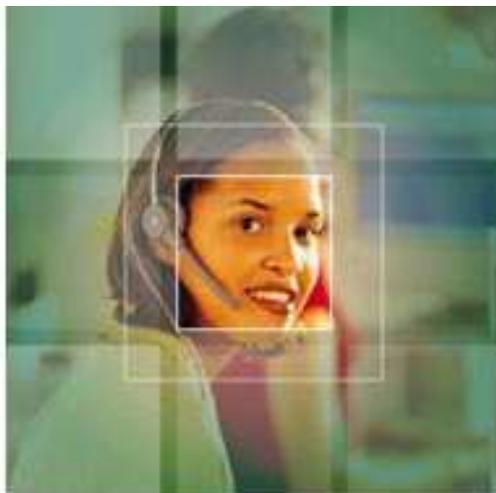


Total Support HelpDesk 2018 Quick Start Guide



**Note: This is for FIRST TIME INSTALLATIONS, NOT UPGRADES
Please READ through first before you begin**

There are three main components of Installing Total Support HelpDesk.

| | |
|---------------------------------|---------------------------|
| The “Server files Installation” | (required one time only) |
| The “Client files Installation” | (per desired workstation) |
| The “Configuration Program” | (global settings) |

The “**Server Installation**” will 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 windows workstation that you actually wish to run the HelpDesk program. This can also include the server itself if you wish. If you are connecting to Act!, you must have Act! client PRO or PREMIUM non-web client installed and running before you install HelpDesk Client.

The “**Configuration Program**” must be run at least once for the minimum startup to select the HelpDesk contact manager of choice (Act! or Stand Alone) and setup up Users unless you use the default user ADMIN (no password). It can also be run as often as required, either externally or from within the HelpDesk program. Must have User with ‘supervisor’ rights to access Configuration from inside HelpDesk.

Full documentation was installed and saved to the HelpDesk \server\documentation folder.
TIP: For Optional and Advanced Features, do not enable features until you fully understand their function. If you enable a feature and do not complete the configuration, this will cause issues within the application.

Installing Total Support HelpDesk

You should have received an email with a link to download the installer.
File name would be: TSHD2018_TRIAL.exe

Everyone starts with the trial and once purchased, we change out the license file for a permanent license.

Server Installation

Total Support HelpDesk 2018 must be installed on a computer that will be available to all workstations on the network and where users will access and run the HelpDesk program. During the server installation, you must have “**administrative rights**” on the server machine.

Run the program "TSHD2018_TRIAL.exe". 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.

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.

Our installation will select a default location based on our O/S, however you can change as desired, but remember. **DO NOT INSTALL INTO THE \PROGRAM DATA folder**. Some operating systems will automatically force installation to this folder. Please change the folder.

Last step is to set the **Share and Security** settings on the main HelpDesk directory:
Sharing (will vary on your O/S) – everyone needs full access to HelpDesk directory.
Security – all users and groups listed must have full control to HelpDesk5 directory.

That completes the Server Installation.

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! or the built in Stand Alone contact manager. The program allows you to configure many options about your HelpDesk installation, but one of the things you **must** do is configure your contact manager connection.

How to run HDConfig5.exe

If you are on the "Server" where you installed HelpDesk, locate the HDTools shortcut. Open and select the 2nd option Run Total Support HelpDesk 2018 5.0 Configuration. Follow on screen prompts regarding selecting your contact manager.

Your initial User ID is "ADMIN" (no quotes) and the password is blank.

Click on the top button labeled "**Contact Manager**".

Click on the top button labeled "Launch Contact Manager Connection Settings Wizard"

Select your Contact Manager. Act! Users, please select the proper version of your Act! so the proper links are configured. Click next.

If you select Stand Alone, click next. There is no further contact manager configuration required at this time.

If Act! you will need to complete a few more screen to connect your Act! database to HelpDesk.

The Path to Act! database: *Please use the BROWSE option and go through the Network neighborhood so the path is UNC format (no drive letter or ip address)*

Example: \\ServerName\ACT\MyACT.PAD

TIP: HelpDesk does NOT support ACT! local database with data sync

Enter a valid Act! User Name and Password for this Act! database and click the verify button. If HelpDesk can log into Act! using the logon credentials you entered, you next screen will display **Login Successful** and the SAVE button displayed. If unable to logon, the save button will be grayed out and Login Failed will display. Use the back button to verify the path to the .PAD file and the logon information.

For now, this is all the basic configuration required to get up and running.

If you want to setup Users now, see Chapter 5 of the ADMIN guide, Users and Departments.

Client Installation

Install ALL clients as an “Admin” user.

Act! Users, remember you must have Act! already installed and running before you install the HelpDesk client.

If you want to install a client on the same machine as the one where you installed the server, you can install the HelpDesk client from the HDTOOLS menu. Find the “HDTools” icon on your desktop, double click on it, and run the first option, “Run Total Support HelpDesk 2018 Client”. Or browse to the HelpDesk \Server\Installers folder and select the TSHD5Client_Install.exe

Tip: The HDTools is the quickest way to get where you need to go in HelpDesk

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. You can install client workstations at any time on any workstation that has full access to the HelpDesk directory.

To install a client, open windows explorer and type the UNC address or browse using network neighborhood to the folder and find the client installation program.

It might be something like the following:

[\\ServerName\HelpDesk\Server\Installers\HD5Client_Install.exe](#)

(this is a UNC path and what is used by HelpDesk to communicate)

Start the program by right-clicking on the file **HD5Client_Install.exe and RunAs ADMIN** (first time only). Follow the wizard to complete the client installation.

This will install local program files required by helpdesk. Repeat steps to install on other workstations.

Starting HelpDesk client for the first time

Locate the desktop icon and right click, run as Administrator. This is recommended the first time you launch the client to ensure all the registry keys are properly accessed.

If this is an evaluation, you will have three buttons, Try It – Cancel – Buy It. Click on Try It. If purchased and activated, you will go straight to the logon screen.

From the Try It button you will be taken to a logon screen. For the user ID the default is ADMIN and no password. Click Login.

Once logged on, you will see one of the following sets of queues

If Stand Alone, default view you should see 3 tab queues

Contacts (this is where you will add/edit/manage your contacts)

Current (this is where all the open inquiries are displayed)

History (this is where all the finished inquiries are displayed)

If Act! you will see only the Current and History tab queues since your contacts already exist in your contact manager.

For full instructions on using HelpDesk, please see the USERS guide. From the Help menu in HelpDesk, select USERS GUIDE or browse to HelpDesk \server\documentation folder.

Would you like visual instructions? We provide FREE Training/How To presentations that will walk you through configuration. You will also find helpful items under our Quick Links section. Visit our support portal web site:

<http://www.resource-dynamics.com/support/supportportal.asp>