

Team Helpdesk for Outlook & SharePoint

Managerial Installation and Configuration

(for version 6 and above)

Team Helpdesk System consists of two separate installs – **Manager** and **Agent**. 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 Agent install is for the technicians/agents 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 agent tool also needs to be installed, apart from the managerial portion).

There are two different setups – one each for 32-bit Outlook and 64-bit Outlook

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

TeamHelpdeskSPSetups_x86.zip (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)

TeamHelpdeskSPSetups_x64.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

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

TeamHelpdeskSPSetups_x86_Citrix.zip (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)

TeamHelpdeskSPSetups_x64_Citrix.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

The downloaded zip file contains 3 files – *TeamHelpdeskSPManagerSetup_xXX.exe*, *TeamHelpdeskSPAgentSetup_xXX.exe* and *VersionInfo.txt* where 'xXX' can be either x86 (32bit Outlook) or x64 (64bit Outlook)

Extract these file contents to a file folder.

It is recommended that you place the Agent setup files (*TeamHelpdeskSPAgentSetup.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.

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

In 'Per User Installation', the Team Helpdesk Manager 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:

- .NET framework 3.5 or above
- Outlook 2003, 2007, 2010, 2013, 2016, 2019.
For Outlook 2007, you should have SP3.
- Exchange Accounts configured in Outlook (POP, IMAP or local PST can only be used for testing. However, the functionality of Team Helpdesk will be very limited)
- Team Helpdesk requires a database to save the global settings and configurations. Supported databases are Microsoft SQL Server, Microsoft Access, Microsoft Exchange or Microsoft SharePoint.
 - All SQL Server versions are supported including Express edition. SQL server should be on the local office network accessible by all users of Team Helpdesk from their Outlook.
 - For Microsoft Access database, a dedicated shared network folder, preferably a UNC path is required accessible to all users of Team Helpdesk.
 - All Microsoft SharePoint versions including Office 365 SharePoint Online are supported.

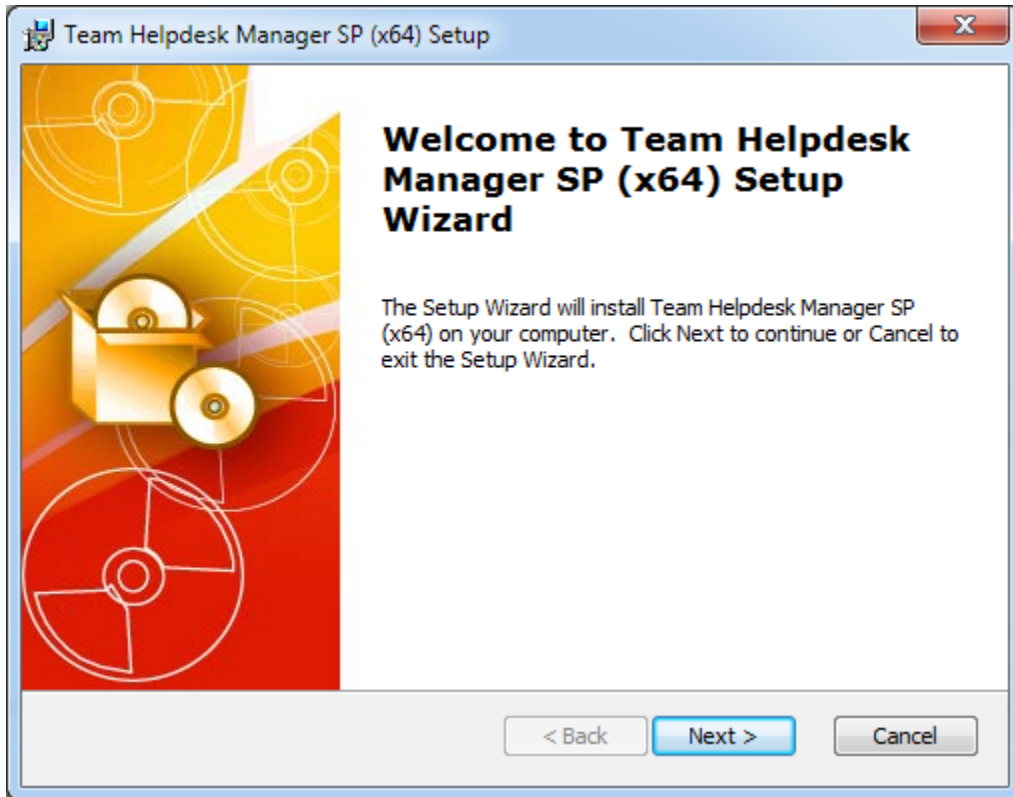
There are two sections in managerial installation:

a) **Outlook Add-in Installation**, b) **Exchange Folder Configurations**, and c) **SharePoint Fields Mapping**

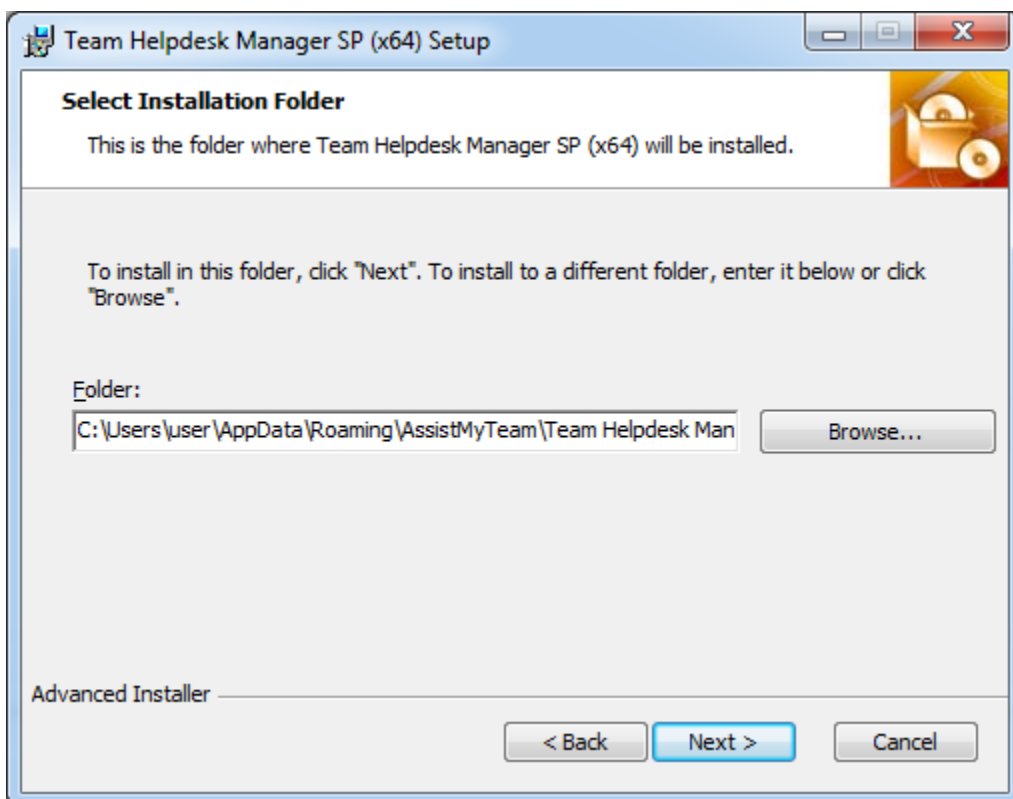
a) Managerial Add-in Installation

Step 1. Run the *TeamHelpdeskSPManagerSetup_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2007 (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.

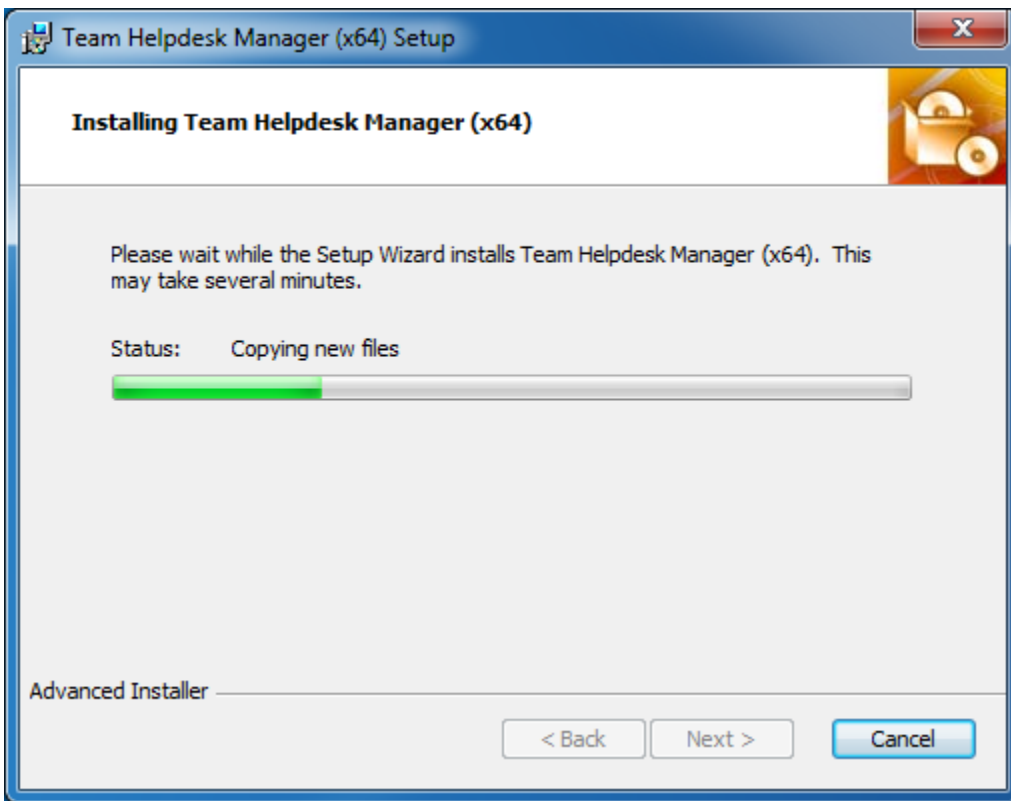
Page | 2



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. It just takes a few minutes to complete the whole copying process



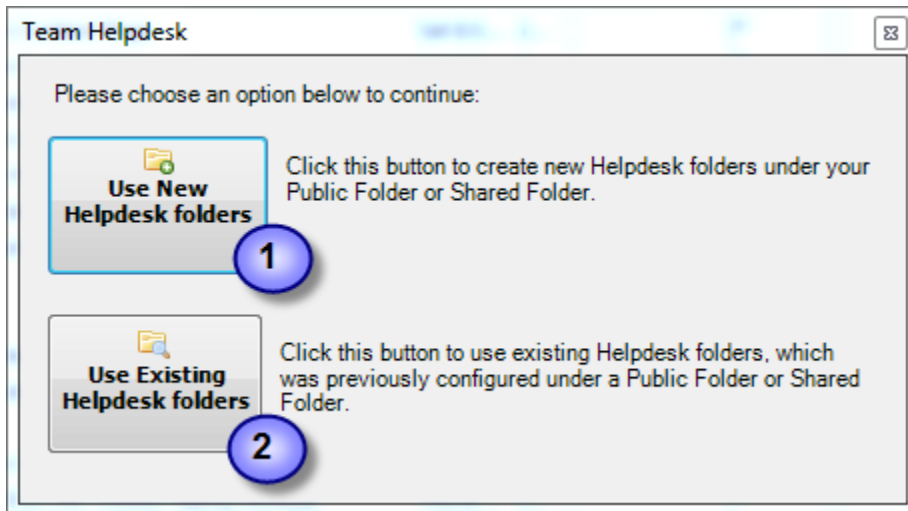
Step 4. Click '*Finish*'. This ends the files installation process in your system.



Installation steps in 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:

Page | 4



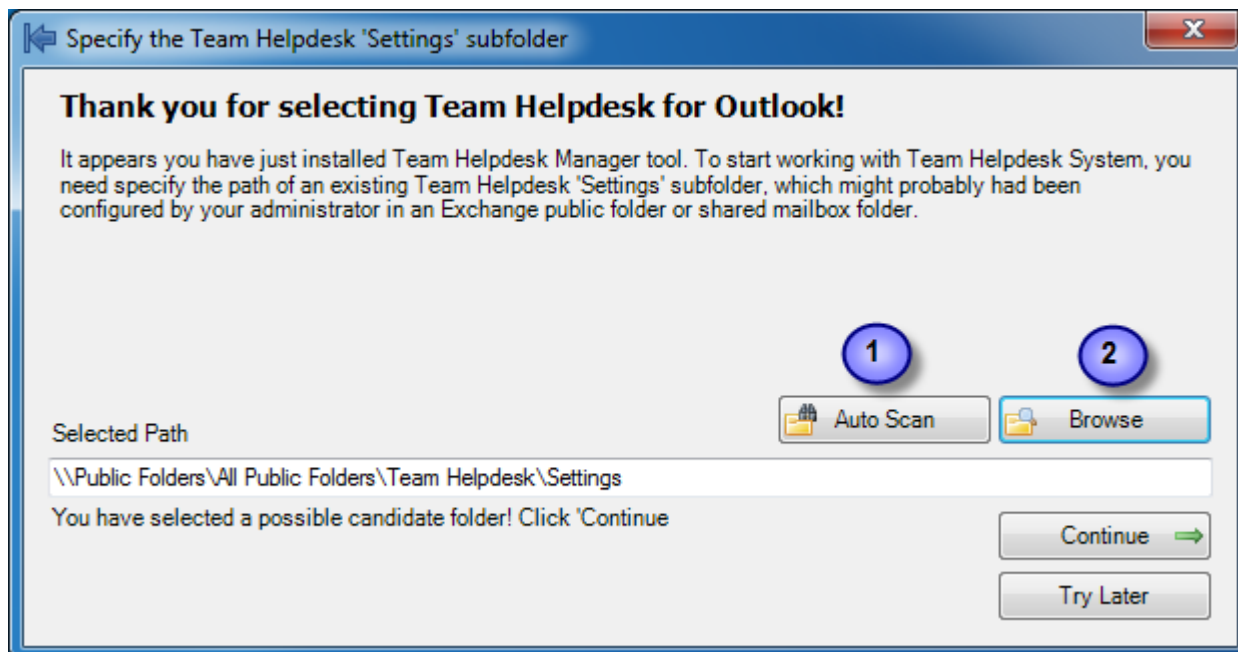
1

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

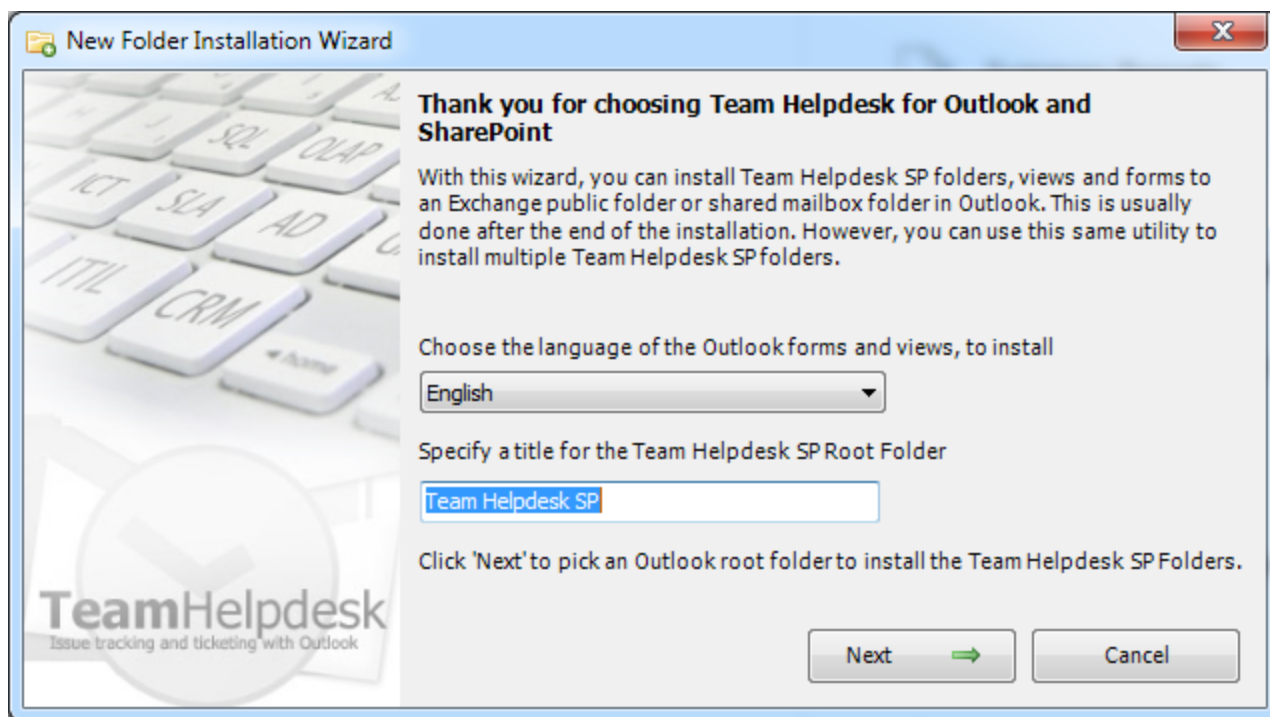
Use Existing Team Helpdesk folders – Click this button to use existing Team Helpdesk folders (*i.e.*, *Ongoing Cases*, *Resolved Cases*, *KB*, *Schedules*, *History and Settings*) which had been already configured by another helpdesk manager/administrator. This scenario is generated when multiple helpdesk 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 6 and 7 would be not applicable, with this route.

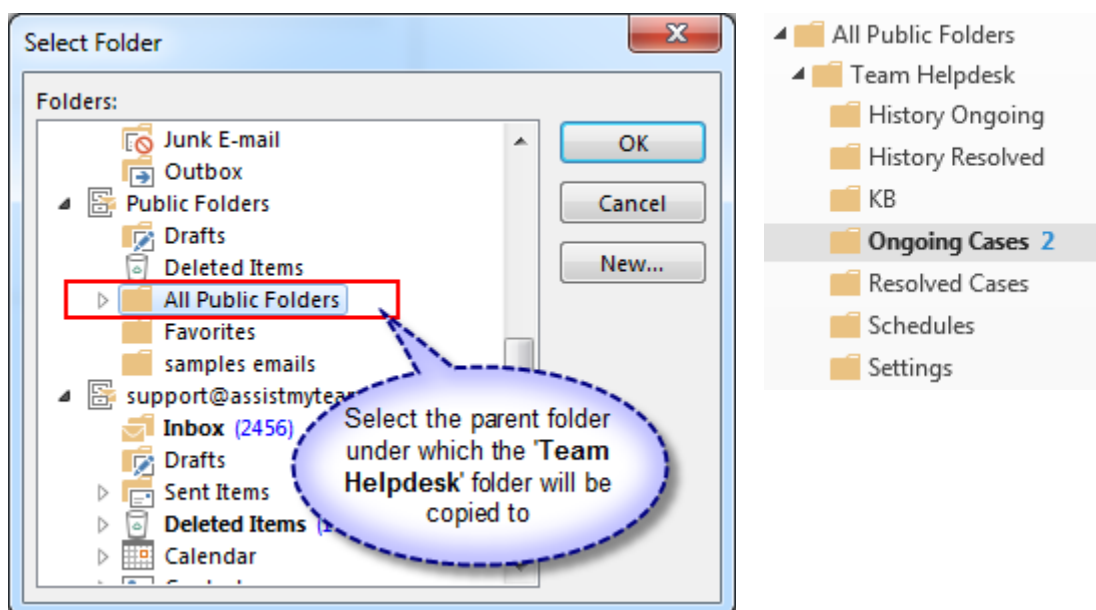
Step 6. A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent Team Helpdesk folder that will be created. By default, it has a title of 'Team Helpdesk SP'.



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

- Dutch
- Finnish
- French
- English (default)
- Espanol
- German
- Norwegian
- Swedish

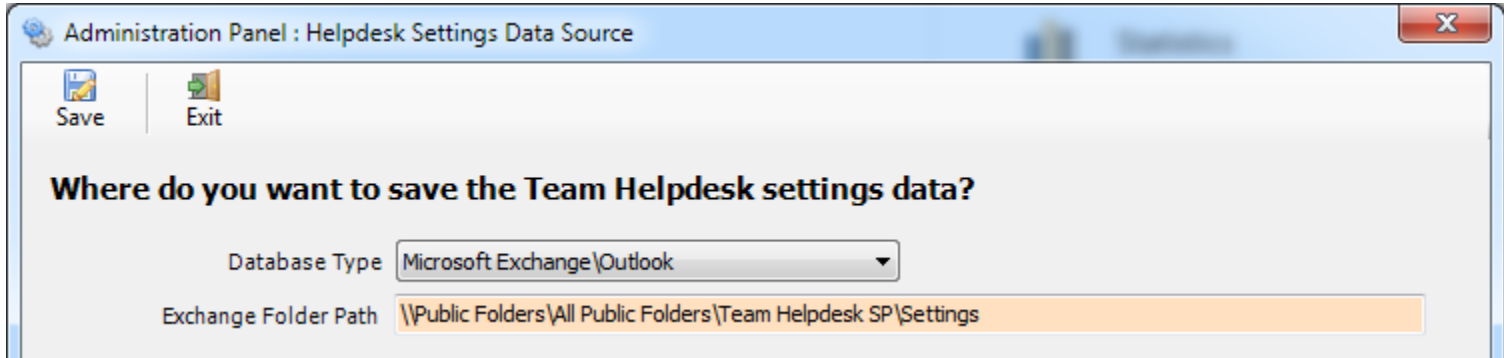
Step 7. Clicking 'Next' button would enable you to select an Outlook parent folder where the specified Team Helpdesk root folder would be created. If Microsoft Outlook is not already opened, it would be started automatically. The tool would then copy Team Helpdesk subfolders, forms & designs, views etc. from the Team Helpdesk PST template file. It would look like the followings layout:



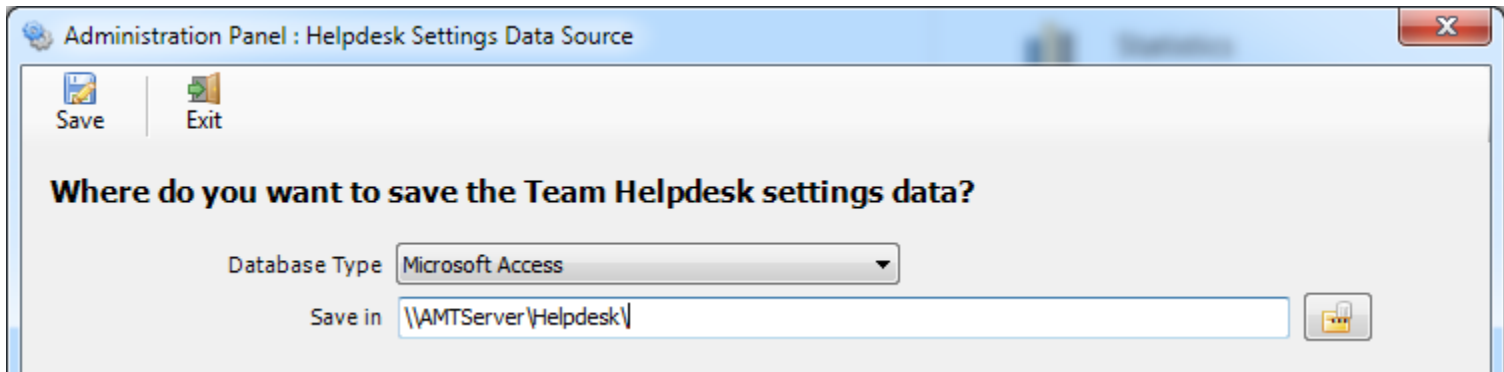
NOTE: When you start Outlook, if you are not prompted for the option to copy a new Team Helpdesk folder, or choose existing one, then most likely, there might be remnants of earlier installation. In such scenario, go to **Outlook > Team Helpdesk Manager SP** menu and click 'Copy a New Team Helpdesk folder'. 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. Support database options are **Microsoft Exchange/Outlook**, **Microsoft Access**, **Microsoft SQL Server** or **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 environment.*

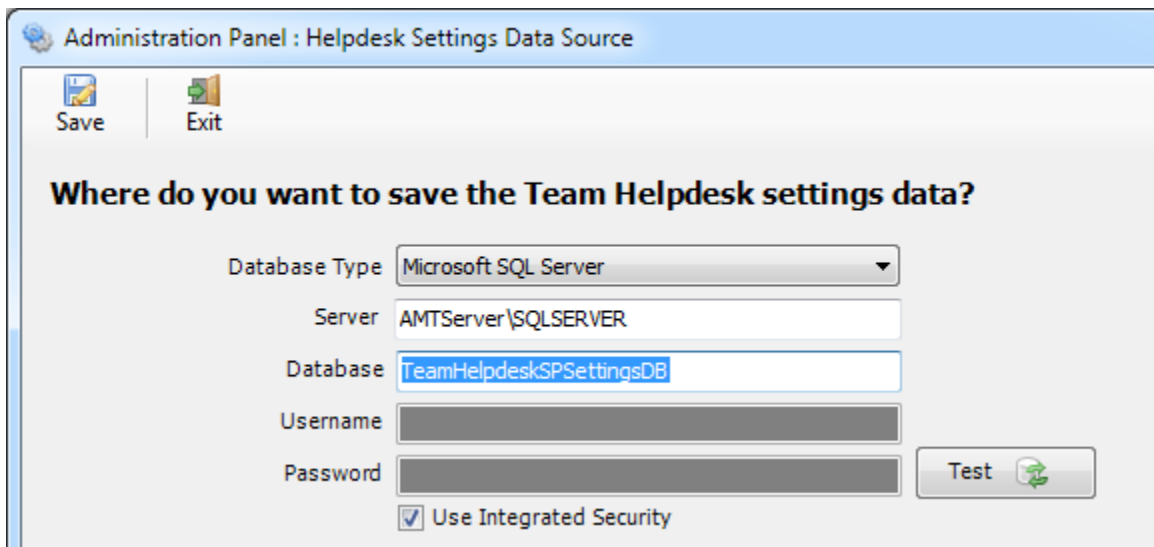


ii) Microsoft Access - If you choose Access, the database will be placed on a shared network folder such that all technicians working on the support cases in Outlook have access to the network folder. When you specify the location where the MDB file is to be created, make sure you choose a UNC path (e.g. \\AMTServer\Helpdesk) instead of a mapped one because, a mapped drive might only be accessible to you. 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 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.

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.

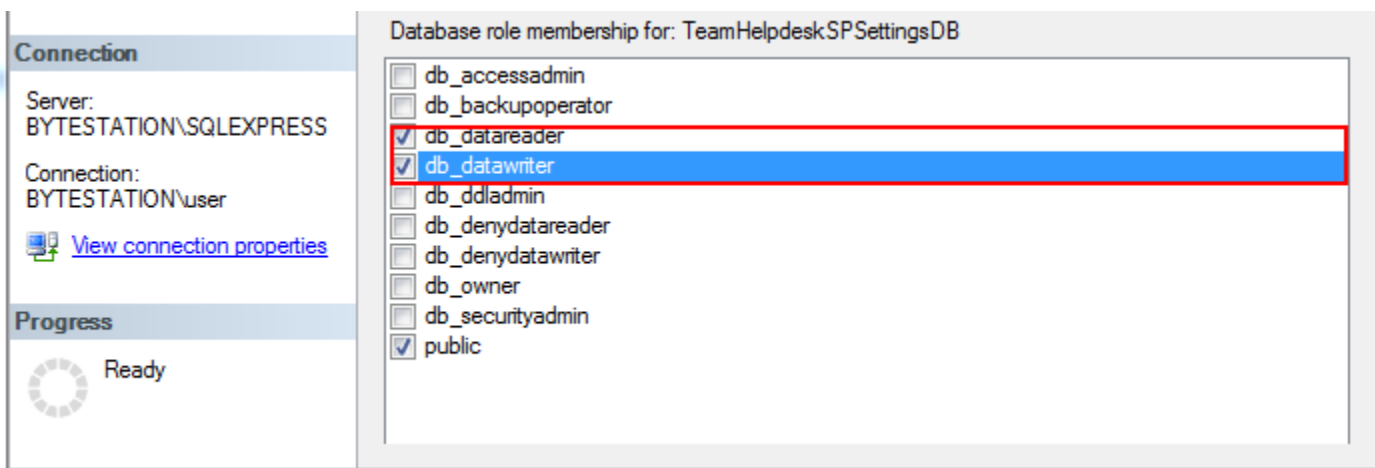


For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name 'TeamHelpdeskSPSettingsDB' would be created. If your SQL server is configured to use windows authentication (NTLM), then you can check the 'Use Integrity Security' option to 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.

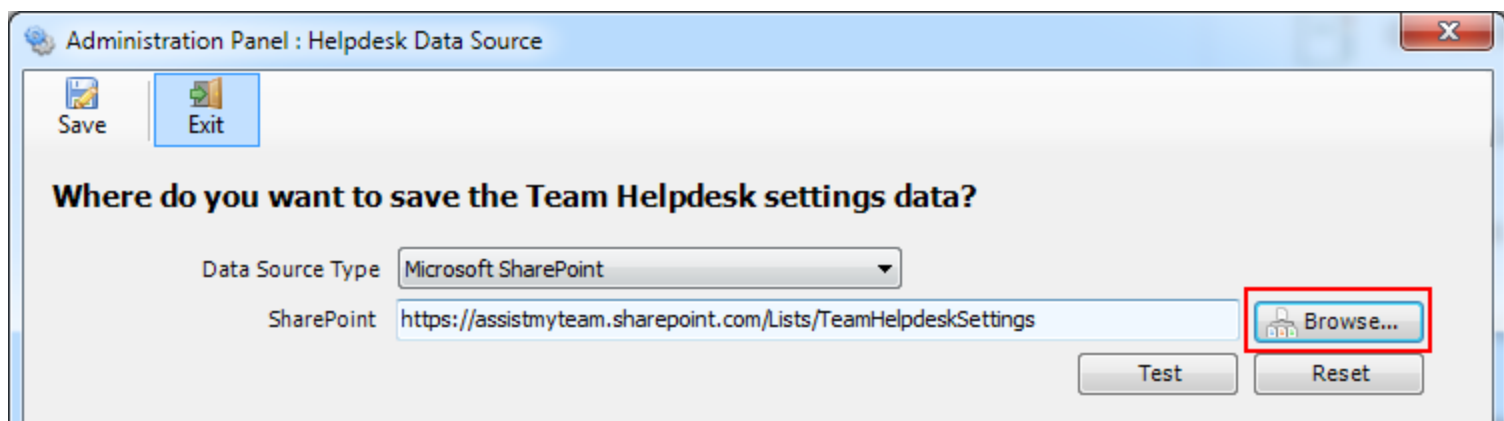
NOTE: When choosing a SQL server database for Team Helpdesk System, if you are not using the 'Integrated Security' (also known as Windows Authentication, or NTLM authentication), then it is very important that the particular SQL user account you use here, is usable by all Team Helpdesk Agents from different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

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.

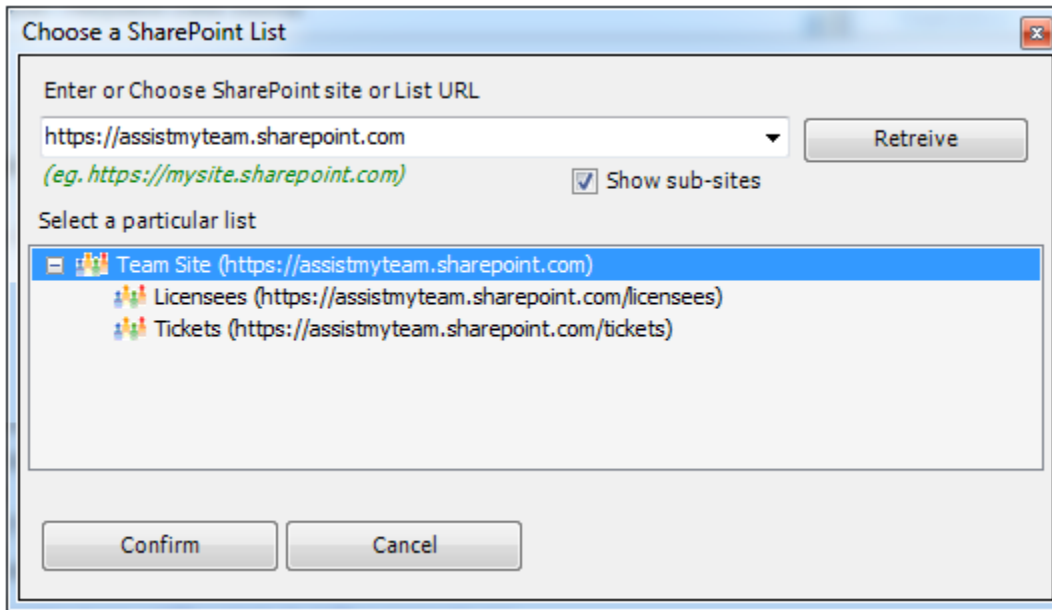


iv) Microsoft SharePoint – The last helpdesk database option 'Microsoft SharePoint' allows you to use your SharePoint site to store the helpdesk settings, drop down lists, email templates and other global configurations such that all your technicians can access it from the internet or WAN. This is ideal 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.

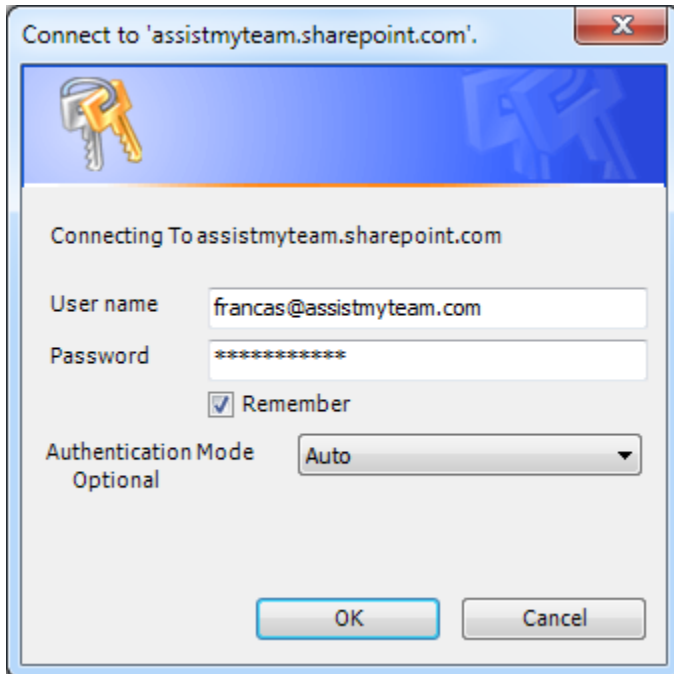


To specify a SharePoint site, click the 'Browse...' button. This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format *http://mySharePointsite*. And click 'Retrieve' to show all available sub-sites and lists.

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 'TeamHelpdeskSPSettings' list automatically.



And then select the particular site under which the Helpdesk settings would be stored, and then click 'Confirm'. Team Helpdesk will automatically create and configure a new SharePoint list titled 'TeamHelpdeskSPSettings' 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.



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'.

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 'TeamHelpdeskSPSettings'.

You can use any SharePoint version starting with WSS 2.0 to the latest SharePoint 2020. You can use Office 365 SharePoint Online too.

b) Managerial Exchange Folder Configurations

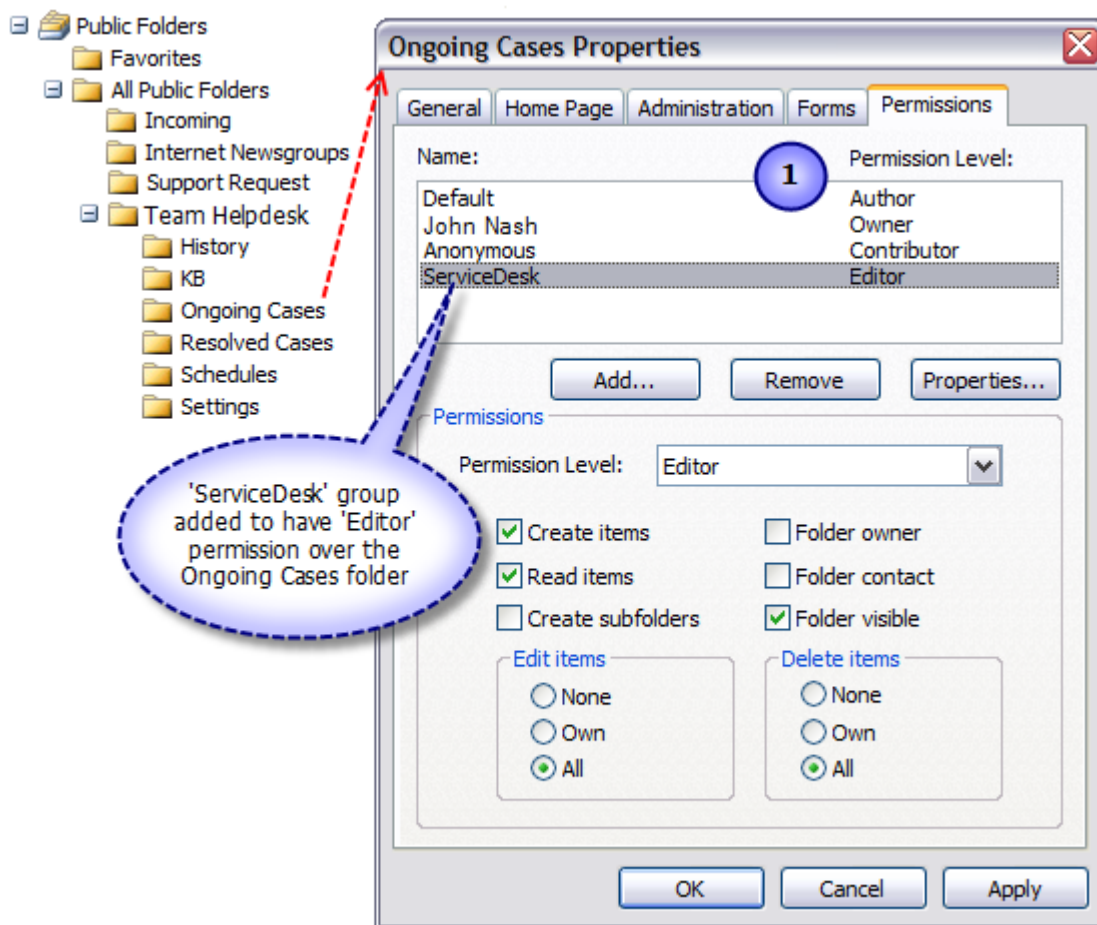
Now that you have installed - Team Helpdesk files into your system and Team Helpdesk folders into your public folder or mailbox, administrator would need to configure the permission level of each Team Helpdesk folder, namely, the **History, KB, Ongoing Cases, Resolved Case, Schedules** and **Settings**. 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 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	At least ' Editor ' permission to all helpdesk technicians
	'Publishing Editor' permission to technicians with admin-access*

*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.

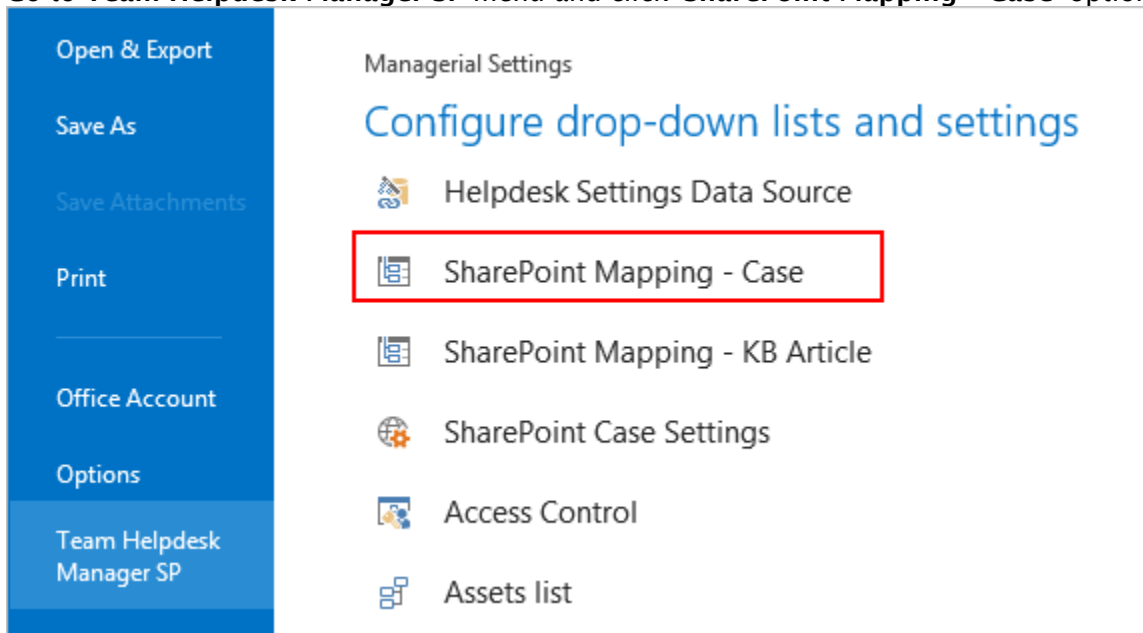
We recommend that a user's group consisting of all agents/technicians of the helpdesk be created such that helpdesk manager (owner) can easily assign permission to the group as a whole, instead of undergoing multiple steps of selecting and granting the same permission to each technician. *In the example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



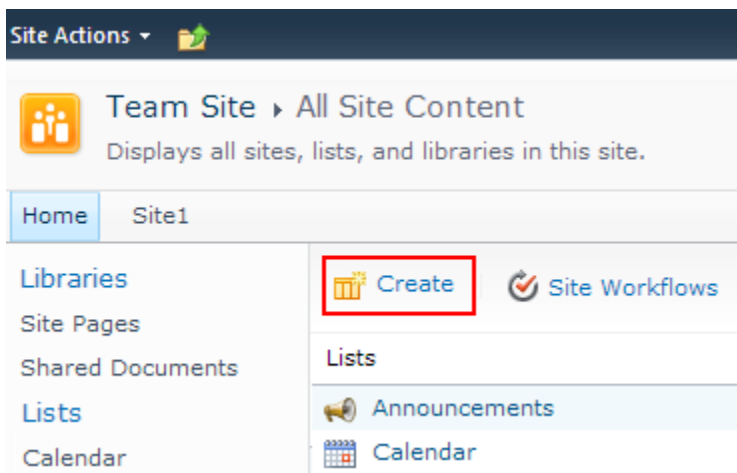
c) SharePoint Fields Mapping for Case and KB article

When a support case is raised in Outlook, Team Helpdesk will also create a corresponding copy of that case in an admin specified SharePoint list. As an administrator, you can choose which Outlook helpdesk fields get included in the SharePoint copy of the case. All you need to do is map the Outlook helpdesk fields with relevant fields of the SharePoint list. Mapped settings are then accessible by all technicians in the helpdesk.

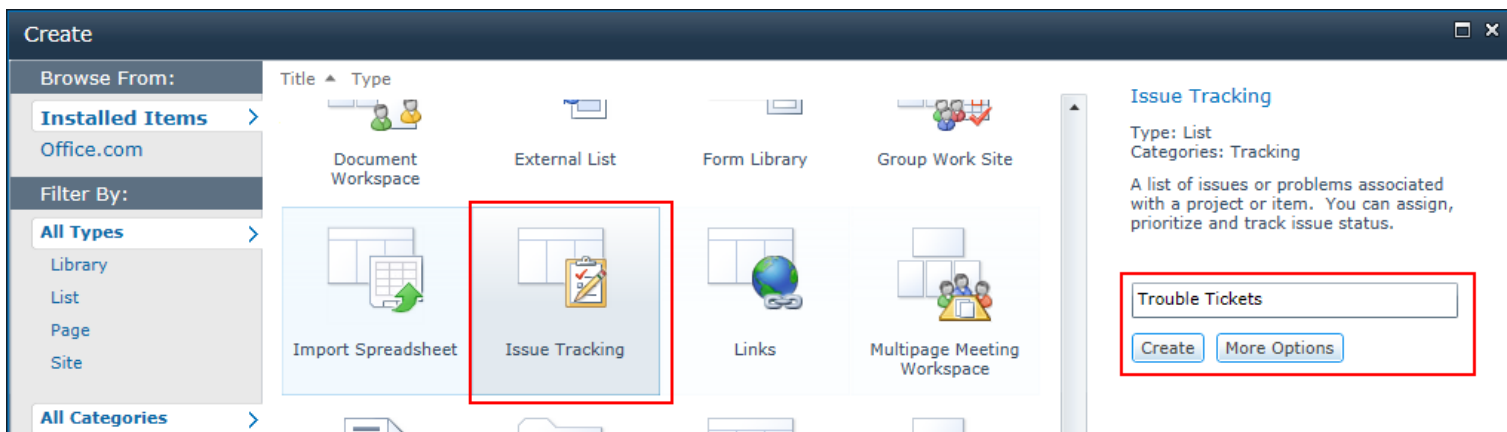
Page | 10 Go to **Team Helpdesk Manager SP** menu and click **'SharePoint Mapping - Case'** option.



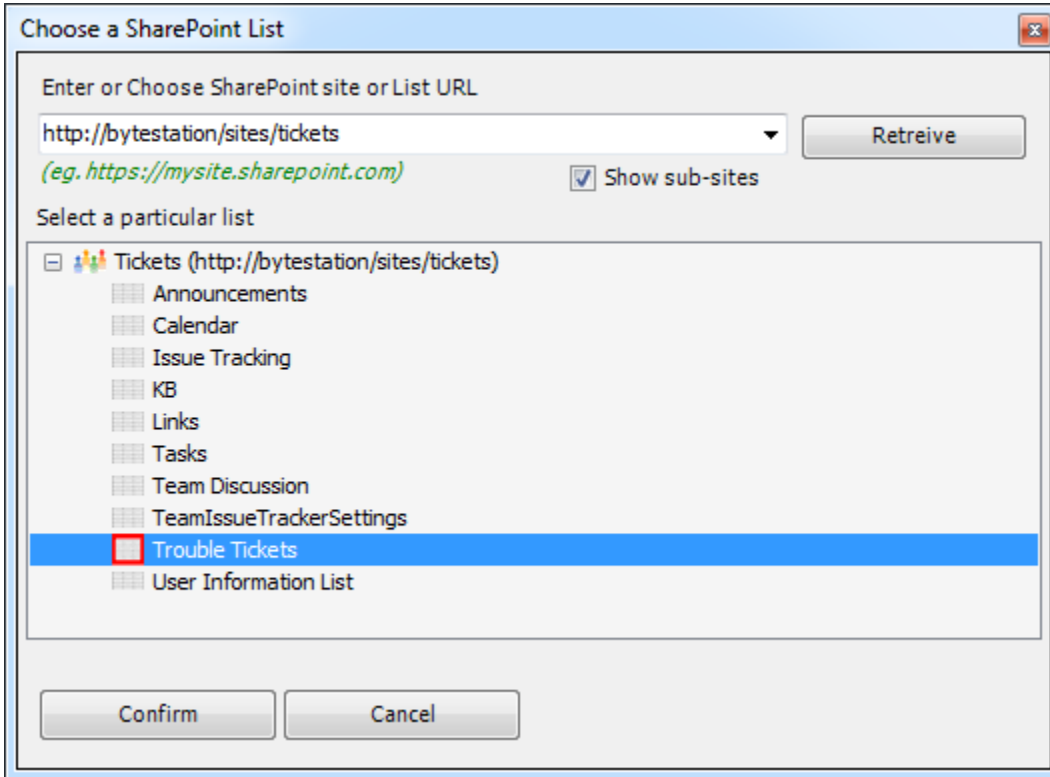
This will allow you to enter the URL of your SharePoint site to choose the particular destination SharePoint list under which copies of the cases raised in Outlook will be synchronized and stored. You can choose re-use existing SharePoint lists or create new one for this purpose. Ideally, we recommend that the SharePoint list you will choose for used with Team Helpdesk was derived from the 'Issue Tracking' template in your SharePoint. This is because such SharePoint list already comes with predefined helpdesk fields and views which can be directly ported with Team Helpdesk's functionality.



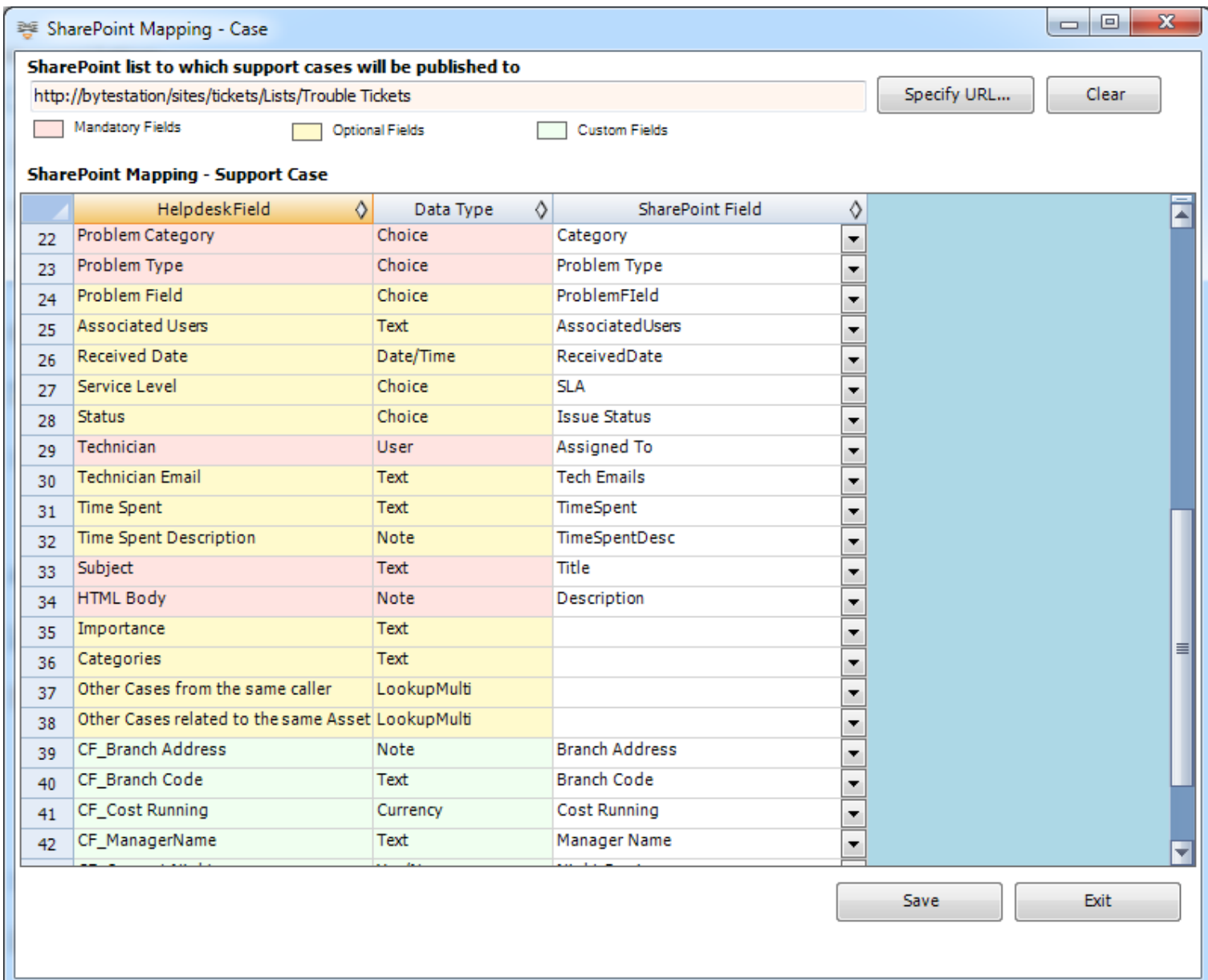
For instance, you can create a new list (e.g., *Trouble Tickets*) based on the 'Issue Tracking' template below:



And then choose this newly created SharePoint list (e.g. *Trouble Tickets*) or any other existing lists from the mapping tool and click **‘Confirm’**.



Now, you can start mapping the fields between Outlook and SharePoint.



In the mapping dialog box (above), the first column lists all the Helpdesk Outlook fields. The second column displays the data type of the field. In the third column, there is a drop-down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field.

For example, in the screenshot above, Outlook Helpdesk field 'Subject' is mapped to SharePoint field 'Title', and Outlook Helpdesk field 'HTML Body' to SharePoint field 'Description' etc.

Create New SharePoint Field - on the fly.

In the drop-down list of the SharePoint field, you will also notice that there is an item '[NEW LIST FIELD]'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePoint site.

36	Categories	Text	
37	Other Cases from the same caller	LookupMulti	
38	Other Cases related to the same Asset	LookupMulti	
39	CF_Branch Address	Note	Branch Address
40	CF_Branch Code	Text	[NEW LIST FIELD]
41	CF_Cost Running	Currency	Title
42	CF_ManagerName	Text	Tech Emails
43	CF_Open at Night	Yes/No	Origin
44	CF_Opening Date	Date/Time	CallerAddress
45	CF_Staffs Count	Number	CallerCompany
46	CL_Zonal	Choice	Caller Mobile
			Caller Phone

Field Name

Specify a unique name for the new field!

Branch Code

OK Cancel

Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.

The new SharePoint field will have the same data type as that of the corresponding Outlook field.

38	Other Cases related to the same Asset	LookupMulti	
39	CF_Branch Address	Note	Branch Address
40	CF_Branch Code	Text	Branch Code
41	CF_Cost Running	Currency	Cost Running
42	CF_ManagerName	Text	Manager Name
43	CF_Open at Night	Yes/No	Night Service
44	CF_Opening Date	Date/Time	Opening Date
45	CF_Staffs Count	Number	Total Staffs
46	CL_Zonal	Choice	Zonal

Mandatory Fields for Mapping.

Note that the following Outlook Helpdesk fields are mandatory when you perform mapping:

Subject, HTML Body, Caller Name, Technician, Problem Category, Problem Type, Due Date, Resolved.

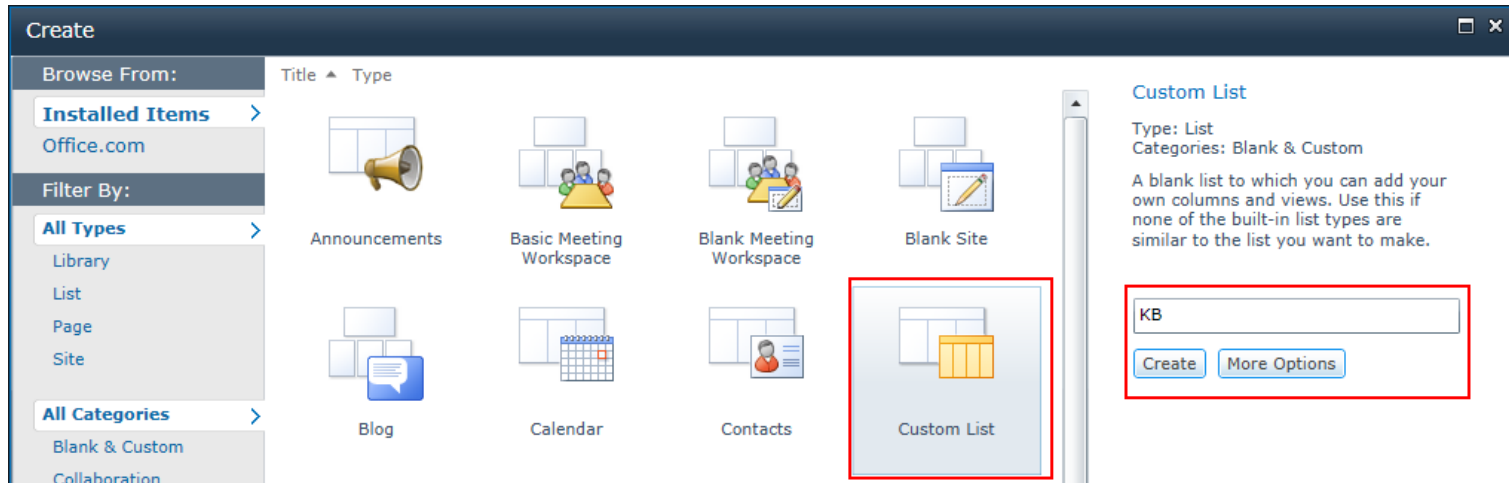
If any of these mandatory field(s) are not mapped, you will get a '*mandatory fields not mapped*' warning message and the settings won't be saved.

Available Helpdesk Fields in Outlook for mapping to SharePoint:

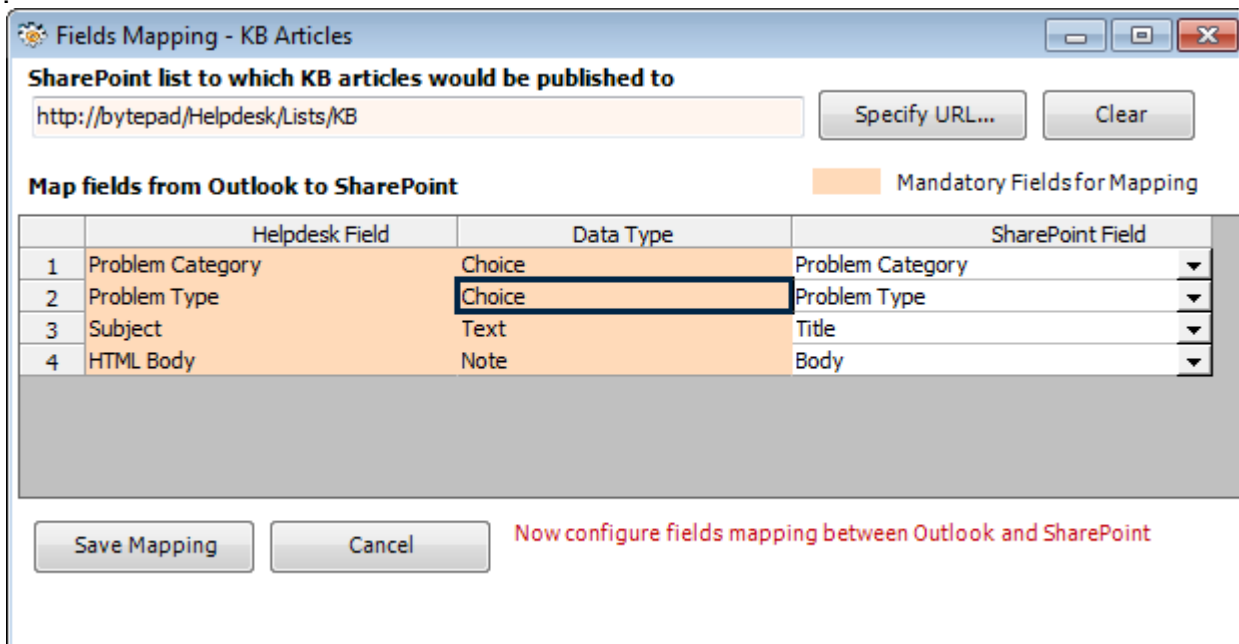
Asset Name, Asset Field 2, Asset Field 3, Asset Field 4, Asset Field5, Author, Caller Address, Caller Company, Caller Department, Caller Mobile, Caller Phone, Resolved, Date Closed, Date Created, Due Date, Log, Notes, Origin, Problem Category, Problem Type, Received Date, Service Level, Status, Technician, Technician Email, Time Spent, Time Spent Description, Subject, Body, HTML Body, Importance, Categories, Other Cases from the same caller, Other Cases related to the same Asset.(and any custom fields you have defined)

Likewise, when a KB article is published in Outlook, you can choose which Outlook KB fields get included in the SharePoint copy of the KB article. All you need to do is map the Outlook KB fields with relevant fields of the SharePoint list. Mapped settings are then accessible by all technicians in the helpdesk. For KB mapping, you can use a simple custom list as it does not require that many fields.

For instance, you can use the ‘Custom List’ template to create a new SharePoint list ‘KB’ for used with Team Helpdesk to store the KB articles.



And then choose this newly created SharePoint list (e.g. KB) or any other existing lists.



In the mapping dialog box (above), the first column lists all the KB Outlook fields. The second column displays the data type of the field. In the third column, there is a drop-down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field.

For example, in the screenshot above, Outlook KB field ‘Subject’ is mapped to SharePoint field ‘Title’, and Outlook Helpdesk field ‘HTML Body’ to SharePoint field ‘Body’ etc.

Available KB Fields in Outlook for mapping with SharePoint
 Subject, Body, HTML Body, Problem Category, Problem Type.