

# Upgrading HelpMaster



helpdesk | customer service | service desk | workflow

June 2024

Refers to HelpMaster v24

## Overview

New versions of HelpMaster are released periodically to improve stability, ease-of-use and functionality.

Upgrading is a simple and quick task. Use this guide as a reference for upgrading an existing installation of HelpMaster.

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## Upgrading Overview

Upgrading HelpMaster is a relatively straightforward task that should take less than an hour to complete the actual process. Planning for, and ensuring the upgrade is successful may take longer, and configuration of new features and workflow is another process entirely.

Staying up to date with the latest versions of HelpMaster is the best way to take advantage of the improvements, fixes and service-management best-practice for your team.

### Getting help

Remember that if you require any assistance, or have questions, please contact PRD Software (see details at end of this document) – we're here to help. We also offer a [remote upgrade service](#) where we can perform the entire upgrade for you.

For a quick introduction to upgrading, refer to the online [Upgrading Frequently Asked Questions](#)

## Finding out when there is a new version

New versions of HelpMaster are released periodically. Each release usually has a mix of performance improvements, stability improvements (bug-fixes), as well as feature enhancements and new features.

Whenever a new release of HelpMaster is available, PRD Software will broadcast this to the following channels:

- The **HelpMaster website** (<https://www.helpmasterpro.com>) will be updated. Use the **Support > Download** menu to view the latest build available.

The screenshot shows the HelpMaster website interface. At the top, the navigation bar includes 'Features', 'Solutions', 'Services', 'Support', 'Pricing', and 'Company'. The 'Support' menu is highlighted with a red circle, and a dropdown menu is visible with options: 'Support for HelpMaster', 'Download' (highlighted with a red arrow), and 'Support FAQ'. Below the navigation bar, the main content area is titled 'Downloads for HelpMaster'. A red box highlights the 'Existing users of HelpMaster' section, which contains instructions for current users to visit the support portal at <https://support.prdsoftware.com/services> to find download links and product information. It also notes that registration/login is required and mentions the latest version: HelpMaster v24.0.40.0, released 25 May 2024. To the right, a sidebar shows the user's profile and a list of services. The main content area also displays the 'Latest version of HelpMaster information' and 'Downloads links'.

- A tweet will be sent to the **HelpMaster Twitter account**. Follow @HelpMaster on Twitter for new, tips and tricks and other information. <https://twitter.com/HelpMaster>
- A post will be made to the HelpMaster **Facebook page**. Follow <https://www.facebook.com/helpmasterpro> for details, or join the HelpMaster Facebook Group
- If you've logged a feature request, bug report or other support issue that was addressed in the release, you'll also receive an **email notification** from PRD Software.
- Consider also signing up for the HelpMaster newsletter. <http://www.helpmasterpro.com/Support/Community/Newsletter-opt-in-page>

## What's new in each version?

Each new release comes with a full version history in 2 formats.

A general “What’s new” which highlights new features and enhancements, as well as a detailed version history for each change. Both can be viewed at the HelpMaster website, by hovering over the “Support” menu at <https://www.helpmasterpro.com/download/>

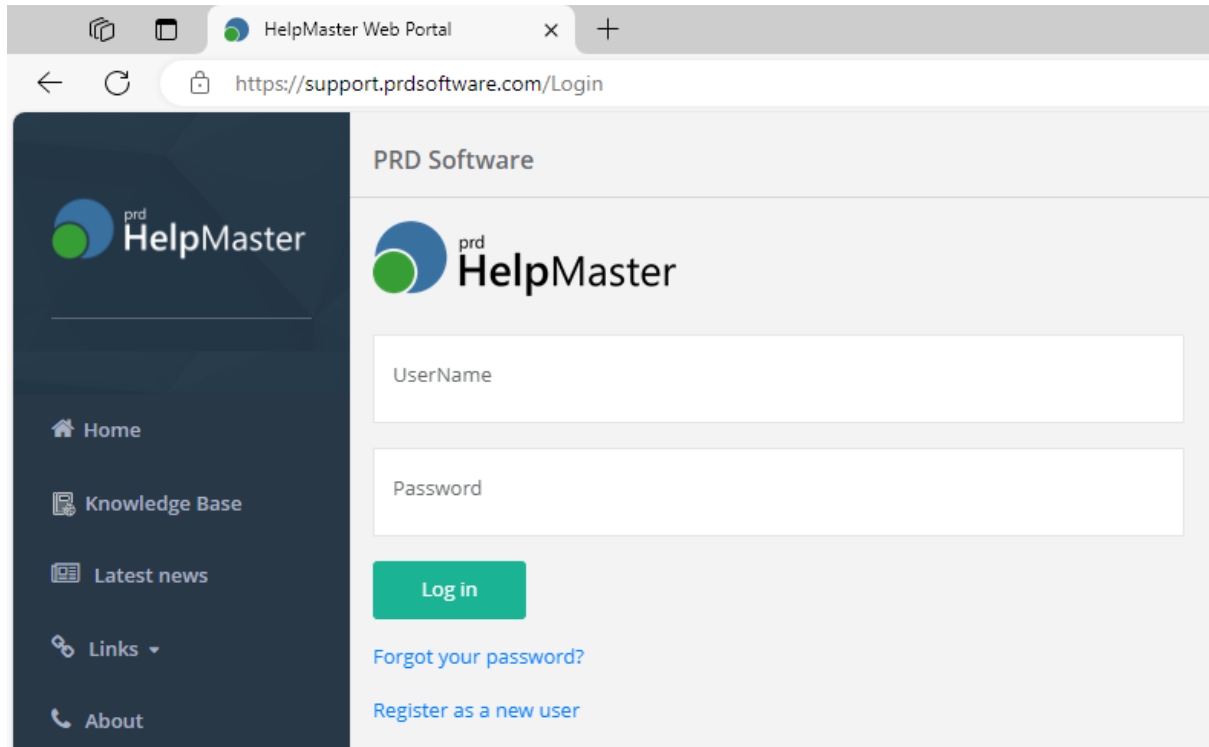
## Have a great idea for product development?

PRD Software maintain a long list of development “to do” items, wish-list item, bugfixes and product enhancements. These items are triaged according to impact, market forces, and other factors. If you have a suggestion for a feature or a great idea for the development of HelpMaster, please contact PRD Software and let us know – we’d love to hear your ideas.

## Getting the latest version

The latest version of HelpMaster can always be downloaded from the HelpMaster support portal, <https://support.prdsoftware.com/Login>

Login to the site via the “**Login**” link at the top-right of the page. If you do not have a login, please register with the site using the “**Register**” link.



Once logged in, select the “Services” link in the menu on the left.

If your login is associated with a your company and your company has an active HelpMaster Subscription, you will see a page with download links on it.

### No “Services” link?

If you do not see a “Services” link, and you believe you should, please contact [PRD Software](#).

**HelpMaster User**  
Ph: 02 6278 4664  
helpmaster@wizbangwidgets.com  
My Account ▾

Home  
Log new request  
View my Jobs  
Knowledge Base  
Latest news  
Links ▾  
About  
Services

PRD Software

## HelpMaster services

Home / HelpMaster services

### Latest version of HelpMaster information

- **Current version of HelpMaster:** v24.0.40.40
- **Released:** 25 May 2024
- **General version history:** [What's New for v24](#)
- **Detailed version history:** [HelpMaster Version History](#)

### Downloads links

- All download link below are for the latest version of HelpMaster.
- **Note!** All downloads are hosted from [www.mediafire.com](http://www.mediafire.com)

### Executable installer

The .exe installer is the most complete HelpMaster installer. It is recommended that it should be used when installing HelpMaster on a clean machine.

- **64 bit version:** [Download HelpMaster 64 bit .exe installer](#)
- **32 bit version:** [Download HelpMaster 32 bit .exe installer](#)

### .MSI installer

This .msi installer only contains HelpMaster, and no other dependencies.

HelpMaster is offered in 32 and 64-bit variants, and also in .msi and .exe formats.

### 32-bit vs 64-bit?

If using Microsoft Outlook with HelpMaster, you need to use the same bitness version that Outlook is using on that machine. ie. If you use the 32 bit version of Outlook, you'll need the 32 bit version of HelpMaster.

You can use a mixture of 32 and 64 installs throughout your business as per individual machine configuration. Both 32 and 64 bit HelpMaster modules can connect to a 32 or 64 bit SQL Server.

Bear in mind that HelpMaster can also send email using SMTP connections to on-line email sources - you do not have to have Outlook, or use it to send email if you have other options.

\* 64 bit version can only be installed on 64 bit operating systems and requires a 64 bit version of Microsoft Outlook.

### .msi or .exe file?

The .exe file contains HelpMaster, the Crystal Reports runtime engine, as well as other product dependencies. The .exe version of the installer is intended for those that wish to run and view



reports on their machine and for installing HelpMaster on fresh OS builds to deploy other dependencies.

The .msi files only contain the HelpMaster executables. It does not have the Crystal Reports runtime engine, or any other product dependencies. The .msi is only included here for those who only need to install the HelpMaster Desktop on client machines and wish to do so via a .msi rollout. Such installations will not be able to run reports unless the Crystal Reports runtime is installed as a separate installation.

### System Requirements

For the latest system requirements, please refer online to <http://www.helpmasterpro.com/Resources/System-Requirements>

### Upgrading Frequently Asked Questions

Once you have downloaded the correct version of HelpMaster and are ready to upgrade, please view the on-line [Upgrading Frequently Asked Questions](#).

This page contains many questions and answers about upgrading.

If there is any question that is not covered here, or in this document, please contact PRD Software.

## Upgrade Checklist

Use the following checklist to ensure a smooth upgrade **BEFORE** the actual HelpMaster upgrade.

### **Version 21/22 notice – licensing information !!**

Before upgrading to version 21 or 22 of HelpMaster, please read this important information here: <https://docs.helpmasterpro.com/docs/installation/upgrade-helpmaster/upgrade-to-v21-notes/>

#### **Am I licensed to upgrade to the latest version of HelpMaster?**

Only those with a current Annual Maintenance Subscription (AMS), or those using the monthly plan can upgrade to the latest versions. If you are unsure, please contact PRD Software.

#### **I am planning on changing the name of the database and/or moving the HelpMaster SQL Server database to another SQL Server instance/machine.**

**Important!** You will need a new HelpMaster registration code in this case. Please contact PRD Software to arrange this. You will not be able to use the upgraded version of HelpMaster if you don't have this license code.

#### **Have I planned for some down-time? Is the business aware of this?**

During the upgrade, the database will need to be upgraded, and the web-portal will need to be refreshed. This does not take long, but it will involve a short period of down-time.

#### **Perform necessary system updates**

Before doing the actual HelpMaster install, please ensure that the [system requirements](#) have been met. The technical specifications may change from version to version of HelpMaster. Take this opportunity to upgrade any systems, apply any service packs (Windows and others) etc.

## Screenshots used in this document

The screenshots used in this document are generally from the latest builds of HelpMaster, so depending on what version you're currently using, the screens may look a little different, or, in the case of very old versions may not exist.

# Upgrade Procedure

## Step 1 - Log everyone out of HelpMaster

It is a good practice to log all current users of HelpMaster out of the product and prevent them from logging back in until the upgrade process has been complete. This will ensure that no-one is half-way through logging/updating a job (or other entity) while the database and/or web service is briefly taken off-line.

Log into HelpMaster with an administrative account and select the **Administration** menu > **System Administration** button > **Logged on users** tab.

**System administration - Logged on users**  
Use this screen to view and manage user logons.

**Licence types in use**

Named	Concurrent	CAL
0/5	1/5	0/∞

**Concurrent Staff licences**

Used	Total	Remaining
1	5	4

**Logged on users**

User ID	User Name	Licence type	Desktop
EvansM	Matthew Evans	Concurrent	✓

**User logon management**  
Use the settings here to force user logoff after a specified time, and set a date/time when logins allowed again. This option may be useful when performing system upgrades, database re-locat

✓ Logins are currently allowed

Log off all users (including web users) in: 2 mins

Do not allow users to log back in until: 30/11/2023 7:00 PM

**Start Log off process**

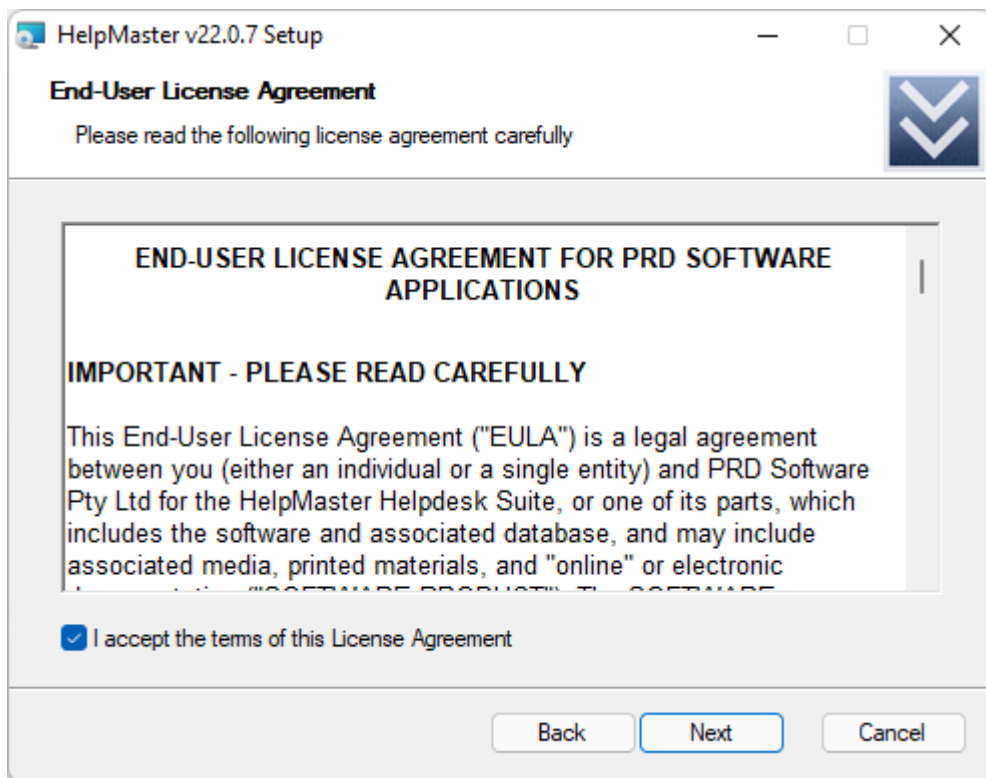
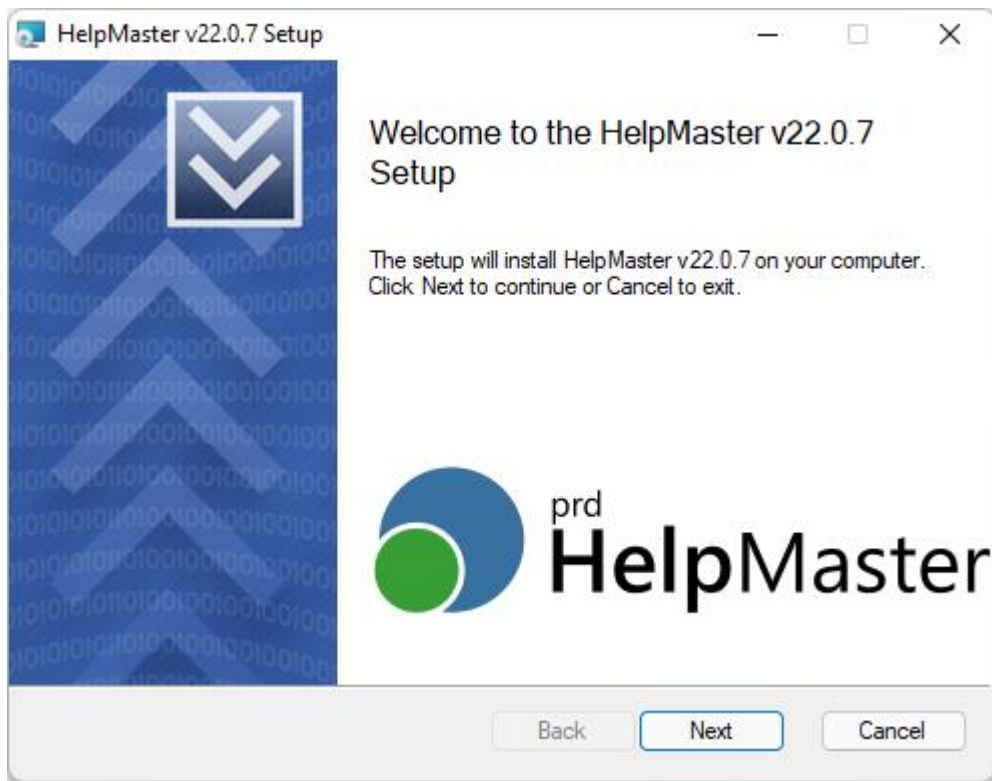
OK Apply Close

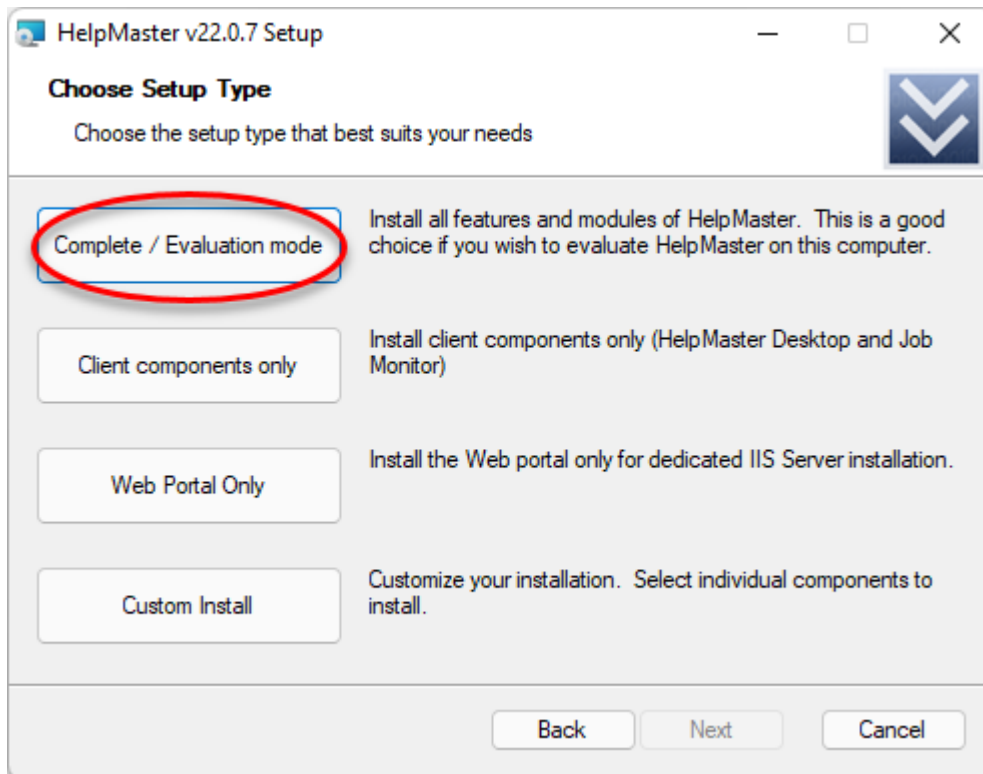
Select a time interval, and a “**Disable logins until**” date (pick a date in the future), and then click the “**Start Log off process**” button. Users that are logged in will receive a message to log off, and will be automatically logged off at the time selected. They will not be able to log-back in until the time specified. You will not be logged off during the process – only other people.

At this point, wait until the time period that you specified has elapsed. This will ensure that all users have finished their work and are logged out of the system. Click the “Refresh user list” to check on the login status of users.

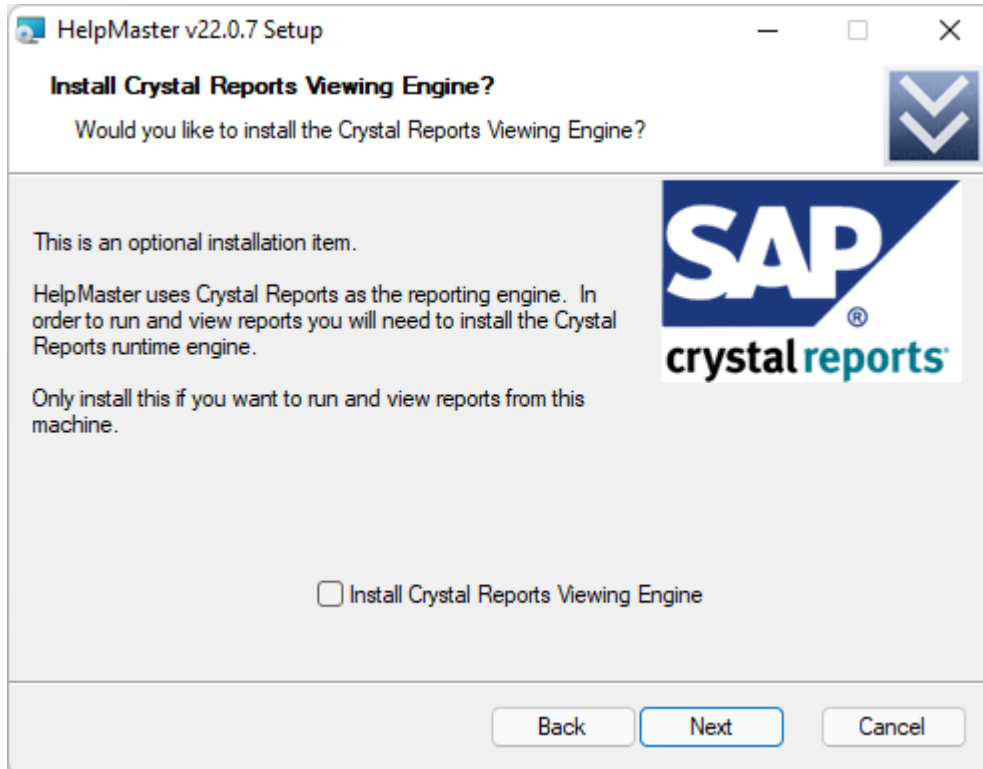
## Step 2 – Install HelpMaster on the server

Working on the HelpMaster server, install the latest version. It is not necessary to uninstall existing versions – this will be done automatically by the installer.

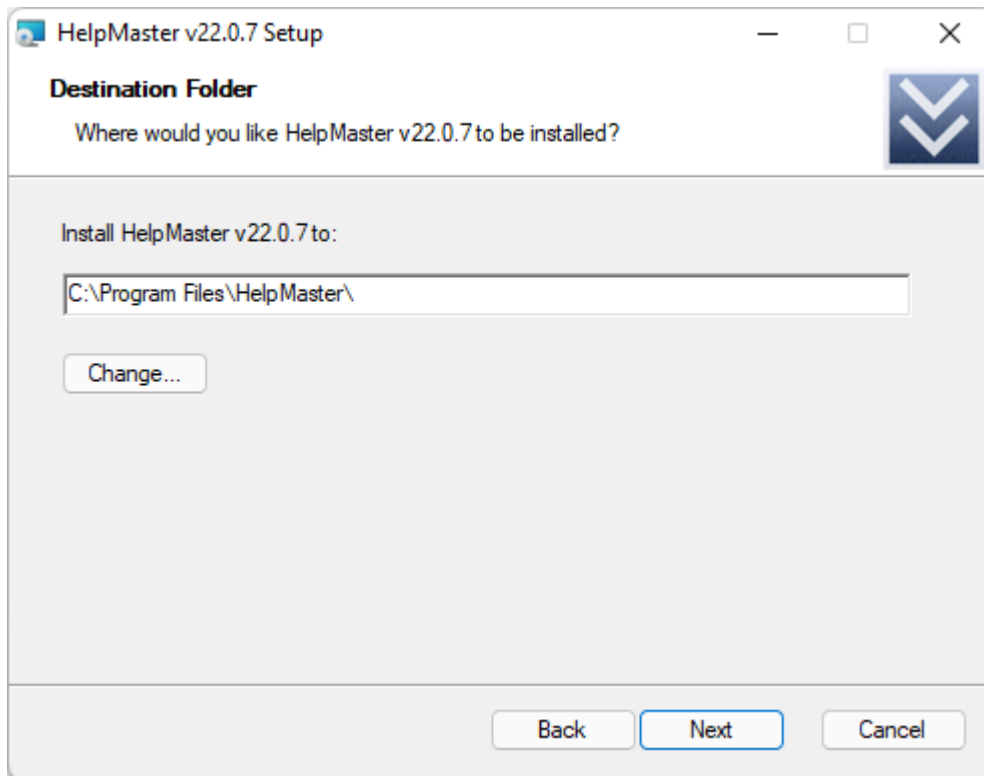




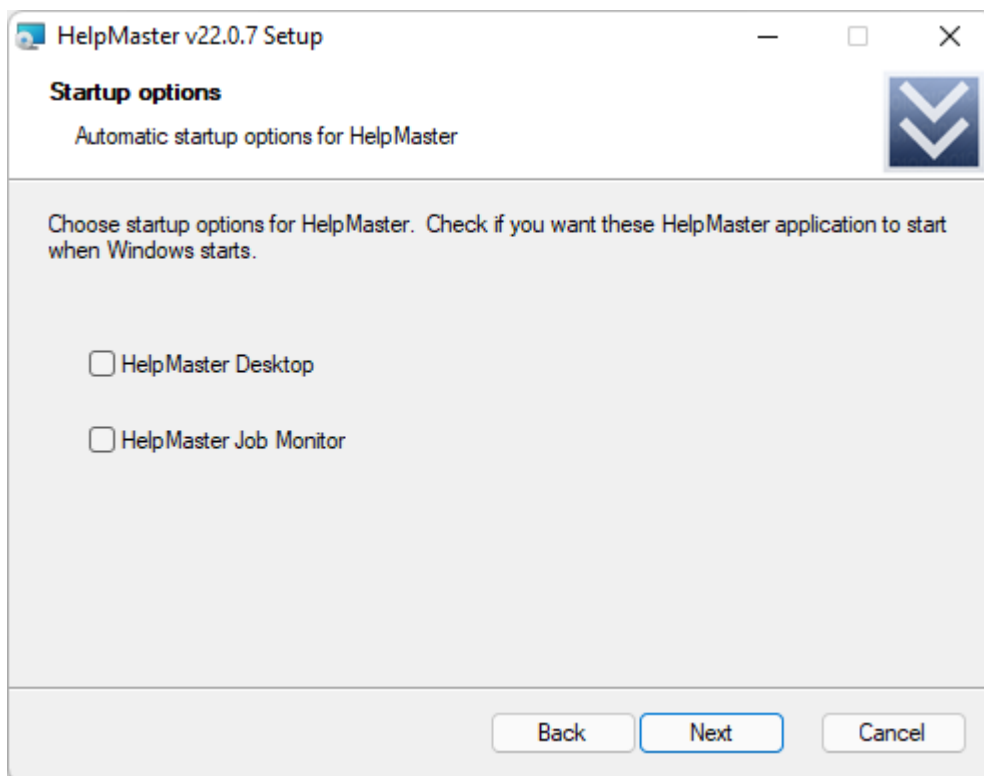
Select **“Complete / Evaluation mode”**. This will install all components of HelpMaster. This is what you want if installing on a “HelpMaster Server” or similar. It will install all components and products including the Desktop edition, Web portal Setup Wizard, and the Database and reports Wizard.



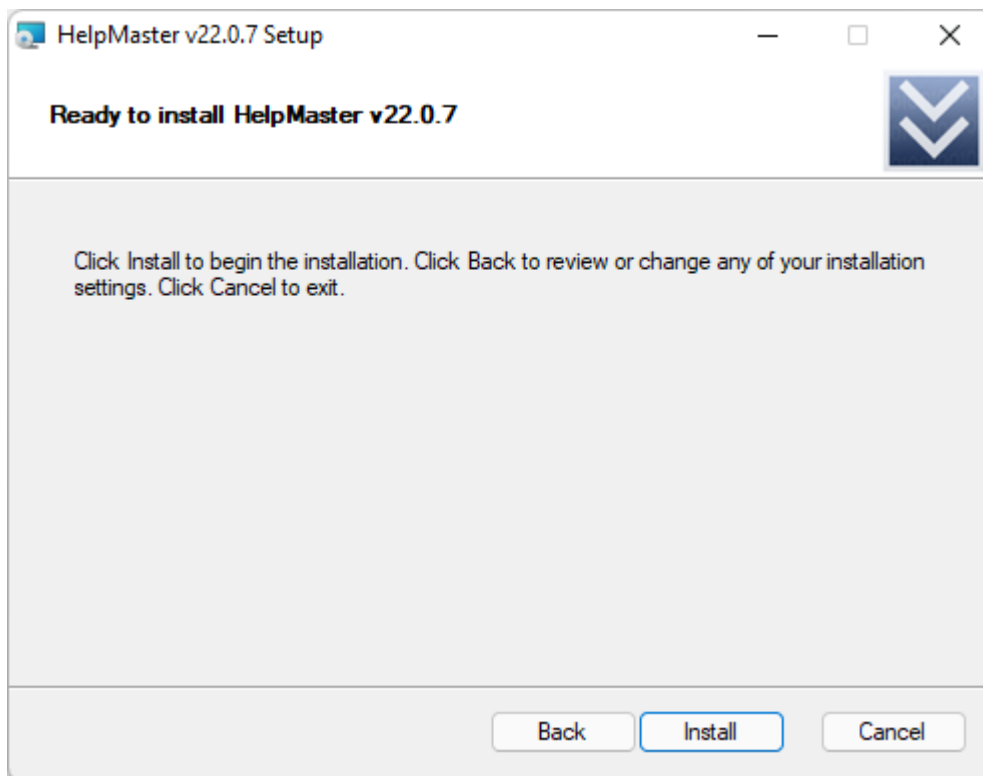
Crystal Reports is the reporting engine that HelpMaster uses. This is an optional install. Check the box if you intend to run report from this machine.



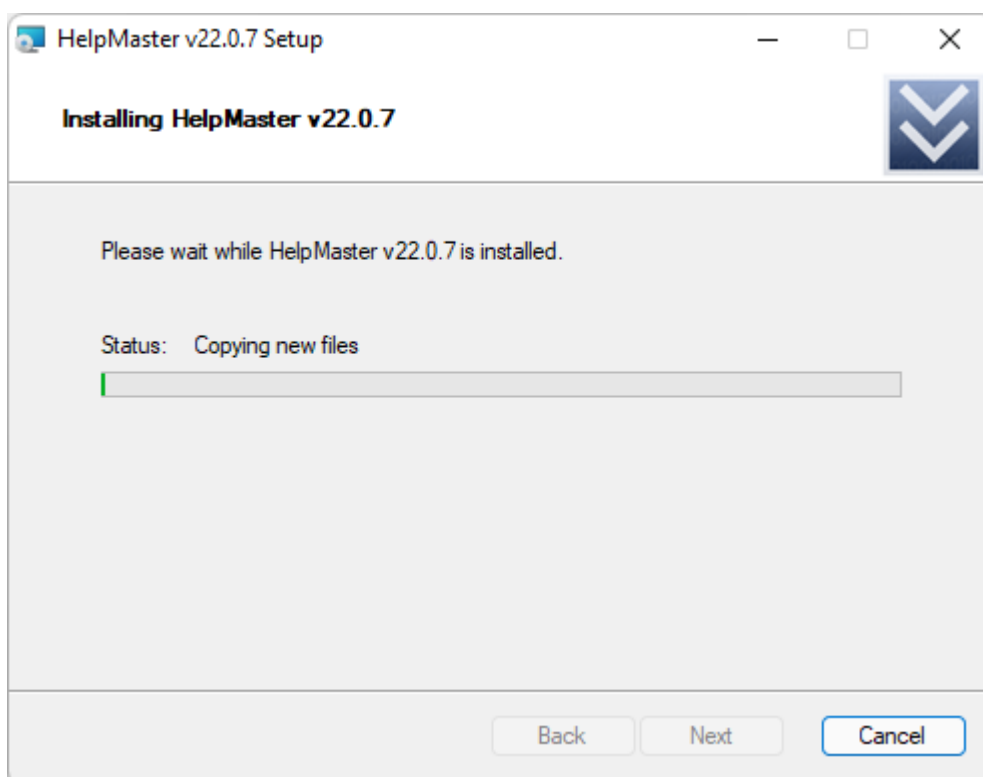
Select the install location. Usually, you will want to install in the same directory as your existing version of HelpMaster.



Choose the automatic startup options. The default is to not automatically start HelpMaster Desktop or Job Monitor when the machine is started.



Click **Install** to begin



The installer will start to install HelpMaster.



Once the main installer has completed, depending on your configuration, additional dependencies may be installed. Each dependency will display a user interface. There may be a slight delay between each component installing. Please be patient at this time.

Additional components may include:

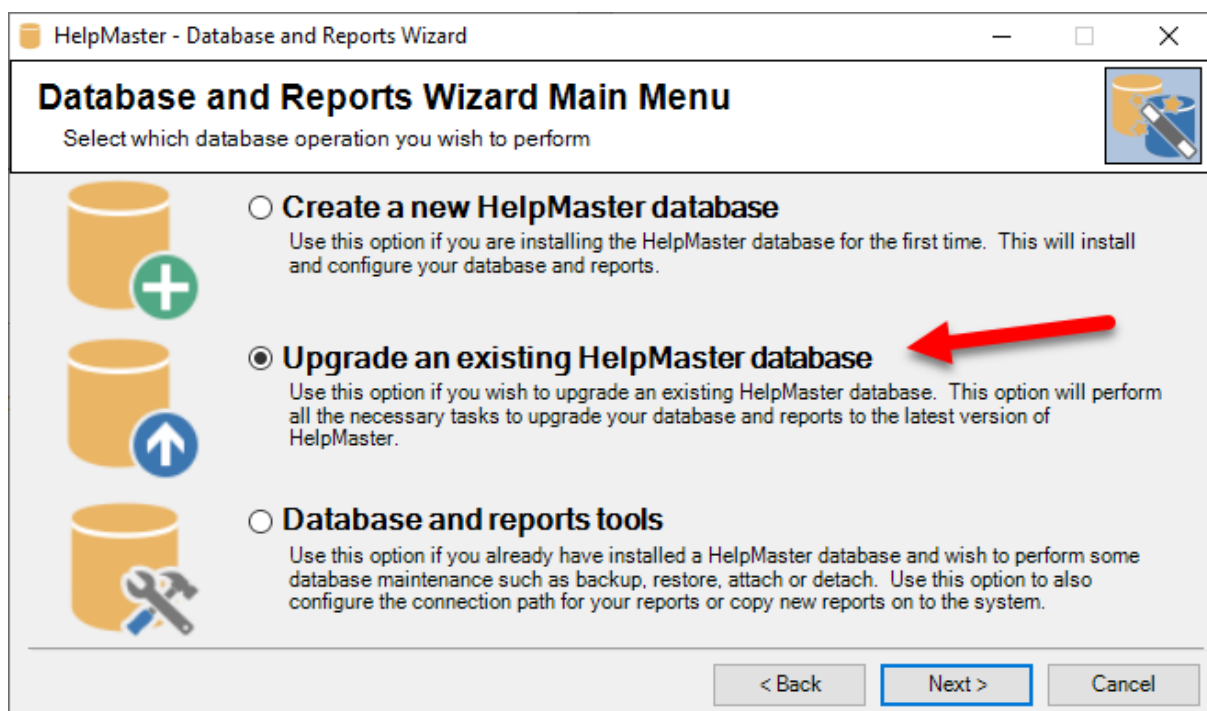
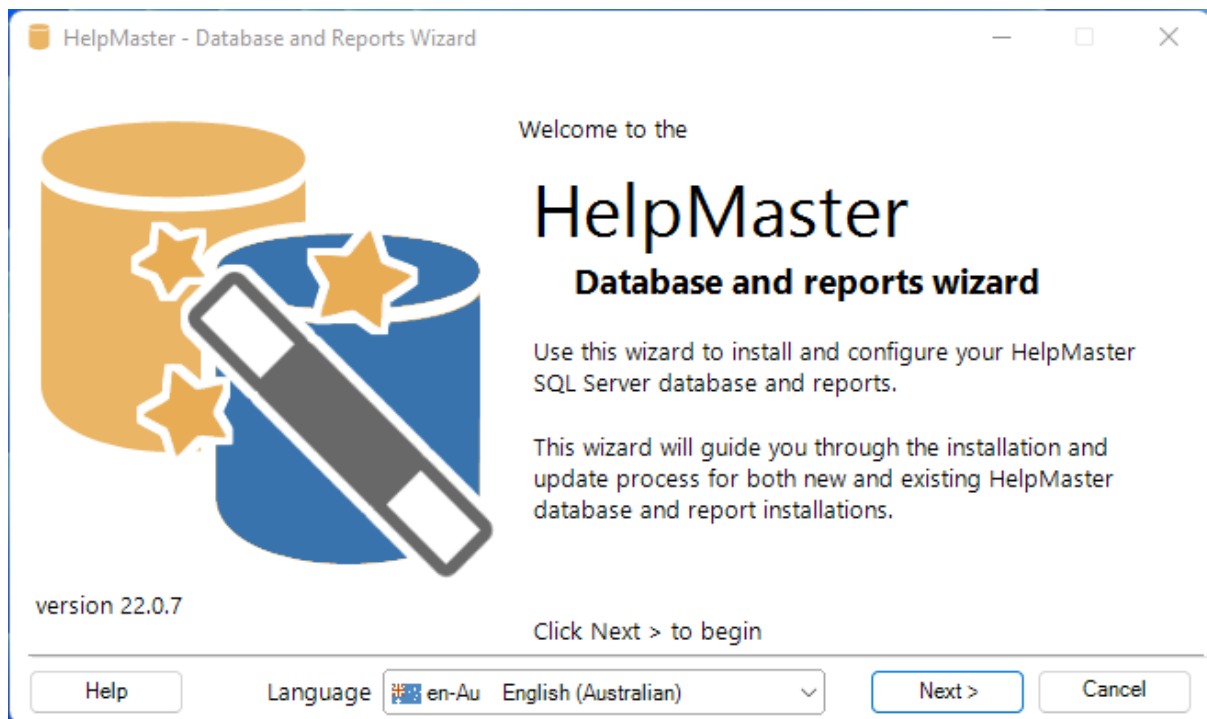
1. SQL Server native client (used for connecting to SQL Server databases)
2. Microsoft .NET 6.0.0 Windows Server Hosting (used for IIS / web portal)
3. Crystal Reports (if selected during the installation options)
4. Microsoft WebView2 control (used for displaying HTML content)



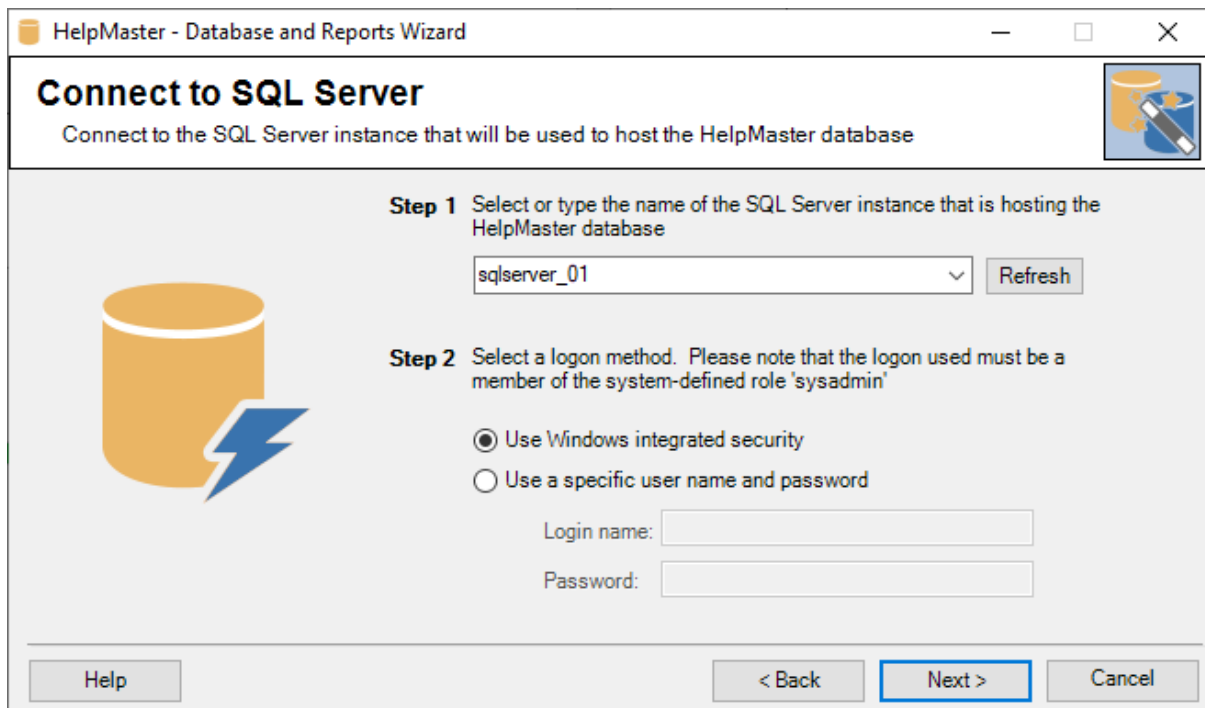
## Step 3 – Upgrade the HelpMaster Database

**It is highly recommended to make a full backup of your SQL Server HelpMaster database before this step.**

Run the HelpMaster Database and Reports Wizard from the Windows Start Menu.

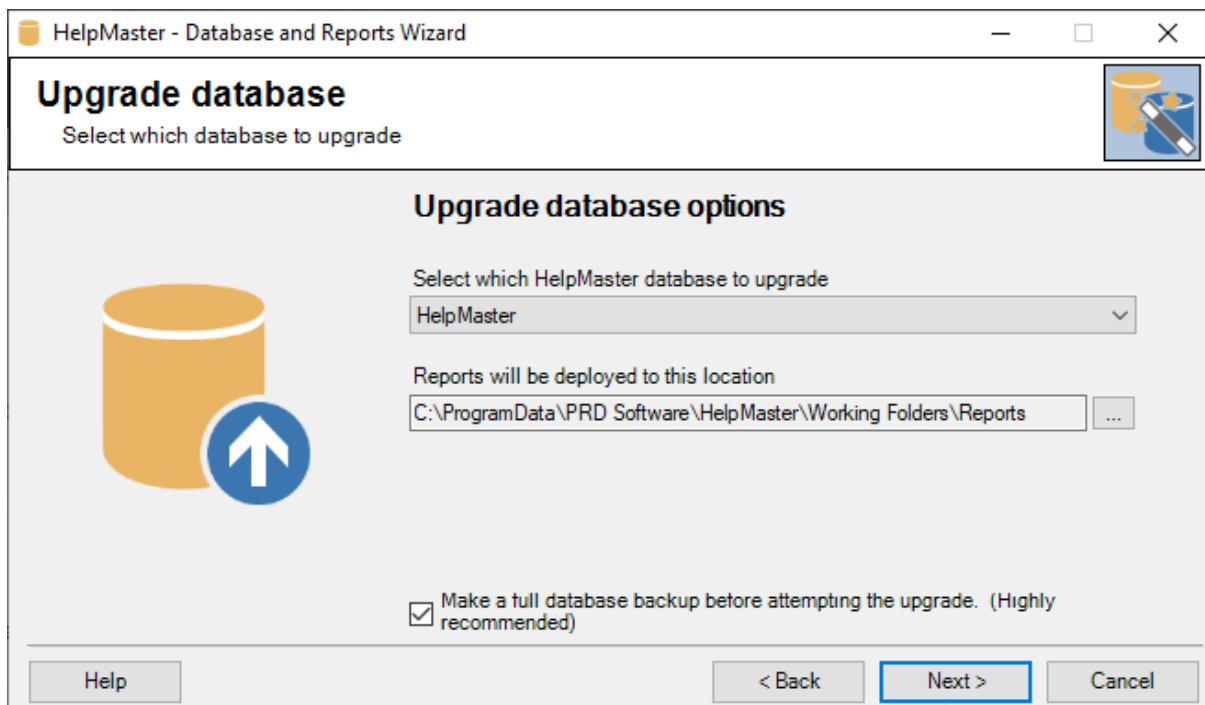


Choose “Upgrade an existing HelpMaster database”



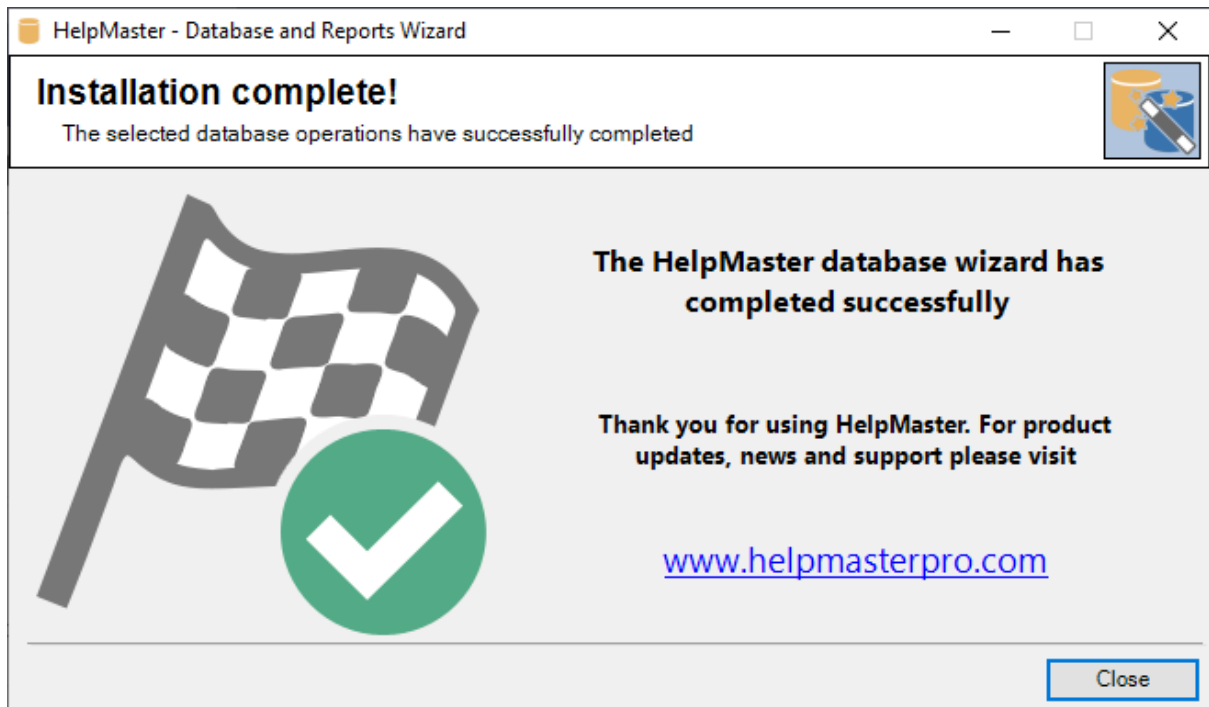
The screenshot shows the 'Connect to SQL Server' step of the 'HelpMaster - Database and Reports Wizard'. The window title is 'HelpMaster - Database and Reports Wizard'. The main heading is 'Connect to SQL Server' with a subtitle 'Connect to the SQL Server instance that will be used to host the HelpMaster database'. On the left is an icon of an orange database cylinder with a blue lightning bolt. The wizard has two steps:   
**Step 1**: 'Select or type the name of the SQL Server instance that is hosting the HelpMaster database'. It features a dropdown menu with 'sqlserver\_01' selected and a 'Refresh' button.   
**Step 2**: 'Select a logon method. Please note that the logon used must be a member of the system-defined role 'sysadmin''. It has two radio buttons: 'Use Windows integrated security' (selected) and 'Use a specific user name and password'. Below these are input fields for 'Login name:' and 'Password:'.   
At the bottom are buttons for 'Help', '< Back', 'Next >' (highlighted with a blue border), and 'Cancel'.

In **Step 1**, select, or type the name of the SQL Server instance that is hosting the HelpMaster database, select the appropriate logon method and click **Next >**



The screenshot shows the 'Upgrade database' step of the 'HelpMaster - Database and Reports Wizard'. The window title is 'HelpMaster - Database and Reports Wizard'. The main heading is 'Upgrade database' with a subtitle 'Select which database to upgrade'. On the left is an icon of an orange database cylinder with a blue circle containing a white upward arrow. The wizard has one step:   
**Upgrade database options**: 'Select which HelpMaster database to upgrade'. It features a dropdown menu with 'HelpMaster' selected. Below this is a text box for 'Reports will be deployed to this location' with the path 'C:\ProgramData\PRD Software\HelpMaster\Working Folders\Reports' and a browse button (...).   
At the bottom is a checked checkbox labeled 'Make a full database backup before attempting the upgrade. (Highly recommended)'.   
At the very bottom are buttons for 'Help', '< Back', 'Next >' (highlighted with a blue border), and 'Cancel'.

Select the HelpMaster database to be upgraded and click **Next >**. On the next screen, click “Run Upgrade” to start the upgrade process. This should only take a few minutes.



The Database and Reports Wizard will display a finish screen at the end if everything is successful. If any errors are reported at any stage of the process, please report these to PRD Software for assistance.

## Step 4 – Upgrade the HelpMaster Web Portal

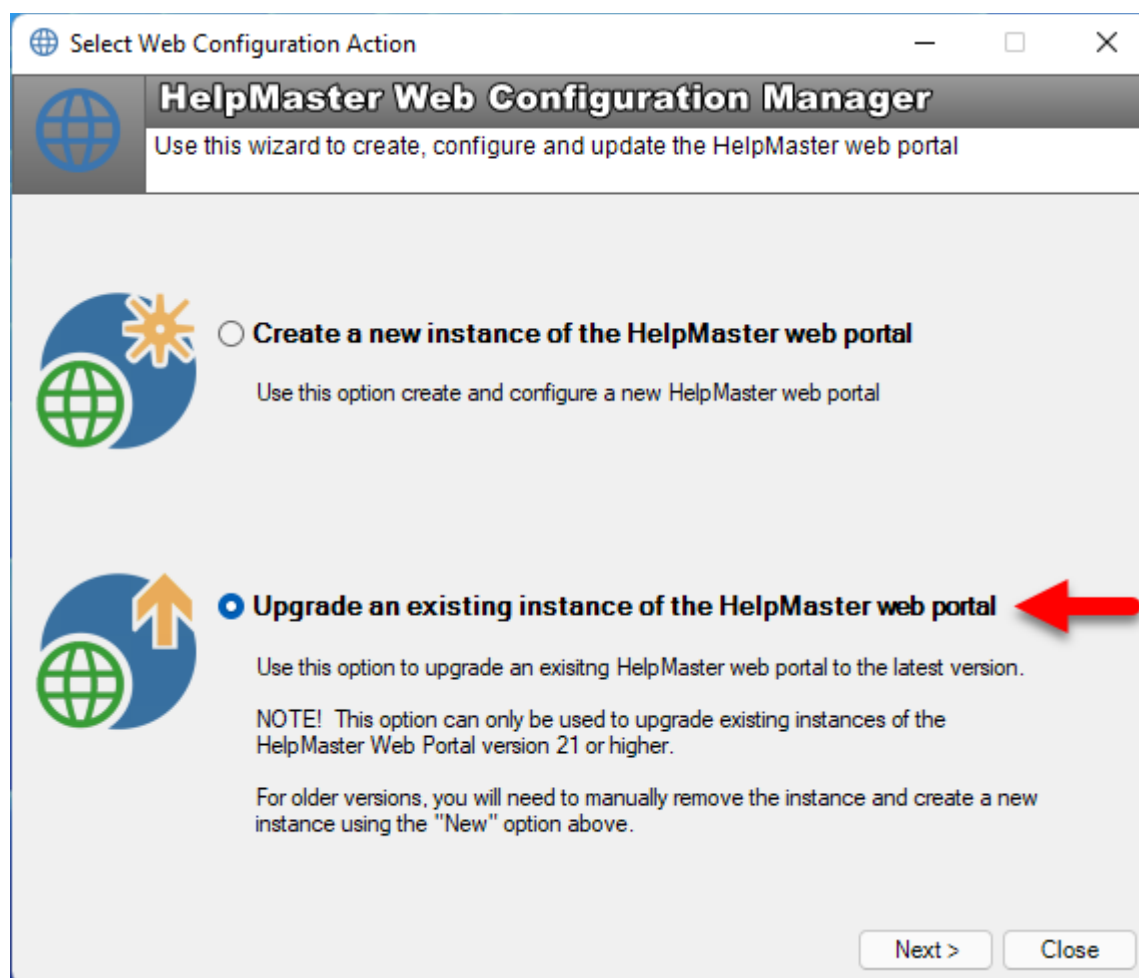
This process is for upgrading the web portal only, and should be performed on the machine that is running and hosting the HelpMaster web portal. This will be your webserver / IIS machine. If you do not have the web portal installed, you should skip this step. To install a new web portal, please refer to the helpfile for detailed steps. The information here is for an **upgrade only**.

### Modified CSS files

Note! If you have modified any style sheets / CSS files, please make a copy of them **before** you attempt the upgrade. The upgrade process will over-write all CSS files and revert your website back to the original state. If you have modified CSS files, you will need to copy this back over the top of the existing files after the upgrade has completed.

### Run the HelpMaster Web Configuration Manager

Start the HelpMaster Web Configuration Manager utility by clicking the Windows **Start** menu and then **All Programs > HelpMaster > HelpMaster Web Setup**



Select "**Upgrade an existing instance of the HelpMaster Web Portal**" and click **Next >**

Upgrade Web Site

## HelpMaster Web Configuration Manager

Select the HelpMaster website you wish to update/upgrade

**NOTE!** This upgrade Wizard will only upgrade existing instances of the HelpMaster Web Portal version 21 or higher.  
For older versions, you will need to manually remove the instance and create a new instance using the "New" option in this wizard.

Select the HelpMaster Web Site that you wish to update.

Site Name	Path	Port	URL
<input checked="" type="checkbox"/> HelpMasterWeb	C:\inetpub\HelpMaster\Web Site	7777	http://localhost:7

Select the HelpMaster Web API that you wish to update

Site Name	Path	Port	URL
<input checked="" type="checkbox"/> HelpMasterWebAPI	C:\inetpub\HelpMaster\Web API	7778	http://localhost:7778

Microsoft IIS Manager... < Back Next > Close

This screen displays the web portal in the top list, and the WebAPI in the lower. If you have both products installed, upgrade both of them by selecting them. Click **Next >** to continue

**Upgrade Web Site**

**HelpMaster Web Configuration Manager**

Confirm HelpMaster Web Site and API Info

**Web Site Name** HelpMasterWeb

**Web Site URL**  
http://localhost:7777

**Web Site root path**  
C:\inetpub\HelpMaster\Web Site

**Web Site Database connection string**  
Data Source=(local);Initial Catalog=HelpMaster Sample;Integrated Security=SSPI;Application Name=HelpMaster

**Web API Name** HelpMasterWebAPI

**Web API URL**  
http://localhost:7778

**Web API root path**  
C:\inetpub\HelpMaster\Web API

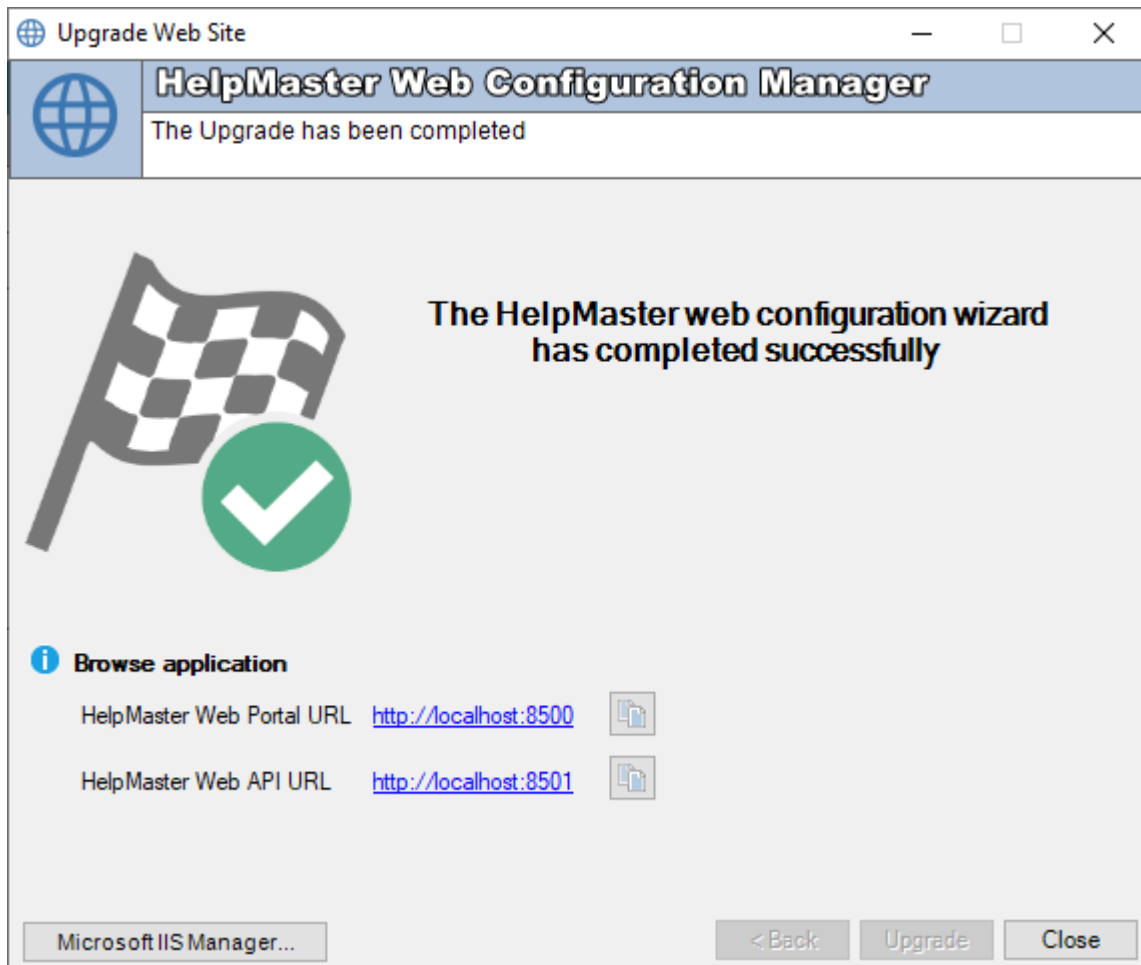
**Web API Database connection string**  
Data Source=(local);Initial Catalog=HelpMaster Sample;Integrated Security=SSPI;Application Name=HelpMaster

Microsoft IIS Manager... < Back Next > Close

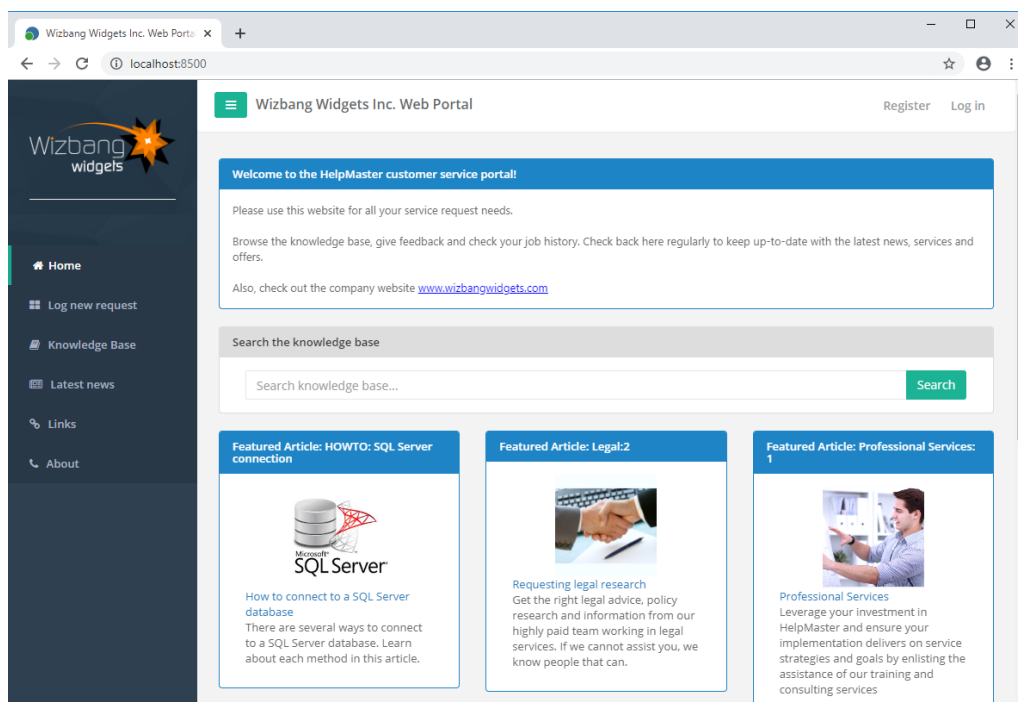
This screen is simply for reference. Double-check that everything looks right.

If you need to update the database connection string, update the appsettings.json file that is located in the directory displayed for the web portal / web API.

Click **Next >** to start the upgrade. This step will only take a few minutes.



Click on the hyperlink to verify that the website is operational. Note that there will be a slight delay in load time after the upgrade as IIS needs to re-compile the website for use. This will be a once-only occurrence.



## Post Upgrade items

If you have customised your style sheet to adjust colour or other CSS options, you will need to copy your modified CSS file back over the top of the newly updated file.

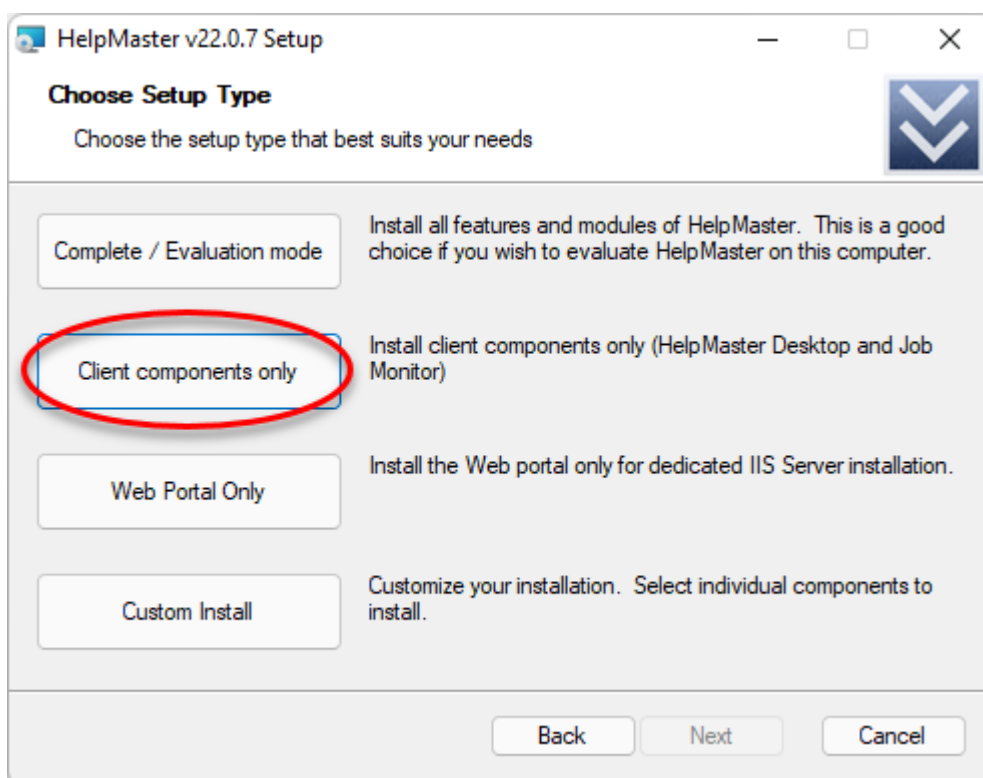
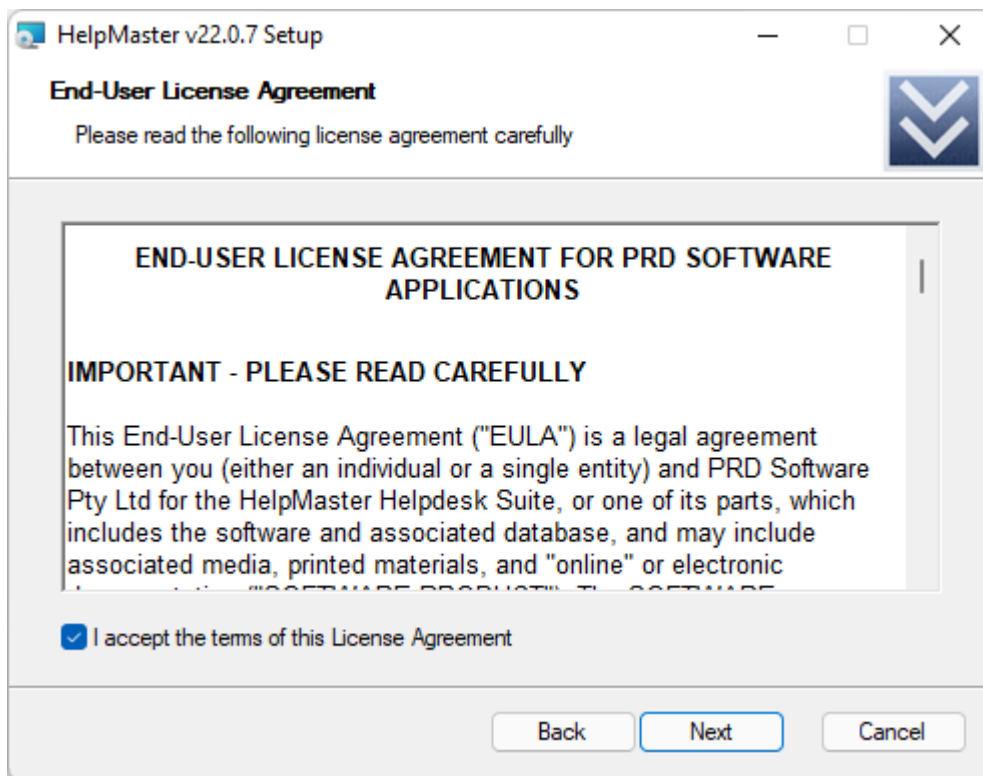


## Step 5 – Install/Upgrade HelpMaster desktop on each PC

The next step is to install and upgrade HelpMaster on each PC where it is currently installed. This can be done manually, or via an automatic deployment tool such as Microsoft SCCM or similar as per your company preferences and/or requirements.

Run the HelpMaster installer. It is not necessary to uninstall existing versions – this will be done automatically by the installer.





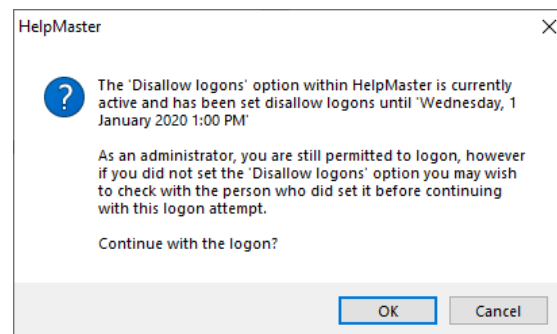
Follow the Wizard through to the end to install HelpMaster.

**Note!** Logins will not be possible at this stage due to the date/time restriction. This is the next step.

## Step 6 – Allow HelpMaster Logons again

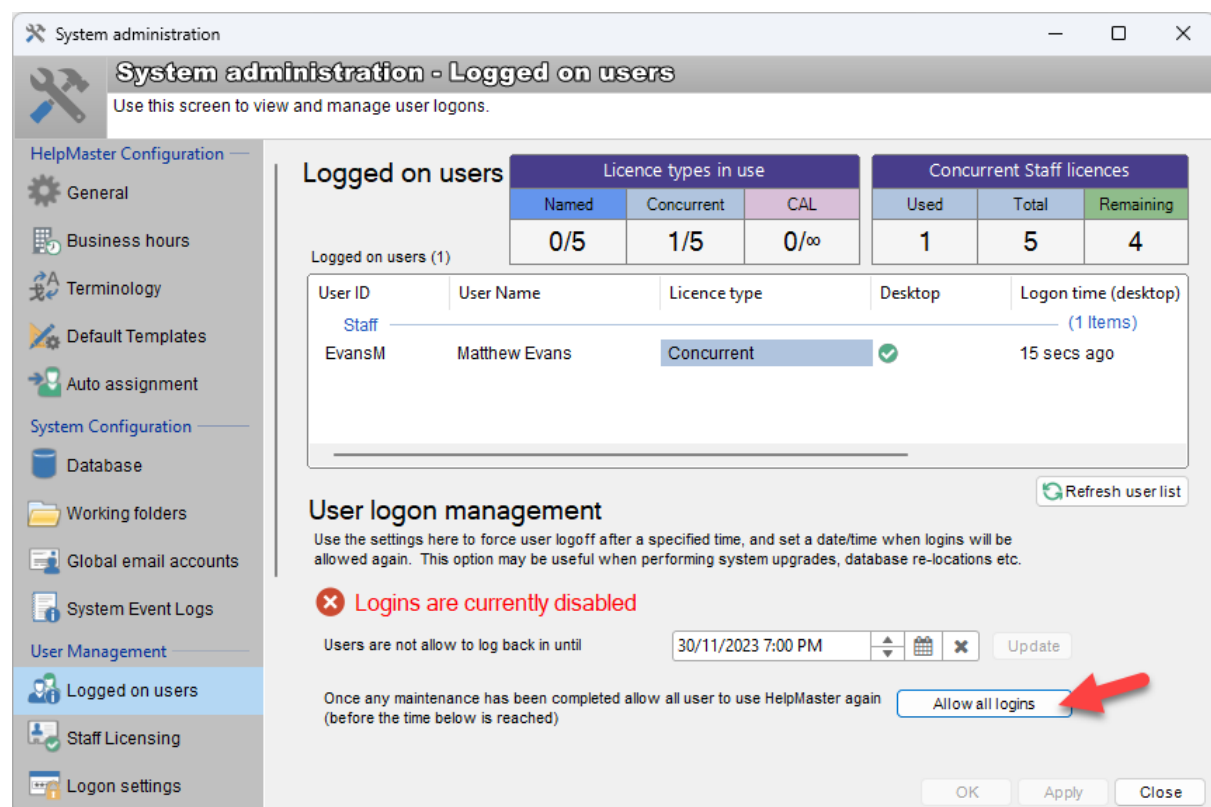
Log back into HelpMaster desktop as the administrator and remove the database logon restriction that was set in step 1.

When attempting to logon to the desktop you'll see this message:



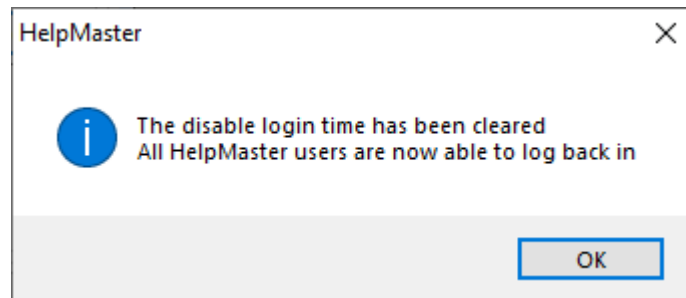
Click **OK** to continue with the logon.

Once logged in, select the **Administration** menu > **System Administration** button > **Logged on users** section



Click the **"Allow all logins"** button.

This will allow staff members, and the HelpMaster Services (Priority Manager, Email Manager, Automation Server and Active Directory) to log-back into HelpMaster.



The screen should now look similar to this.

The screenshot shows the "System administration - Logged on users" window. The title bar says "System administration". Below the title bar is a subtitle "System administration - Logged on users" and a description "Use this screen to view and manage user logons." The left sidebar contains a tree view with categories: "HelpMaster Configuration" (General, Business hours, Terminology, Default Templates, Auto assignment), "System Configuration" (Database, Working folders, Global email accounts, System Event Logs), and "User Management" (Logged on users, Staff Licensing, Logon settings). The "Logged on users" item is selected.

The main content area is divided into two sections. The top section, "Logged on users", contains two summary tables. The first table, "Licence types in use", has columns: Named (0/5), Concurrent (1/5), and CAL (0/∞). The second table, "Concurrent Staff licences", has columns: Used (1), Total (5), and Remaining (4). Below these is a table of logged-on users with columns: User ID, User Name, Licence type, Desktop, and Logon time (desktop). The table shows one user: EvansM, Matthew Evans, Concurrent, with a green checkmark in the Desktop column and a logon time of 15 secs ago. A "Refresh user list" button is to the right of the table.

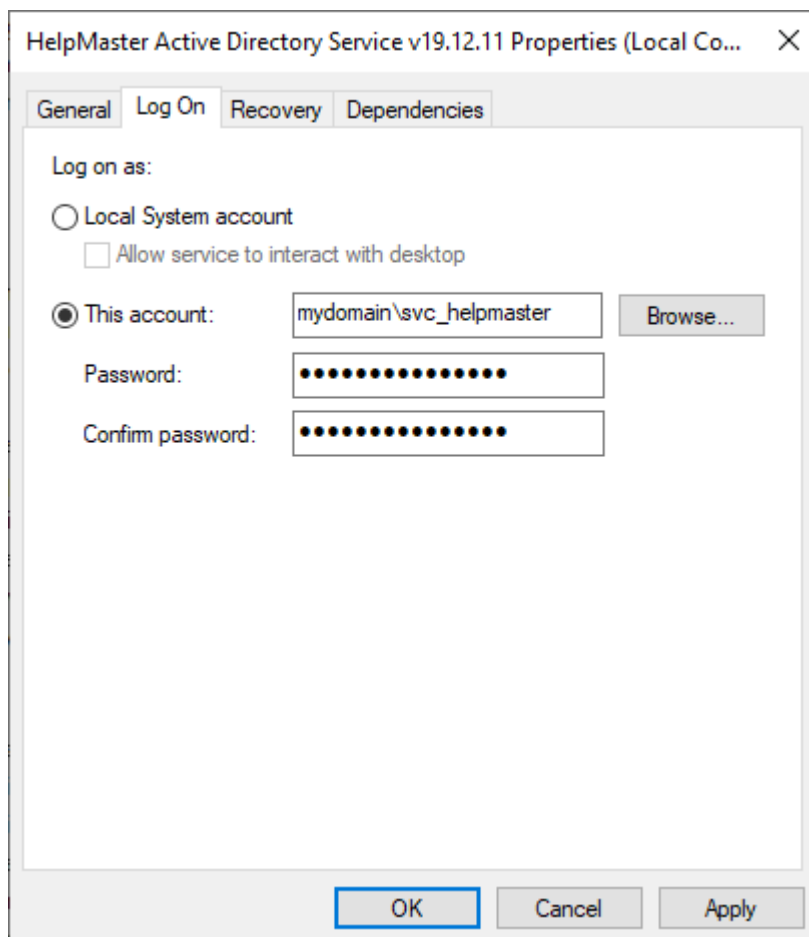
The bottom section, "User logon management", contains a description: "Use the settings here to force user logoff after a specified time, and set a date/time when logins will be allowed again. This option may be useful when performing system upgrades, database re-locations etc." Below this is a status indicator: "Logins are currently allowed" with a green checkmark. There are two settings: "Log off all users (including web users) in" set to "2 mins" and "Do not allow users to log back in until" with a date/time picker. A "Start Log off process" button is below these settings. At the bottom right are "OK", "Apply", and "Close" buttons.

## Step 7 – Configure the HelpMaster Services

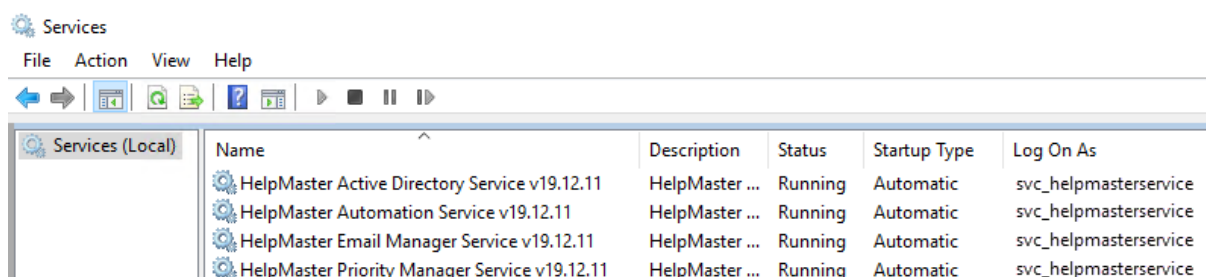
**IMPORTANT! Do step 6 (Allow Logons) first before continuing!**

Open the Windows Services screen and scroll to find the HelpMaster Services.

Double-click each of the HelpMaster Services and set the logon credentials to use your HelpMaster Service Account. See [Appendix A](#) for details about this account.



Do this for each HelpMaster Service. When all services have been updated, start them



## Step 8 – Check the event logs

The final step in upgrading is to check the HelpMaster Event Logs for the services to ensure that everything looks right and there are no errors or other issues being reported.

From the desktop edition, use the “**Automation**” menu and check the event logs for each of the services.

## Post upgrade considerations

Depending on which version of HelpMaster you have upgraded from, there may be significant updates to the product functionality, workflow capabilities, web portal and more. Here's a few things to consider.

### Learn about the new features

Check the version history to see which features are new or enhanced, and then read the helpfile to learn more about these features. The web portal, workflow and process and automation are common features that are developed between releases. If you haven't started using workflow yet, you may be in for a surprise to learn what HelpMaster can do for your processes.

Read the discussion board, the website and other on-line resources to learn more.

Online documentation is here: <https://docs.helpmasterpro.com/>

### Get training for your staff

PRD Software offer a range of professional services that include training, consulting, custom report development and more. If you sense that your staff can get more out of the product with some training, please contact PRD Software.

### Update reports

If you have developed custom reports, check that these are still running OK. In most instances custom reports should still work just fine. If you require assistance with custom reporting, please contact PRD Software.

## Roll-back / Revert to a previous version

Once an in-place upgrade of HelpMaster has taken place, there is no automatic “rollback” to a previous version. A rollback consists of uninstalling the current version, and then re-installing the previous version and restoring the database.

To revert to a previous version of HelpMaster, you will need to do the following:

1. Uninstall the current version completely from all machines. This includes desktop components, web components and services on the HelpMaster server machine
2. Restore the HelpMaster database to the backup taken before the upgrade. Use SQL Server Management Studio to do this.
3. Install the previous version of HelpMaster that you will to “rollback” to.
4. Install a new instance of the Web Portal on IIS
5. Configure the HelpMaster Services to use the HelpMaster service account



## Appendix A – The HelpMaster Service Account

### Overview

The HelpMaster Service Account is a Windows account that is used to access and run various HelpMaster resources and services. It is **highly recommended** that you create a new, dedicated Windows account and name it “**svc\_HelpMasterServiceAccount**”, or something similar according to your organizations naming convention for service accounts.

The following table gives an overview of the *required permissions* for this account.

#### SQL Server Database



Requires read/write and execute access to the HelpMaster Microsoft SQL Server Database. See Appendix B (needs to be added?) for the specific SQL Server permissions

#### Network “working folders”



Requires read/write or modify access to network shares. These “working folders” are used to store attachments, reports, themes, email and other HelpMaster resources.

#### Email Accounts



Requires email access to all email accounts that will be scanned and processed for email-to-ticket conversion. Also requires “send on behalf of / send-as” permission for each account.

#### Web Portal



The HelpMaster web service account must be a member of the **IIS\_IUSRS group**. Used as the IIS Application Pool Identity account that will be used to run the HelpMaster web portal.

#### Active Directory user import / synchronization and Single-Sign-on



The HelpMaster service account requires access to connect to, and enumerate your Active Directory OU structure in order to import and synchronize users.



### HelpMaster Services

HelpMaster installs 4 Windows Services that are used to deliver functionality. The HelpMaster service account will be used to run each of these services. See [Appendix B](#)



### General Windows Permissions

The HelpMaster service account requires the following:

- Must be a local administrator on the machine running the HelpMaster Services. (Email Manager, Priority Manager, Automation etc.)
- The ability to create, read and write Windows Event logs

## Appendix B – The HelpMaster Services

### Overview

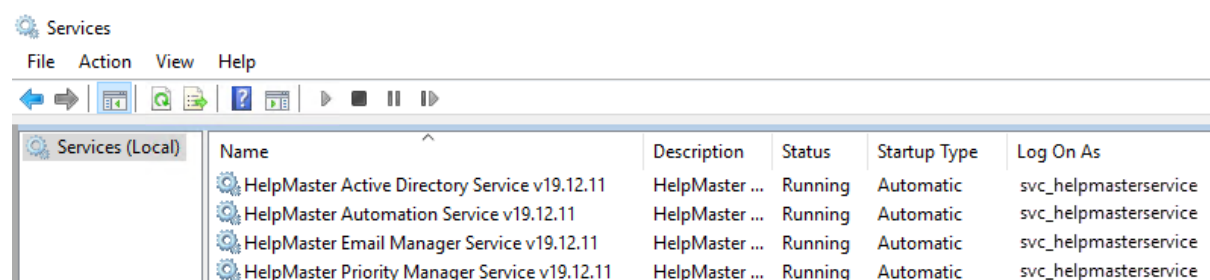
In order to provide background functionality, HelpMaster relies on 4 Windows Services that must be installed, started and running within the correct security context in order to provide the functionality for that feature.

These services are installed with HelpMaster. The 4 services are:

- **HelpMaster Active Directory Service:** Used for synchronizing Active Directory Users with HelpMaster Clients
- **HelpMaster Automation Service:** Used to run Triggered Event Profiles
- **HelpMaster Email Manager Service:** Used to run Email Manager profiles for the conversion of Email into HelpMaster jobs.
- **HelpMaster Priority Manager Service:** Used to run Priority Manager profiles

These services should only be installed on the “HelpMaster Server”, or another “server” class machine. They should not be installed on desktop machines, or user machines. Once started, they will continue to operate and provide the functionality that they have been designed for.

Each service needs to run/log on as the “HelpMaster Service Account”. See [Appendix A](#)



Each service will write event logs to the HelpMaster database, as well as the Windows Event Log.

It is recommended that each service is configured for an “Automatic” startup type. This means that if the server/machine that they are running on is rebooted, these services will automatically start when the machine starts. This can also be set to “Delayed Start” as required.

## Appendix C – Working folder file paths

The HelpMaster working folders are a set of network folders that are used to store files and other resources that HelpMaster requires during operation. Each user of HelpMaster will require read and write access to these folders.

The **Working Folder locations** tab, defined from **Administration** (ribbon) > **System Administration** (icon) > **Working folder locations** (tab), allows the system administrator to browse to the directories where the different HelpMaster network resources are located.



### Reports path

This is the network location where all of the HelpMaster Crystal Reports files are stored. These are .rpt files. This location should be accessible to all users of the HelpMaster Desktop edition.

### Custom reports path

This is the network location where you store any custom Crystal Reports files (.rpt) that you have created to work with HelpMaster. This location should be accessible to all users of the HelpMaster Desktop edition.

### Attachments

HelpMaster supports adding file attachments to all major entities. In order to provide multi-user access to these attachments, HelpMaster will copy all attachments into the folder path specified here.

### HTML Images

Whenever a graphic or any other file is embedded within a HTML-style Email template or Knowledge Base article, HelpMaster will store the file in this location.

### Themes

Themes files allow HelpMaster to be "skinned" with different colours. Use this location on your network to store common HelpMaster theme files. See also Theme Builder

### Email Manager email folder

For use with the Email Manager. Each Email Manager Profile has an option to attach a copy of the email that was processed to the Attachment section for a job. When this option is used, this is the

network folder that will be used to store the email file. When an email is attached to a job, the Email Manager will convert it to an .msg file and store it in this location

## **Configuration**

The working folders of HelpMaster *should always be a networked location that is accessible for every user using HelpMaster.*

When setting the location of the folders in HelpMaster, it is vital that that UNC paths ([\\servername\sharename\....](#)). are used, rather than mapped network drives. To specify a UNC path, browse through the "Network Neighbourhood" option to find your network resource. This is required if you are using the HelpMaster web interface, you will need to set these folder paths using a full UNC path

## **Re-locating the Working Folders**

If ever the working folder are re-located, it is necessary to update the path that HelpMaster stores within the administration screen

## **Network Security**

It is vital that every user of HelpMaster has sufficient network permission to access the content within each of the folders specified in this screen. Each user will require read and write access to these folder locations.

## **Using other HelpMaster products / modules**

The working folders are a core-part of the operation of all HelpMaster modules. When configuring the Email Manager, the Priority Manager and the Web Interface, it is vital that these products (specifically the network account running these products) has read and write access to the working folders.

## About HelpMaster

HelpMaster helps businesses of all types and sizes deliver outstanding client support and service. Build business processes to log, track and manage customer issues. Assign each job to the appropriate staff member and build flexible rules to ensure that each ticket is handled in a timely, appropriate manner.

HelpMaster automates the entire service delivery lifecycle and ensures that nothing slips through the cracks. Windows or Web, HelpMaster gives your team the tools to focus on the issues that matter most to your customers.



## PRD Software Professional Services

PRD Software offers a range of professional services that cater to the helpdesk and service management industry. Professional services include consulting, training and all technical aspects of our ITSM solution, HelpMaster. Our hands-on approach to professional services delivers tangible business value with an emphasis on actionable, practical guidance that will yield immediate results.

PRD Software has over 25 years of consulting experience with business around the world that run helpdesks of all shapes and sizes. PRD Software consultants love making helpdesks run better!

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

## About PRD Software

PRD Software is a privately owned, Australian software company that specializes in helpdesk and service management solutions and services. Based in Canberra, the nation's capital, PRD Software develop the HelpMaster range of software solutions that are used around the world.

Our sole purpose and passion is to develop and deliver the best service management software and support available. PRD Software is a Microsoft partner and proudly bear the "Australian made and owned" logo.



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