

Tele-Support HelpDesk 3.2.x to 4.1.0 Upgrade Instructions for Licensed Users

Must be at latest version of HelpDesk 3.2.1, which is **3.2.x**. From your HelpDesk3 server directory, run the TSHD321QuickUpdate.exe if needed.

Recommend to be on the server where 3.2.x is installed if possible, *Important* if you install from a client workstation, you must install from a workstation that has a 3.2.x client installed.

Recent updates to your O/S may affect installation by automatically protecting the system.

To ensure your files are installed successfully, when you select the Installer (main server, client, services, etc.,) to run, RIGHT click and select RUN AS. If the box to protect your computer is checked, uncheck and if you are not an ADMIN user complete the Admin logon to proceed with installation.

Run the Server Install program and enter your new permanent product key when prompted. If you have a licensed version of 3.2.1 and upgrade, you must use your permanent code issued by Resource Dynamics to complete the upgrade. Permanent codes must be applied within 3-days of being issued.

DO NOT install into the same directory as your existing HelpDesk3.

Once the install is completed, verify the HDConfig4.UDL, which should still be connecting to your HelpDesk3 database (UNC format).

Tech Tip:..After server files are installed, verify the registry key for local machine, software, Resource Dynamics, HelpDesk4, ServerDir = \\servername\sharedhelpdesk4\server\ (for example). VERY important that the \ end the line.

Next browse to the \server\installers directory and run the TSHD4License_Install.exe. This is the license service and needs to be installed onto a computer that all workstations have access. On the same computer, go to the Windows Firewall settings and add Port 4480. This is an internal port that needs to be open inside your network.

Next, is to activate to a live version. You need to have a client installed on the server or simply run the TSHD4Connectivity_Install.exe. Then while physically on the server (not through remote desktop or VPN connection) run the TSHDActivate41.exe program (located in the \server directory), entering your permanent product key (same one you used to install above) this will activate to a live version. Activate by Internet, enter your code. When prompted for the license server name, please enter the computer name ONLY. Continue through wizard.

Tech Tip..When prompted for the Server Directory, PLEASE browse out through the network neighborhood and return the path to the server as a UNC format \\servername\sharedhelpdesk4\server\ (again making sure the \ ends the line).

To install 4.1 clients, from the client workstation, browse to the \server\installers, be sure to run as ADMIN user. After client installation, verify the TSHD4.UDL (located in client directory) connection is UNC to the HelpDesk3 database.

Example: \\myservername\sharedhelpdesk3\server\helpdesk3.mdb

Don't worry, the UDL's will change to version 4 once you move the data

ACCESS USERS: When satisfied with the upgrade installation, run the MoveToHD4 program (located from the HDTools4 or in the\server directory) this will disable the 3.2.1 (helpdesk3.mdb) and move everything to your version 4 server directories. Remember, DO NOT rename or move any data from your HelpDesk3 directory.

Tech Tip.. After move, please check that the Post Office Boxes and Links folders moved. Also verify in Configuration, Advanced Options, the paths to the folders are correct and UNC format.

SQL USERS: If you are running the SQL database format of HelpDesk, then the actual database is not moved, but any files (such as email or links) will still be moved to the new location. When satisfied with the upgrade installation, run the MoveToHD4 program, same reminder as above DO NOT rename or move any data from your HelpDesk3 directory.

ACCESS USERS: After the MoveToHD4 is successful, and you are running the ACCESS version of HelpDesk, verify the HDconfig4.udl is correctly connecting to the HelpDesk4.mdb

SQL USERS: As indicated above, the actual database is not moved so your UDL should be the same.

When you start up your clients, after the MoveToHD4, the new UDL connection should automatically be pulled down based on the configuration UDL. If not, you may need to adjust each client to connect to the HelpDesk4.mdb. Either modify the TSHD4.udl or uninstall and reinstall the TSHD4Client_install.exe