

Tele-Support HelpDesk Version 4.0 Quick Start

Note: This is for FIRST TIME INSTALLATIONS, NOT UPGRADES. Go to the version 4.0 tech support for Upgrade Instructions or call our tech support department.

There are three main components of Installing Tele-Support HelpDesk.

The "Server Installation"	(required one time only)
The "Client Installation"	(per desired workstation)
The "Configuration Program"	(as needed-required at least once)

The "**Server Installation**" will be run only once and puts all necessary files on your file server that you will need to run HelpDesk. **This must be run on the file server machine.**

The "**Client Installation**" will be performed on any workstation that you actually wish to run the HelpDesk program. This can also include the server itself if you wish.

The "**Configuration Program**" must be run at least once to select HelpDesk's required and optional configuration options. It can also be run as often as required, either externally or from within the HelpDesk program.

So, in summary, you should:

- Choose a file server and run the HelpDesk Server Installation on the server. **Note: server installation must be performed on the file server machine.**
- Choose a workstation and install at least one client.
- Browse to the server and run the configuration program or run the "HelpDesk Tools (icon on desktop)
- Start HelpDesk by starting up the Installed client.

Installing Tele-Support HelpDesk

Tele-Support HelpDesk's main installation program, which you probably downloaded, is the same whether you are evaluating HelpDesk or have purchased it. This file is "**HelpDesk4_Install.exe**".

Running the above program will bring up a menu. From the menu, you may view various HelpDesk documentation items. Also from this menu, you may select "Server Installation" to begin installation.

Server Installation

Tele-Support HelpDesk must be installed on a file server that will be available to all workstations where users will access and run the HelpDesk program. During the server installation, you should have “**administrative rights**” on the server machine.

Run the program "**HelpDesk4_Install.exe**" from the file downloaded from our web site. This will bring up an installation menu.

Choose **Server Installation**.

Even if you are only installing onto a laptop or single computer, you need to run the server installation. **Again note..... you should install HelpDesk on your "File Server" with administrator and full access rights.**

Follow the on-screen directions. Choose a location on your file server where you will install all HelpDesk files that will be used by other workstations in your network.

By default, the installer will install to a folder under your application data directory called “HelpDesk4” (recommended this folder be sharable). The location of your application data directory will differ depending upon your server operating system. For example, under Windows XP the default installation directory would be “C:\Documents and Settings\All Users\Application Data\HelpDesk4\” while under Windows Vista, it would default to “C:\ProgramData\HelpDesk4\”. Change as desired. Follow on-screen prompts.

That completes the Server Installation.

One last thing to remember..... Sharing may be done in either simple or advanced mode. In the server folder, please make the HelpDesk4 folder "SHARABLE" so all users will have full control. If you are using “simple” file sharing mode, this is usually this is done by right clicking on the folder, choose 'Properties', then choose 'Sharing' and then checking the 'sharing' checkbox. In “advanced” sharing mode, you also may adjust “permissions” and grant all users “full control” rights to the share. You may also need to grant “full control” rights under the “security” tab.

Client Installation

Install as an “Admin” user.

Note: If you are on the same machine as the one where you installed the server, you must install the HelpDesk client from the TOOLS menu. Find the “Tools” icon on your desktop, double click on it, and run the first option, “Run Tele-Support HelpDesk Client”.

If you are not on the same machine where you installed the HelpDesk server, then go to one of the workstations from which you would like to run HelpDesk (or the file server itself if you want to run a HelpDesk client from there as well). You can install additional client workstations at any time.

To install a client, browse to the folder on your **..\server\Installers** to find the client installation program. It might be something like the following:

\\ServerName\HelpDesk4\Server\Installers\HD4Client_Install.exe.

Start the program by clicking on the file **HD4Client_Install.exe**.

This will install local program files required by helpdesk. You will need to run this program again (at a later time) on other workstations that you want to use with the HelpDesk program.

Tech Tip If you are connecting to an external contact manager, please be sure that the contact manager client software is installed on that workstation. If ACT!, you must install and run ACT! at least once prior to installing the HelpDesk client. Also, if connecting to ACT!, you must have the Microsoft .net 1.1 framework installed as well. If contact manager is GoldMine, you must install the GoldMine client and run it at least one time.

HelpDesk Configuration

You need to run this program at least once to select and point to the contact manager that you will use, either ACT!, GoldMine, Microsoft Business Contact Manager, TeamScope, Outlook, Exchange Server, or the built in Stand Alone “HelpDesk” contact manager. The program allows you to configure many options about your HelpDesk installation, but one of the things you **must** do is point to and configure your contact manager connection.

How to run hdConfig4.exe

If you are on the “Server” where you installed HelpDesk, then press "Start", "Program", "HelpDesk40 Server", and from the drop down menu, select "**Configuration**". Follow on screen prompts regarding selecting your contact manager.

or

If you are at a client workstation on which you wish to run HelpDesk, you must browse to the server where HelpDesk was initially installed, and find the “configuration” folder, such as **“\\Server Name\HelpDesk4\Server\Configuration**.

Find and run the program called **HDConfig4.exe**.

Your initial User ID is “**ADMIN**” (no quotes) and the password is blank.

Select “**Launch Contact Manager Connection Settings Wizard**”

Configure a contact manager to use with HelpDesk. This part is essential and it will test your connection before allowing you to move forward.

See the System Administrator’s manual, called **HDAdmin4.pdf** located in a folder named “Documentation” located just below HelpDesk’s “server” folder, for complete documentation on setting up and configuring Tele-Support HelpDesk.

Selecting your contact manager is required but following are some of the other things you may want to do, either initially or after playing with HelpDesk for a bit.

Setup connection to Contact Manager and test. Edit contact manager options. Build center panel custom screens as needed. Map the desired contact manager fields to the HelpDesk’s standard fields.

Add departments, users, and edit properties.	Admin Chapter 5
Setup up HelpDesk time-keeping options.	Admin Chapter 9
Setup priorities and escalation as desired.	Admin Chapter 6
Setup Category / Product as desired.	Admin Chapter 8
Choose email system to use and edit properties.	Admin Chapter 12
Add RMA or Contract Tracking or User Defined Fields other options as desired.	Admin Chapter 9 or Chapter 4
Add additional modules as desired.	