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

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Overview

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.

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
  - 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)

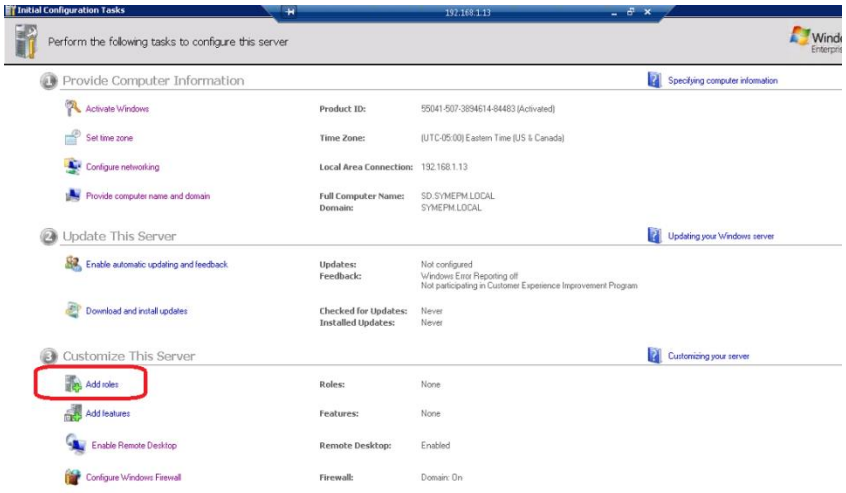
ServiceDesk 7.1 Server Installation and Upgrade Procedure Instructions

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.

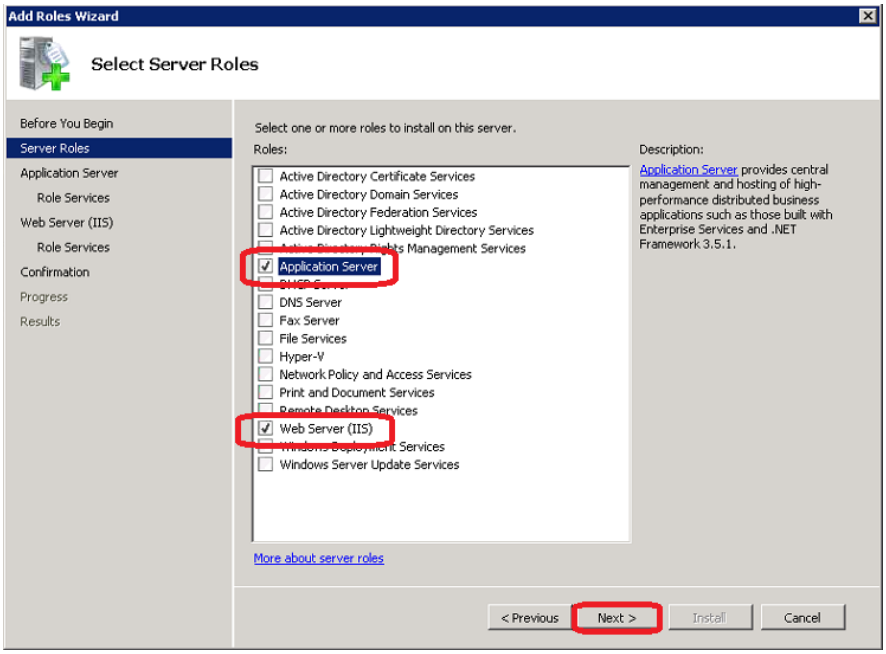
SERVER ROLES, FEATURES & WEBSERVICES SETUP

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.

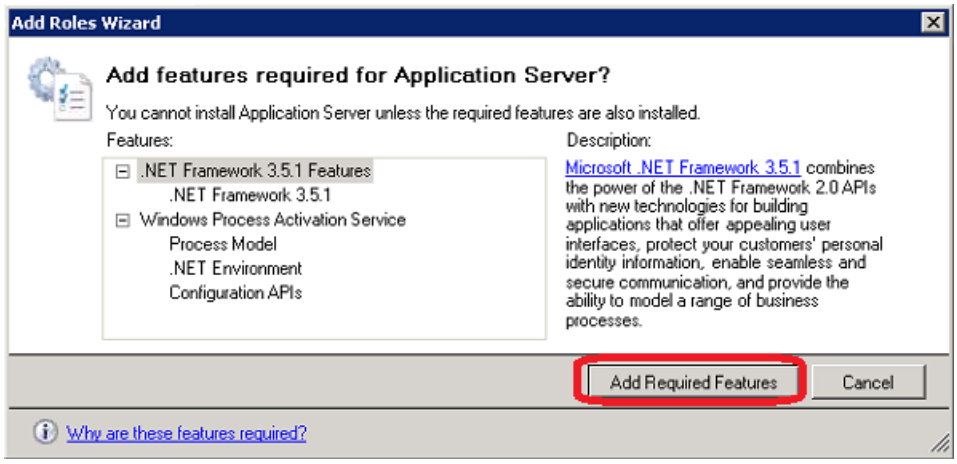
1) Login to the server with the Installation Account.
2) From the Initial Installation Tasks, Windows 2008 UI, select **Add Roles**.



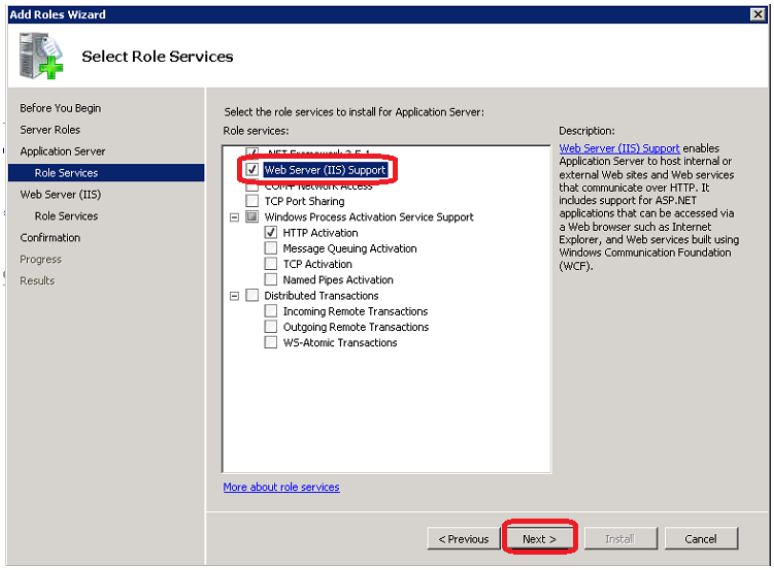
3) In the Select Server Roles, Windows 2008 UI, select **Application Server** and **Web Server (IIS)**. Then click **Next**.



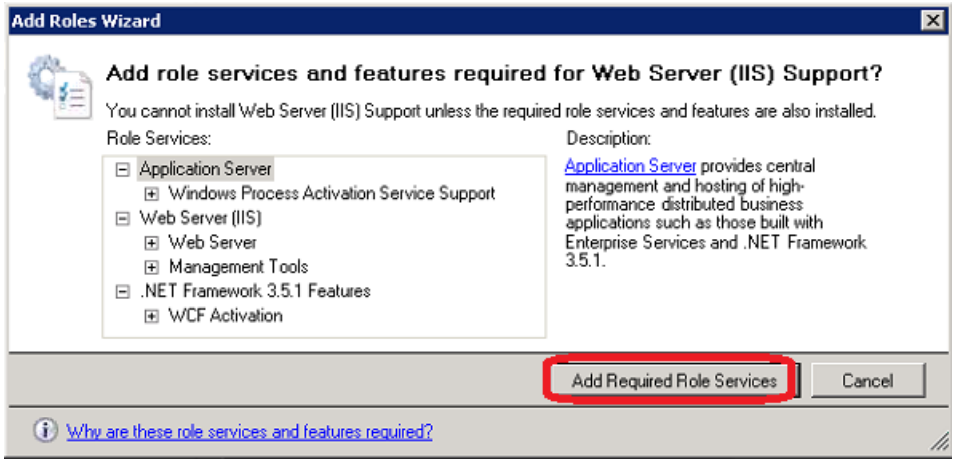
4) When prompted to **Add features required for Application Server?** Click **Add Required Features**.



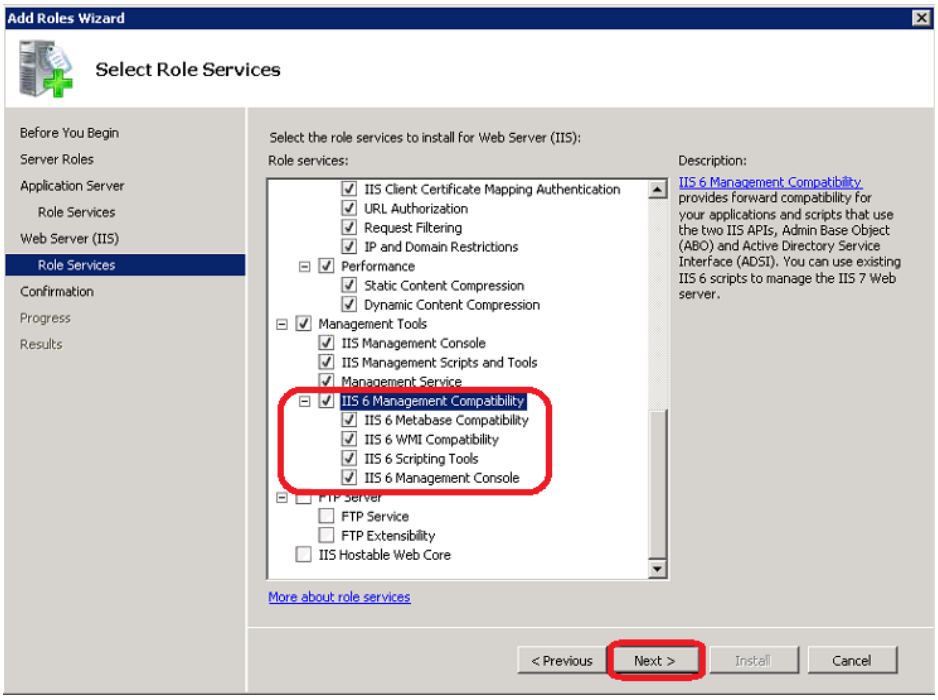
5) In the subsequent Add Roles Wizard UI for **Select Role Services**, select **Web Server (IIS) Support** and click **Next**.



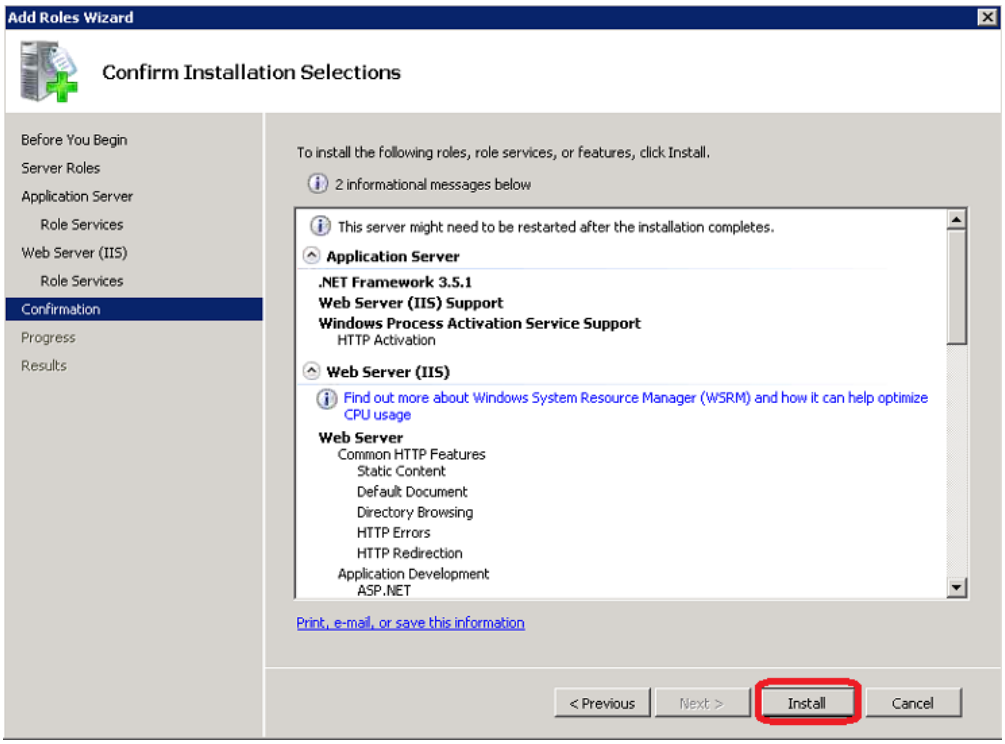
6) When prompted to **Add role services and features required for Web Server (IIS) Support?** Click **Add Required Role Services**.



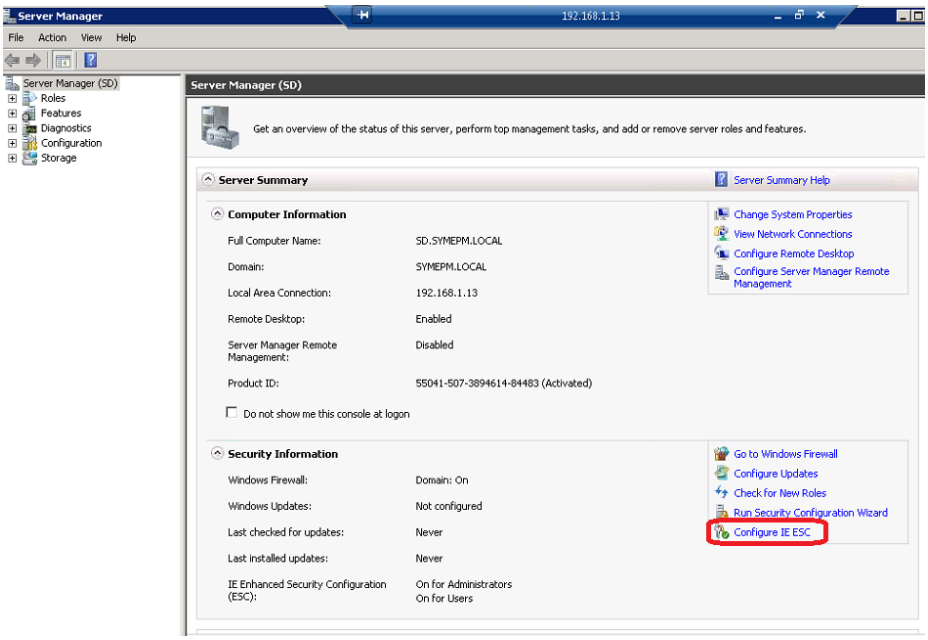
7) Continuing through the Add Roles Wizard, on the **Select Role Services** page, add **IIS 6 Management Compatibility** and make certain all subcomponents of the role service are selected before clicking **Next**.



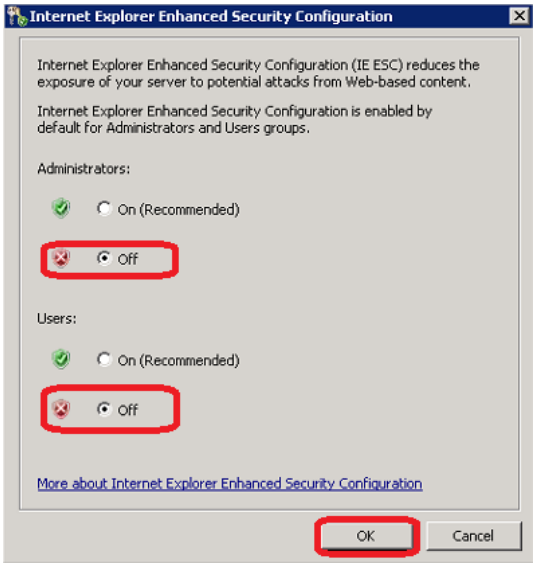
8) On **Confirm Installation Selections**, click **Install**.



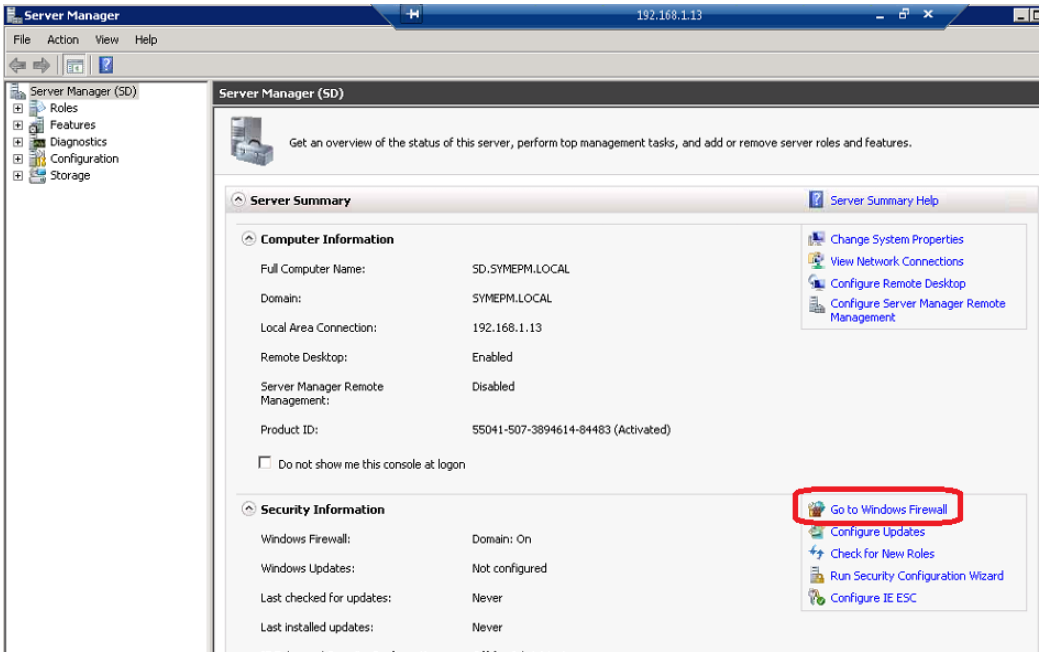
9) Launch the Windows 2008 **Server Manager** and verify that the root node in the left pane of the UI is selected. Then click **Configure IE ESC** in the right pane of the Server Manager UI.



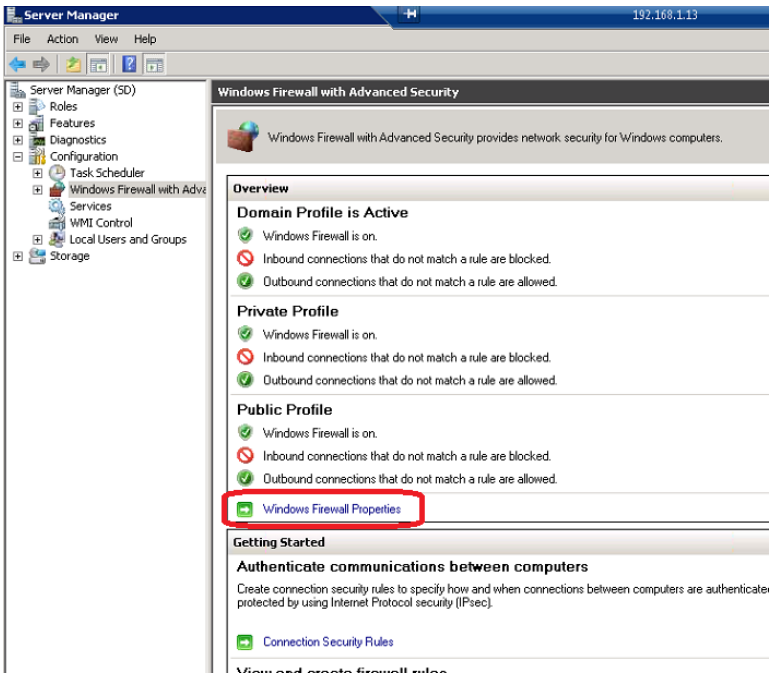
10) When presented with the **Internet Explorer Enhanced Security Configuration** interface, select the **Off** radio button for Administrators and for Users (turning off this setting for users is optional and has no bearing on the installation process but is recommended).



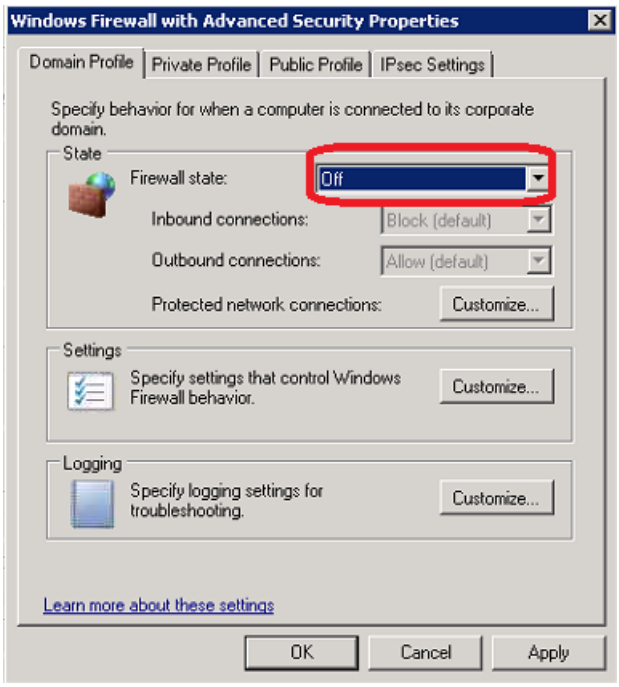
11) In the Windows 2008 **Server Manager** UI, verify that the root node is selected in the left pane. In the right pane, click **Configure Windows Firewall**.



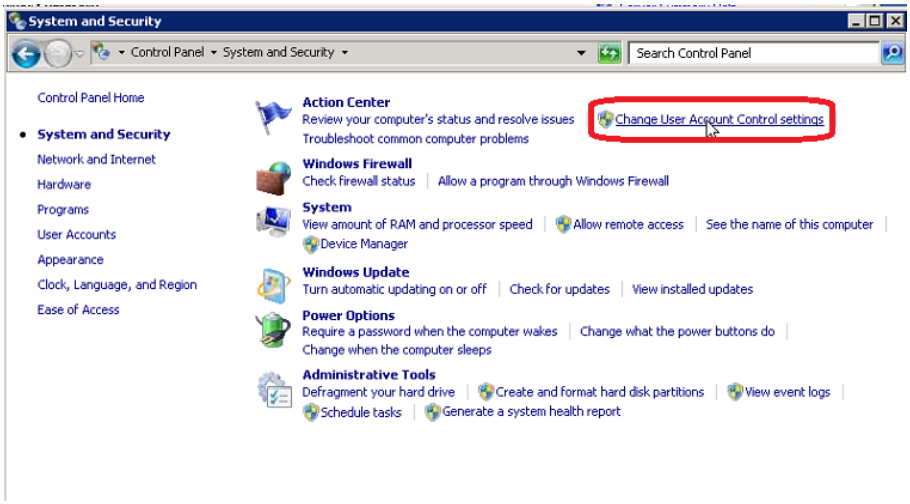
12) When presented with the **Windows Firewall with Advanced Security** interface, click **Windows Firewall Properties**.



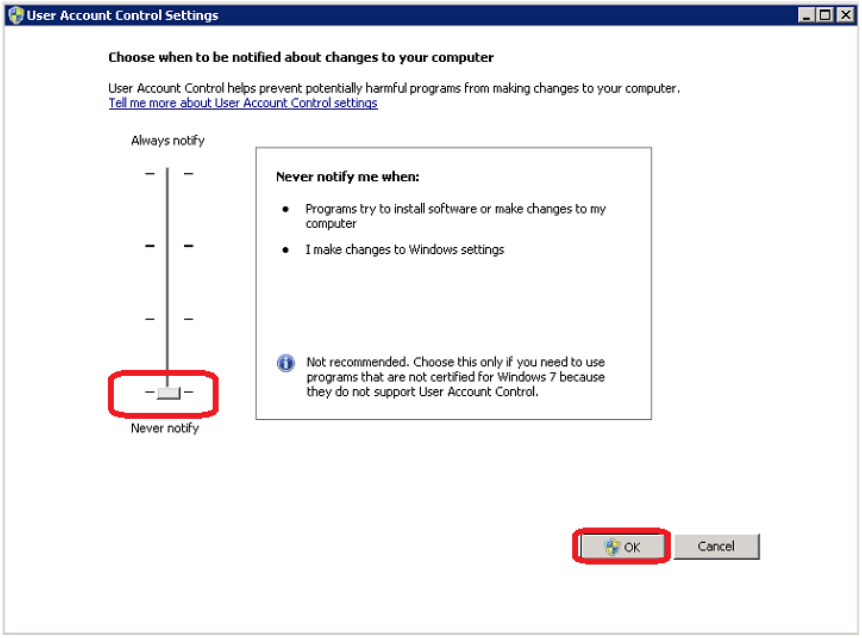
13) When the **Windows Firewall with Advanced Security** properties configuration UI presents to the screen, turn **Off** the **Firewall State** for the **Domain Profile** using the available drop-down menu and then click **OK**.



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



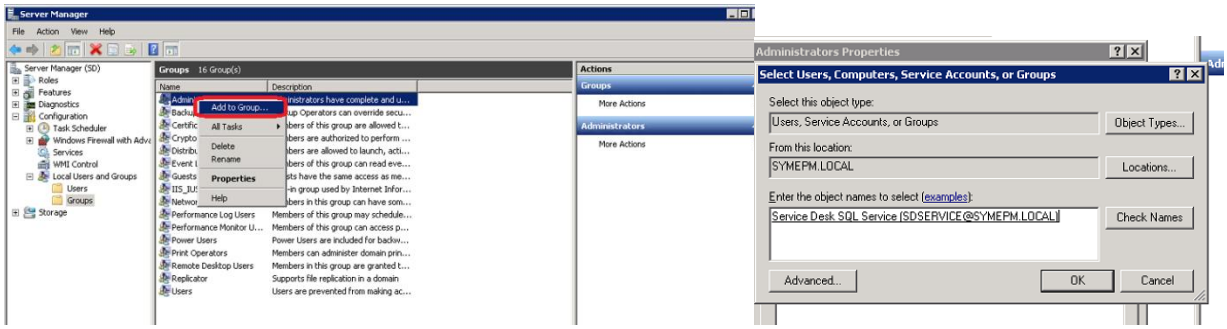
15) Move the slider all the way down to **Never Notify** and then click **OK**.



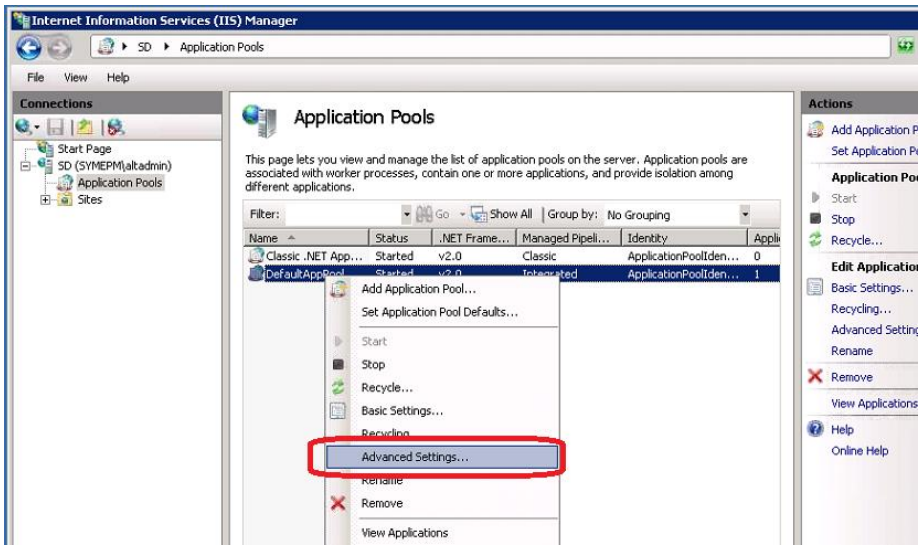
16) If the SQL Server Instance is not on the same server as the ServicDesk installation, install the following components on the ServiceDesk server (not the SQL Server, unless SQL is installed on the ServiceDesk server), which are required before install, These components are from the Feature Pack for Microsoft SQL Server 2005 - December 2008 or newer.
Note: Any other versions are not supported.

a. sqlncli_x64.msi - Microsoft SQL Server Native Client (from December 2008)
b. SQLServer2005_ADOMD_x64.msi - Microsoft SQL Server 2005 Analysis Services ADOMD.NET (from December 2008)
c. SQLServer2005_XMO_x64.msi - Microsoft SQL Server 2005 Management Objects Collection (from December 2008)

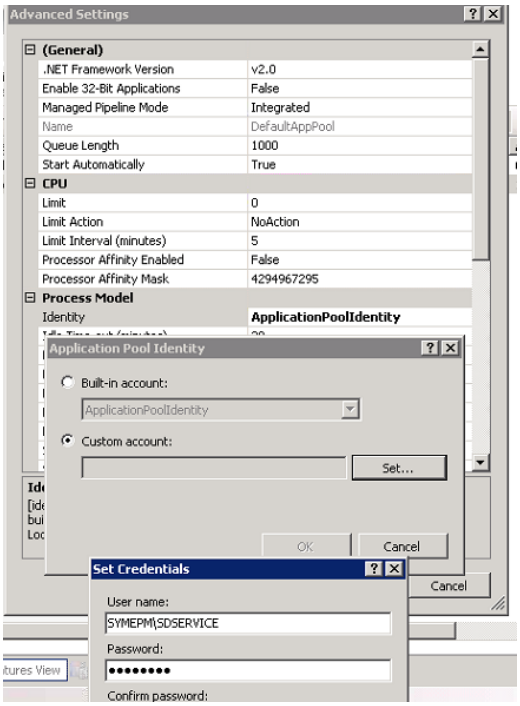
17) Launch the Windows 2008 **Server Manager** and drill down to Configuration > Local Users and Groups > **Groups**. Add the **ServiceDesk Service Account** to the local **Administrators** group.



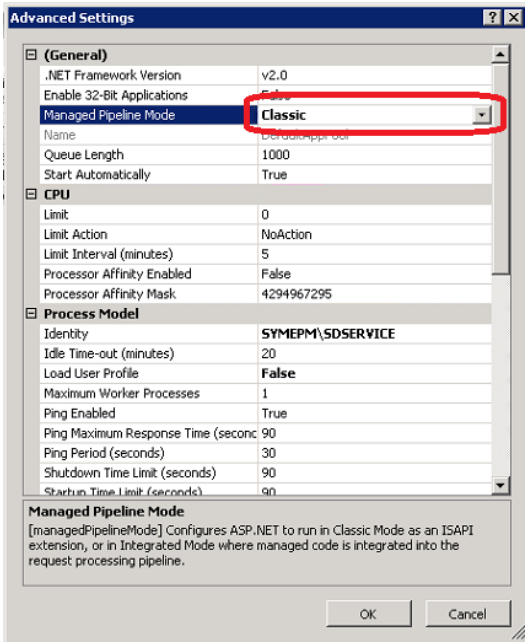
18) Launch the **Internet Information Services (IIS) Manager** and access the **Default AppPool**, **Advanced Settings**.



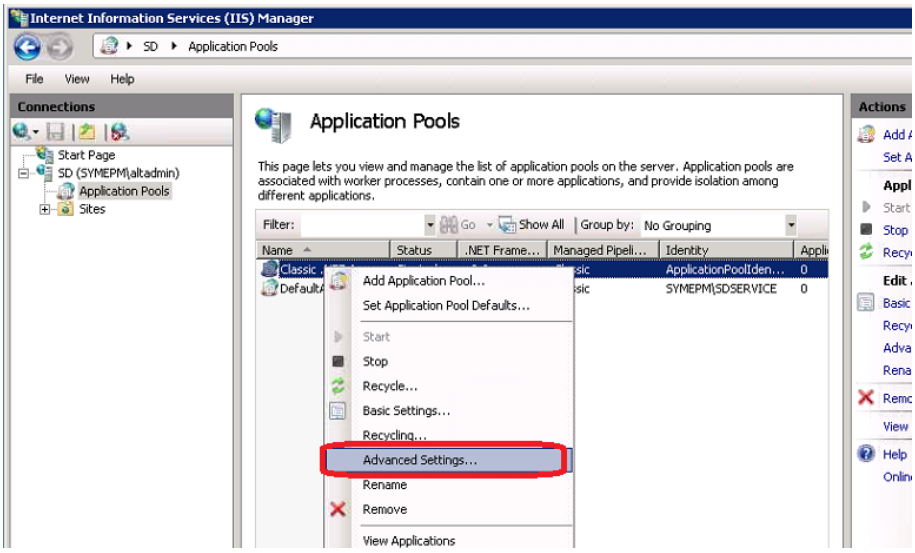
19) Change the Default Application Pool **Identity** to the **ServiceDesk Service Account**.



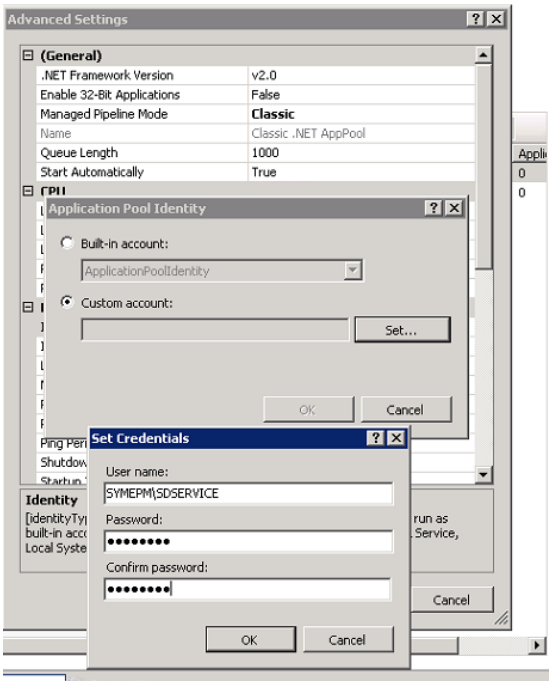
20) Change the Default Application Pool, **Managed Pipeline Mode** to **Classic**.



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



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



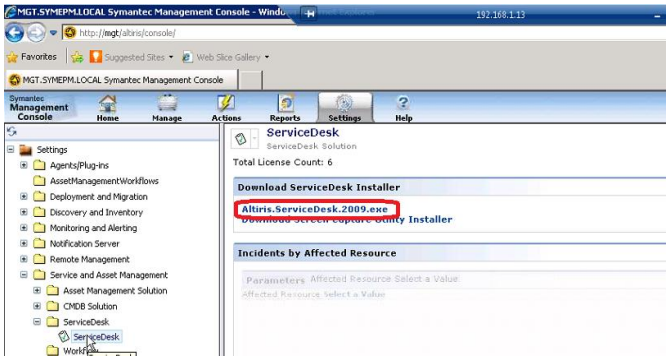
23)Reboot the server.

24)Login to the server with the Installation Account.

SERVICEDESK INSTALLATION PROCESS

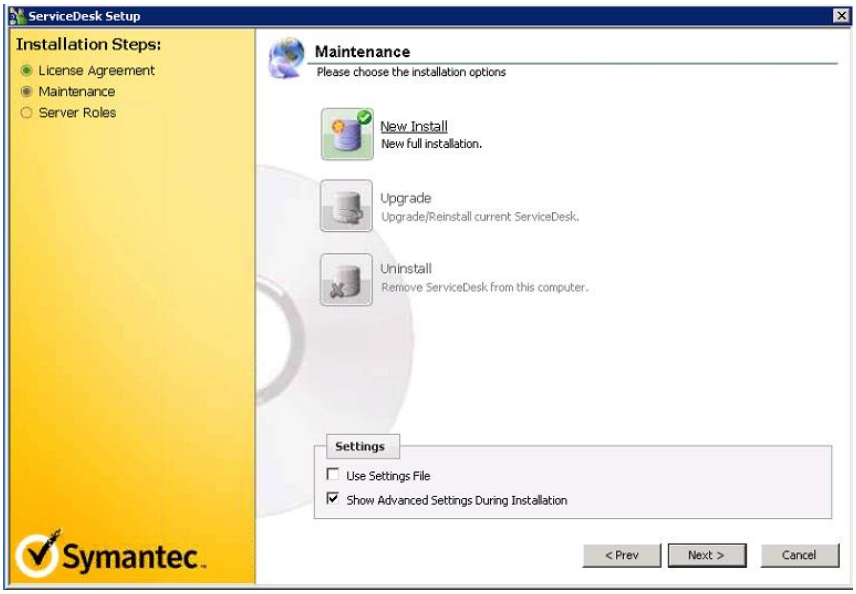
25) Browse to the SMP 7.1 Server using Internet Explorer

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 a local path on the server, preferably the desktop.

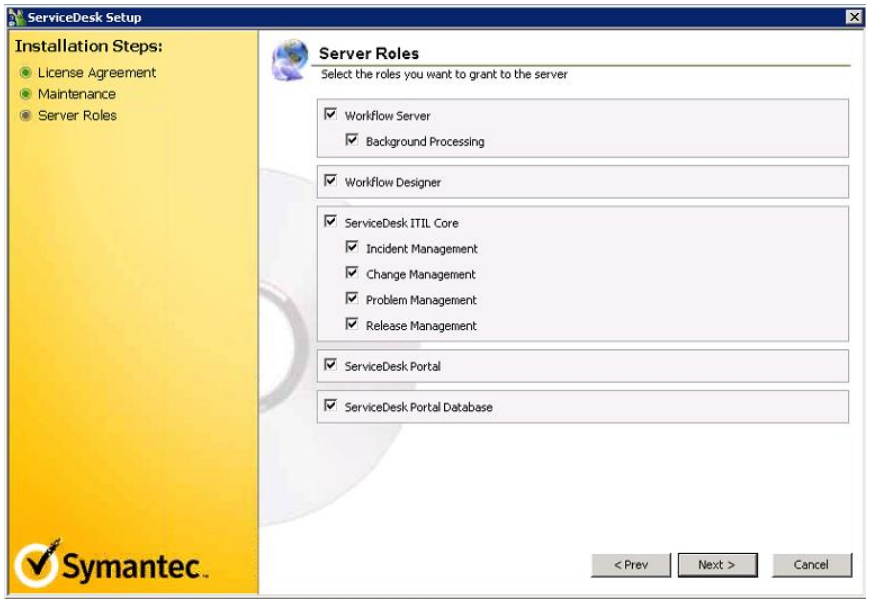


27) Execute the file downloaded in step 26.

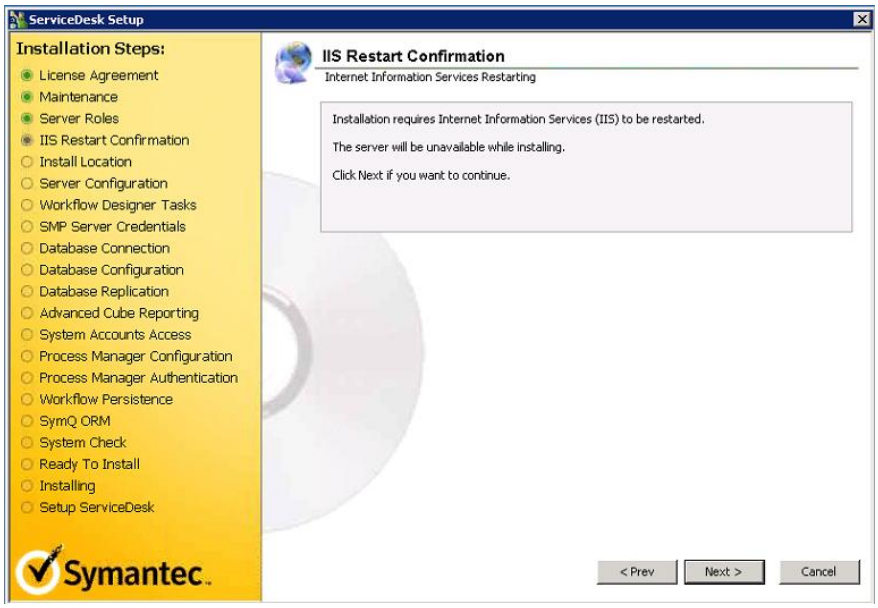
28) When the installer comes up, select **New Install** and select **Show Advanced Settings** before clicking **Next**.



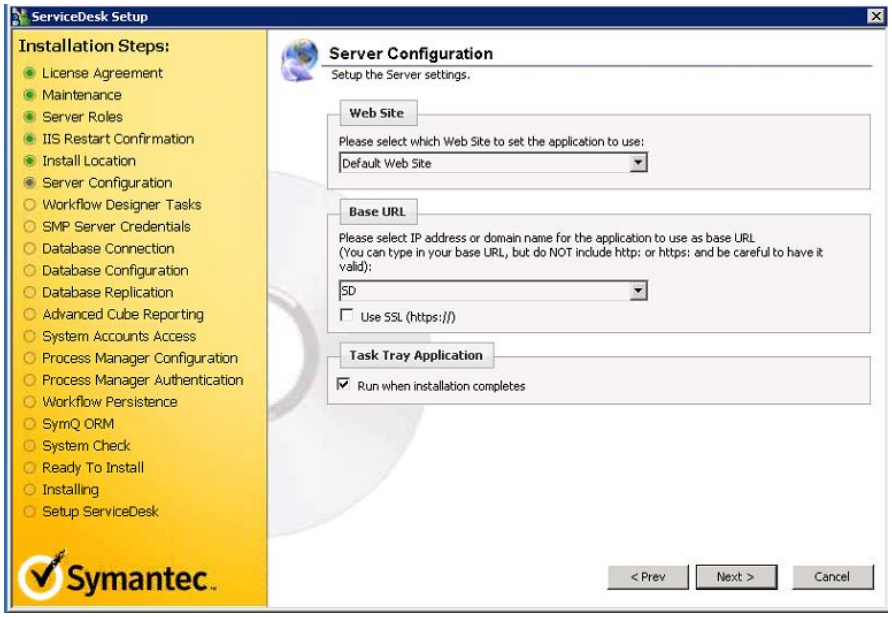
29)Select all components and click **Next**.



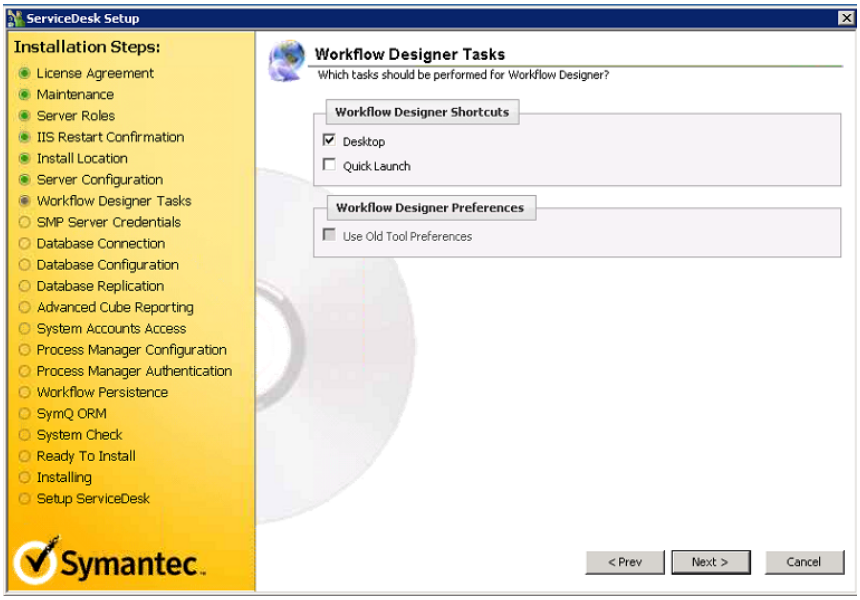
30)Click **Next** on confirm IIS Restart.



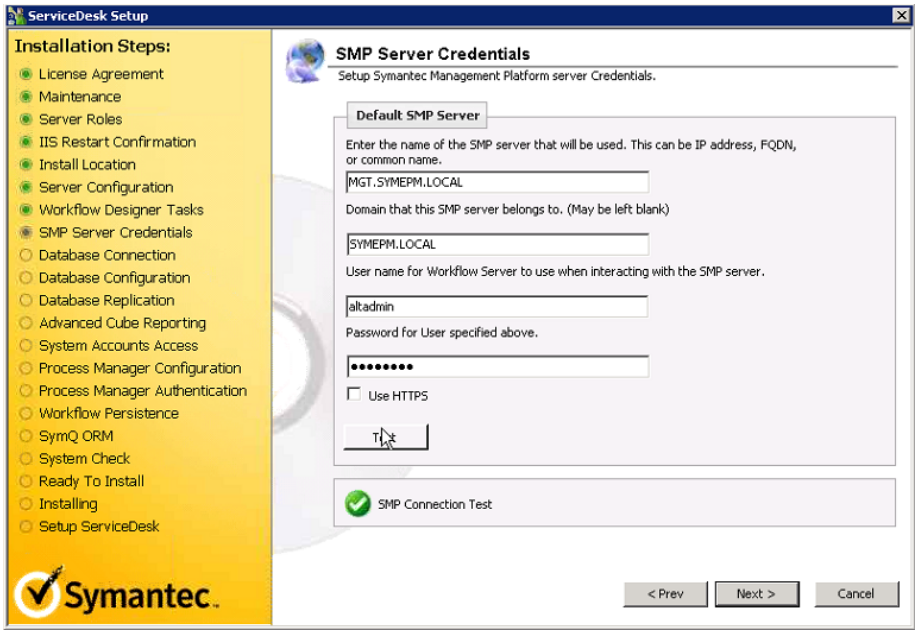
31) Set the Server Configuration for your ServiceDesk installation. Most leave the Web Site set to the Default Web Site. Set the Base URL to the address that you wish to use for ServiceDesk. You can user a FQDN, the IP address of the server, or just leave the NETBIOS equivalent as shown as the Base URL.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



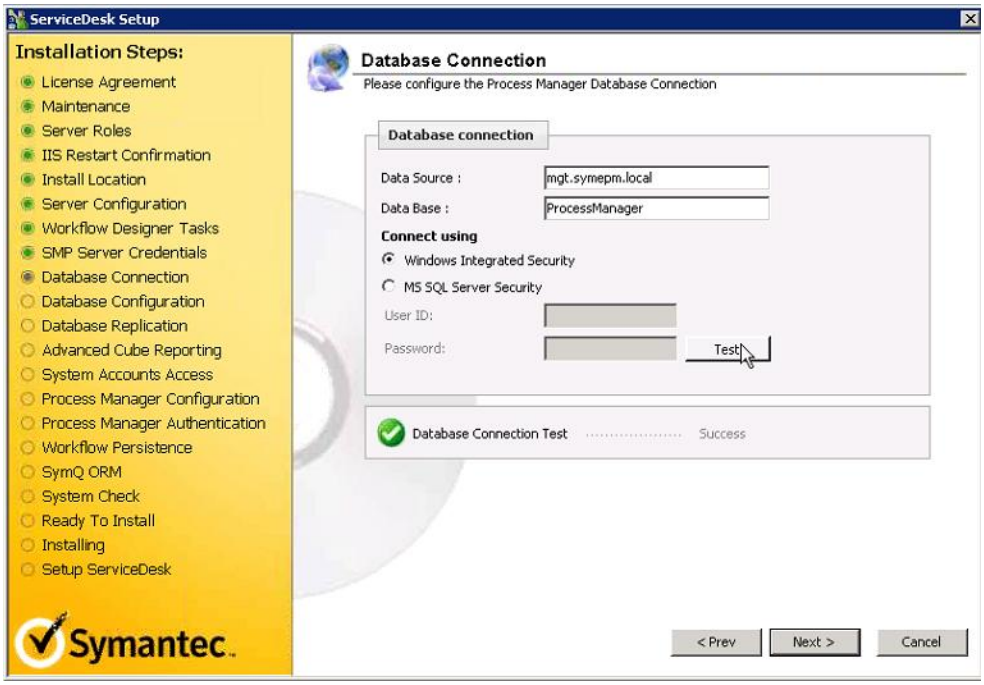
32) Leave the Workflow Designer Tasks at defaults and click **Next**.



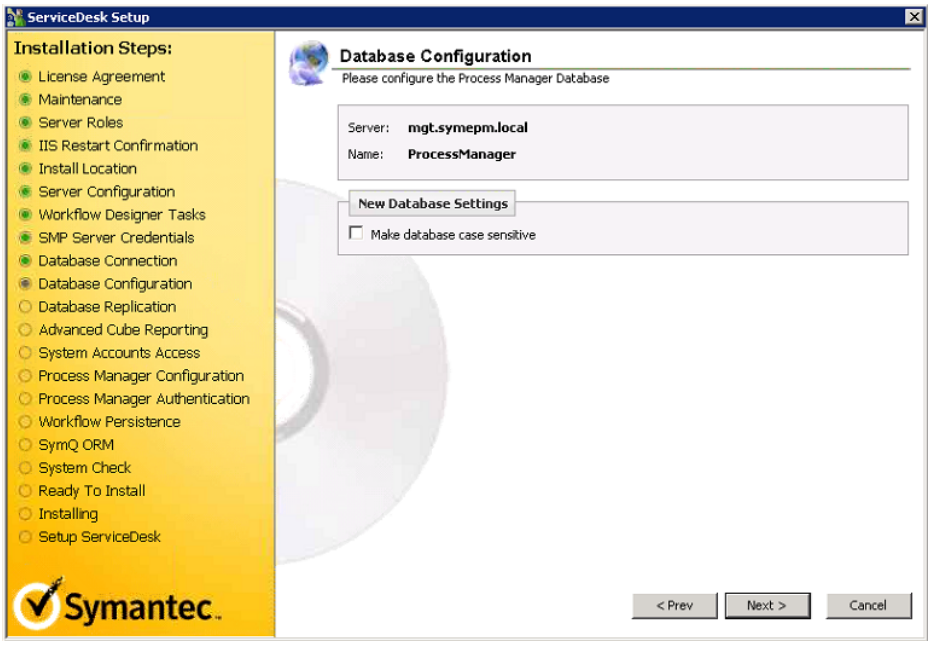
33) Configure the **SMP Server Credentials**. Make certain the test is successful before clicking **Next**.



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.

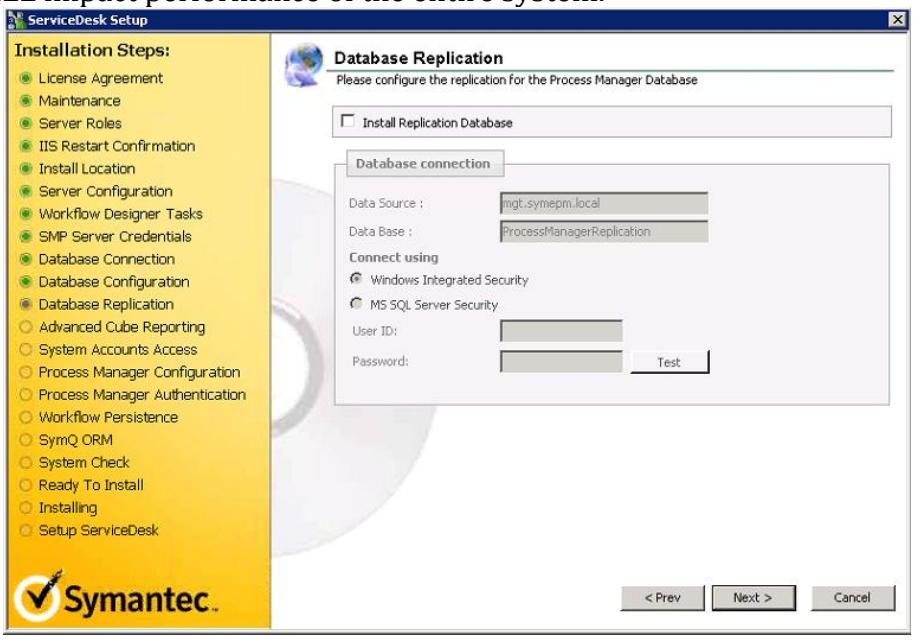


35) Review the database configuration (it is not recommended to make the database case sensitive) and then click **Next**.

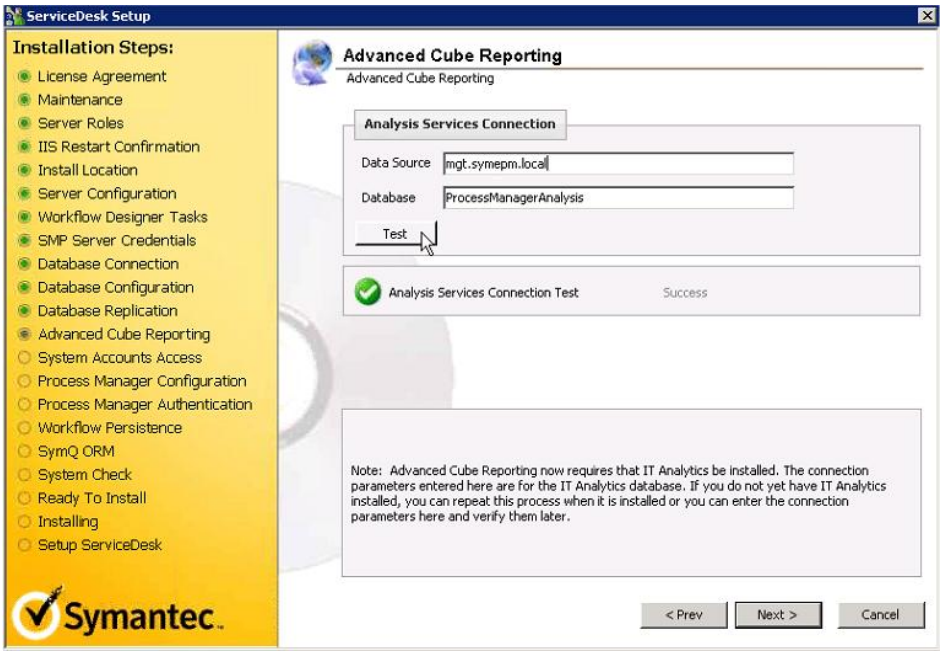


36) If database replication is required, configure the database replica and click **Next**.

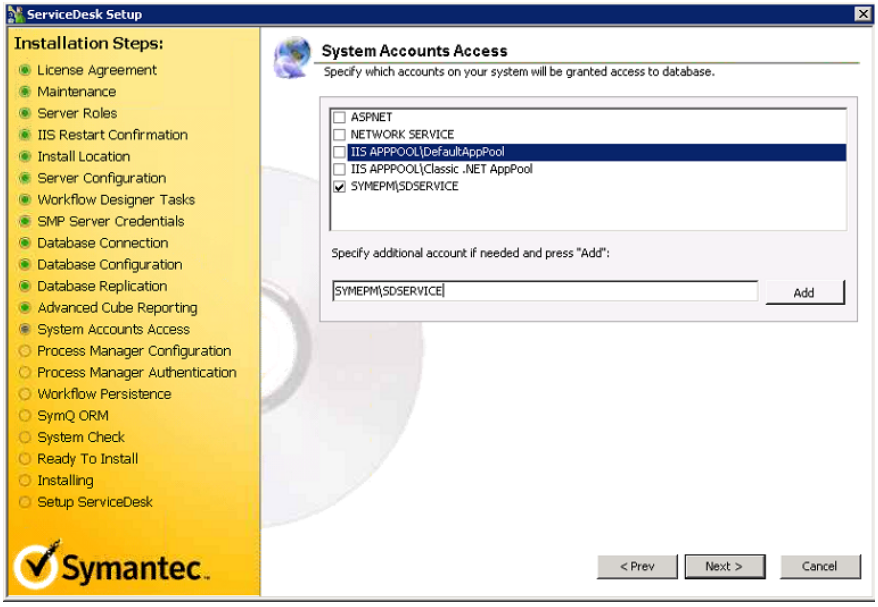
CAUTION: Database replication can adversely impact scalability and / or system responsiveness. Database replication should be directed to a separate SQL instance from the installation instance and the ServiceDesk Service Account requires SA rights on the target instance for the replica in order to install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

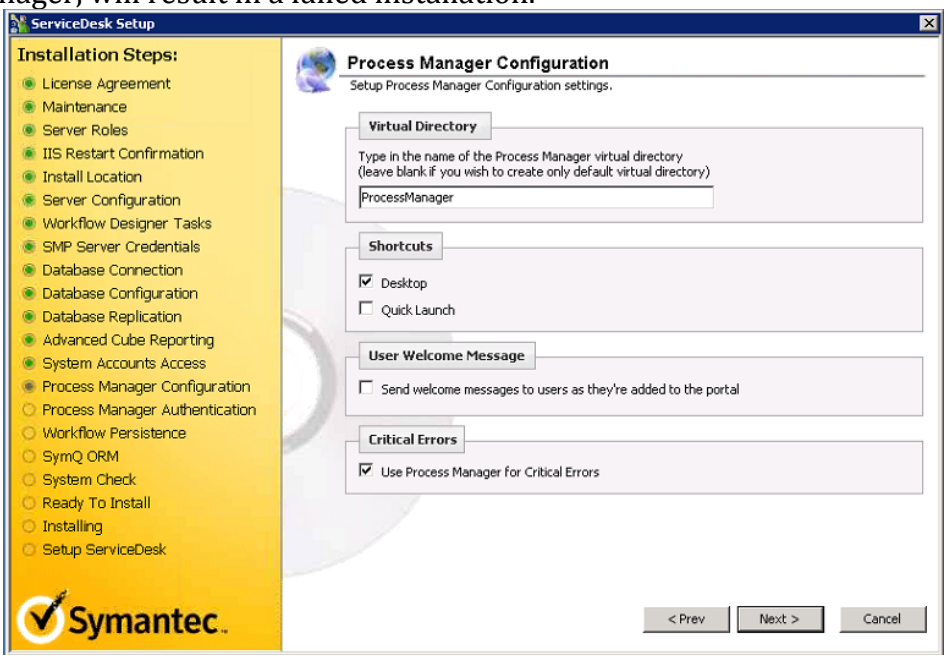


38) Configure **System Accounts Access** by **Removing checks from ALL items**. Then enter the ServiceDesk Service Account and use the add button to enter it in the list. Make certain ONLY the ServiceDesk Service Account is checked before clicking **Next**.



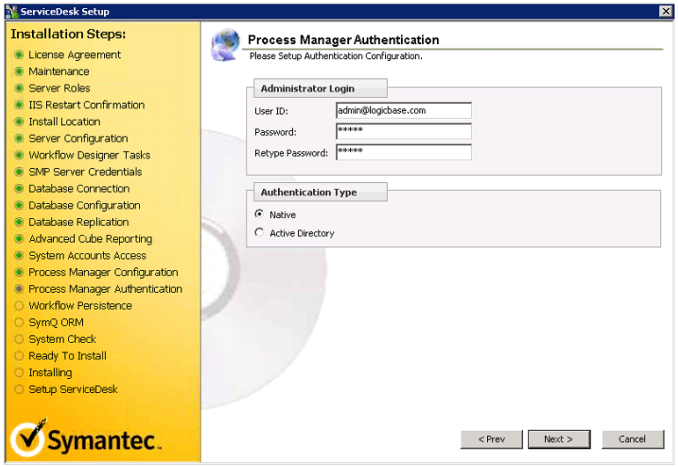
39) Review the **Process Manager Configuration**.

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

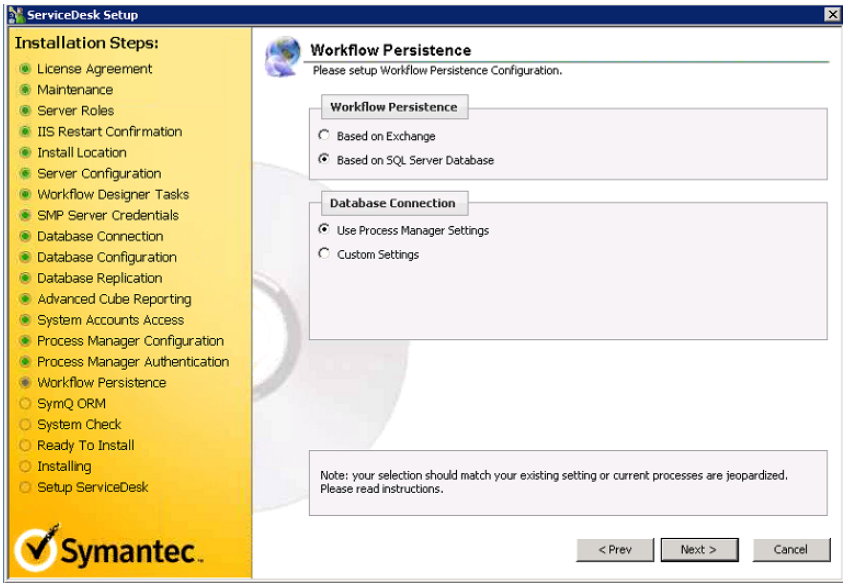


40) Review the **Process Manager Authentication**.

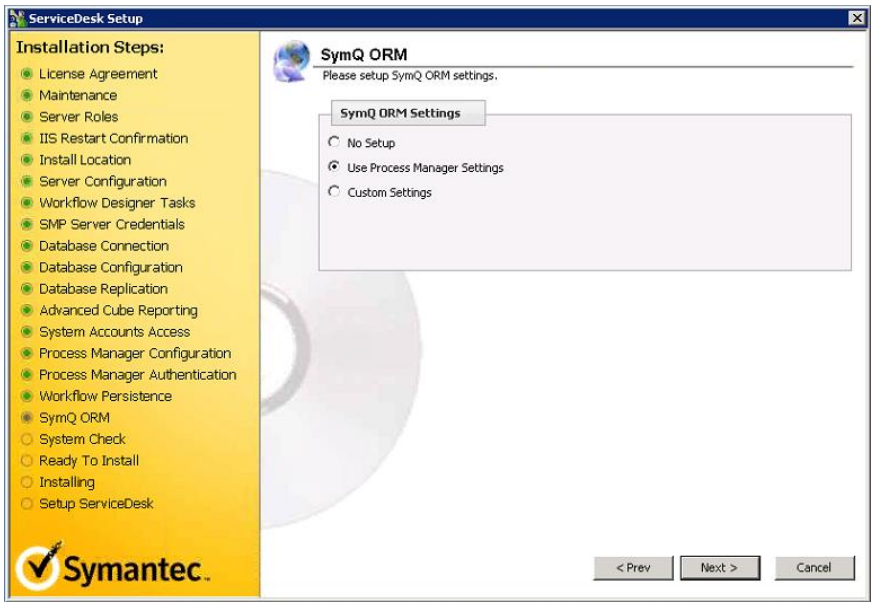
NOTE: At the time of this document, changing the Administrator Login password or name will result in a failed installation. If the administrator login password needs to be changed, this should be done after the installation is completed.
www.symantec.com/docs/TECH146586
NOTE: At the time of this document,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



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

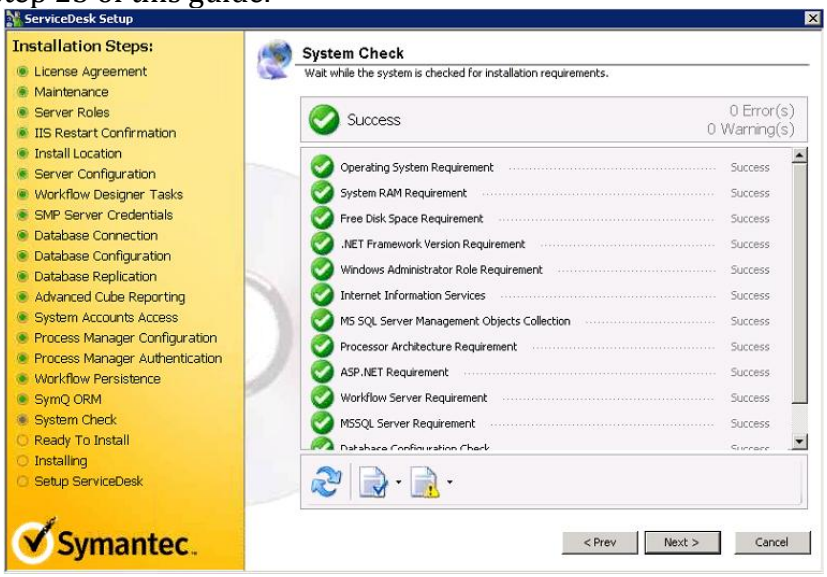


42)Review the SymQ ORM settings, leave at defaults and click **Next**.

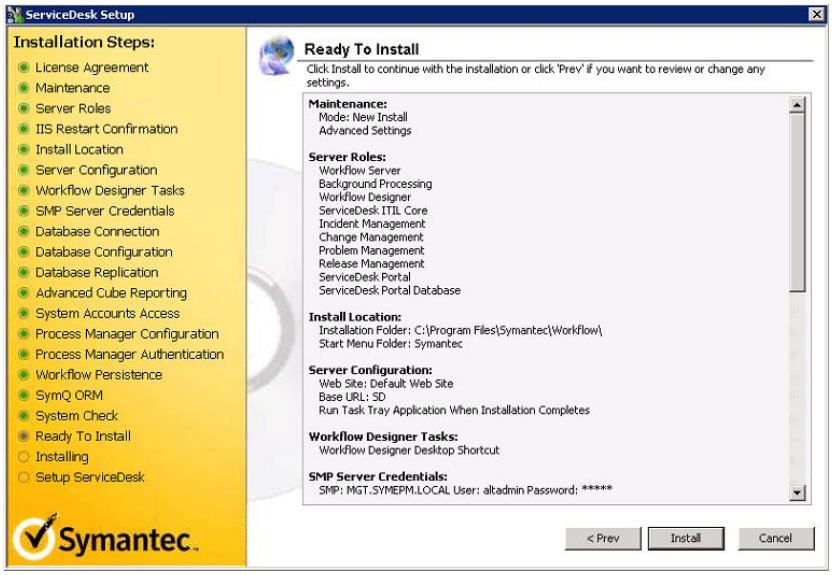


43) Review the System Check to make certain all tests pass and click **Next**.

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

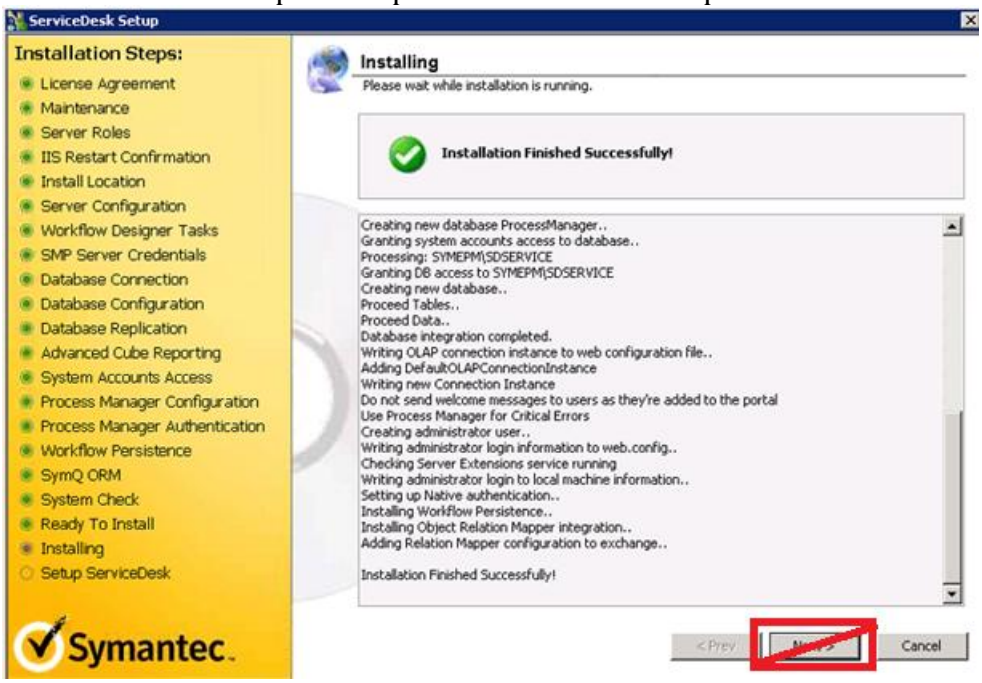


44) Review the summary and click **Install**.

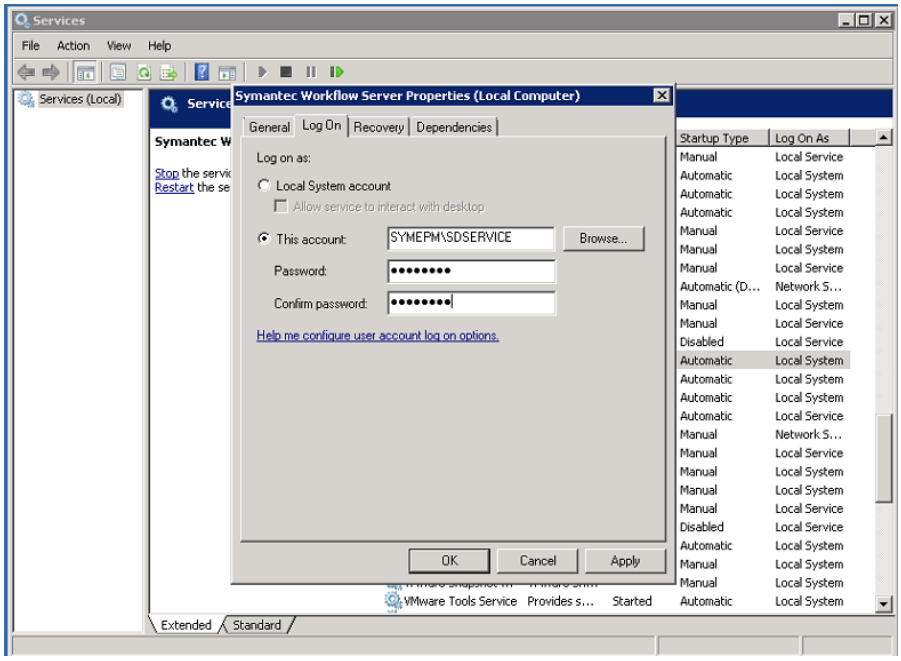


45) **DO NOT CLICK NEXT.**

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. 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

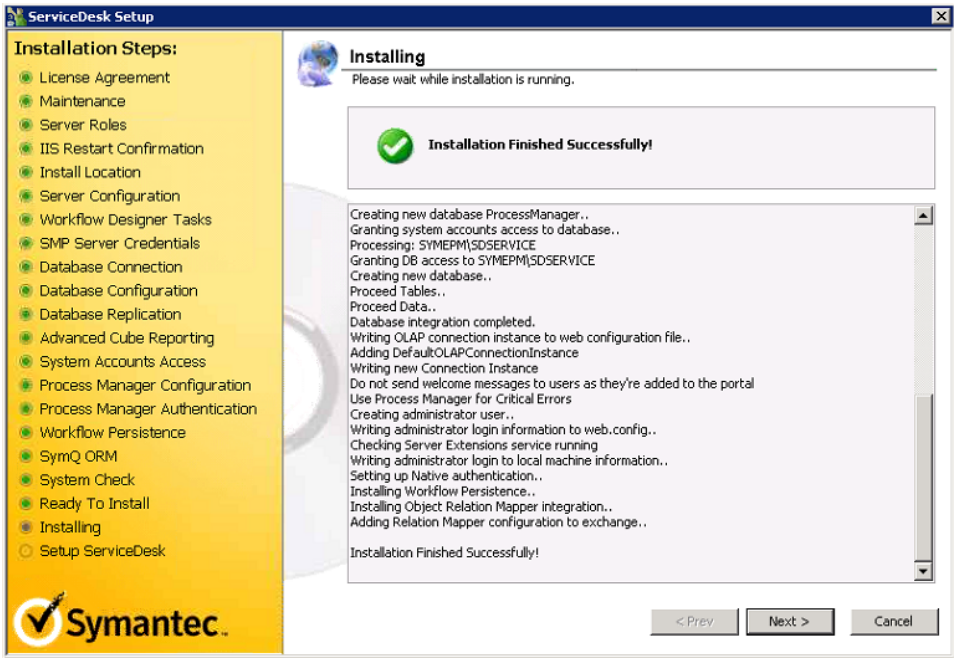
```
 DELETE FROM TaskResponse WHERE [URL] LIKE '%&dialogModel=Start+PC+Anywhere%' AND
URL LIKE '%SD.IncidentManagement%'
```

-- END SQL SCRIPT

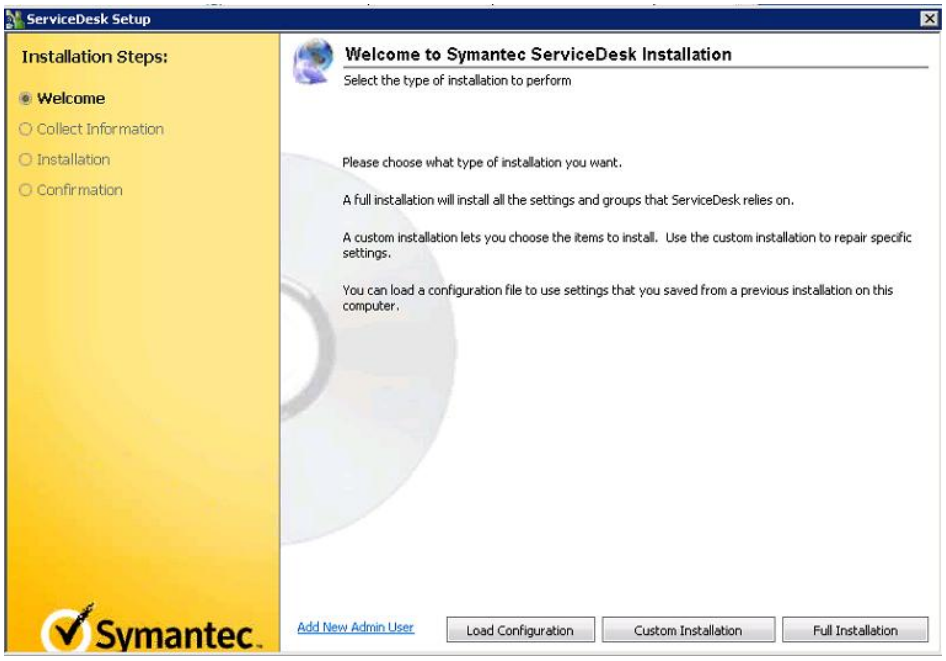
This is documented in the KB article found at http://www.symantec.com/docs/TECH155863.

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.

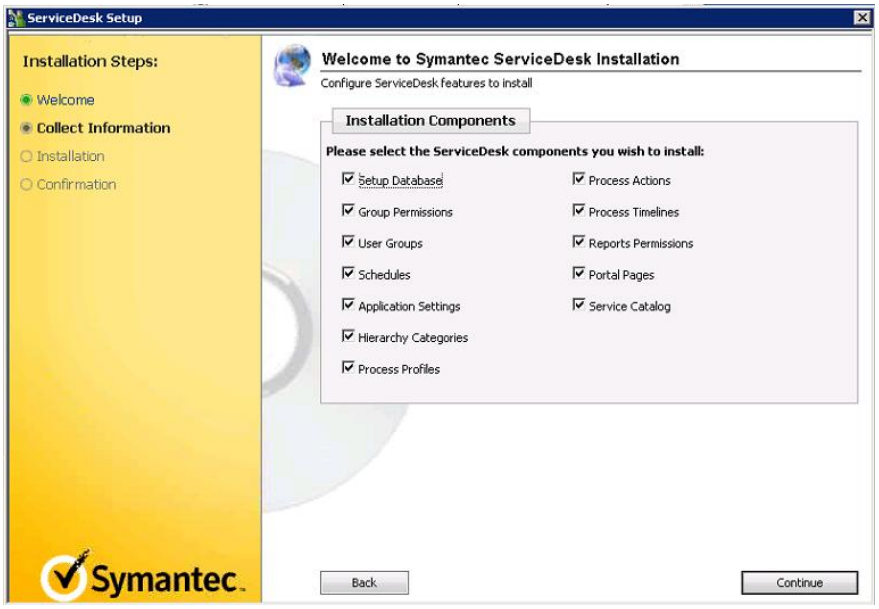
47) Return to the ServiceDesk Setup screen and click **Next**.



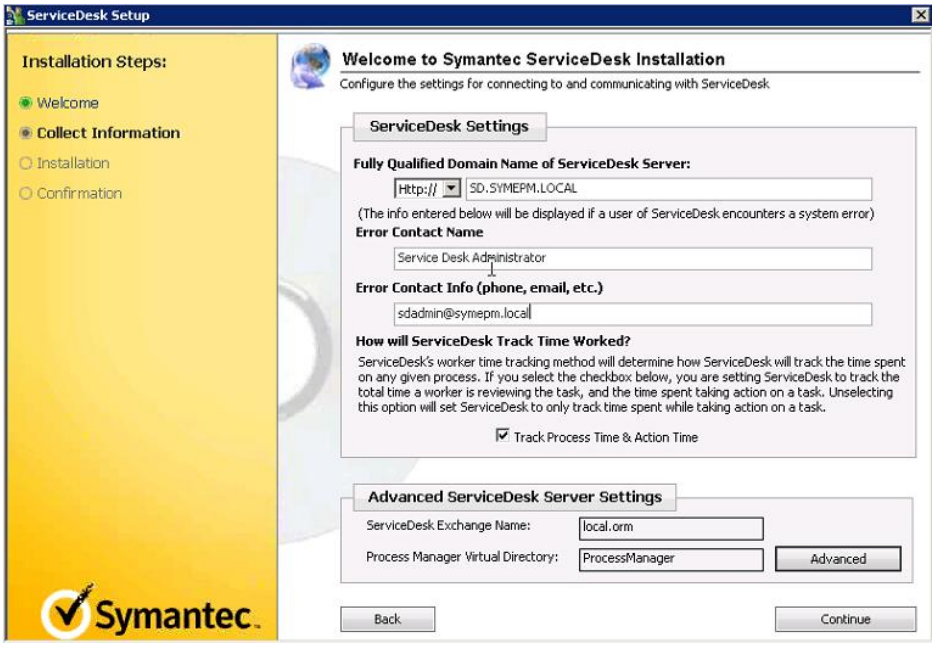
48) When the ServiceDesk Installation launches, click **Custom Installation**.


ServiceDesk Setup
Installation Steps:
Welcome
Collect Information
Installation
Confirmation
Symantec
Welcome to Symantec ServiceDesk Installation
Select the type of installation to perform
Please choose what type of installation you want.
A full installation will install all the settings and groups that ServiceDesk relies on.
A custom installation lets you choose the items to install. Use the custom installation to repair specific settings.
You can load a configuration file to use settings that you saved from a previous installation on this computer.
Add New Admin User
Load Configuration
Custom Installation
Full Installation

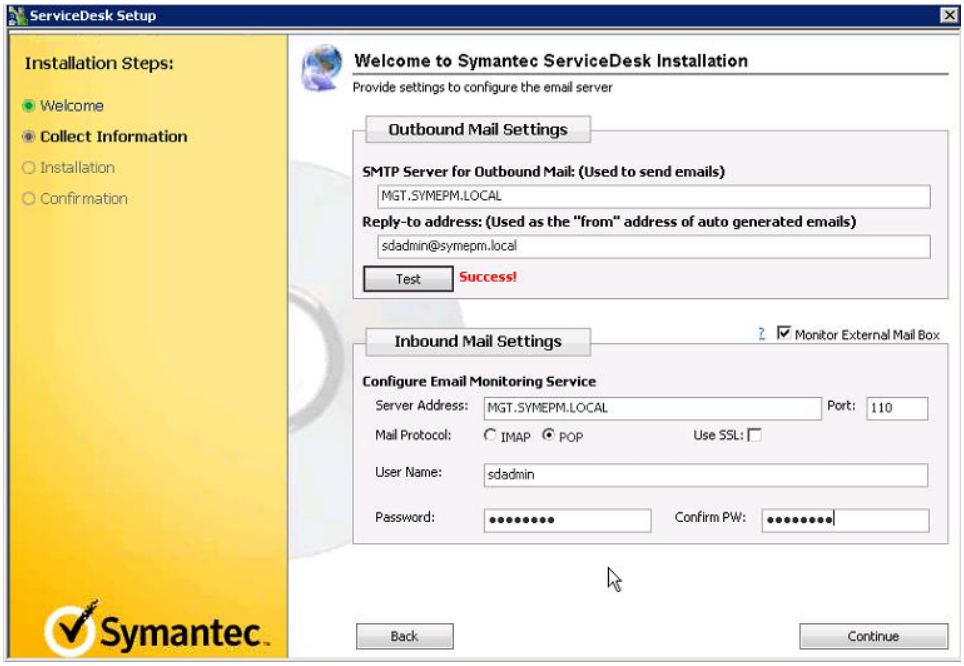
49) Review the **Installation Components** and click **Continue**.



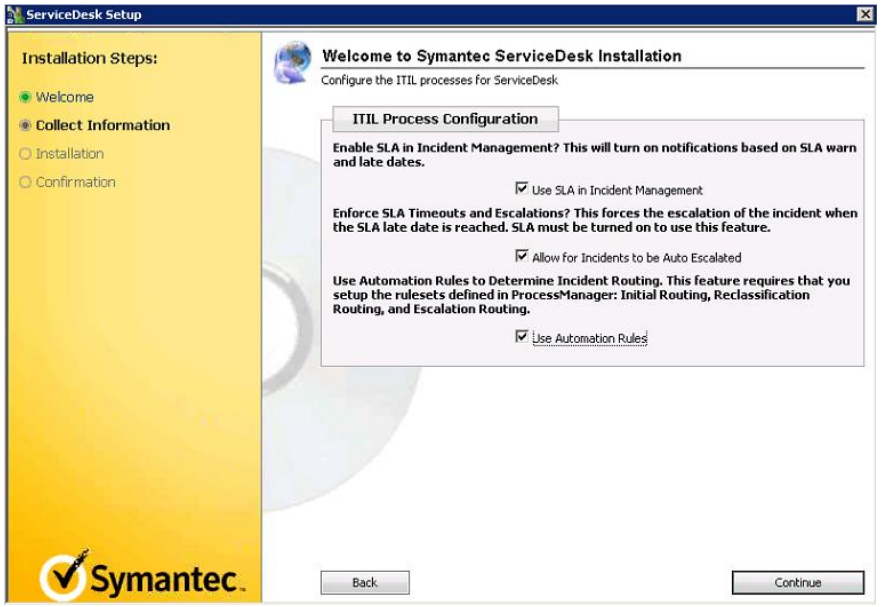
50) Configure the **ServiceDesk** settings and click **Continue**.



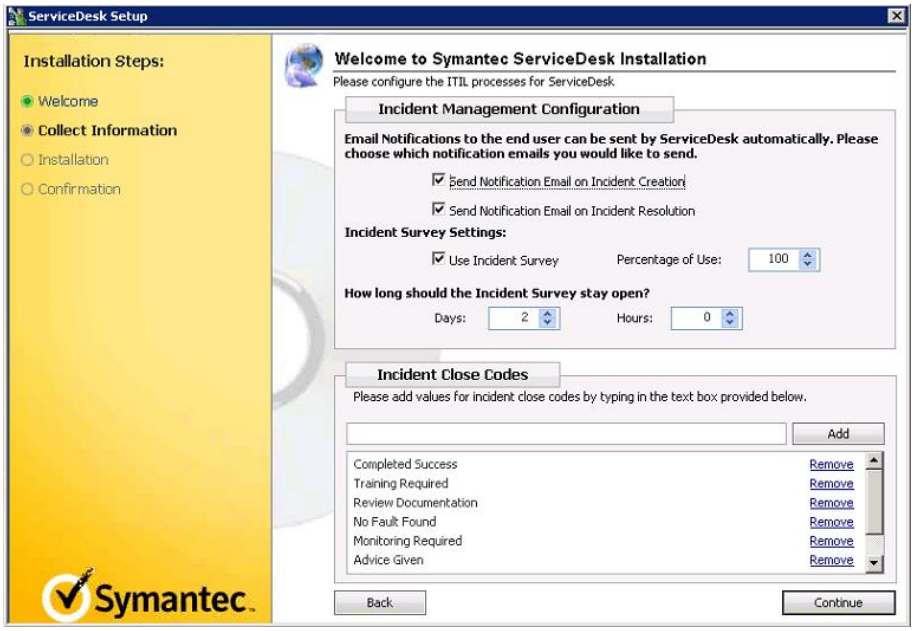
51)Confiure e-mail settings. Make certain the SMTP test passes before clicking **Continue**.



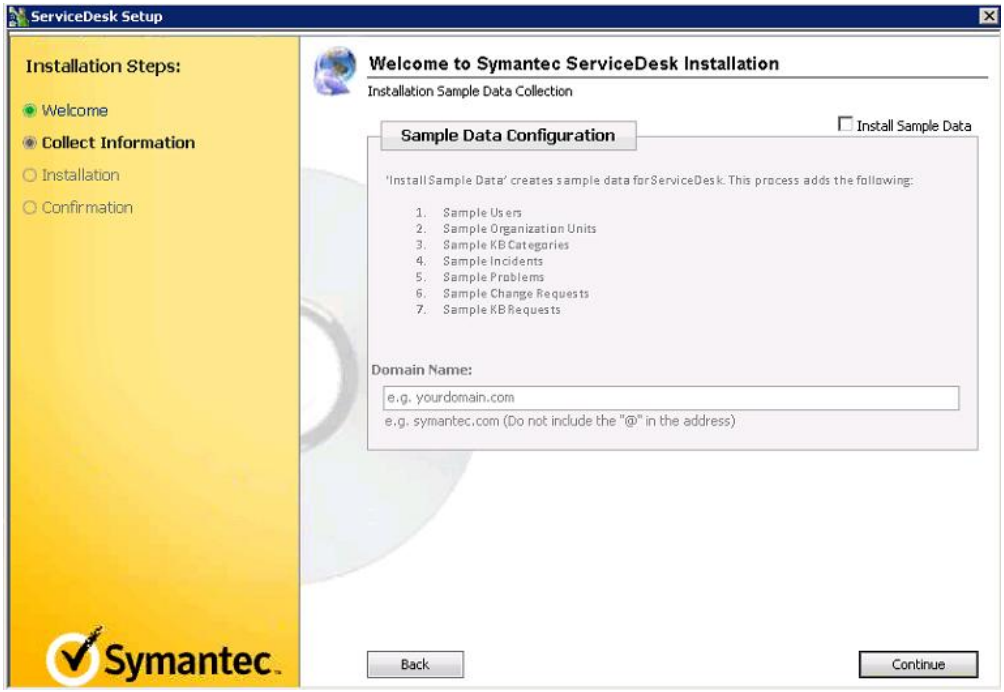
52)Select the **ITIL Process Components** to be leveraged and then click **Continue**.



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

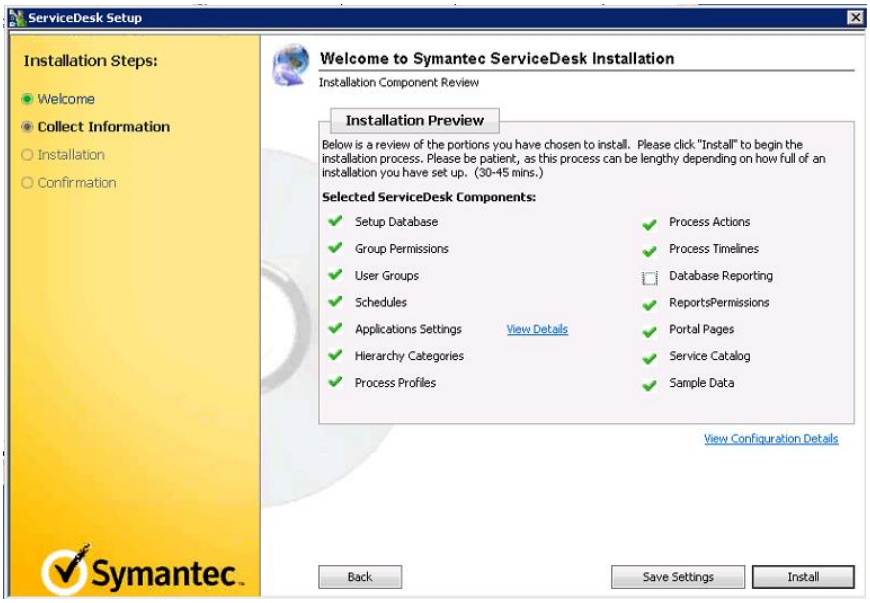


54) Do not include sample data if this is a production system install. Click **Continue**.

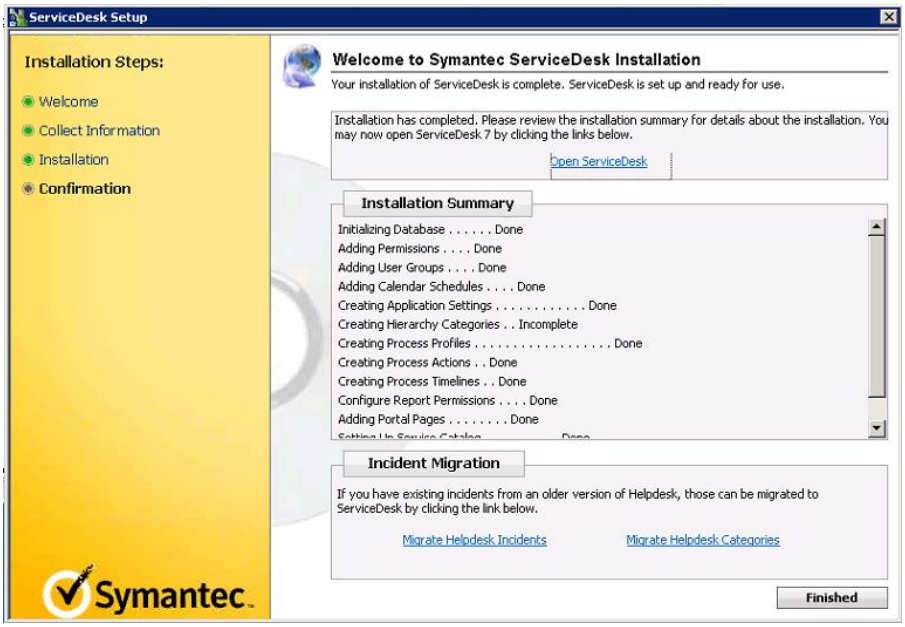


55) Review the installation and click **Install**.

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.



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

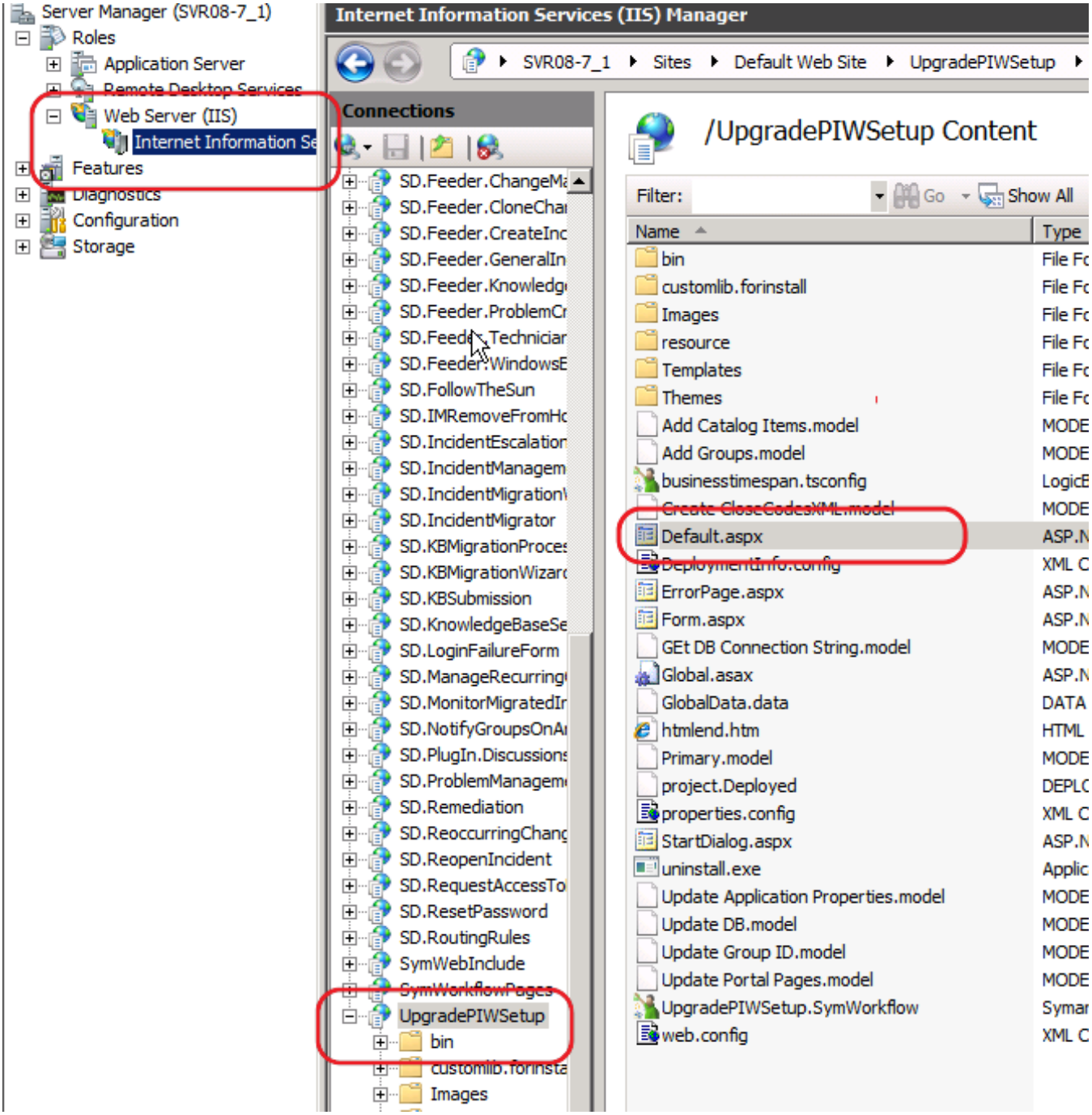


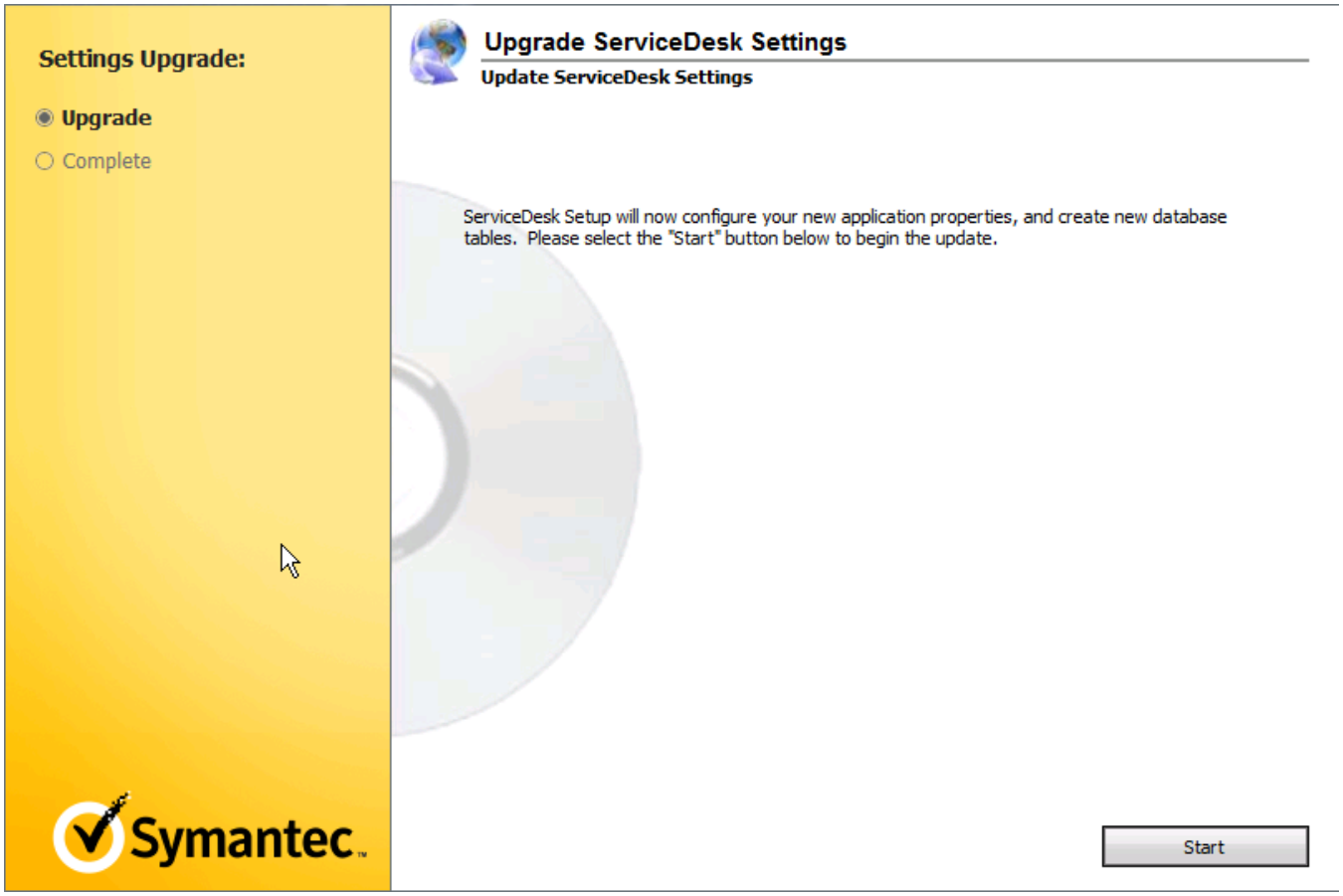
57) Launch Processmanager and login with admin@logicbase.com password admin.

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

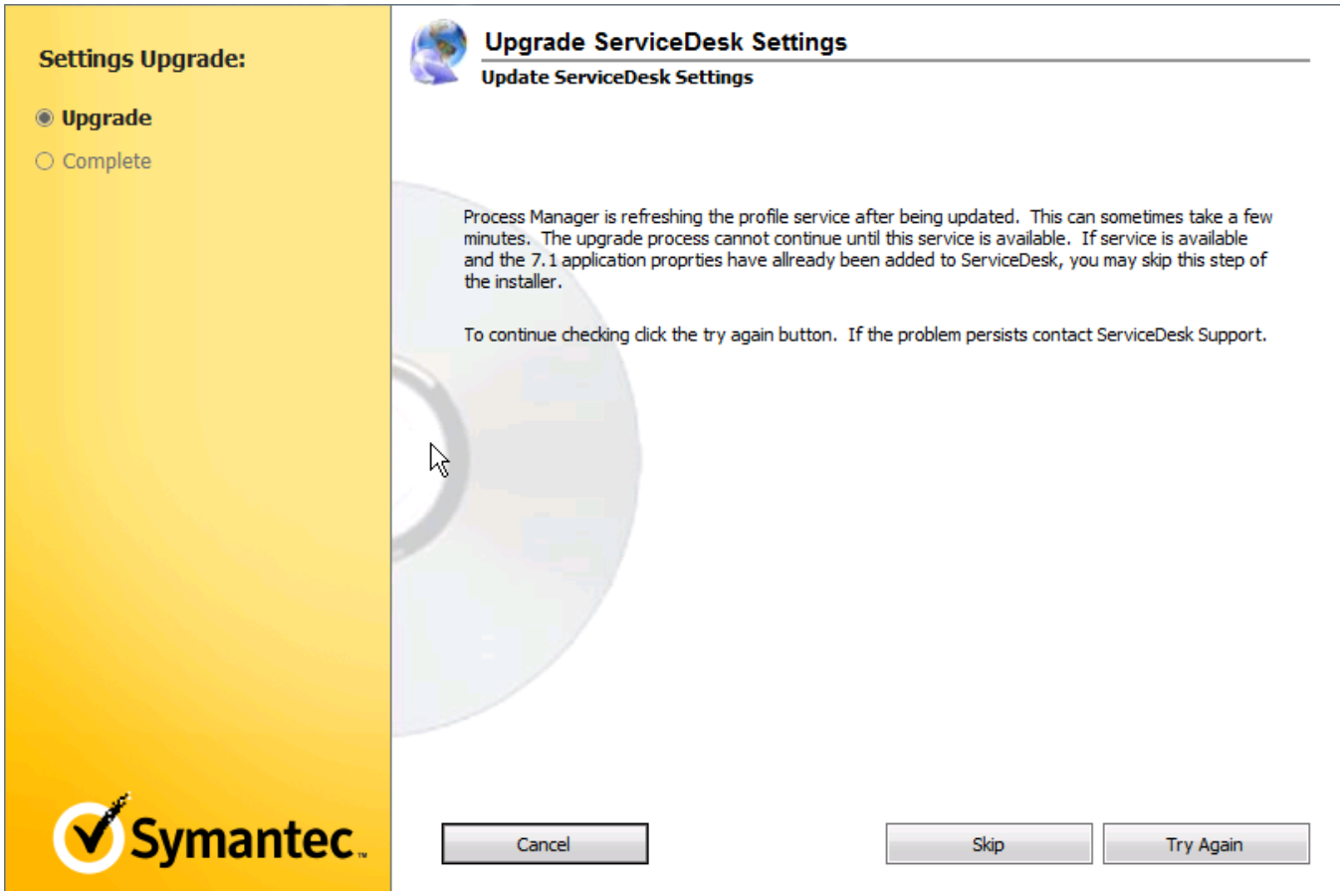
SERVICEDESK UPGRADE PROCESS

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.

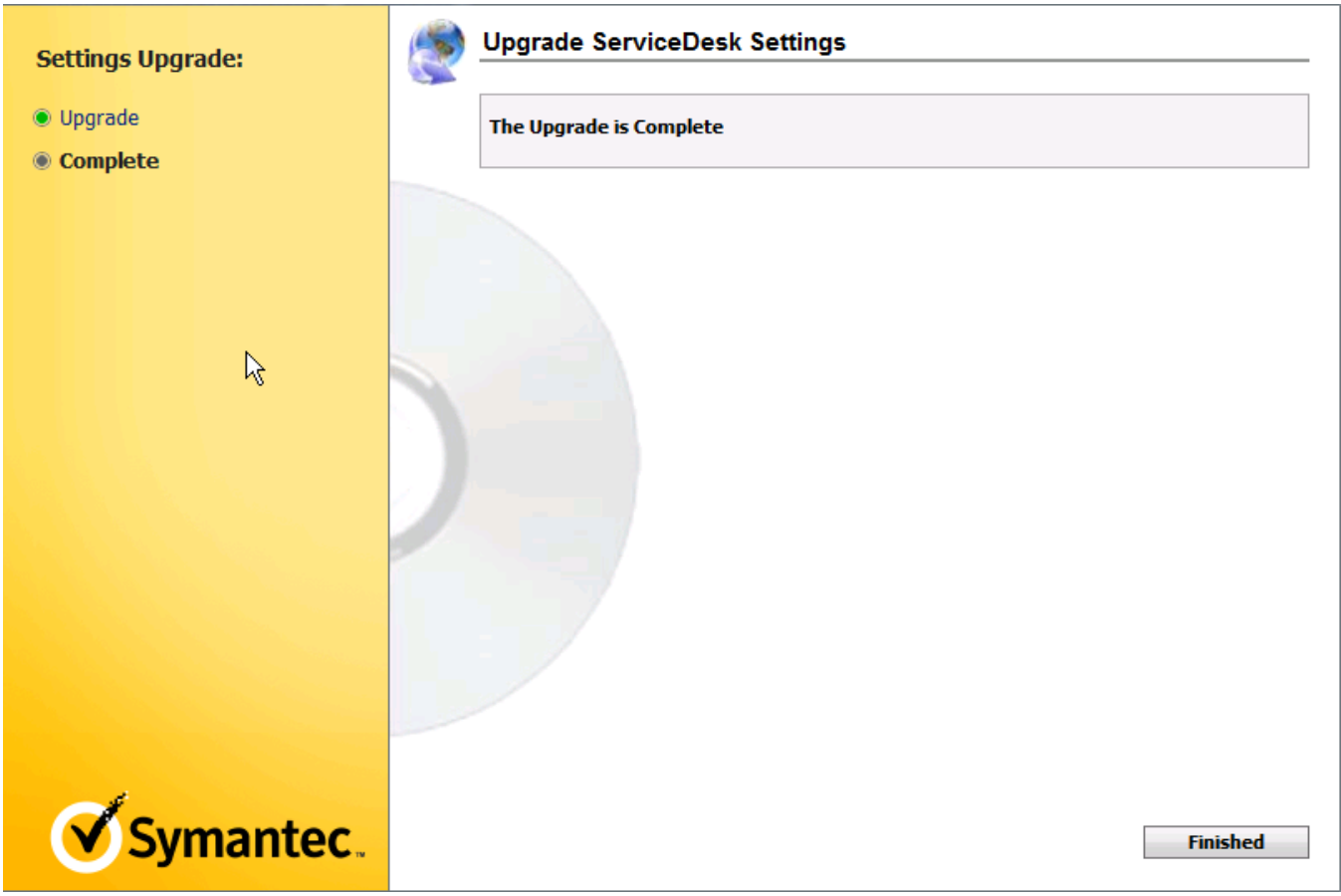

Server Manager (SVR08-7_1)
Roles
Application Server
Remote Desktop Services
Web Server (IIS)
Internet Information Se
Features
Diagnostics
Configuration
Storage
Internet Information Services (IIS) Manager
SVR08-7_1 ▸ Sites ▸ Default Web Site ▸ UpgradePIWSetup ▸
Connections
SD.Feeder.ChangeMa
SD.Feeder.CloneChar
SD.Feeder.CreateInc
SD.Feeder.GeneralIn
SD.Feeder.Knowledg
SD.Feeder.ProblemCr
SD.Feeder.Technician
SD.Feeder.WindowsE
SD.FollowTheSun
SD.IMRemoveFromHc
SD.IncidentEscalation
SD.IncidentManagem
SD.IncidentMigration
SD.IncidentMigrator
SD.KBMigrationProces
SD.KBMigrationWizarc
SD.KBSubmission
SD.KnowledgeBaseSe
SD.LoginFailureForm
SD.ManageRecurring
SD.MonitorMigratedIr
SD.NotifyGroupsOnA
SD.PlugIn.Discussions
SD.ProblemManagem
SD.Remediation
SD.ReoccurringChang
SD.ReopenIncident
SD.RequestAccessTo
SD.ResetPassword
SD.RoutingRules
SymWebInclude
SymWorkflowPages
UpgradePIWSetup
bin
customlib.forinsta
Images
/UpgradePIWSetup Content
Filter:
Go
Show All
Name
Type
bin
customlib.forinstall
Images
resource
Templates
Themes
Add Catalog Items.model
Add Groups.model
businesstimespan.tsconfig
Create CloseCodesXML.model
Default.aspx
DeploymentInfo.config
ErrorPage.aspx
Form.aspx
GEt DB Connection String.model
Global.asax
GlobalData.data
htmlend.htm
Primary.model
project.Deployed
properties.config
StartDialog.aspx
uninstall.exe
Update Application Properties.model
Update DB.model
Update Group ID.model
Update Portal Pages.model
UpgradePIWSetup.SymWorkflow
web.config



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 proprties have allready 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.