

## ServiceDesk 7.1 Installation and Upgrade - Using Domain Service Credentials – A Step by Step Guide

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### Overview

**Notes in Yellow and Green Highlights are from me as I was going through this upgrade in addition to the instructions from Symantec. These notes are from an end user installing a fresh install of Service Desk 7.1**

**Have Fun! SM**

This guide is designed to step the reader through installation or upgrade of the Symantec ServiceDesk 7.1 product using a domain based service account. This guide also has details and can be used to install the application using either a locally installed version of Microsoft's SQL Server, or an SQL install on a separate server.

Please read the steps that are contained in this guide prior to performing the installation so that you can familiarize yourself with the procedure. Depending on your required process (new installation or upgrade), please follow the appropriate steps precisely. Deviation from the steps and process in this document may result in an unusable or failed installation.

Please make certain the pre-requisites are met before proceeding. Upgrading from 7.0 MR2 to 7.1 is the only supported upgrade at this time. To access and review known issues with documented solutions and related documentation for Workflow Solution 7.1 go to <http://www.symantec.com/docs/HOWTO42147> in the Symantec Knowledge Base on Symantec Connect.

To access and review known issues with documented solutions and related documentation for ServiceDesk 7.1 go to <http://www.symantec.com/docs/HOWTO42148> in the Symantec Knowledge Base on Symantec Connect.

**Have a copy of Symantec™ ServiceDesk 7.1 SP1 Implementation Guide open also.**  
<http://www.symantec.com/docs/DOC3929>

## ServiceDesk 7.1 Server Installation Pre-requisites

**NOTE:** ServiceDesk is not designed to run on the Symantec Management Platform (SMP) server. The ServiceDesk server must be installed to a separate server in the same domain as the SMP server.

- Symantec Management Platform 7.1
  - NOTE: Support can provide a work-around to implement in SMP 7.0 environment but this is not recommended.
- Hardware
  - Multi-core processor(s)
  - 4GB RAM minimum
    - 16GB RAM recommended
  - 50GB Disk minimum
- Operating System
  - Windows 2008 X64 or Windows 2008 R2 (X64)
    - CAUTION: Do not load any Windows Service Packs prior to the ServiceDesk installation.
  - Server joined to the same domain as the SMP 7.1 Server.
- Network Configuration
  - IP V4
  - Static IP Address
  - Name resolution services (DNS)
  - Internet connectivity
  - Connectivity to the SMP server
  - GB NIC
- Database instance
  - MS SQL 2005 or 2008
    - MS SQL 2008 R2 (X64) recommended
    - Analysis services (optional)
  - GB NIC
  - Located on same subnet as ServiceDesk server
    - NOTE: This is optional but highly recommended.
  - “On-box” or “off-box” SQL instances supported.
  - SA rights to the DB instance are required for installation.
- Domain Accounts ---**VERY IMPORTANT-The difference is that the Service Account is the one that you will be using going forward as your Administrator Login ID**
  - Installation Account
    - Domain Account with SA rights to the DB instance and administrator rights to the new ServiceDesk server
  - ServiceDesk Services Account (Domain account with SA rights to the DB instance.)

- E-mail account
  - Primary e-mail account for the ServiceDesk mailbox for monitoring and sending e-mail from the system.
  - SMTP server connectivity
  - POP or IMAP mailbox for monitoring (optional)

## ServiceDesk 7.1 Server Installation and Upgrade Procedure Instructions

Please note that the steps for installation and upgrade assume a new Servicedesk Server. This is not an in-place procedure. Also note that the steps are the same until Step 47, at which the installation process continues. See Page XXXX for the remaining steps to complete an upgrade.

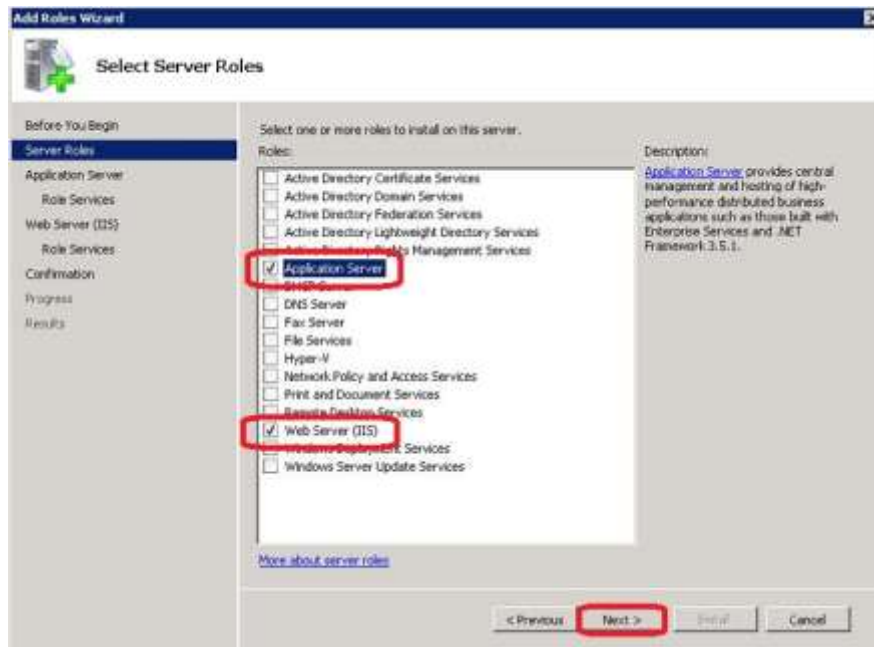
### SERVER ROLES, FEATURES & WEBSERVICES SETUP

**CAUTION:** Follow very closely the steps listed below and do not skip or change the order of any steps. Doing so may result in an unsuccessful install.

- 1) Login to the server with the **Installation Account. --- Not the SERVICE ACCOUNT**
- 2) From the Initial Installation Tasks, Windows 2008 UI, select **Add Roles**.



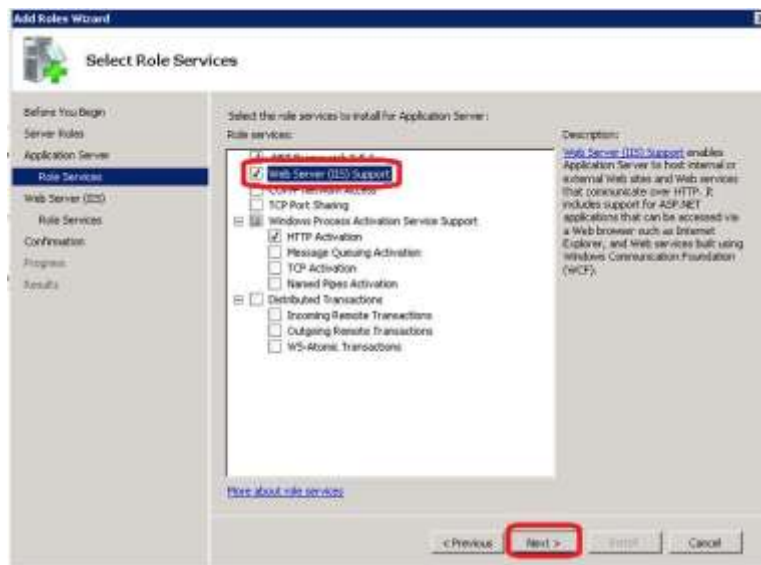
- 3) In the Select Server Roles, Windows 2008 UI, select **Application Server** and **Web Server (IIS)**. Then click **Next**.



- 4) When prompted to **Add features required for Application Server?** Click **Add Required Features**.



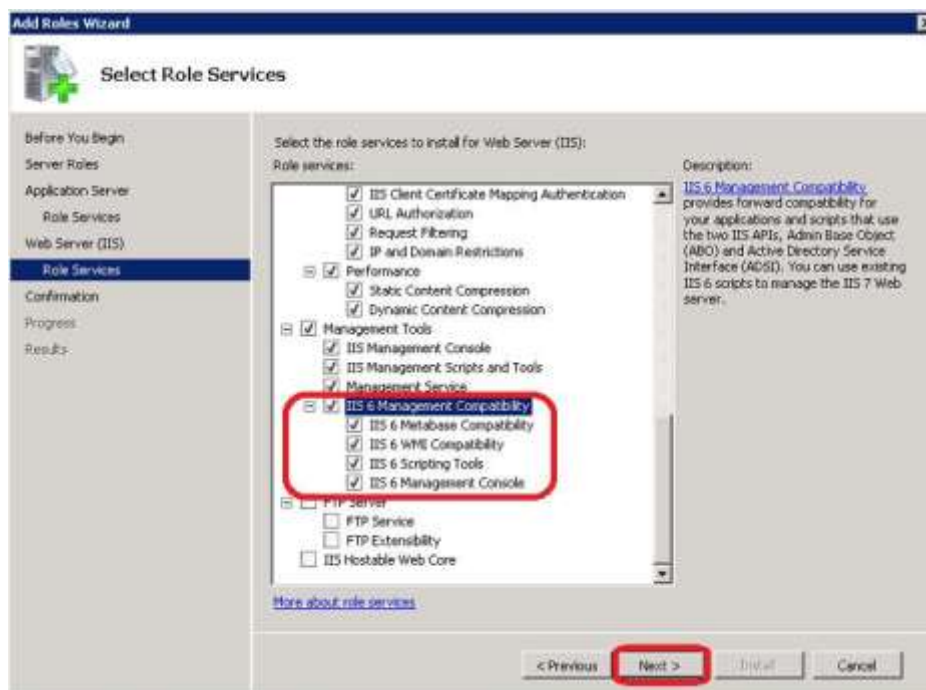
- 5) In the subsequent Add Roles Wizard UI for **Select Role Services**, select **Web Server (IIS) Support** and click **Next**.



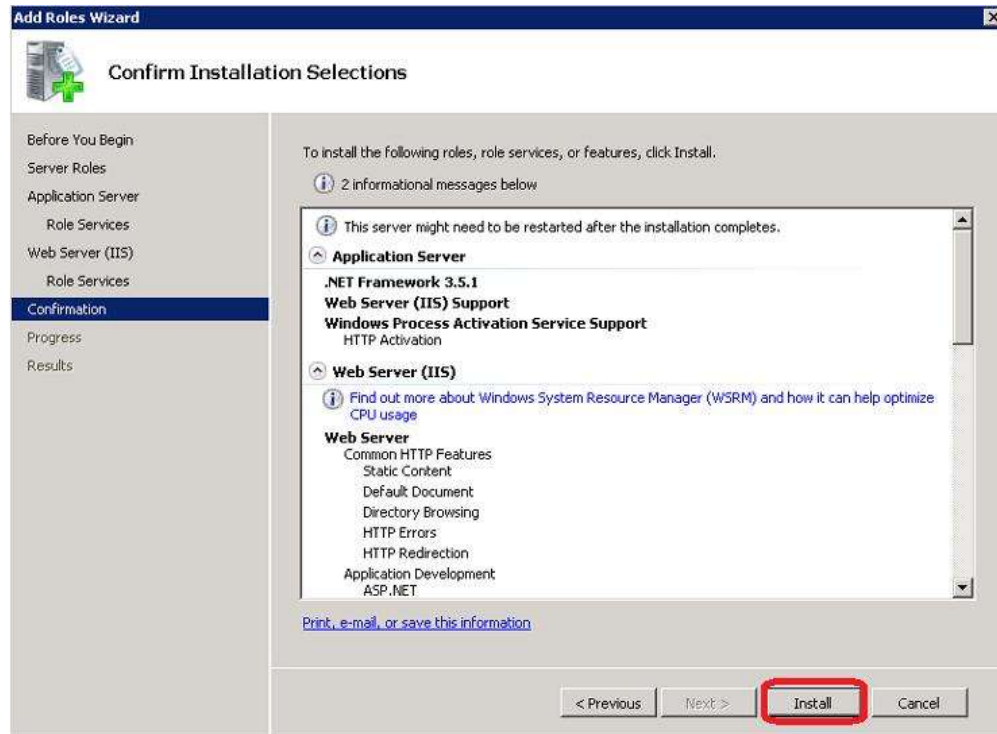
- 6) When prompted to **Add role services and features required for Web Server (IIS) Support?** Click **Add Required Role Services**.



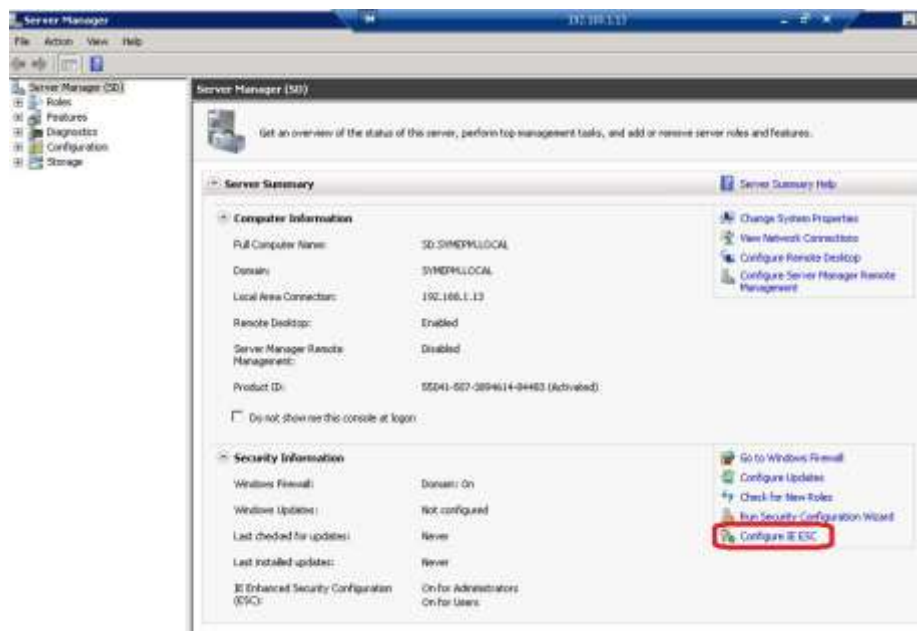
- 7) Continuing through the Add Roles Wizard, on the **Select Role Services** page, add **IIS 6 Management Compatibility** and make certain all subcomponents of the role service are selected before clicking **Next**.



8) On **Confirm Installation Selections**, click **Install**.

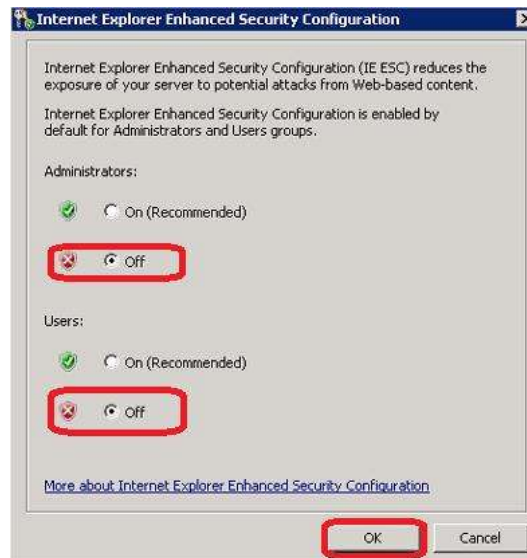


9) Launch the Windows 2008 **Server Manager** and verify that the root node in the left pane of the UI is selected. Then click **Configure IE ESC** in the right pane of the Server Manager UI.

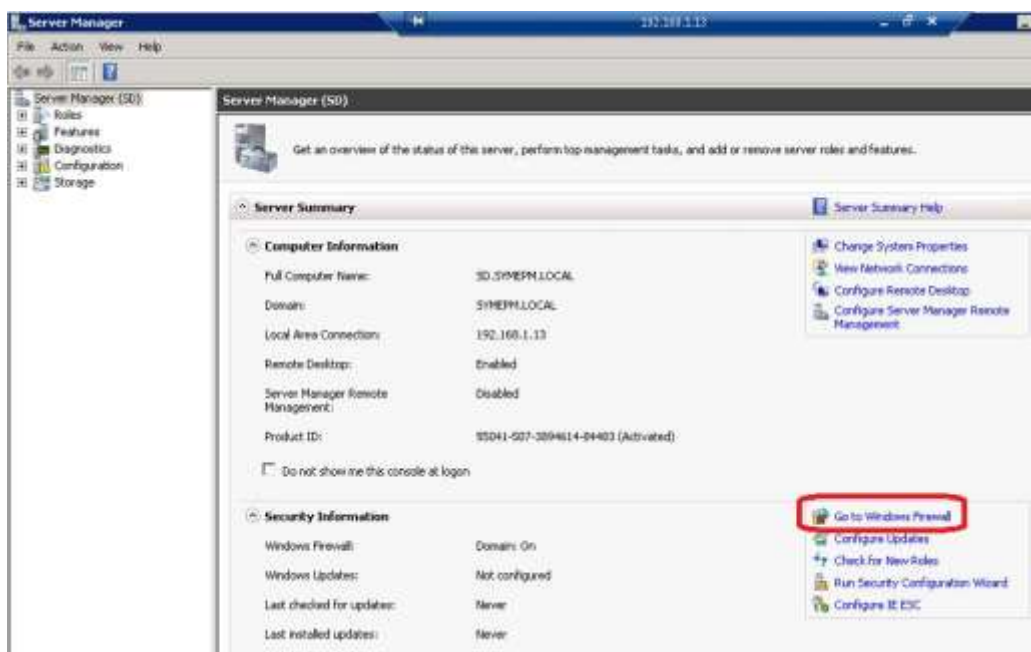




- 10) When presented with the **Internet Explorer Enhanced Security Configuration** interface, select the **Off** radio button for Administrators and for Users (turning off this setting for users is optional and has no bearing on the installation process but is recommended).



- 11) In the Windows 2008 **Server Manager** UI, verify that the root node is selected in the left pane. In the right pane, click **Configure Windows Firewall**.

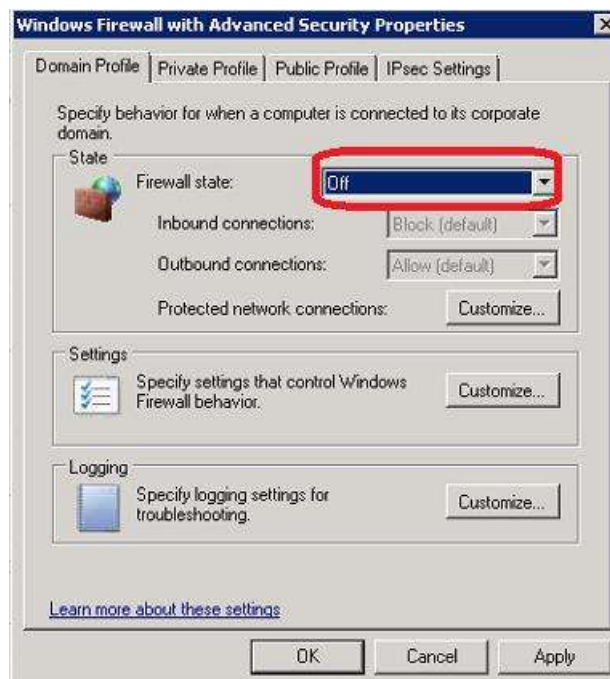




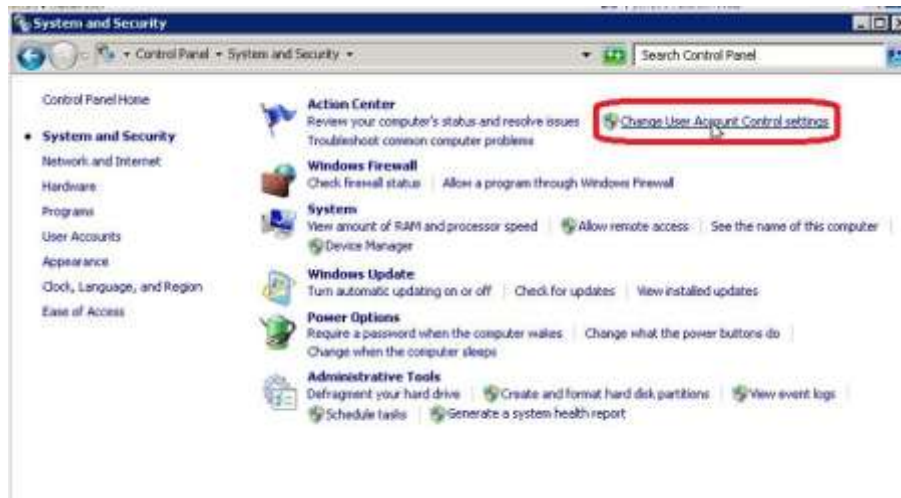
- 12) When presented with the **Windows Firewall with Advanced Security** interface, click **Windows Firewall Properties**.



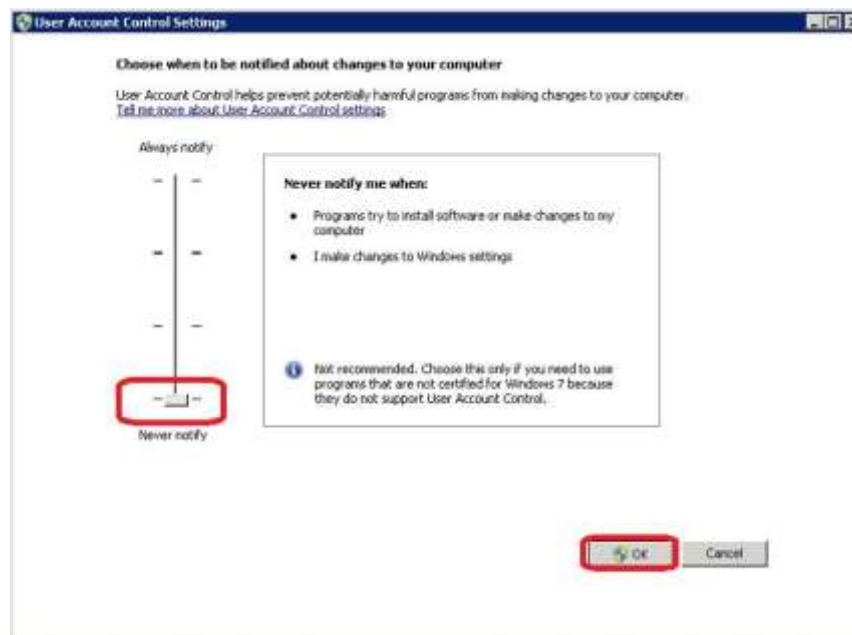
- 13) When the **Windows Firewall with Advanced Security** properties configuration UI presents to the screen, turn **Off** the **Firewall State** for the **Domain Profile** using the available drop-down menu and then click **OK**.



- 14) From the **Windows Control Panel** launch **System and Security** and then click **Change User Account Control Settings**.



- 15) Move the slider all the way down to **Never Notify** and then click **OK**.

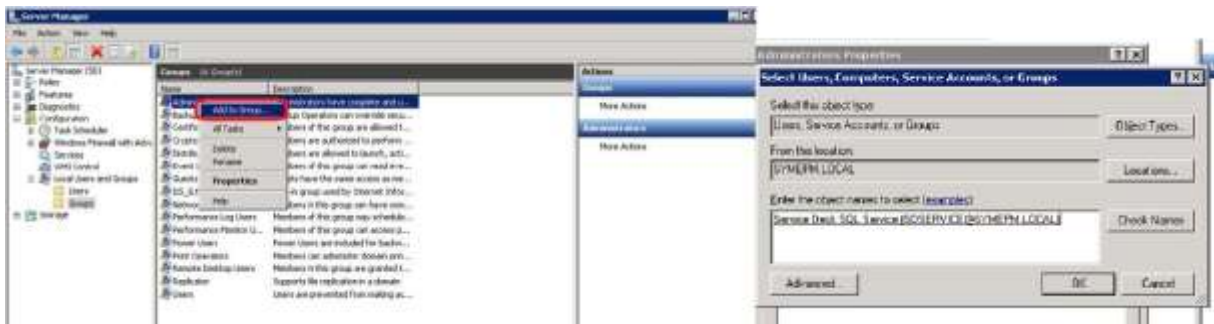


16) If the SQL Server Instance is not on the same server as the ServiceDesk installation, install the following components on the ServiceDesk server (not the SQL Server, unless SQL is installed on the ServiceDesk server), which are required before install. These components are from the [Feature Pack for Microsoft SQL Server 2005 - December 2008](#) or newer.

**Note:** Any other versions are not supported.

- [sqlncli x64.msi](#) - Microsoft SQL Server Native Client (from December 2008)
- [SQLServer2005 ADOMD x64.msi](#) - Microsoft SQL Server 2005 Analysis Services\_ADOMD.NET (from December 2008)
- [SQLServer2005 XMO x64.msi](#) - Microsoft SQL Server 2005 Management Objects\_Collection (from December 2008)

17) Launch the Windows 2008 **Server Manager** and drill down to Configuration > Local Users and Groups > **Groups**. Add the **ServiceDesk Service Account** to the local **Administrators** group.



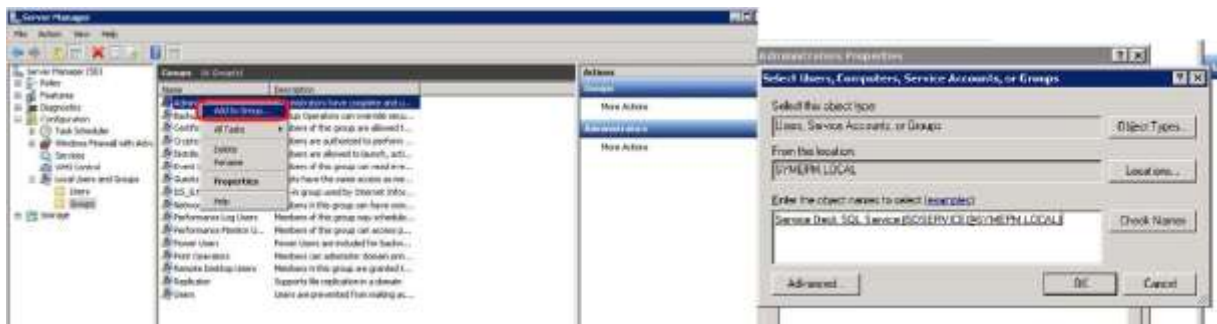
17A. Add the ServiceDesk Computer Administrators group (pg 54 ServiceDesk 7.1 SP1 Implementation) to the Local Administrators group

- 1 In the **Administrators Properties** dialog box, click **Add**.
- 2 In the **Select Users, Computers, or Groups** dialog box, click **Object Types**, and then if you are prompted, enter your network password.
- 3 In the **Object Types** dialog box, click **Computers**, and then click **OK**.
- 4 In the **Select Users, Computers, or Groups** dialog box, in **Enter object names to select**, type the domain name and the name of the ServiceDesk server computer as follows: **domain\host-name**
- 5 To verify that the name resolves correctly, click **Check Names**.

*In my environment check names removed the Domain/Host-Name format I typed in the Domain/Host-Name*

6 If the test is successful, click **OK**.

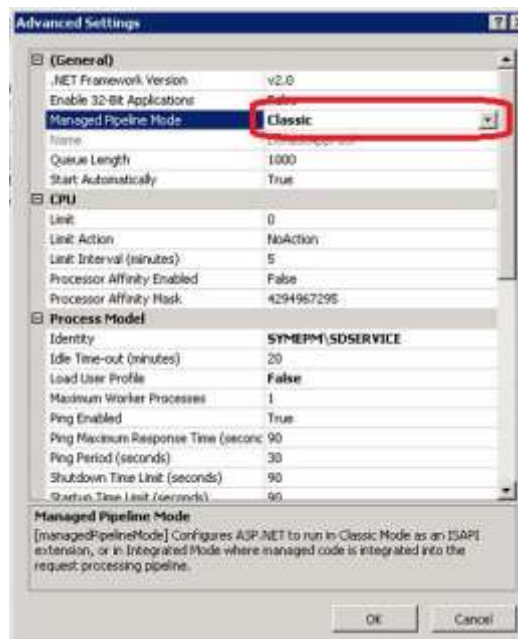
7 Close the **Computer Management** page.



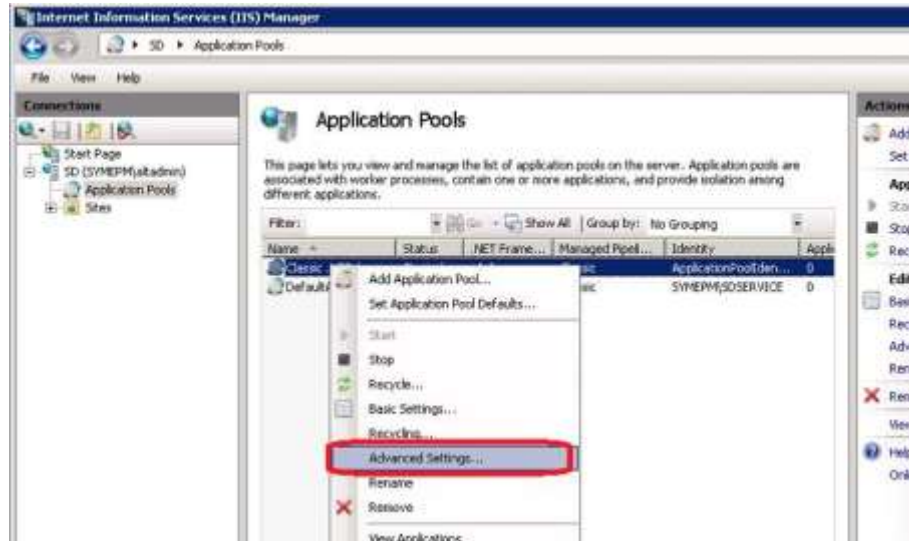
19) Change the Default Application Pool **Identity** to the **ServiceDesk Service Account**.



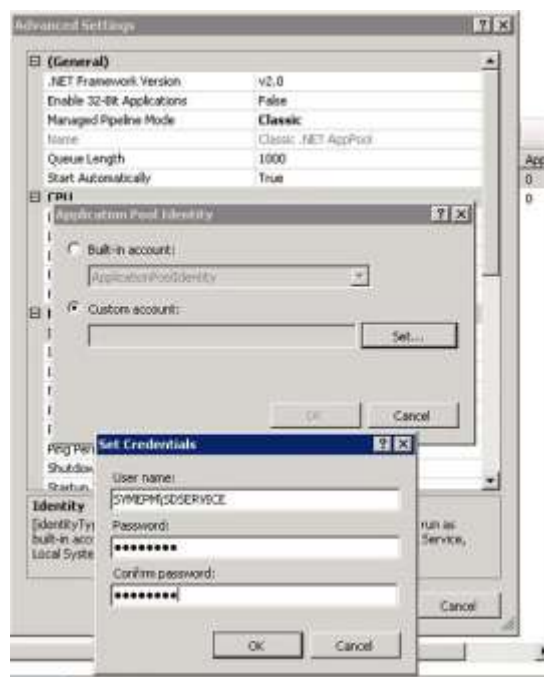
20) Change the Default Application Pool, **Managed Pipeline Mode** to **Classic**.



21) Access the **Classic AppPool, Advanced Settings.**



22) Set the **Classic AppPool Identity** to the **ServiceDesk Service Account**.



**23) Reboot the server. STOP REBOOT the server to reset security rights**

24) Login to the server with the Installation Account.



# ServiceDesk 7.1 Installation and Upgrade

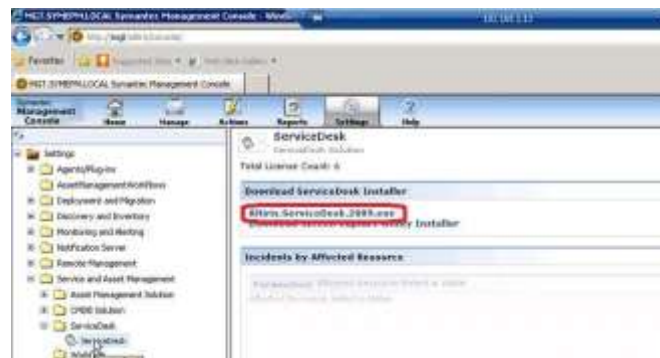


## SERVICEDESK INSTALLATION PROCESS

25) Browse to the SMP 7.1 Server using Internet Explorer – Service desk Solution must be installed through the SIM to the SMP installation. This is needed to manage the licenses



26) In the SMP UI, click **Settings > All Settings** and then drill into the **ServiceDesk** settings. Click **Altiris.ServiceDesk.2009.exe** to download the file. Save the file to the desktop of the Server that will be hosting Service Desk. In my case this was my SQL server that only does Service Desk and Workflow



26A. While you're on the SMP server add the service account or Installation account that will be used in Step 33 to the Symantec Administrator account.

- In the SMP Altiris Console, click on **Settings > Security > Roles**.
- Click on the **Symantec Administrators** group.
- Add the Service Desk account or Installation account to the group
  - If this is not done the Workflow license for Service Desk will not work

27) Execute the file downloaded in step 26 on the Server that will be hosting Service Desk.

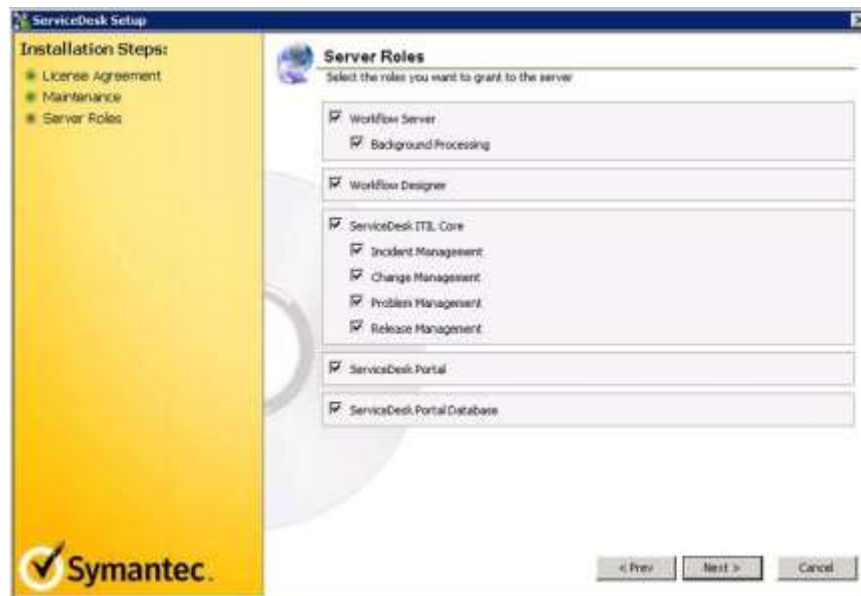
28) When the installer comes up, select **New Install** and select **Show Advanced Settings** before clicking **Next**.





## ServiceDesk 7.1 Installation and Upgrade

29) Select all components and click **Next**.



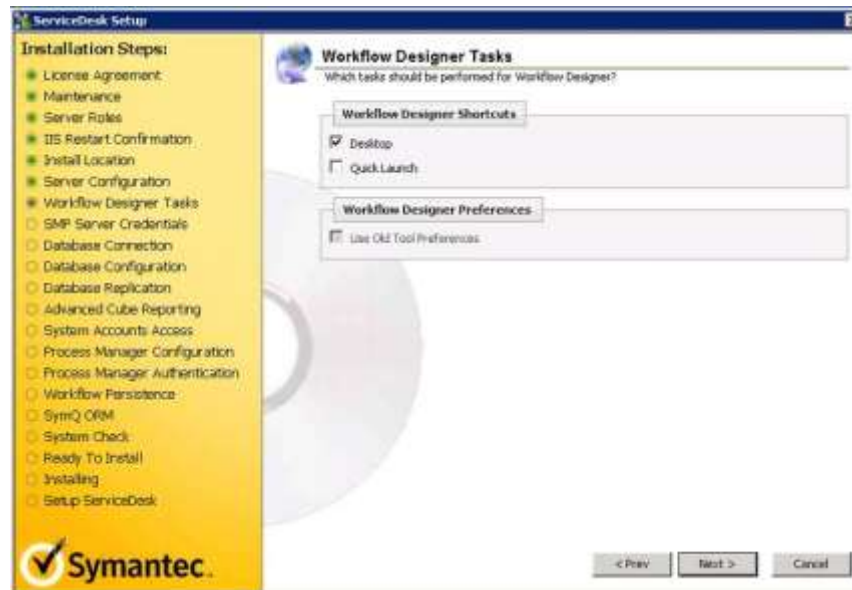
30) Click **Next** on confirm IIS Restart.



- 31) Set the Server Configuration for your ServiceDesk installation. Most leave the Web Site set to the Default Web Site. Set the Base URL to the address that you wish to use for ServiceDesk. You can use a FQDN, the IP address of the server, or just leave the NETBIOS equivalent as shown as the Base URL. Once you have completed, click **Next**.



- 32) Leave the Workflow Designer Tasks at defaults and click **Next**.



# ServiceDesk 7.1 Installation and Upgrade



- 33) Configure the **SMP Server Credentials**. Make certain the test is successful before clicking **Next**. Even if the SQL database for the SMP server is on the box that you are installing on, put in the Name or IP of the SMP server.

The screenshot shows the 'ServiceDesk Setup' window with the 'SMP Server Credentials' step selected in the 'Installation Steps' list on the left. The main panel is titled 'SMP Server Credentials' and contains the following fields and options:

- Default SMP Server:** A section with instructions to enter the SMP server name (IP, FQDN, or common name). The field contains 'MGT.SYMPN.LOCAL'.
- Domain:** A field containing 'SYMPN.LOCAL'.
- User name:** A field containing 'sa'.
- Password:** A masked field with '\*\*\*\*\*'.
- Use HTTPS:** An unchecked checkbox.
- Test:** A button to test the connection.
- SMP Connection Test:** A green checkmark icon and the text 'SMP Connection Test'.
- Navigation:** '< Prev', 'Next >', and 'Cancel' buttons at the bottom right.

- 34) Configure the **Database Connection** and verify that the test is successful before clicking **Next**. You can use an "sa" or equivalent account here if so desired.

**34A If you want to upgrade your existing SD7.0 install this is where you put in the path to the restored Ensemble 7.0 DB. Symantec does not recommend this. They suggest doing a clean install and migrate incidents and workflows after install**

The screenshot shows the 'ServiceDesk Setup' window with the 'Database Connection' step selected in the 'Installation Steps' list on the left. The main panel is titled 'Database Connection' and contains the following fields and options:

- Database connection:** A section with instructions to configure the Process Manager Database Connection.
- Data Source:** A field containing 'mgt.sympn.local'.
- Data Base:** A field containing 'ProcessManager'.
- Connect using:** Two radio buttons: 'Windows Integrated Security' (selected) and 'MS SQL Server Security'.
- User ID:** A field.
- Password:** A masked field with '\*\*\*\*\*'.
- Test:** A button to test the connection.
- Database Connection Test:** A green checkmark icon and the text 'Database Connection Test'.
- Navigation:** '< Prev', 'Next >', and 'Cancel' buttons at the bottom right.

## ServiceDesk 7.1 Installation and Upgrade

35) Review the database configuration (it is not recommended to make the database case sensitive) and then click **Next**.



36) If database replication is required, configure the database replica and click **Next**.

**CAUTION:** Database replication can adversely impact scalability and / or system responsiveness. Database replication should be directed to a separate SQL instance from the installation instance and the ServiceDesk Service Account requires SA rights on the target instance for the replica in order to install properly. Poor performance of the replica database WILL impact performance of the entire system.





37) Configure Advanced Cube Reporting only if Analysis Services are loaded to the SQL instance. If cube reporting is not desired or is not installed to the SQL instance, leave these fields blank. If cube reporting is desired and Analysis services are loaded to the SQL instance, configure the connection, verify that the test is successful, and click **Next**.



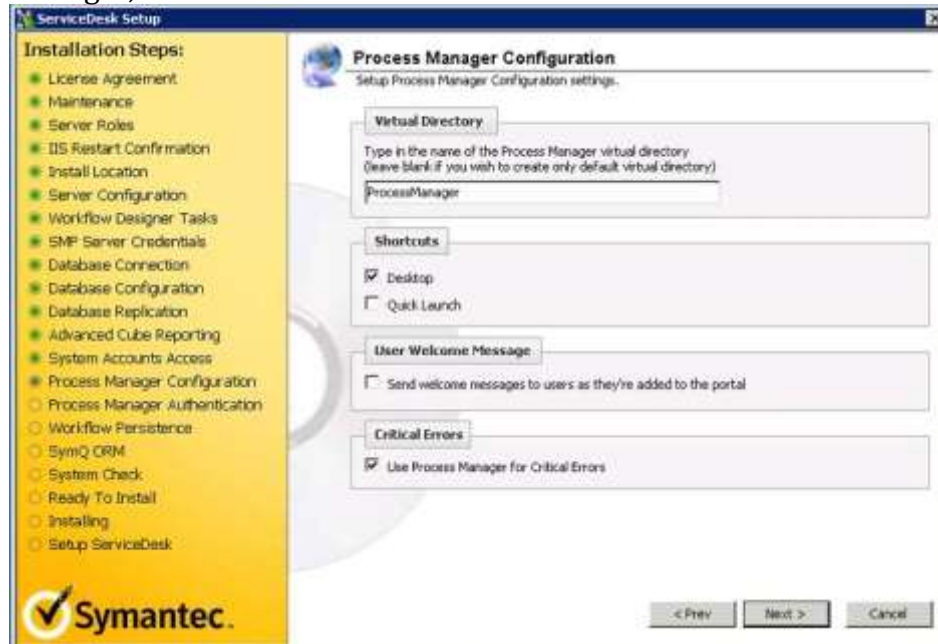
38) Configure **System Accounts Access** by **Removing checks from ALL items**. Then enter the **ServiceDesk Service Account** using **Domain\User Name** and use the **add** button to enter it in the list. Make certain **ONLY** the ServiceDesk Service Account is checked before clicking **Next**.

**The Install will fail if this is not done! You will have to detach and delete the DB tables to clear this. Plus Start over**



## 39) Review the **Process Manager Configuration**.

**NOTE:** At the time of this document, changing the Virtual Directory Name for Processmanager, will result in a failed installation.



## 40) Review the **Process Manager Authentication**.

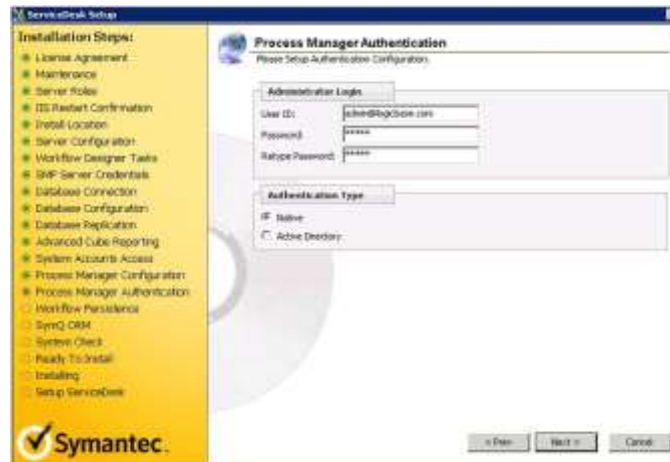
**NOTE:** At the time of this document, changing the Administrator Login password or name will result in a failed installation. If the administrator login password needs to be changed, this should be done after the installation is completed. [www.symantec.com/docs/TECH146586](http://www.symantec.com/docs/TECH146586)

**NOTE:** At the time of this document, selecting Active Directory for the authentication type may cause the installation to fail. If Active Directory Authentication is desired, this should be configured after the installation is complete. <http://www.symantec.com/docs/TECH148103>

**AFTER install** – log in as [admin@logicbase.com](mailto:admin@logicbase.com) PW admin, setup AD server, turn on AD Sync

1. Click on the **Admin** tab > **Portal** > **Master Settings**.
2. Open **Process Manager Active Directory Settings**.
3. Enable **Active Directory Authentication**.
4. Click on the **Save** button at the bottom of the screen.

Pasted from <http://www.symantec.com/business/support/index?page=content&id=TECH148103>

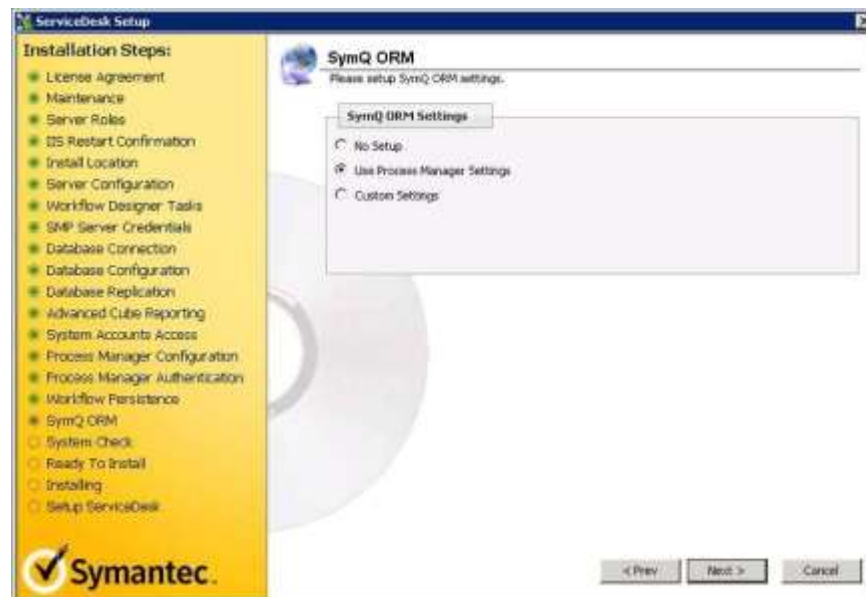


41) Review the **WorkFlow Persistence** settings. Do not make any changes. SQL persistence is desired and recommended for ServiceDesk. Click **Next**.





42) Review the SymQ ORM settings, leave at defaults and click **Next**.

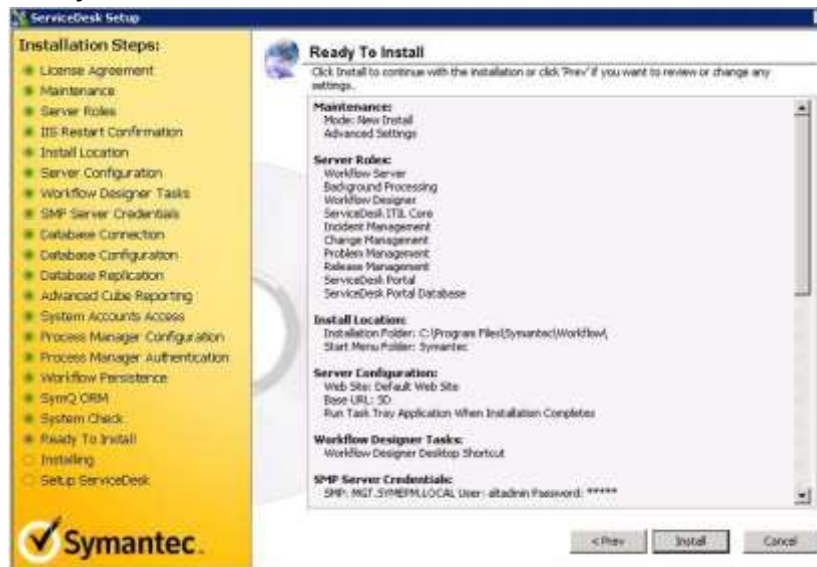


43) Review the System Check to make certain all tests pass and click **Next**.

**NOTE:** If any items need to be remediated, Cancel the installation, correct the issue, and then return to step 23 of this guide.



44) Review the summary and click **Install**.

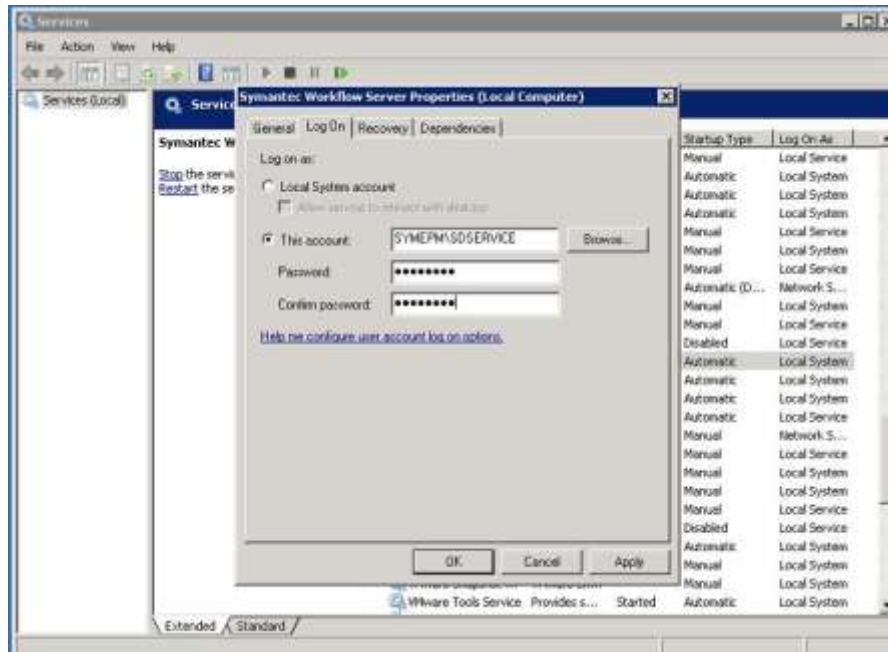


## 45) **DO NOT CLICK NEXT.**

NOTE: The Windows Service MUST be configured to use the ServiceDesk Service Account at this point. **Clicking Next at this point WILL result in a failed installation.** Which means detaching and deleting the ensemble and Process DB's. Leave the window open and proceed to the next step in this document.



## 46) Launch the Windows Services Control Panel and configure the **Symantec Workflow Server** service **Logon** to use the **ServiceDesk Service Account** and then **Restart the service**.



## TIMEOUT NOTE:

You may observe an error after the upgrade process begins. The error is a failure exception which references a timeout executing SQL script 952. There are transactions contained in this script that iteratively update the URL records in the TaskResponse table to reflect the new URL for the PCAnywhere smart task in ServiceDesk. This modification is very process and disk intensive and in environments where SQL performance may not optimal and / or the number of records to be affected is large, the script can timeout.

The current work-around is to remove the existing entries in the TaskResponse table that will be impacted by the script. By removing these entries, the smart task for remote control using PCAnywhere will be removed from all incidents in the system.

**CAUTION:** Running the following script will remove smart tasks for remote control using PCAnywhere for all existing incidents. Newly created incidents associated with computer assets will not be affected.

To implement the work-around, run the following SQL script against the 7.0 MR2 Ensemble database before rerunning the upgrade.

## -- BEGIN SQL SCRIPT

```
DELETE FROM TaskResponse WHERE [URL] LIKE '%&dialogModel=Start+PC+Anywhere%'
AND URL LIKE '%SD.IncidentManagement%'
```

-- END SQL SCRIPT

This is documented in the KB article found at <http://www.symantec.com/docs/TECH155863>.

**IF YOU ARE UPGRADING FROM 7.0 MR2 TO 7.1, DO NOT PROCEED. GO TO PAGE 32 COMPLETE YOUR UPGRADE. TO CONTINUE INSTALLATION, GO TO STEP 47.**

■ **Symantec recommends doing a clean install of the Service Desk with no upgrade**

47) Return to the ServiceDesk Setup screen and click **Next**.



48) When the ServiceDesk Installation launches, click **Custom Installation**.



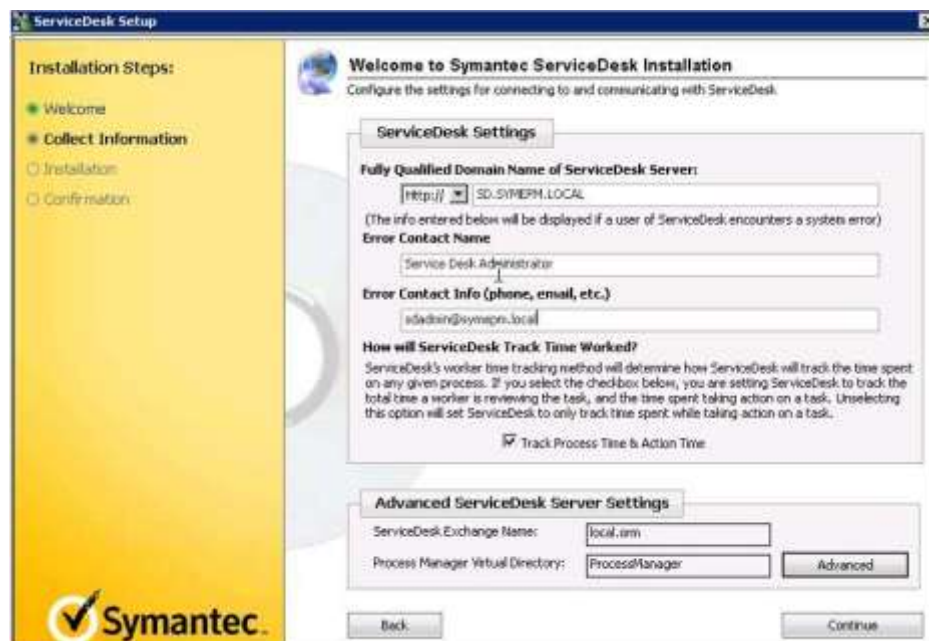


49) Review the **Installation Components** and click **Continue**.



50) Configure the **ServiceDesk** settings and click **Continue**.

**In my environment I had to put in the IP of the local SQL server- where Service desk was being installed- as it was not seeing the FQDM Name**





51) Configure e-mail settings. Make certain the SMTP test passes before clicking **Continue**.



The screenshot shows the 'ServiceDesk Setup' window with the 'Outbound Mail Settings' tab selected. The 'SMTP Server for Outbound Mail' is set to 'MGT.SYMEPM.LOCAL'. The 'Reply-to address' is 'sdadmin@symepm.local'. A 'Test' button is present, and a red 'Success' message is displayed next to it. Below this, the 'Inbound Mail Settings' tab is visible, showing options for 'Monitor External Mail Box' (checked), 'Server Address' (MGT.SYMEPM.LOCAL), 'Port' (110), 'Mail Protocol' (POP selected), 'User Name' (sdadmin), and 'Password' (masked with asterisks). 'Back' and 'Continue' buttons are at the bottom.

52) Select the **ITIL Process Components** to be leveraged and then click **Continue**.



The screenshot shows the 'ServiceDesk Setup' window with the 'ITIL Process Configuration' tab selected. It contains several configuration options with checkboxes: 'Enable SLA in Incident Management?' (checked), 'Use SLA in Incident Management' (checked), 'Enforce SLA Timeouts and Escalations?' (checked), 'Allow for Incidents to be Auto Escalated' (checked), 'Use Automation Rules to Determine Incident Routing' (checked), and 'Use Automation Rules' (checked). 'Back' and 'Continue' buttons are at the bottom.

53) Review the **Incident Management Configuration** and click **Continue**.



The screenshot shows the 'Incident Management Configuration' window in the ServiceDesk Setup application. On the left, the 'Installation Steps' pane shows 'Welcome', 'Collect Information' (selected), 'Installation', and 'Confirmation'. The main area is titled 'Welcome to Symantec ServiceDesk Installation' and 'Please configure the ITIL processes for ServiceDesk'. It contains the 'Incident Management Configuration' section with the following options:


- ☒ Send Notification Email on Incident Creation
- ☒ Send Notification Email on Incident Resolution
- Incident Survey Settings:**
  - ☒ Use Incident Survey
  - Percentage of User: 100
  - How long should the Incident Survey stay open?
    - Days: 2
    - Hours: 0

Below this is the 'Incident Close Codes' section, which says 'Please add values for incident close codes by typing in the text box provided below.' It includes an 'Add' button and a list of sample codes with 'Remove' buttons next to them:

Close Code	Action
Completed Success	Remove
Training Required	Remove
Review Documentation	Remove
No Fault Found	Remove
Monitoring Required	Remove
Advice Given	Remove

At the bottom are 'Back' and 'Continue' buttons.

54) Do not include sample data if this is a production system install. Click **Continue**.



The screenshot shows the 'Sample Data Configuration' window in the ServiceDesk Setup application. On the left, the 'Installation Steps' pane shows 'Welcome', 'Collect Information' (selected), 'Installation', and 'Confirmation'. The main area is titled 'Welcome to Symantec ServiceDesk Installation' and 'Installation Sample Data Collection'. It contains the 'Sample Data Configuration' section with the following options:

- ☐ Install Sample Data

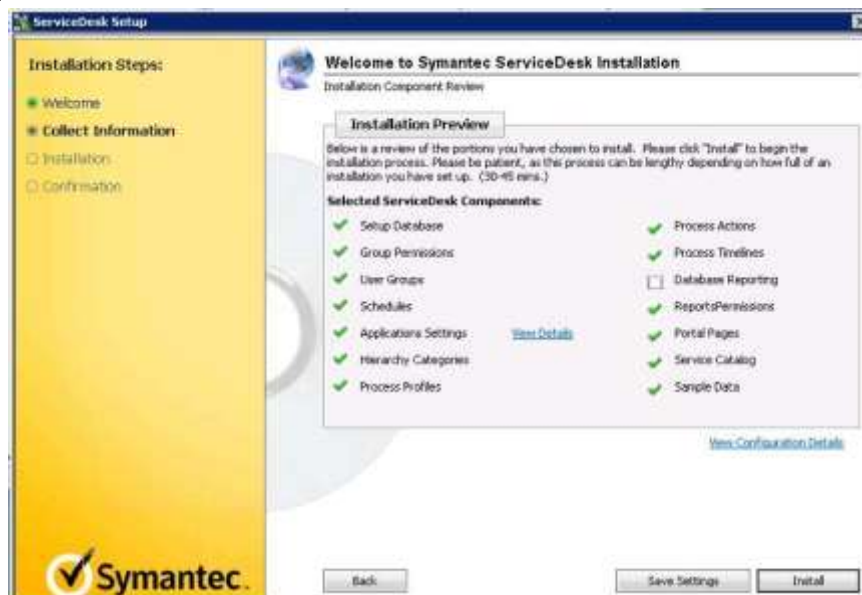
Below this is a list of sample data items that will be added if the checkbox is checked:

1. Sample Users
2. Sample Organization Units
3. Sample KB Categories
4. Sample Incidents
5. Sample Problems
6. Sample Change Requests
7. Sample KB Requests

At the bottom is the 'Domain Name:' field with a text box and a note: 'e.g. yourdomain.com' and 'e.g. symantec.com (Do not include the "@" in the address)'. At the bottom are 'Back' and 'Continue' buttons.

55) Review the installation and click **Install**.

**NOTE:** If presented with an exception on collection handling, click “Try Next Step”. This can happen if in a single server environment for SMP. This will not impact the install in a negative way.



56) When installation completes, click the **Finish** button.



57) Launch Processmanager and login with [admin@logicbase.com](mailto:admin@logicbase.com) password admin.

This completes the installation process. The remaining sections contain upgrade procedures.

## SERVICEDesk UPGRADE PROCESS

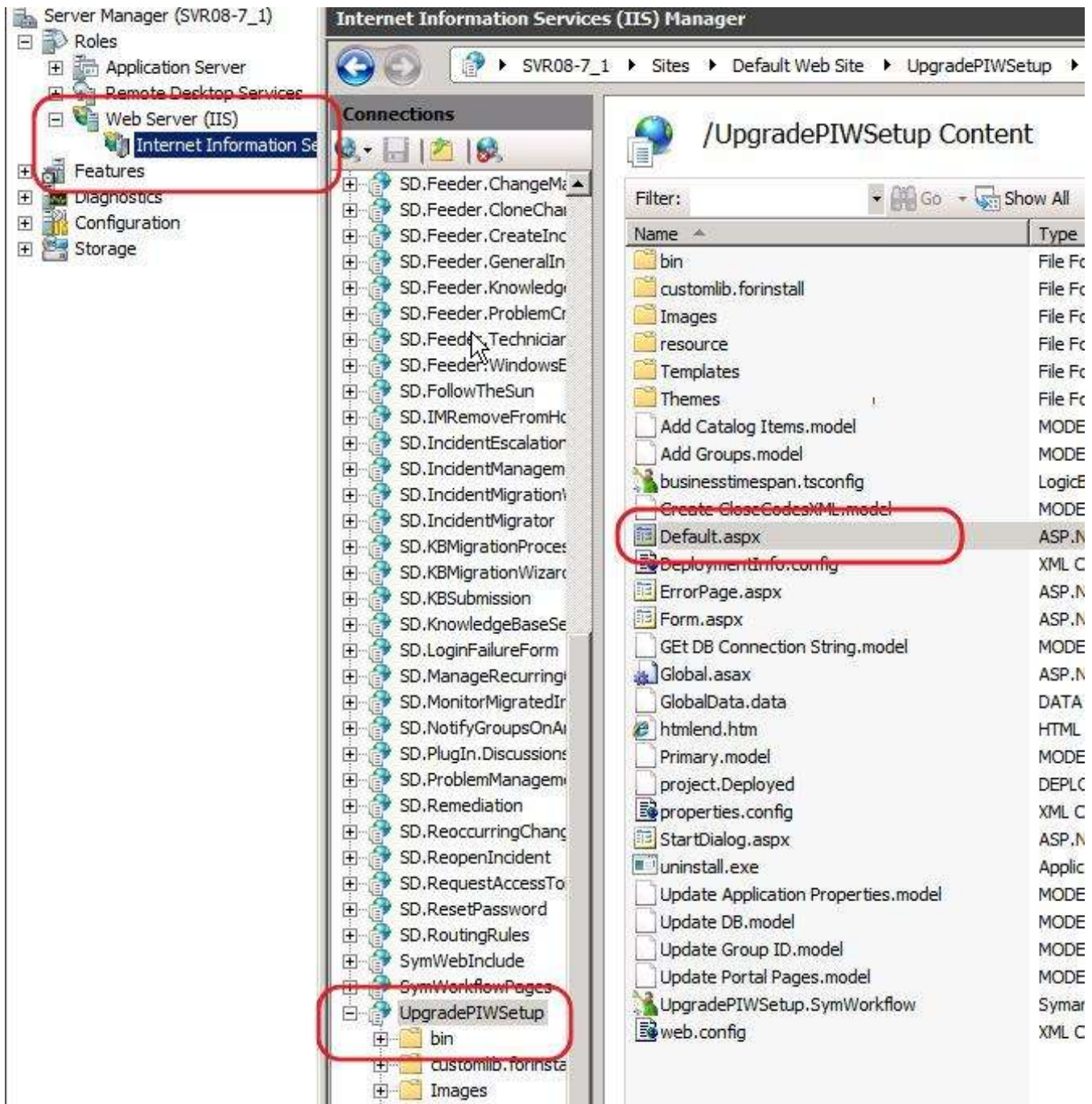
**In order for this to work you would have had to connect to a restored version of the ensemble db from your SD 7.0 MR2 install back on step 34. It might also work using the upgrade install method for SD 7.1**

The remainder of the Document contains instructions on performing an upgrade of an existing system.

1. The upgrade installation routines are accessed by opening the web pages in IIS. Open the Default Web Site, and scroll to the bottom of the list.
2. You will find the "UpgradePIWSetup" there. Right-click on it and change its view to content view
3. In the right pane, find and right-click on Default.aspx and click Browse. This will open the installer.

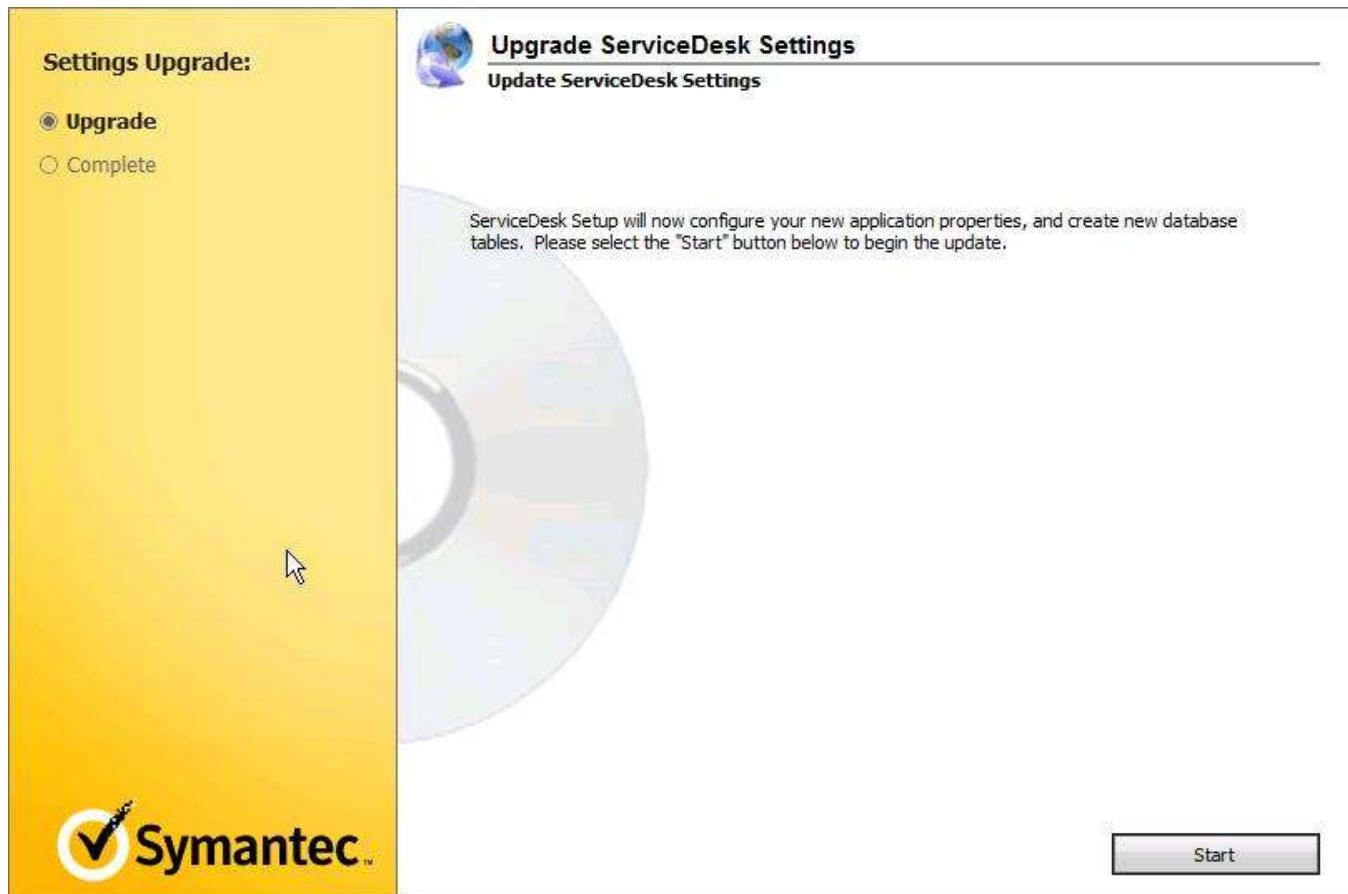






The screenshot shows the Internet Information Services (IIS) Manager interface. On the left, the 'Server Manager (SVR08-7\_1)' tree is expanded to 'Web Server (IIS)'. The 'Connections' pane shows a list of virtual directories, with 'UpgradePIWSetup' selected. The main pane displays the contents of the '/UpgradePIWSetup Content' directory. A red circle highlights the 'Default.aspx' file in the list.

Name	Type
bin	File Folder
customlib.forinstall	File Folder
Images	File Folder
resource	File Folder
Templates	File Folder
Themes	File Folder
Add Catalog Items.model	MODEL
Add Groups.model	MODEL
business.timespan.tsconfig	Logic File
Create Close Codes XML.model	MODEL
Default.aspx	ASP.NET
DeploymentInfo.config	XML Configuration
ErrorPage.aspx	ASP.NET
Form.aspx	ASP.NET
GET DB Connection String.model	MODEL
Global.asax	ASP.NET
GlobalData.data	DATA
htmlend.htm	HTML
Primary.model	MODEL
project.Deployed	DEPLOYMENT
properties.config	XML Configuration
StartDialog.aspx	ASP.NET
uninstall.exe	Application
Update Application Properties.model	MODEL
Update DB.model	MODEL
Update Group ID.model	MODEL
Update Portal Pages.model	MODEL
UpgradePIWSetup.SymWorkflow	Symantec
web.config	XML Configuration



4. Click Start.
5. You will see all of the settings being updated.
6. You may encounter a screen as shown below.



## Settings Upgrade:

☒ Upgrade

☐ Complete



## Upgrade ServiceDesk Settings

### Update ServiceDesk Settings

Process Manager is refreshing the profile service after being updated. This can sometimes take a few minutes. The upgrade process cannot continue until this service is available. If service is available and the 7.1 application properties have already been added to ServiceDesk, you may skip this step of the installer.

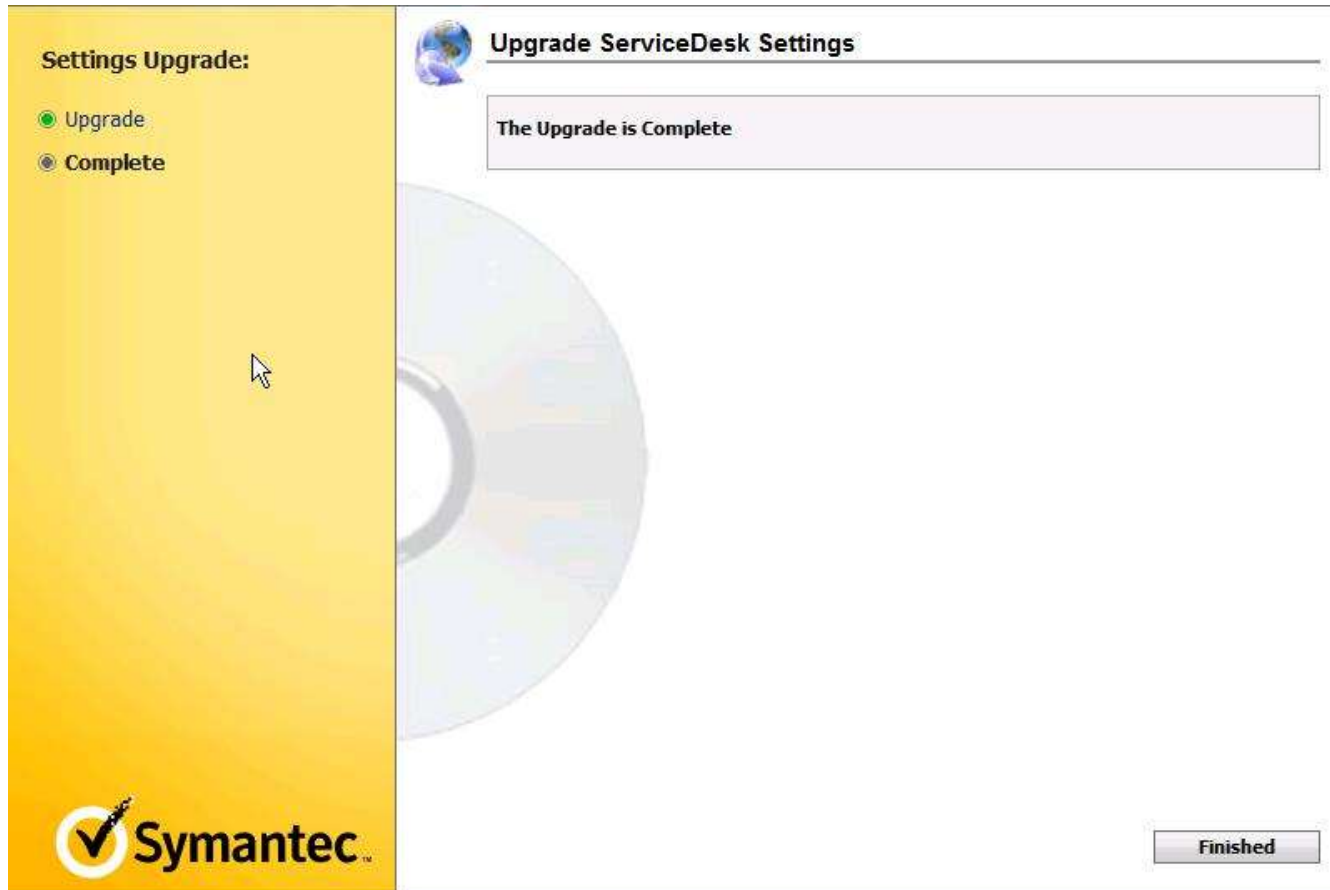
To continue checking click the try again button. If the problem persists contact ServiceDesk Support.

Cancel

Skip

Try Again

7. Simply click on Skip, then Cancel. You will see a screen like the following one.



8. You can click on Finished and your upgrade will be complete.  
9. At this point you should open and test any processes that you use regularly.

