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# Part 1 – Deployment Server and Database Setup

### **Deployment Server Installation Prerequisites:**

- Microsoft .Net Framework 4.0 is required for the installation of ServicePRO.
- A valid Internet connection is required to activate the ServicePRO software. If one is not present, you- will be required to email an XML file created by the installation software to activate ServicePRO. Once this file is created, you will email it to hsupgrade14@helpstar.com and another XML file will be sent to apply to your ServicePRO installation.
- Windows Installer must be updated to Version 4.5 prior to installing the application. It is recommended to do this beforehand as this update requires a reboot of the server. For more information, visit the link below:
- http://support.microsoft.com/kb/942288
   Ensure that SQL Server is installed prior to the installation.
   Supported versions are:

SQL Server 2008 R2 (Express, Standard and Enterprise Edition)  $\circ$ 

SQL Server 2012 (Express, Standard and Enterprise Edition)

- Note: SQL server should be set at "Case Insensitive" and "Dictionary Sort"
  - SQL Server FullText Search Service must be running as a pre-requisite for global
  - Search functionality
- 64-Bit versions are supported
- During installation of SQL Server, note the mode selected for authentication (Windows Authentication- or SQL). If using SQL authentication, the SA password will be required to create the ServicePRO database.
- SQL Server Full Text Search Service must be started on the database server for the use of the global search functionality.

# **Deployment Server Installation:**

- 1. On the server that will be hosting the ServicePRO application, run the evaluation file.
- 2. When prompted, enter the installation password. Click OK.

**Note**: To proceed with the installation- It is strongly recommended that you exit all windows programs before running this installation.

Please enter the password		
Password:		
OK.	Cancel	



ServicePRO Deployment Server			
<b>L</b> SEI	RVICE <b>PR</b>	0°	
		Web Components Utlook Integration Screen Sharing	Starwatch Service Starwatch Service Business Rules Engine Network Audit Engine
Deployment Server	Database Configuration	Optional Server Co	omponents
It is strongly recommended that you exit all Windows programs before running this installation. Click Next to Continue.			
InstallShield			Next > Cancel
an menantian anan al			

3. To proceed with the installation, review and accept the license agreement terms. Click Next.

4. Specify the location in which the ServicePRO Deployment Server files will reside. A default location is provided (C:\HelpSTAR\). This can be altered by clicking on the Browse button. Click Next.

ServicePRO Deployment Server			
SE	RVICE <b>PR</b>	0°	
	9	Web Components	Starwatch Service
		Outlook Integration	Business Rules Engine
		Screen Sharing	Network Audit Engine
1 Deployment Server	2 Database Configuration	Optional Server Co	monants
License Agreem	· · · · · · · · · · · · · · · · · · ·	Optional Server Co	inponents
RENT <sup>2</sup> OWN™ AGREEMENT			
	rms of the license agreement t the terms of the license agreemer		
InstallShield		< <u>B</u> ack	Next > Cancel



### Database Setup for SQL Authentication:

1. Upon completion of the Deployment Server installation, the ServicePRO database setup will begin. A prompt to "Configure Database" will appear (as shown below).



The following fields must be entered to configure your ServicePRO Database:

- a. Server Name: Enter the name or IP address of your SQL server.
- b. Use Port #: Port 1433 will be used by default. To select a different port, check- this box and it will allow you to enter Port # of your choice.
- c. Authentication: Select the desired authentication mode for connecting to SQL Server.
- d. **Login:** The use of a SA user login will be required when configuring your ServicePRO database for SQL Authentication.
- e. Password: Enter your SA password.
- f. **Backup Path:** A database can be restored to ServicePRO with pre-populated configurations. This database will be stored in the default location specified here. This is hard-coded and cannot be edited.
- g. Domain Login/Password: Enter your domain login and password.

2. Click on Configure when all information has been entered. 3. The database setup will proceed.

4. The User will be shown the prompt below to get confirmation on Parallelism Settings; the user should check with their DBA to confirm if they are giving permission to do this setting or not. Max degree of parallelism refers to maximum CPU threads for a single query, and cost threshold for parallelism is the point at which a query will use an additional thread. The database server's advanced settings for parallelism can only be configured with the user's permission, by agreeing to the prompt, as shown below.





Database I	Jpdate	23
?	For optimum performance of ServicePRO application, the following advanced SQL Server settings are recommended.	
	1) max degree of parallelism => 2 2) Cost Threshold for parallelism => 25	
	Do you agree to have these advanced SQL Server settings done by the ServicePRO Database Upgrade Program?	1
	<u>Y</u> es <u>N</u> o	

- 5. A prompt confirming database creation has been completed will appear.
- 6. Click on OK to exit the database setup. Upon completion, you will be prompted to activate ServicePRO.

#### **Database Setup for Windows Authentication**

1. Upon completion of the Deployment Server installation, the ServicePRO database setup will begin. A prompt to "Configure Database" will appear (as shown below).

Database Setup Complete	
The ServicePRO database has been successfully configured! For reference: .SQL database name = HS2000CS .First Group User = WIN-CQ0RPGHCJKD\Administrator Now you will be prompted to activate ServicePRO.	
OK	

- 2. The following fields must be entered to configure your ServicePRO Database:
- 3. Server Name: Enter the name or IP address of your SQL server.
- 4. Use Port #: Port 1433 will be used by default. To select a different port, check this box and it will allow you to enter a Port # of your choice.
- 5. Authentication: Select the desired authentication mode for your ServicePRO Server.
- 6. First Group/User: Enter a group or user that will be authenticated to the ServicePRO database.
- 7. Backup Path: A database can be restored to ServicePRO with pre-populated configurations. This database will be stored in the default location specified here. This is hard-coded and cannot be edited.

8. Domain Login/Password: Enter your domain login and password. 9. Click on Configure when all information has been entered.

Help Desk Technology



10. The database setup will proceed.



11. The User will be shown the below prompt to get confirmation on Parallelism Settings. The user should check with their DBA to confirm permission for this setting. The database server's advanced settings for parallelism can **only be configured with the user's permission**, by agreeing to the prompt, as shown below.

Database	Update	23
?	For optimum performance of ServicePRO application, the following advanced SQL Server settings are recommended.	
	1) max degree of parallelism => 2 2) Cost Threshold for parallelism => 25	
	Do you agree to have these advanced SQL Server settings done by the ServicePRO Database Upgrade Program?	
	Yes No	

- 12. A prompt confirming database creation completion will appear.
- 13. Click on OK to exit the database setup. Upon completion, you will be prompted to activate ServicePRO.

	Database Setup Complete
1	The HelpSTAR database has been successfully configured!
-	For reference:
	.SQL database name = HS2000CS
	.SQL Server login user = helpstar
	Now you will be prompted to activate HelpSTAR.
	OK
	UK



### **ServicePRO Product Activation**

1. When prompted by the setup by program to activate the ServicePRO Product, Enter your user and company information. This user will be added as the first ServicePRO Administrator. Click OK to complete the activation.

Welcome to ServicePRO	
	SERVICEPRO Welcome
Please enter the following inform HelpSTAR "poweruser" - * Den Your <u>Name: *</u> Create <u>Password:</u> (default: "helpstar") Confirm Password:	
Your Co <u>m</u> pany: * Your <u>O</u> rganizational Unit: * P <u>h</u> one Number: * Email <u>A</u> ddress: * (for product activation)	QkCancel

2. Once you have added your first user, the installation will attempt to download and extract files for



3.

Microsoft .Net Framework Click on OK to proceed.

- 4. A confirmation will appear upon successful completion of the Deployment Server installation.
- 5. By default, Attachment Storage is automatically configured to be stored in the ServicePRO Database. But in case if the Database has been setup in a SQL Server 2008 R2/2012 Express version, the Finish Dialog for Deployment Server Installation will show details on informing the user to install the attachments into Windows folder.

#### Attachment Storage in ServicePRO

ServicePRO offers the ability to add documents and files to your ServicePRO objects. This functionality is automatically installed as part of the Deployment Server installation.

There are 2 storage options for Attachments in ServicePRO:



#### 1. ServicePRO Database

By default, Attachment Storage is automatically configured to be stored in the ServicePRO Database.

When attachments are stored in the SQL database, they will be included whenever you back up or move your database. However, the size of your database will increase proportionately with the use of attachments.

#### 2. Windows Folder

Attachment Storage is automatically configured for the ServicePRO database. If desired, you have the option to change the storage location. The following executable can be run to change the storage location: C:\HelpSTAR\HLPSTRCS\Install\HSDBAttachCS.exe

If you select to store Attachments in the \Attachments folder, they will not affect the size of your ServicePRO database. However, to preserve these attachments you must ensure that this folder is continually backed up.

If your backend database is stored using any version of SQL Express, the database option is not available. It is mandatory to store the attachments in Windows Folder. You must run the above executable to change your Attachment Storage option to a Windows folder.

Below are the screen shots of the steps involved with running Attachment Storage Switch utility for switching the storage between Windows Folder and Database options.

ి	HelpSTAR Attach the InstallShield V setup process. P	Vizard, which v	
Prepar	ing to Install		
			Cancel



ServicePRO Attachments Storage Configuration	×
SERVICE PRO®	
Attachment Utility 🛛	
Current Storage Location: Windows Folder  In Windows Folder  (Run from database server)  (Run from database server)  (Requires SQL server)	
	wse
Instalisheid Next>	
SERVICE <b>PRO</b> ®	
Attachment Utility	
ServicePRO Attachments Storage Configuration This application will allow you to change the storage location of attached files to ServicePRO Objects.	s.
It is strongly recommended that you exit all Windows programs before running this installation.	a
Click Next t	to Continue.
InstallShield	2 Cancel
ServicePRO Attachments Storage Configuration	ServicePRO Attachments Storage Configuration
SERVICE <b>PRO</b> ®	SERVICE <b>PRO</b> ®
Attachment Utility 🖲	Download Attachments Utility     Attachments Folder     C:\HelpSTAR\HLPSTRCS\Modules\Attachments     Gone
ServicePRID Attachments Storage location has been successfully configured.	Downloading (77 of 100) at 77.ico ServicePRD Attachment Function is being configured
Click Finish to Exit.	
InstalShidd < Back Finith Cancel	InstallShield Cencel

FIGURE 1

FIGURE 2



ServicePRO Attachments Storage Configuration	ServicePRO Attachments Storage Configuration
SERVICE <b>PRO</b> ®	SERVICE <b>PRO</b> ®
Attachment Utility	Attachment Utility 🛛
	Downloadding Attachments, Please wait
ServiceFRO Attachment Function is being configured.	ServicePRO Attachment Function is being configured.
InstallShield [Cance]	InstalShed Cancel
FIGURE 3	FIGURE 4

#### ServicePRO Components Setup

Once the Deployment Server installation has completed, the install.exe component installer will automatically launch. From the below screen, you can choose which components you will be installing upon this server. Once you have selected the components to install, click Next to proceed.

You can also choose to install any of these components at a later time by navigating to: \HelpSTAR\HLPSTRCS\Install.exe

ServicePRO - InstallShield Wizard					
ſ	ServicePRO Setup is preparing the InstallShield Wizard, which will guide you through the rest of the setup process. Please wait.				
	Cancel				



	ServicePRO Server Components					
SEI	RVICE <b>PR</b>	0°				
		Web Components  Web Components  Outlook Integration  Screen Sharing	Starwatch Service     Susiness Rules Engine     Network Audit Engine			
Deployment Server	Database Configuration	Optional Server	Components			
Select which of the optional components shown above are to be installed on this server.						

# Part 2 – Screen Sharing Service

The Screen Sharing feature enables a Support Rep to initiate a session from within ServicePRO and share screens with another user.

	STRATUS remoteASSIST - Server Component				
SE	RVICE <b>PR</b>	<b>0</b> ®			
	2 Database Configuration 2 SIST - Server Component provides the ability for a Support Re	Web Components           Web Components           Outlook Integration           remoteASSIST           3	Starwatch Service         Starwatch Service         Business Rules Engine         Network Audit Engine         PRO and share screens with		
			Click Next to Continue.		
InstallShield			Next > Cancel		



*Note:* The port # to configure Screen Sharing Service needs to be open in the server where the service is hosted. Use the default port of 5900. We recommend you use this default port of 5900 for Screen Sharing to avoid conflicts on other ports.

STRATUS remoteASSIST - Server Component					
<b>L</b> SE	RVICE <b>PR</b>	0°			
Deployment Server	Database Configuration	Web Components	Starwatch Service         Business Rules Engine         Network Audit Engine		
- Click Bro - Click Ne —Destina	IS remoteASSIST - Server Compor wse to select a different folder. xt to accept this folder. ation Folder lpSTAR\HLPSTRCS\	nent will be installed in the folder indicated b Port number for the service:	elow. 5900 Browse		
InstallShield		< <u>B</u> ack	Next > Cancel		

A confirmation will appear upon successful completion of the Screen Sharing installation

# Part 3 - Outlook Integration Service

Outlook Integration Service is a tool that synchronizes calendar meetings and appointments between ServicePRO and Microsoft Exchange.

Click Next to Continue.



ServicePRO Outlook Integration Service					
SEI	RVICE <b>PR</b>	0°			
Deployment Server	Database Configuration	Web Components           Web Components           Outlook Integration           Screen Sharing	Starwatch Service         Business Rules Engine         Network Audit Engine		
2     3 ServicePRO Outlook integration Service ServicePRO Outlook integration Service is a tool that HelpSTAR uses to synchronize meetings and appointments between ServicePRD and Microsoft Exchange.					
			Click Next to Continue.		
InstallShield		(	Next > Cancel		

Select the folder location to install Outlook Integration Service.



#### **Technical Notes on Authentication:**

The account for Outlook Integration needs to have impersonate role on the User Mailboxes in Exchange. For more information, make reference to the section in this document which follows: "Notes on Configuring Exchange Impersonation."

- In the screenshot above, if you select **Windows authentication**, the currently logged in user account must have admin rights on the Exchange server (permissions on all User Mail Boxes & User Calendars). Then the Outlook Integration Service is automatically configured by the setup to run under this account.
- If you select **Exchange Authentication**, you must enter Exchange account and password. This account should have permissions on all the User Mail Boxes & User Calendars.
- For the EWS URL, enter the Exchange Web Services URL full path, which includes: https, servername, /ews/exchange.asmx
- For the EWS Port, enter the port that the EWS URI will be using. The default is Port 80 (80 or 443 is typically the default).

#### Note on Configuring Exchange Impersonation:

We recommend before migration that you configure Exchange Impersonation.

- a. Open the Exchange Management Shell on your Exchange Server.
- b. From the command shell, enter the commands, as below, for either Exch 2007 or Exch 2010. Note: Please remember to modify the commands according to your own details.

#### Granting Impersonate role assignment on Exch 2007 Sp3

 Get-ExchangeServer | Add-ADPermission -User yourusername -extendedRights ms-ExchEPIImpersonation -InheritanceType none



- Get-MailboxDatabase | Add-ADPermission -User yourusername -extendedRights ms-Exch-EPIMayImpersonate -InheritanceType none
- yourusername -> Account used to perform the synchronization

Note: You also need to make sure that this account has permissions on all the User Mail Boxes & User Calendars.

#### Granting Impersonate role assignment on Exch 2010 Sp2

- New-ManagementRoleAssignment -Name:impersonationAssignmentName Role:ApplicationImpersonation -User:yourusername
- yourusername -> Account used to perform the synchronization

You also need to make sure that this account has permissions on all the User Mail Boxes & User Calendars.

### References:

For more information, see the following reference articles from the Microsoft library: <u>http://msdn.microsoft.com/en-us/library/bb204095.aspx</u> <u>http://msdn.microsoft.com/en-us/library/bb204095%28v=exchg.80%29.aspx</u>

# **Outlook Integration Service Visual Overview**

ServicePRO Outlook Integration Service							
SE	SERVICE PRO®						
Deployment Server	Database Configuration	Web Components     Starwatch Service       Outlook Integration     Outlook Integration       Screen Sharing     Network Audit Engine					
1	2	3					
<ul> <li>Windows Authentication</li> <li>Exchange Authentication</li> <li>This user needs impersonation permissions set on exchange server, ex. New-ManagementRoleAssignment</li> <li>Name:impersonationAssignmentName -Role;ApplicationImpersonation -User;yourusername</li> </ul>							
Email account:	YourEmail@Server.com	EWS URL: https://10.11.12.26/ews/exchange.asmx					
Email Password:		EWS Port: 80					
InstallShield		< <u>B</u> ack <u>N</u> ext > Cancel					



ServicePRO Outlook Integration Service				
<b>℃</b> SE	RVICE <b>PR</b>	0°		
Deployment Server	Database Configuration	Web Components         Image: Outlook Integration         Image: Outlook Integration         Screen Sharing         Image: Outlook Integration         Image: Outlook Integration	Starwatch Service Business Rules Engine Network Audit Engine	
InstallShield			Cancel	

A confirmation will appear upon successful completion of the Outlook integration installation.

# Part 4 - StarWatch Service

The ServicePRO StarWatch service is a background component that is required for many of the monitoring activities that affect workflow. These activities include generating alerts, automatic email updates, processing incoming/ outgoing emails, request scheduling and Active Directory import/synchronization.

#### ServicePRO StarWatch Installation Prerequisites:

Starwatch Service can be configured to run either with Local System Account or a domain User account.

- If using Local System Account, the EWS System Email Accounts should be configured to use Exchange or Agent Authentication with proper credentials of the mailbox.
- If using Domain user account, the StarWatch service will be configured to run under this user account. If using the EWS protocol, this Domain User account should be the user associated with the mail account which has access to all the Mailboxes in the Exchange server to facilitate processing emails.

1. On the server in which you want to install the StarWatch Service, navigate to the ServicePRO Deployment Server folder (\HelpSTAR\HLPSTRCS\). 2. Click on the "Install.exe" file.

- 3. Check the StarWatch Service option and click Next.
- Specify the location in which StarWatch Service files will reside. A default location will be provided (C:\HelpSTAR\HLPSTRCS). The location can be altered by clicking on the Browse button. In the location specified, the subfolder \Modules\StarWatch will be created in this folder. Click Next.



ServicePRO StarWatch Service			ServicePRO StarWatch Service				
<b>L</b> SEI	₫ SERVICE <b>PRO</b> ®			<b>IIC−</b> SE	RVICE <b>PR</b>	0°	
Deployment Server	Database Configuration	Web Components Utlook Integration Screen Sharing	Starwatch Service           Business Rules Engine           Network Audit Engine	Deployment Server	Database Configuration	Web Components	Starwatch Service
1	2	3		1	2	3	
StarWatch Service StatWatch is a toot that ServicePRD uses to monitor incoming emails and send emails from ServicePRD.			· Click Bro	PRD StarWatch Service will be insta owse to select a different folder. ext to accept this folder.	iled in the folder indicated below.		
It is recommended you install StarWatch on the Database Server.				ation Folder elpSTAR\HLPSTRCS\		Bjowse	
	Click Next to Continue.						
InstallShield			Next> Cancel	InstallShield		< <u>B</u> ack	Next> Cancel

5. Specify the Account under which the StarWatch service should be running.

ServicePRO StarWatch Service						
SERVICE PRO®						
		Web Components	Starwatch Service			
Deployment Server	Database Configuration	Outlook Integration	Business Rules Engine			
Deployment Server	Database configuration	Screen Sharing	Network Audit Engine			
1	2	3				
Use LocalSystem account to run StarWatch service.     Use Domain user account to run StarWatch service. This user needs impersonation permissions set on exchange server, ex. New-ManagementRoleAssignment -Name:impersonationAssignmentName-Role:ApplicationImpersonation -User:yourusername User accounts must be in the format DOMAIN\Username. User name: WIN-CQ0RPGHCJKD\Administrator Password:						
InstallShield		< <u>B</u> ack	Next > Cancel			

6. A confirmation will appear upon successful completion of the StarWatch Service installation.



# Part 5 – Business Rules Engine

ServicePRO's Business Rules Engine is a required service for the use of ServicePRO's Business Rules functionality.

- 1. On the server in which you want to install the Business Rules Engine, navigate to the ServicePRO Deployment Server folder (\HelpSTAR\HLPSTRCS\).
- 2. Click on the "Install.exe" file.

**ServicePRO** 

- 3. Check the Business Rules Engine option and click Next.
- 4. Specify the location in which Business Rules Engine files will reside. A default location will be provided (C:\HelpSTAR\HLPSTRCS). The location can be altered by clicking on the Browse button. In the location specified, the subfolder \Modules\RuleService will be created. Click Next.



ServicePRO Business Rule Engine							
SERVICE PRO®							
Deployment Server	Database Configuration	Web Components Web Components Outlook Integration Screen Sharing	Starwatch Service         Business Rules Engine         Network Audit Engine				
	ServicePRO Business Rule Engine Automate the workflow in your organization using ServicePRO Business Rules.						
			Click Next to Continue.				
InstallShield		< <u>B</u> ack	Next > Cancel				
	ServicePRC	) Business Rule Engine	X				
<b>L</b> SEI	RVICE <b>PR</b>	0°					
Deployment Server	Database Configuration	Web Components  Web Components  Outlook Integration  Screen Sharing	Starwatch Service Business Rules Engine				
- ServicePRO Business Rule Engine will be installed in the folder indicated below. - Click Browse to select a different folder. - Click Next to accept this folder. Destination Folder C:\HelpSTAR\HLPSTRCS\ Browse							
InstallShield		< <u>B</u> ack	Next > Cancel				



ServicePRO Business Rule Engine							
SEI	SERVICE PRO®						
Deployment Server	Database Configuration	Web Components          Web Components         Outlook Integration         Screen Sharing         3	Starwatch Service FOR Business Rules Engine Network Audit Engine				
InstallShield			[Cance]				

5. A confirmation will appear upon successful completion of the Business Rules Engine installation.

ServicePRO Business Rule Engine				
SEI	RVICE <b>PR</b>	<b>0</b> °		
Deployment Server	2 Database Configuration 2	Web Components  Web Components  Outlook Integration  Screen Sharing  Stalled.	Starwatch Service     Starwatch Service     Business Rules Engine     Network Audit Engine     Click Finish to Exit.	
InstallShield		K <u>B</u> ack	<b>Finish</b> Cancel	



# Part 6 - Network Audit Engine Installation & Configuration

Using the Network Audit Service, you can remotely collect detailed hardware and software information about the machines on the networks you manage. This information is automatically stored in the ServicePRO database.

#### Prerequisites:

• The Network Audit Engine must be run as a domain user that has administrative rights on the machines being audited. If Windows Authentication is used, this domain administrator must be authenticated to the database.

#### **Network Audit Engine Installation:**

- 1. On the server in which you want to install the Network Engine, navigate to the ServicePRO Deployment Server folder (\HelpSTAR\HLPSTRCS\).
- 2. Click on the "Install.exe" file.
- 3. Check the Network Audit Engine option and click **Next** to proceed.

ServicePRO Network Audit Engine			
<b>L</b> SEI	RVICE <b>PR</b>	0°	
		Web Components Utlook Integration Screen Sharing	Starwatch Service Business Rules Engine
Deployment Server ServicePRO Network Network Audit Engine ma	2 Database Configuration Audit Engine anages the Hardware and Software	Optional Server Cor	nponents
InstallShield		<u>K</u> Back.	Click Next to Continue.

- 4. Specify the location in which Network Audit Engine files will reside. A default location will be provided (C:\HelpSTAR\HLPSTRCS). The location can be altered by clicking on the Browse button.
- 5. In the location specified, the subfolder \Modules\AuditService will be created. Click Next.



ServicePRO Network Audit Engine			
SE	RVICE <b>PR</b>	0°	
		Web Components	Starwatch Service
		Outlook Integration	Business Rules Engine
		Screen Sharing	Network Audit Engine
1 Deployment Server	2 Database Configuration	Optional Server Co	mponents
- Click Bra - Click Ne Destina	PRO Network Audit Engine will be powse to select a different folder. ext to accept this folder. ation Folder elpSTAR\HLPSTRCS\	installed in the folder indicated below.	Browse
InstaliShield		< <u>B</u> ack	Next> Cancel

6. You will be prompted to specify the domain account that this service will be run under.

ServicePRO Network Audit Engine				
<b>L</b> SE	RVICE <b>PR</b>	0 <sup>®</sup>		
	9	Web Components	Starwatch Service	
		Outlook Integration	Business Rules Engine	
1 Deployment Server	2 Database Configuration	Optional Server Co	mponents	
Specify th User acco	Specify the user account to be used by ServicePRO Network Audit Engine. User accounts must be in the format DOMAIN\Username.			
<u>U</u> ser name	e:			
WIN-CQC	DRPGHCJKD \Administrator		Browse	
Password	:			
********				
InstallShield		< <u>B</u> ack	<u>N</u> ext > Cancel	

7. A confirmation will appear upon successful completion of the Network Audit Engine installation.



ServicePRO Network Audit Engine			
<b>L</b> SEI	RVICE <b>PR</b>	0°	
Deployment Server	2 Database Configuration	Web Components  Web Components  Outlook Integration  Screen Sharing  Optional Server Co	Starwatch Service Business Rules Engine Network Audit Engine mponents
ServicePRO Network Audit Engine is being configured.			

# **Client Audit Add-In Installation & Configuration**

#### Prerequisites:

In order for the Client Audit Add-In to perform on each of the workstations in which it is installed, the following prerequisites must be met:

- The ServicePRO Audit Service must be installed on the Deployment Server.
- The user logged into the workstation must have local administrator rights on the machine and must- be able to connect directly with the ServicePRO database.

Notes:

- The Client Audit Add-In service does not have to be installed on the machine hosting the ServicePRO Audit Engine Service.
- In order for the Client Audit Add-In to perform at scheduled intervals, a discovery schedule must be configured.
  - 1. On the machine in which the Client Audit Add-In service will be installed, navigate to the following location on the ServicePRO Deployment server: \HelpSTAR\HLPSTRCS\INSTALL\
  - 2. Launch the file hsauditclientcs.exe. Click Next when prompted.





Specify the location in which the Client Audit Add-in files will reside. A default location will be specified (C:\HelpSTAR\HLPSTRCS). The location can be altered by clicking on the Browse button. Click Next when complete.

	ServicePRO Client Audit Add-in	x
<u>ک</u>	ERVICE <b>PRO</b> ®	
Cli	ient Audit Add-In 髨	
- Clii - Clii - Clii	ervicePRO Client Audit Add-in will be installed in the folder indicated below. ick Browse to select a different folder. ick Next to accept this folder. restination Folder	
InstallShield	C:\HelpSTAR\HLPSTRCS\ Browse <u> </u>	Cancel

3.





4. A confirmation prompt will appear upon successful completion of the Client Audit Add-in Installation. The prompt will request for you to restart your computer

ServicePRO Client Audit Add-in
SERVICE <b>PRO</b> ®
Client Audit Add-In 🔜
InstallShield Wizard Complete ServicePRO Client Audit Add-in has been successfully installed.
<ul> <li>Yes, I want to restart my computer now.</li> <li>No, I will restart my computer later.</li> <li>Remove any disks from their drives, and then click Finish to complete setup.</li> <li>Click Finish to Exit.</li> </ul>
InstallShield <u>&lt; Back</u> Finish Cancel

# Part 7 - ServicePRO Web Components

ServicePRO is equipped with several web components that your users can access to submit and service requests.



# Notes Regarding Web Components Installation

• The Web Components Installer will only allow you to use a single web site for these components.

Individual portals must be installed as virtual directories to this web site.

• If you want to install each of the Web Components on their own respective websites (instead of installing in virtual directories under one single website), uncheck these components in this step (see Figure II - Web Components - with checkboxes). At a later point, you can launch the individual web components installers from the following location:

[ServicePRO installation directory]\HLPSTRCS\INSTALL

- End User Web Portal: WebPortalCS.exe
- Mobile Web Portal: HSMobileWeb.exe
- Password Reset Utility: HSpwdReset.exe
- ServicePRO Support Rep Portal: HSServicePRO.exe
- 1. On the server in which you want to install the ServicePRO Web Components, navigate to the ServicePRO Deployment Server folder (\HelpSTAR\HLPSTRCS\Install).
- 2. Click on the "HSWebIntegrate.exe" file. The Web Portal Components installation will proceed. Click Next to begin the installation.
- 3. The Web Components installer will let you decide what components will be installed. On the server, determine which IIS Web Site will be used. For each component selected, provide an IIS Virtual Directory and Destination Folder for the installation. Once you have chosen which components will be installed, click on Next to proceed.

	ServicePRO Web Components	x
SERVIC	E <b>PRO</b> ®	
Select Web Site for all web applications: Default Web Site	Use https Hosting: © Yes I © No	
ServicePR0. Support Portal Virtual Directory Name:	Destination Folder C:\HelpSTAR\HSSITES\HSSupportNET	]
Gelfiservice End User Portal Virtual Directory Name:	Destination Folder C:\HelpSTAR\HSSITES\HSNET	]
ServicePR0 Password Reset Virtual Directory Name:	Destination Folder C:\HelpSTAR\HSSITES\HelpSTAR Password Reset	]
ServicePRD Mobile Web Portal Virtual Directory Name:	Destination Folder C:\HelpSTAR\HSSITES\HSMOBILENET Browse	]
InstallShield	( <u>B</u> ack <u>N</u> ext > Cance	el

4. For all web components, specify a Domain User and Password to be used for authentication. If you have selected the Password Reset component, you will also need to Delegate the "Reset users passwords and force password change at next logon" control to this user in Active Directory. Click on Next to proceed.



# ServicePRO .Net Web Portal Installation

#### Web Portal Installation Prerequisites:

- Microsoft .Net Framework 4 is required for this installation.
- Internet Information Services 6.0 or 7.0 must be installed prior to running this installation.
- A domain user account will be required during installation. Ensure that the domain user account has a password that does not expire.

#### Web Portal Installation:

1. If you have selected to install the Web portal, the Web Portal installer will launch.

ServicePRO Self Service	End User Portal		x
SERVICE PRO®			
End User Portal 🔜			
ServicePRO Self Service End User Portal Enables End Users to access ServicePRO over the web.			
		Click Next to Continue.	
InstallShield	< <u>B</u> ack	<u>N</u> ext >	Cancel

2. On this screen, you will be prompted to select the following options:

- Login Page Language 
   Select the languages that should be made available to the users of the web portal.
  - $\circ~$  Select the default language presented to the end users on the web portal.
- Active Directory If users have been imported from Active Directory, selecting this option allows you to set a login bypass for the web interface. This allows a user to automatically login into the Web portal interface using the same login used for the machine they are currently logged in to.
- Items Visible to End Users specify the fields available to end users when logging a new request.



3. Click **Next** when finished with the above options.

	ServicePRO Self Service End User Portal
SERV	
End Use	r Portal 🔜
<ol> <li>Active Directory:</li> <li>Yes</li> <li>No</li> <li>Items Visible to End Users:</li> </ol>	b) Select default Language □ Spanish □ Slovenian   English
InstallShield	< <u>B</u> ack <u>N</u> ext> Cancel
	ServicePRO Self Service End User Portal
SERV	
End Use	
	CEPRO®



4. A confirmation will appear upon successful completion of the ServicePRO Web Portal installation.

ServicePRO Self Service End User Portal				
SERVICE <b>PRO</b> ®				
Deployment Server	Database Configuration	Web Components Web Components Outlook Integration Screen Sharing	Starwatch Service Starwatch Service Business Rules Engine Network Audit Engine	
1	2	3		
ServicePRD Self Service End User Portal has been successfully installed. Before you can use programs, you must restart your computer to complete the setup. The installation includes HTML code that can be added to a page on your website to create a ServicePRD login portal. The code is located at: C:\HelpSTAR\HSSITES\HSNET\Login.htm. Remove any disks from their drives, and then click Finish to complete the <b>Click Finish to Exit.</b>				
InstallShield		< <u>B</u> ack	<b>Finish</b> Cancel	

# Web Portal Customization

ServicePRO will allow you to customize the look and feel of your .Net Web Interface. Once the Web Portal installation is complete, options to customize the Web Portal will be launched (as shown below).



ServicePRO Self Service End User Portal	I Customization
	Web Portal Customization
Customizing the End User Web Portal Customizing your end user web portal to reflect your company is simple to config a basic theme to customize to suit your company's brand.	gure. You can upload your company's logo and then select
Company Logo First, upload your company's logo or header. Supported file formats are PNG, JPEG and GIF and maximum image size supported is 930 x 85 pixels.	C:\HelpSTAR\HSSITES\HSNET\DemoPage\hslmage Browse
Color Theme Select a basic color theme for your end user web portal.          Select a basic color theme for your end user web portal.         Select a basic color theme for your end user web portal.	Silver Default. Silver on a black background.
Support Humer.         Welcome User Name           8 OW IND 122,6427         Welcome User Name           Automatic Ansample.         Welcome User Name           -** Use semple.         Welcome User Name           Hardy Ander semple.         Welcome User Name           Hardy Ander semple.         Welcome User Name	Submarine Dark gray on a blue background. Select Theme
And the more starting production of the start starting of the starting production of the starting producting production of the st	Caim blues, on a turquoise background. Select Theme Ruby Red
Presented by Mely213A	Deep red on a black background.
Preview Current Theme	Next » Cancel

You can complete your customizations at this stage. However, should you decide to customize or modify the theme of your web portal at a later time, you can launch the customization options from the following location:

\HSNET\WebUIThemeCustomize.exe

Note: For Internet Explorer, it is recommended to upgrade version 7.0 or higher to view the best quality of your customizations.

To complete your customizations, perform the following:

1. **Company Logo** – Upload your company logo to your Web Portal. Click on the Browse button to locate your image file. Click on the Open to insert the image. Note: this image must not exceed 950 x 100 pixels.



		Installation Procedure
🧟 Se	rvicePRO Self Service End User Portal	I Customization – 🗆 🗙
L .		Web Portal Customization
Customizing the End User Customizing your end user wel a basic theme to customize to a	portal to reflect your company is simple to config	gure. You can upload your company's logo and then select
	ny's logo or header. Supported file formats are haximum image size supported is 930 x 85 pixels.	C:\HelpSTAR\HSSITES\HSNET\hslmages\blk.gif Browse
2 Color Theme	Over Height	×
Select a basic color then	The maximum image size supported is 950x	c100 pixels.
Support Hearts 8 00 am to 8 00 pm 1 000 t22, 400 Account cements Table as example.	[	OK gray on a blue background.
At uses anouncess test rad" Alles alles Harri another example. Pose tess with a posterior test radius And one example. Supress in the another example. Supress in the another example.	Br. Branchauer Brown and a strategy     Image: Constraint of the strategy       Difference     Image: Constraint of the strategy	Aqua Calm blues, on a turquoise background. Select Theme
Powered by NeighTAR		Ruby Red           Deep red on a black background.           <
	Preview Current Theme	Next » Cancel

2. Color Theme – Select a basic color theme to match your company logo. Scroll through available options and click on the Select Theme button for your desired theme.



2 Se	ervicePRO Self Service End User Portal	Customization – 🗆 🗙
<u>ل</u>		Web Portal Customization
Customizing the End User Customizing your end user we a basic theme to customize to	b portal to reflect your company is simple to config	ure. You can upload your company's logo and then select
	ny's logo or header. Supported file formats are naximum image size supported is 930 x 85 pixels.	C:\HelpSTAR\HSSITES\HSNET\hslmages\blk.gif Browse
Comple	e for your end user web portal.	Silver Default. Silver on a black background. Select Theme Dark gray on a blue background. Select Theme Aqua Caim blues, on a turquoise background. Select Theme Ruby Red Deep red on a black background.
	Preview Current Theme	Next » Cancel

- 3. **Preview Current Theme** Select the Preview Current Theme button to view how your theme will appear on the Web Portal.
  - Click on the Return to Customization Options button to return to the customization options.
  - Once you have returned back to the customization options, click on Next to continue with available options.
- 4. Advanced Color Options Further customization options for the main/background color of your web portal can be performed at this step. Select advanced colors to further match your company theme or logo.



Main/Backgrou	nd Color
The backgroun	d color of the the web portal.
Colour	Hex Colour
•	3D6D9B
Secondary/Hea	der Color
1083	aring in headers (for example
Colour	ts, and the Support Hours box.) Hex Colour
	0F416F
	014101
Tertiary Color	
The color in tal	bs.
Colour	Hex Colour
	C1D1DF
Other	
Depending on	the color of the secondary/header
color you may	need to change the font color here
White	O Black
	the color of the background you hange the image color here.
<ul> <li>White</li> </ul>	O Black

5. Service Desk Details – Click on the Support Hours button to enter the available hours of support, contact phone number and URL for the help desk.



ServicePRO Self ServicePRO Self ServicePRO Self ServicePRO Self ServicePRO Self ServicePRO Self ServicePRO	rvice End User Portal Customization 📃 🗖 🗙			
Customizing the End User Web Portal	Web Portal Customization			
Once you have chosen a basic color theme for your web portal, you can further customize the theme to suit your company's branding. Colors for the background, header and highlight can be selected in the options below. Once you have completed altering the basic color theme, a custom CSS file can be added to add further customization.				
Main/Background Color The background color of the the web portal. Colour Hex Colour	Enter Service Desk Details Provide your service desk's hours of operation, contact number and URL for your web portal.			
Image: Color secondary/Header Color         Secondary/Header Color         The color appearing in headers (for example Announcements, and the Support Hours box.)         Colour       Hex Colour         Image:	HTM         X           Any m         Support Hours:         8:00 am to 8:00 pm           imme         Tel:         1-800-563-4357			
	Web Page:         Logox           User to         Logox           Stage to a log print to do and the stage print to do and the stage			
Tertiary Color The color in tabs. Colour Hex Colour CCCCCC	Announcements This have example If a new second state of the se			
Other Depending on the color of the secondary/header color you may need to change the font color here	And use invoir example. And use invoir example. So press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spring within the rate is the press dort of a spr			
White     Black     Depending on the color of the background you     may need to change the image color here.	Open Requests           Bed         2 the         2 model leaded         2 modeleaded         2 modeleaded         2 modeleadede			
White     Black	« Back Cancel Finish			

6. **HTML Viewer** – Modifications made to your Web Portal will be reflected immediately. This viewer will allow you to preview the options selected for your customization. Click on Enlarge View to preview your Web Portal on a larger window. Click on Finish to exit the designer.

# ServicePRO Password Reset Installation

- 1. If selected, the Password Reset Installation will proceed. Click on Next to proceed.
- 2. When prompted, review and agree to the ServicePRO license agreement. Click Next.





- 3. You will be prompted to choose a Shared Folder for the Password Reset module.
- 4. When you click Browse, a window will appear which will allow you to select a folder or enter a network path. Click OK and then Next to proceed.


	ServicePRO Password	Reset		×
<u>د</u>	SERVICE <b>PRO</b> ®			
P	assword Reset 🐋			
	Please select a Network shared folder location for deploying sha	red files for passwor	d reset.	
	Click Browse to select a different folder.			
	Click Next to accept this folder.			
	HelpSTAR Folder \\MachineName\SharedFolder		Browse	
InstallShield		< <u>B</u> ack	Next >	Cancel

5. The necessary database tables will be created for the Password Reset component. A dialog box will appear when it has been completed.



	ServicePRO Password Reset	x
<b>ک</b> SI	ERVICE <b>PRO</b> ®	
Ра	ssword Reset 🛁	
	Password Reset DB Update Utility	
	The Database tables associated with Password Reset Utility have been successfully created in the Database: HS2000CS	
	ОК	
	ServicePRO Password Reset is being configured.	
InstallShield		Cancel





6. A confirmation will appear upon successful completion of the ServicePRO Password Reset installation. The confirmation will also provide web path for the Administration of this component. Click on Finish to proceed to the next component.





# ServicePRO Mobile Web Portal Installation

1. If selected, the Mobile Web Portal Installation will proceed, click on Next to proceed.





2. A confirmation will appear upon successful completion of the Mobile Web Portal Installation. Click on Finish to proceed to the next component.



ServicePRO Mobile	e Web Portal
SERVICE <b>PRO</b> ®	
Mobile Web Portal	
ServicePRO Mobile Web Portal has been successfully installed. Before ye to complete the setup. Users can login to the Mobile Portal using the following URL: http://WIN-CQ0RPGHCJKD:808/Mobile	ou can use programs, you must restart your computer Click Finish to Exit.
InstallShield	< Back Finish Cancel

# Part 8 - ServicePRO Support Portal Installation

ServicePRO is now a web browser application. This installation provides you with the browser application.

- 1. ServicePRO Support Portal Installation proceeds.
- 2. ServicePRO Support Portal enables Support Reps to access ServicePRO over the Web. Click **Next** to proceed.



ServicePRO Suppor	rt Portal		x
SERVICE <b>PRO</b> ®			
Support Portal 🔜 🕄			
ServicePRO Support Portal			
Enables Support Reps to access ServicePRO over the Web.			
		Click Next to Cor	ntinue.
InstallShield	< <u>B</u> ack	<u>N</u> ext>	Cancel





Note: Hotfixes for .Net 4.0 may be installed during the setup



	Software Update KB2656368v2 Installation Wizard	×	×
	Installation Progress Please wait while the software update KB2656368v2 is being installed.	Microsoft .NET	
	File verification: All files verified successfully		e" button. in a ppear in
	Installation progress: Installing NDP40-KB2656368	¢	
InstallShield		Cancel	Cancel

3. Upon the completion of the component installations, a final confirmation will be shown.





# Part 9 - ServicePRO Server Components Installation Completion

Once all components are installed on the ServicePRO server, you receive a prompt confirming completion.



	ServicePF	RO Server Components
<b>L</b> SEI	rvice <b>pr</b>	0°
		Web Components       Starwatch Service         Outlook Integration       Starwatch Service         Screen Sharing       Starwatch Service         Network Audit Engine
Deployment Server	2 Database Configuration	Optional Server Components
Congratulations! Setup has finished insta - Screen Sharing Server - Outlook Integration Se - StarWatch Service - Business Rule Engine - Network Audit Engine - Web Components	lling the following options. r Component	It is recommended you reboot your server now.   Yes, I want to restart my computer now  No, I will restart my computer later.  Click Finish to Exit.
InstallShield		< <u>B</u> ack Finish Cancel

# **Part 10 - Importing Users from Active Directory**

If your organization has implemented Active Directory Services, ServicePRO can be configured to import groups of users and related fields from Active Directory.

## **Active Directory Tips**

- Prior to starting the Active Directory import, determine how users should be imported from Active Directory. For example, determine if users should be split into teams or OUs based on their Organizational Units or if they should be imported to a main OU for now.
- A unique identifier is the field that ServicePRO will look for when importing distinct users. Select a unique identifier that will have unique values in Active Directory. For example, "name" or "email" would be good fields in which to import users as these fields are rarely duplicated.

## **Import Settings:**

1. Under the File menu in ServicePRO, click on the Setup/Administration option. On the Configure Tab,- select the Active Directory Synchronization option. The following screen will appear:



	Confid	ure Active Directory Sync	bronization		x
	soring	and many april			0.
Import Settings	Field Mapping	Schedule/Import Nov	¢		
Domain Type Trusted Domains (LDAP) • Forest (Global Catalog)		Authentication for Chor HelpSTAR and AD HelpSTAR only	eograf	Authentication for End User Portal <ul> <li>HelpSTAR and AD</li> <li>HelpSTAR only</li> </ul>	
		O AD only O AD		AD c	only
Import Users from	n following Active I	Directory Groups/Units			
Name		Туре	Select O	U	Select Teams
All Users in Yo	our Current Domai				
Edit	Remove				Advanced
Default OU					
Default HelpST	AR OU when ADS	department is empty :		Adm	inistration 👻

2. Select the Domain Type: Trusted Domain (LDAP) or Forest (Global Catalog).



 Select how you would like users to login to ServicePRO. Note that if Active Directory authentication is selected, ServicePRO will automatically log the user in as the user they have logged into the workstation as.





- 4. To import from specific Organizational Units or Groups in Active Directory and import users to Teams based on their Organizational Unit, perform the following:
  - Click on the Edit button in the "Import Users from the following Active Directory Groups/Unit" section.
  - Your Active Directory Tree Structure will appear. Select the desired Organizational Units, Groups or Containers and then click OK.

Active Directory Organizational Units/Containers/Groups to Import
A 🗌 🎯 QANET12DC.QANET12.COM
A GANET12
Domain Controllers
Microsoft Exchange Security Groups
QA12Team
MailSentryAccounts
🚰 Tech Team
SentryAccountsDONOTIMPORT
S'S'S'S
Jatinder's OU
Computers
ForeignSecurityPrincipals
Managed Service Accounts
Program Data
System
Users
Ok Cancel

 a. Once a specific Organizational Unit has been selected, you can select a specific Team to import users to. Double click on the blank Select Team field next to the Organizational Unit added. Options available are: Create a New Team (based on the Organizational Unit name)



b. Select a previously added Team in ServicePRO

Name	Туре	Select OU	Select Teams	
Tech Team [OU=Teo	:h Team,DC Unit		•	
		[CREATE NEW OL	Tech Team [OU=Tech Team	DC=QAN
		Orga	nizational Hierarchy By Name	
		Serve	er Room	0.5
		and the state of t	Projects	
		😹 Staff	SRS Queues	
		Jech	Support	

## **Field Mapping**

If you want to import additional AD fields into ServicePRO, perform the following:

1. Click on the Field Mapping tab. The following screen will appear:



-	Configu		ure Active Directory Synchro	nization
mp	ort Settings	Field Mapping	Schedule/Import Now	
ap	ADS Fields to	o HelpSTAR User F	ields (including Custom Fie	elds)
	HelpSTAR I	Field	ADS Field	Use As Unique Identifier?
•	EmailAddres	55	Mail	
	Organizational Unit		Department	
	Name		Name	

2. Click on Add button in the "Map ADS fields to ServicePRO User Fields" section. The following prompt will appear:

ld Mapping	E		
HelpSTAR:	Location		*
ADS:	PhysicalDeliv	eryOfficeName	*
Key:			
	Ok	Cancel	

3. Select the field to be filled in from the ServicePRO drop-down box.



- 4. Select the field to be imported from Active Directory in the ADS drop-down box.
- 5. Click OK when complete.
- 6. Add additional fields if necessary.
- 7. In the "Default Organizational Unit" section, select an OU that users will be associated with if their department field in Active Directory is not populated.

### Default OU

Default HelpSTAR OU when ADS department is empty :

Tech Support



### Schedule/Import Now

To import users immediately or to configure a scheduled interval to import users, select the Scheduled/Import Now tab. The following screen will appear:

1. To import users immediately, click on the Import Now button as shown below:

port Settings	Field Mapping	Schedule/Import Now
Import Now		
Click on the bu	tton below to impo	ort users from Active Directory.
I	mport Now	
Import Schedu	le	
Status:	• Enabled	Disabled Next run time: 11/12/2013 12:00 AM
Import:	• Daily	O Weekly
	Occurs once a	
, requerey.		
	Occurs Every	1 Hour(s)
	Starting	At: 12:00 AM () Ending At: 11:59 PM ()
Log Files	Location: c-vu	lelpSTAR\HLPSTRCS\DATA\HsADlog.txt
In addition t	o errors, log:	
		Jpdated Users
Cle	ear log every: 1	day(s)
ort Now		

2. At this point, your users will be imported into ServicePRO. Prompts will appear to update you the status of the import. Once users have been imported, you will receive a confirmation prompt.



3. To schedule a regular interval in which users should be imported, configure a desired schedule in the Import Schedule section as shown below:

nport Schedu	le						
Status:	۰	Enabled	Disable	d	Next run time:	11/12/2013 12:00 AM	
Import:	•	Daily	Weekly				
Frequency:	•	Occurs once at	12:00 AM	٢			
		Occurs Every	1 🕻	Hour(s)			
		Starting At:	12-00 AM		Ending At	11:59 PM	

# Part 11 - Importing Users and Assets with Import Utility

For performing an import of Users & Assets, a separate Import Utility is available. You can start the Utility Setup by using the installer, which is available from the following pathway:

#### \HelpSTAR\HLPSTRCS\HSImportUtil.exe

Using the ServicePRO's Import Utility, you can Import Users and Assets from an ASCII text file into ServicePRO Database.

**NOTE**: If .NET 4.0 framework is not installed on the system, the setup downloads and installs .NET 4.0 framework.

1. Select the folder to install the Import Utility.

	ServicePRO Import Utility Installation		×
	SERVICE <b>PRO</b> ®		
1	mport Utility 🞝		
	HelpSTAR Import Utility will be installed in the folder indicated below.     Click Browse to select a different folder.     Click Next to accept this folder.     Destination Folder     C:\Program Files (x86)\	Biowse	]
InstallShield	< Back	Next >	Cancel

A confirmation appears upon successful completion of the Import Utility installation.



2. Click on **Finish** to complete the setup.

# Part 12 - System Email Configuration

System Email allows ServicePRO to process incoming email requests, send reply messages, notify requesters of updates to their open requests and send outgoing request details. You can add multiple email accounts so that users can submit requests to different addresses. For example, all email received by your helpdesk, <u>itsupport@yourorganization.com</u>, will be processed by ServicePRO.

## System Email Prerequisites:

Ensure that there are no emails in the inbox of the mail account being used for System Email. As soon as System Email is started, all emails in the inbox will be processed.

## **Exchange Server (EWS)**

This protocol uses the EWS (Exchange Web Services) Managed API to connect to the specific email account and process the emails.

## Lotus Notes (IMAP)

- Lotus Notes should be configured to allow either an IMAP or POP3 connection from the server where the ServicePRO StarWatch service is installed.
- IMAP or POP3 must be enabled on the mail server.
- Lotus Notes must be configured to allow SMTP connections for sending outgoing mail from ServicePRO.
- System Email settings for Lotus Notes should be configured using the same user account that is -given the "run as" privileges for the ServicePRO StarWatch service.

## System Email for Exchange Server (EWS)

1. Open the server's Services console (Start > Run > Type in Services.msc > Press Enter).

- 2. Stop the ServicePRO StarWatch Service.
- 3. Under the File menu in ServicePRO, click on the Setup/Administration option. On the Configure Tab, -select System Email Accounts. The following window will appear:



			System	Email Accounts		
Home						
New I	Update De	lete Save Close				
N	Manage	Actions		1		
System	Account M	Ionitoring Status		Settings		
Enabled Disabled Current Status : Running Next Run Time : 11/11/2013 3:12 PM				Scan for new mail every : 1 ‡ minutes           Issue Alert if unable to process mail           Create announcement if invalid email terminates processing		
Profiles			40			
Active	Default	Profile Name	Туре	Server(s)	Email Address	
	۲	swservice	EWS	https://10.11.12.26/ews/exchange	swservice@qanet3.com	
		swsvr1 POP3	POP3/SMTP	SMTP: 10.11.12.26 POP: 10.11.12.26	swsvr1@qanet3.com	
		swews1	EWS	https://10.11.12.190/ews/exchang	swews1@qanet12.com	

4. Click on the Add button to add a mail account used for System Email. The following window will appear:



count Setting Repl	Messages Outgoing Request Up	pdates Attachm	ents Block List	
Account Information		Se	erver Information	
Profile Nam	e : DEVDOM2 - EWS		EWS Settings	
Email Addres	s : SystemAccount@devdom2.com		EWS URI :	https://10.11.12.64/ews/exchange.asmx
Mailbox Name : SystemAccount			Authentication Type :	Exchange Authentication
Account Password :			Agent Mailbox Name :	
		±12	Agent Mailbox Email :	
Domai	n : devdom2.com		Agent Password :	
Dispatch Folder	Dispatch			
Properties		1		ail' option disabled in User Properties
	Find Sender using :	Email then Displ	ay Name 🔹	
Send a c	opy of all 'Request Failed' messages to :			
		Create text log	for incoming email	Create text log for outgoing email
Test Settings				
After filling out the info	rmation on this screen, we recommend	that you test your a	ccount by clicking on the b	utton below. (Requires network connection)
		Test Account S	attions	

- 5. Select the Exchange Server (EWS) option in the Mail Server Type section.
- 6. In the Account Information section, enter the settings for the mail account.
- 7. Using the Dispatch Folder button, select a default location for requests submitted to this email address.
- 8. In the Server Information section, enter in the details for the EWS Settings EWS URI is the URL to access your Exchange Web Services.
  - If your Starwatch Service is configured to run with Local System Account, you have to use either Exchange Authentication or Agent Authentication. If you have selected Exchange Authentication, you have to Account Credentials correctly in the Account Information section. If you have selected Agent Authentication, you have to enter the Agent Accounts information (the account which has full access to the mailbox being configured) in the EWS settings section.

**NOTE**: When using these options, it is mandatory to disable password reset policy (Password should never expire)

• If Starwatch Service & the ServicePRO Portal's WCF Service are configured to run with the Domain User Account which has full access to the current mail box which is being configured, then you can use the Windows Authentication.



9. In the Properties section, the following options are available:

- 10. Option to process emails from users that have email disabled in their user properties.
- 11. Find user options link an email to a service request via email address, then display name or vice versa.
- 12. If you want a copy of failed messages be sent to you or another user; enter an email address for notifications.
- 13. Create text log files for incoming and outgoing emails.
- 14. To ensure settings are correct, click on Test Account Settings. If successfully connected, a prompt will appear saying "Successfully Connected to Mail Account".

Alert		×
ļ	Successfully connected	to the Email Account.
		ОК

- <sup>15.</sup> When settings have been entered and verified, click on Save to save settings and exit this window. You will return to the original window.
- <sup>16.</sup> In the "System Account Monitoring Status" section, check Enable to start System Email.

System Account Monitor	ing Status	
Enabled	O Disabled	
Current Status : Runnin	ng	
Next Run Time : 11/11	/2013 3:12 PM	

17. In the "Scanning Interval & Alert" section, specify the time interval in which System Email should scan for incoming emails.

Settings		
Scan for new mail every :	1 ‡	minutes
Issue Alert if unable to proces	s mail	
Create announcement if inval	id email	terminates processing

- 18. Click on Finish to save settings.
- <sup>19.</sup> Return to your Services console and start the ServicePRO StarWatch Service.

### System Email for SMTP/POP3

1. Open the server's Services console (Start > Run > Type in Services.msc > Press Enter).



- 2. Stop the ServicePRO StarWatch Service.
- 3. Under the File menu in ServicePRO, click on the Setup/Administration option. On the Configure Tab,- select System Email Accounts. The following window will appear:

			System	Email Accounts	
Home			again.	NUCLEUR CONTRACTOR	
nome	L				
		🏾 🔲 🐼			
New	Update De	lete Save Close			
1	vlanage	Actions			
System	Account N	Ionitoring Status		Settings	
	Enabled	d O Disabled		Scan for new mail every : 1	minutes
urrent	Status :	Running		Issue Alert if unable to process mail	
lext Ru	In Time :	11/11/2013 3:12 PM		Create announcement if invalid emai	l terminates processing
					r terminutes processing
Profiles		La concerna	Ŭ.,		
Active	Default	Profile Name	Туре	Server(s)	Email Address
		swservice	EWS	https://10.11.12.26/ews/exchange	swservice@qanet3.com
	0	swsvr1 POP3	POP3/SMTP	SMTP: 10.11.12.26 POP: 10.11.12.26	swsvr1@qanet3.com

4. Click on the Add button to add a mail account used for System Email. The following window will appear:



Account Information		Server	nformation	
Display Name :	swsvr1 POP3	POP	3 Settings SMTP	Settings
Email Address :	swsvr1@qanet3.com		POP3 Server :	10.11.12.26
Mail Account Name :	swsvr1		POP3 Port :	110
Account Password :	•••••			Require logon using Secure Password A
	Logon Using Email Address			POP3 Server requires authentication Enable SSL over POP3
Domain :	qanet3.com			
Dispach Folder	System Dispatch			
Properties	Find Sender using :			nail' option disabled in User Properties
Send a cop	of all 'Request Failed' messages to :			
		Create text log for i	ncoming email	Create text log for outgoing email
Test Settings				
reacoccanigo		that you test your accoun	t by clicking on the b	outton below. (Requires network connection)
	ation on this screen, we recommend t			

- 5. Select the POP3/SMTP option in the Mail Server Type section.
- 6. In the Account Information section, enter the settings for the mail account.
- 7. Using the Dispatch Folder button, select a default location for requests submitted to this email address.
- 8. In the Server Information section, enter in the details for the mail server. If your mail server employs SSL authentication, check the Enable SSL option when entering the POP3 and SMTP servers.
- 9. In the Properties section, the following options are available:
- 10. Option to process emails from users that have email disabled in their user properties.
- 11. Find user options link an email to a service request via email address, then display name or vice versa.
- 12. If you want a copy of failed messages be sent to you or another user; enter an email address for notifications.
- 13. Create text log files for incoming and outgoing emails.
- 14. To ensure settings are correct, click on Test Account Settings. If successfully connected, a prompt will appear saying "Successfully Connected to Mail Account".



Alert		×
ļ	Successfully connecte	ed to the Email Account.
		ОК

- 15. When settings have been entered and verified, click on **Save** to save settings and exit this window. You will return to the original window.
- 16. In the "System Account Monitoring Status" section, check Enable to start System Email.

System Account Monitor	ring Status	
Enabled	O Disabled	
Current Status : Runni	ng	
Next Run Time : 11/11	L/2013 3:12 PM	

17. In the "Scanning Interval & Alert" section, specify the time interval in which System Email should scan for incoming emails.

Settings		
Scan for new mail every :	1 ‡	minutes
Issue Alert if unable to proces	s mail	
Create announcement if inval	id email	terminates processing

- 18. Click on Finish to save settings.
- 19. Return to your Services console and start the ServicePRO StarWatch Service.

### System Email using IMAP/SMTP

- 1. Open the server's Services console (Start > Run > Type in Services.msc > Press Enter).
- 2. Stop the ServicePRO StarWatch Service.
- 3. Under the File menu in ServicePRO, click on the Setup/Administration option. On the Configure Tab,- select System Email Accounts. The following window will appear:



Configure	e System E	mail Accounts				
Home			System	Email Accounts		
	Update De Manage	ete Save Close				
		Monitoring Status		Settings		
	• Enabled t Status : un Time :			Scan for new mail every : 1 ‡ minutes Issue Alert if unable to process mail Create announcement if invalid email terminates processing		
Profiles						
Active	Default	Profile Name	Туре	Server(s)	Email Address	
	۲	swservice	EWS	https://10.11.12.26/ews/exchang	swservice@qanet3.com	
		swsvr1 POP3	POP3/SMTP	SMTP: 10.11.12.26 POP: 10.11.12.26	swsvr1@qanet3.com	
		swews1	EWS	https://10.11.12.190/ews/exchan	c_swews1@qanet12.com	

4. Click on the New button to add a mail account used for System Email. The following window will appear:



Account Information			and a second	
			Server Information	
Display Name : swserviceSMTP			IMAP Settings SMTP Settings	
Email Address : swservice@qanet3.com			IMAP Server :	10.11.12.26
Mail Account Name			IMAP Port	: 143 Require logon using Secure Password A IMAP Server requires authentication Enable SSL over IMAP
Account Password				
Domain				
Dispach Folder	Tech Dispatch			
roperties	Find Sender using :			ail' option disabled in User Properties
Properties Send a co	Find Sender using :	Email then Disp		ail' option disabled in User Properties
	Find Sender using : by of all 'Request Failed' messages to :	Email then Disp	olay Name 👻	
		Email then Disp	olay Name 👻	ail' option disabled in User Properties
		Email then Disp	olay Name 👻	
Send a co fest Settings	oy of all 'Request Failed' messages to :	Email then Disp	olay Name 👻	

- 5. Select the IMAP/SMTP option in the Mail Server Type section.
- 6. In the Account Information section, enter the settings for the mail account.
- 7. In the Server Information section, enter in the details for the mail server. If your mail server employs SSL authentication, check the Enable SSL option when entering the IMAP and SMTP servers.
- 8. In the Properties section, the following options are available:
- 9. Option to process emails from users that have email disabled in their user properties.
- 10. Find user options link an email to a service request via email address, then display name or vice versa.
- 11. If you want a copy of failed messages be sent to you or another user; enter an email address for notifications.
- 12. Create text log files for incoming and outgoing emails.
- 13. To ensure settings are correct, click on Test Account Settings. If successfully connected, a prompt will appear saying "Successfully Connected to Mail Account".





- 14. When settings have been entered and verified, click on Save to save settings and exit this window. You will return to the original window.
- <sup>15.</sup> In the "System Account Monitoring Status" section, check Enable to start System Email.

System Account Monitoring Status				
Enabled	O Disabled			
Current Status : Runnin	ng			
Next Run Time: 11/11	/2013 3:12 PM			

16.

In the "Scanning Interval & Alert" section, specify the time interval in which System Email should scan for incoming emails.

Settings	
Scan for new mail every :	1 🗘 minutes
Issue Alert if unable to proces	is mail
Create announcement if inval	id email terminates processing

- 17. Click on Finish to save settings.
- 18. Return to your Services console and start the ServicePRO StarWatch Service

# **Additional Resources**

### **Technical Specifications:**

http://portal.helpstar.com/outgoing/ServicePRO-Resources/Tech Specs - ServicePRO.pdf