009 10:04 ...	1,185 KB	WinRAR ZIP archive
OLAPSenseLite.exe	31-08-2010 01:48 ...	235 KB	Application
RadarSoft.Common.dll	11-06-2009 05:13 ...	1,254 KB	Application extens...
RadarSoft.CommonChart.dll	11-06-2009 05:14 ...	461 KB	Application extens...
RadarSoft.WinForms.Desktop.dll	11-06-2009 05:14 ...	860 KB	Application extens...
RadarSoft.WinForms.dll	11-06-2009 05:16 ...	2,118 KB	Application extens...
RadarSoft.WinForms.Grid.dll	11-06-2009 05:16 ...	445 KB	Application extens...
RadarSoft.WinForms.GridChart.dll	11-06-2009 05:16 ...	636 KB	Application extens...
TeamHelpdeskHelp.pdf	02-09-2010 12:03 ...	10,998 KB	Adobe Acrobat D...
TeamHelpdeskManager.dll	02-09-2010 03:31 ...	3,708 KB	Application extens...
TeamHelpdeskProcess.exe	02-09-2010 03:35 ...	1,944 KB	Application
TechnicianWebAccess.zip	29-06-2009 03:25 ...	1,183 KB	WinRAR ZIP archive