

Installation – SupportCalls Manager and Client

With Version 4, SupportCalls System is available in two set up media – **managerial** and **client** install. The managerial install is for helpdesk administrator who would configure and maintain the SupportCalls folders, drop down lists, templates, FAQs and other helpdesk settings. Whereas, the client install is for the technicians to enable them to work on support cases in Outlook with the configured SupportCalls folders.

(Note: if the administrator needs to work on support cases, then the client tool also needs to be installed, apart from the managerial portion).

Download link: <http://www.assistmyteam.net/SupportCalls/download.asp>

The downloaded zip file (SupportCallsSetups.zip) contains 3 files – *SupportCallsManagerSetup.exe*, *SupportCallsClientSetup.exe* and *VersionInfo.txt*. Extract these file contents to a file folder.

SupportCallsManagerSetup.exe – As the name implies, this install is meant for the helpdesk manager/administrator to configure and maintain the SupportCalls settings data. This tool also enables the administrator to automate support cases creation and also process support requests coming from the Caller/Technician Web Access websites.

SupportCallsClientSetup.exe – This install is meant for technicians who would be working on support cases in the configured Outlook folders. Before you install the client tool, make sure the SupportCalls 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 eg. \\All Public Folders\Public folders\SupportCalls\Ongoing Cases). This is required because you will be asked to specify the configured SupportCalls ‘Ongoing Cases’ subfolder once you start Outlook (for the purpose of linking up the client tool with the SupportCalls outlook folders and is required one time only).

VersionInfo.txt – This text file contains the current version of the SupportCalls Client. This file is used for enabling automatic upgrade of the client tool (if enabled by the helpdesk administrator).

It is recommended that you place the client setup files (SupportCallsClientSetup.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.

Follow the subsequent pages for detail information on installing Managerial and Client portion of SupportCalls System.

[Managerial Installation & Configuration](#)

[Client Installation](#)

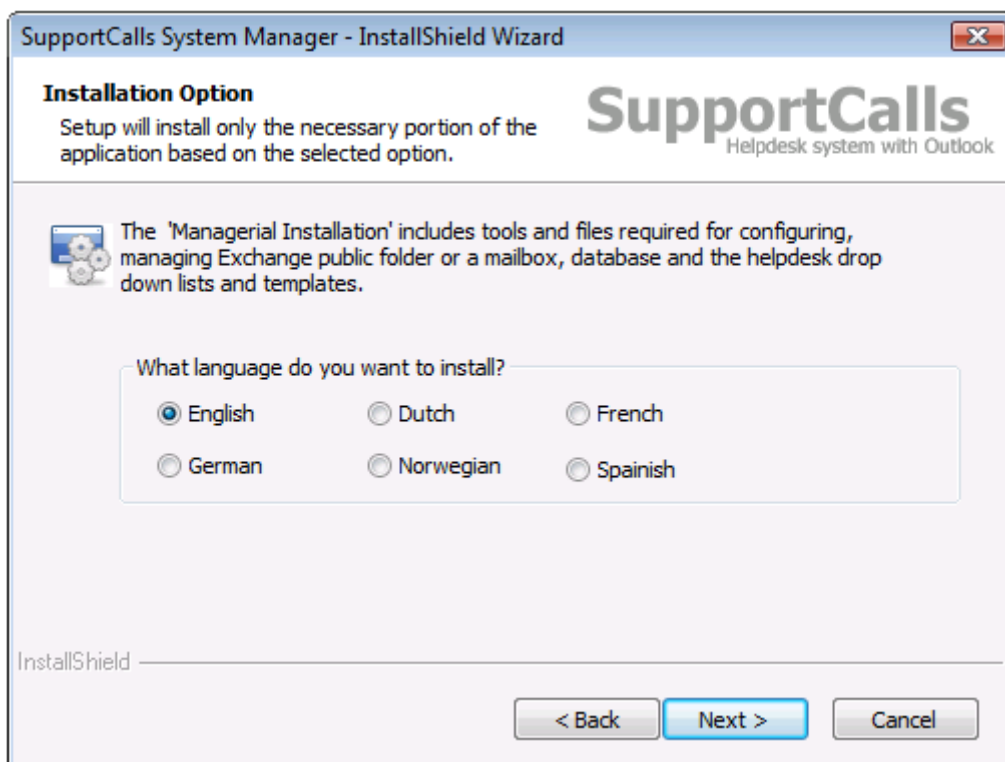
1. Managerial Installation & Configuration

The managerial installation consists of server tools and files, for creating the SupportCalls Outlook folders, and for configuring and maintaining the settings of the helpdesk. It has to be performed by the helpdesk administrator/manager before the client tool is installed on every technician's system.

Step 1. Run the *SupportCallsManagerSetup.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 SupportCalls 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).

SupportCalls System Manager - InstallShield Wizard

Customer Information
Please enter your information.

SupportCalls
Helpdesk system 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

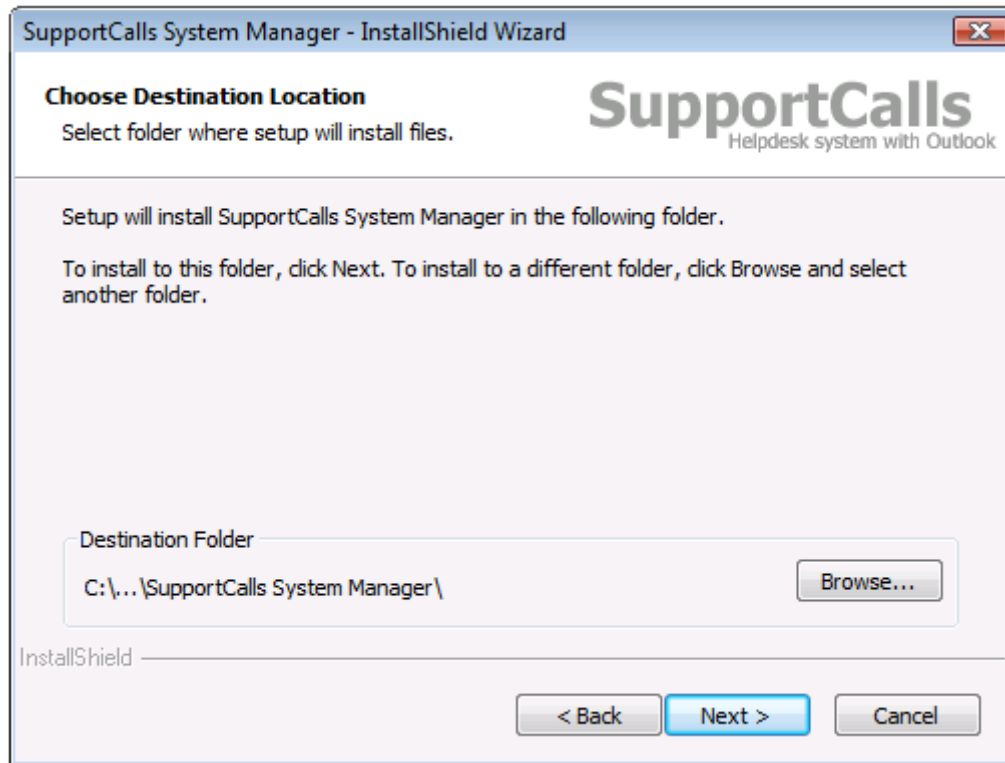
1

– 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\SupportCalls System Manager).

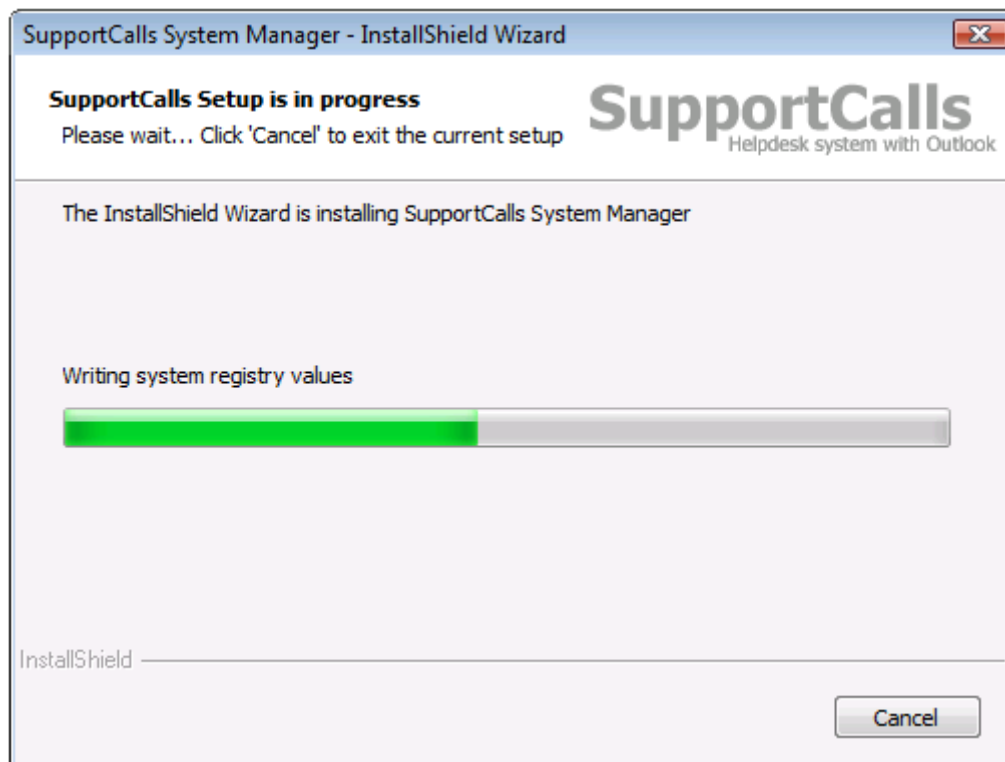
2

– 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 (eg. C:\Documents and Settings\Username\Application Data\AssistMyTeam\SupportCalls System Manager). 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.

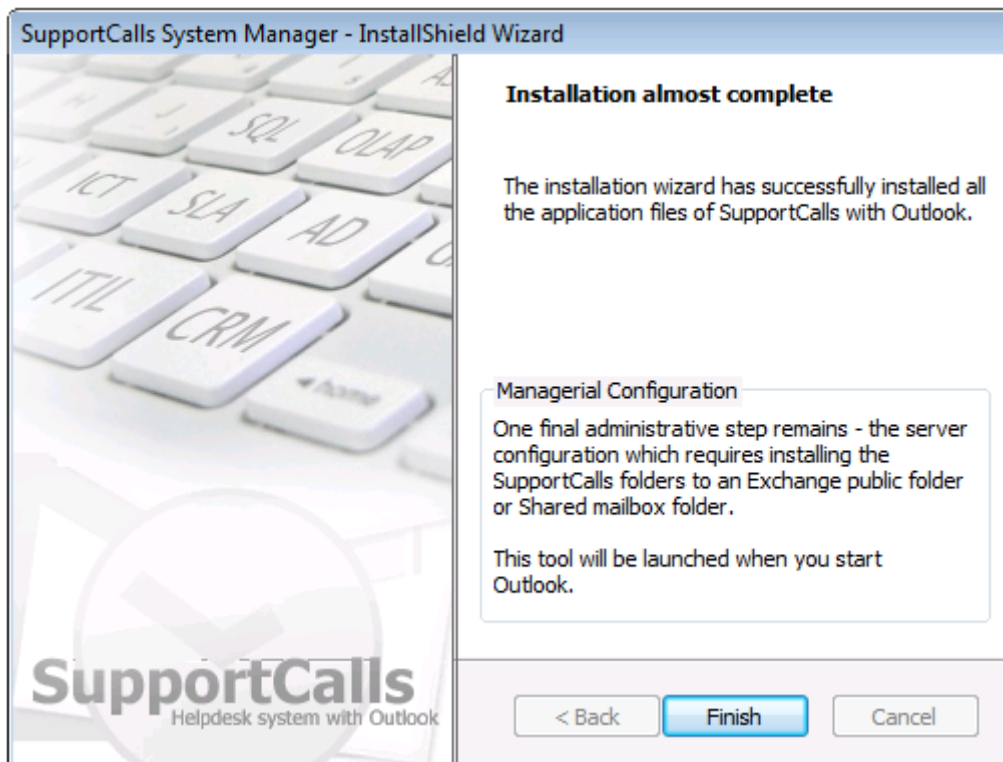
Step 4. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)



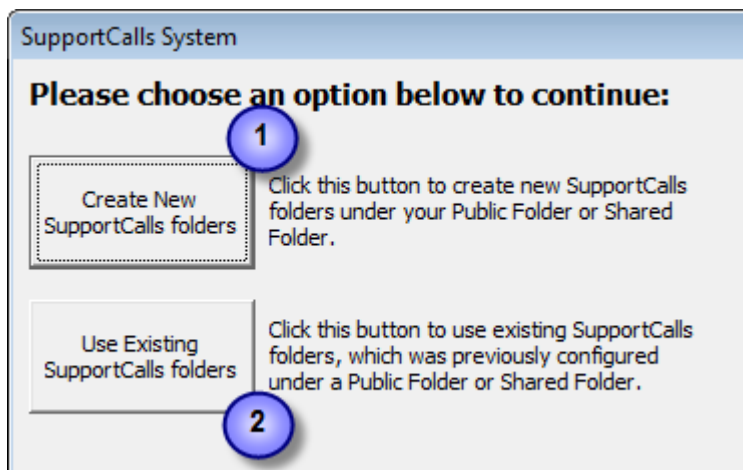
Step 5. Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process



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:

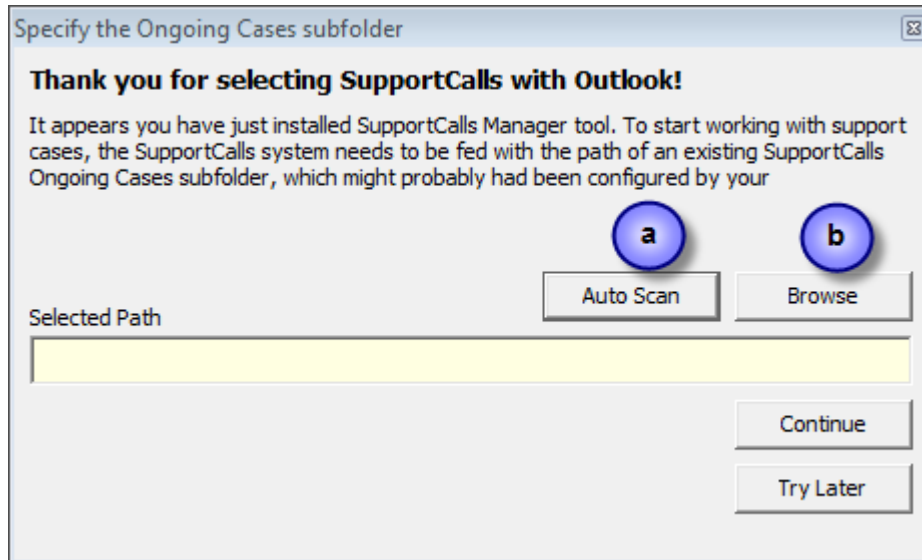


1 Create New SupportCalls folders – Click this button to create new SupportCalls folders (*i.e.*, *Ongoing Cases*, *Resolved Cases*, *KB*, *Schedules*, *History and Settings*) which are customized with SupportCalls specific fields, views and forms. Follow **step 8** to further go ahead with the configuration.

2 Use Existing SupportCalls folders – Click this button to use existing SupportCalls 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 SupportCalls Manager.

You will be given the option to select the existing 'Ongoing Cases' SupportCalls subfolder, to

link up the SupportCalls Manager with the existing SupportCalls folders and database.



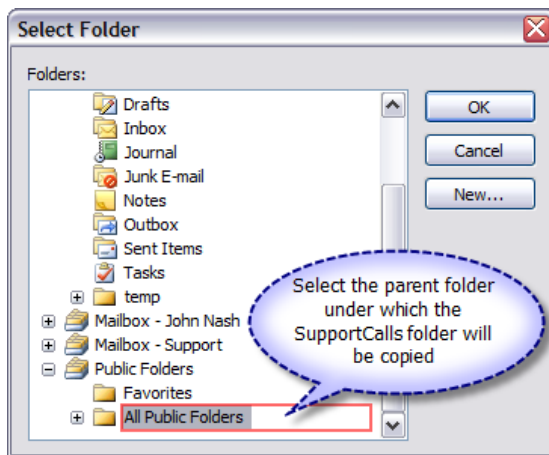
Either you can auto scan (a) to search for the first available 'Ongoing Cases' subfolder. If you already know the location of the existing SupportCalls folders, you can simply click the 'Browse' (b) button to specify the 'Ongoing Cases' subfolder from your Outlook. Once you have selected the path to 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 SupportCalls folder that will be created. By default, it has a title of 'SupportCalls'.

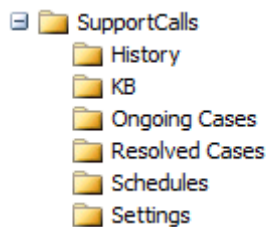


Step 8. Clicking 'Next' button would enable you to select an Outlook parent folder where the specified

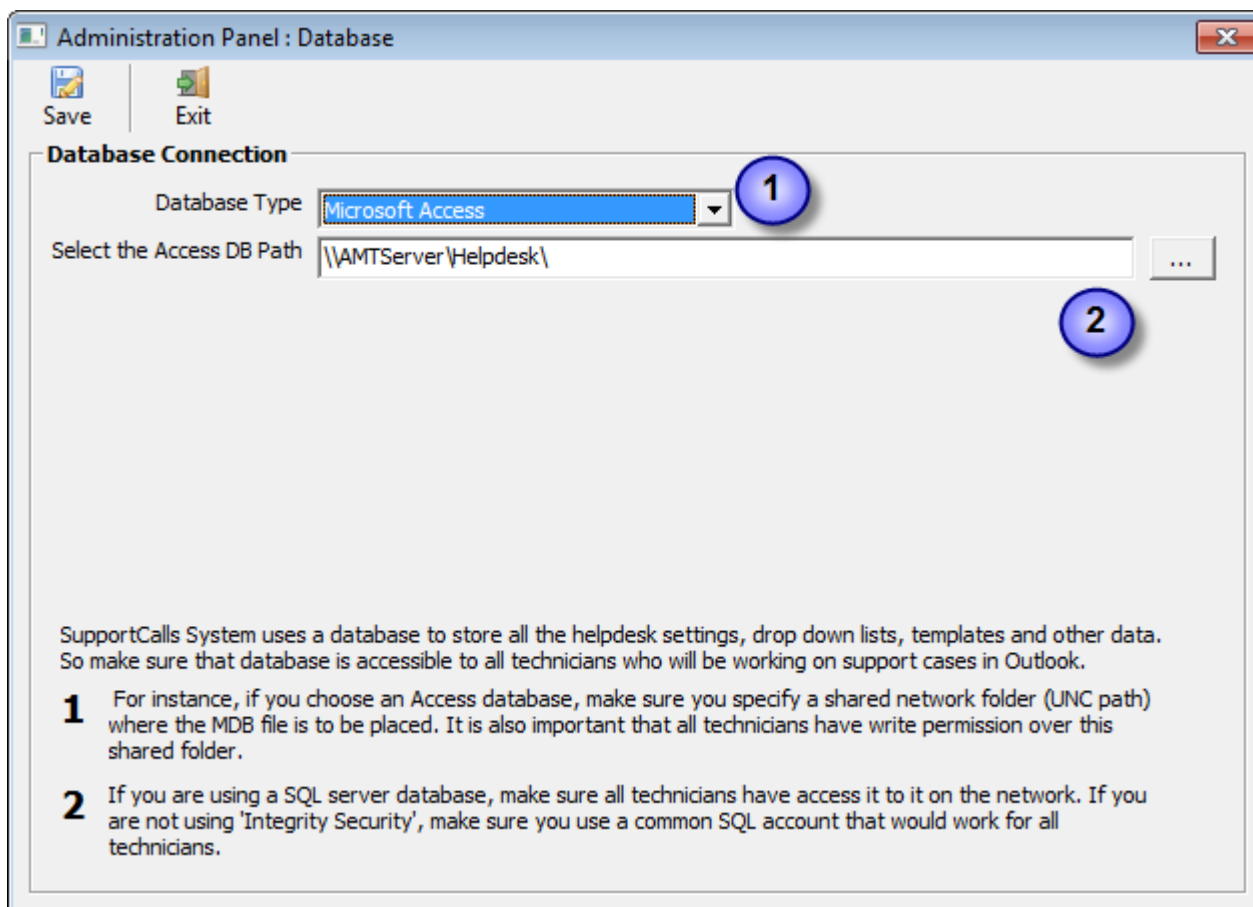
SupportCalls root folder would be created. If Microsoft Outlook is not already opened, it would be started automatically.



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



Step 9. Now, the final step is to create a SupportCalls database where all the settings, templates and other helpdesk data will be saved. Both Microsoft Access and SQL Server databases are supported.



If you choose Access, the database will need to 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 (eg.

\\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 SupportCalls Cases folders in Outlook.

Another database option is the SQL server. This is a recommended option, if you have a large number of users/technicians working on support cases, as it gives a better performance.

For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name '*SupportCallsSettingsDB*' 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 SupportCalls Client, 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.

Managerial Configurations

Now that you have installed – SupportCalls files into your system and SupportCalls folders into your public folder or mailbox, you as a helpdesk manager, would need to configure the permission level of each SupportCalls 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 SupportCalls folders would not be able to perform most of the helpdesk tasks such as creating new support cases, working on their assigned cases etc.

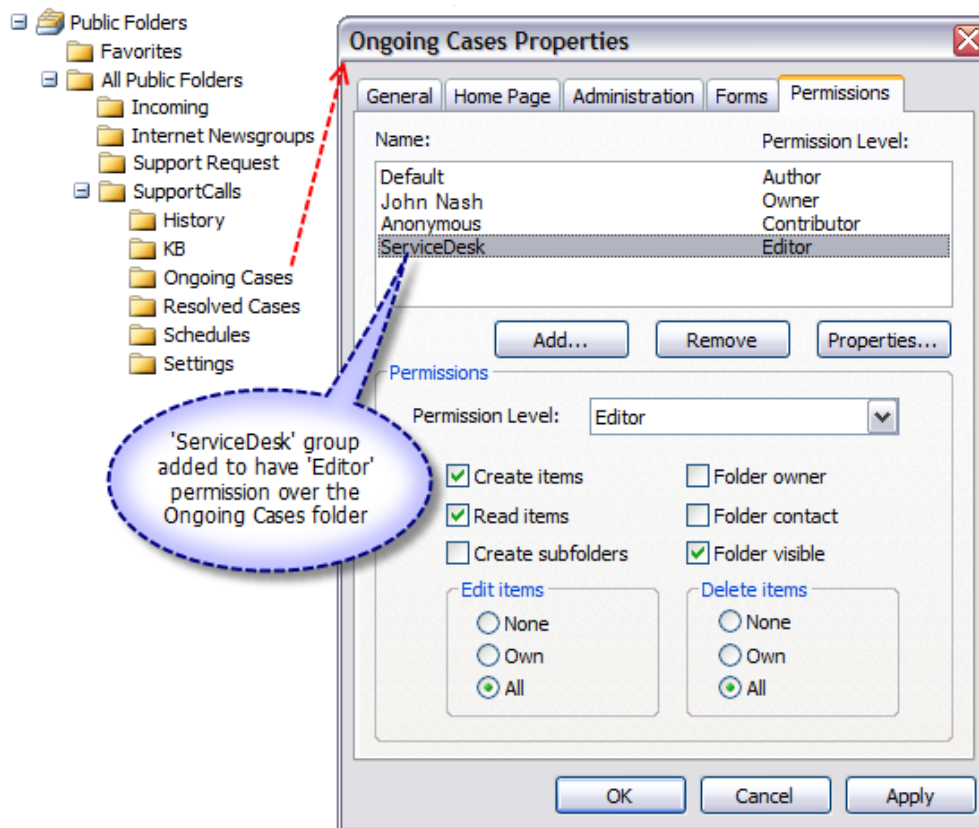
The following table summarizes what permission levels are required on each folder:

Folder	Permission
History	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 ' Publishing Editor ' permission to technicians with admin-access*

Settings	At least 'Editor' permission to all helpdesk technicians
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*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 users group consisting of all 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.



The screenshot below lists all the files that are installed on the system. Notice, that, there are additional files which forms the managerial option pack – tools to configure and insall a new SupportCalls folder, which has to be performed only by the helpdesk administrator/manager.

ConfigureServerPST	6/25/2010 11:33 AM	692 kB
CustomerWebService	10/14/2009 10:04 ...	1,185 kB
OLAPSenseLite	3/24/2010 4:33 PM	235 kB
RadarSoft.Common.dll	6/11/2009 5:13 PM	1,254 kB
RadarSoft.CommonChart.dll	6/11/2009 5:14 PM	461 kB
RadarSoft.WinForms.Desktop.dll	6/11/2009 5:14 PM	860 kB
RadarSoft.WinForms.dll	6/11/2009 5:16 PM	2,118 kB
RadarSoft.WinForms.Grid.dll	6/11/2009 5:16 PM	445 kB
RadarSoft.WinForms.GridChart.dll	6/11/2009 5:16 PM	636 kB
SupportCallsHelp	3/18/2009 12:58 PM	11,403 kB
SupportCallsManager.dll	6/25/2010 10:30 PM	3,648 kB
SupportCallsProcess	6/25/2010 8:03 PM	1,920 kB
TechnicianWebAccess	6/29/2009 3:25 PM	1,183 kB

