AssistMyTeam Helpdesk for Outlook

Manager Installation and Configuration

AssistMyTeam Helpdesk System consists of two separate installs – **Managerial** and **Agent**. The managerial install is for helpdesk administrators who would configure and maintain the helpdesk, drop down lists, templates, KB articles and other settings in the database. Whereas, the Agent install is for the agents and technicians to enable them to work on support cases in Outlook.

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 setup types:

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

- AssistMyTeamHelpdeskSetups_x86.zip (for 32-bit Outlook)
- AssistMyTeamHelpdeskSetups_x64.zip (for 64-bit Outlook)

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

- AssistMyTeamHelpdeskSetups_x86_Citrix.zip (for 32-bit Outlook)
- AssistMyTeamHelpdeskSetups_x64_Citrix.zip (for 64-bit Outlook)

Download link: SETUPS

The downloaded zip file contains 3 files: AssistMyTeamHelpdeskManagerSetup_xXX.exe, AssistMyTeamHelpdeskAgentSetup_xXX.exe and VersionInfo.txt where 'xXX' can be either x86 (32-bit Outlook) or x64 (64-bit Outlook)

Extract these file contents to a file folder. It is recommended that you place the setup files on a shared network folder, such that all users can have access to it, and ease the installation and upgrade process.

Per User Installation and Per Machine Installation

In Per User Installation the installs are 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 (This is known as per user installation). 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 user needs 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., per machine installation, which technically means 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.

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Note: If administrators need to work on support cases, the agent tool also needs to be installed, apart from the managerial portion

Managerial Installation

The managerial installation consists of administrative tools and files 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.

The Manager setup consists of two different types:

For Per User Installation:

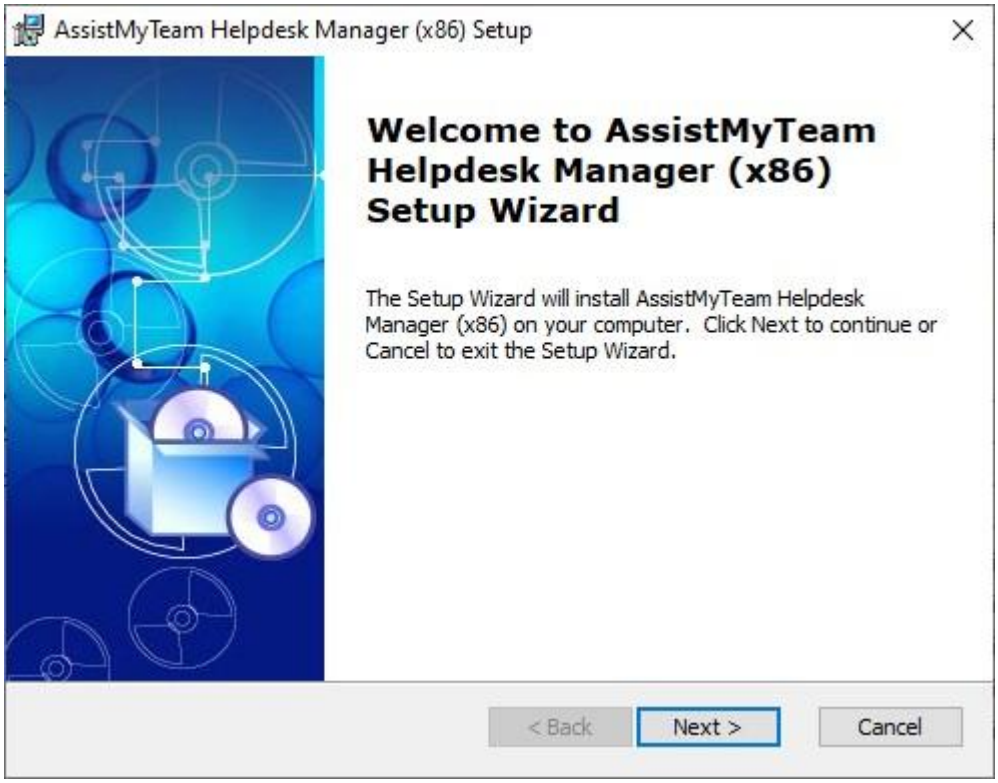
- AssistMyTeamHelpdeskManagerSetup_x86.exe (for 32-bit Outlook)
- AssistMyTeamHelpdeskManagerSetup_x64.exe (for 64-bit Outlook)

For Per Machine Installation:

- AssistMyTeamHelpdeskManagerSetup_x86_Citrix.exe (for 32-bit Outlook)
- AssistMyTeamHelpdeskManagerSetup_x64_Citrix.exe (for 64-bit Outlook)

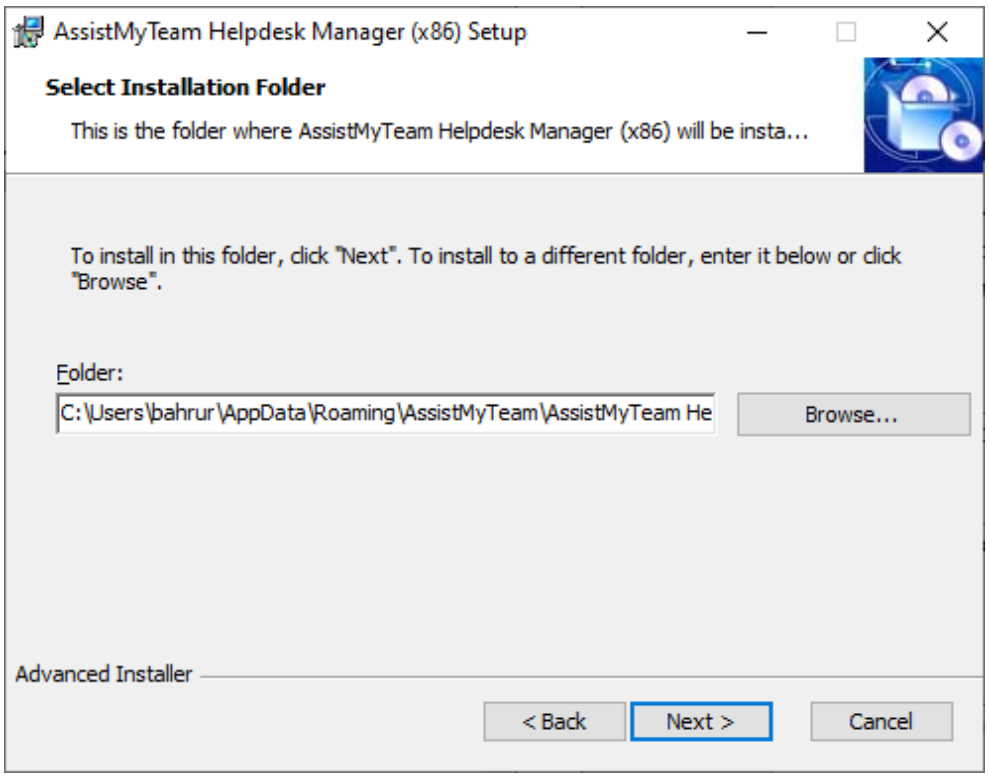
Install Steps

Step 1. Run the AssistMyTeamHelpdeskManagerSetup_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.

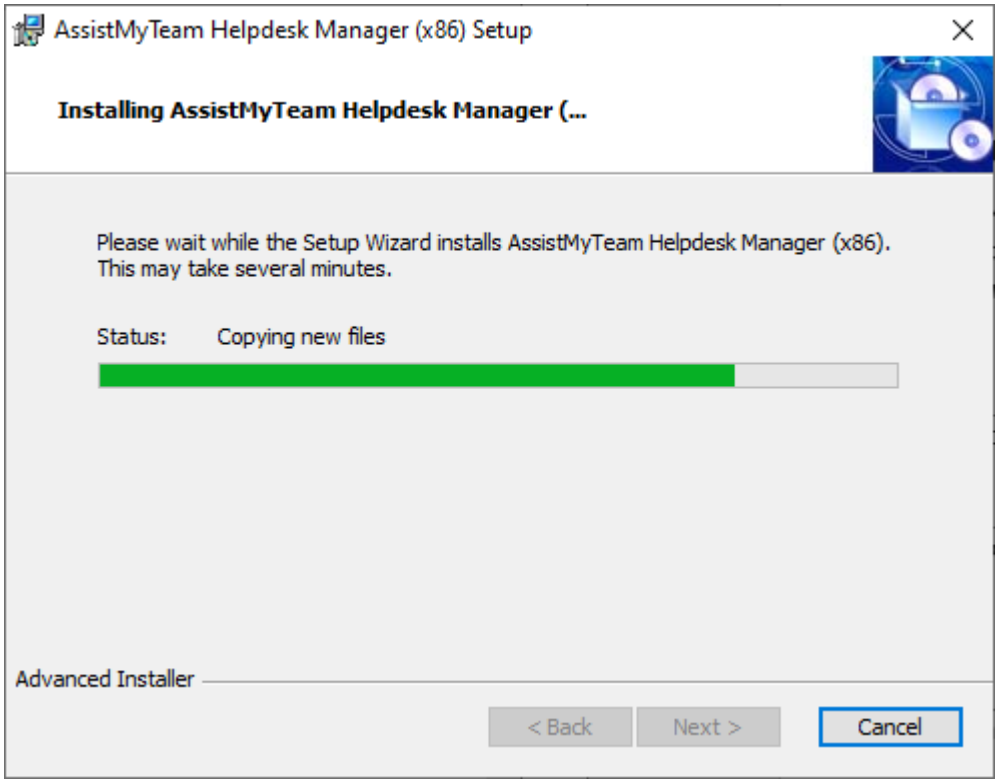


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Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your application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

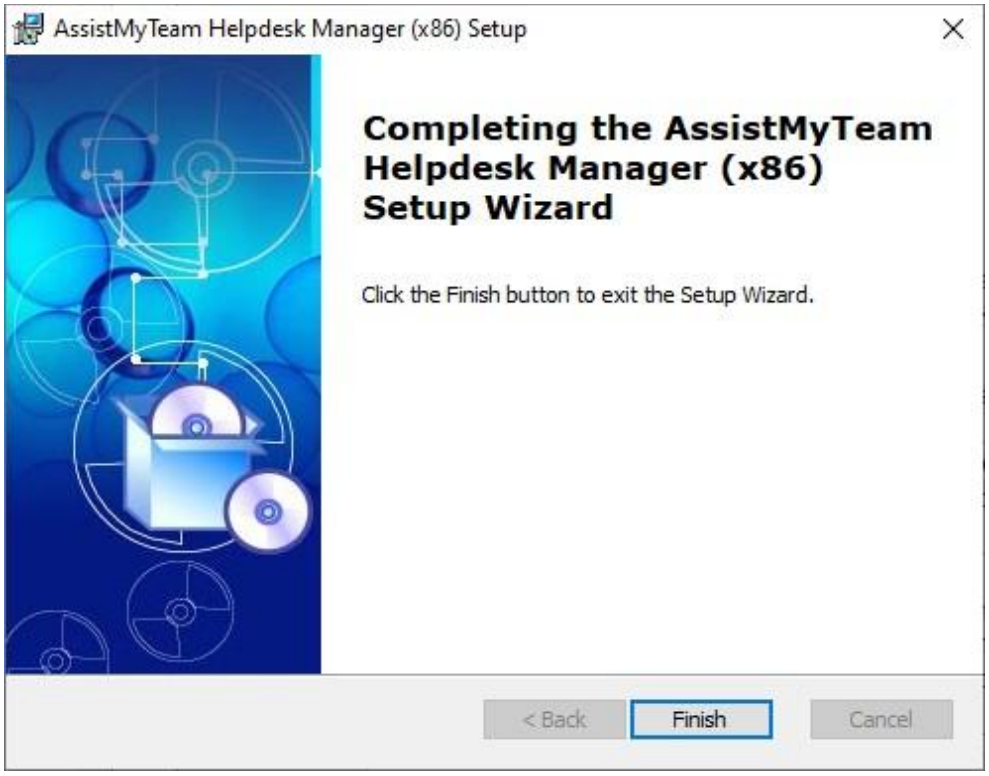


Step 3. Click 'Next' to continue with the file's extraction. It just takes a few minutes to complete the whole copying process.

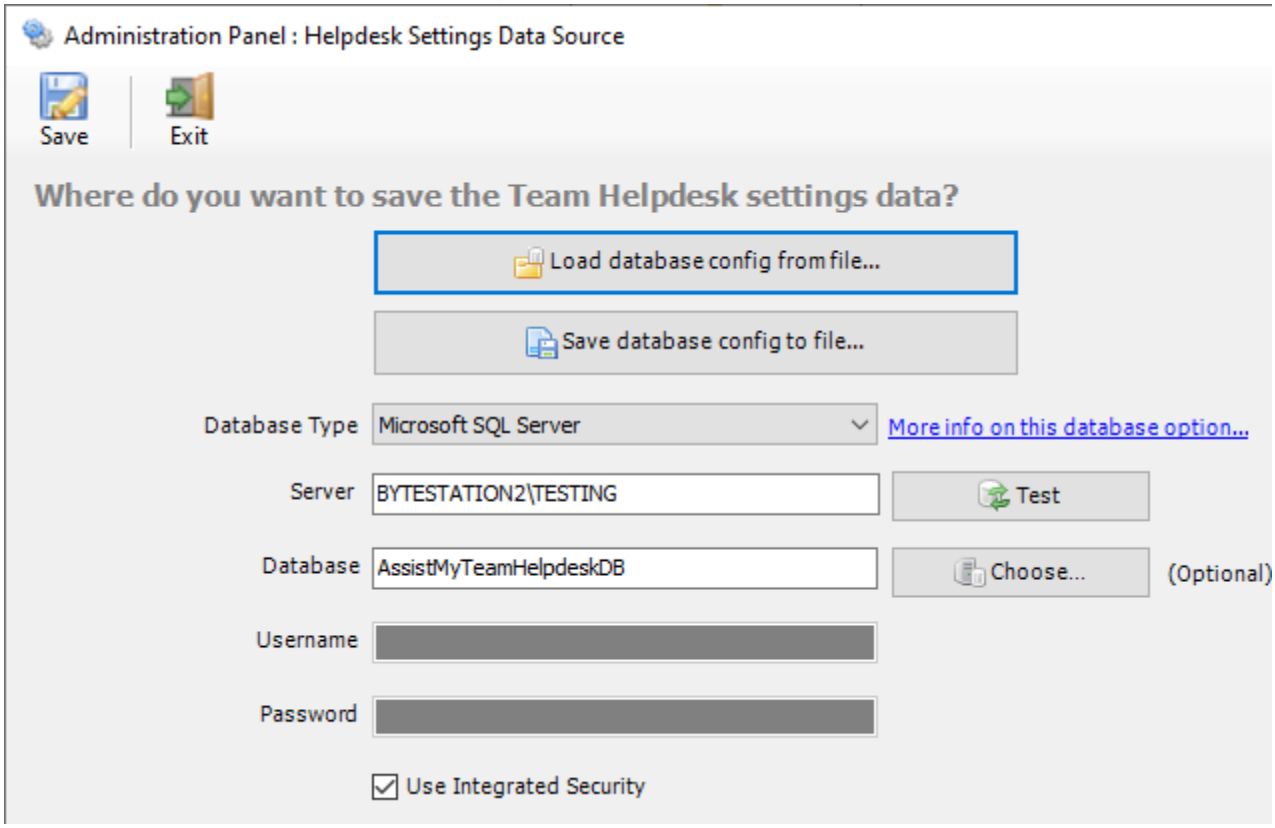


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Step 4. Click 'Finish'. This ends the files installation process in your system. Now start Microsoft Outlook.



Step 5. 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 database connection dialog box:



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Now, the final step is to choose a database where all the settings, templates, cases, articles and other helpdesk data will be saved. Supported database options are: **Microsoft SQL Server** (default) and **Microsoft Azure SQL**.

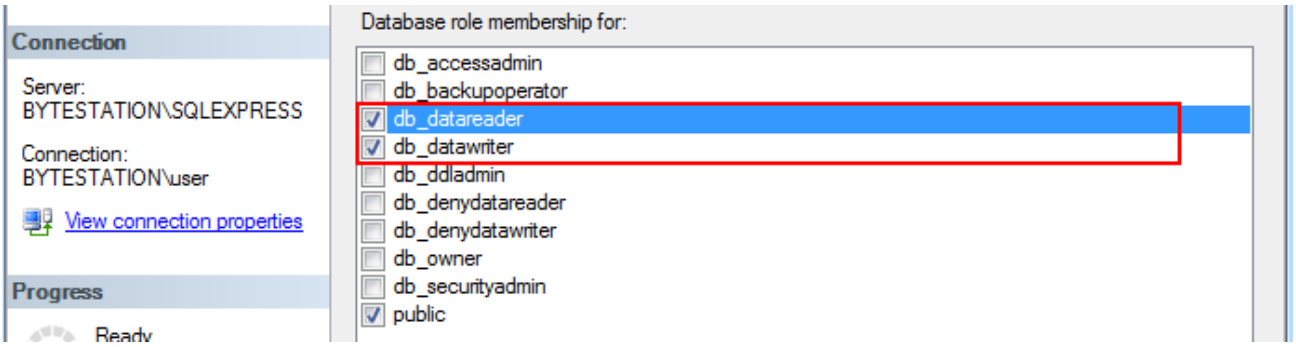
Using Microsoft SQL Server

This is the default recommended database. SQL Server Express edition is also supported.

You need to provide the Server name as it is mandatory. The Database name is optional. If it is left empty, a new database with the name 'AssistMyTeamHelpdeskDB' 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.

Permission for Technicians/Agents on the SQL database

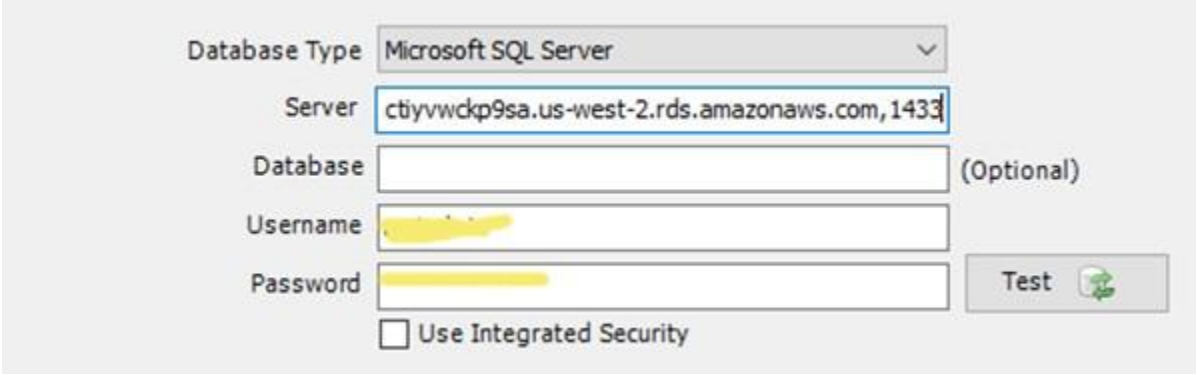
Each of your helpdesk users/technicians should have both **db_datareader** and **db_datawriter** permission on the Helpdesk SQL database.



NOTE: When choosing a SQL server database for Helpdesk System, if you are not using the 'Integrated Security' (also known as **Windows Authentication**, or **NTLM authentication**), then it is very important that each user or agent has knowledge about their SQL username and password so that they can enter them while making the first-time connection with the helpdesk database with their installed helpdesk add-in in Outlook.

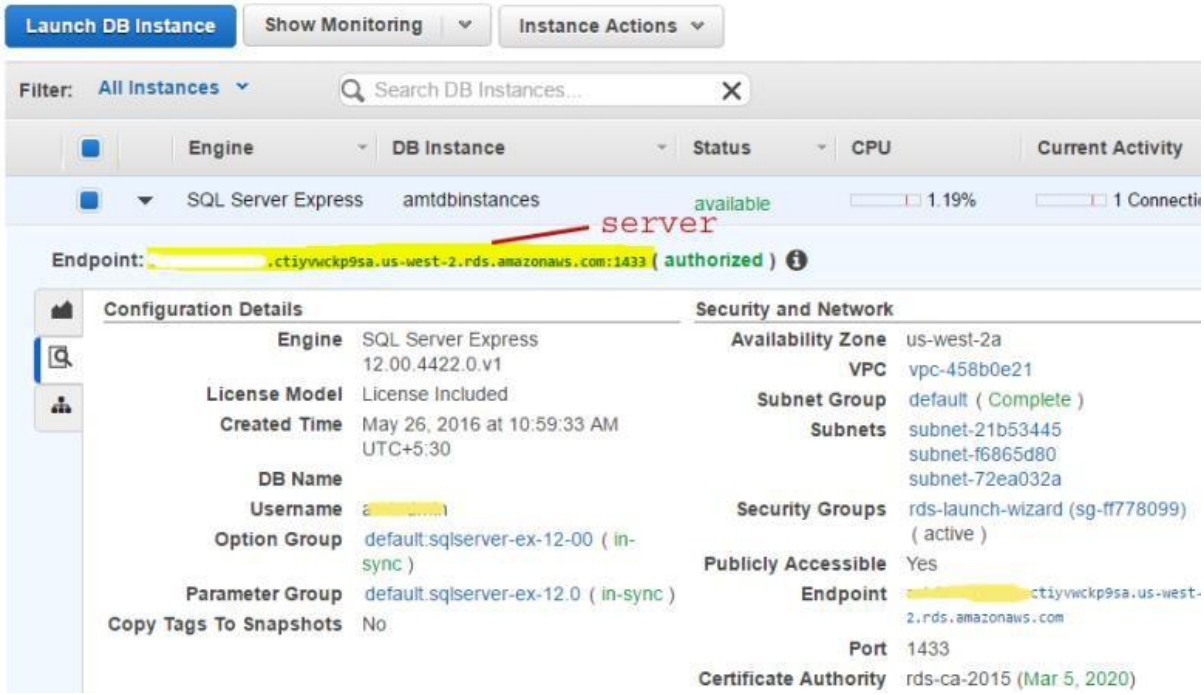
Using Cloud based SQL Server database

You can also use cloud-based SQL server service instead of on-premise such as Amazon RDS cloud service (They offer both free and paid accounts. For more, refer to https://aws.amazon.com/rds/). For instance, below is our test MS SQL account with Amazon RDS. Once you have signed up and created a MS SQL database, input the endpoint URL as server in our app. Make sure, you suffix the port number after the endpoint as ",1433" so that the full URL in the server's name would be 'XXXXXXXXXXXXXXXXXXXXXXXXX.rds.amazon.com,1433'.



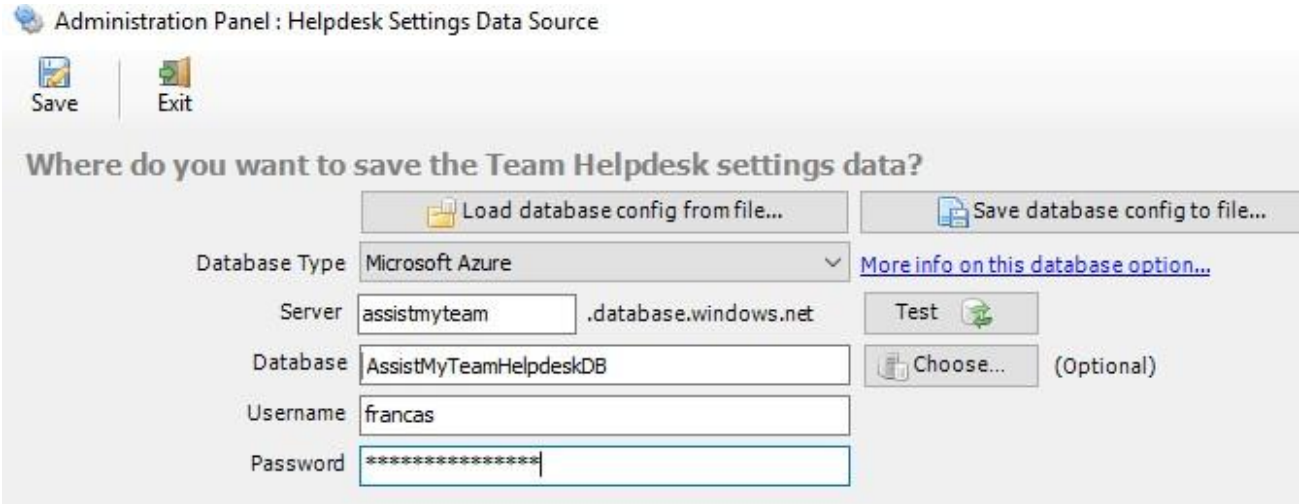
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And here is screenshot of the RDS server to use from the RDS member panel.



Using Microsoft Azure SQL

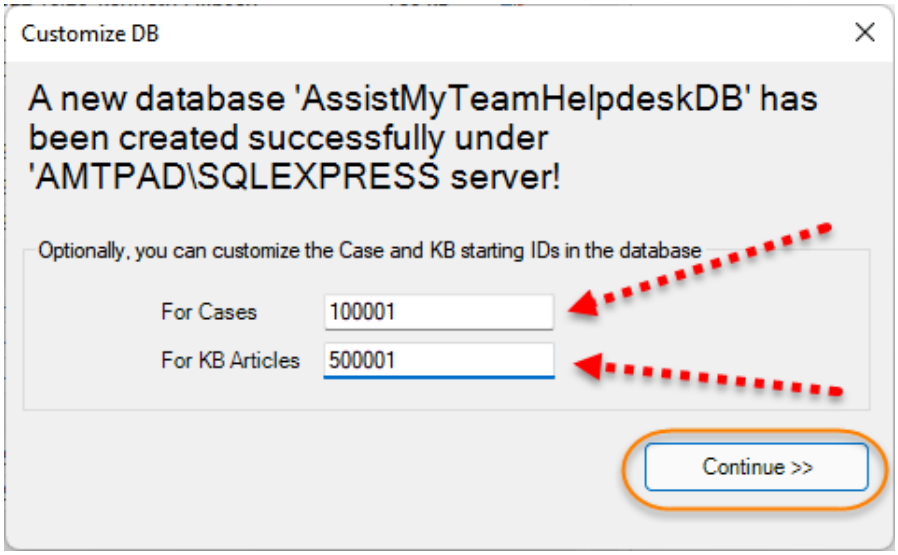
Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for helpdesk that have technicians scattered or working remotely in different locations but have access to the web.



NOTE: If no database name is mentioned, the helpdesk add-in will create a new database in your Azure SQL server, by the name of 'AssistMyTeamHelpdeskDB'.

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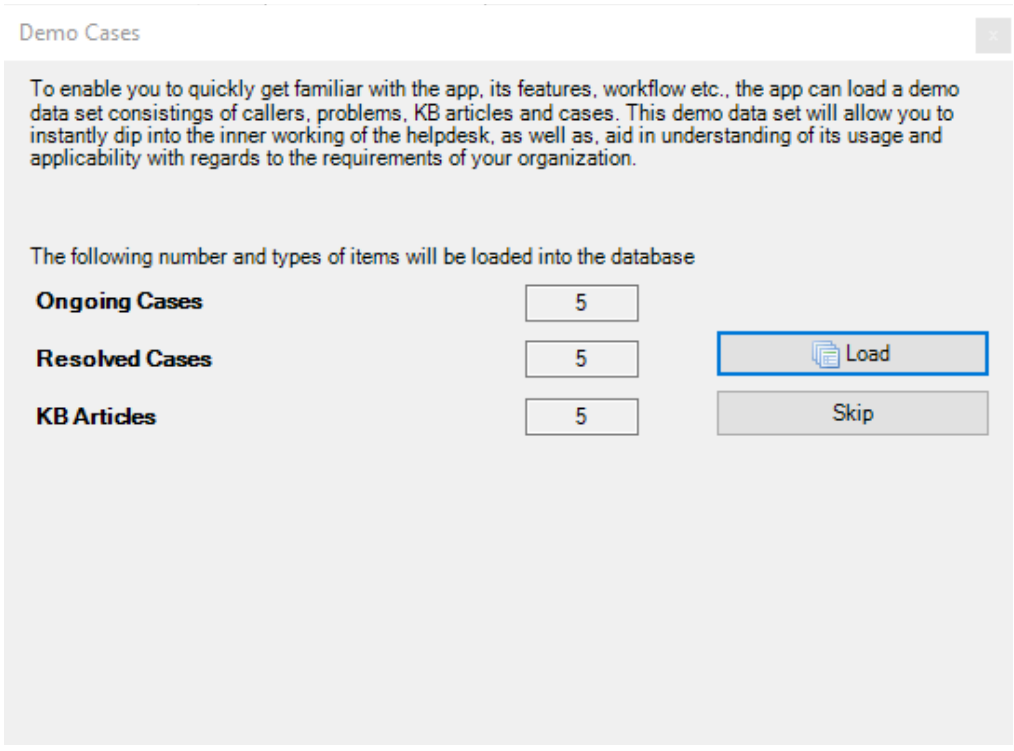
Step 6. Once the chosen database is created, you will be prompted with an option to customize the starting ID of the cases and KB articles. By default, the case and KB article will start from 1. However, you can change that to something higher, say 10001. You can type in your starting figure for cases and KB articles as shown below:



And press '**Continue >>**'.

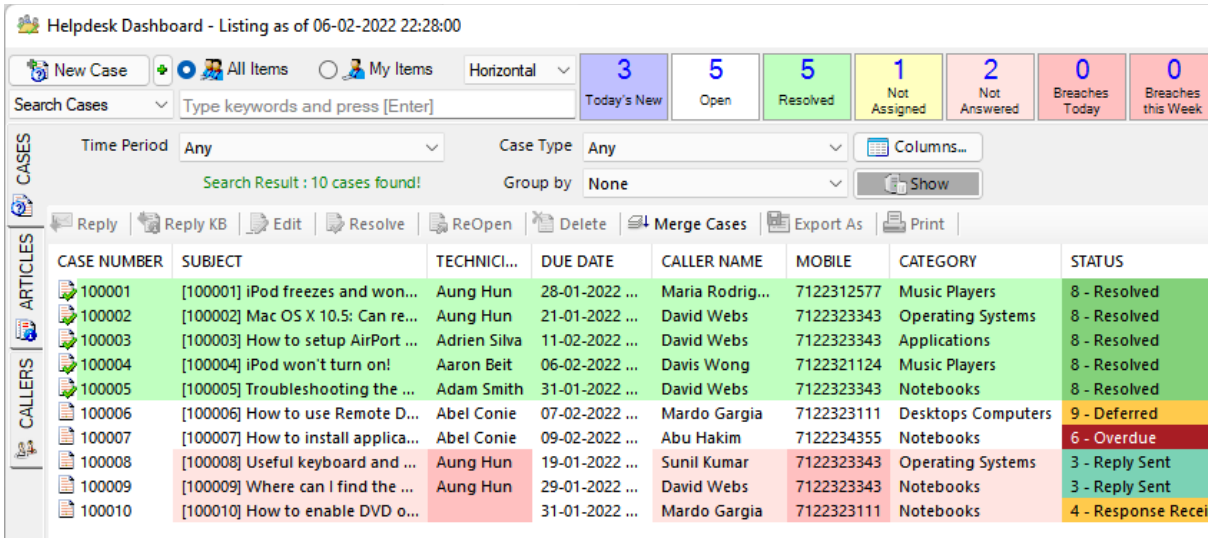
NOTE: In situation where you didn't customize the starting figures from the default 1, don't worry, you can customize it later on manually using the steps as described in this KB article - How to configure the case ID to start from 10000?

Step 7. With the database creation and configuration done, you will be given a choice to load a sample dataset of cases, KB articles and drop-down lists (problems, statuses, callers, agents etc.). We strongly feel you will be able to learn and get familiar with the helpdesk add-in very quickly with the sample dataset and hence, we recommend that you load them. If chosen, 5 each of cases, KB articles, callers, drop-down lists etc. will be loaded into your new database. You can, of course, remove them later without much difficulty.



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Once done, you are almost ready. If you want to work on the cases in your Outlook, you and other agents will also need to install the helpdesk agent add-in as well.



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