

Team Helpdesk for Outlook

Manager Installation and Configuration

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

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

Download link: [SETUPS](#)

There are two different setup types:

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

TeamHelpdeskSetups_x86.zip (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)

TeamHelpdeskSetups_x64.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

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

TeamHelpdeskSetups_x86_Citrix.zip (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)

TeamHelpdeskSetups_x64_Citrix.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

The downloaded zip file contains 3 files: **TeamHelpdeskManagerSetup_xXX.exe**, **TeamHelpdeskAgentSetup_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**, both the Manager and Agent 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 Team Helpdesk 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.*

The Admin setup is of two different types - one each for 32-bit Outlook and 64-bit Outlook

For Per User Installation:

TeamHelpdeskManagerSetup_x86.exe (for 32-bit Outlook 2007 SP3, 2010, 2013, 2016, 2019)

TeamHelpdeskManagerSetup_x64.exe (for 64-bit Outlook 2010, 2013, 2016, 2019)

For Per Machine Installation:

TeamHelpdeskManagerSetup_x86_Citrix.exe (for 32-bit Outlook 2007 SP3, 2010, 2013, 2016, 2019)

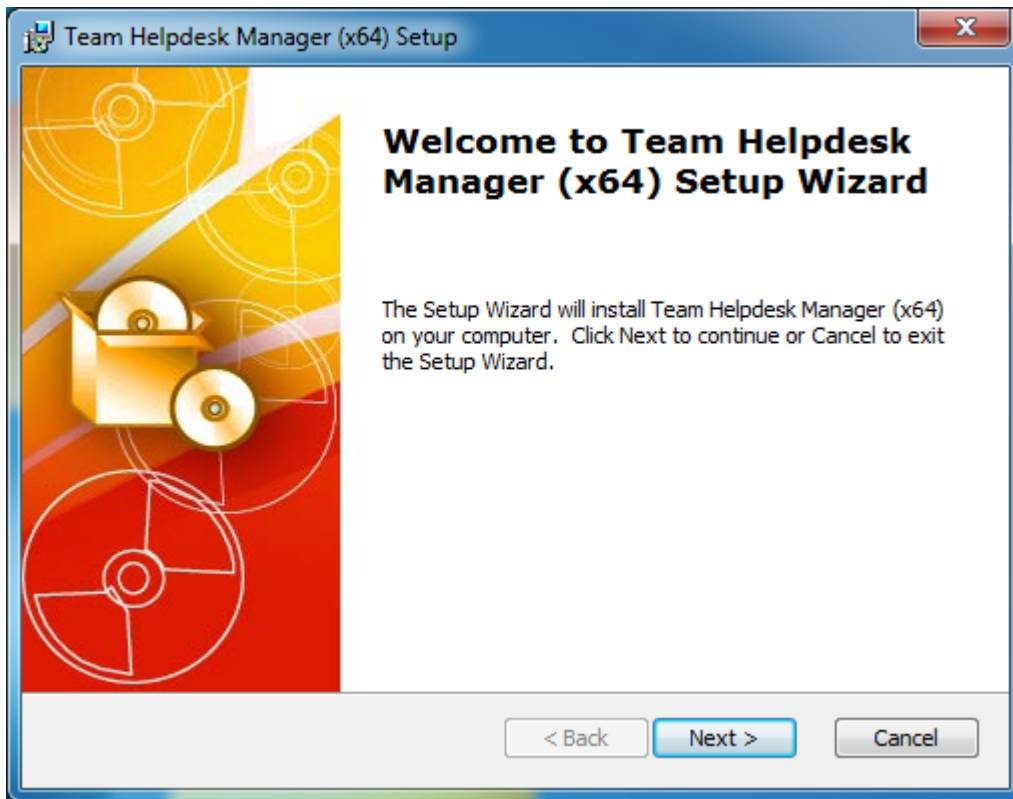
TeamHelpdeskManagerSetup_x64_Citrix.exe (for 64-bit Outlook 2010, 2013, 2016, 2019)

Managerial Installation

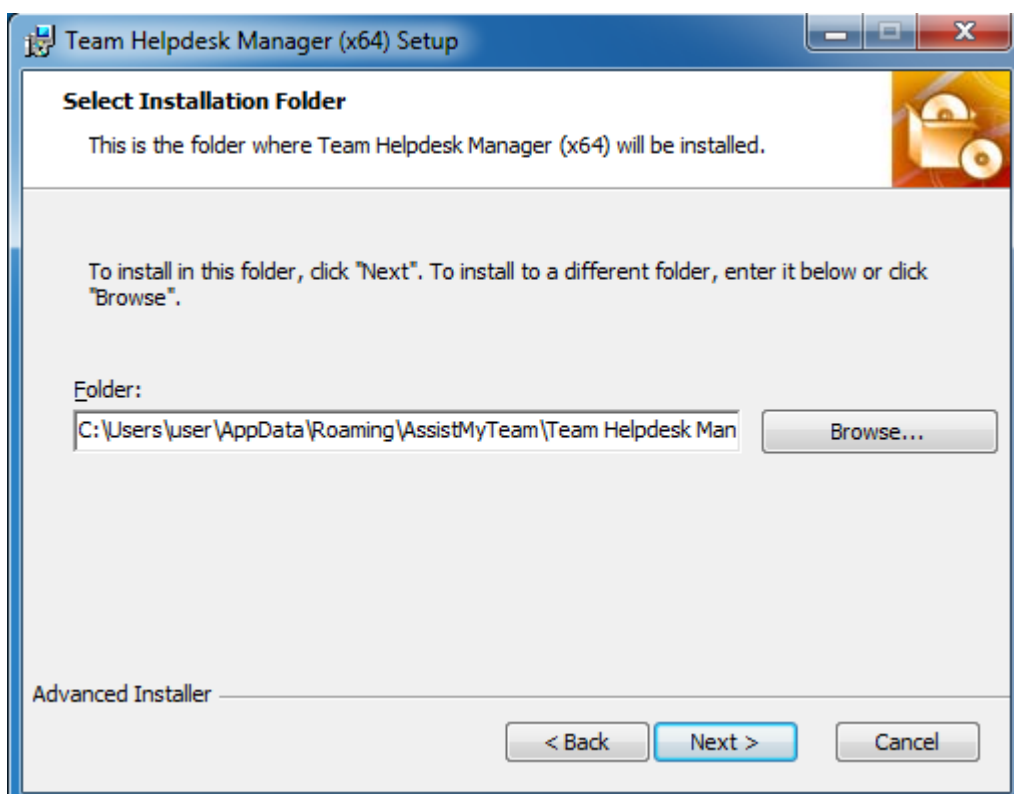
The managerial installation consists of server tools and files, for creating the Team Helpdesk Outlook folders, and for configuring and maintaining the settings of the helpdesk. It has to be performed by the helpdesk administrator/manager before the client tool is installed on every technician's system.

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Step 1. Run the **TeamHelpdeskManagerSetup_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.

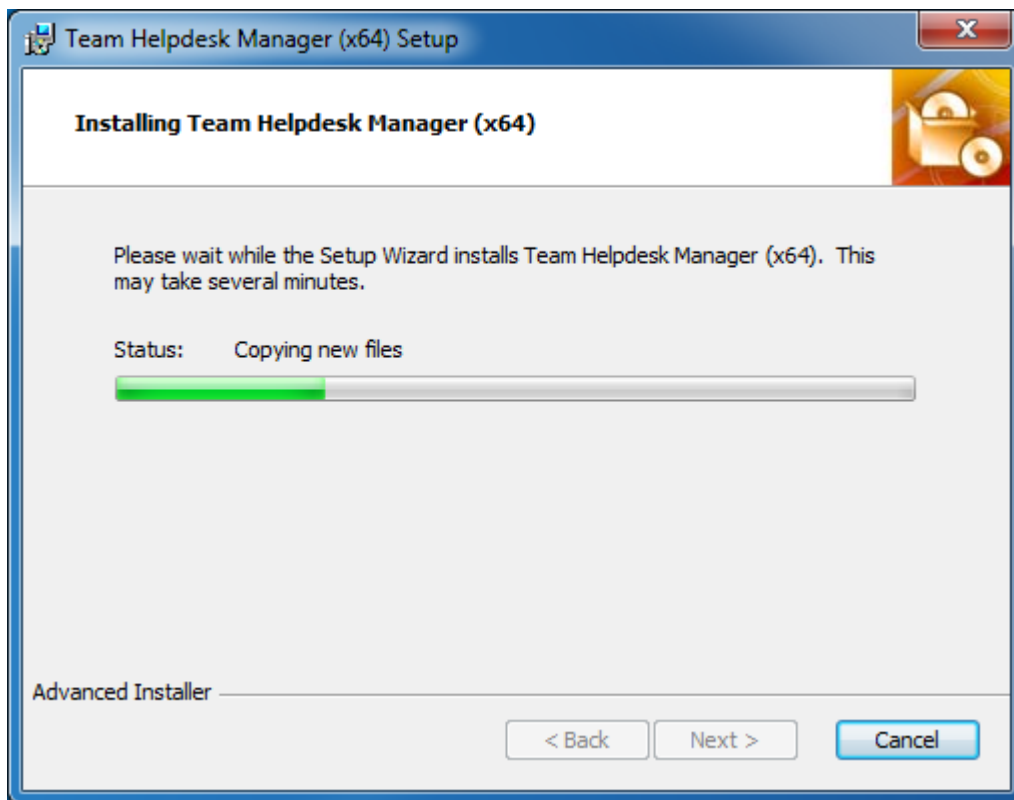


Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (**Note:** by default, it will be installed under your application data folder)



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

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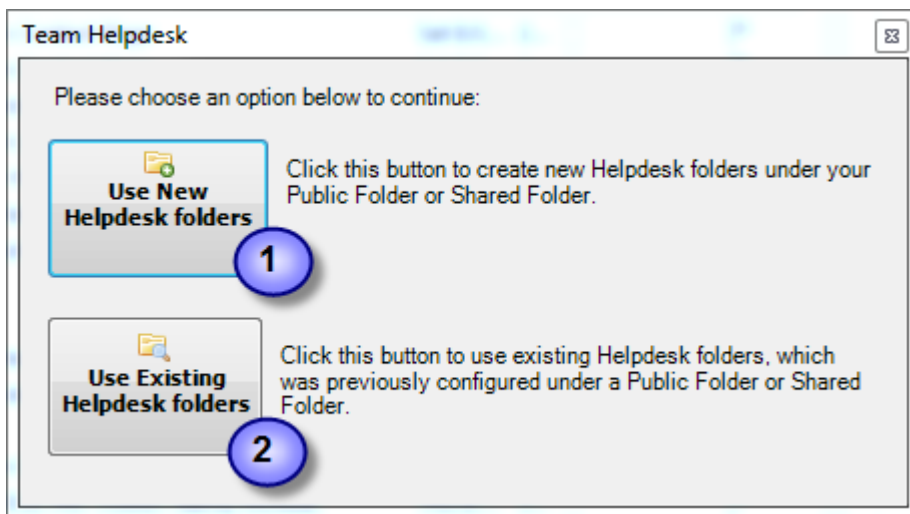


Step 4. Click '**Finish**'. This ends the files installation process in your system. Now start Microsoft Outlook

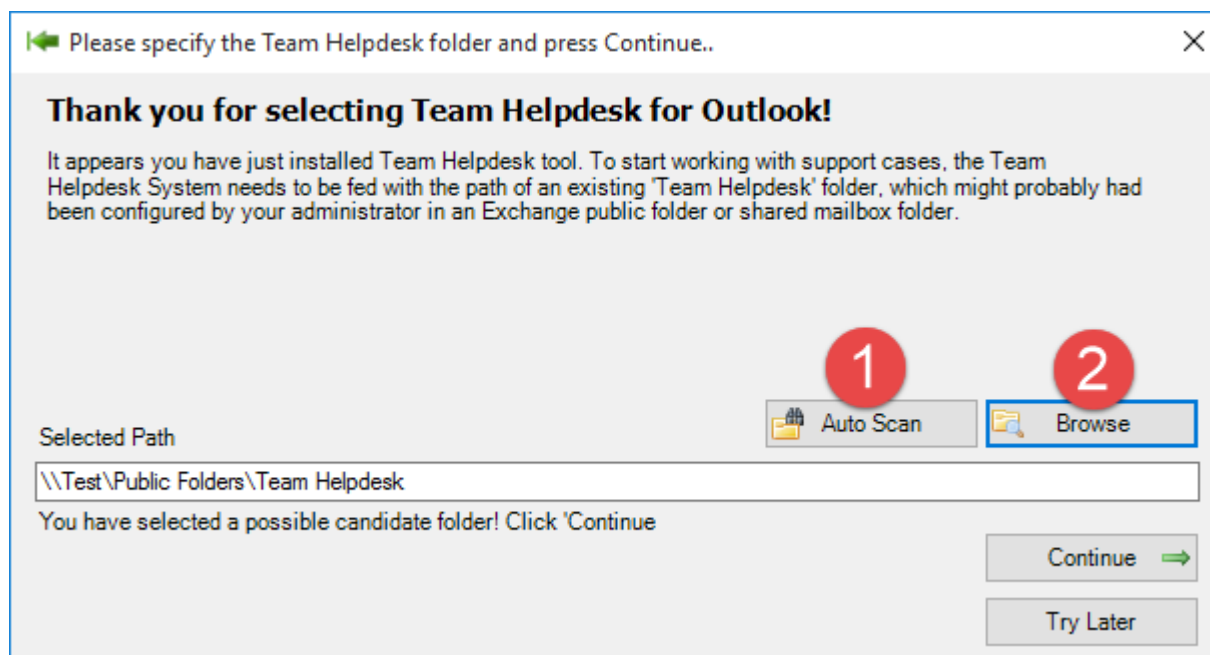


Step 5. Start Outlook (restart if it was already running during the files installation). As soon as Outlook is loaded, you will be prompted with the following dialog box, offering you two choices:

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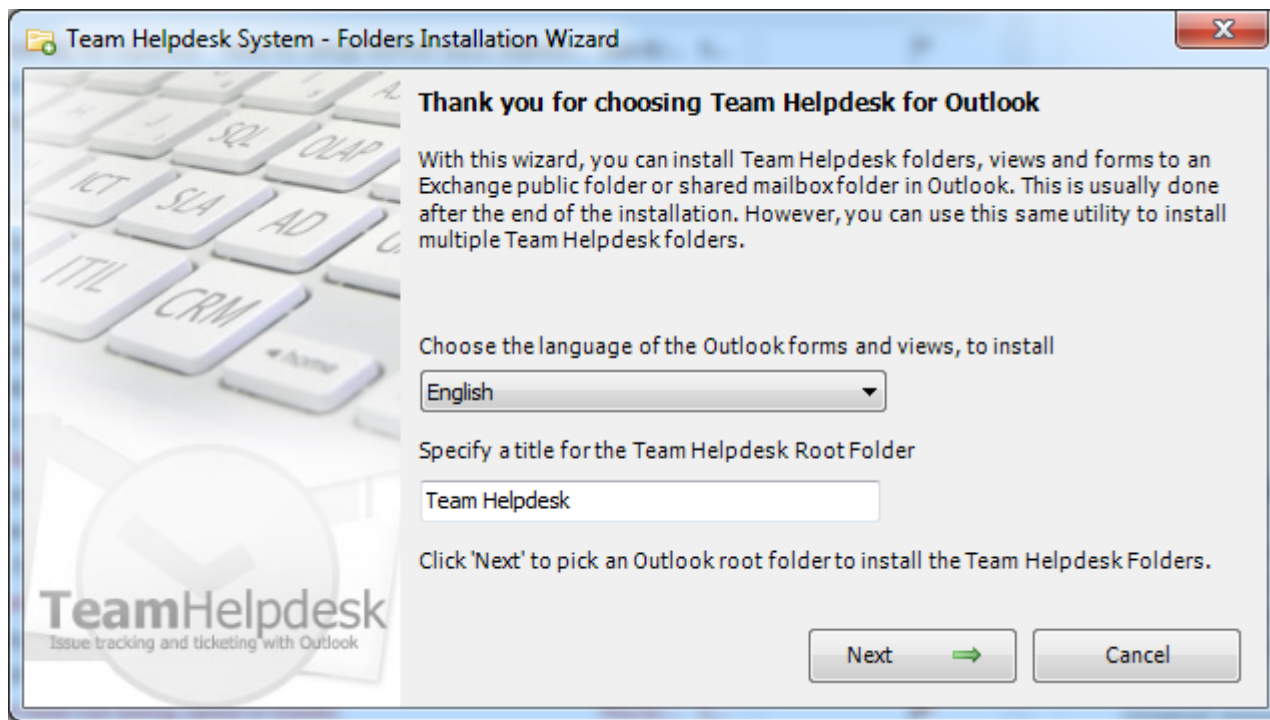


- 1 Create New Team Helpdesk folders** – Click this button to create new Team Helpdesk folders (i.e., Ongoing Cases, Resolved Cases, KB, Schedules, History and Settings) which are customized with Team Helpdesk specific fields, views and forms. Follow step 6 to further go ahead with the configuration.
- 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. You will be given the option to select the existing Team Helpdesk root folder, 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 Team Helpdesk folder. If you already know the location of the existing Team Helpdesk folders, you can simply click the '**Browse**' **2** button to specify it from your Outlook and then click '**Continue**'. Steps 6 and 7 would be not applicable, with this route.

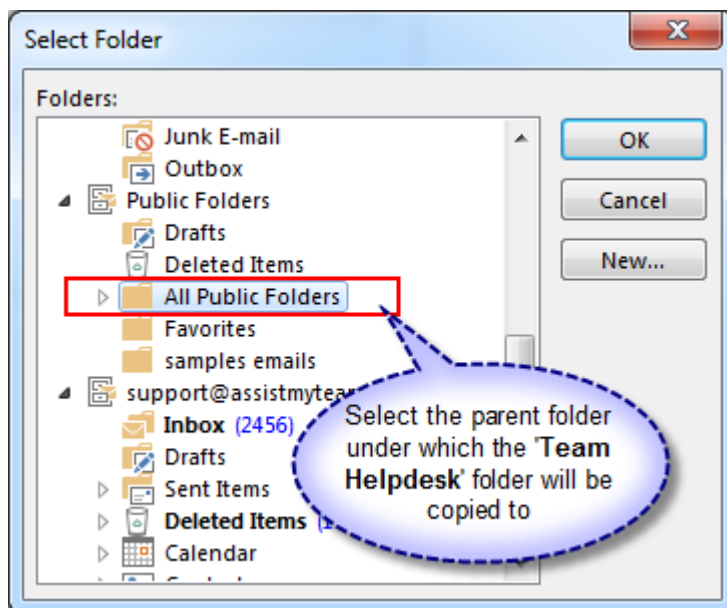
Step 6. A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent Team Helpdesk folder that will be created. By default, it has a title of '**Team Helpdesk**'.



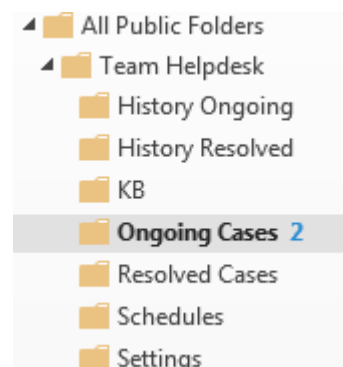
Further, you can choose the language specific Outlook forms and Views to install. The following languages are supported:

English, Español, Norwegian, Danish, Dutch, Deutsch, French, Finnish, Swedish, Portuguese.

Step 7. Clicking '**Next**' button would enable you to select an Outlook parent folder where the specified Team Helpdesk root folder would be created. Hence make sure you have adequate rights over the selected folder to create a new folder.



The tool would then copy Team Helpdesk subfolders, forms & designs, views etc. from the Team Helpdesk PST template file. It would look like the following 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, go to **Outlook > Team Helpdesk Manager** menu and click '**Copy a New Team Helpdesk folder**'. That will manually invoke the wizard tool for copying a new Team Helpdesk folder to your Outlook

Step 8. Now, the final step is to choose a Team Helpdesk database where all the settings, templates and other helpdesk data will be saved. Supported database options are:

- i) **Microsoft Exchange/Outlook**
- ii) **Microsoft Access**
- iii) **Microsoft SQL Server**
- iv) **Microsoft Azure SQL**
- v) **Microsoft SharePoint**

i) Microsoft Exchange/Outlook

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 best used for quickly evaluating Team Helpdesk in your environment without needing to configure a dedicated database. However, please be careful to not use this database option for your live production helpdesk, as it is unsuitable for multi-users helpdesk environment.

Administration Panel : Helpdesk Settings Data Source

Save Exit

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

Load database config from file... Save database config to file...

Database Type: Microsoft Exchange\Outlook [More info on this database option...](#)

Exchange Folder Path: \\Public Folders\All Public Folders\Team Helpdesk\Settings

WARNING: This database option is provided to enable for quick evaluation. It should not be used for your live production helpdesk, as it is unsuitable for multi-users helpdesk environment.

Team Helpdesk will use the Team Helpdesk Settings subfolder (Microsoft Exchange) to store all the helpdesk settings, drop down lists, templates and other data. This option does not use an external network database to store the helpdesk settings data, and hence, is ideal for distributed technicians who can't connect to the company's network.

NOTE: You need to make sure all technicians have at least editor permission over the Team Helpdesk 'Settings' subfolder.

[Guide to switching database option](#)

ii) Microsoft Access

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 (e.g. \\AMTServer\Helpdesk\) instead of a mapped one because, a mapped drive might only be accessible to you.

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Administration Panel : Helpdesk Settings Data Source

Save Exit

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

Load database config from file... Save database config to file...

Database Type: Microsoft Access [More info on this database option...](#)

Save in: \\AMTServer\Helpdesk\

Team Helpdesk will use a Microsoft Access database to store all the helpdesk settings, drop down lists, templates and other data. So make sure you specify a shared network folder where the Access database file (TeamHelpdeskSettings.mdb) will be saved. It is also important that all technicians have write permission over this shared folder.

NOTE: It is advisable that you avoid using a mapped drive (eg., X:) to store the access database. Instead use a UNC folder path (eg. \\Server\Folder) so that it is accessible to all technicians who will be working on support cases in Outlook.

[Guide to switching database option](#)

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.

NOTE: 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.

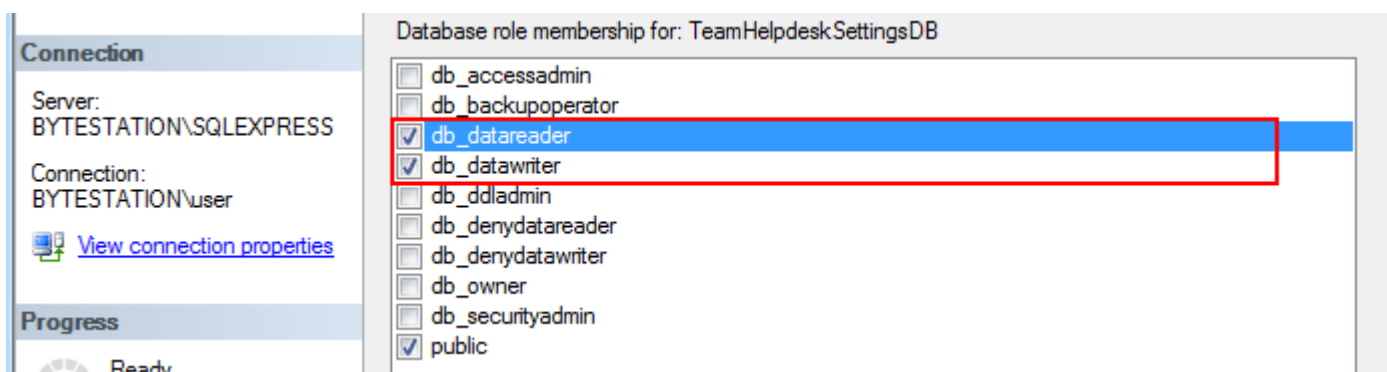
iii) Microsoft SQL Server

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

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 Agent, 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.

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 Team Helpdesk SQL database.



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 Agents from different systems of the technicians.

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 name would be ‘XXXXXXXXXXXXXXXXXXXXXXXXXXXX.rds.amazonaws.com,1433’.

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

Configuration Details		Security and Network	
Engine	SQL Server Express 12.00.4422.0.v1	Availability Zone	us-west-2a
License Model	License Included	VPC	vpc-458b0e21
Created Time	May 26, 2016 at 10:59:33 AM UTC+5:30	Subnet Group	default (Complete)
DB Name		Subnets	subnet-21b53445 subnet-f6865d80 subnet-72ea032a
Username	a[redacted]	Security Groups	rds-launch-wizard (sg-ff778099) (active)
Option Group	default:sqlserver-ex-12-00 (in-sync)	Publicly Accessible	Yes
Parameter Group	default:sqlserver-ex-12.0 (in-sync)	Endpoint	.ctiyvwkcp9sa.us-west-2.rds.amazonaws.com
Copy Tags To Snapshots	No	Port	1433
		Certificate Authority	rds-ca-2015 (Mar 5, 2020)

iv) 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.

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Administration Panel : Helpdesk Settings Data Source

Save Exit

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

Load database config from file... Save database config to file...

Database Type: Microsoft Azure [More info on this database option...](#)

Server: assistmyteam .database.windows.net Test

Database: TeamHelpdeskSettingsDB Choose... (Optional)

Username: francas

Password: *****

Team Helpdesk will use a Microsoft Azure SQL database to store all the helpdesk settings, drop down lists, templates and other data.

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

NOTE: Team Helpdesk will create a new database in your Azure SQL server. The default database name 'TeamHelpdeskSettingsDB' will be used if you don't enter any existing database name.

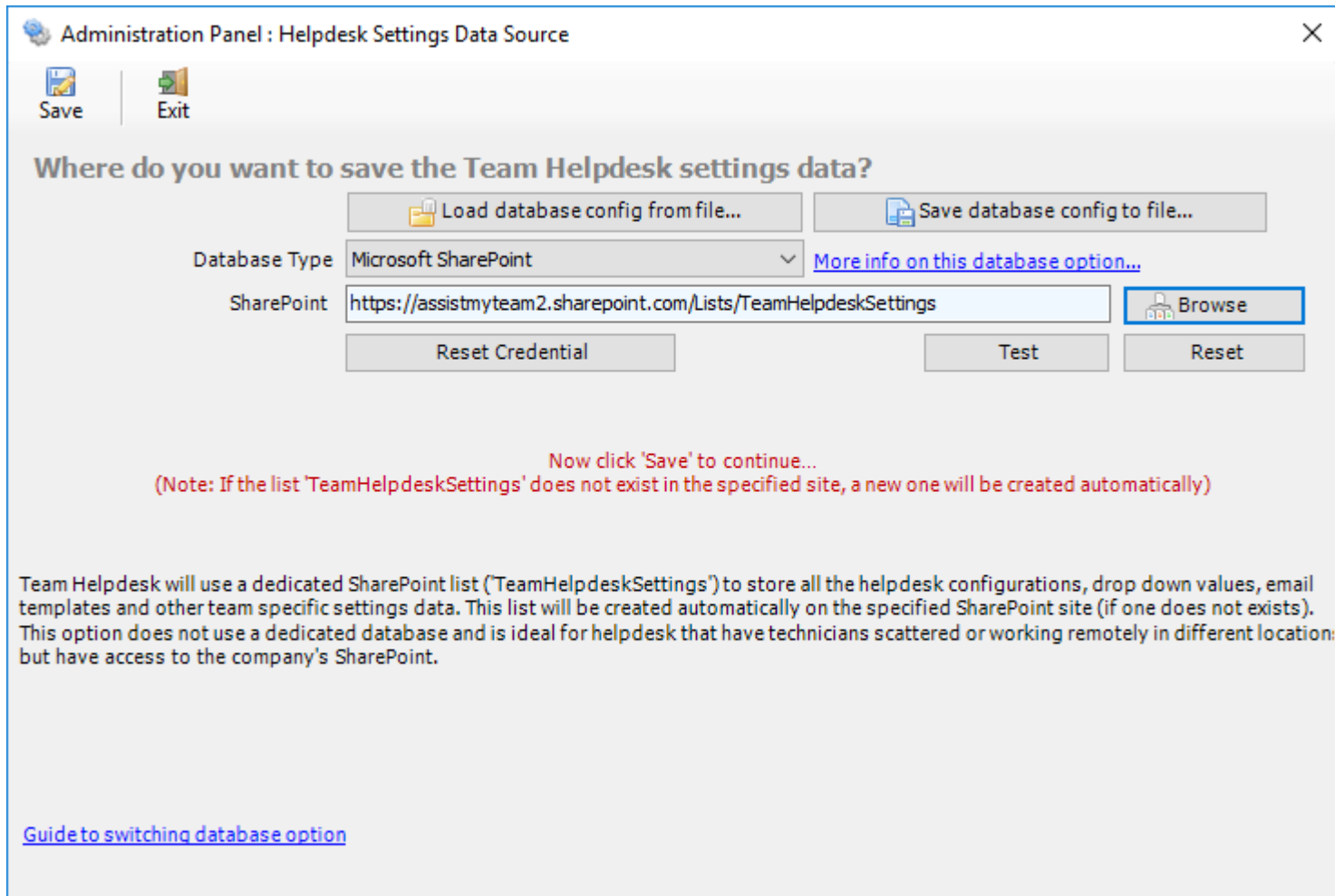
[Guide to switching database option](#)

NOTE: If no database name is mentioned, Team Helpdesk will create a new database in your Azure SQL server, by the name of 'TeamHelpdeskSettingsDB'.

v) Microsoft SharePoint

The last helpdesk database option 'Microsoft SharePoint' allows you to use your SharePoint site to store the helpdesk settings, drop down lists, email templates and other global configurations such that all your technicians can access it from the internet or WAN. This is ideal if many of your technicians' work from remote location with no access to the office network but can access to the company's SharePoint site from outside the office network.

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Administration Panel: Helpdesk Settings Data Source

Save Exit

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

Load database config from file... Save database config to file...

Database Type: Microsoft SharePoint [More info on this database option...](#)

SharePoint: Browse

Reset Credential Test Reset

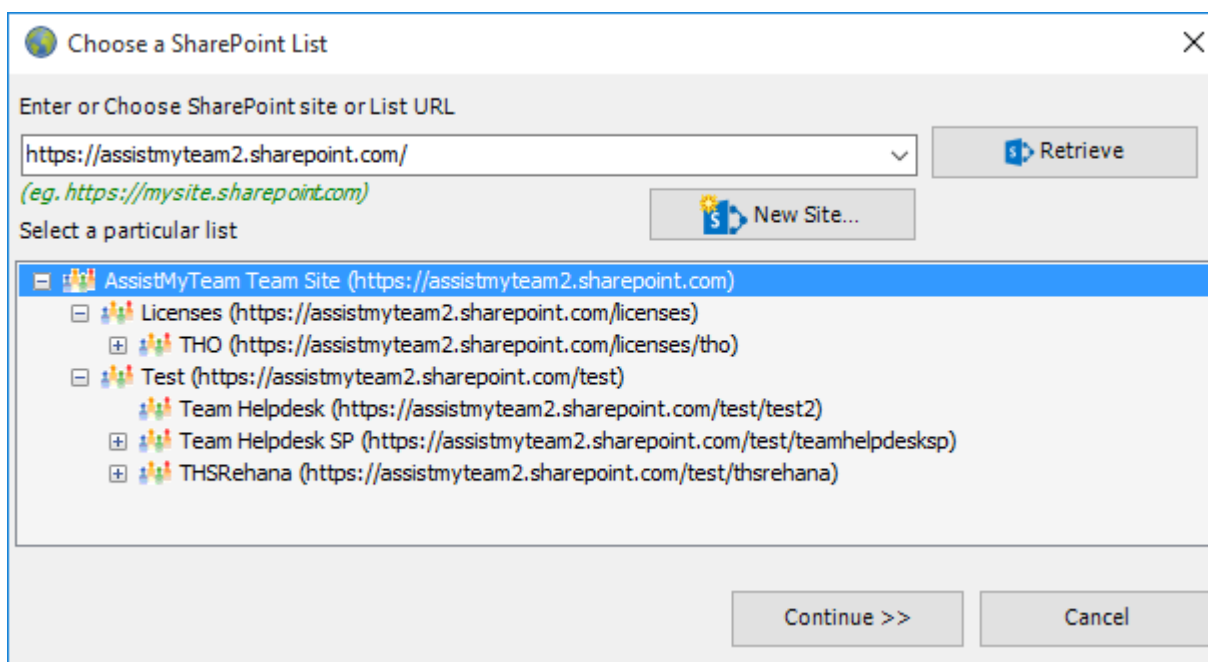
Now click 'Save' to continue...
(Note: If the list 'TeamHelpdeskSettings' does not exist in the specified site, a new one will be created automatically)

Team Helpdesk will use a dedicated SharePoint list ('TeamHelpdeskSettings') to store all the helpdesk configurations, drop down values, email templates and other team specific settings data. This list will be created automatically on the specified SharePoint site (if one does not exists). This option does not use a dedicated database and is ideal for helpdesk that have technicians scattered or working remotely in different location but have access to the company's SharePoint.

[Guide to switching database option](#)

To specify a SharePoint site, click the '**Browse...**' button. This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format *http://mySharePointsite*. And click 'Retrieve' to show all available sub-sites and lists.

Very Important! Your permission to the SharePoint site: Make sure that you have '**Full Control**' permission over the SharePoint site so that Team Helpdesk Manager add-in can create the '*TeamHelpdeskSettings*' list automatically.



Choose a SharePoint List

Enter or Choose SharePoint site or List URL

Retrieve

(eg. *https://mysite.sharepoint.com*)

Select a particular list

- AssistMyTeam Team Site (*https://assistmyteam2.sharepoint.com*)
 - Licenses (*https://assistmyteam2.sharepoint.com/licenses*)
 - THO (*https://assistmyteam2.sharepoint.com/licenses/tho*)
 - Test (*https://assistmyteam2.sharepoint.com/test*)
 - Team Helpdesk (*https://assistmyteam2.sharepoint.com/test/test2*)
 - Team Helpdesk SP (*https://assistmyteam2.sharepoint.com/test/teamhelpdesksp*)
 - THSRehana (*https://assistmyteam2.sharepoint.com/test/th srehana*)

Continue >> Cancel

And then select the particular site under which the Helpdesk settings would be stored. You can also choose to create a new sub-site on the fly by clicking the 'New Site...' button and select it. When you click 'Confirm', Team Helpdesk will automatically create and configure a new SharePoint list titled '*TeamHelpdeskSettings*' under the site. And then any settings/drop down lists you defined from Team Helpdesk Manager Tool in Outlook would be saved in this repository.

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If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint.

However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you (and another individual technician) to enter their credential.

You can also specify the authentication mode that is used by your SharePoint to allow connection to it.

For instance, if your SharePoint is configured for Windows authentication, choose 'NTLM'. If it used a form-based authentication, then choose 'Forms' whereas if it used a claimed based authentication (for Office 365 SharePoint Online), choose 'Office 365'.

In the username, exclude any domain information. For instance, do not enter in the format **DOMAIN\UserName**. Only enter **UserName**. If your SharePoint site login requires a domain name, enter one in the 'Domain' box instead. Check 'Remember' so that Team Helpdesk add-in can use the same credential to logon to the SharePoint site in subsequent connection.

When your technicians with the Team Helpdesk Agent tool starts Outlook, the add-in would automatically connect to the admin specified SharePoint site and would retrieve the helpdesk logic and settings data to the local system.

What SharePoint permissions are required for other technicians?

All technicians should have at least '**Contribute**' permission the SharePoint list '*TeamHelpdeskSettings*'.

You can use any SharePoint version starting with SharePoint 2010 to the latest SharePoint 2016. You can also use Office 365 SharePoint Online too.

Step 9. Once you click '**Save**', the manager tool will automatically create the chosen database (if it does not exist already). And then any project metadata and other settings/drop down lists you defined from Team Helpdesk Manager add-in in Outlook would be saved in this repository.

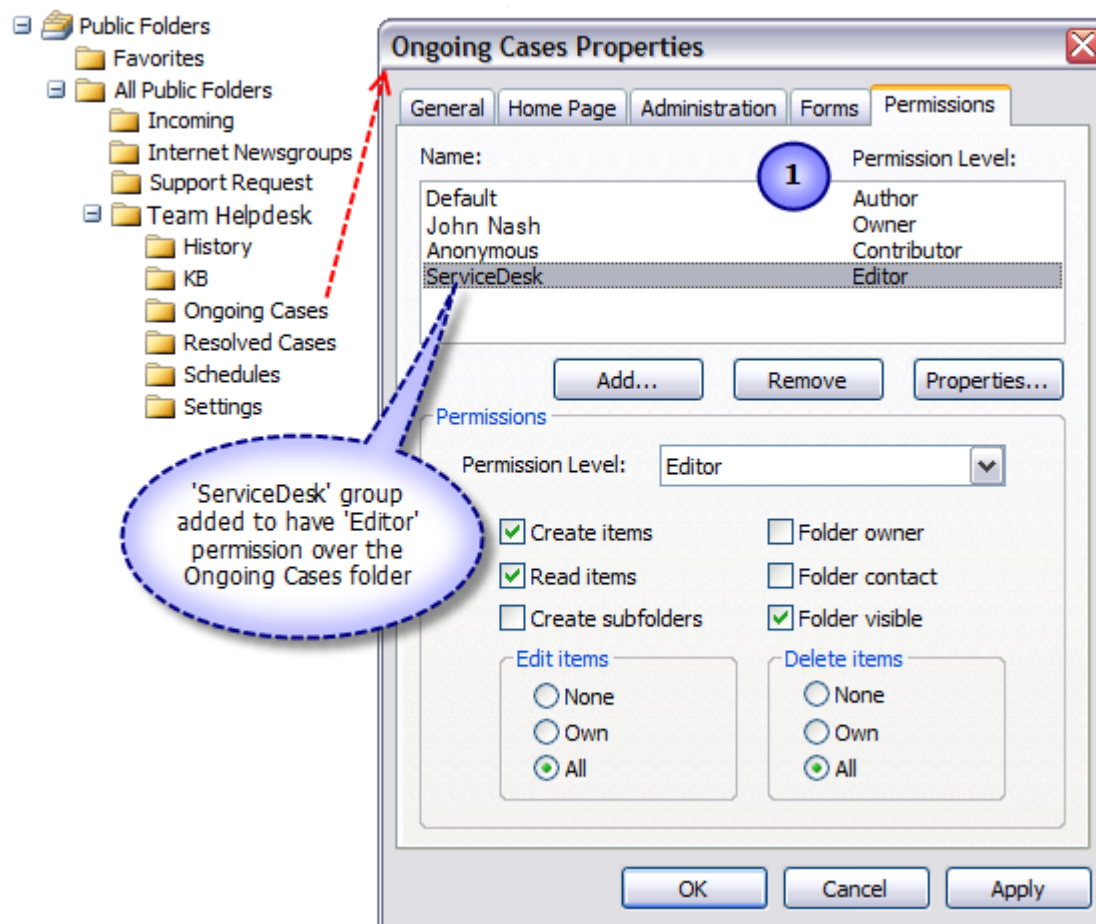
Now that you have installed - Team Helpdesk files into your system and Team Helpdesk folders into your public folder or mailbox, administrator would need to configure the permission level of each Team Helpdesk folder, namely, the History Ongoing, History Resolved, KB, Ongoing Cases, Resolved Cases, Schedules 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.

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

We recommend that a user's group consisting of all agents/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.



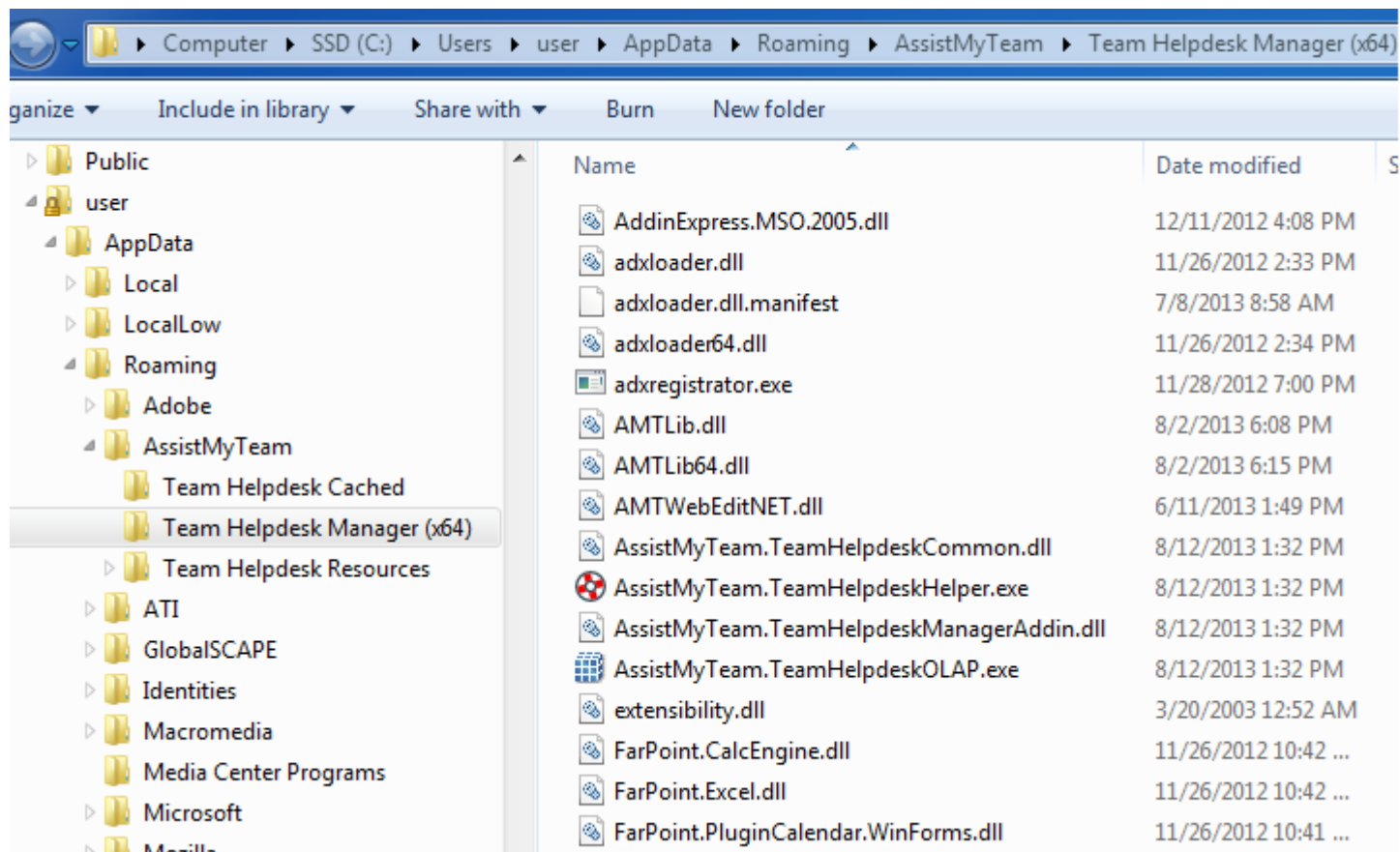
The screenshot below lists all the files that are installed on the system. Notice, that, there are additional files which forms the managerial option pack - tools to configure and install a new Team Helpdesk folder, which has to be performed only by the helpdesk administrator/manager.

Add-in files under current user's application data folder:

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E.g. *C:\Users\[USER]\AppData\Roaming\AssistMyTeam\Team Helpdesk Manager (x64 or x86)* if it is 'Per User Installation'.

For 'Per Machine Installation', it would be *C:\Program files (x86)\AssistMyTeam\Team Helpdesk Manager (x86 or x64)*



Template PSTs/Forms/Web Access files under current user's application data folder:

E.g. *C:\Users\[USER]\AppData\Roaming\AssistMyTeam\Team Helpdesk Resources*

