AssistMyTeam Helpdesk for Outlook

Agent Installation and Configuration

This install is meant for agents who would be working on support cases from within their Outlook. Before you install the agent tool, make sure the helpdesk SQL database had been already created and configured by your manager, and that you know the database name, your credentials to the SQL server (if Windows authentication is not configured, ask your helpdesk manager). This is required because when you start Outlook after installing the Agent add-in, you will be asked to enter the SQL server logon information and the database name (if different from the default name 'AssistMyTeamHelpdeskDB').

NOTE: 'Per User Installation' and 'Per Machine Installation'

In 'Per User Installation', the install is performed 100% on the local system and nothing is installed on your Exchange or Windows Server. Further, this install is intended to serve only the current logged on user of the system/workstation and will be installed under the user's application data folder (instead of Programs Files folder) and no elevated permission is required. So, there won't be a prompt from UAC to allow this install unless you change the install directory to say, Programs Files which will warrant an elevated permission/UAC prompt. If the same system is used by multiple technicians, each of them need to install the add-in on their profile with the default installation folder location.

'Per Machine Installation': If you have the need to have a single install that serves all users of the system (i.e., the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups to perform a per machine installation.

Requirements

- Supported Outlook versions are 2010, 2013, 2016, 2019, 2021, 2024, 2026 and 365.
- .NET Framework 4.8 or higher.

Setups

There are two different setups types:

For 'Per User Installation' (ideal for standalone single user/workstation)

- AssistMyTeamHelpdeskAgentSetup_x86.exe (for 32-bit Outlook)
- AssistMyTeamHelpdeskAgentSetup_x64.exe (for 64-bit Outlook)

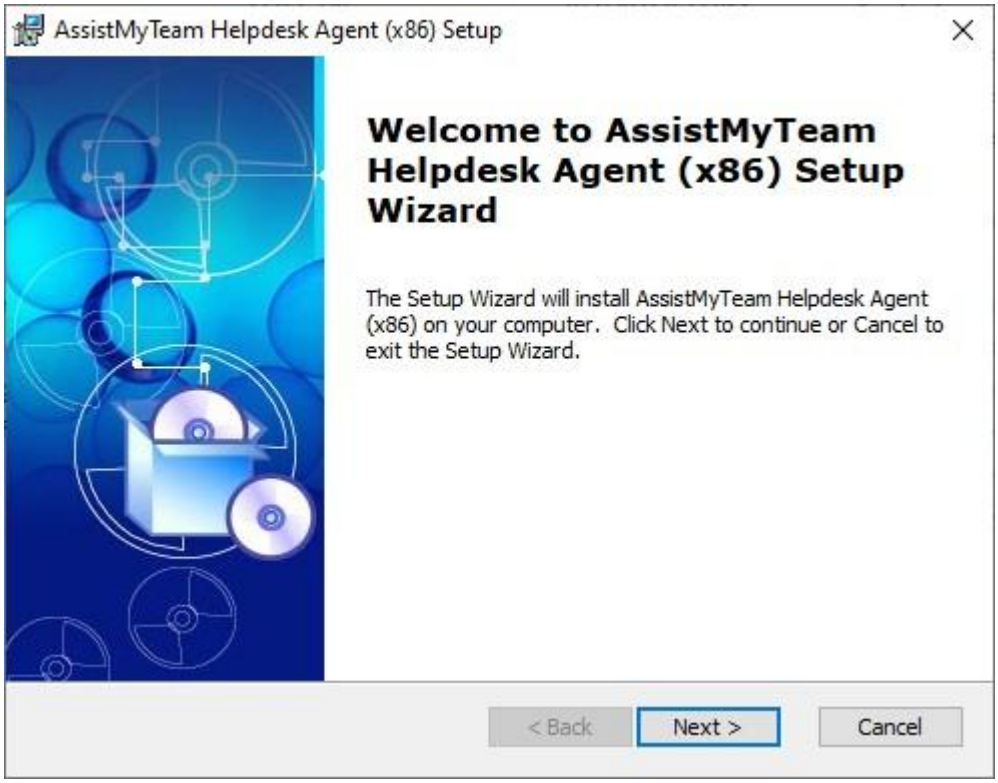
For 'Per Machine Installation' (ideal for installing on Citrix and Terminal Servers)

- AssistMyTeamHelpdeskAgentSetup_x86_Citrix.exe (for 32-bit Outlook)
- AssistMyTeamHelpdeskAgentSetup_x64_Citrix.exe (for 64-bit Outlook)

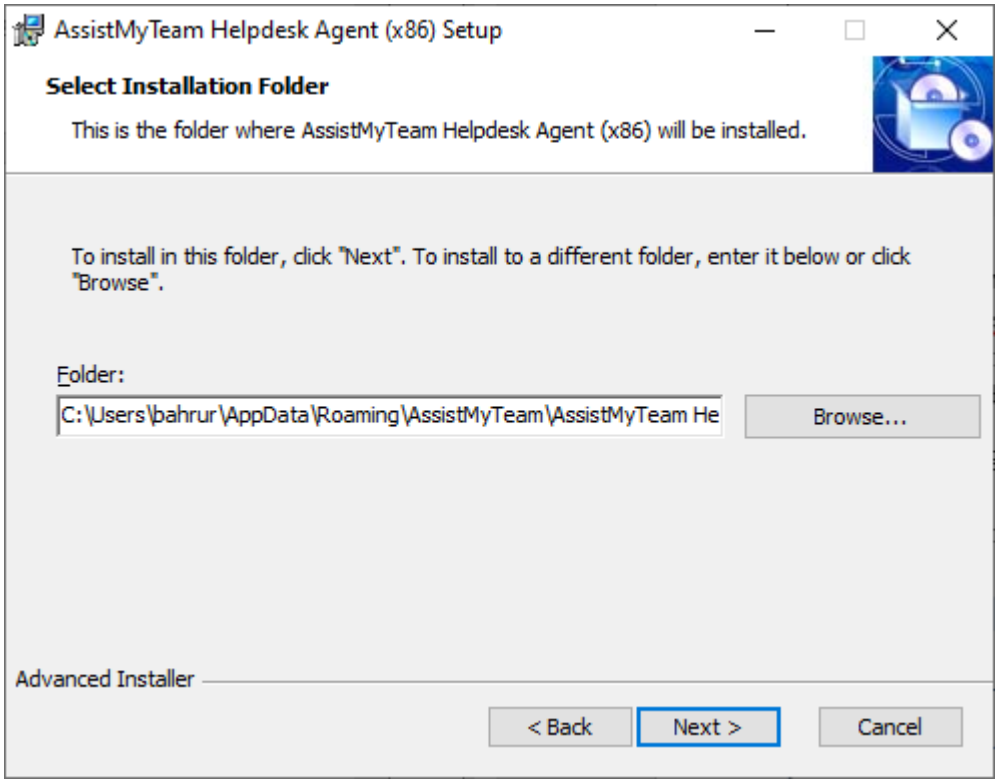
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Steps to Install and Configure

Step 1. Run **AssistMyTeamHelpdeskAgentSetup_xXX.exe** to start the installation. Click 'Next' to Continue. If Outlook 2010 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.

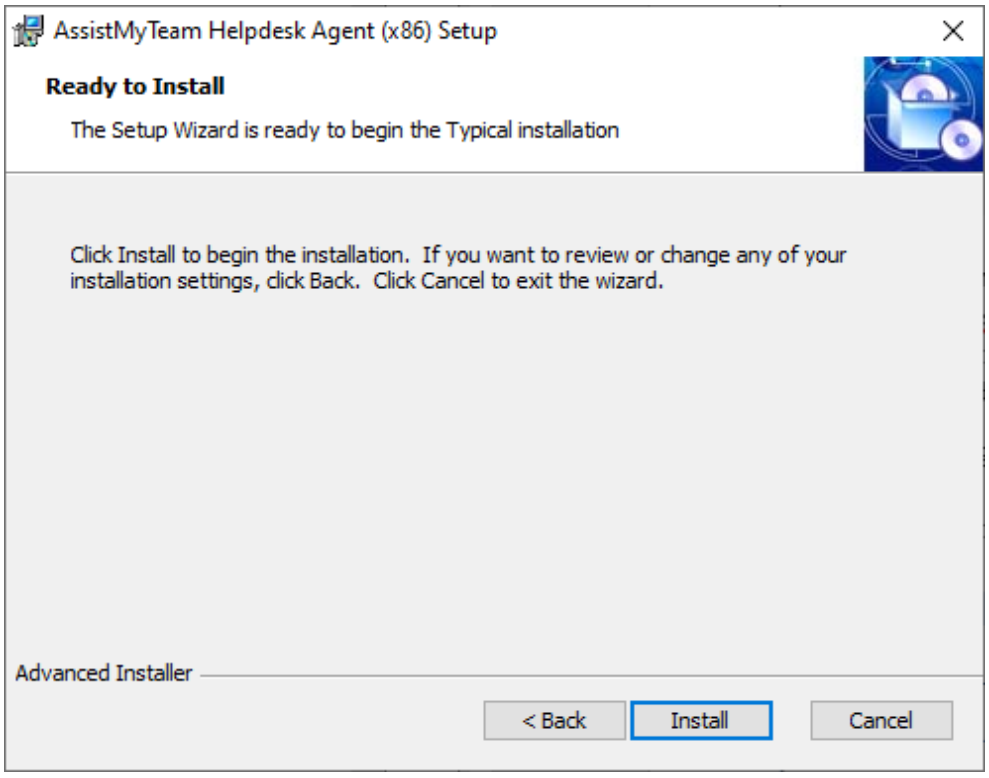


Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your application data folder)

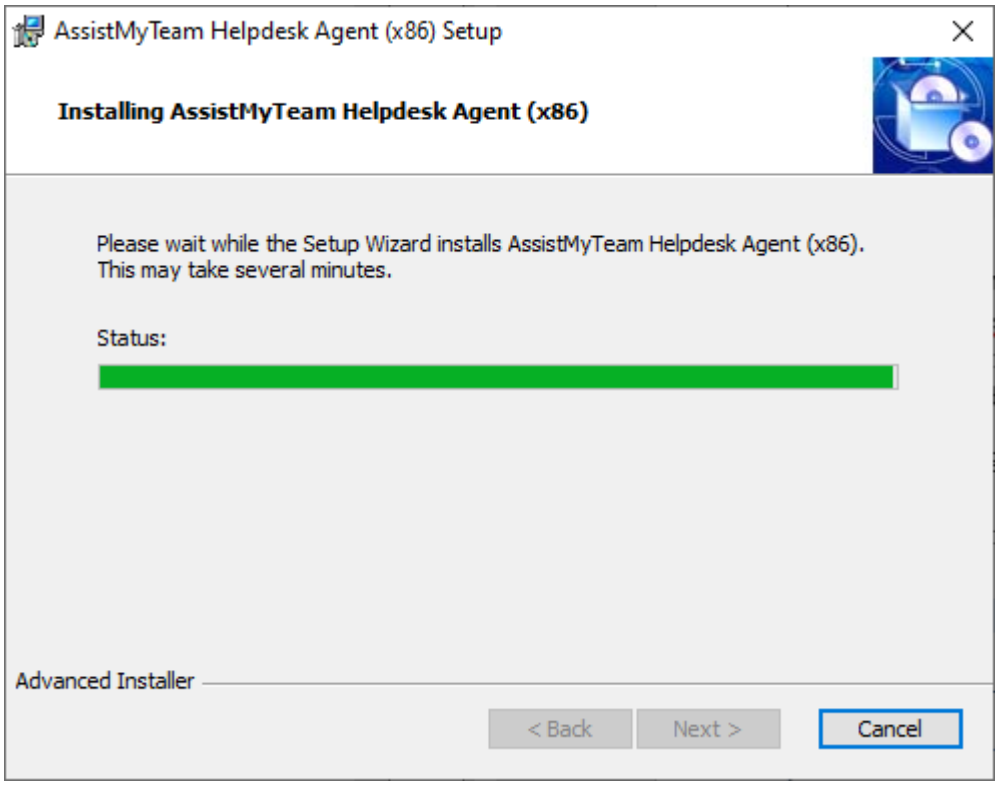


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Step 3. Click 'Install' to continue the files extraction.

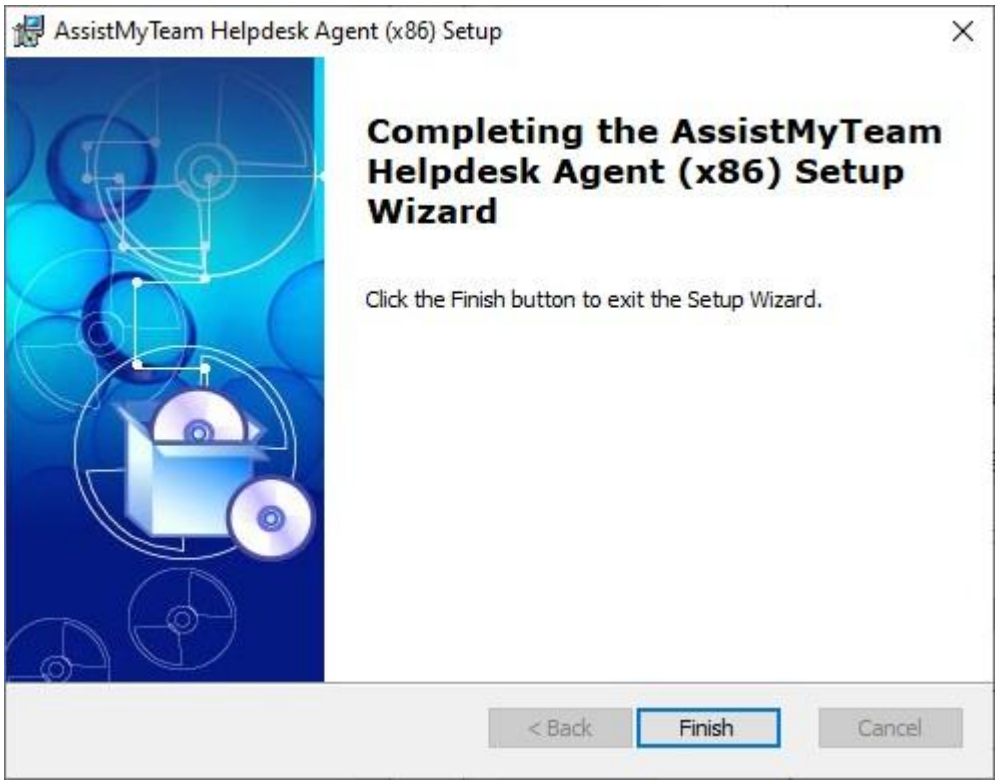


Step 4. It may take a few minutes to complete the whole copying and registration process.



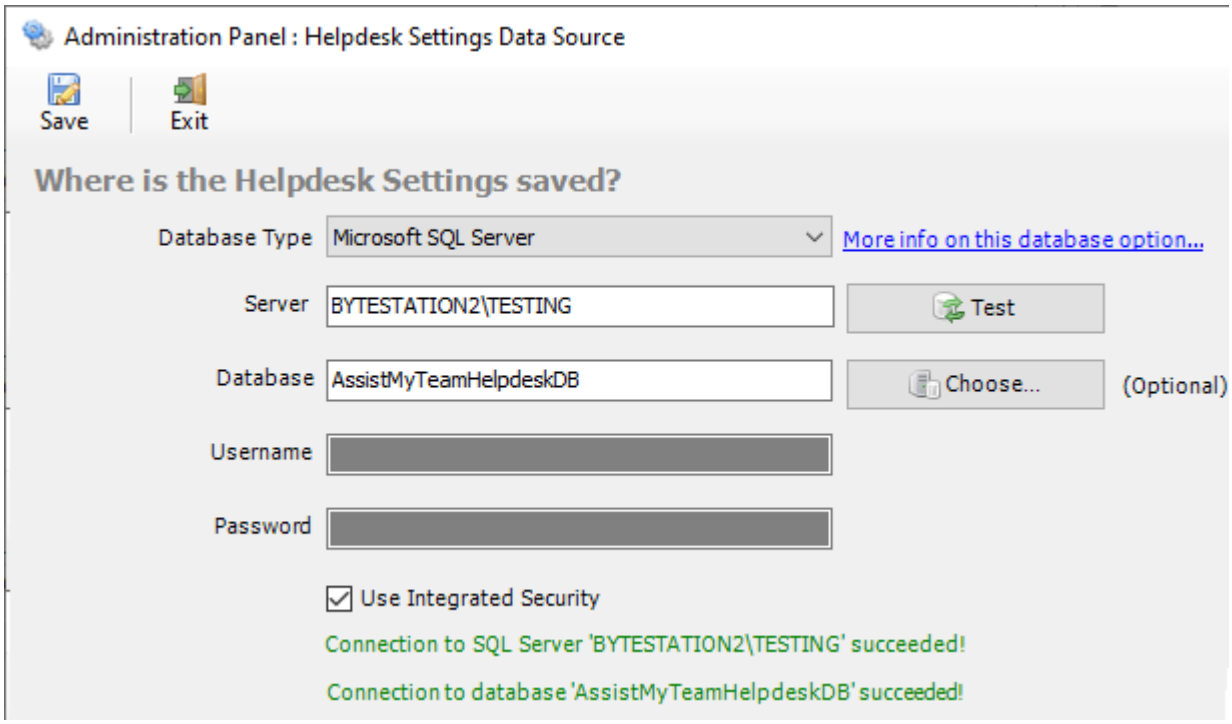
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Step 5. Click 'Finish' to end the installation wizard.



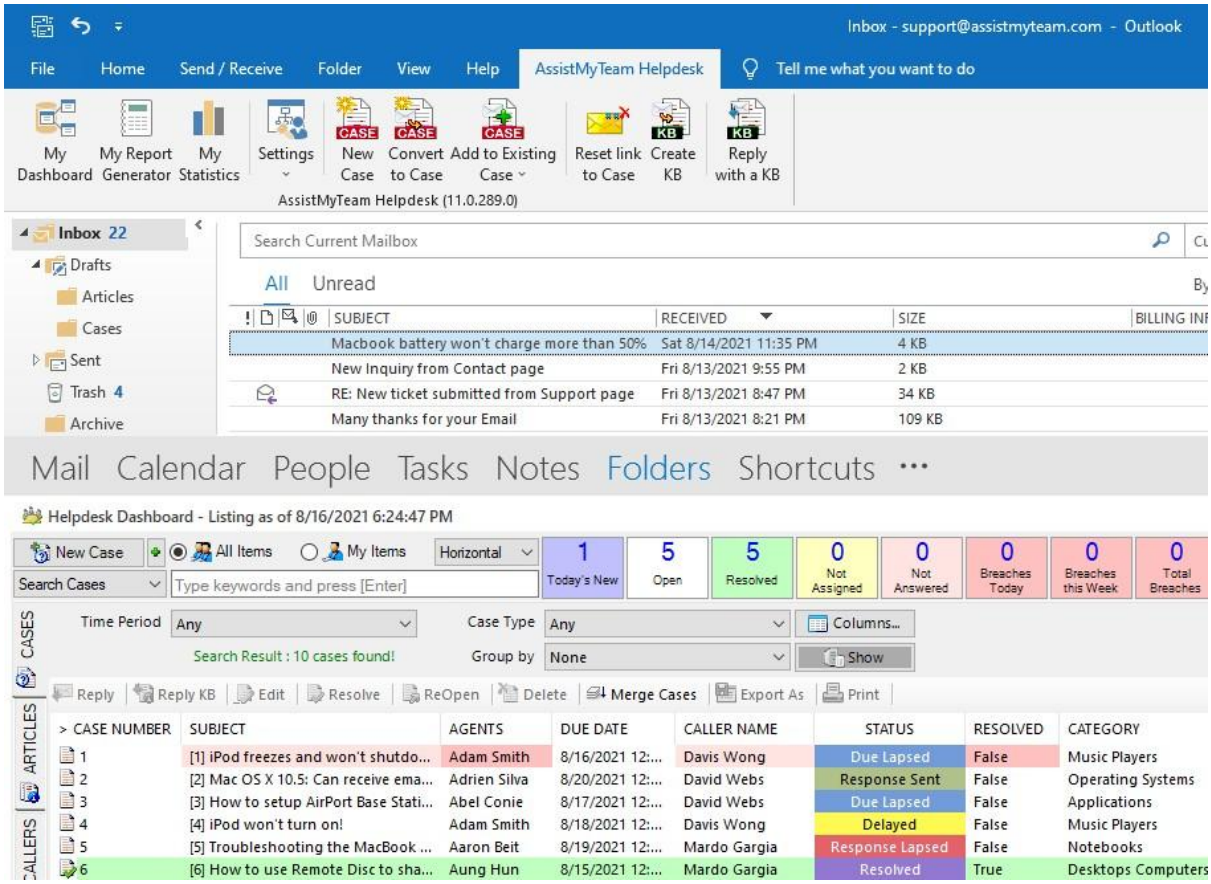
Now start Microsoft Outlook. If the agent add-in installation was successful, you will see a new menu item 'AssistMyTeam Helpdesk' in Outlook (after help menu).

Step 6. The final step is linking up your Helpdesk Agent add-in with a configured SQL Server database. When you start Outlook, you will be prompted to enter the SQL Server details so that the add-in can link up with the existing helpdesk database.



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Once you feed into the SQL Server or Azure Cloud SQL credentials, click 'Save' button. And the agent add-in is now linked and connected to the helpdesk database. Now, you would be able to raise new cases from emails, or view them in the dashboard panel.



Additional step for Agents on the SQL database

Make sure that you have adequate permission to access and update the tables in that database i.e., **db_datareader** and **db_datawriter** permission on the AssistMyTeam Helpdesk SQL database.



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Installation Folder

The installation folder in your primary drive depends on the installation type you had chosen - Per User or Per Machine.

For **'Per User Installation'**, it would be

C:\Users\[USER]\AppData\Roaming\AssistMyTeam\AssistMyTeam Helpdesk Agent (x64 or x86)

For **'Per Machine Installation'**, it would be

C:\Program files (x86)\AssistMyTeam\AssistMyTeam Helpdesk Agent (x86 or x64)

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