

TOTAL SUPPORT HELPDESK

DATA CONVERSION GUIDE



Software Solution for All Your Customer Service Needs

From Sales to Support
From Inception to Resolution

Stand Alone CRM (Built-in Contact Manager)

or

Integrate with Act! Contact Manager
(restriction apply)

Or

Any Contact Manager using the ADO/OLEDB driver

Revised January 9, 2023

IMPORTANT

Since so much time has passed since version 5.2019 ended, some areas of the old code are no longer supported, which may cause some issues. We have noted those issues so you are aware before you begin.

This data conversion was designed with Total Support HelpDesk **version 5 build 2019**. If you are on an older build, the data may not convert.

This data conversion utility is delivered 'as-is'. Because of the massive changes from version 5 to version 6, and the unknown of what changes users may have made to the version 5 database, or what condition the database is in, we cannot guarantee 100% conversion success.

Total Support HelpDesk version 6 is delivered with an SQLite database format.

Total Support HelpDesk version 6.x is delivered with an annual subscription license. The license will expire the last day of the month your contract expires. Once renewed, a new license will be issue.

IMPORTANT many of the libraries used in the older version of helpdesk are no longer supported and therefore LINKS may not convert or will not convert correctly. To resolve this issue, we will leave your EMAILS and LINKS in the existing 'shared' folders. The upgrade must be done with exclusive access to the licensed location of your HelpDesk5. Moving HelpDesk5 will only cause issues. If you do not have network access to version 5, then do NOT run this conversion.

TEMPLATES will not convert correctly. This entire feature was rewritten because the libraries used in this section are no longer available, making it impossible to access the code and convert correctly.

HOT TIP images will not render correctly and you will need to re-add your images.

CUSTOM REPORTS will need to be recreated since the database is now SQLite format and point to a new data source.

- MUST remap the Stand Alone contact fields and update any contact fields you have mapped to center views.
- Users who were unable to be identified as being a user in the application will have (Deleted) after their name. This is a place holders for users and SHOULD NOT be removed. You can edit them and change the deleted to something else, but please do not delete them as this will cause access violations in your application.
- Once the conversion is completed, you will need to map the shared PostOfficeBoxes in Configuration > Advance Settings. Please be sure the paths are UNC. If you move the folders to a new location, be sure it is a 'shared' location and update the mappings
- Each time you run this utility it will overwrite all data in the TSHD.db3 (HelpDesk database). So, you can run this often while learning.

This guide is designed for Administrators

System Requirements

- Full Operating System 64-bit
- 8 GB RAM recommended minimum (workstations)
- 12 GB RAM recommended minimum (servers)
- 500 MB available disk space (server and workstations)
- 3 GHz minimum (4 GHz recommended)
- Server and Client's:
 - Server 2019 + Standard or Data Center
 - Server 2016 Standard or Data Center
 - Windows 11 (non-home)
 - *Windows 10 (non-home)

*When using Windows 11 or 10 operating system as your server, all USERS need to be ADMIN users and you need to disable the UAC (user account controls) for each user. Check your Microsoft EULA as to the number of .CAL licenses you have available for your version of Windows 10. You will need 1 .CAL license for each User to connect. You are responsible for verifying and complying to Microsoft's User License Agreement for Windows 10.

IMPORTANT: For multi-user access, we strongly recommend a SERVER O/S.

Total Support HelpDesk server files requires a full operating system to function correctly. Includes desktop client install and optional remote access via VPN. And, if you are using iOS, Android or Chromebook for your client, you can use GO-Global to web enable your company applications for mobile device access. Check out more details and pricing from our website:

<https://www.resource-dynamics.com/goglobal.html>

CONTACT MANAGER COMPATIBILITY:

- Stand Alone CRM (built-in contact manager)
- Act! PREM or WEB version 18.2 & newer using Act! Connect. Requires users to have active Act! Subscription to utilize the Act! Connect Link for Add-ons.
- Any Contacts Database using ADO/OLEDB Driver

TELE-SUPPORT HELPDESK VERSIONS **NO LONGER SUPPORTED:**

Version 2019 EOL ended Dec 2021 – upgrade at user’s own risk as stated above

Version 5.1. EOL ended July 2021 – upgrade at user’s own risk as stated above

Version 5.0 EOL ended July 2017 – no upgrades available

Version 4.1 EOL ended February 2013 – no upgrades available

Version 4.0 EOL ended February 2010 – no upgrades available

Version 3.x EOL ended April 2008 – no upgrades available

Version 2.x EOL ended Sept 2005 -no upgrades available

Version 1.x EOL ended June 2002 – no upgrades available

ABOUT THIS UPGRADE

This is an optional data conversion utility. If you have an active contract, we will provide this utility at no cost.

We will provide you with an installation code and activation instructions via a private email. Please be sure that our domain is on your white/approved recipient list.

This upgrade will attempt to convert your existing HelpDesk Access or SQL database to the new SQLite database format.

Before you begin the upgrade process, please complete a full compact/repair/maintenance on the database. If you are connecting to an external contact manager, please complete a repair/rebuild to the database configured with HelpDesk.

Make a SAFE full backup of your HelpDesk database.

REMEMBER TO:

BACKUP your current HelpDesk5.mdb or HelpDesk/HelpDesk3.mdf to a safe location in the event you need to restore

REPAIR your database using MS ACCESS or SQL Utility to ensure the database is clean.

EXCLUSIVE access when running the upgrade. All users and add-on utilities (publishers and scheduler) must be closed. Clear all *.lck (locks) from your \server and \server\users folder.

RUN this upgrade on the computer containing the current HelpDesk version 5.2019.x database or on a computer with network access.

LET'S GET STARTED!

Upgrading version 5.2019 data is optional. If you have an 'active' care plan, you are eligible to receive the upgrade utility for free. This is a separate utility and not included in the main install. You must request the utility and then place/save the two files into the main \Utlis folder.

The Upgrade must be ran on the same host server as your version 6 with access to your version 5 database.

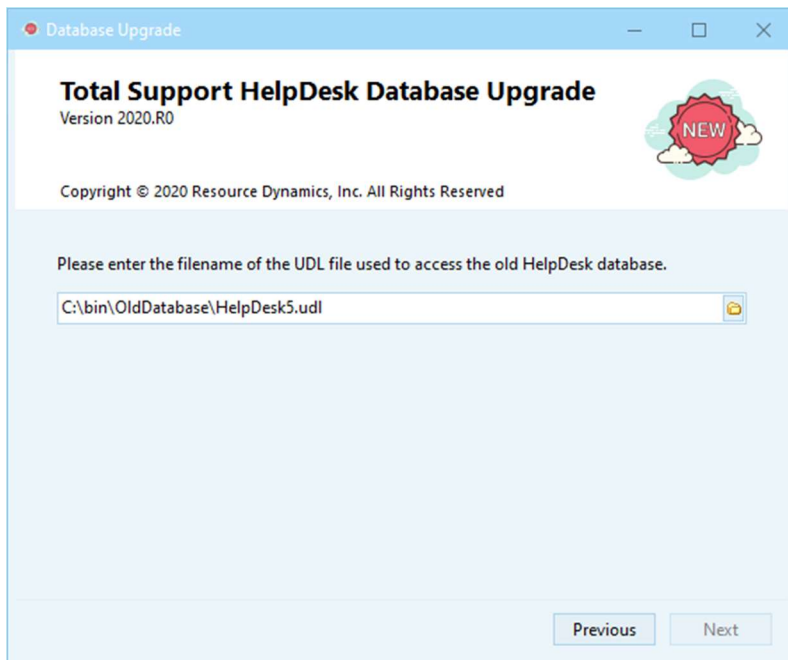
As an active existing HelpDesk User for either Access or SQL database version 5. 2019.0.0.x, you will run the upgrade executable TSHDDBUpgrade.exe. The upgrade is wizard driven, just follow the prompts.

Version 6 must already be installed and you must be on the that version 6 server to upgrade and have exclusive access to both version 5 and version 6 HelpDesk. If you started the service during the install process, please stop it. If the service will not stop, you can run a command prompt as ADMIN user as follows:

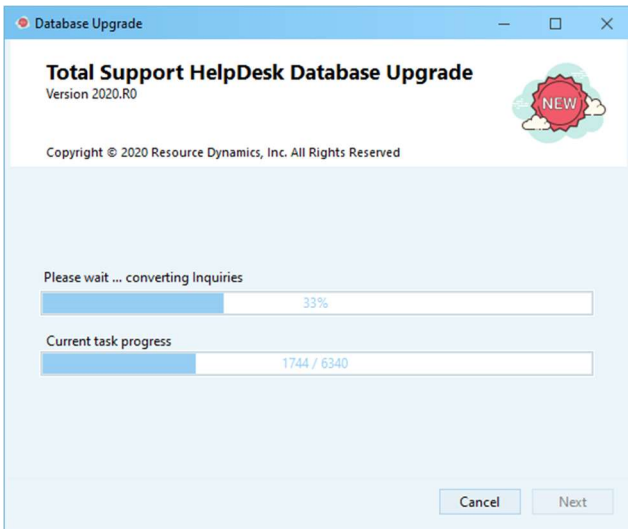
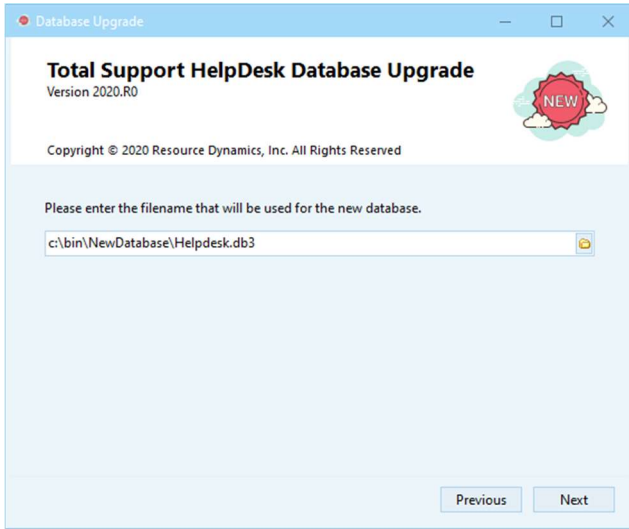
```
C:\>taskkill /im tshddb.exe /f
```

Now let's start your upgrade...

Browse to the main \HelpDesk\Utils folder. Select the TSHDDBUPgrade.exe



The database is stored in C:\Users\Public\Documents\HelpDesk\Database. The default is TSHD.db3.



Once this is completed, please run the TSHDDAttachmentFix.exe. This will sweep through your links one more time to be sure the links are readable.

IMPORTANT: If someone has modified any fields and/or tables, the conversion process will attempt to correct and continue. However, if not, it will display the table and the field name in the old database that needs to be corrected. We have found through testing that it is usually the field size that people have changed. You will need to end task on the conversion process, correct the field(s) to the correct field size indicated in the message displayed and then start the conversion run again.

During our testing, we found 1 database with 25 field changes that we had to stop and correct the field and restart the conversion 25 times! This part is time consuming; so, if you are aware of changes, please give yourself additional time to run through the conversion process.

Once the database is completed you are almost ready to go. There are two more files you need to run. From the new server C:\Users\Public\Documents\HelpDesk\Database, run the MOVEIFLES command. Must run as Admin (right click run as Admin user). Then you need to run the TSHDDBAttachmentFix.exe. This will ensure that the paths match up.

Please remember to go into Configuration > Contact Manager > Contact Manager Field Mappings and remap your fields in both your contact manager layout and center view designer is applicable.

If you are connecting with Act! CRM, please be sure that the Act! Connect is activate on ALL workstations and host server, and you have installed the HelpDesk Act! CMLINKs on ALL workstations and host server.

Please see Admin Guide for more information on configuration and using Total Support HelpDesk version 6.