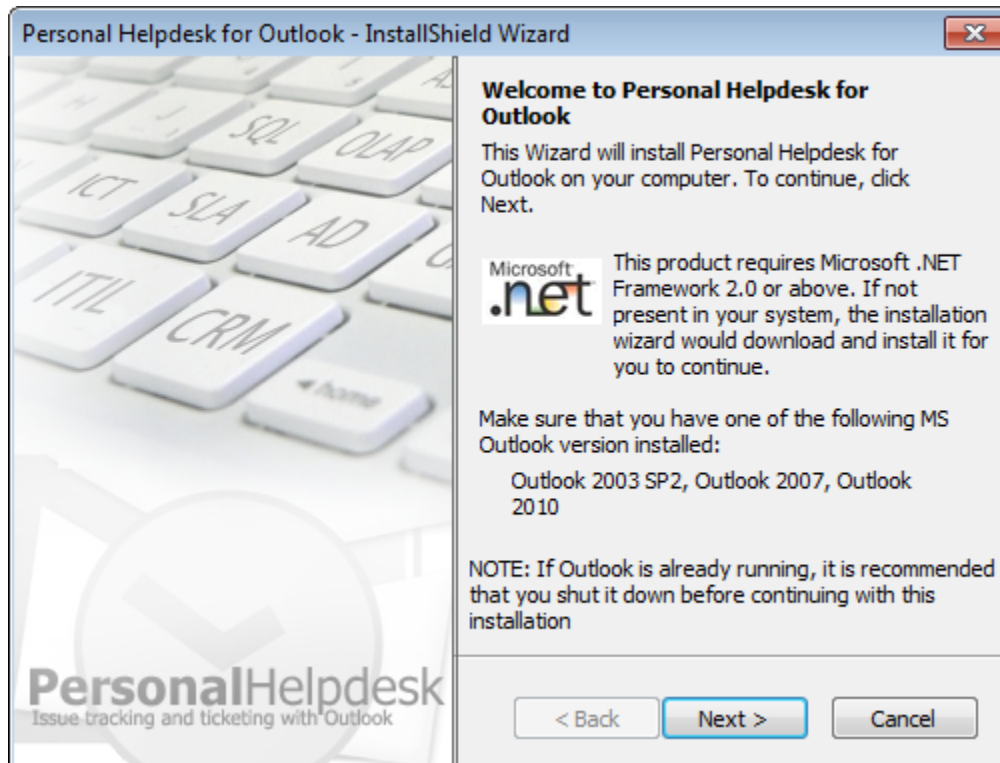


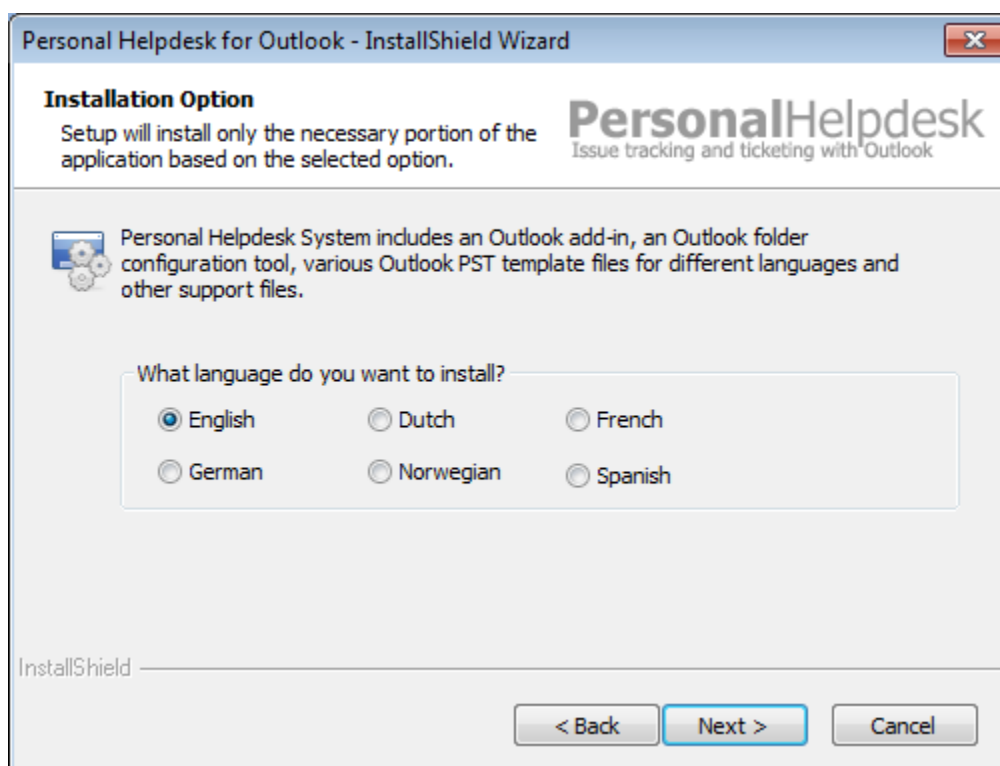
## Personal Helpdesk for Outlook – Installation & Configuration

Installation consists of copying the application files and creating the Personal Helpdesk Outlook folders. Download the installation setup from <http://www.assistmyteam.net/PersonalHelpdesk/download.asp> and run it to install.

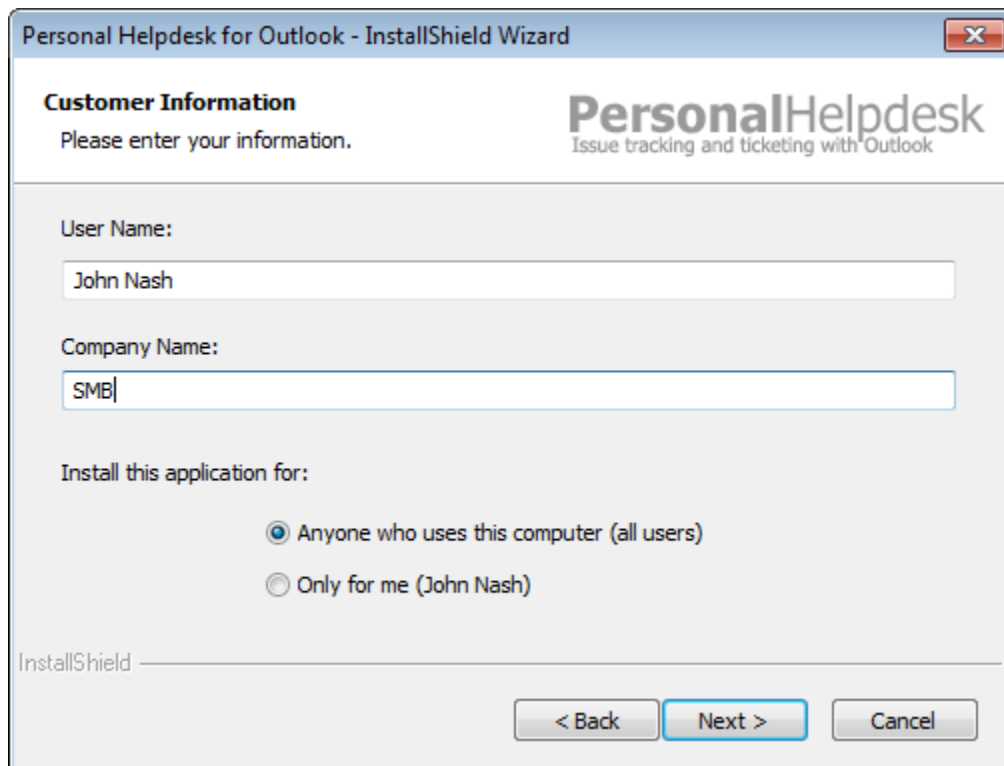
**Step 1.** Run the *PersonalHelpdeskSetup.exe* to start the installation. Click Next to Continue. If Outlook 2003 (SP2 or above) or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.



**Step 2.** In the 'Installation Option' dialog, select the language for the Personal Helpdesk folders and forms to be used and click Next. By default, English is the selected language.



**Step 3.** In the 'Customer Information' dialog, you will be prompted to select if the application has to be installed for all users or only for yourself (current user).



Personal Helpdesk for Outlook - InstallShield Wizard

**Customer Information**  
Please enter your information.

**PersonalHelpdesk**  
Issue tracking and ticketing with Outlook

User Name:  
John Nash

Company Name:  
SMB

Install this application for:

Anyone who uses this computer (all users)

Only for me (John Nash)

InstallShield

< Back   Next >   Cancel

1

- The application will be installed for all users of the system i.e., every user in that particular system will be able to use the installed application. This requires local administrative rights on the part of the current user. Also, note that, the application will be installed under the Program Files folder by default. (eg. *C:\Program Files\AssistMyTeam\Personal Helpdesk for Outlook*).

2

- The application will be installed only for the current user (yourself). With this option, the application will be installed under the user's application data subfolder by default. To use the application by another user on the same system, the user needs to again install the application on their own application data subfolder and will be available for that user only.

For examples:

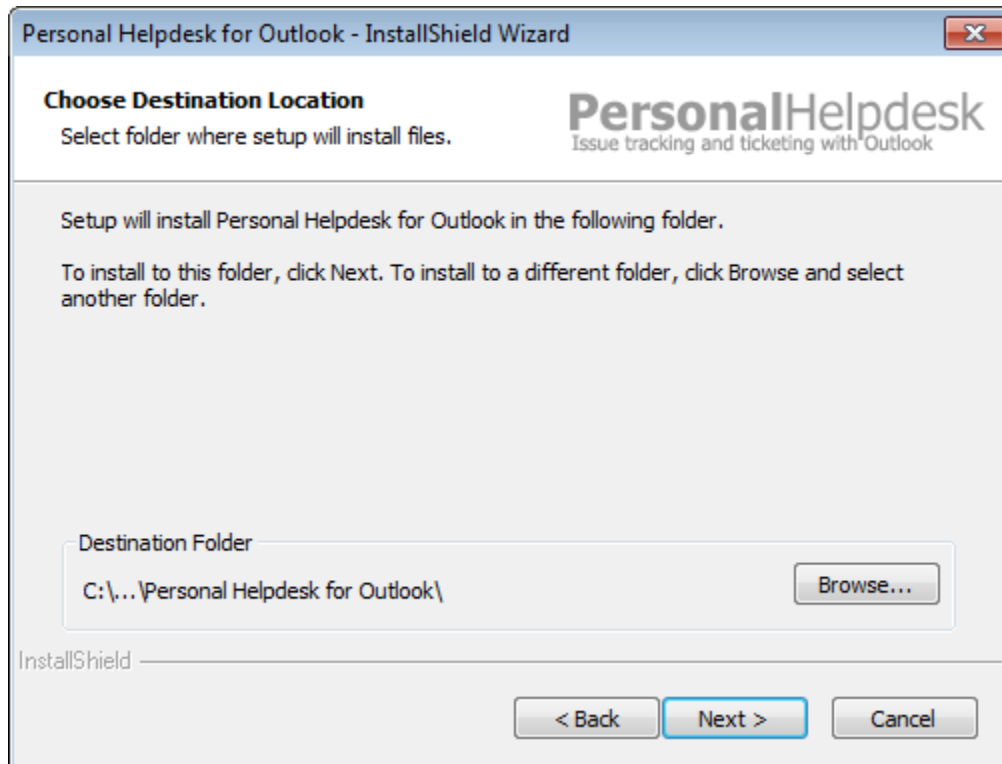
**On windows XP**

C:\Documents and Settings\Username\Application Data\AssistMyTeam\Personal Helpdesk for Outlook

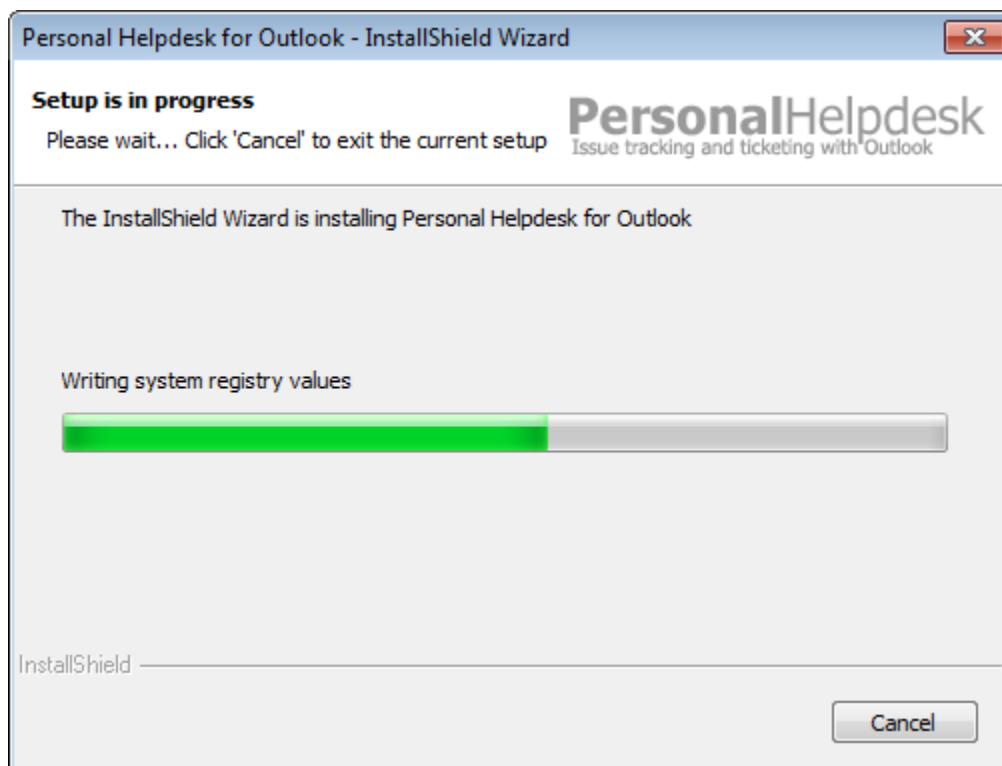
**On windows Vista/Win7**

C:\Users\Username\AppData\Roaming\AssistMyTeam\Personal Helpdesk for Outlook.

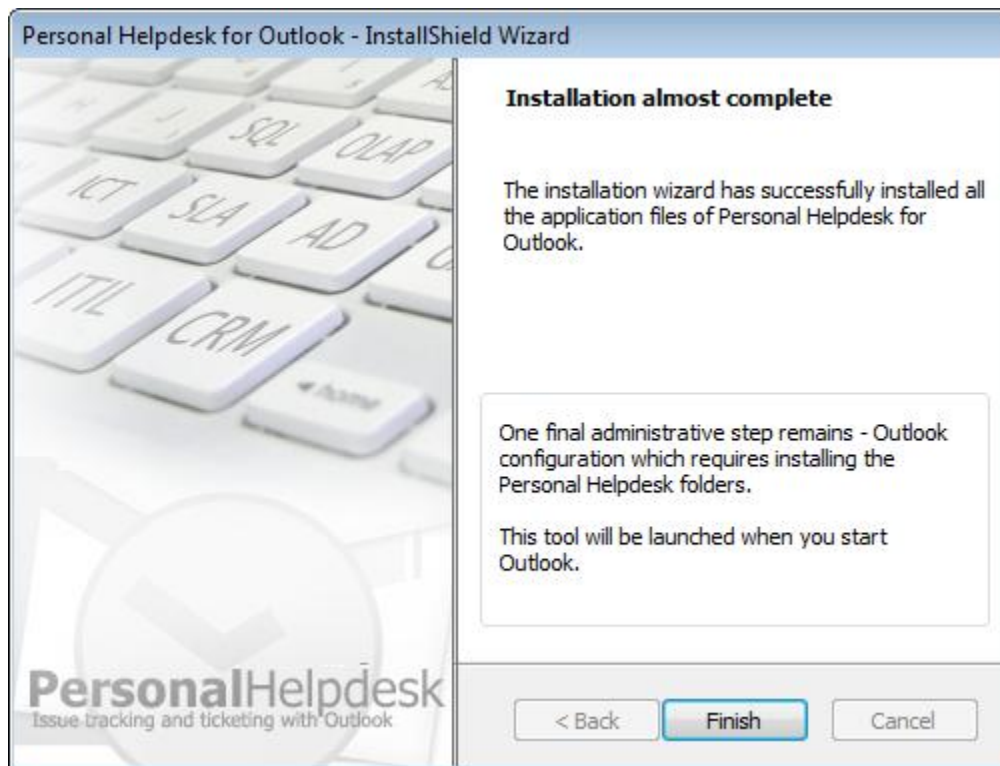
**Step 4.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)



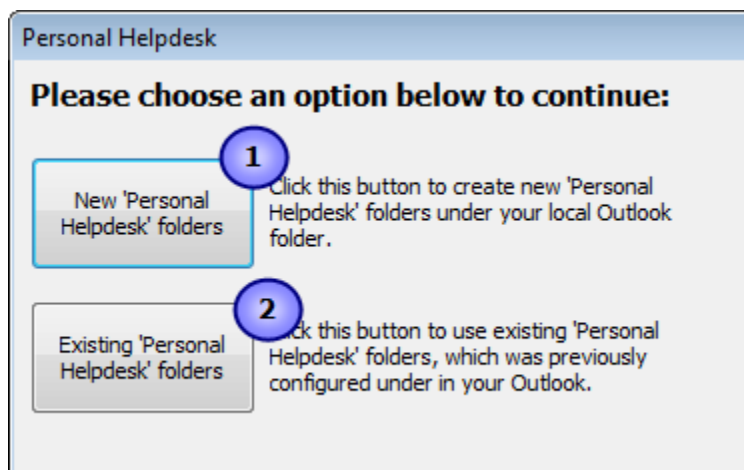
**Step 5.** Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process



**Step 6.** Click 'Finish' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



**Step 7.** 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 small dialog box, offering you two choices:



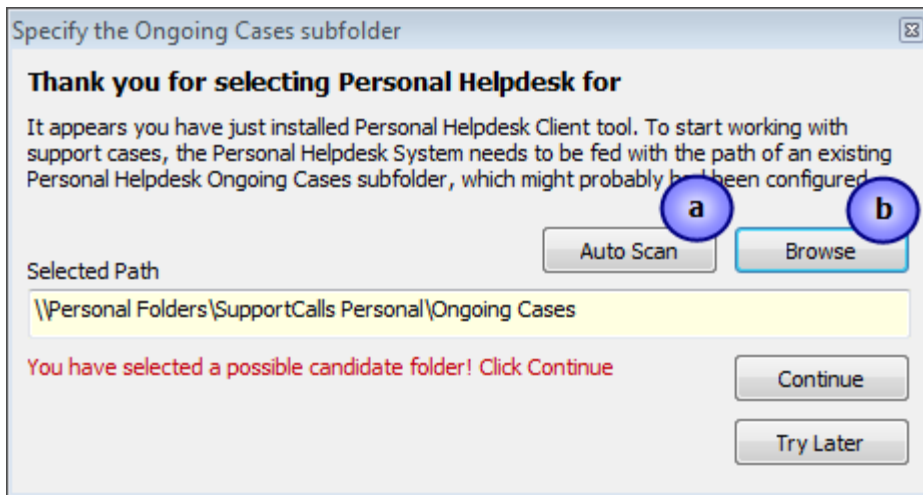
**1**

**Create New Personal Helpdesk folders** - Click this button to create new Personal Helpdesk folders (*i.e., Ongoing Cases, Resolved Cases, KB, Schedules and History*) which are customized with Personal Helpdesk specific fields, views and forms. Follow **step 8** to further go ahead with the configuration.

**2**

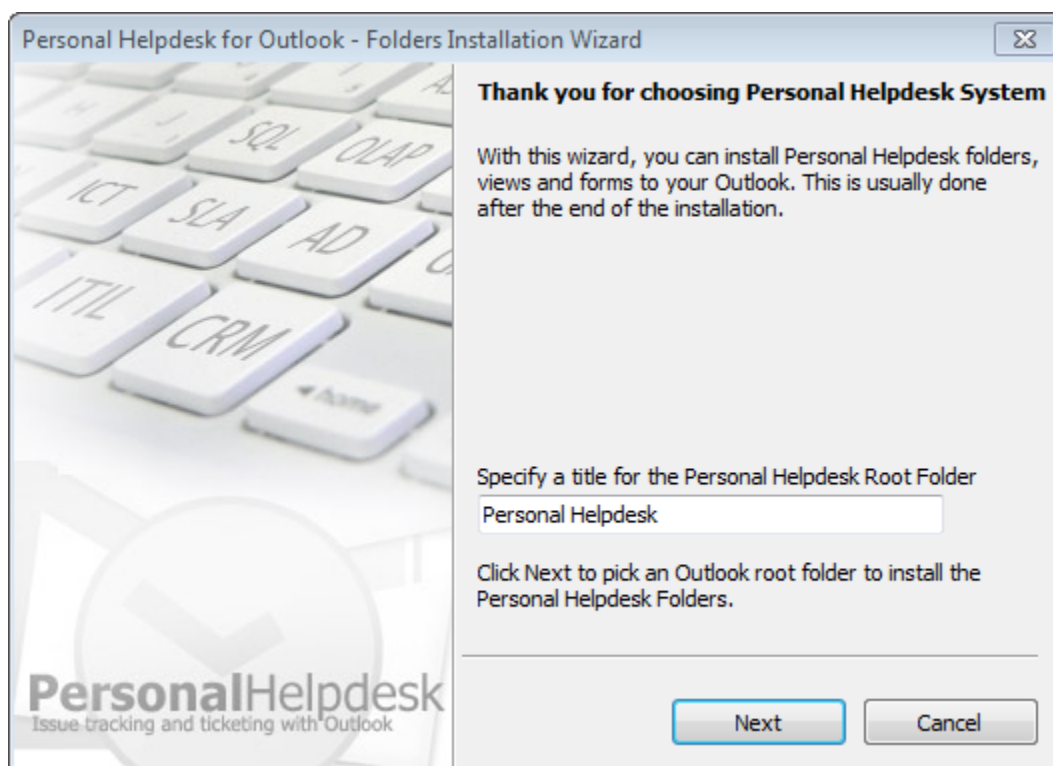
**Use Existing Personal Helpdesk folders** - Click this button to use existing Personal Helpdesk folders (*i.e., Ongoing Cases, Resolved Cases, KB, Schedules and History*) which had been already configured earlier.

You will be given the option to select the existing 'Ongoing Cases' Personal Helpdesk subfolder.

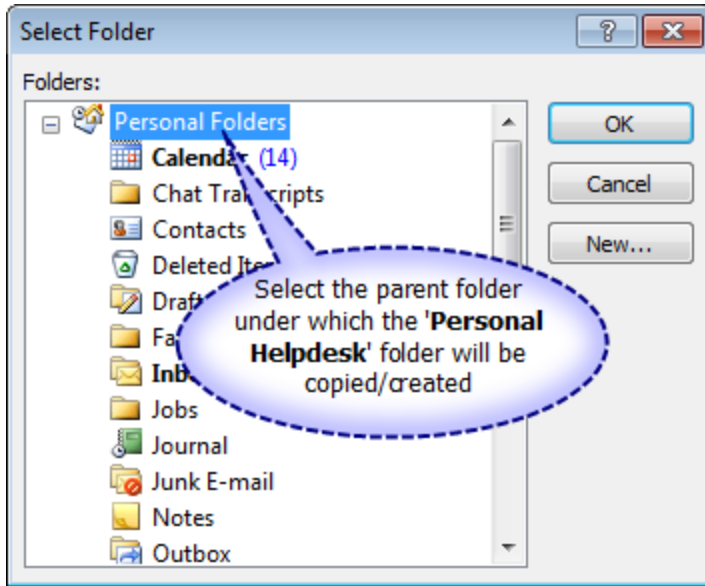


Either you can auto scan (a) to search for the first available 'Ongoing Cases' subfolder. If you already know the location of the existing Personal Helpdesk folders, you can simply click the 'Browse' (b) button to specify the 'Ongoing Cases' subfolder from your Outlook. Once you have selected the path to the Ongoing Cases subfolder, click 'Continue'. Steps 8 and 9 would be not applicable, with this route.

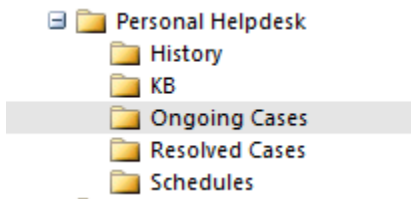
**Step 8.** A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent Personal Helpdesk folder that will be created. By default, it has a title of 'Personal Helpdesk'.



**Step 9.** Clicking 'Next' button would enable you to select an Outlook parent folder where the specified Personal Helpdesk root folder would be created. If Microsoft Outlook is not already opened, it would be started automatically.



The tool would then copy Personal Helpdesk subfolders, forms & designs, views etc. from the Personal Helpdesk PST template file (PersonalHelpdeskPST.pst). It would look like the followings layout:



The screenshot below lists all the files that are installed on the system.

