

Team Helpdesk for Outlook & SharePoint

Agent Installation and Configuration

(for version 6 and above)

Page | 1

This install is meant for agents and technicians who would be working on support cases in the configured Outlook folders. Before you install the agent 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 e.g. \\All Public Folders\Public folders\Team Helpdesk SP\Settings). This is required because you will be asked to specify the configured Team Helpdesk 'Settings' subfolder once you start Outlook (for the purpose of linking up the agent tool with the Team Helpdesk outlook folders and is required one time only).

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

In 'Per User Installation', the Team Helpdesk Agent 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.

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

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

TeamHelpdeskSPAgentSetup_x86.exe (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)

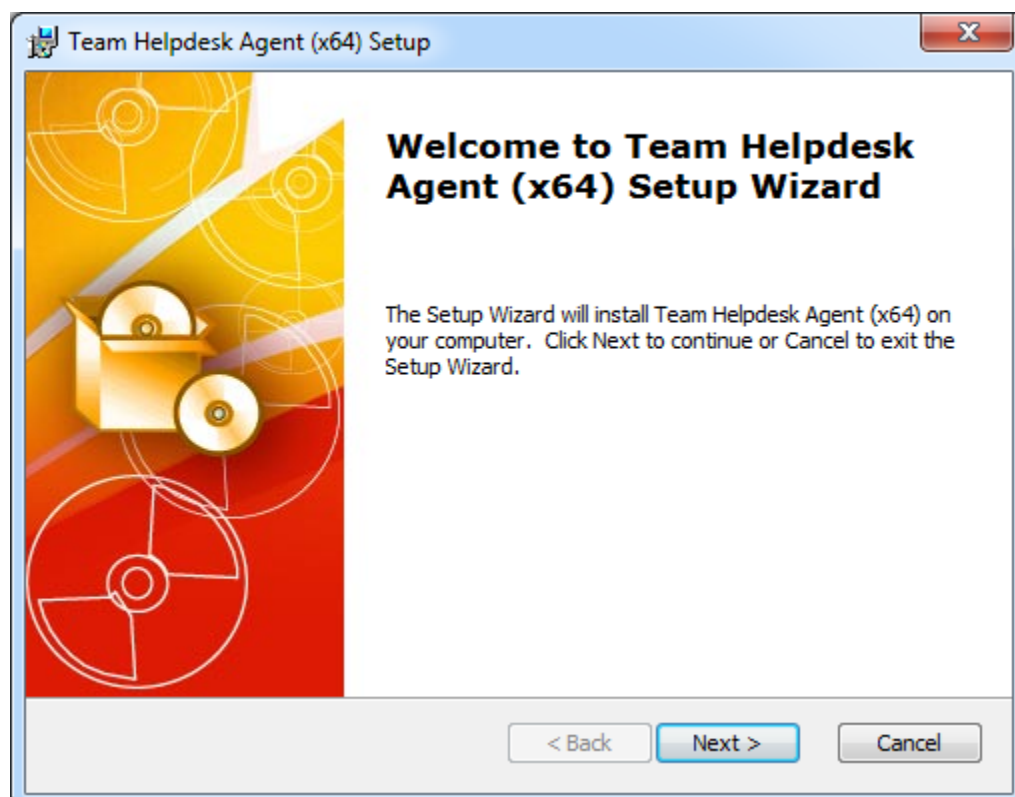
TeamHelpdeskSPAgentSetup_x64.exe (for 64-bit Outlook 2010, 2013, 2016, 2019)

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

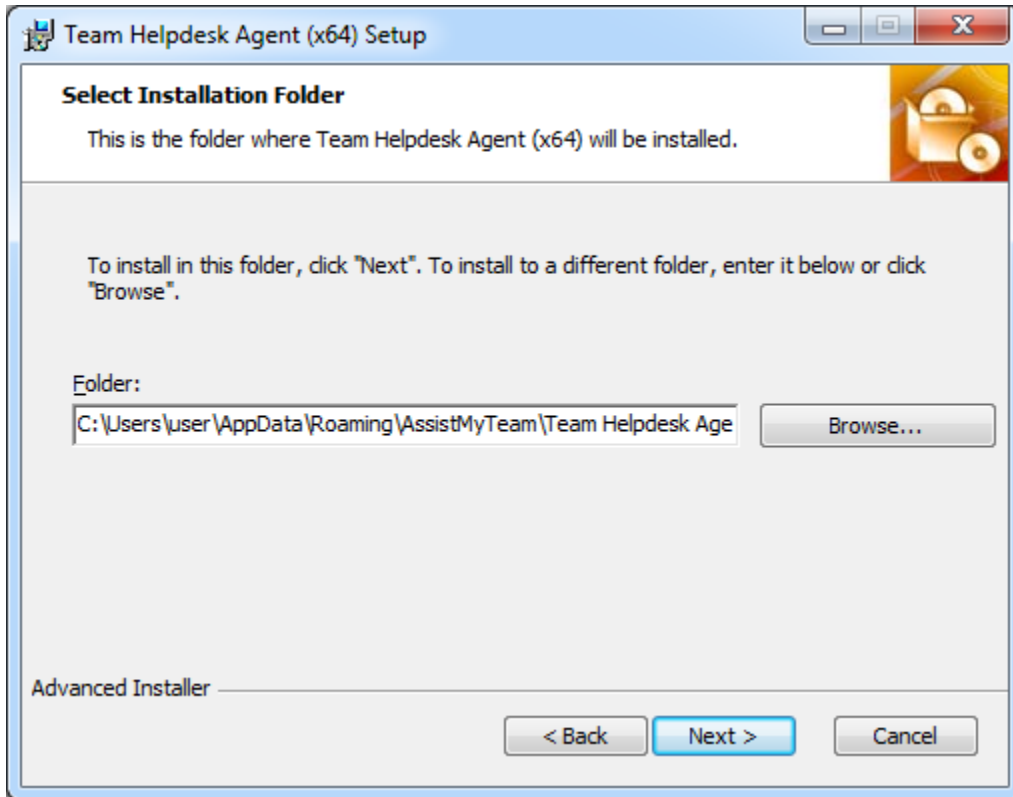
TeamHelpdeskSPAgentSetup_x86_Citrix.exe (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)

TeamHelpdeskSPAgentSetup_x64_Citrix.exe (for 64-bit Outlook 2010, 2013, 2016, 2019)

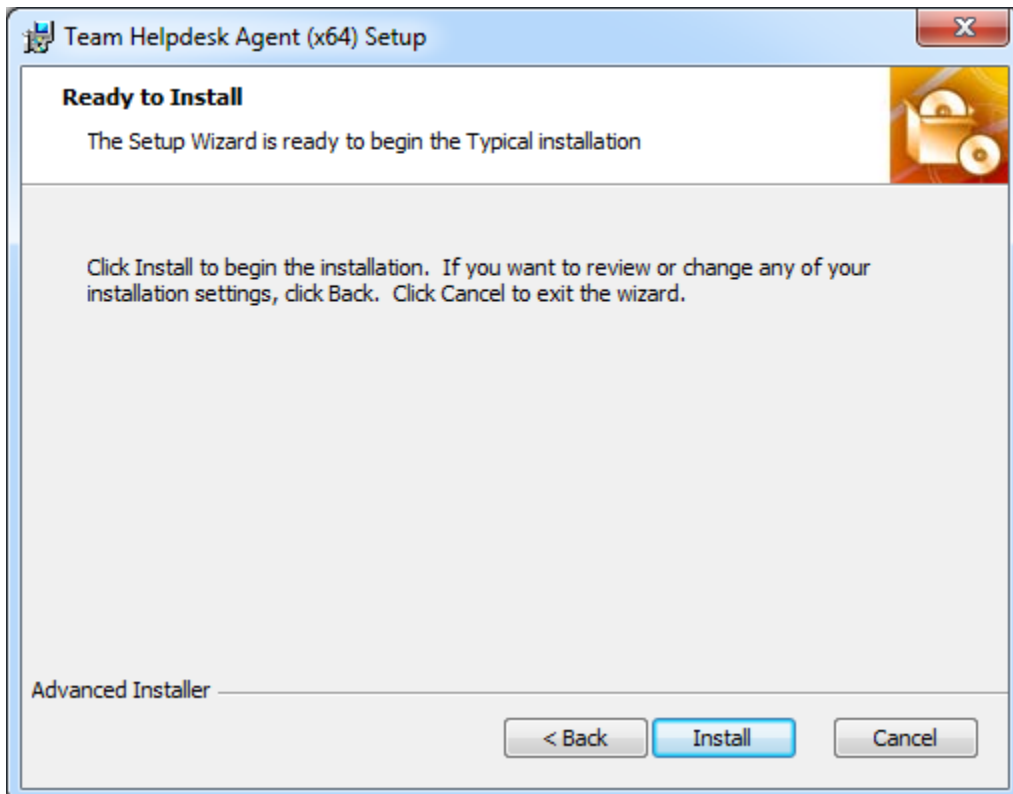
Step 1. Run *TeamHelpdeskSPAgentSetup_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2007 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install 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)

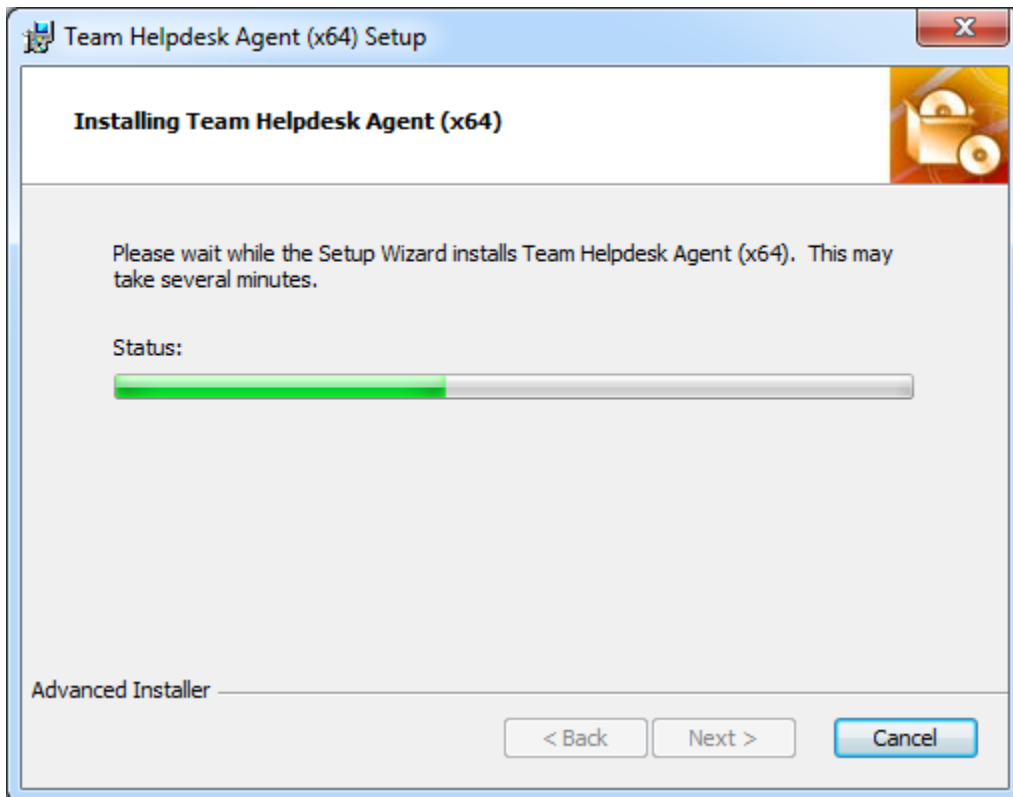


Step 3. Click 'Install' to continue the files extraction.



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

Page | 3

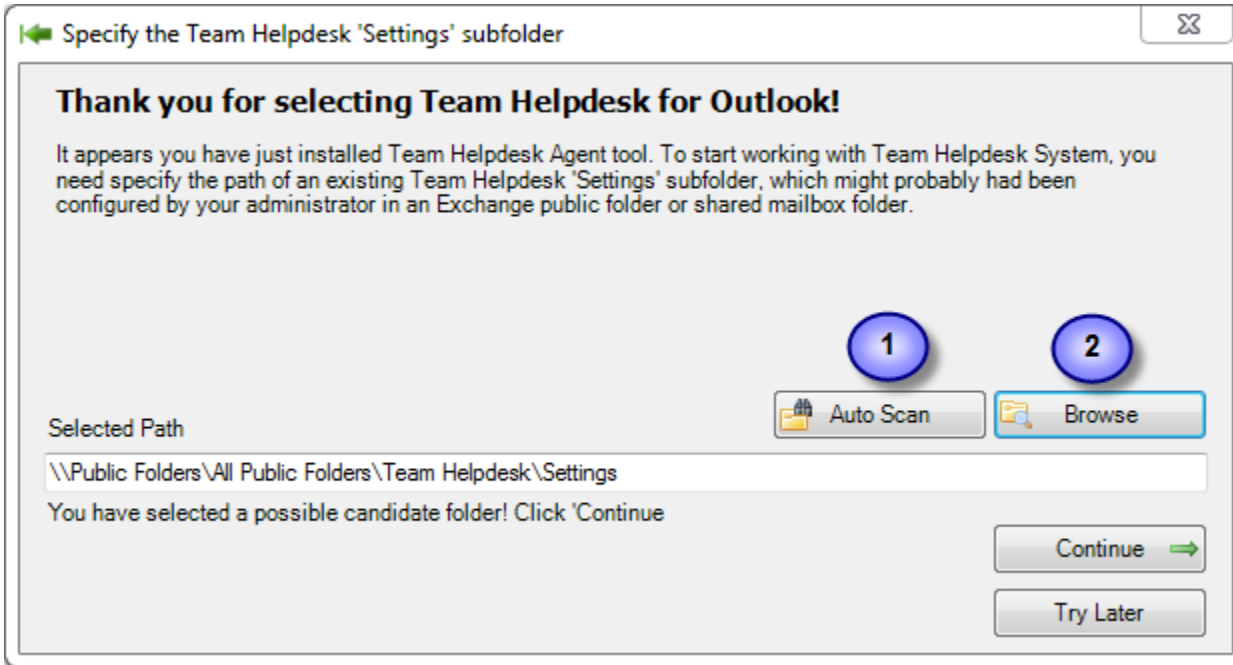


Step 5. Click 'Finish' to end the installation wizard.



Now start Microsoft Outlook. If the agent addin installation was successful, you will see a new menu item 'Team Helpdesk Agent SP' in Outlook (after help menu).

Step 6. The final step of the Agent add-in installation is linking up the Team Helpdesk Agent add-in with a configured Team Helpdesk ‘Settings’ subfolder. When you start Outlook, You will be given the option to select the existing ‘Settings’ subfolder, to link up the Team Helpdesk Agent add-in with the existing Team Helpdesk folders and database.

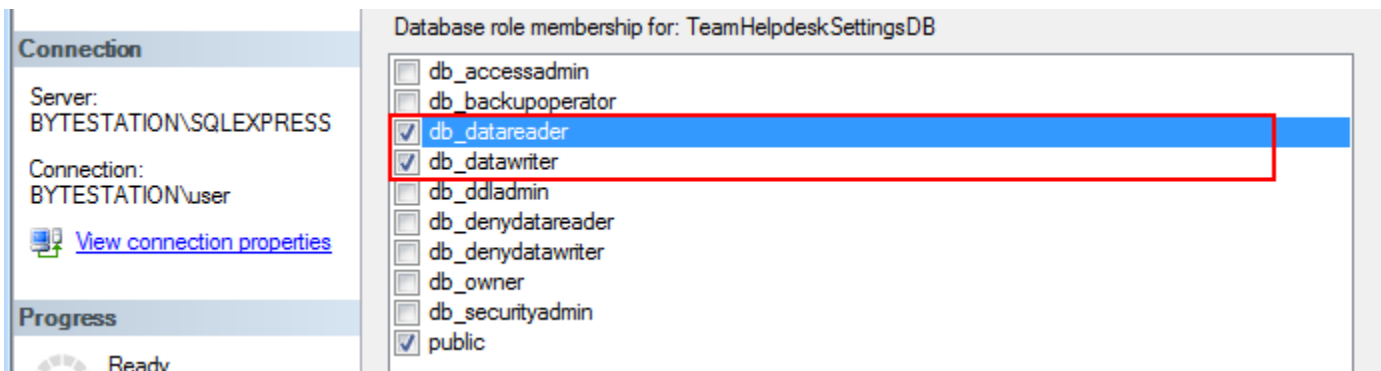


Either you can **auto scan (1)** to search for the first available ‘Settings’ subfolder. If you already know the location of the existing Team Helpdesk folders, you can simply click the ‘Browse’ (2) button to specify the ‘Settings’ subfolder from your Outlook. Once you have selected the path to the ‘Settings’ subfolder, click ‘Continue’.

If you have chosen the correct ‘Settings’ helpdesk subfolder, Team Helpdesk Agent add-in should be able to make connection to the Team Helpdesk database, and you should be able to see Team Helpdesk specific toolbars and ribbons in the Explorer and Inspector windows of your Outlook.

Additional step for Technicians/Agents on the SQL database.

If your administrator had configured Team Helpdesk to store the settings and other configurations in a SQL server database, then please 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 Team Helpdesk SQL database.

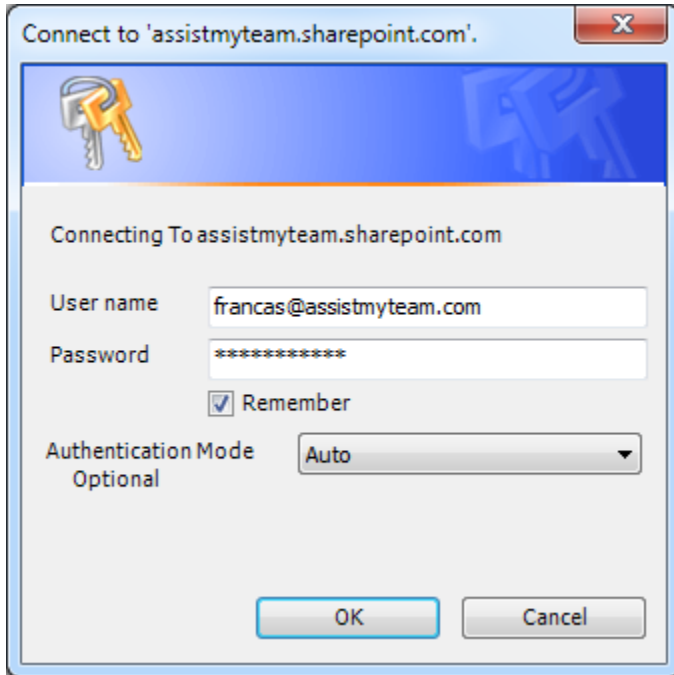


Additional steps for Technicians/Agents on the SharePoint Site.

i) **Your permission to the SharePoint site** - Make sure that you have at least 'Contribute' (or 'Full Control') permission over the SharePoint site.

ii) **Login Credential** - When you run Outlook after installing the Team Helpdesk Agent tool, it may prompt you to enter your credential to connect to the SharePoint site.

Page | 5



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 prompts you (and other individual technician) to enter their credential.

Check 'Remember' so that Team Helpdesk add-in can use the same credential to logon to the SharePoint site in subsequent connection.

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'. If you are unsure, just choose 'Auto'.

---- End of Agent Install Guide