
PRD HelpMaster v11

Evaluation Installation and Quick Start guide

July 2011



Contents

Thank you for evaluating HelpMaster!.....	3
About this guide	3
Get help!	4
On-line community support.....	4
Telephone and email	4
Local resellers.....	4
Downloading and Installing	5
Installation overview	5
Technical requirements.....	6
Installation Frequently Asked Questions.....	7
Evaluation Frequently Asked Questions.....	9
Installing HelpMaster + Microsoft SQL Server on a single machine.....	10
Creating the HelpMaster database	16
Sample database or blank database?	16
Create your database	16
HelpMaster Desktop.....	19
Configuring other HelpMaster modules.....	20
Using HelpMaster in a networked, live setting.....	20
Get involved!.....	20

Thank you for evaluating HelpMaster!

HelpMaster is the most flexible, template driven helpdesk software on the market, and PRD Software is very excited to offer the latest version v11.

HelpMaster will transform the way you do business.

It can be used for

- IT Helpdesk
- Complaints management
- Software development change control and bug tracking
- Facilities management
- Human Resource Management
- and so much more

About this guide

This guide is a simplified overview of the installation and initial configuration of HelpMaster. It has been designed to get you up and running with your HelpMaster download as soon as possible.

For in-depth installation and configuration help, please refer to the HelpMaster helpfile. This is installed with the product, and is also available as a download from

<http://www.helpmasterpro.com/support/updates-and-service-packs.aspx>

An up-to-date on-line version of the HelpMaster helpfile is also available here

http://www.helpmasterpro.com/helpfile/hh_start.htm#Desktop/html%20files/HelpMaster%20Pro%20start%20page.htm

Get help!

PRD Software is here to help. If you require any technical assistance during the installation and evaluation period, please contact us, or tap into the world-wide HelpMaster community on-line.

On-line community support

HelpMaster on-line community home

<http://www.helpmasterpro.com/community.aspx>

HelpMaster on-line discussion board

<http://www.helpmasterpro.com/community/discussion-board.aspx>

Telephone and email

PRD software technical support telephone : +61 2 62784664

PRD software technical support email : support@prd-software.com.au

Local resellers

Worldwide HelpMaster resellers : <http://www.helpmasterpro.com/company/global-partners-and-resellers.aspx>

Downloading and Installing

Once you have downloaded HelpMaster, save the .exe file to a location on your hard-drive.

Evaluation downloads can always be downloaded from <http://www.helpmasterpro.com/evaluation-download.aspx>

Installation overview

Installing and configuring HelpMaster is a relatively easy task. Here are the basic steps.

1



Install HelpMaster. Check the “Install SQL Server” checkbox if you don’t already have a SQL instance you can use.

2



Create a HelpMaster database using the HelpMaster Database and Reports Wizard if you did not already check the “Install SQL Server” during the installation.

3



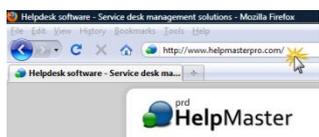
Run the Desktop edition, and logon to HelpMaster

4



Explore the product as you like, or work through the “Quick start guide”. You find the Quick Start guide as a section within the HelpMaster helpfile. The quick start guide will help you configure HelpMaster ready for use.

5



Go on-line to discuss and learn more about HelpMaster. www.helpmasterpro.com

Technical requirements

Please ensure that your computer meets the following technical requirements before attempting to install HelpMaster.

- HelpMaster will work on Windows XP, Vista, Windows 7, Windows Server 2003 and Windows Server 2008
- HelpMaster requires the Microsoft .NET 3.5 framework installed
- HelpMaster uses a Microsoft SQL Server 2005/2008, or SQL Server Express database.
- HelpMaster Web requires Microsoft Internet Information Server

For full technical requirements, please refer to <http://www.helpmasterpro.com/products/system-requirements.aspx>

HelpMaster is Windows 7 Certified



Installation Frequently Asked Questions

Where should I install?

For evaluating HelpMaster, it is recommended that you install everything on just one machine. This will make the installation and configuration easier and allow you to concentrate on your evaluation.

What is Microsoft SQL Server?

Microsoft SQL Server is a database platform. HelpMaster uses this type of database to store information. See www.microsoft.com/sql for further details.

Do I need to install Microsoft SQL Server first?

HelpMaster will require a SQL Server instance to host its database. If you do not currently have any SQL Server instances installed that you can use, then yes, you will need to install SQL Server first. This can be done via the HelpMaster installer. Just check the “Install SQL Server” checkbox. See installation steps later in the documents.

Where do I get Microsoft SQL Server from?

The HelpMaster installation can install SQL Server Express 2008 for you. Just check the “Install SQL Server” checkbox. You can also download SQL Server from Microsoft. See www.microsoft.com/sql for further details.

I already have Microsoft SQL Server installed on my machine or network!

If it's SQL Server 2005, or 2008, then you can use this instance if you like. In this case, don't check the “Install SQL Server” checkbox during the installation. After the installation has completed, use the Database and Reports Wizard to create your HelpMaster database against your existing SQL Server instance. See below for further details about this.

If I use Microsoft SQL Server express for the evaluation, can I then upgrade to the full version of SQL Server and keep my data?

Yes. All you need to do is make a backup of your database, and then restore it on your new database instance. That's it!

Do I need specific SQL Server database permissions to run HelpMaster?

Yes. Database security and permissions is an important part of any application that connects to a SQL Server database. Basically, you need to use an account (Either a Windows account, or a SQL Server account) that can read, write, create, view, and drop database tables and objects. If you choose to install SQL Server as part of the HelpMaster installation process, the user account that is logged onto Windows at the time of installation will automatically be added as an SQL Server administrator. This account will have full administrative control over the “HelpMaster” SQL Server instance that is created.

For further information about the required permissions, please refer to Appendix A at the end of this document.

Evaluation Frequently Asked Questions

What are the evaluation terms and restrictions?

There is no time limit – evaluate as long as you wish. The only restriction is that you will be limited to logging 200 jobs only.

Can I extend my evaluation?

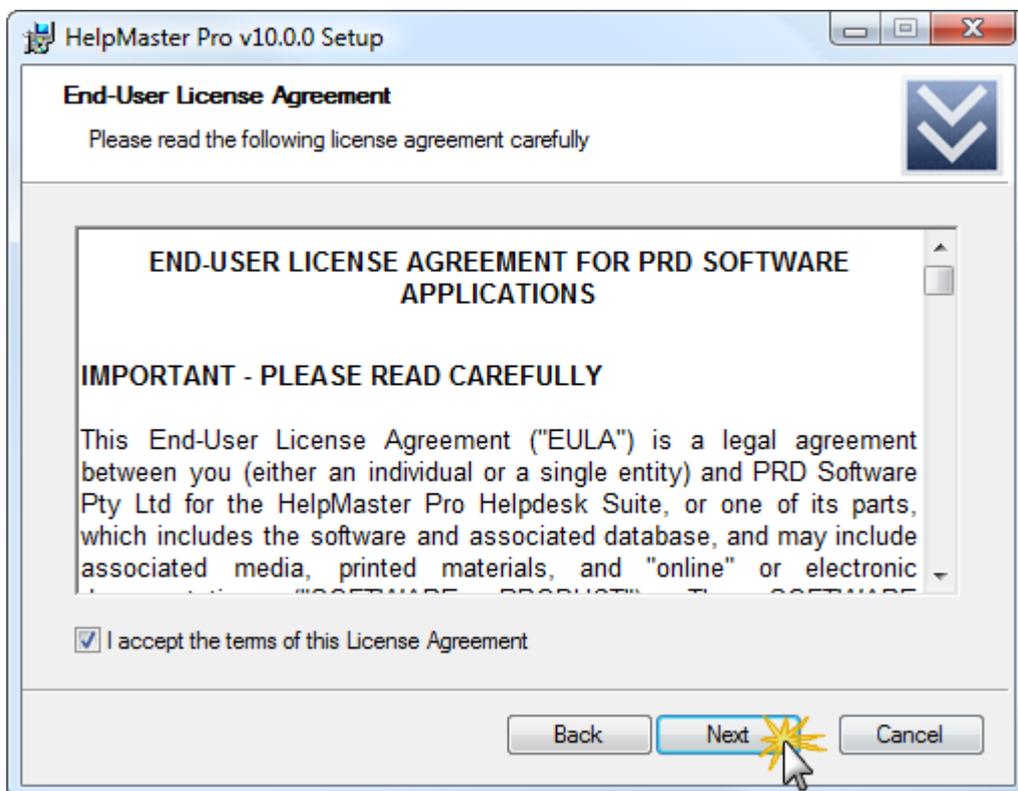
Yes. If you need further evaluation help, or the 200 job limit extended, please contact PRD Software and we'll be happy to give you a registration code that will meet your evaluation needs.

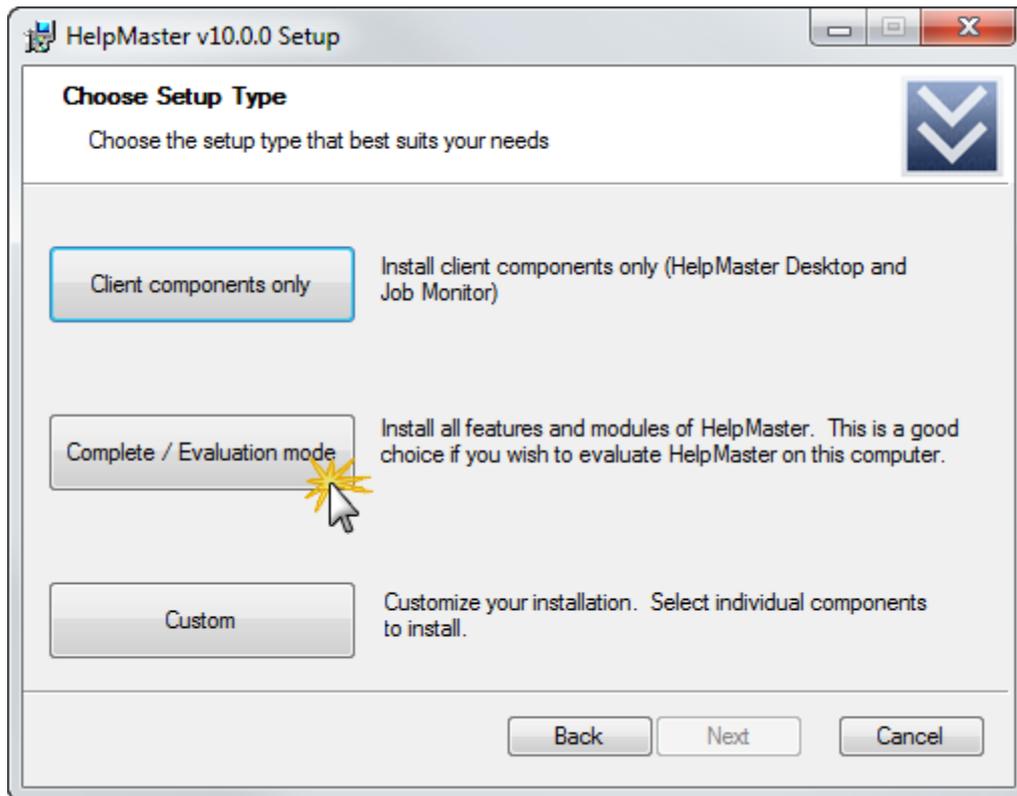
Can I keep any data I create and configure during the evaluation process and move it into a live environment should we purchase HelpMaster?

Yes. All data is stored in your Microsoft SQL Server database. If you purchase HelpMaster, you simply register the database of your choice and then start using that for your live environment.

Installing HelpMaster + Microsoft SQL Server on a single machine

Run the HelpMaster installation .exe and follow the on-screen prompts.

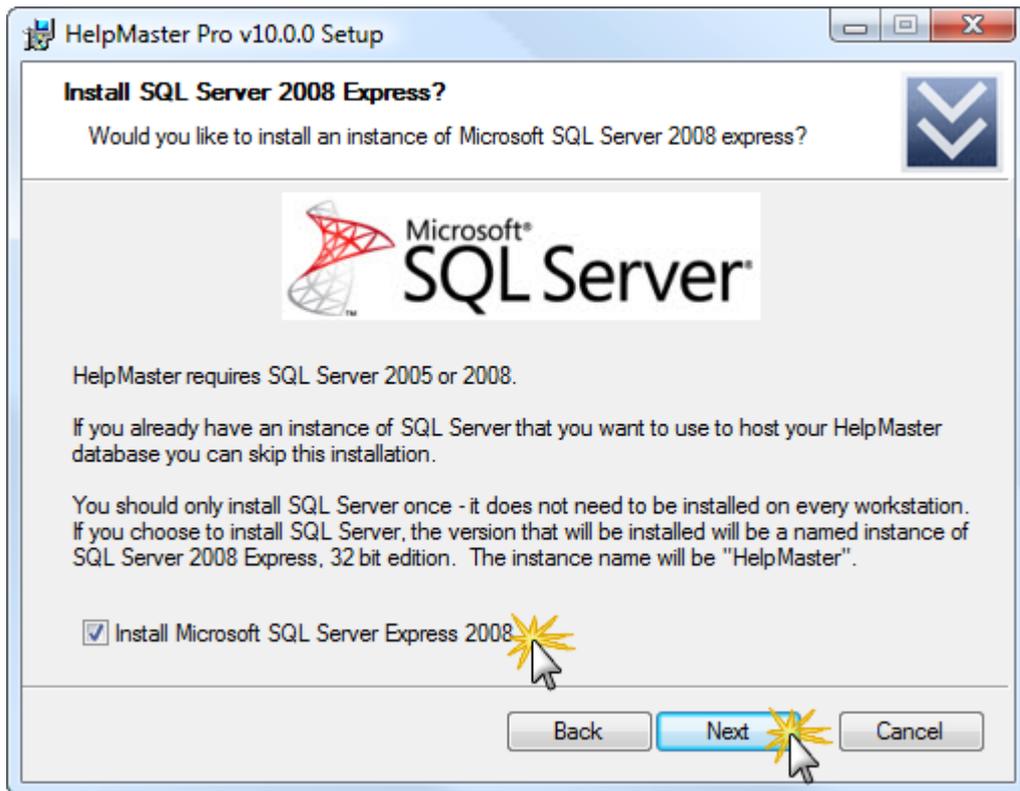




If you are evaluating HelpMaster, it is recommended that you click the **“Complete / Evaluation mode”** button. This will install all components of the software. If you would like to choose which components to install, click the **“Custom”** button instead.

In a live, production environment of HelpMaster, it is usual to install various components on different machines. For example, the web components on your web server (a machine running Microsoft IIS), the database on a database server (Microsoft SQL Server), the automation services on another machine and the client components on each workstation.

For the purposes of evaluation, you will find it much easier for now just to install everything on the one machine. This will give you the easiest installation and configuration options.

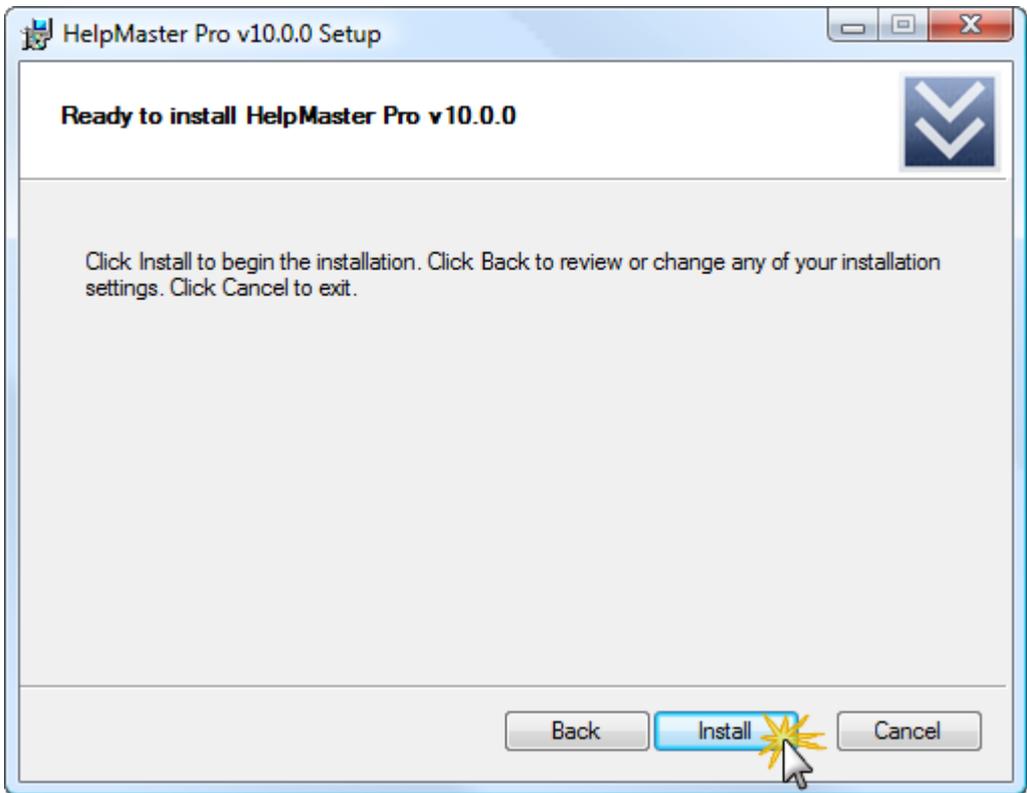
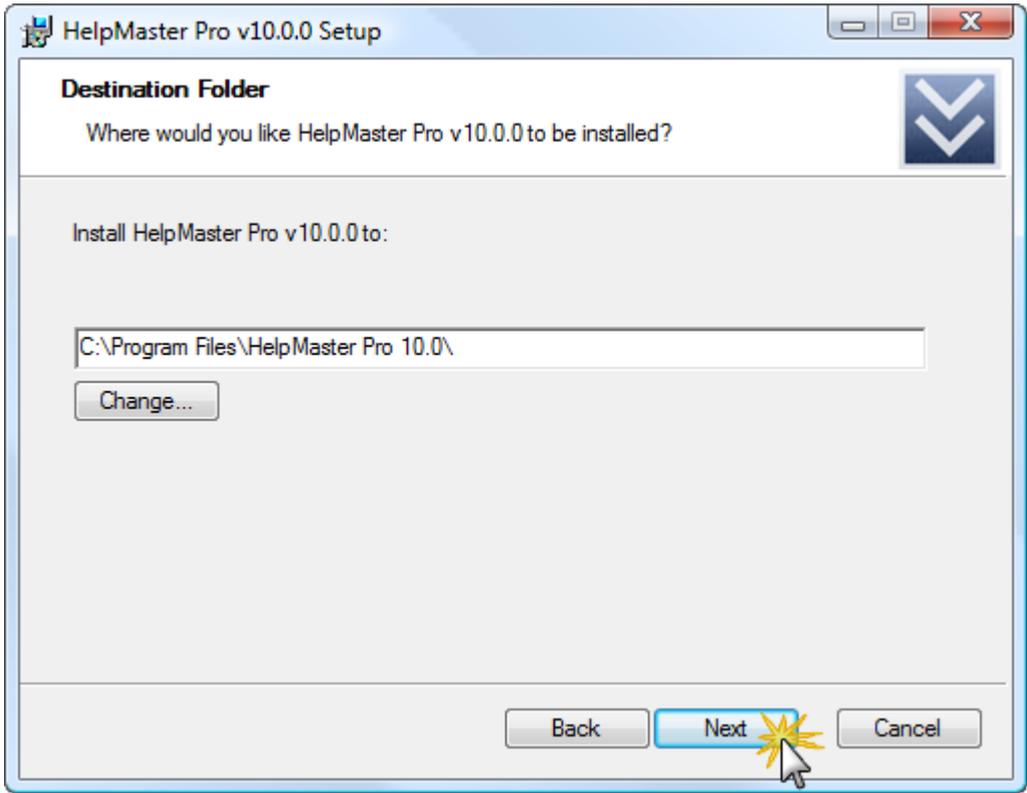


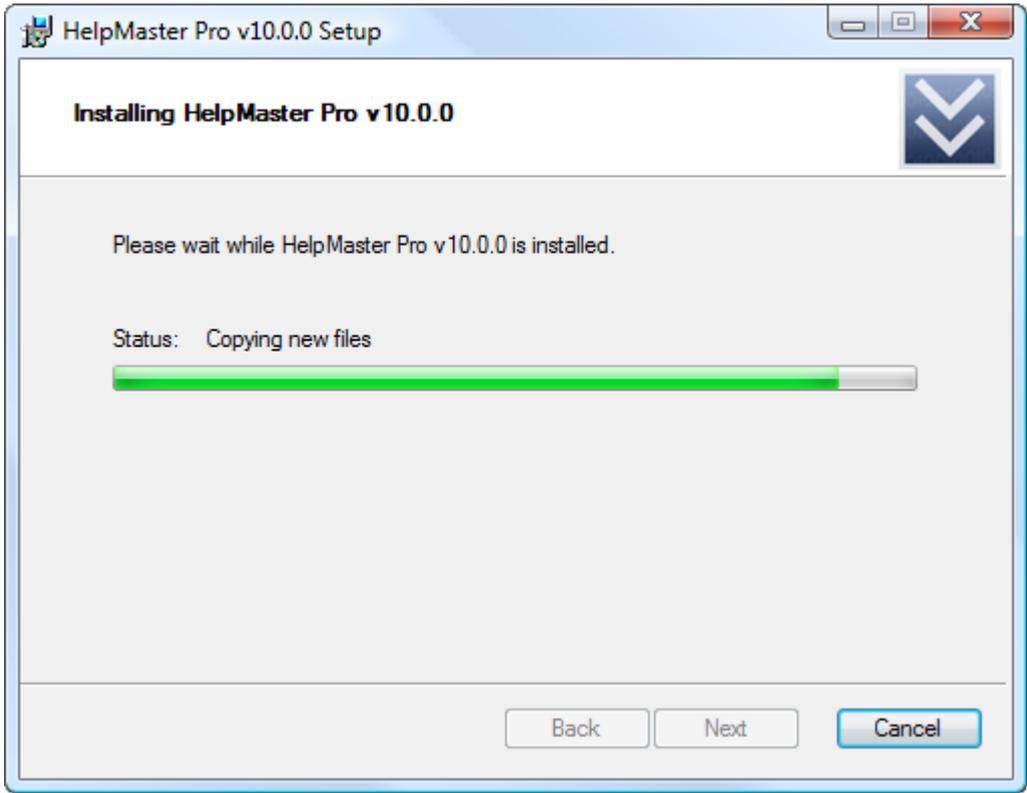
For an evaluation of HelpMaster, it is strongly recommended that you check the “**Install Microsoft SQL Server Express 2008**” checkbox. This will install a specially prepared “HelpMaster” instance of SQL Server that you can use for your evaluation purposes.

Even if you already have an instance of SQL Server elsewhere on your network, or even SQL Server already installed on your local machine, you can still check this checkbox. This will install a special instance of SQL Server called “HelpMaster”. This instance will be configured to have the necessary security, collation and other settings that are required for HelpMaster operation.

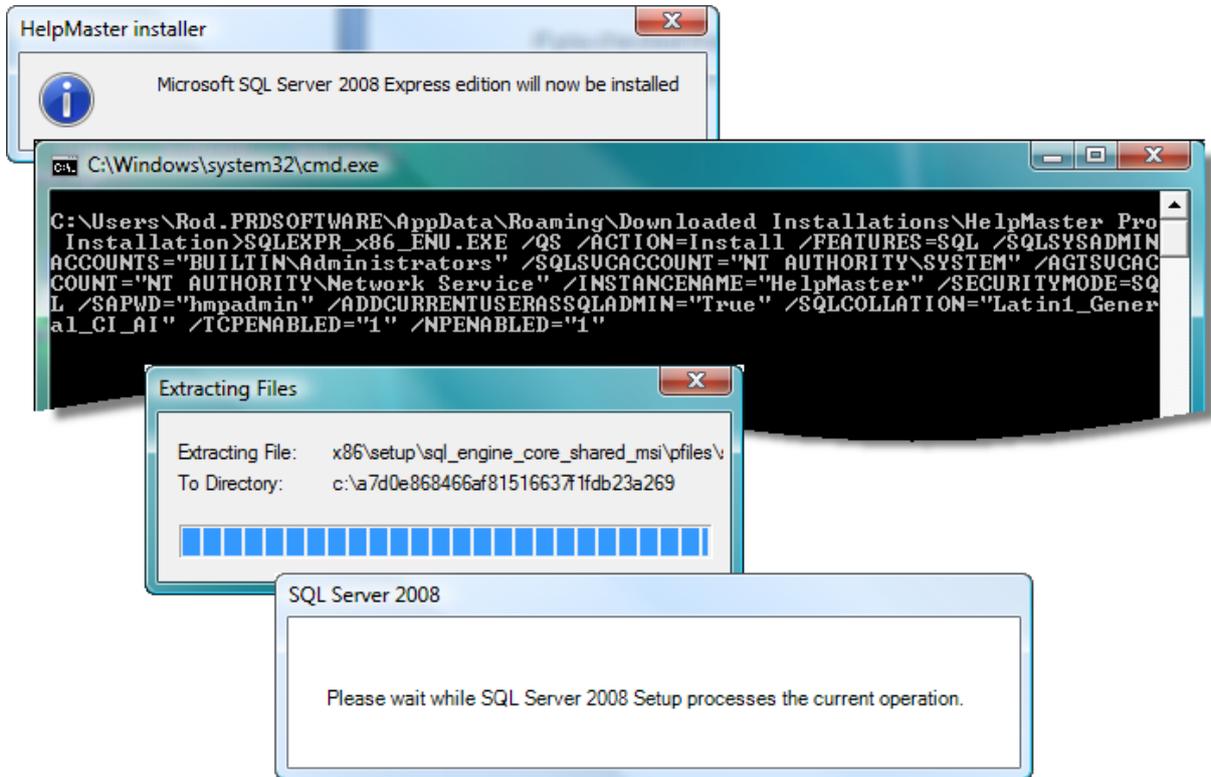
You can always move your database to another SQL Server instance in the future if you wish to do so.

For further information about Microsoft SQL Server, please refer to www.microsoft.com/sql



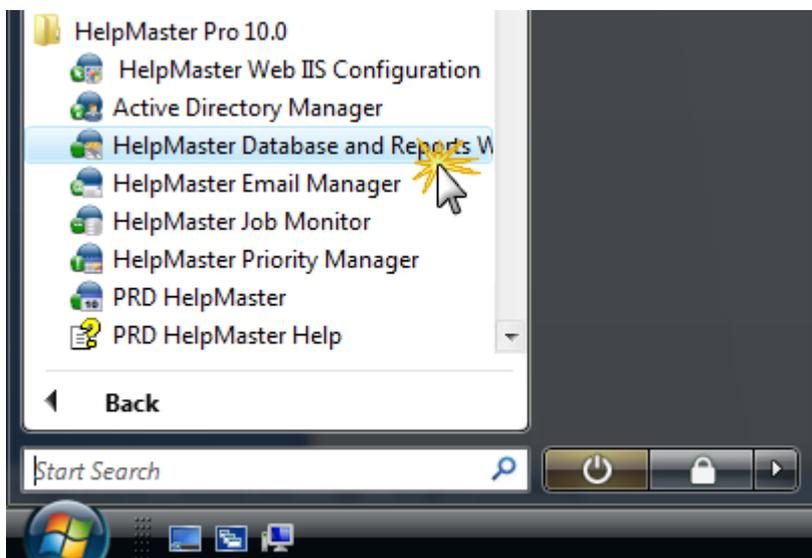


If you checked the “Install Microsoft SQL Server Express 2008” checkbox, SQL Server will be installed after you click “Finish”. Please do not cancel this installation. Depending on your system, you may need to reboot your system to complete the installation.



During this step, SQL Server will be installed and 2 HelpMaster databases will be created for you. One database will be a blank, ready to build database, the other will be a sample database that contains evaluation data that will help you explore every feature of HelpMaster.

Once the physical installation has completed, you’ll see the HelpMaster product shortcuts in the start menu.



Creating the HelpMaster database

If you checked the “Install SQL Server” checkbox during the installation process, you can skip this part, as the databases will already have been made for you.

The first thing you should do after installing HelpMaster is to create a SQL Server database that HelpMaster will use. This is easily done by using the HelpMaster Database and Reports Wizard.

Sample database or blank database?

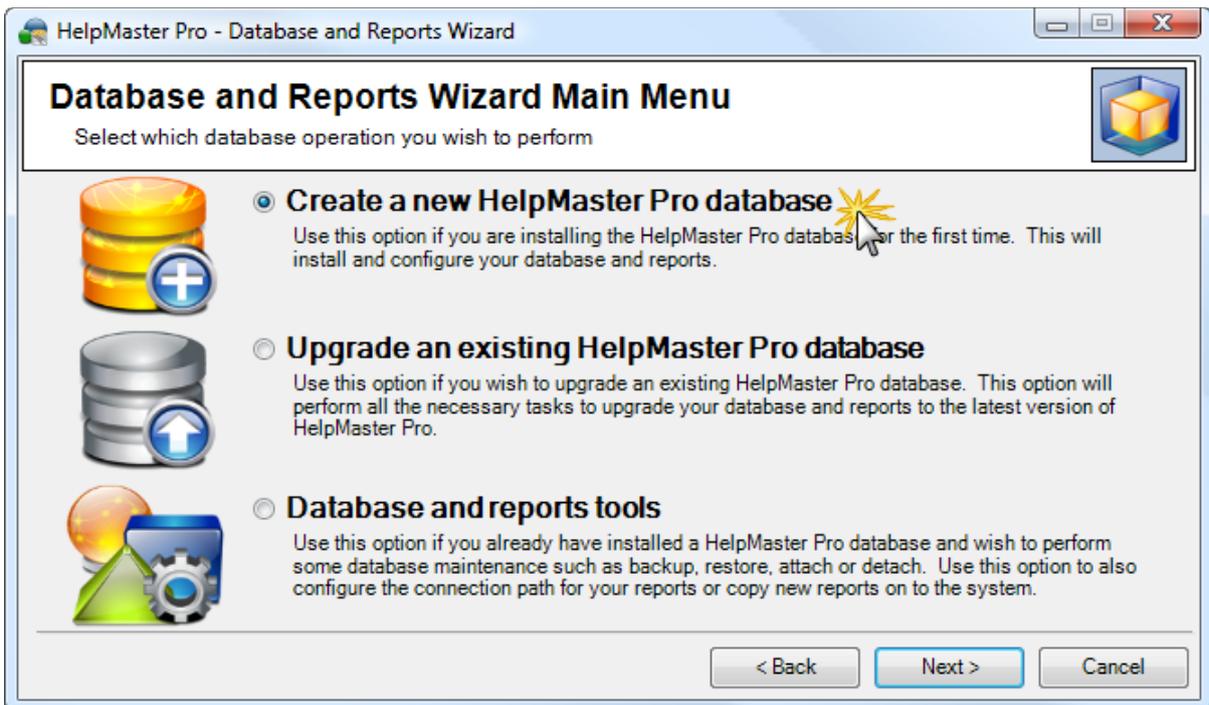
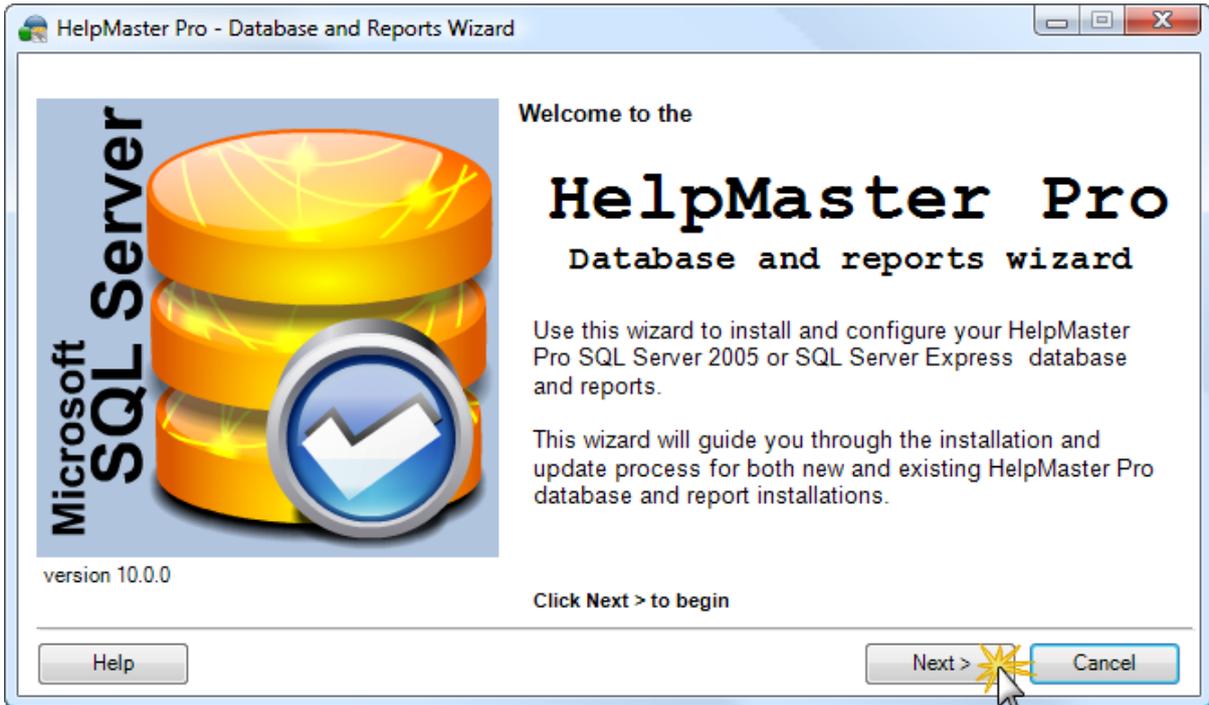
The Database and Reports wizard can make a blank database, or a sample database that you can use for evaluation and training purposes. For an initial evaluation of HelpMaster, it is recommended that you create a sample database. This will allow you to quickly see how HelpMaster operates with sample data.

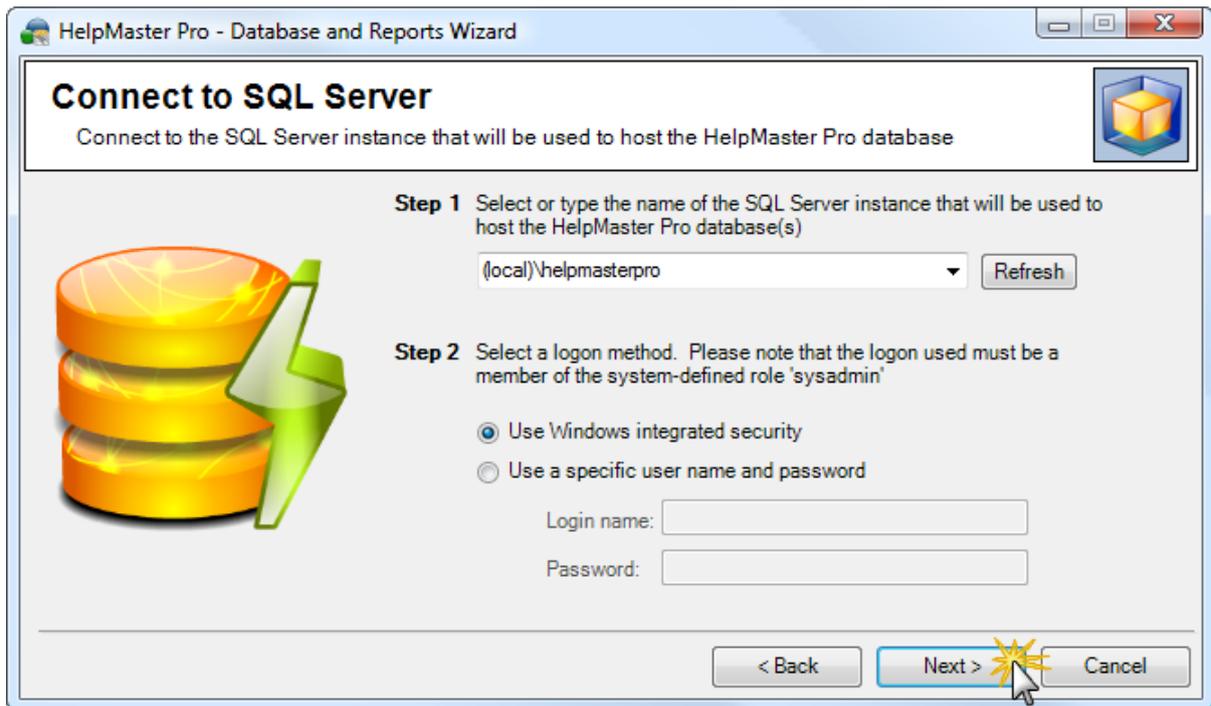
You can run the Database and Reports Wizard at any time to create more databases as you need. If at any time you feel you would like to start configuring your own database from scratch, create a blank database.

Create your database

Follow these steps to create your database.

1. Click on the Windows **Start** button
2. Select **All Programs > HelpMaster > HelpMaster Database and Reports Wizard**. The following screen will appear.





If you chose to install SQL Server during the HelpMaster installation, type **(local)\helpmaster** into the text box at Step 1.

If you did not install SQL Server during the HelpMaster installation, select the name of the SQL Server instance that you wish to use from the drop-down box, or type it.

HelpMaster Desktop

Now it's time to start using HelpMaster itself.

1. Click on the Windows **Start** button
2. Select **All Programs > HelpMaster > PRD HelpMaster**. The logon screen will appear



3. If you have connected to the blank database, the only logon is

Logon : admin

Password : leave blank – there is no password

4. If you have connected to the sample database, you can use the “admin” logon above, or use a sample staff member account. Each of these accounts also has full administrative privileges. Try any of the following – they all have a blank password

Logon : evansm

Logon : clarkeg

5. Once you're logged in, you'll see a number of information messages appear as well as the “Welcome” screen. These can be configured so that they do not appear in the future.
6. At this stage, it is highly recommended that you work your way through the “Quick start” guide that is part of the HelpMaster helpfile. Press F1 (or the **Help** menu) to view the help file.

Configuring other HelpMaster modules

From the HelpMaster desktop edition, you can configure the other HelpMaster modules (look under the “Modules” menu). This includes the powerful Email Manager, Priority Manager, Active Directory and the Web Module.

Please note, that the Email Manager, Priority Manager and Active Directory modules perform the actions that you specify via a running Windows service. These services need to be configured and running before these products will work.

Using HelpMaster in a networked, live setting

Evaluating HelpMaster on a local workstation is a fast and easy way to get to know HelpMaster. If you like what you see, no doubt you would like to evaluate HelpMaster in a “live” networked environment and see what the rest of your business and peers think.

HelpMaster is team software, and the best way to truly appreciate its capabilities and suitability for your business to trial it in a networked, live setting.

To get others involved in your HelpMaster evaluation, you’ll simple need to install the Desktop edition on each workstation, and then connect them to the database that you created. Once a staff account has been created for them, they’ll be able to logon.

Get involved!

HelpMaster has a great on-line community of people from all around the world and from many different businesses and operational environments.

Share ideas, solve problems, and get help about configuration, installation and template design.

HelpMaster on-line community home

<http://www.helpmasterpro.com/community.aspx>

Appendix A - SQL Server security permissions

Overview

The following information will help to configure the minimum SQL Server security settings required for your HelpMaster database. Please note that the information here relates to database security, that is, the security configuration of Microsoft SQL Server - **not the security model within the HelpMaster**. Note also that the information offered here is *just one of many different ways* of configuring SQL Server security. Database security is a complex subject, and to implement a SQL Server security strategy that best suits your environment, *it is highly recommended that you consult with your database administrator* before and during the setup and configuration of HelpMaster.

SQL Server Connection methods

When connecting to any Microsoft SQL Server database, there are 2 options for establishing the network connection between the client computer (the computer running HelpMaster) and the database server (where SQL Server is installed). HelpMaster supports both of the following options:

Trusted Windows account.

When the trusted Windows account authentication is used, HelpMaster will attempt to connect to the Microsoft SQL Server HelpMaster database via the Windows account that is currently logged into the machine that HelpMaster is being used on. In order for this to be successful, the Windows account must be granted permission to SQL Server first.

A specific SQL Server account and password.

When a specific SQL Server Account and password is used, HelpMaster will attempt to connect to the Microsoft SQL Server HelpMaster database via a specific account that has already been configured on the Microsoft SQL Server. In order for this to be successful, the SQL Server account must be created within SQL Server first.

For complete information about the different types of connection methods, please refer to the [Microsoft SQL Server documentation](#).

Administrator vs. Non administrator within HelpMaster

Different functions within HelpMaster Pro require different database privileges. For the most part, each module of the HelpMaster Pro suite will require database privileges that include the standard database operations of reading, writing and deleting data within the tables of the database. Execute permissions on stored procedures is also required. However, certain administrative functions such as the creating or editing of custom fields will require the removal (drop view) and creation (create view) of database views. These database operations (drop view and create view) require a higher level of database access than the more standard operations of reading and writing of data. For this reason, it is recommended that 2 different types of SQL Server database logins are created to cater for each type of HelpMaster Pro user. It is possible to create just one account to cater for both types of logins; however this means that non-HelpMaster administrators will be connecting to SQL Server with an account that has elevated database privileges that they will never use.

If using Windows authentication

The following script will create a new Windows authenticated login with the minimum database permissions required to use all features of HelpMaster. This style of login should be used for an administrator of the system. Copy everything below and paste it into a new query window of Microsoft SQL Server Management Studio.

Note! You will need to edit this script before you can use it. Replace the details inside the square brackets [replace this text] with your details.

```
USE [Your HelpMaster database name]
GO

-- Add an AD user account to SQL server logins
CREATE LOGIN [DOMAIN\UserOrGroupName] FROM WINDOWS WITH DEFAULT_DATABASE=[Your HelpMaster database name] DEFAULT_LANGUAGE=[us_english]
GO

-- Now associate this AD account with the HelpMaster database
-- Also associate this database user with the "dbo" schema
-- The "dbo" schema contains all of the HelpMaster database objects (tables, views, stored procedures etc)
CREATE USER [DOMAIN\UserOrGroupName] FOR LOGIN [DOMAIN\UserOrGroupName]
GO

-- Now grant the ability to "execute" the stored procedures contained within the "dbo" schema
GRANT EXECUTE ON SCHEMA::[dbo] TO [DOMAIN\UserOrGroupName]
GO

-- The build-in SQL Server role "db_datareader" allows logins to read data
EXEC sp_addrolemember N'db_datareader', N'DOMAIN\UserOrGroupName'
GO

-- The build-in SQL Server role "db_datawriter" allows logins to write data
EXEC sp_addrolemember N'db_datawriter', N'DOMAIN\UserOrGroupName'
GO

-- Only administrators will have these privileges
-- These permissions are required for re-creating the custom field crosstab views used by HelpMaster
-- which is triggered by either updating or creating a new custom field from the System Codes screen,
-- or by updating the custom field definition of an entity via the "Administration > Custom fields" menu with HelpMaster
GRANT CREATE VIEW TO [DOMAIN\UserOrGroupName]
GRANT ALTER ON SCHEMA::[dbo] TO [DOMAIN\UserOrGroupName]
```

If using SQL Server security

The following script will create a new SQL Server login with the minimum database permissions required to use all features of HelpMaster. This style of login should be used for an administrator of the system. Copy everything below and paste it into a new query window of Microsoft SQL Server Management Studio.

Note! You will need to edit this script before you can use it. Replace the details inside the square brackets [replace this text] with your details.

```
-- Insert the name of your HelpMaster database in the line below
USE [Your HelpMaster database name]
GO

-- Create a new SQL Server login
CREATE LOGIN [HelpMaster Administrator] WITH PASSWORD=N'Password goes here', DEFAULT_DATABASE=[Your HelpMaster database name], DEFAULT_LANGUAGE=[us_english], CHECK_EXPIRATION=OFF, CHECK_POLICY=ON
GO

-- Now associate this new SQL Server login with a user in the HelpMaster database
-- Also associate this database user with the "dbo" schema
-- The "dbo" schema contains all of the HelpMaster Pro database objects (tables, views, stored procedures etc)
CREATE USER [HelpMaster Administrator] FOR LOGIN [HelpMaster Administrator] WITH DEFAULT_SCHEMA=[dbo]
GO

-- Now grant the ability to "execute" the stored procedures contained within the "dbo" schema
GRANT EXECUTE ON SCHEMA::[dbo] TO [HelpMaster Administrator]
GO

-- Now grant the ability to "alter" the "dbo" schema which contains the views that need to be re-created
GRANT ALTER ON SCHEMA::[dbo] TO [HelpMaster Administrator]
GO

-- The build-in SQL Server role "db_datareader" allows logins to read data
EXEC sp_addrolemember N'db_datareader', N'HelpMaster Administrator'
GO

-- The build-in SQL Server role "db_datawriter" allows logins to write data
EXEC sp_addrolemember N'db_datawriter', N'HelpMaster Administrator'
GO

-- Only administrators will have this privilege.
-- This permission is required for re-creating the custom field crosstab views used by HelpMaster
-- which is triggered by either updating or creating a new custom field from the System Codes screen,
-- or by updating the custom field definition of an entity via the "Administration > Custom fields" menu with HelpMaster
GRANT CREATE VIEW TO [HelpMaster Administrator]
```

