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

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Overview

Notes in <mark>Yellow</mark> 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 _ <u>http://www.symantec.com/docs/HOWT042147</u> 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 <u>http://www.symantec.com/docs/HOWT042148</u> 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
 - o 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
 - o 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)
 - o 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 email 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.

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Perform the following tasks to configure the	L DEVIE			Wind
O Provide Computer Information			V Inneten interested	
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and the second	Time June	1/10/09/10/Lames Tree (JEA Canada)		
P Configure estimations	Local Stress Conservation	YNESHELLE		
🖍 Forda couplet raise and threats	Full Computer Nation: Research	UD-D INICHALUEDAL DHADHALUEDAL		
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2 Torontal advert	Checked for Underson Installed Chebrary	Const.		
Calorina This Server			Commission and	
The Antonio	Balan.	tere .		
B sature	Tealment:	Here .		
San Evente Private Desition	Benarit Desking:	Dates		
Codges Western Frend	Times .	Data da		

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

Add Roles Wizard		8
Select Serv	er Roles	
Before You Begin Convert Role Role Services Web Services Confirmation Prograss Results	Select one or more roles to install on this server. Folde: Active Directory Certificate Services Active Directory Certificate Services Active Directory Federation Services Active Directory Services Active Directory Services Mission Server Biology and Access Services Print and Document Services Mindows Server Lipdate Services Windows Server Lipdate Services	Decorption Application Survey provides cerebral hydroagenerit and heating of high- performance databuted business applications such as these balls with Districtions Services and JACT Pransessori. 3.5.1
	< Previous	Next > Entrat Cancel



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

**	You cannot install Application Server unless the requ	ired features are also installed.
	Features:	Description:
 NET Framework 3.5.1 Features .NET Framework 3.5.1 Windows Process Activation Service Process Model .NET Environment Configuration APIs 		Microsoft .NET Framework 3.5.1 combines the power of the .NET Framework 2.0 APIs with new technologies for building applications that offer appealing user interfaces, protect your customers' personal identity information, enable seamless and secure communication, and provide the ability to model a range of business processes.
		Add Required Features Cancel

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

Selans You Bage) Server Woles (gold ston Server BOILS Server (200) Role Servers Confination Happens Insults	Select the site services to robal for Application Server: Rule services	Description: Moti Server (TD: Starport enables Appelation: Server is host cateral in the consurcide one (TTP:); modules support for APA SetT applications that can be accessed via a Web between work as the internet & galaxies, and web services bait using modules. Commanisation functionity (WCP).
	Prior Mand with second	

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

	Northeast Mark and Annual Mark	
(S-)	Add role services and features require	ed for Web Server (IIS) Support?
	You cannot install Web Server (IIS) Support unless the requ	uired role services and features are also installed.
	Role Services:	Description:
	 Application Server Windows Process Activation Service Support Web Server (IIS) Web Server Management Tools NET Framework 3.5.1 Features WCF Activation 	Application Server provides central management and hosting of high- performance distributed business applications such as those built with Enterprise Services and .NET Framework 3.5.1.
		Add Required Role Services Cancel
(j) Wh	vare these role services and features required?	

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.

Before You Begin Server Roles	Select the role services to install for Web Server (115): Role services:	Description:
Application Server Role Services Web Server (IIS) <u>Role Services</u> Confirmation Progress Republic	Its Clent Certificate Mapping Authentication Its Clent Certificate Mapping Authentication Its Request Pitreming Its P and Domain Redrictions Its Management Compression Its Management Scripts and Tools Its Management Scripts and Tools Its 6 Management Scripts Its 7 Banket Its 7 Banket Its 8 Management Scripts Its 8 Management Scripts Its 8 Management Scripts </td <td>IIIS 6 Nor-accessent Compatibility or provides forward compatibility or your applications and scripts that u the two IIS APIS, Admin Blace Obje (ABO) and Active Directory Service Interface (AASD). You can use exis IIS 6 scipts to manage the IIS 7 W server.</td>	IIIS 6 Nor-accessent Compatibility or provides forward compatibility or your applications and scripts that u the two IIS APIS, Admin Blace Obje (ABO) and Active Directory Service Interface (AASD). You can use exis IIS 6 scipts to manage the IIS 7 W server.



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.

Server Manager		DIALITATI)	
le Action Vew Help			
• • • • • • • • • • • • • • • • • • •			
Setter Manager (SD)	Server Hanager (50)		
 A generatiz A generatiz Configuratiz Configuratiz Strage 	Get an overview of the status of	this server, perform top sumagement tasks, and add or	remove server roles and features.
	···· Server Summary		Server Suscery Help
	· Computer Information		👫 Change System Properties
	Pull Computer Name:	SD-SHMEPHULOCAL	View Metwork Convections
	Dunialni	SVHEPHLLOCH.	Configure Server Manager Remote
	Local Area Connectors	192.106.1.13	Paragenerit
	Resole Dealdop:	Enabled	
	Server Manager Ratscills Management:	Divided	
	Product IDI	55241-557-3894614-04463 (Activeised)	
	C Do not show menthic consule at log	on .	
	· Security Information		😰 Go to Windows Firewall
	Wrattors Finesalt	Donaatti On	E Contigue Lipidates
	Westione Updates	Not configured	hin Security Configuration Wand
	Last checked for updatesi	Never	The Configure IE ESC
	Last installed updates:	Rever	
	It Enhanced Security Configuration (ESC):	On for Administrators On for Users	



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).

Internet Explorer Enhanced Security Configuration	×
Internet Explorer Enhanced Security Configuration (IE ESC) reduces exposure of your server to potential attacks from Web-based conte	s the ent.
Internet Explorer Enhanced Security Configuration is enabled by default for Administrators and Users groups.	
Administrators:	
🧳 🤇 On (Recommended)	
C Off	
Users:	
🤣 C On (Recommended)	
S off	
More about Internet Explorer Enhanced Security Configuration	
ОК	Cancel

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**.







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**.

omain. State		
-	Firewall state:	I <u>×</u>
	Inbound connections:	Nock (default) 🝸
	Outbound connections:	Niow (default)
	Protected network connections:	Customize
Settings	ř.	
1	Specify settings that control Window Firewall behavior.	s Customize
Logging	<u>.</u>	
	Specify logging settings for troubleshooting.	Customize



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**.

Alway	s nabity		
-	-	Never notify me when: Programs try to install software or make changes to ny consider	
-	2	I make changes to Windows settings	
-	-		
-		Not recommended. Choose this only if you need to use programs that are not certified for Windows 7 because they do not support User Account Control.	
Never	notify		

16) If the SQL Server Instance is not on the same server as the ServicDesk 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 <u>Feature Pack for Microsoft SQL Server 2005 - December 2008</u> or newer. **Note:** Any other versions are not supported.

Symantec.

a. <u>sqlncli x64.msi</u> - Microsoft SQL Server Native Client (from December 2008)_
b. <u>SQLServer2005 ADOMD x64.msi</u> - Microsoft SQL Server 2005 Analysis

Services_ADOMD.NET (from December 2008)

c. <u>SQLServer2005 XMO x64.msi</u> - 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.

Server Planages			I Contraction of the second seco	
	17		Advanced street. Properties	RIX.
Server Messook (581) Paker	Denses in Control Inc.	Achieve .	Select Users, Computers, Service Accounts, or Groups	1212
Padone Depointe Carlor den	A start of the second s	Mare Autors	Select the start you Draw Serves to early a finance	- noutrou
E (1) Talk Schelube E Produce Thereal Arts Adv. Control Services add Web Control	Boards All Table Board The grap are allowed to Boards Boards Boa	Mus Adms	From the location	Locations.
Construction C		Enter the object nerves to select (asserbles)		
		Server Deut, SGL 3 excertiscriteRV/CE/25/14EPM LCCAU3	Check Names	
	Brook billing allow Pantan mar program a ganda (Brook dar Brook film replications a dande Brook Carlos and a second film replication and a second film r		Advant	Canot

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,orGroups 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 forma-I typed in the Domain/Host-Name 6 If the test is successful, click OK.

7 Close the Computer Management page.

the Autom two regi				
中国家により	UT		Second constructions Properties	7 8
Service Photosole (581)	Farmer 10 Deserts	dalama	Select likers, Computers, Service Accounts, or Groups	
Professor Professor	Name Description France An Oracle State And Annual Ann	New Alton New Alton New Alton	Select the stars you User, Service Accounts or Gauges From the location [SHARM LIDEAL Enter the stars receipt to select learning)	Oliportypes
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18) Launch the **Internet Information Services (IIS) Manager** and access the **Default AppPool**, **Advanced Settings**.

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File View this		
Convertions Q I. 2. 18. Vg Stat Page B Vg Stat Page B Vg State Page B Vg State Page	Application Pools The page lets you view and manage the last of application pools on the server. Application pools are associated with worker processes, contain one or more applications, and provide solution among	Actions
in a Stee	Marrie Startus Apple Marrie Startus Mell Triserus Menicard Ppell Mericard Ppell Clease: Apple Startus Mell Triserus Menicard Ppell Mericard Ppell Merica	 Shart Shap Recycle Edit Application Bank Setting Recycling Advanced Setting Denses
	stop kocycle inso: Settings keticilizo Advanced Settings	Remove Vev Applications Heb Online Heb
	Vertaller Remove New Applications	

Servicedesk 7.1 Installation and Upgrade

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

d-ancid Settings	213
E (General)	
.NET Pronework Version	v2.0
Enable 32-Bit Applications	False
Managed Pipeline Node	Integrated
tiplie.	DefaultAppPool
Queue Length	1000
Start Automatically	True
E CPU	
Link	.0
Linit Action	NoAction
Linit Interval (minutes)	5
Processor Affinity Enabled	False
Processor Affinity Mask	4294967295
Process Model	
Identity	ApplicationPoolIdentity
C Bult-in account:	
Custon account:	
tak (id. bul Lot	0 Cancel
Set Gredentials	2 ×
User neme:	Carcel
SVINEPHILSDSER	VICE
Password	
er View	
California Company	

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

ivanced settings		7
🗄 (General)		
NET Framework Version	¥2.0	П
Enable 32-Bit Applications	a fighter	-
Managed Pipeline Mode	Classic	
Marte	Contractor of	1
Queue Length	1000	
Start Automatically	True	
e opu		
Link	0	
Linit Action	NoAction	
Linit Interval (ninutes)	5	
Processor Alfinity Enabled	False	-
Processor Affinity Hask	4294967295	
🗄 Process Model		
Identity	SYMEPM\SDSERVICE	
Idle Time-out (minutes)	20	
Load User Profile	False	
Maximum Worker Processes	1	
Ping Enabled	True	
Ping Maxmum Response Time (secon	c 90	
Ping Period (seconds)	30	
Shutdown Time Linit (seconds)	90	
Quertue Time Limit /Germods)	90	-



21) Access the Classic AppPool, Advanced Settings.



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

-			
El (Genera	Q	1	-
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Lineber 3d	-ex Appelations	Page .	- 10
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l Program Shutdow Startup	Set Credevilials	93	3
f FeigPen Shutdon Statun	User namel SVMDPH(SDSERVICE	E	
l Pegreen Studion Startun Identity JolentRyTyn	Get Credevitials User namei SYMDPH(sDSERV9C) Password)		
l Peig Pen Shutdon Startun Identity Joint yTyn built-in acc	Set Credevilials User namei SYMEPH(SDSERVSCI Password)	E	nun as Service,
l Peigreen Shubdae Sharhun Identity JidentRyTyj built-in acco Lacal Syste	Set Condentials User name: StriktPer(SDSERV9C) Password:	E	Tunias Service,
l PegyPari Shutdan Startun Identity Identity Identity Identity Sult-in acci Lacal Syste	Set Credentials User name Shrkper(sbdErvoor Password) Confirm password:	2 () 2	Tun as Service,
l Program Shutdon Rantun Identity Identity Identity Sult-in acci Lacal Syste	Set Credentials User name! Smitchif(SDSERVSCI Password) Conitine password) Conitine password;	E	run as Service, Cancel
l Program Shutdon Rantun Identity Identity Identity Identity Syste	Set Credentials User name: [SYMCPH[SDSERVICE Password] [******* Confirm password] [*******	E	nun as Service, Cance

23) Reboot the server. <mark>STOP REBOOT the server to reset security rights</mark>

24) Login to the server with the Installation Account.



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.

a. In the SMP Altiris Console, click on **Settings > Security > Roles**.

b. Click on the **Symantec Administrators** group.

c. Add the Service Desk account or Installtion account to the group

- a. 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**.

Installation Steps:	Maintenance	
License Agreement	Please choose the installation options	
Server Roles	-	
	New Install	
	Upgrade	
	Cograde/Transfal current ServiceDeek.	
	Unitedal	



ServiceDesk 7.1 Installation and Upgrade

29) Select all components and click Next.

Installation Steps:	1990	Server Roles	
License Agreement	5	Select the roles you want to grant to the server	_
Server Roles		🗭 Wolfflee Server	
		P Background Processing	
		12 Workflow Designer	
		F ServiceDesk ITEL Core	
		Incolant Management	
		M Change Menagement	
		Protein Hulagenera Release Hanagenera	
		🗭 ServiceDeek Portal	
	1	🖗 ServiceDesk Portal Database	
Sumantor		e Dress Nanit to	Carcel

30) Click Next on confirm IIS Restart.



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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 user 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.

Installation Steps:	Server Configuration
License Agreement	Setup the Server settings.
 Maintenance 	10002000001
Server Roles	Web Site
IIS Restart Confirmation	Please select which Web Site to set the application to use:
 Install Location 	Default Web Site
Server Configuration	and the second sec
Workflow Designer Tasks	Base URL
SMP Server Oredentials	Please select IP address or domain name for the application to use as base URL
O Database Connection	(You can type in your base URL, but do NOT include http: or https: and be careful to have it
C Eatabase Configuration	Agent:
Catabase Replication	pu I
Advanced Cube Reporting	Use SSL (Mtps://)
System Accounts Access	Tech Terry Anderstein
Process Manager Configuration	Lass tray appreation
Process Manager Authentication	Run when installation congletes
WUTSDUE PERSISTERCE	
Civitia Chart	
System Creck	
C look line	
Cate Carling	
Componisticationsk.	
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V Symantec	< Prev Next > Cate

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

Installation Steps:	Morkflow Designer Tasks
License Agreement.	Which tasks should be performed for Workflow Designer?
 Mantenance 	the state of the s
 Server Roles 	Workilow Designer Shortcuts
 IIS Restart Confirmation 	P Desktop
 Shstall Location 	L Osektaurch
Server Configuration	and the second sec
 Workflow Designer Tasks 	Workflow Designer Preferences
SMP Server Credentiale	E Line Cki Tool Preferences
Database Connection	
Database Configuration	
Batabase Replication	
Advanced cube Reporting	
System Accounts Access	
Process Manager Configuration	
Process Manager Autentication	
Worknow Herselence	
Shind Crew	
System Charles	
histolium	
Case of Carrying Dark	
ourb services	
1.	
V Symantec	< Prev Natot > Cancel



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.

Installation Steps:	SMP Server Credentials
Installation Steps: License Agreement Maintenance Server Roles IIS Restart Confirmation Instal Location Server Configuration Workflow Designer Tasks SMP Server Credentals Dektabase Configuration Database Replication	SMP Server Credentials Setup Symantec Management Platform server Credentials. Default SMP Server Triter the name of the SMP server that will be used. This can be IP address, PQDM, or common name. MCT.SIMERALOCAL Doman that this SMP server belongs to: (May be left blank) SMERM.LOCAL User name for Workflow Server to use when interacting with the SMP server. alladmin
Advanced Cube Reporting System Accounts Access Process Manager Configuration Process Manager Authentication Workflow Persistence Sym2 ORM System Check Ready To Install Installing	Password for User specified above.
Setto ServiceDesk	<prev next=""> Cancel</prev>

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

nstallation Steps:	Database Connection
License Agreement	Please configure the Process Manager Database Connection
Server Roles IIS Restart Confirmation Install Location	Database connection Data Source : ingt.symeps.local
Server Configuration Worldfow Designer Tasks SMP Server Credentials Database Configuration Database Configuration Database Replication Advanced Cube Reporting System Accounts Access	Data Base : ProcessManager Connect using V Windows Integrated Security C MS SQL Server Security Liber ID: Password Test
Process Manager Configuration Process Manager Authentication Workflow Pensistence SymQ ORM System Check Practy To Install Installing Setup ServiceDesk	Database Connection Test Success
Symantec	<prev next=""> Cance</prev>



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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**.

Installation Steps:	Advanced Cube Reporting
License Agreement Maritenance Server Roles IIS Restart Confirmation Install Location Server Configuration Worldow Designer Tasks SMP Server Credentials Database Connection Database Configuration Database Configuration Database Replication Advanced Oxibe Reporting System Accounts Access Becomer Massaer Configuration	Advanced Cube Reporting Advanced Cube Reporting Analysis Services Connection Data Source Data Source Index Source Test Image: Analysis Services Connection Test
Process Manager Authentication Workflow Pensistence Sym0 ORM System Check Ready To Install Installing Setup ServiceDesk	Note: Advanced Cube Reporting now requires that IT Analytics be installed. The connection parameters entered here are for the IT Analytics database. If you do not yet have IT Analytics installed, you can repeat this process when it is installed or you can enter the connection parameters here and verify them later.
Symantec.	« Prev Nator » Cancel

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

Installation Steps:	System Accounts Access	
License Agreement	Specify which accounts on your system will be granted access to database.	
Maintenance		
Server Roles	ASPNET	
IIIS Restart Confirmation	NETWORK SERVICE	
Install Location	Its APPPOOL/DefaultAppPool	
Server Configuration	IIS APPPOOL/Clessic .NET AppPool	
Workflow Designer Tasks	IN SUPERIORE	
SMP Server Credentials		
Database Connection		
Database Configuration	Specify additional account if needed and press "Add":	
Database Replication	Svine ped spise purcel	
Advanced Cube Reporting	Providence and	
System Accounts Access		
Process Manager Configuration		
Process Manager Authentication		
Workflow Persistence		
SymO ORM		
Switem Check		
Ready To Install		
Installing		
Setup ServiceDesk	- / -	
a second design of the second s		
-		
V Sumantor	-C Prev	hant > Cancel

✓ Symantec.



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.

Installation Steps:	Process Manager Configuration
License Agreement Maintenance Server Roles IIS Restart Confirmation Install Location Server Configuration Workflow Designer Tasks SMP Sarver Credentials Database Configuration Database Configuration Database Reslocition	Process Manager Configuration Setup Process Manager Configuration settings. Vartual Directory Type in the name of the Process Manager virtual directory (leave blank if you with to create only default virtual directory) ProcessManager Shortcuts Dedatop Quick Learch
Advanced Cube Reporting System Accounts Access Process Manager Configuration Process Manager Authentication Workflow Persistence	User Welcome Message Users as they're added to the portal Critical Errors
SymQ CRM System Check Ready To Install Installing Setup ServiceDesk	Use Process Manager for Critical Errors
Setup ServiceDesk	< Prev Next > Cancel

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. <u>www.symantec.com/docs/TECH146586</u>

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 configured after the installation is configured.

Authentication is desired, this should be configured after the installation is complete. <u>http://www.symantec.com/docs/TECH148103</u>

AFTER install – log in as <u>admin@logicbase.com</u> 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 <<u>http://www.symantec.com/business/support/index?page=content&id=TECH148103</u>>



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

Installation Steps:	Workflow Persistence
License Agneement Maintenance Server Roles Its Restart Confirmation Instal Location Server Configuration Vorkflow Designer Tasks Workflow Designer Tasks Datbase Configuration Datbase Connection Datbase Configuration Datbase Configuration Datbase Replication Advanced Cube Reporting Server Access Renager Carlinguration Process Manager Carlinguration Process Manager Authentication Workflow Persistence Server Ceded Server Chedel Server Chedel	
	Note: your selection should nation your existing setting or current princesses are lengeridaed. Please read instructions.



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.









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





Installation Steps:	Welcome to Symantec ServiceDesk Installation
	Provide settings to configure the email server
 Welcome 	
Collect Information	Lutbound Mail Settings
) Installation	5MTP Server for Outbound Mail: (Used to send ensails)
Confirmation	MGT.SIMEPM.LOCAL
	Reply-to address: (Used as the "from" address of auto generated emails)
	sdadnin@synepn.local
	Test Sourcessi
	Inbound Mail Settings I 🕅 Montor External Mail Be
	Configure Email Monitoring Service
	Server Address: INGT.SYREPPILLOCAL Port: 110
	Mail Protocol: C prap @ pop Use SSL:
	User Name: sdadnin
	Passworth Confirm PW:
	1a
d'ennentes	
Symantec	Bed: Continue

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





53) Review the Incident Management Configuration and click Continue.



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





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.

Installation Steps:	Welcome to Symantec Service	cebesk instanation
Welcome	Instalation Component Review	
Collect Information	Installation Preview	
C Installation	Below is a review of the portions you have chosen to install. Please clob, "Install" to installation process. Please to patient, as this process can be lengthy depending or installation you have set up. (20-45 error.)	
a contraston	Selected ServiceDesk Components:	
	🖌 Setup Database	Process Actions
	Stroup Permissions	🥜 Process Timelines
	V Deer Groups	[1] Database Reporting
	✓ Schedules	🥔 ReportsPermissions
	Applications Settings	Dotails 🥪 Portal Pages
	🛩 Herarchy Categories	🧈 Service Catalog
	Process Profiles	🥪 Sample Data
		Wes Configuration Deta
Symantor	1922	

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



57) Launch Processmanager and login with <u>admin@logicbase.com</u> 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.

You will find the "UpgradePIWSetup" there. Right-click on it and change its view to content view
 In the right pane, find and right-click on Default.aspx and click Browse. This will open the installer.

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









- 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.