



# *Installation Procedures*

## Updated May 1<sup>st</sup>, 2014 Contents

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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 [hupgrade14@helpstar.com](mailto:hupgrade14@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) ○
  - 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.

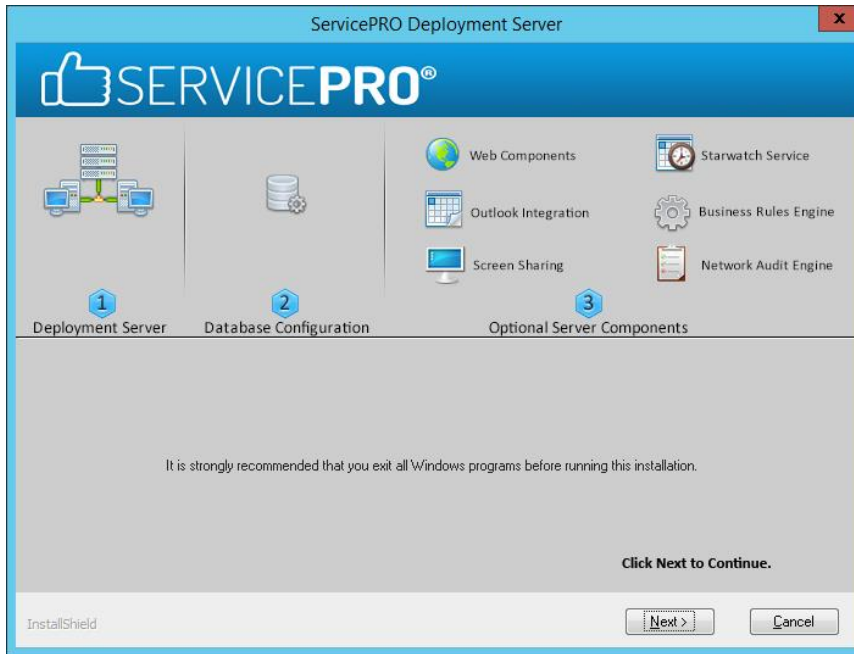
### Deployment Server Installation:

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

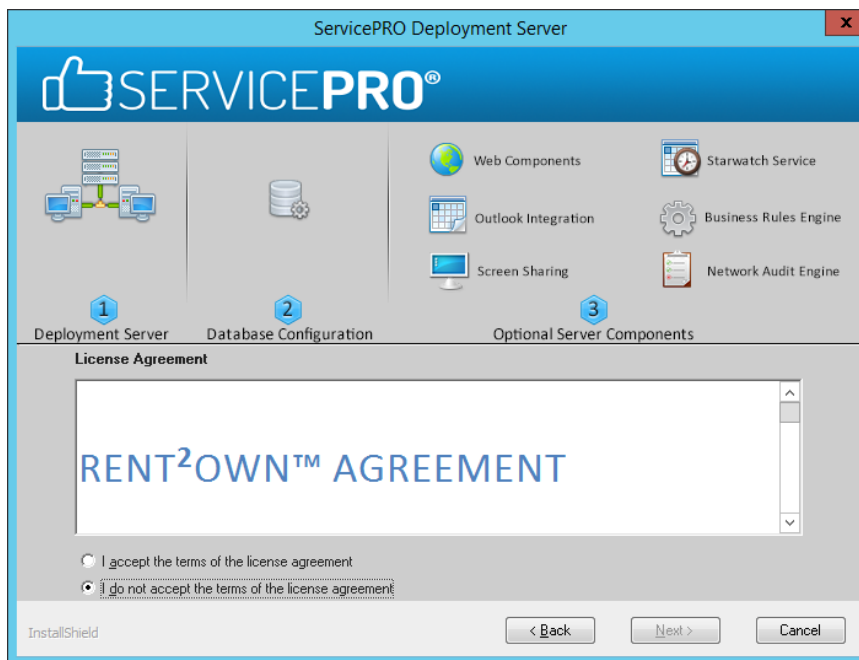
**Note:** To proceed with the installation- It is strongly recommended that you exit all windows programs before running this installation.



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

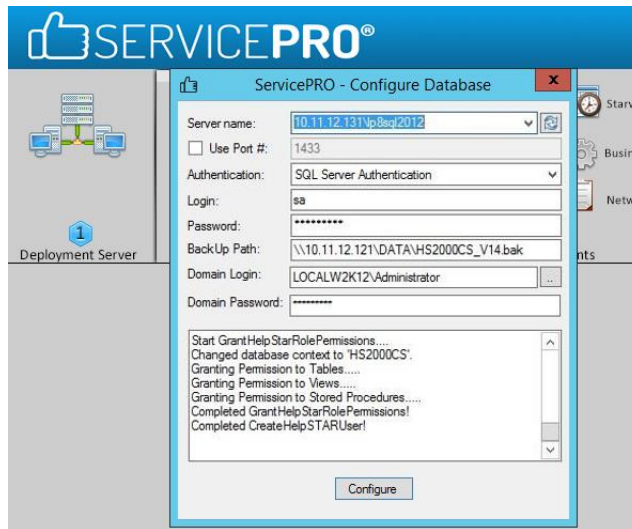


4. Specify the location in which the ServicePRO Deployment Server files will reside. A default location is provided (C:\HelpSTAR\). This can be altered by clicking on the Browse button. Click Next.



## 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).



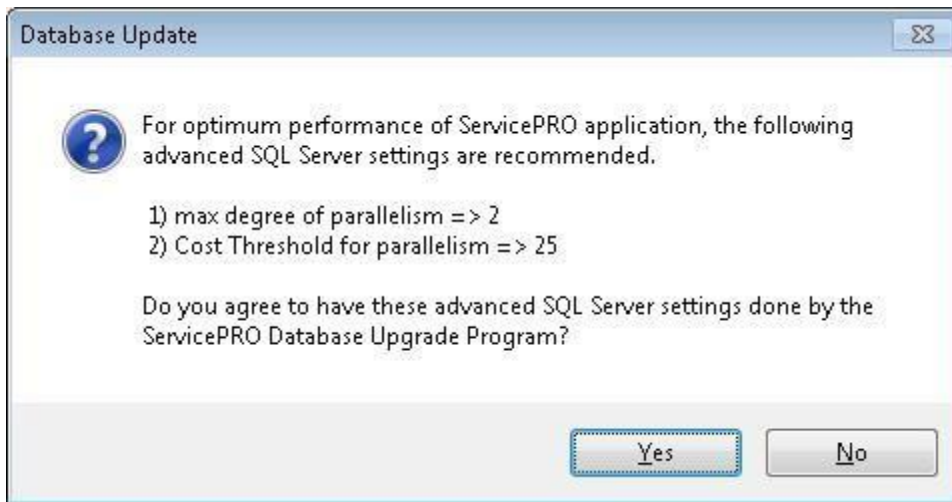
The following fields must be entered to configure your ServicePRO Database:

- 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.

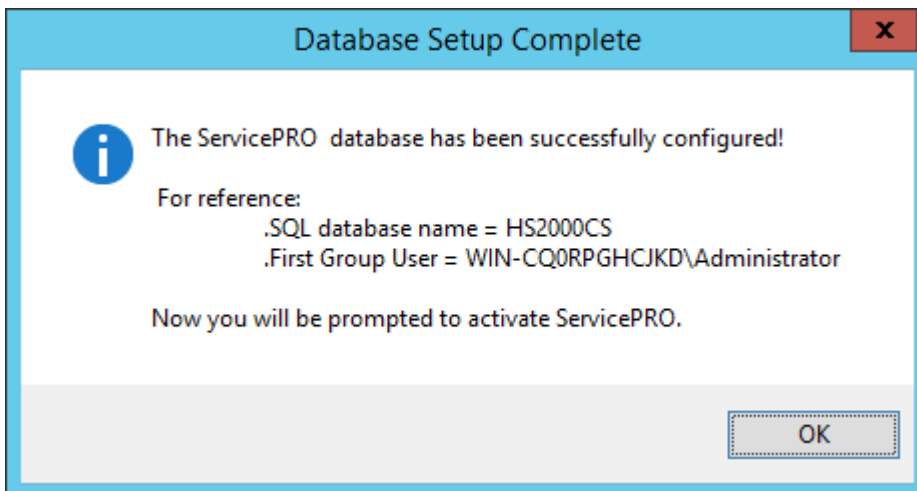
4. The User will be shown the prompt below to get confirmation on Parallelism Settings; the user should check with their DBA to confirm if they are giving permission to do this setting or not. Max degree of parallelism refers to maximum CPU threads for a single query, and cost threshold for parallelism 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.



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.

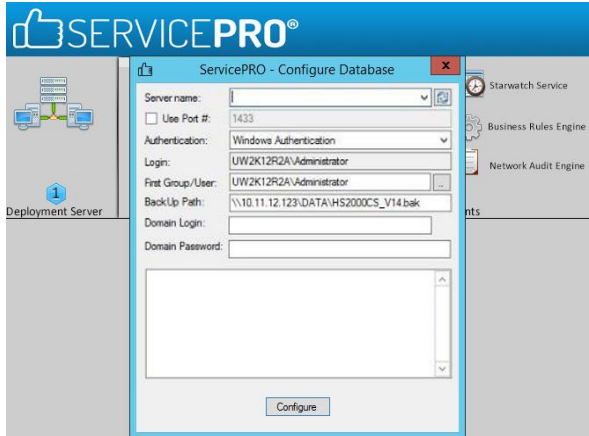
### Database Setup for Windows Authentication

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

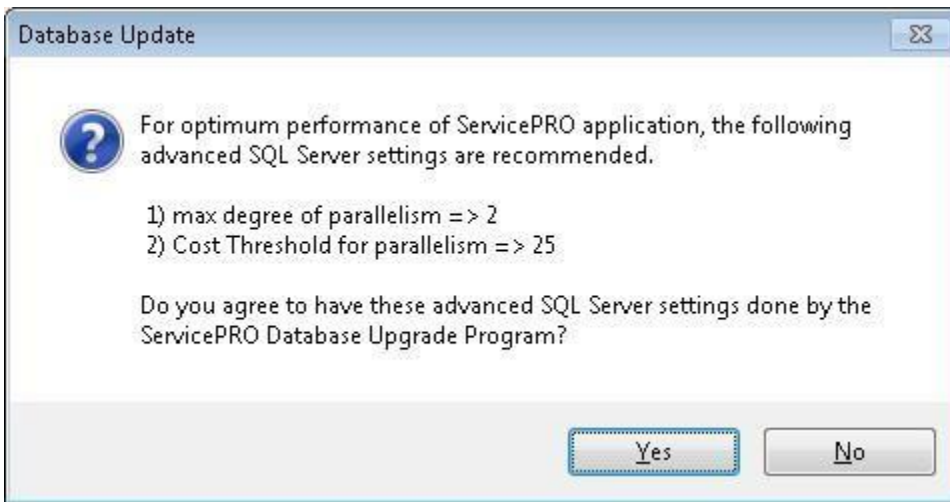


2. The following fields must be entered to configure your ServicePRO Database:
3. Server Name: Enter the name or IP address of your SQL server.
4. Use Port #: Port 1433 will be used by default. To select a different port, check this box and it will allow you to enter a Port # of your choice.
5. Authentication: 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.

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.



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.

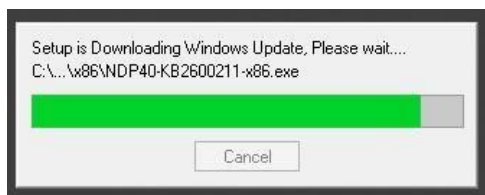


## ServicePRO Product Activation

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.



2. Once you have added your first user, the installation will attempt to download and extract files for Microsoft .Net Framework. Click on OK to proceed.
- 3.



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

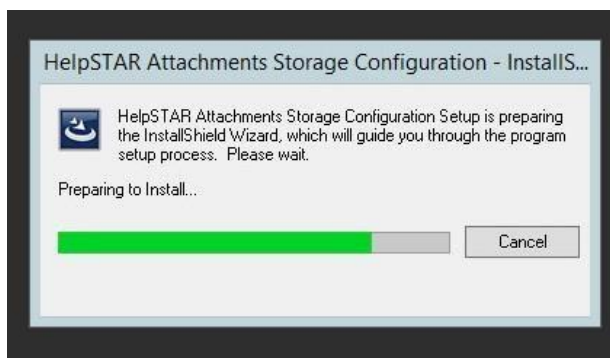
Attachment Storage is automatically configured for the ServicePRO database. If desired, you have the option to change the storage location. The following executable can be run to change the storage location:

```
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.



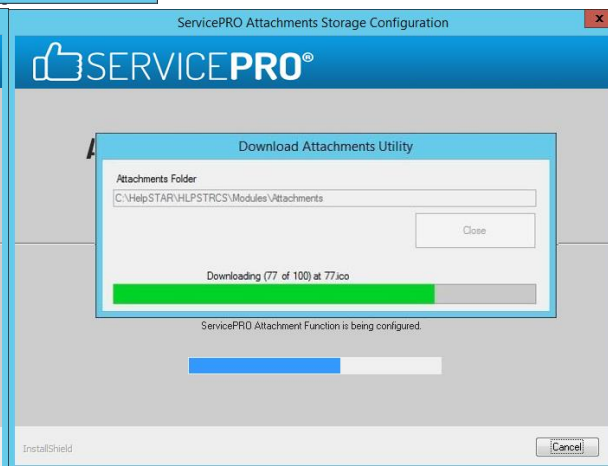
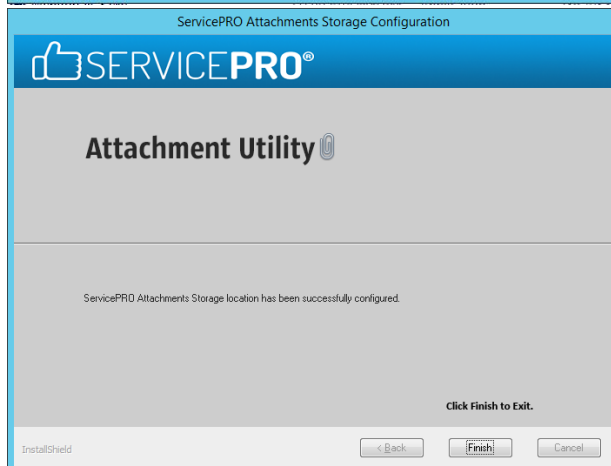
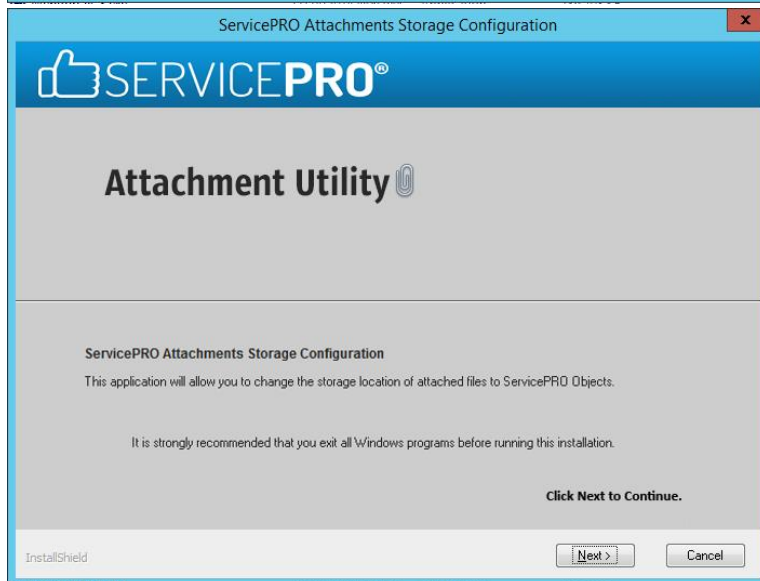
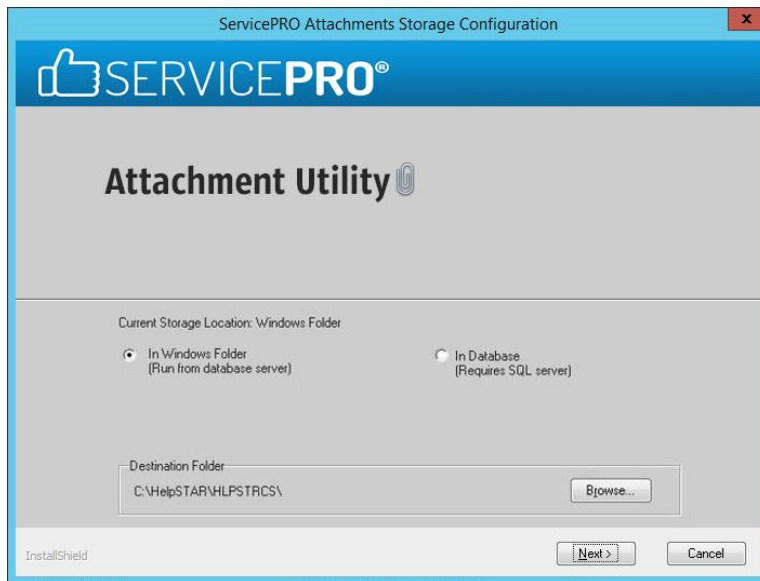


FIGURE 1

FIGURE 2

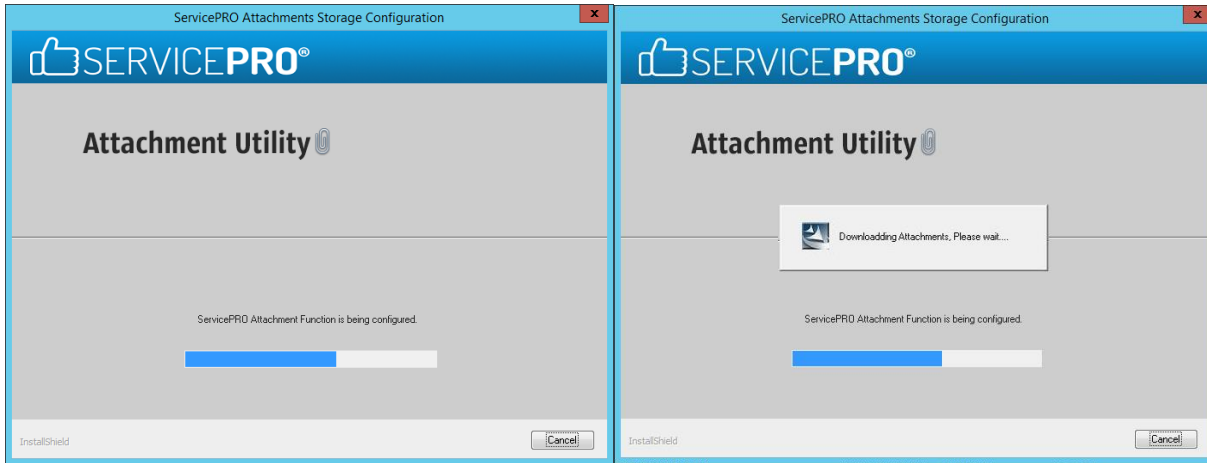


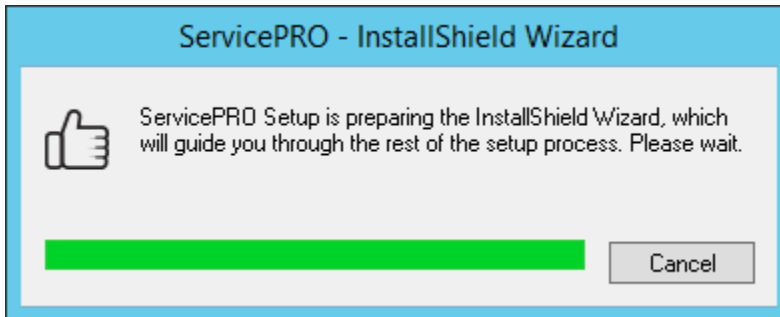
FIGURE 3

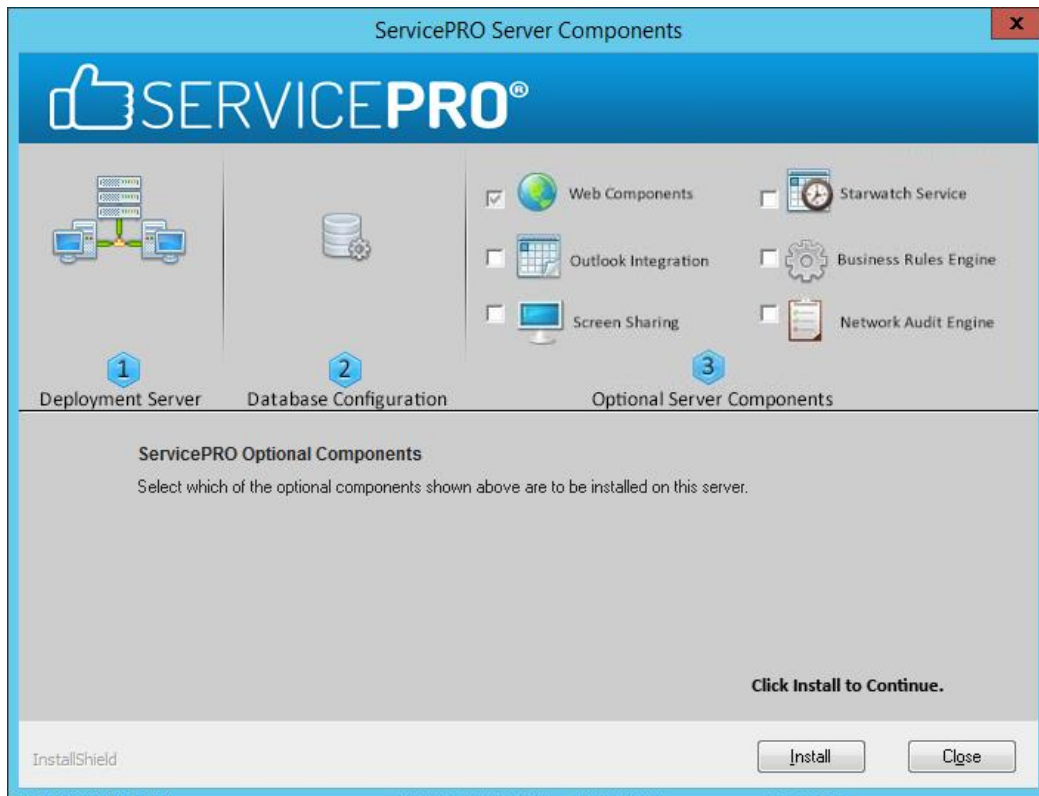
FIGURE 4

### 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.

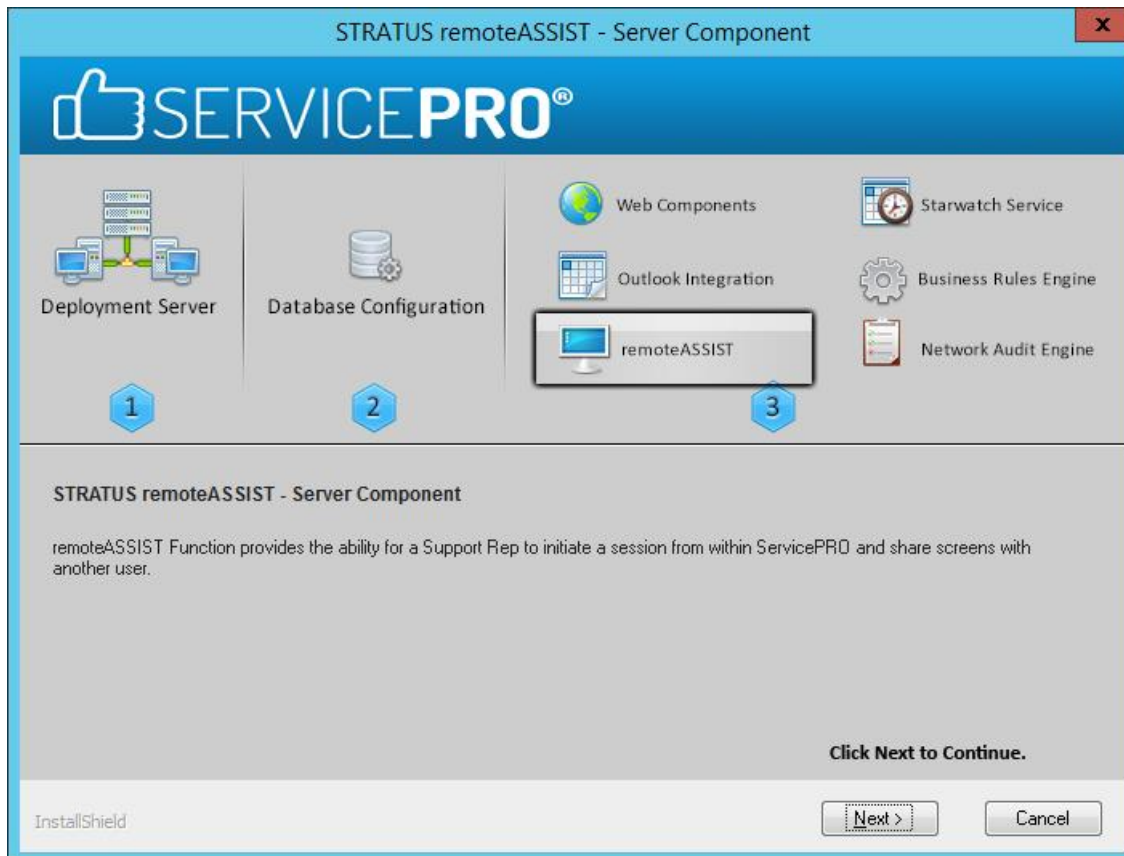
You can also choose to install any of these components at a later time by navigating to:  
\\HelpSTAR\HLPSTRCS\Install.exe





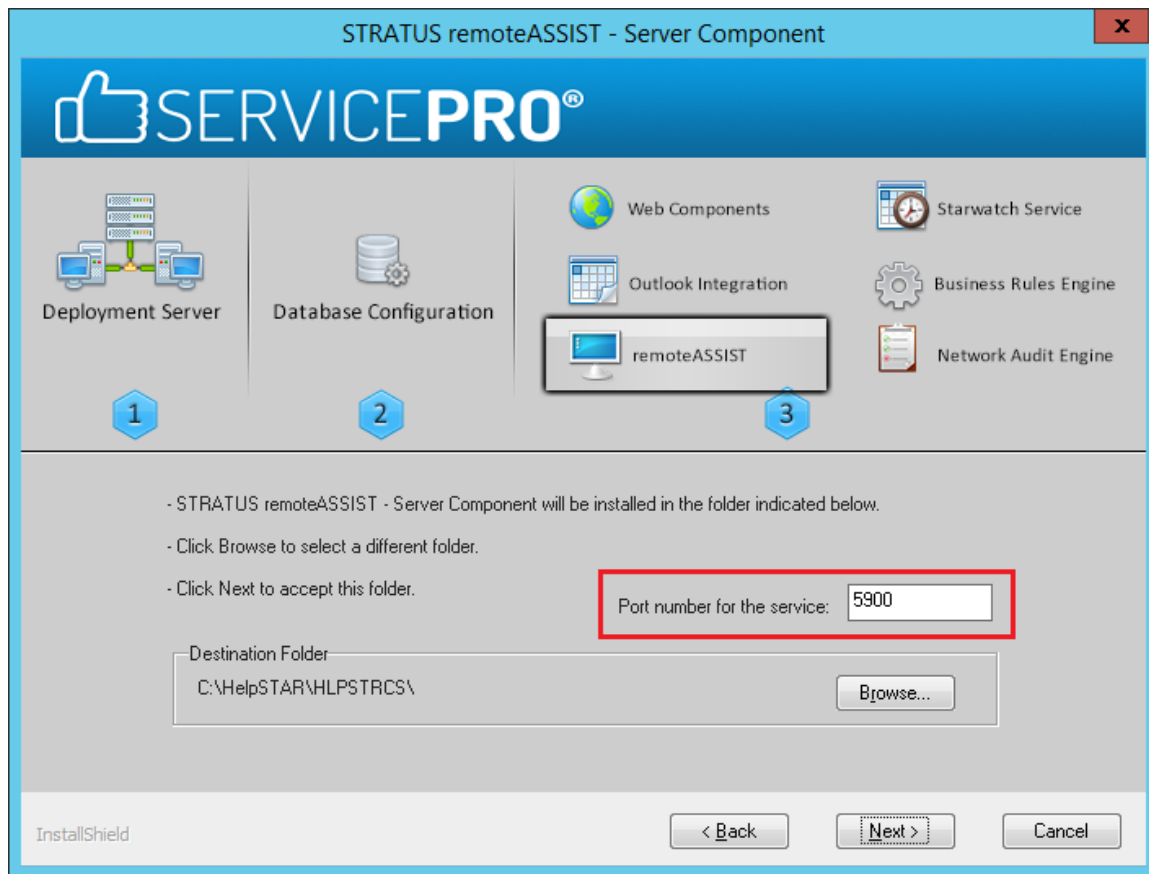
## Part 2 – Screen Sharing Service

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



Click **Next** to continue.

**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.

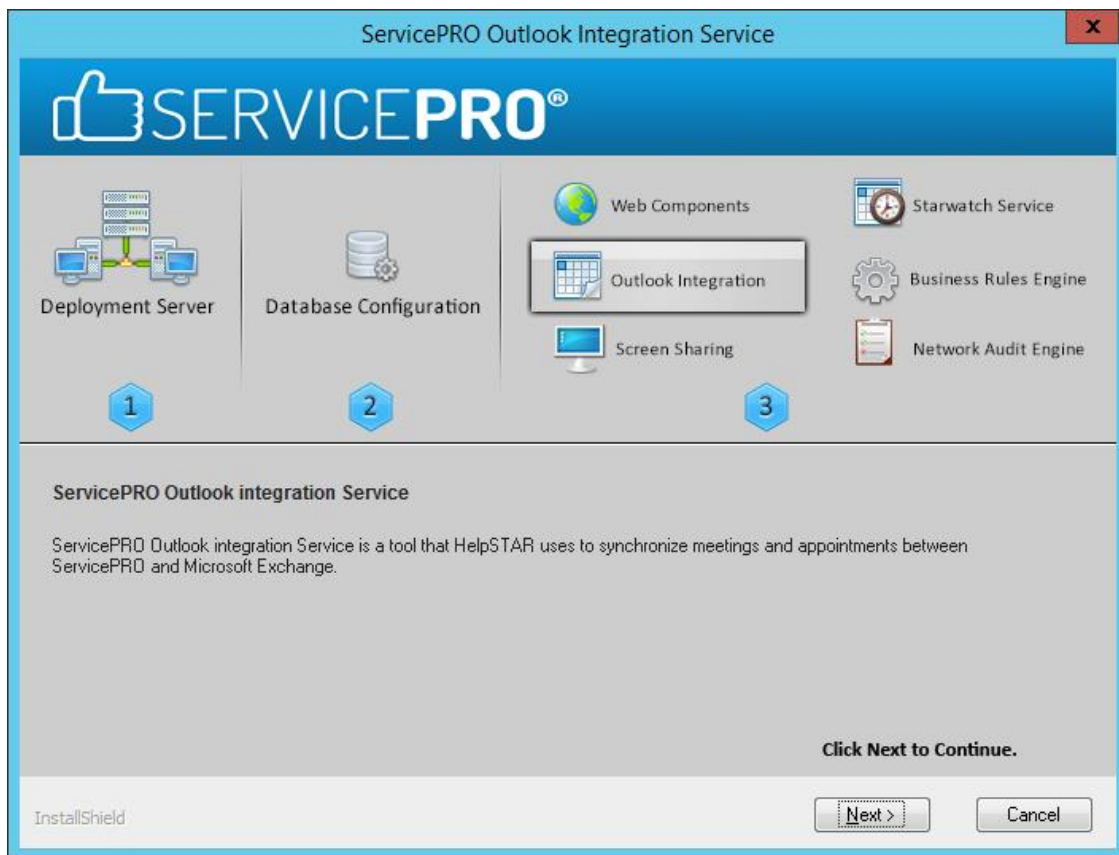


A confirmation will appear upon successful completion of the Screen Sharing installation

### 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.



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.

- Open the Exchange Management Shell on your Exchange Server.
- 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.

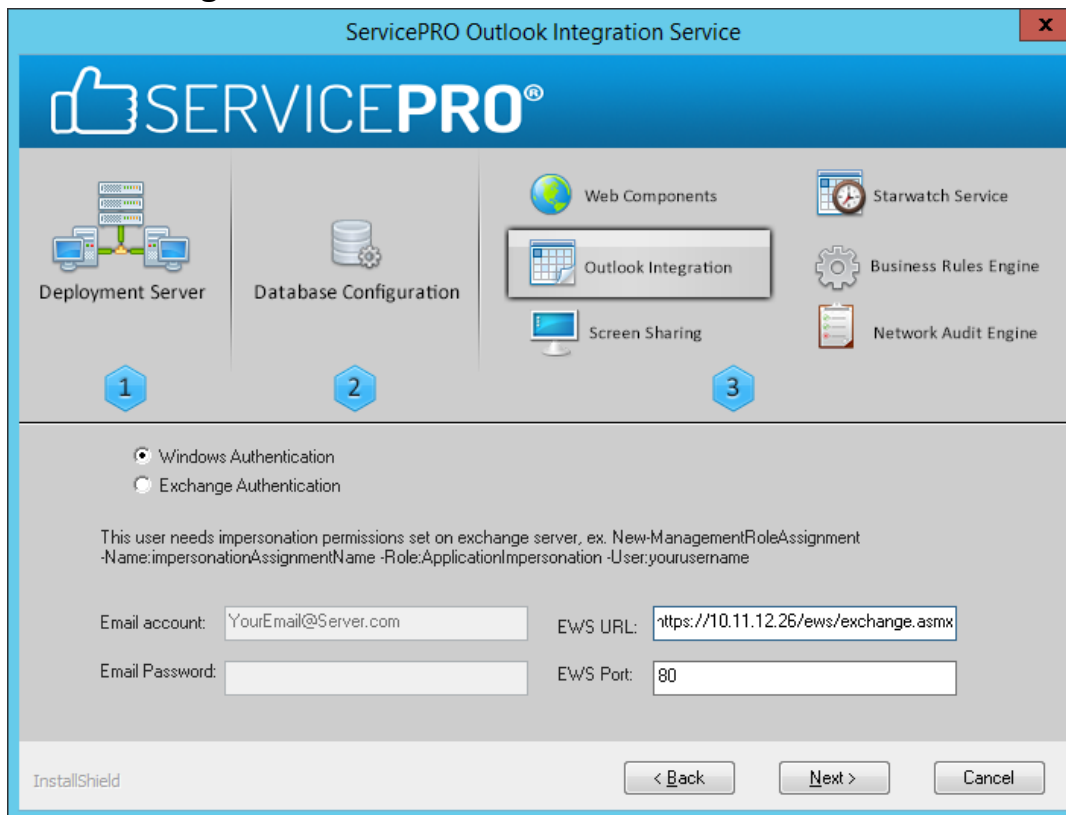
### References:

For more information, see the following reference articles from the Microsoft library:

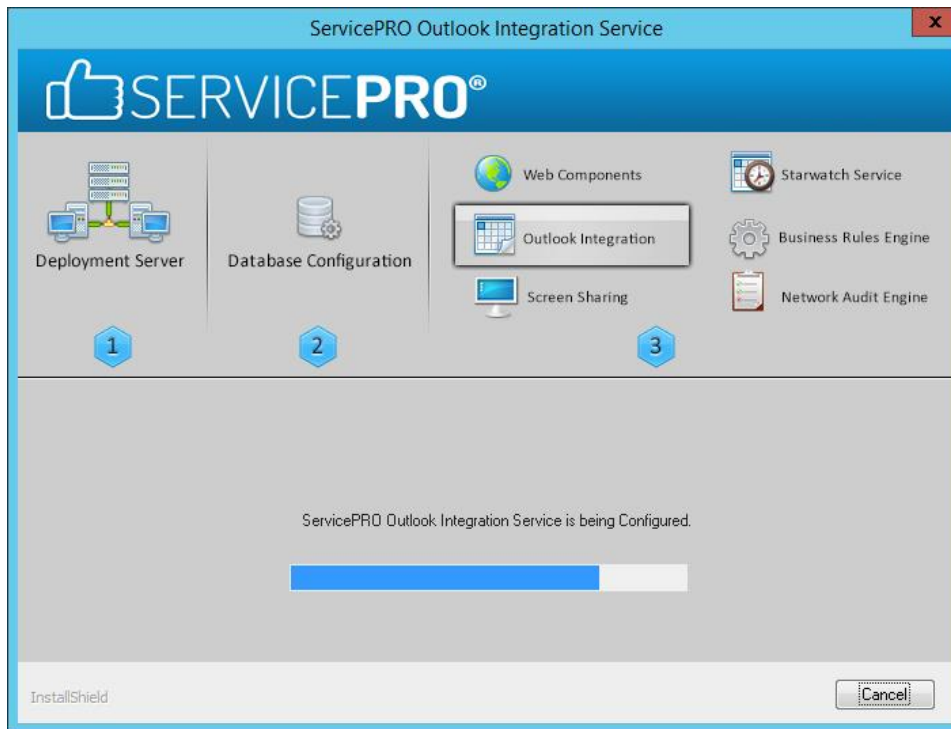
<http://msdn.microsoft.com/en-us/library/bb204095.aspx>

<http://msdn.microsoft.com/en-us/library/bb204095%28v=exchg.80%29.aspx>

### Outlook Integration Service Visual Overview







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

## Part 4 – StarWatch Service

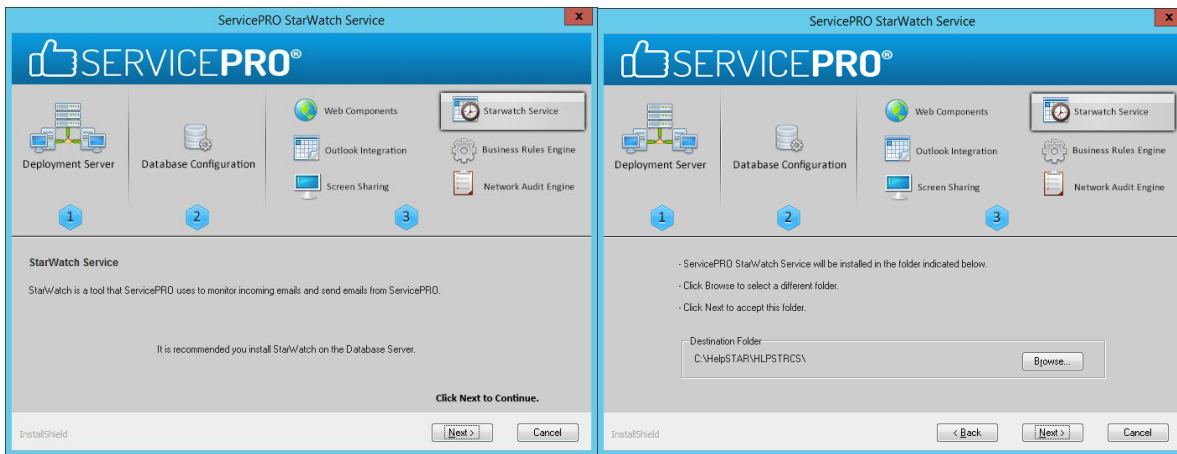
The ServicePRO StarWatch service is a background component that is required for many of the monitoring activities that affect workflow. These activities include generating alerts, automatic email updates, processing incoming/ outgoing emails, request scheduling and Active Directory import/synchronization.

### ServicePRO StarWatch Installation Prerequisites:

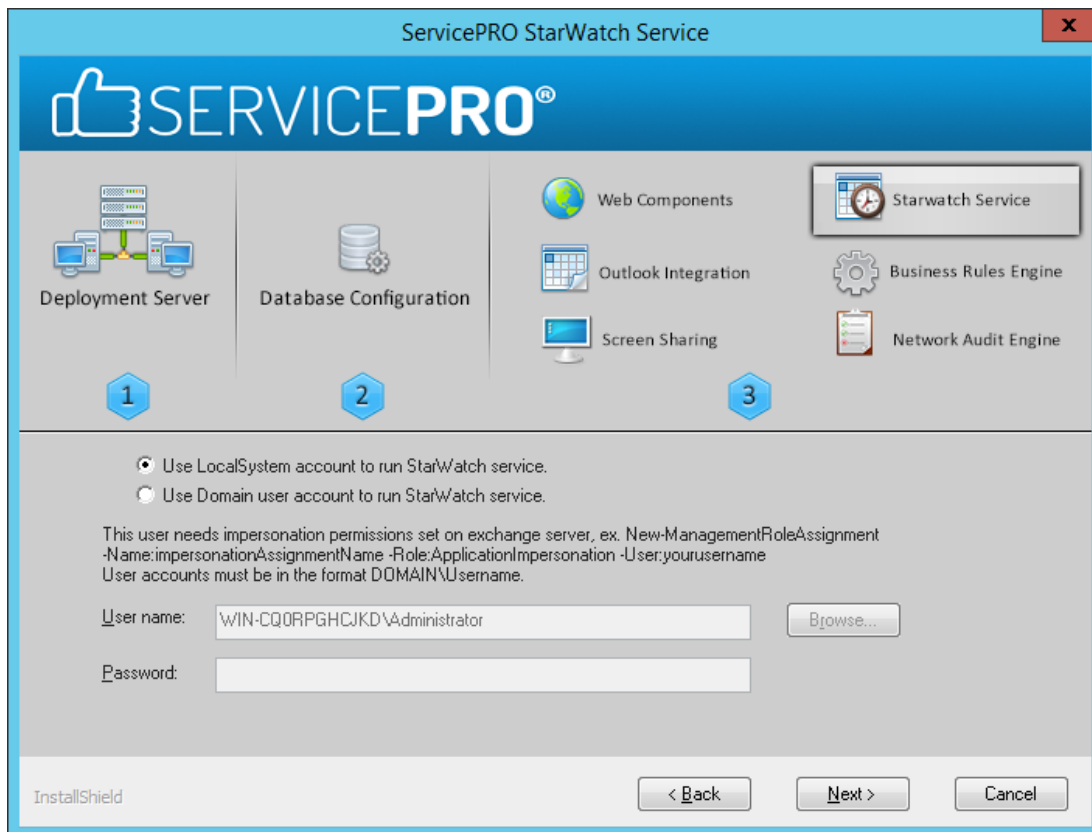
Starwatch Service can be configured to run either with Local System Account or a domain User account.

- 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.

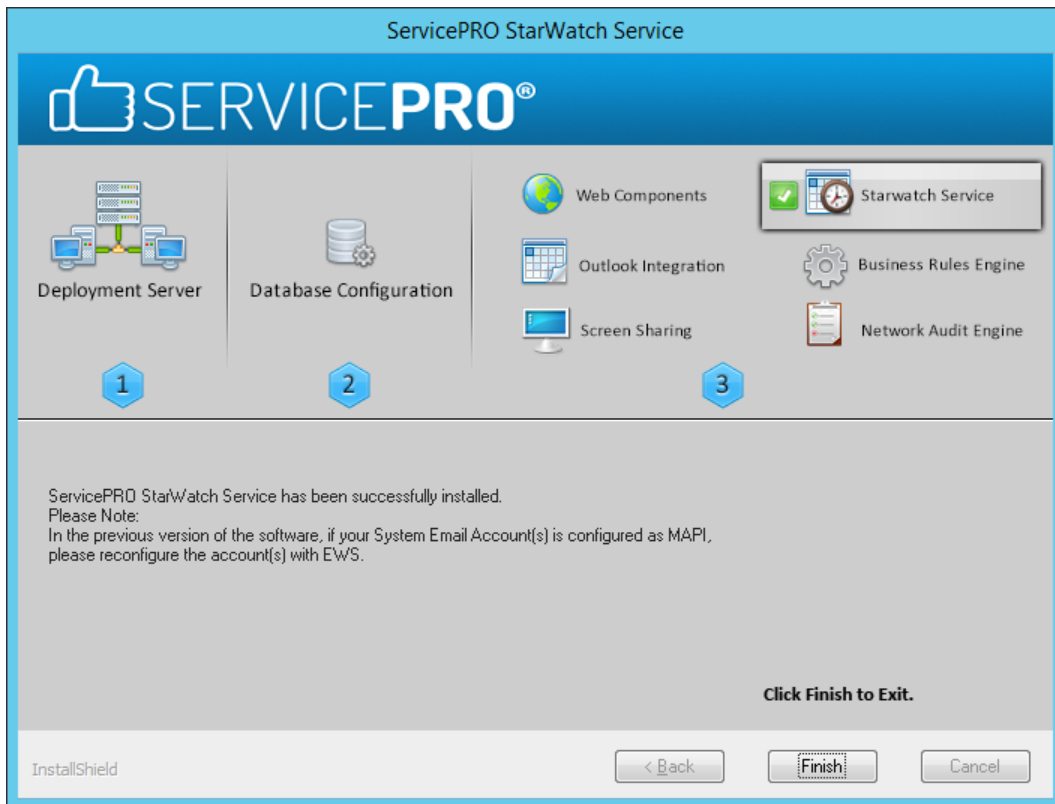
1. On the server in which you want to install the StarWatch Service, navigate to the ServicePRO Deployment Server folder (\HelpSTAR\HLPSTRCS\). 2. Click on the “Install.exe” file.
3. Check the StarWatch Service option and click **Next**.
4. Specify the location in which StarWatch Service files will reside. 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.



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



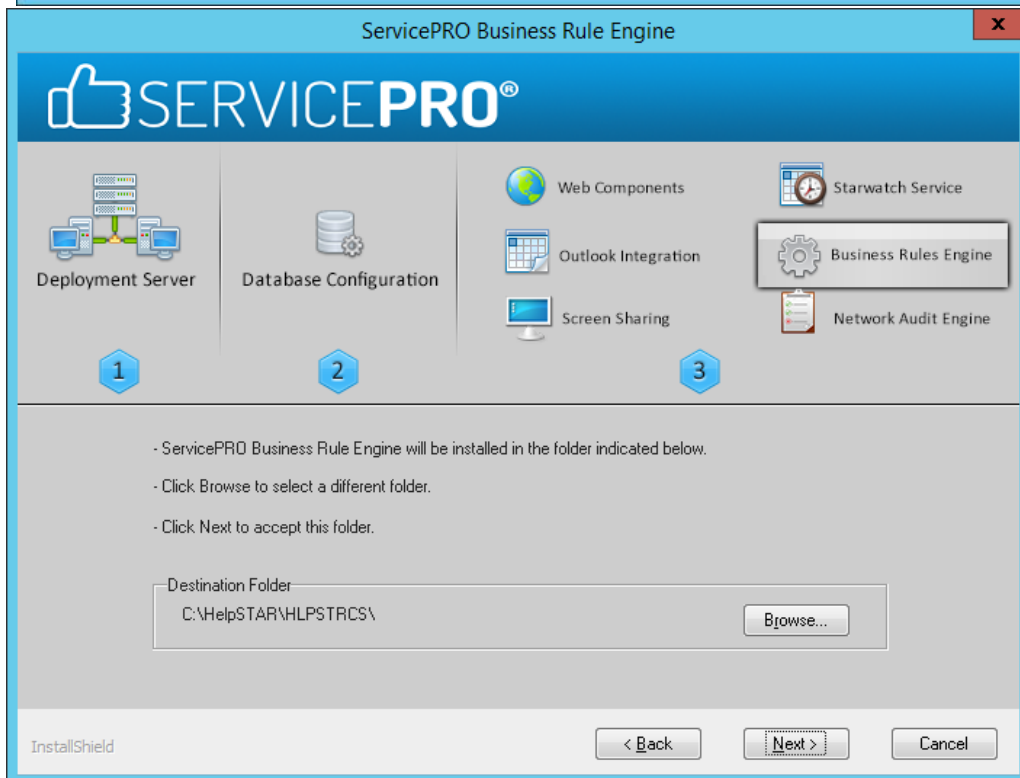
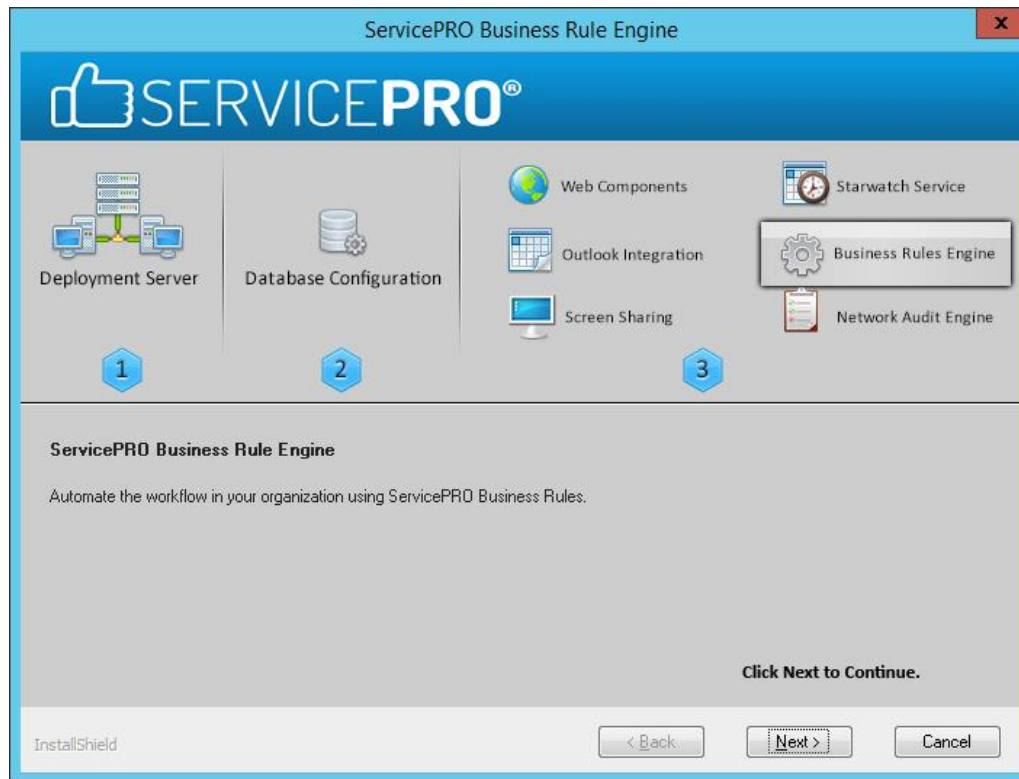
6. A confirmation will appear upon successful completion of the StarWatch Service installation.

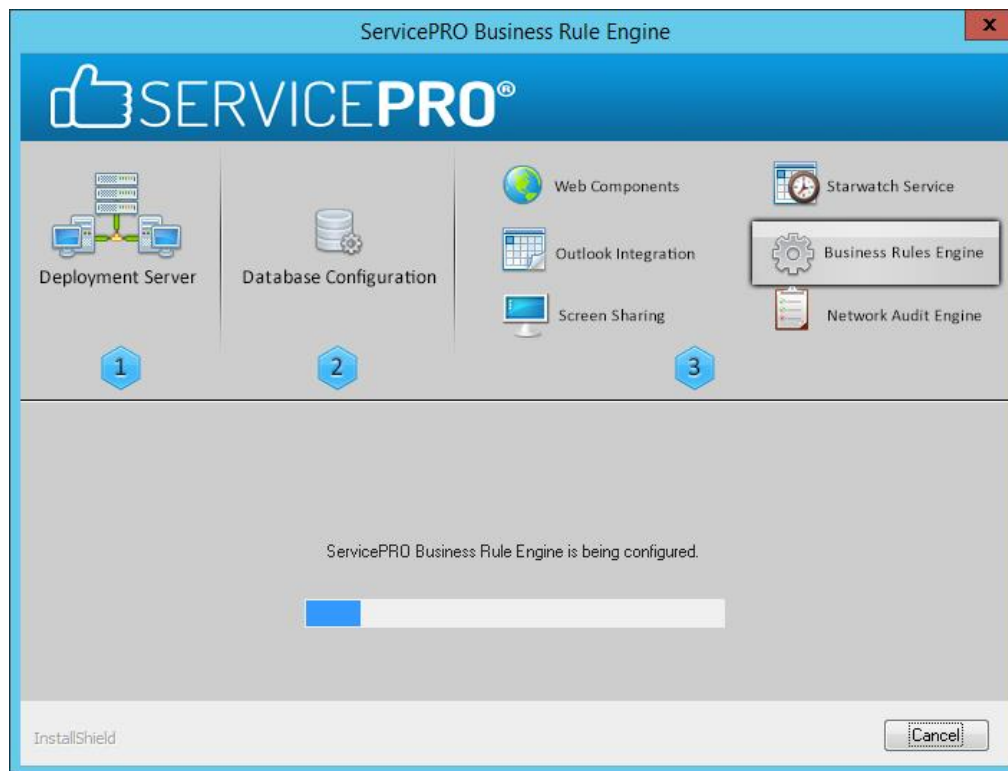


## Part 5 – Business Rules Engine

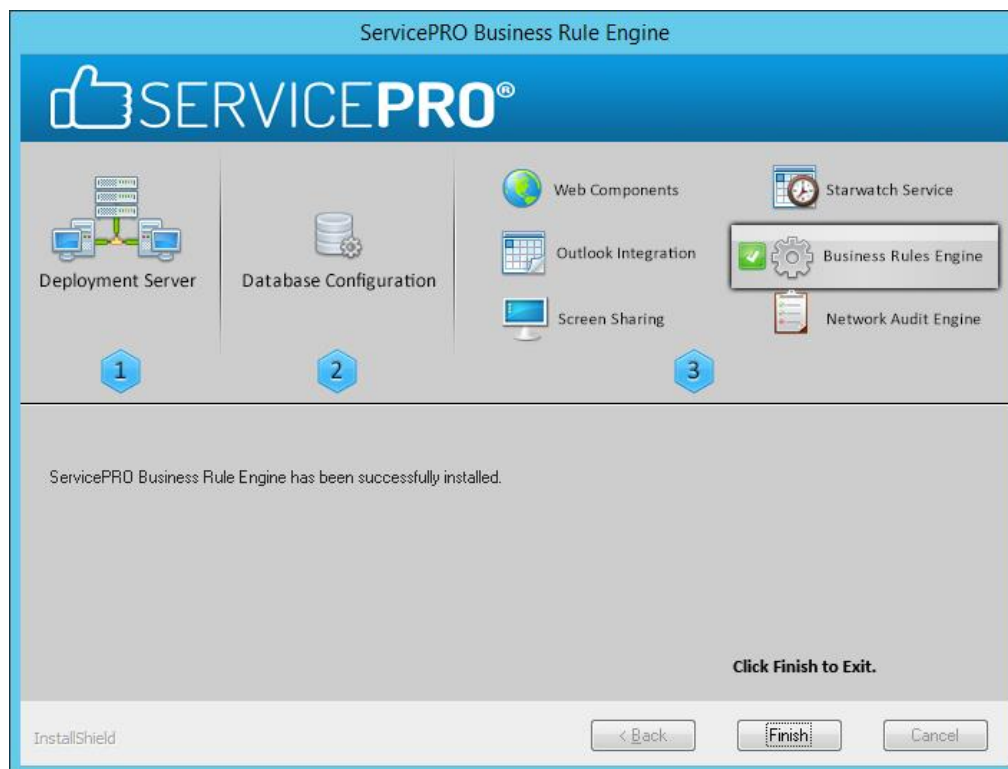
ServicePRO's Business Rules Engine is a required service for the use of ServicePRO's Business Rules functionality.

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.
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.





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



## Part 6 – Network Audit Engine Installation & Configuration

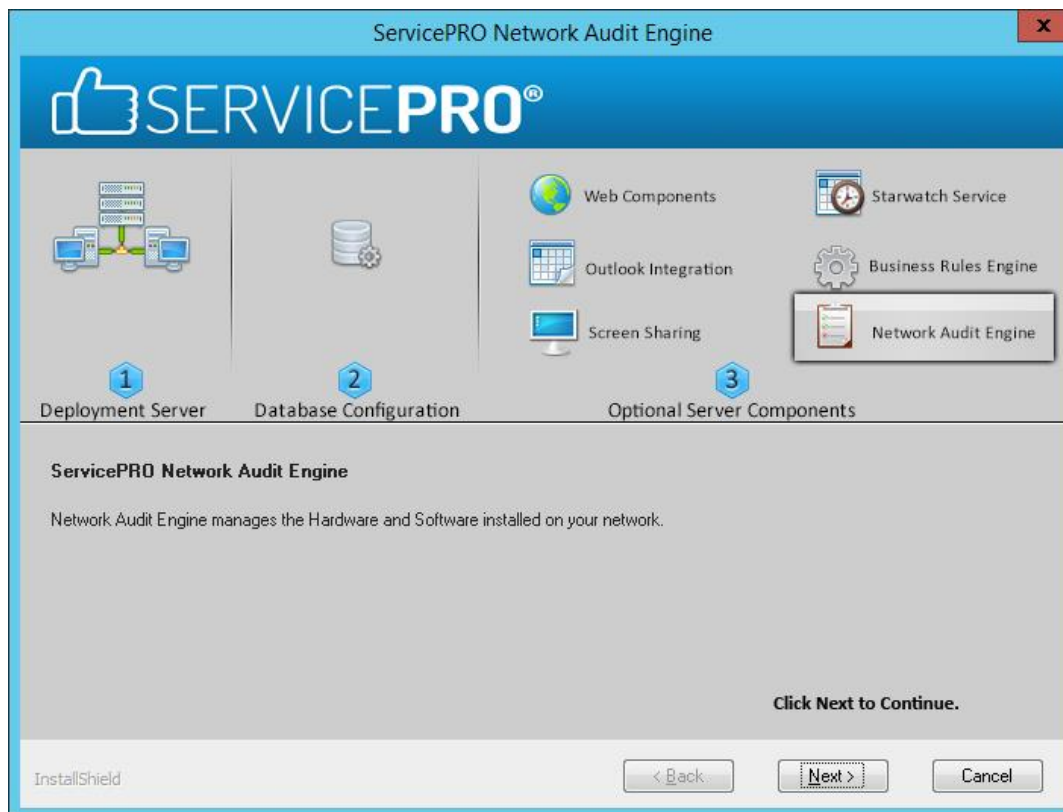
Using the Network Audit Service, you can remotely collect detailed hardware and software information about the machines on the networks you manage. This information is automatically stored in the ServicePRO database.

### Prerequisites:

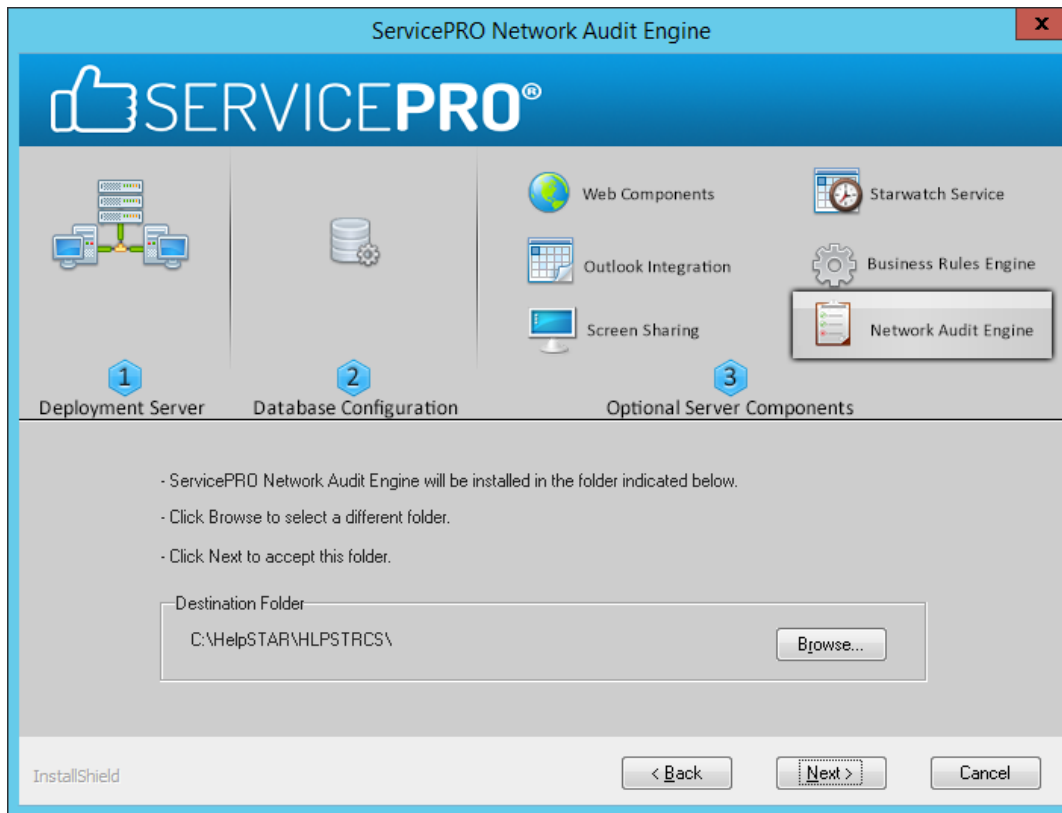
- The Network Audit Engine must be run as a domain user that has administrative rights on the machines being audited. If Windows Authentication is used, this domain administrator must be authenticated to the database.

### Network Audit Engine Installation:

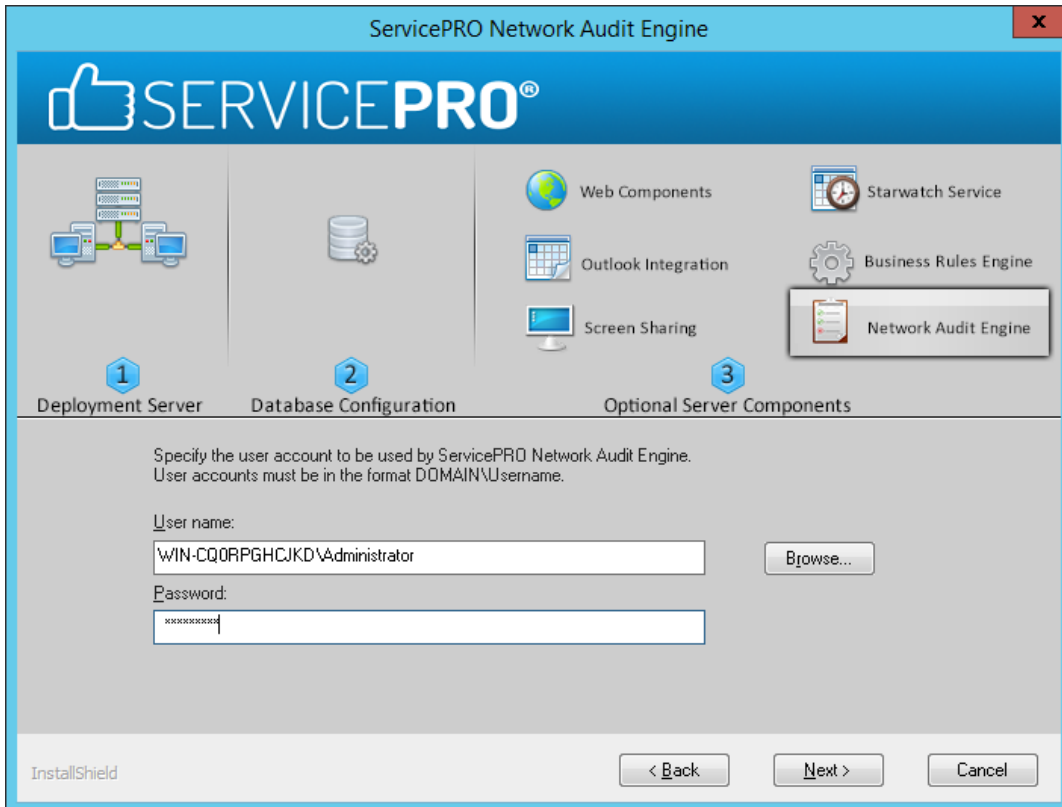
1. On the server in which you want to install the Network Engine, navigate to the ServicePRO Deployment Server folder (\HelpSTAR\HLPSTRCS\).
2. Click on the “Install.exe” file.
3. Check the Network Audit Engine option and click **Next** to proceed.



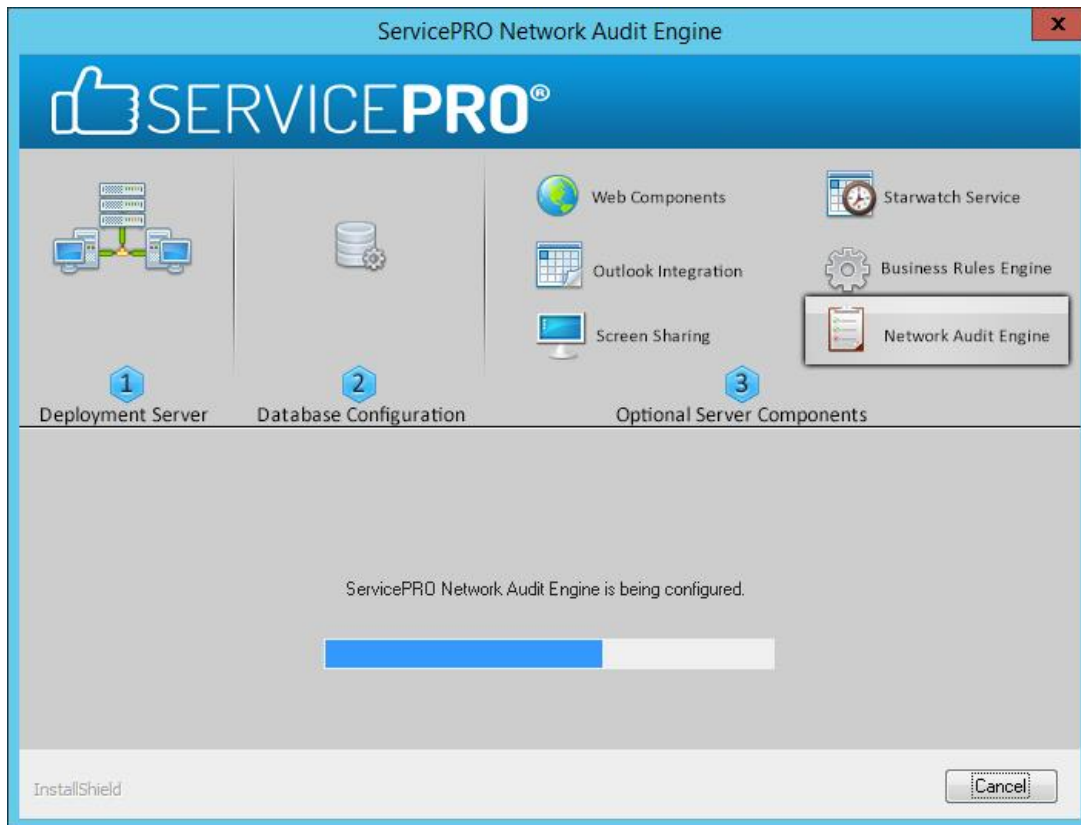
4. Specify the location in which Network Audit Engine files will reside. A default location will be provided (C:\HelpSTAR\HLPSTRCS). The location can be altered by clicking on the Browse button.
5. In the location specified, the subfolder \Modules\AuditService will be created. Click Next.



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



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



## 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:

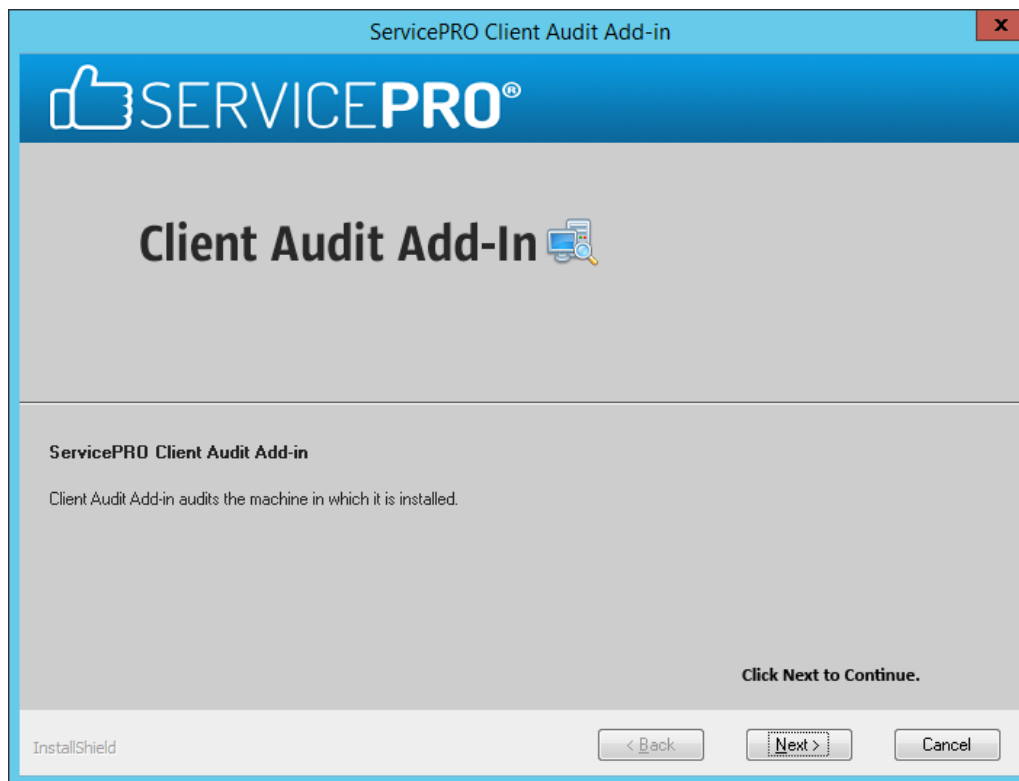
- The ServicePRO Audit Service must be installed on the Deployment Server.
- The user logged into the workstation must have local administrator rights on the machine and must be able to connect directly with the ServicePRO database.

### Notes:

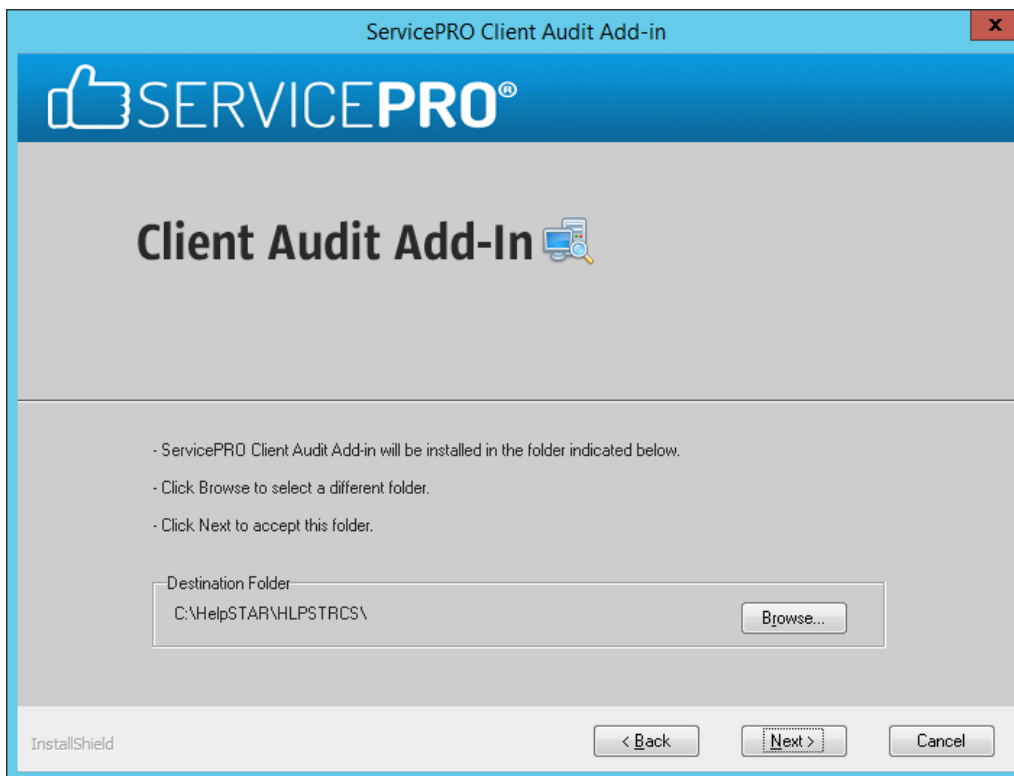
- The Client Audit Add-In service does not have to be installed on the machine hosting the ServicePRO Audit Engine Service.
- In order for the Client Audit Add-In to perform at scheduled intervals, a discovery schedule must be configured.

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.

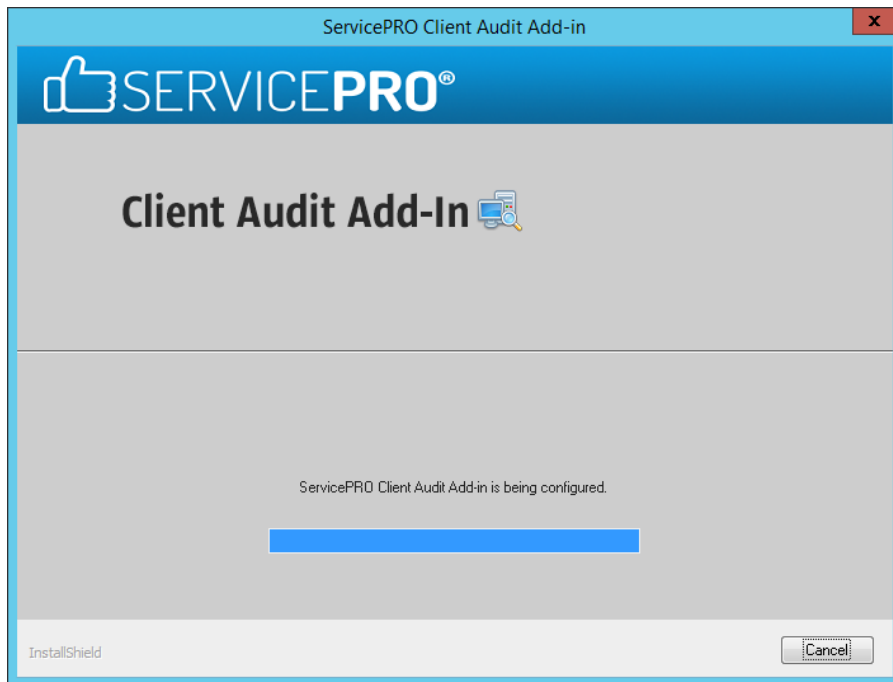




Specify the location in which the Client Audit Add-in files will reside. A default location will be specified (C:\HelpSTAR\HLPSTRCS). The location can be altered by clicking on the Browse button. Click Next when complete.



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



## 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.

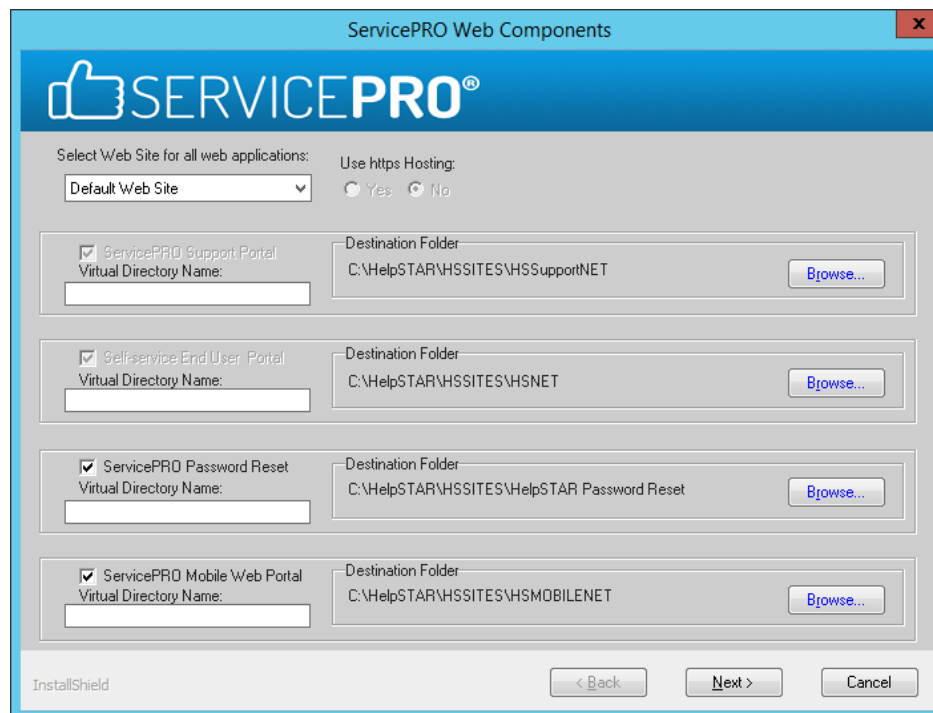
Individual portals must be installed as virtual directories to this web site.

- **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.



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.

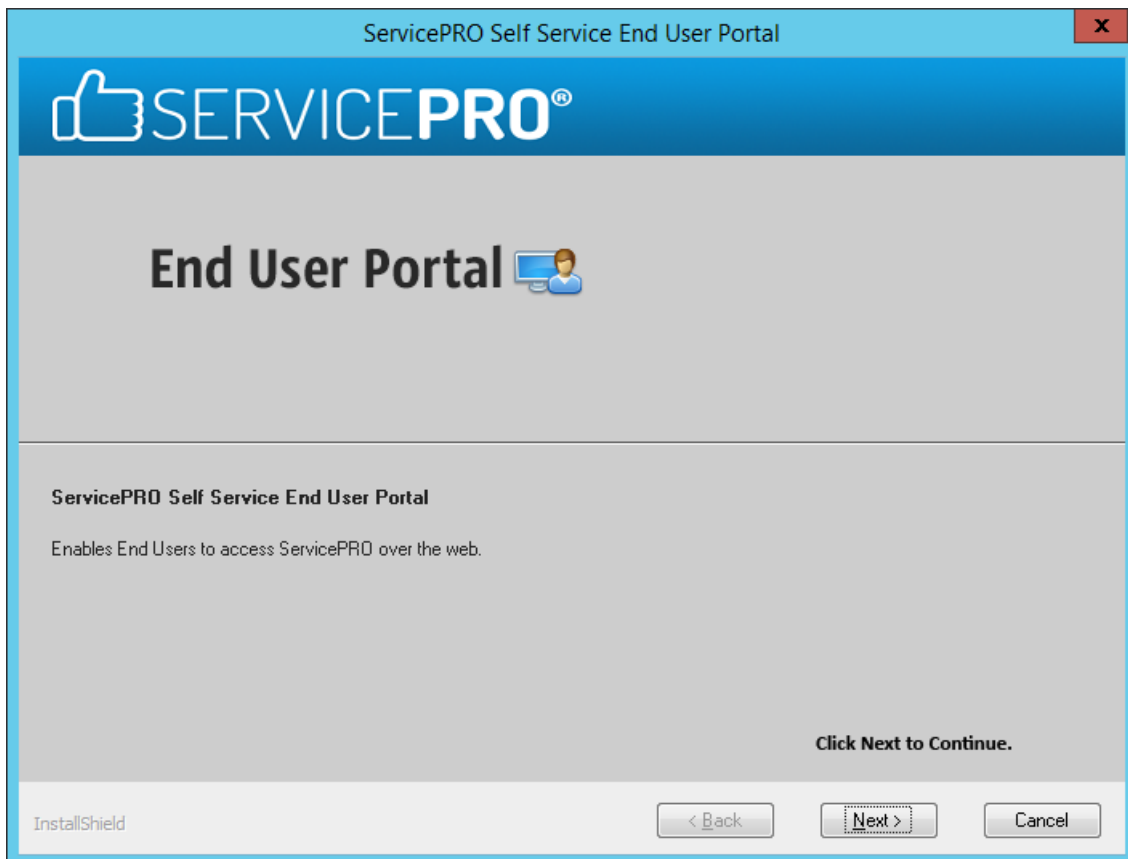
## ServicePRO .Net Web Portal Installation

### 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:

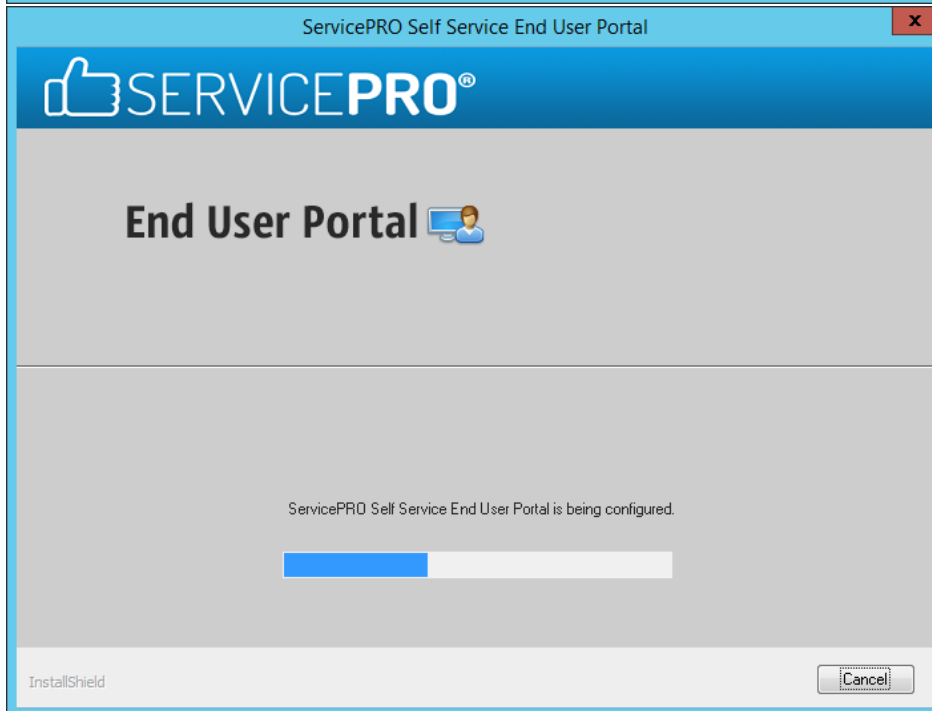
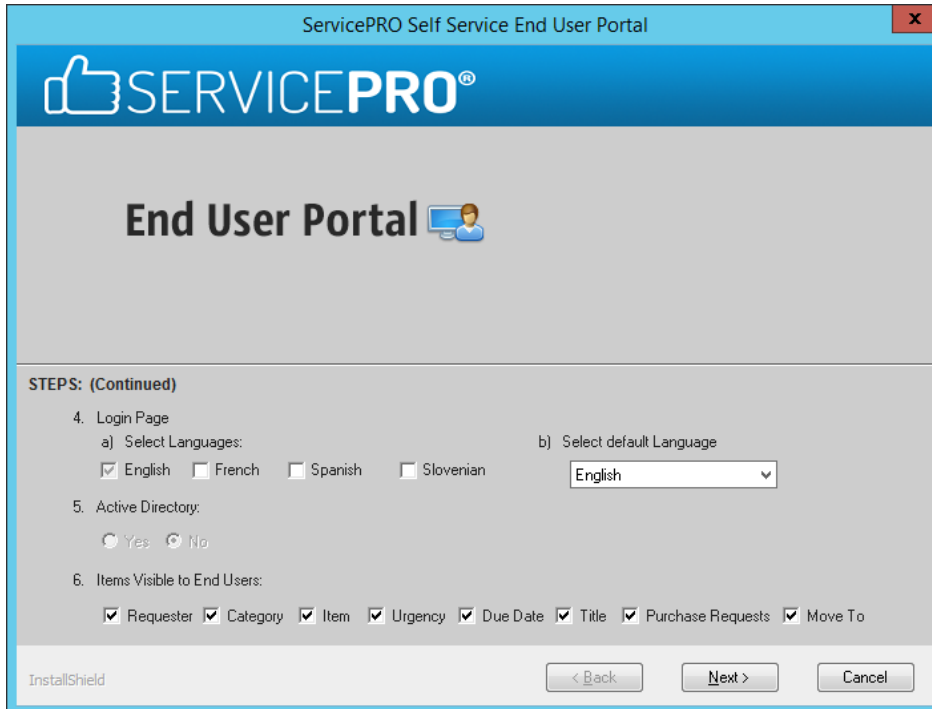
1. If you have selected to install the Web portal, the Web Portal installer will launch.



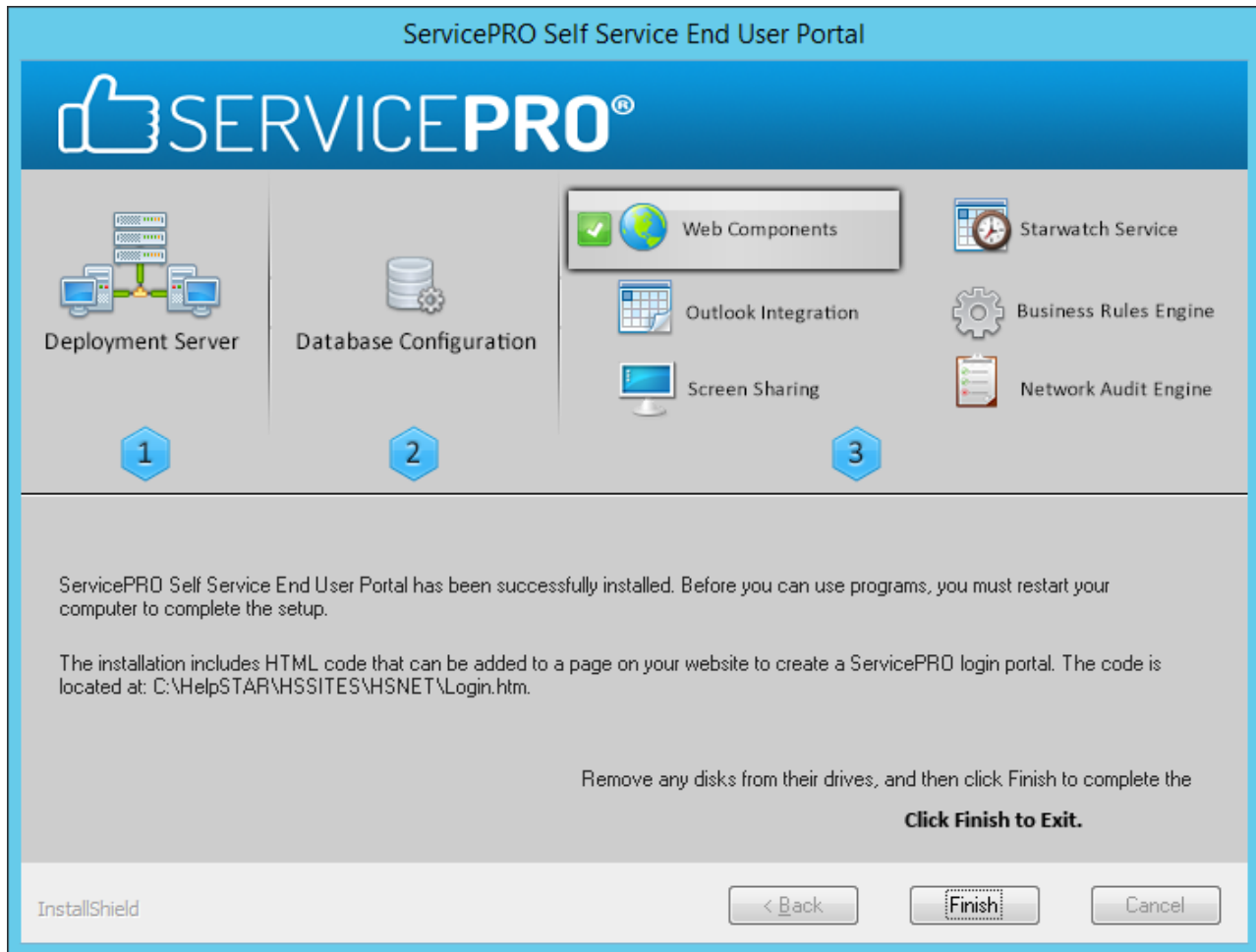
2. On this screen, you will be prompted to select the following options:

- Login Page Language ○ Select the languages that should be made available to the users of the web portal.
  - 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.



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



## 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).



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.

ServicePRO Self Service End User Portal Customization

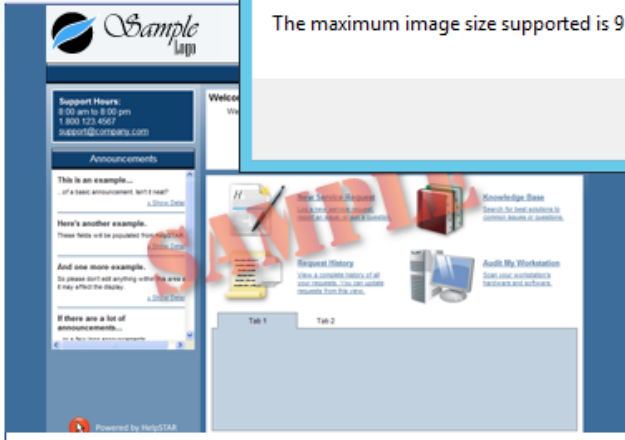
Web Portal Customization

**Customizing the End User Web Portal**  
 Customizing your end user web portal to reflect your company is simple to configure. You can upload your company's logo and then select a basic theme to customize to suit your company's brand.

**1 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\hslimages\blk.gif

**2 Color Theme**  
 Select a basic color theme to match your company logo.



Over Height  
 The maximum image size supported is 950x100 pixels.

er  
ult. Silver on a black background.

marine  
gray on a blue background.

**Aqua**  
Calm blues, on a turquoise background.

**Ruby Red**  
Deep red on a black background.

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.



ServicePRO Self Service End User Portal Customization
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Web Portal Customization

### Customizing the End User Web Portal

Customizing your end user web portal to reflect your company is simple to configure. You can upload your company's logo and then select a basic theme to customize to suit your company's brand.

**1 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\slimages\blk.gif
Browse

**2 Color Theme**

Select a basic color theme for your end user web portal.

Preview Current Theme

**Silver**

Default. Silver on a black background.

Select Theme

**Submarine**

Dark gray on a blue background.

Select Theme

**Aqua**

Calm blues, on a turquoise background.

Select Theme

**Ruby Red**

Deep red on a black background.

Select 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.

Help Desk Technology

[www.ServicePRO.solutions](http://www.ServicePRO.solutions)

Main/Background Color	
The background color of the the web portal.	
Colour <input type="color" value="#3D6D9B"/>	Hex Colour <input type="text" value="3D6D9B"/>
Secondary/Header Color	
The color appearing in headers (for example Announcements, and the Support Hours box.)	
Colour <input type="color" value="#0F416F"/>	Hex Colour <input type="text" value="0F416F"/>
Tertiary Color	
The color in tabs.	
Colour <input type="color" value="#C1D1DF"/>	Hex Colour <input type="text" value="C1D1DF"/>
Other	
Depending on the color of the secondary/header color you may need to change the font color here	
<input checked="" type="radio"/> White	<input type="radio"/> Black
Depending on the color of the background you may need to change the image color here.	
<input checked="" type="radio"/> White	<input type="radio"/> 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 Service End User Portal Customization
-
□
✕

Web Portal Customization

**3 Customizing the End User Web Portal**

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

**Secondary/Header Color**

The color appearing in headers (for example Announcements, and the Support Hours box.)

Colour  Hex Colour

**Tertiary Color**

The color in tabs.

Colour  Hex Colour

**Other**

Depending on the color of the secondary/header color you may need to change the font color here

White     Black

Depending on the color of the background you may need to change the image color here.

White     Black

**4 Enter Service Desk Details** Support Hours

Provide your service desk's hours of operation, contact number and URL for your web portal.

Support Hours:

Tel:

Web Page:

Enlarge View

HTML Viewer
Any m...
imme...

Support Hours: 8:00 am to 8:00 pm

Tel: 1-800-563-4357

Web Page:

Welcome to the end user web portal...

**Announcements**

This is an example... of a basic announcement. Is it real? a, Show Details

Here's another example. These items will be processed from HelpSTAD. a, Show Details

And one more example. To please don't call anything within this area if it may affect the display. a, Show Details

If there are a lot of announcements...

**Request History**

View a complete history of all your requests. You can update requests directly from here.

**User Profiles**

View and update your user details.

**Open Requests**

Id	Title	Last Logged	Support Bar
000001	Unable to add attachments	12/09/2018 09:08	(None)
000002	Unable to access F Drive	05/17/2008 08:55	(None)

« Back
Cancel
Finish

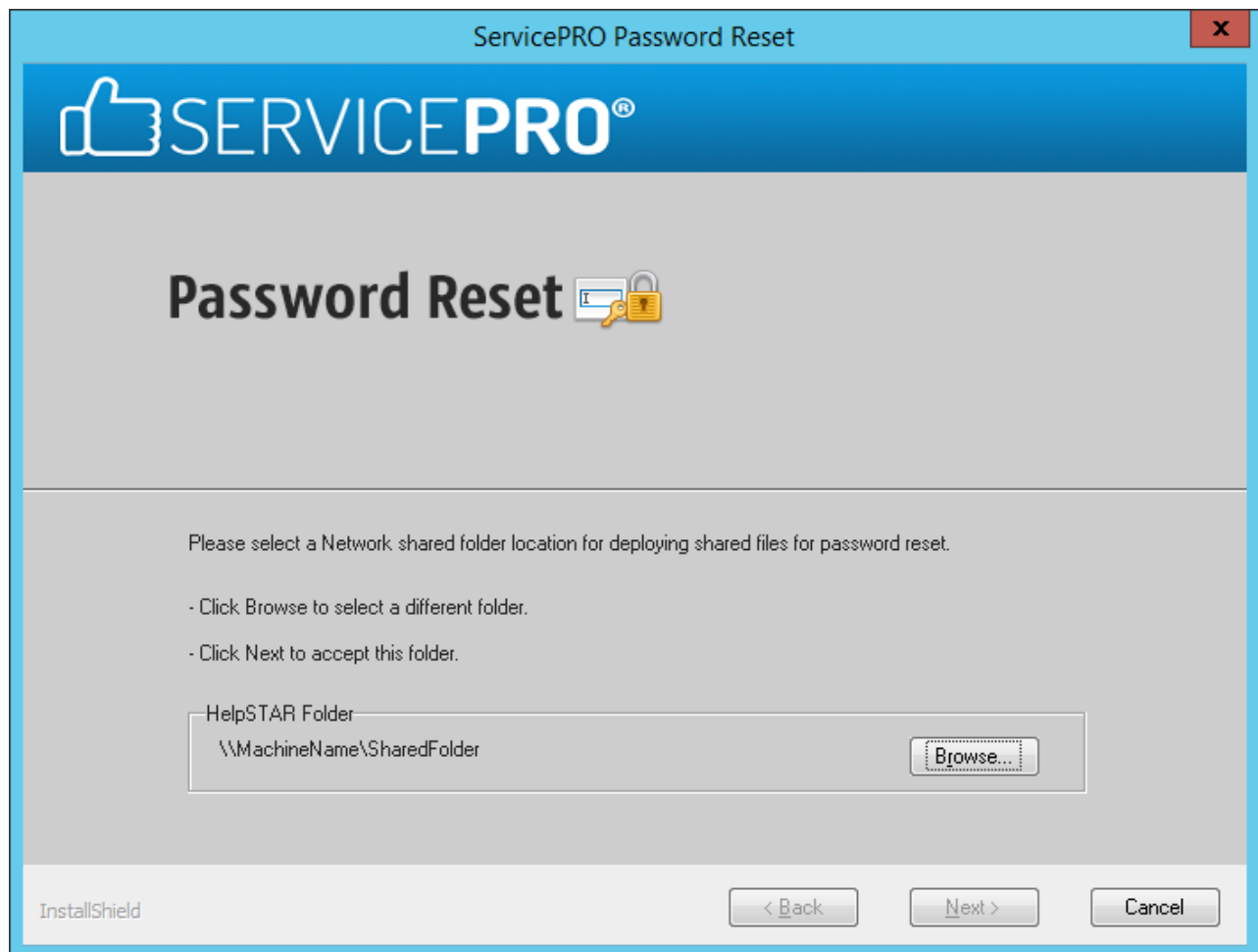
6. **HTML Viewer** – Modifications made to your Web Portal will be reflected immediately. This viewer will allow you to preview the options selected for your customization. Click on Enlarge View to preview your Web Portal on a larger window. Click on Finish to exit the designer.

## ServicePRO Password Reset Installation

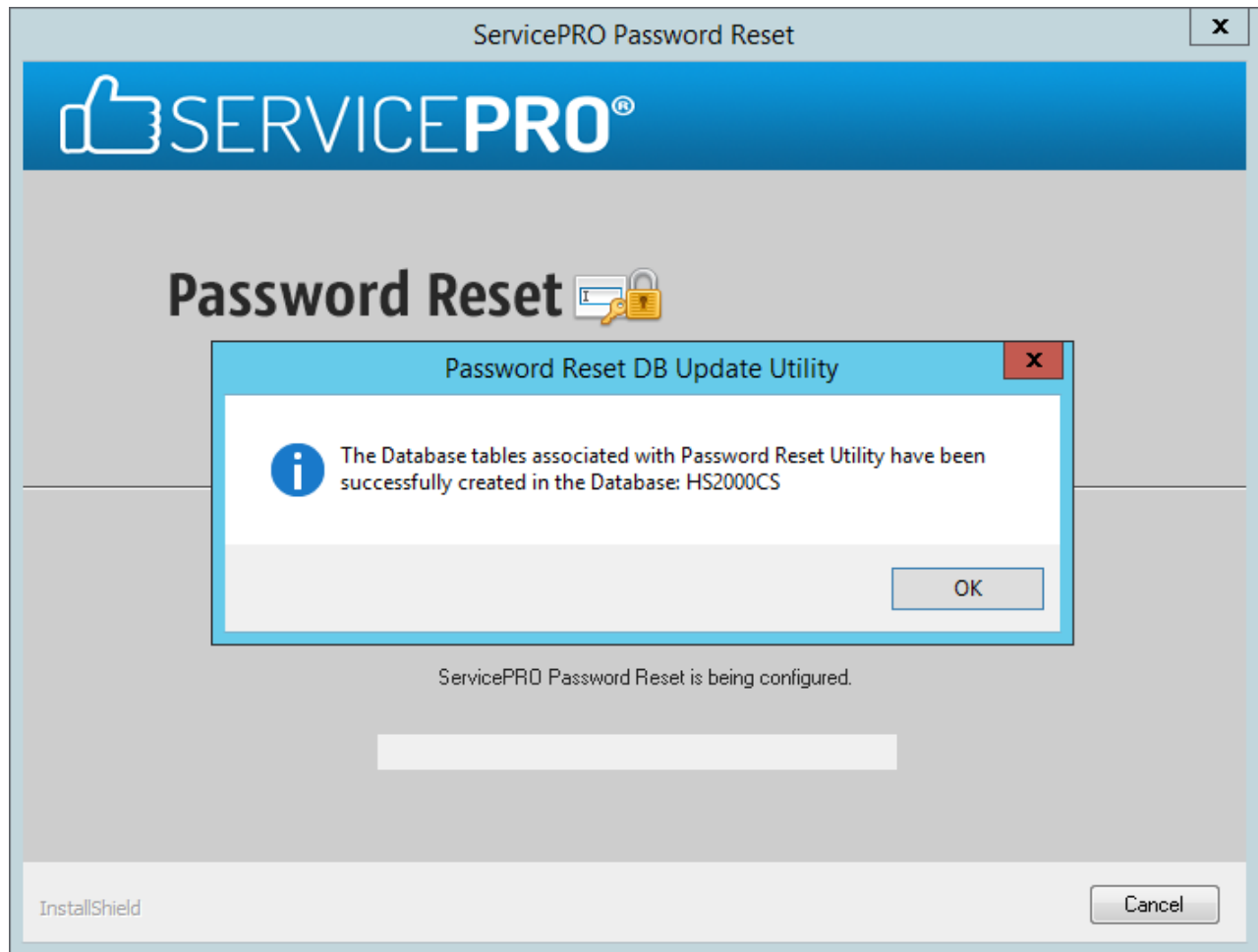
1. If selected, the Password Reset Installation will proceed. Click on Next to proceed.
2. When prompted, review and agree to the ServicePRO license agreement. Click Next.

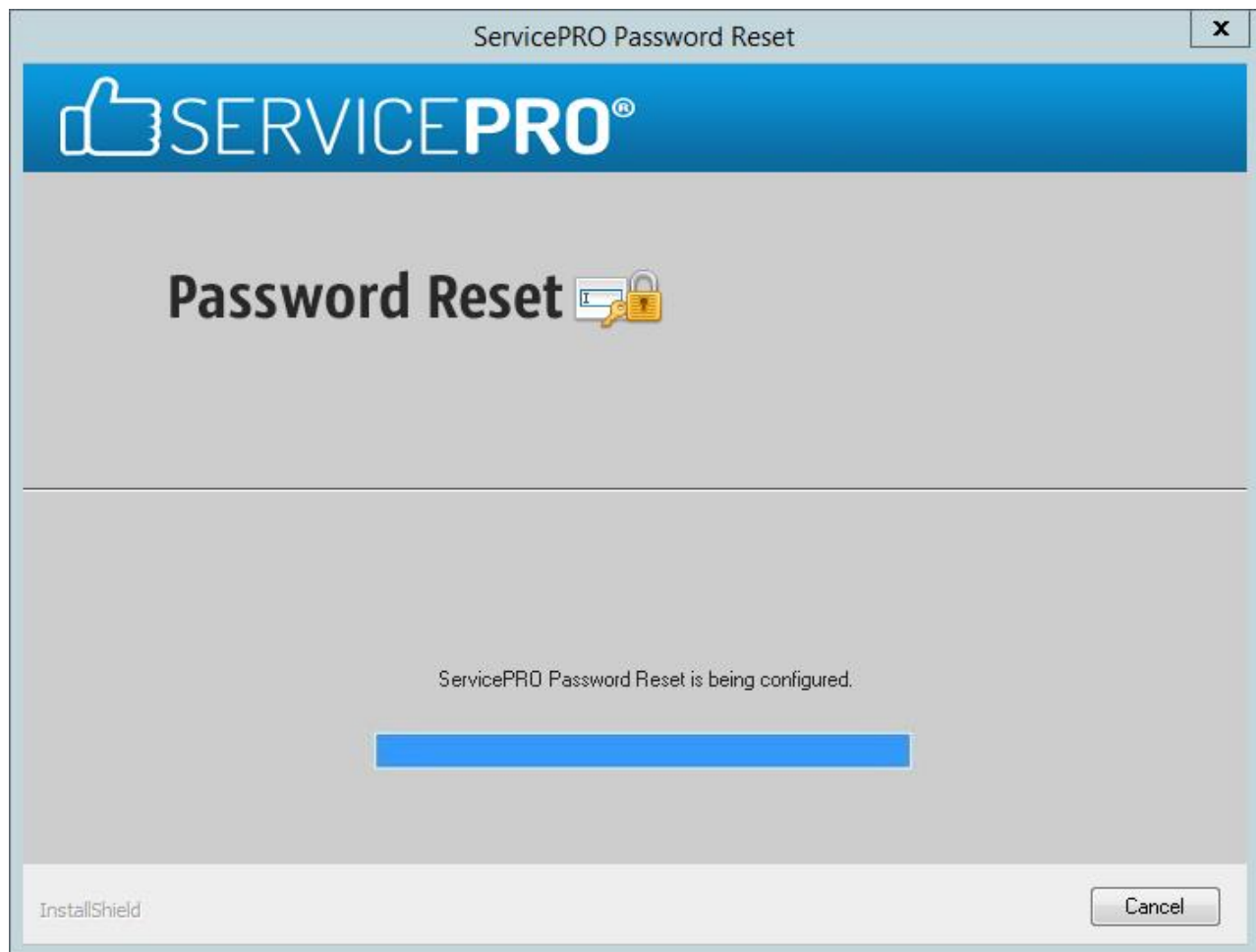


3. You will be prompted to choose a Shared Folder for the Password Reset module.
4. When you click Browse, a window will appear which will allow you to select a folder or enter a network path. Click OK and then Next to proceed.

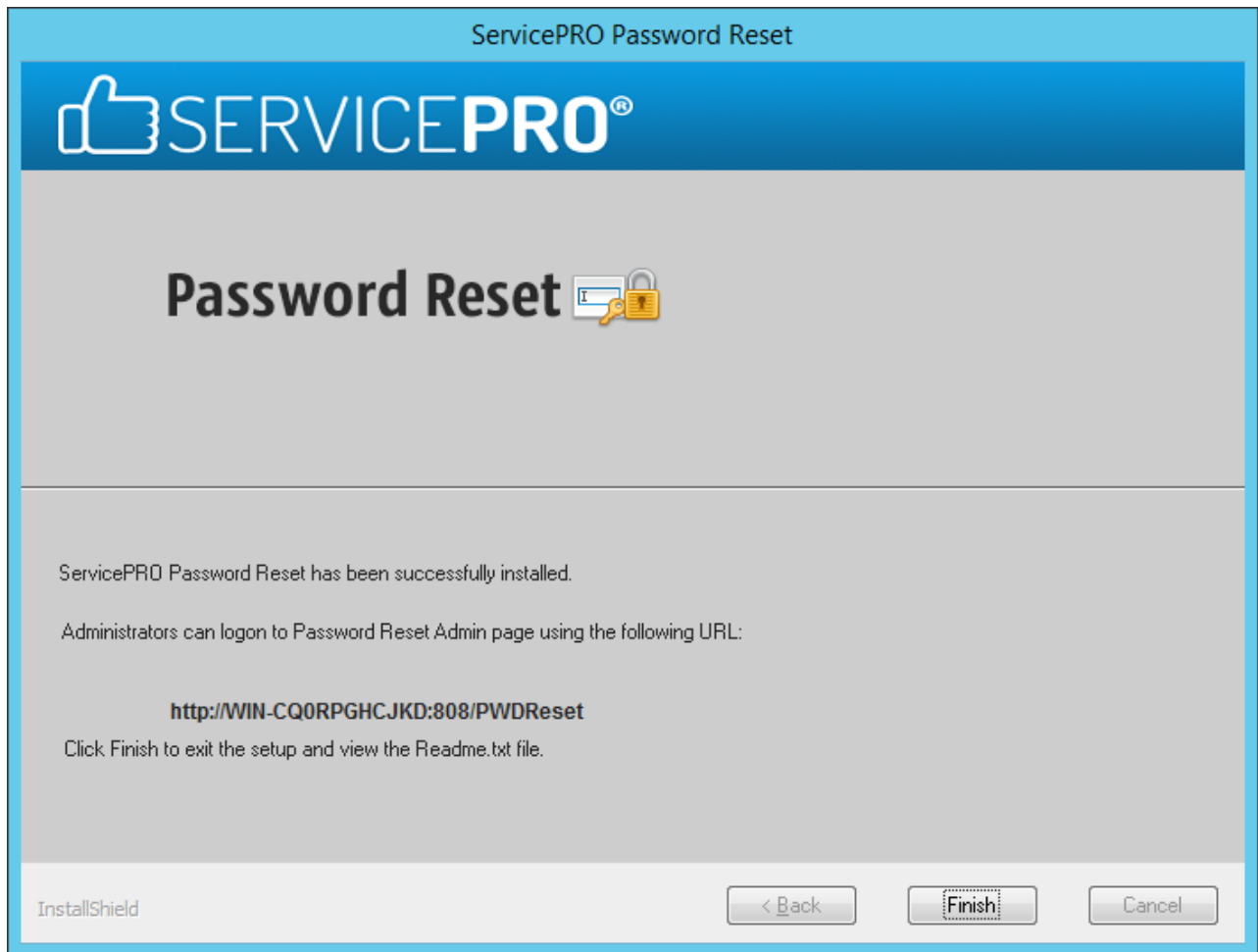


5. The necessary database tables will be created for the Password Reset component. A dialog box will appear when it has been completed.





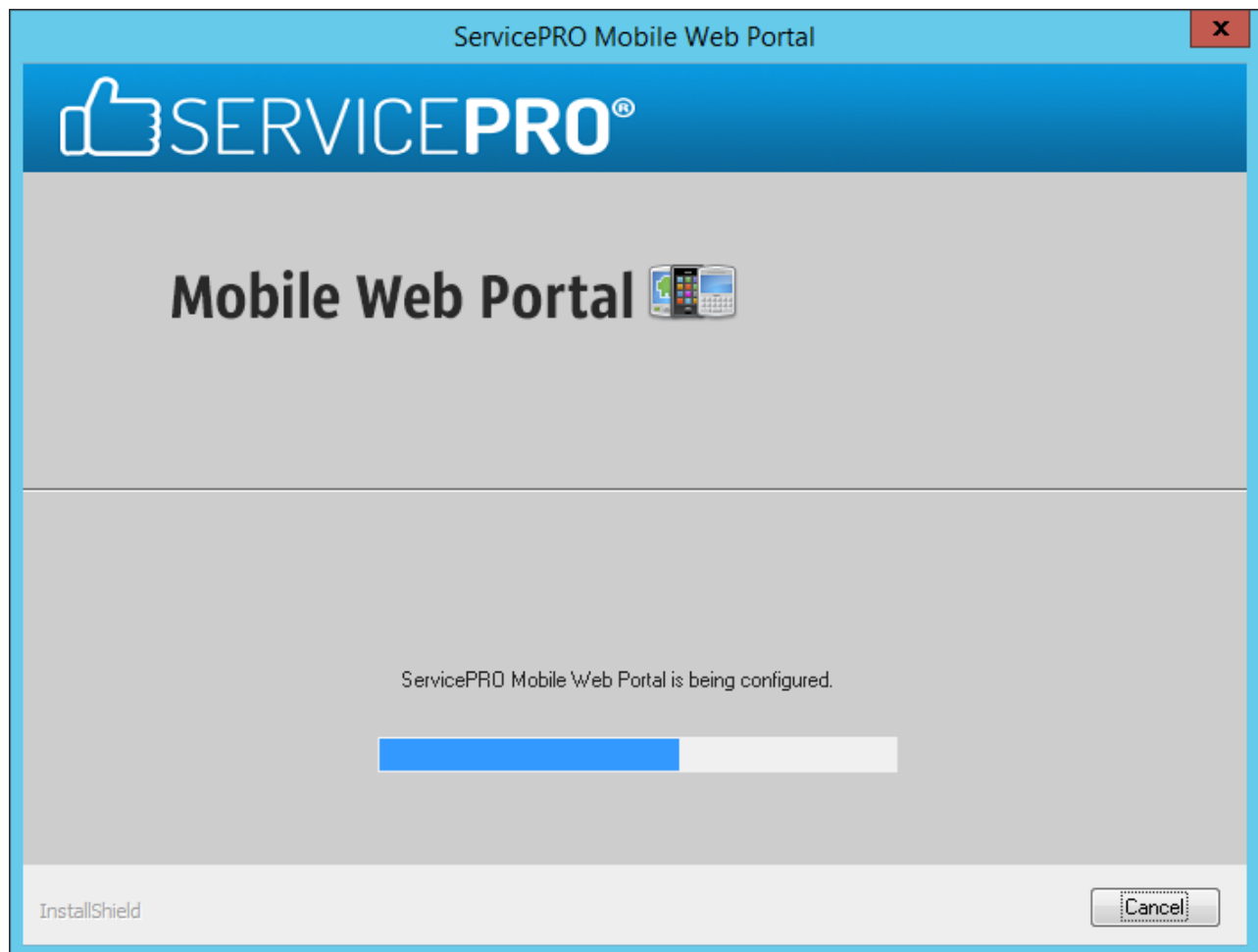
6. A confirmation will appear upon successful completion of the ServicePRO Password Reset installation. The confirmation will also provide web path for the Administration of this component. Click on Finish to proceed to the next component.



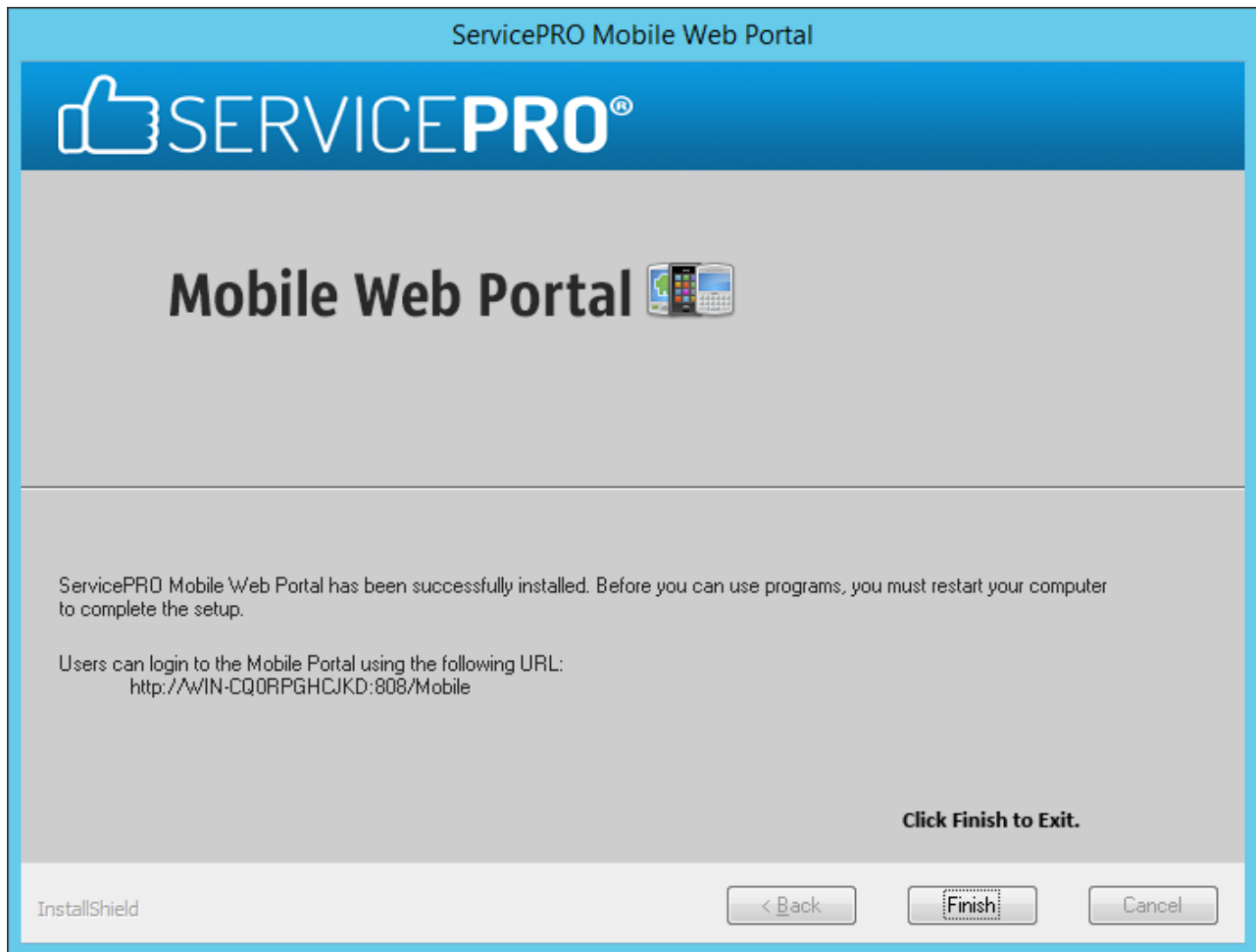
## ServicePRO Mobile Web Portal Installation

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





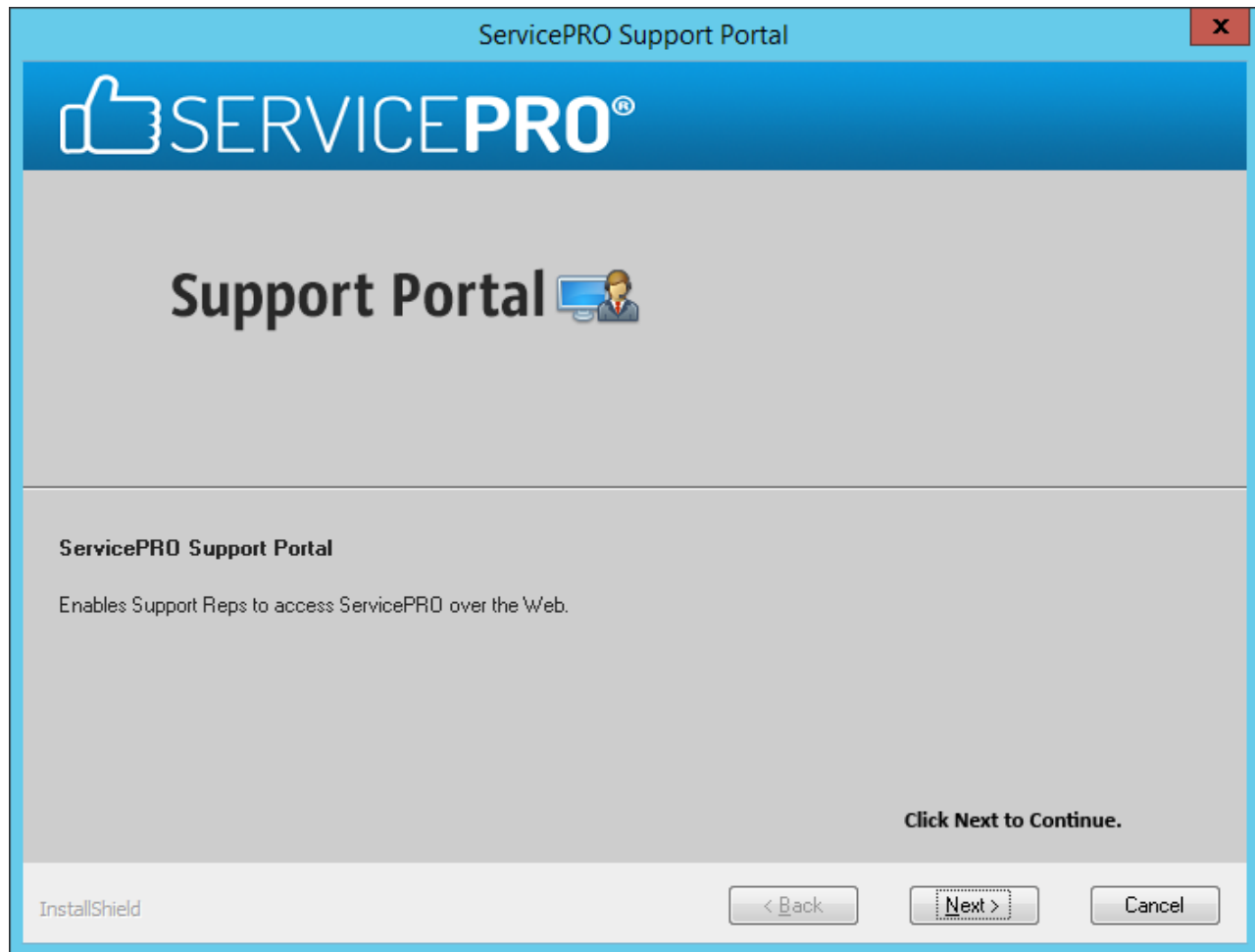
2. A confirmation will appear upon successful completion of the Mobile Web Portal Installation. Click on Finish to proceed to the next component.

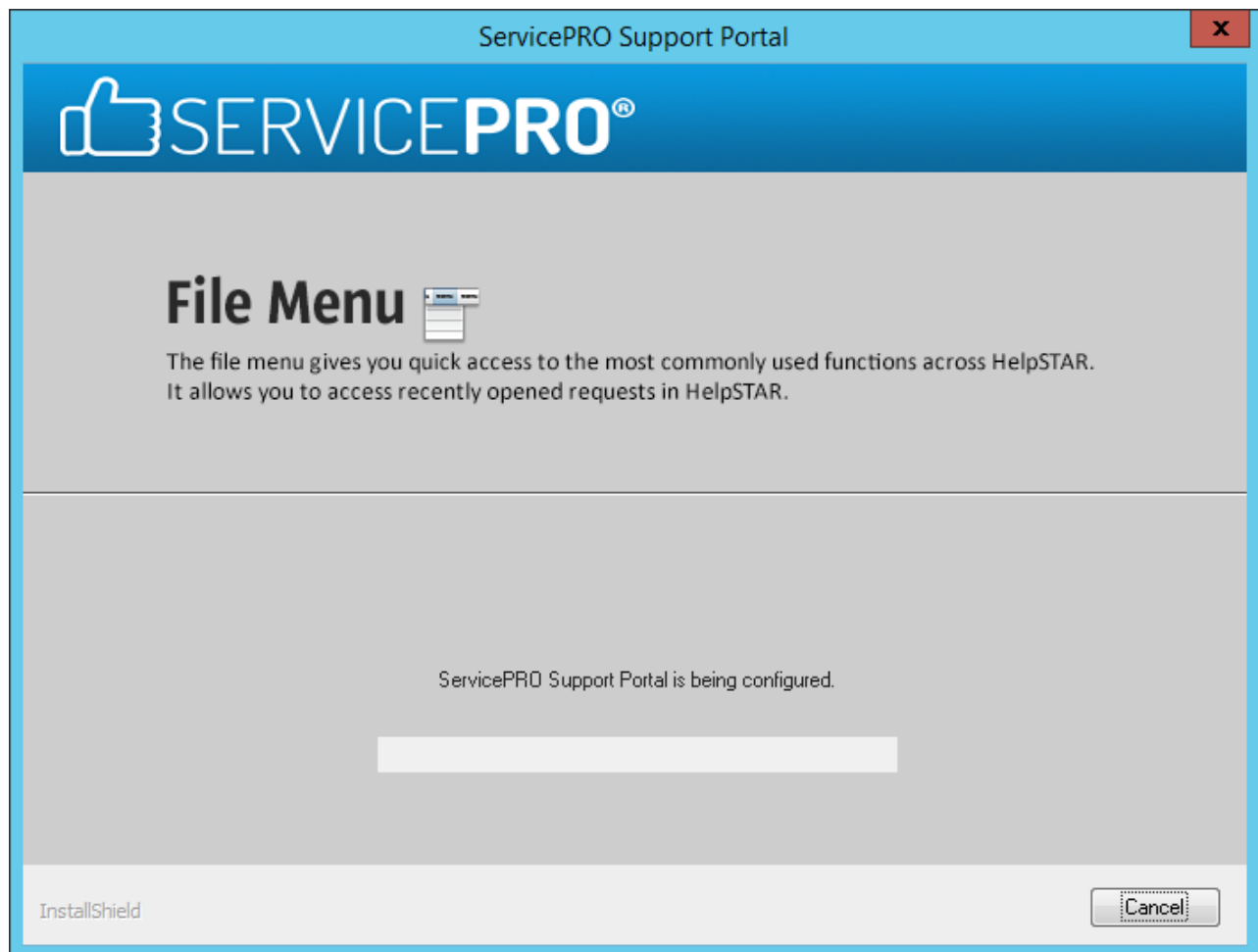


## Part 8 – ServicePRO Support Portal Installation

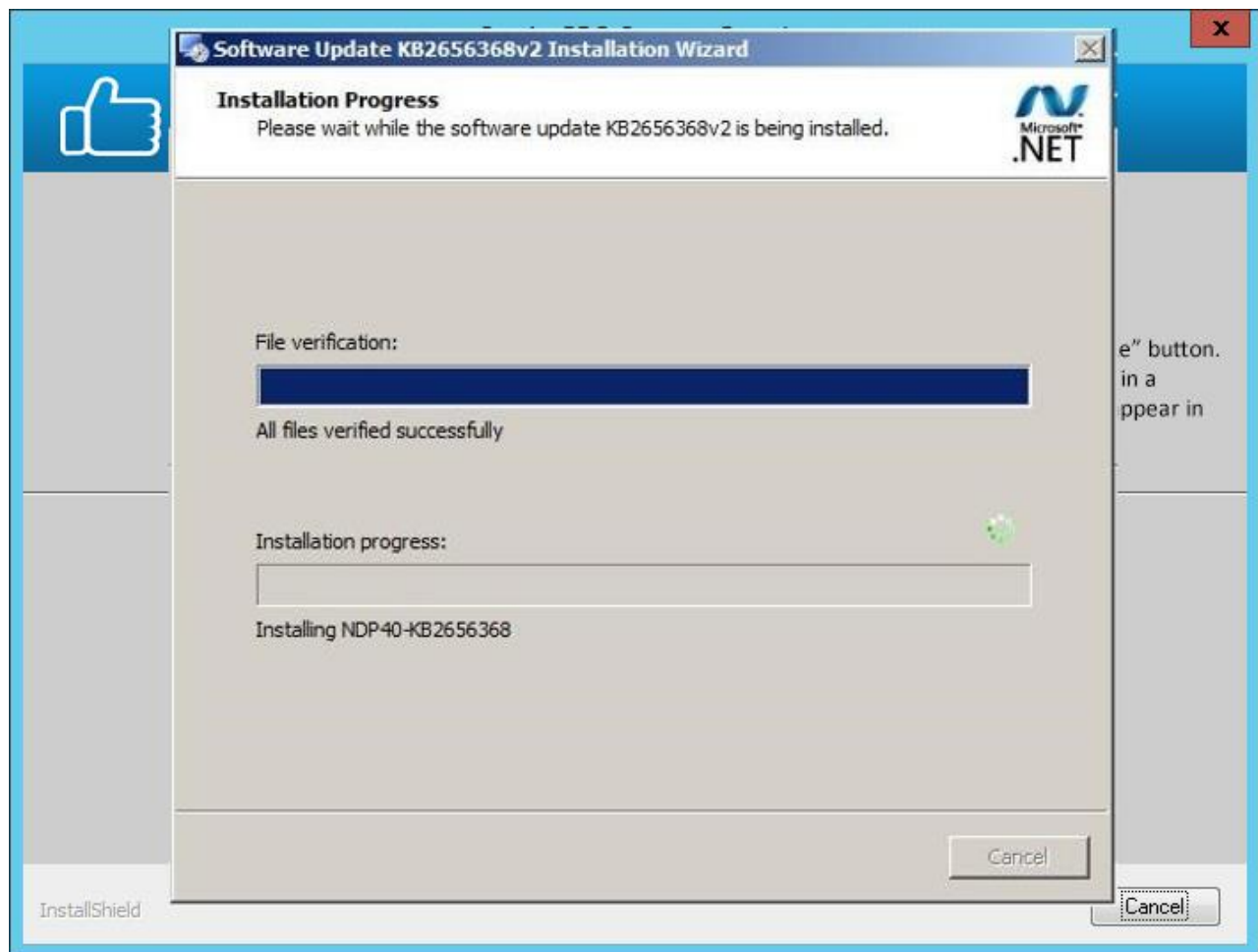
ServicePRO is now a web browser application. This installation provides you with the browser application.

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

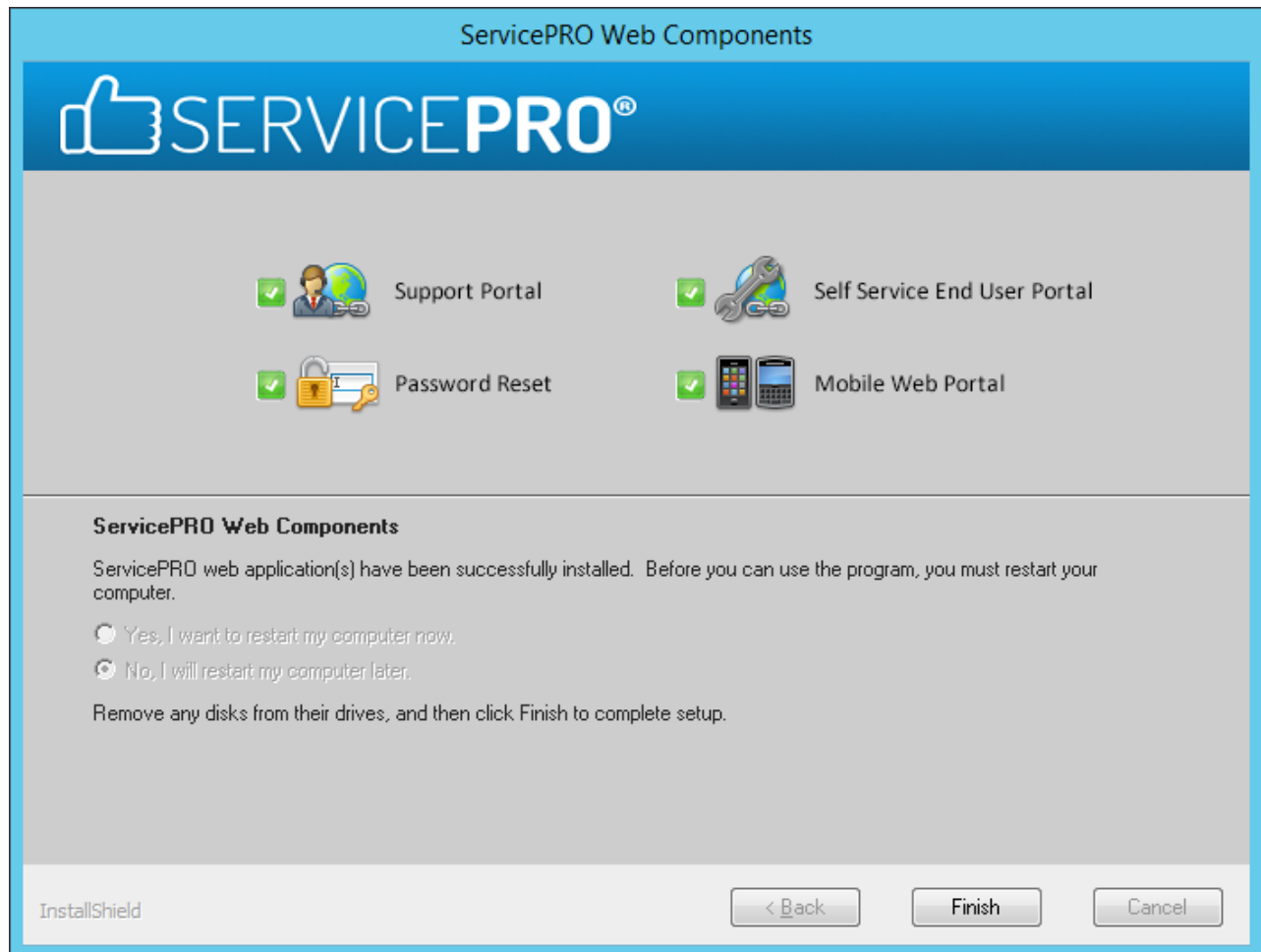




**Note:** Hotfixes for .Net 4.0 may be installed during the setup

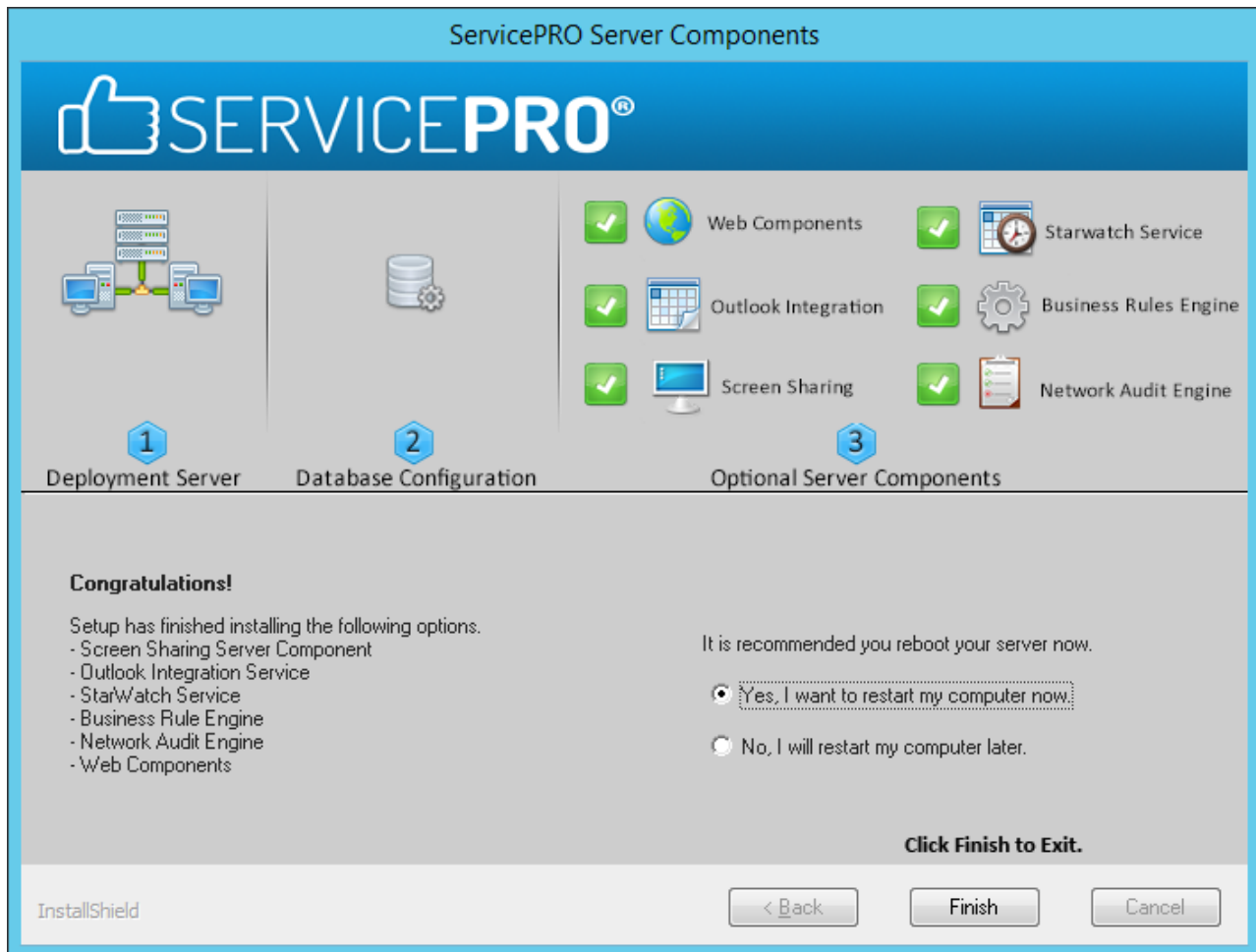


3. Upon the completion of the component installations, a final confirmation will be shown.



## Part 9 – ServicePRO Server Components Installation Completion

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



## 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:

Configure Active Directory Synchronization

Import Settings | Field Mapping | Schedule/Import Now

Domain Type

Trusted Domains (LDAP)

Forest (Global Catalog)

Authentication for Choreograf

HelpSTAR and AD

HelpSTAR only

AD only

Authentication for End User Portal

HelpSTAR and AD

HelpSTAR only

AD only

Import Users from following Active Directory Groups/Units

Name	Type	Select OU	Select Teams
▶ All Users in Your Current Domain			

Edit Remove Advanced

Default OU  
Default HelpSTAR OU when ADS department is empty : Administration

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

Domain Type

Trusted Domains (LDAP)

Forest (Global Catalog)

3. 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.

Authentication for Choreograf

HelpSTAR and AD

HelpSTAR only

AD only

Authentication for End User Portal

HelpSTAR and AD

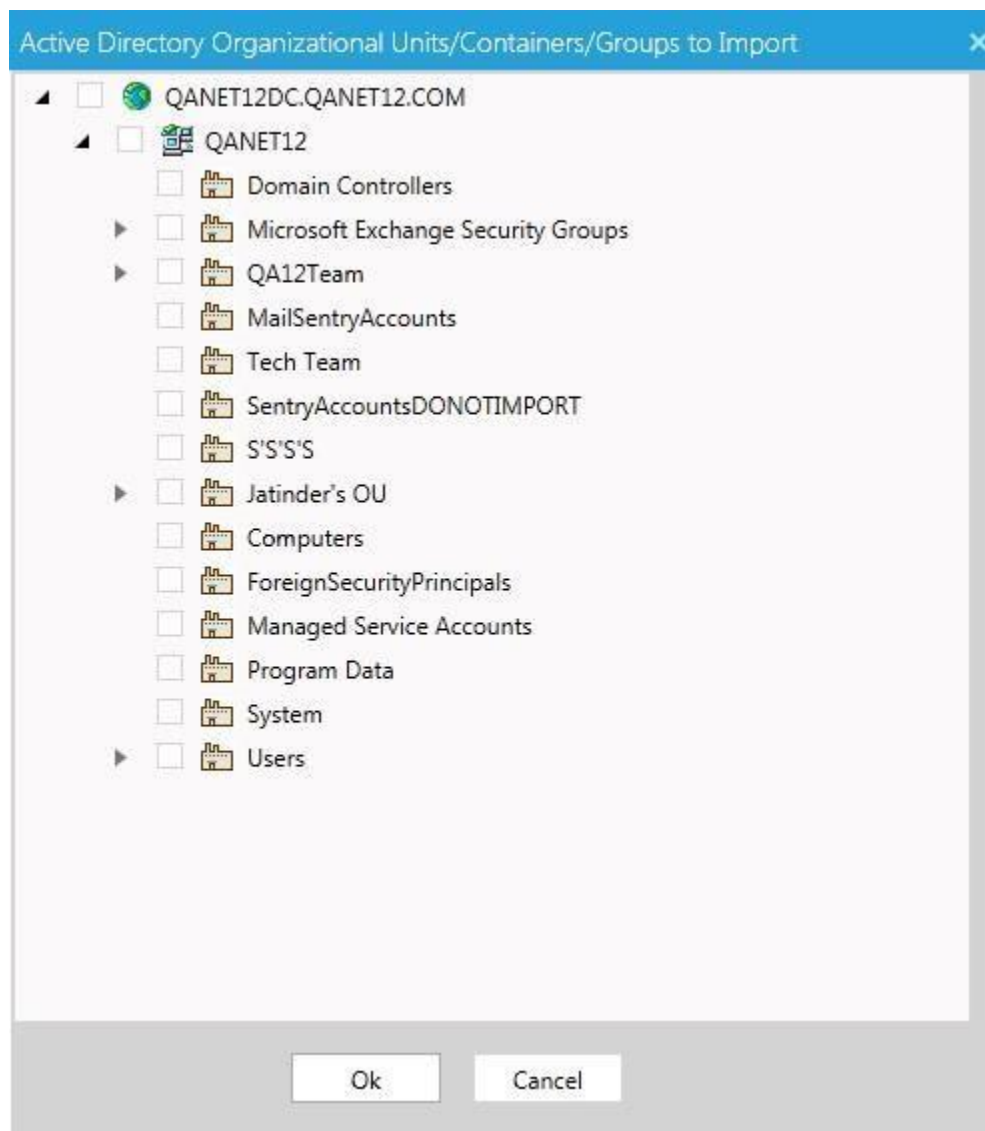
HelpSTAR only

AD only



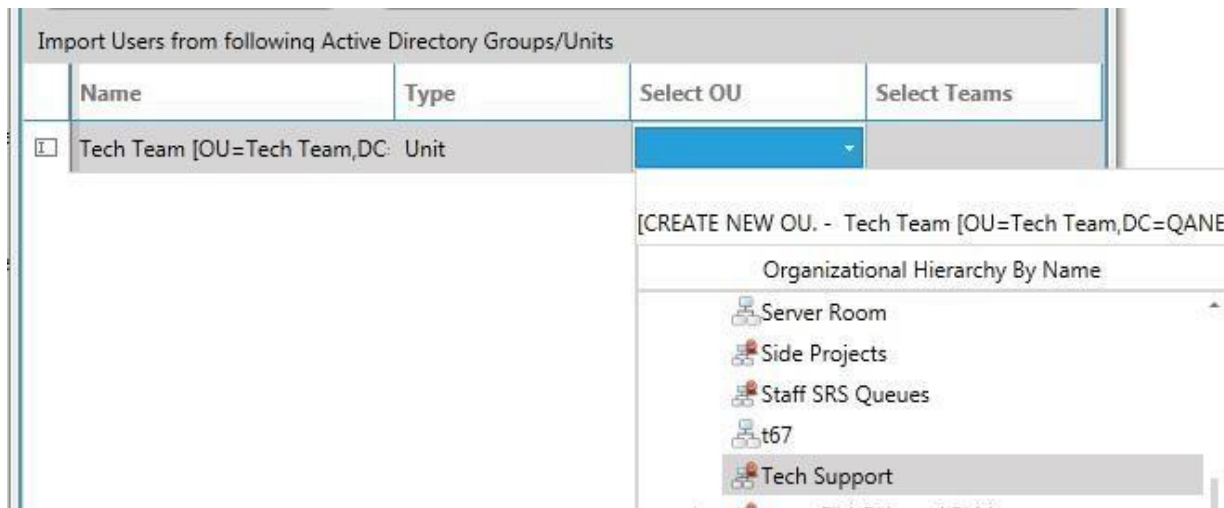
4. To import from specific Organizational Units or Groups in Active Directory and import users to Teams based on their Organizational Unit, perform the following:

- 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.



- 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)

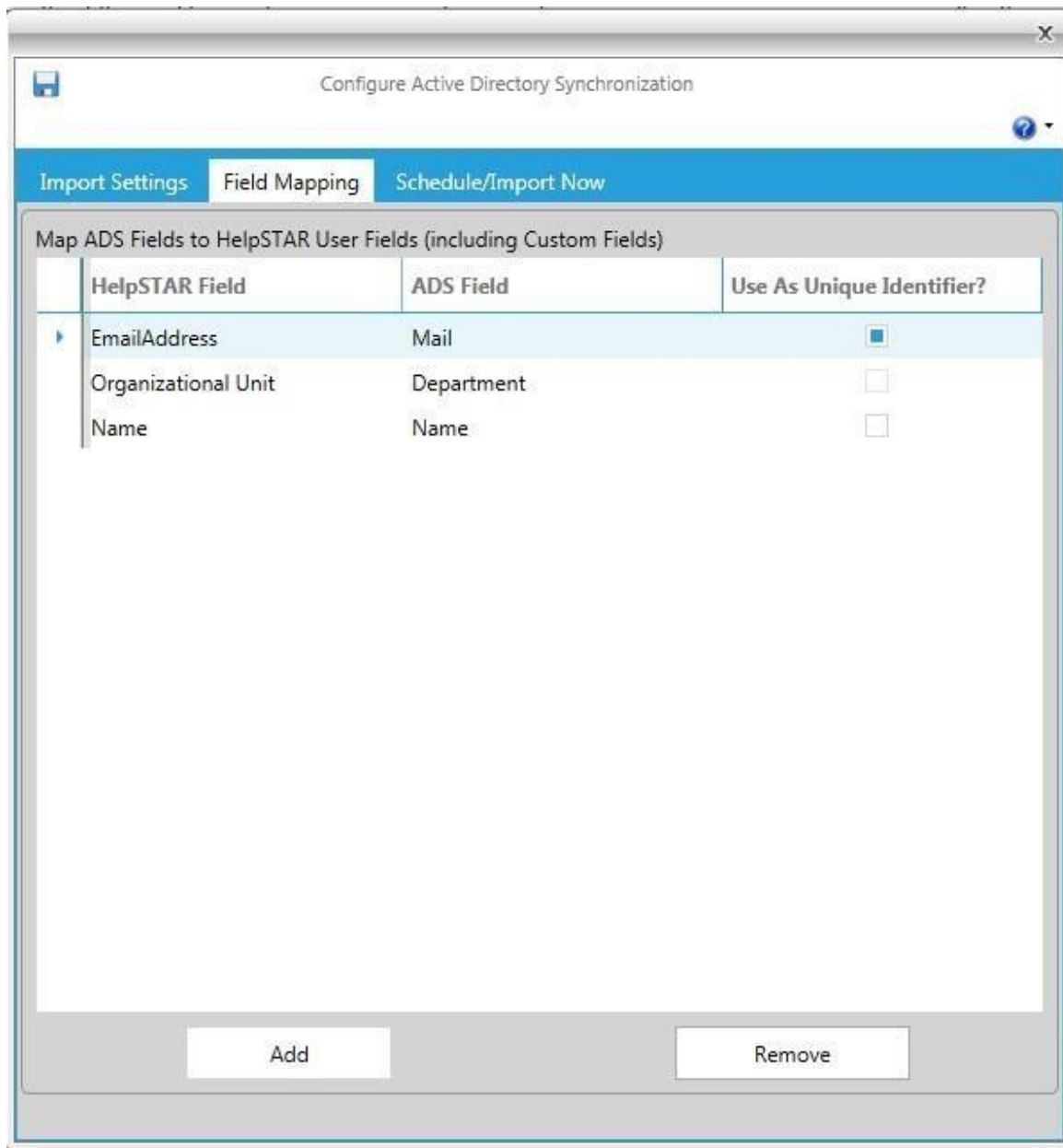
- b. Select a previously added Team in ServicePRO



### 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:

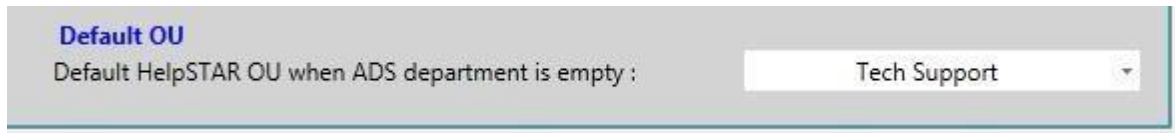


- Click on Add button in the “Map ADS fields to ServicePRO User Fields” section. The following prompt will appear:



- 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.

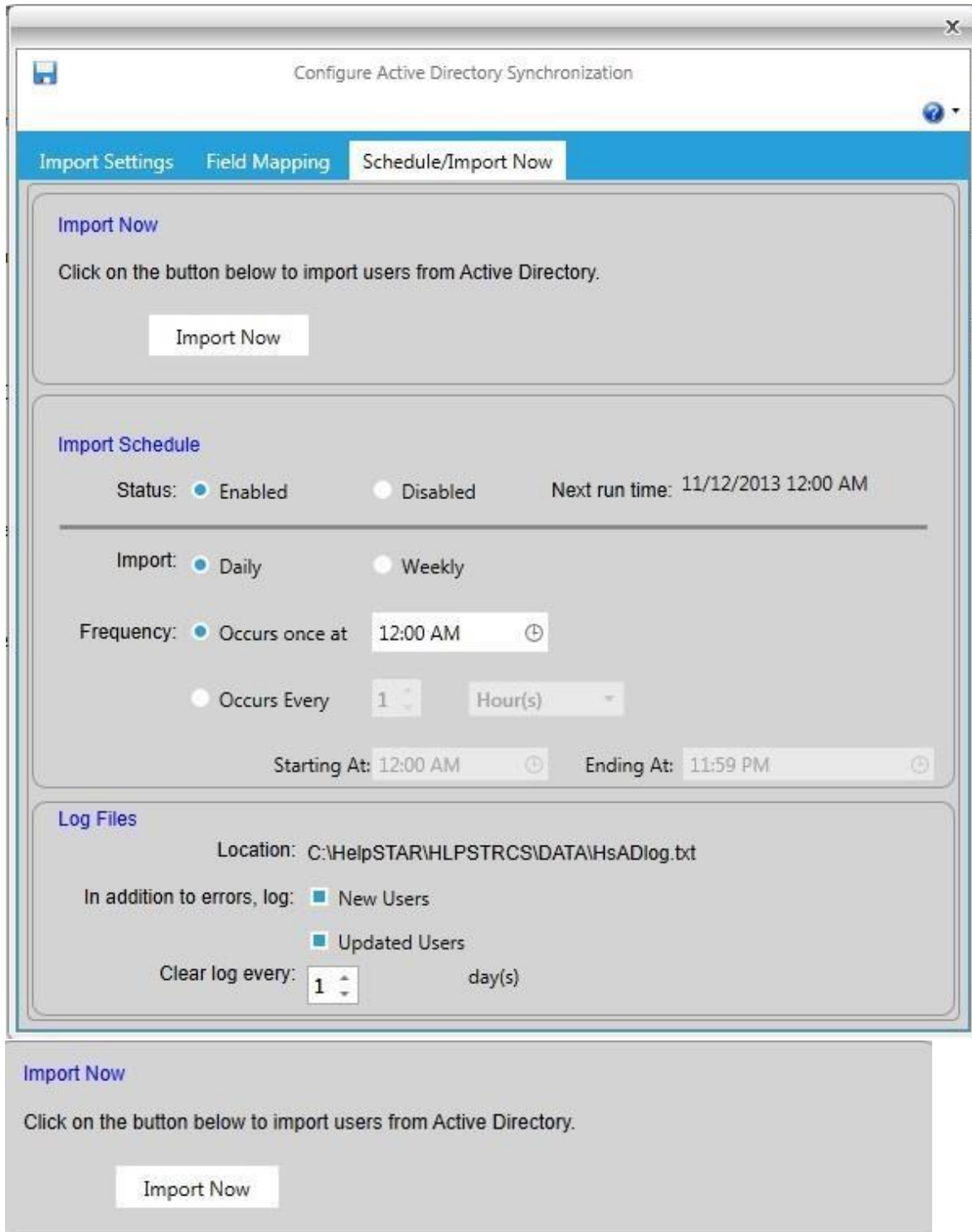
A screenshot of a software configuration window titled "Default OU". The window has a light gray background and a thin blue border. It contains the text "Default HelpSTAR OU when ADS department is empty :" followed by a white dropdown menu box with a small downward arrow on the right. The dropdown menu currently displays "Tech Support".

**Default OU**  
Default HelpSTAR OU when ADS department is empty :

## 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:



Configure Active Directory Synchronization

Import Settings Field Mapping **Schedule/Import Now**

**Import Now**

Click on the button below to import users from Active Directory.

Import Now

**Import Schedule**

Status:  Enabled  Disabled Next run time: 11/12/2013 12:00 AM

---

Import:  Daily  Weekly

Frequency:  Occurs once at 12:00 AM  Occurs Every 1 Hour(s)

Starting At: 12:00 AM Ending At: 11:59 PM

**Log Files**

Location: C:\HelpSTAR\HLPSTRCS\DATA\HsADlog.txt

In addition to errors, log:  New Users  Updated Users

Clear log every: 1 day(s)

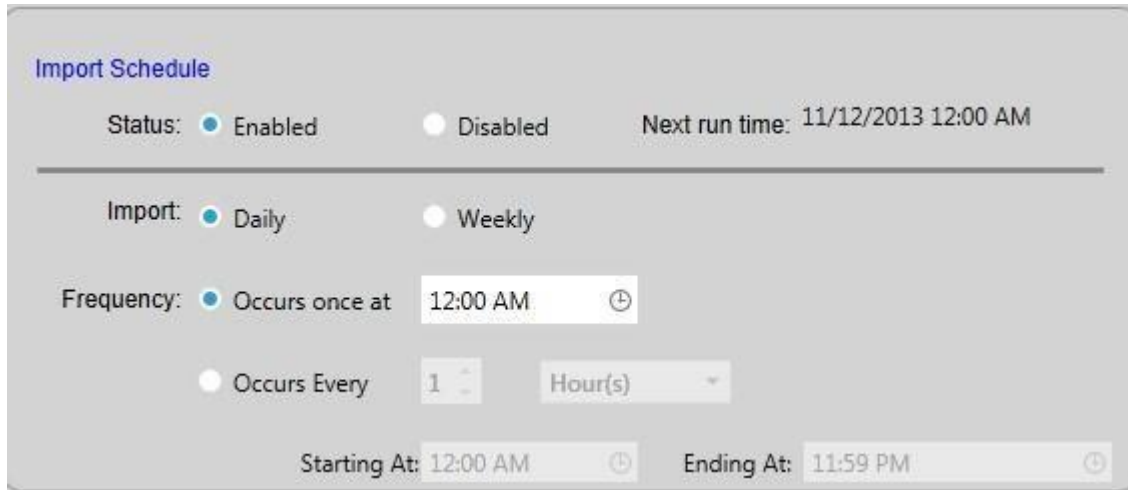
**Import Now**

Click on the button below to import users from Active Directory.

Import 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:



## 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**.



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, [itsupport@yourorganization.com](mailto:itsupport@yourorganization.com), 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:

Configure System Email Accounts

System Email Accounts

Home

New Update Delete Save Close

Manage Actions

**System Account Monitoring Status**

Enabled  Disabled

Current Status : Running

Next Run Time : 11/11/2013 3:12 PM

**Settings**

Scan for new mail every : 1 minutes

Issue Alert if unable to process mail

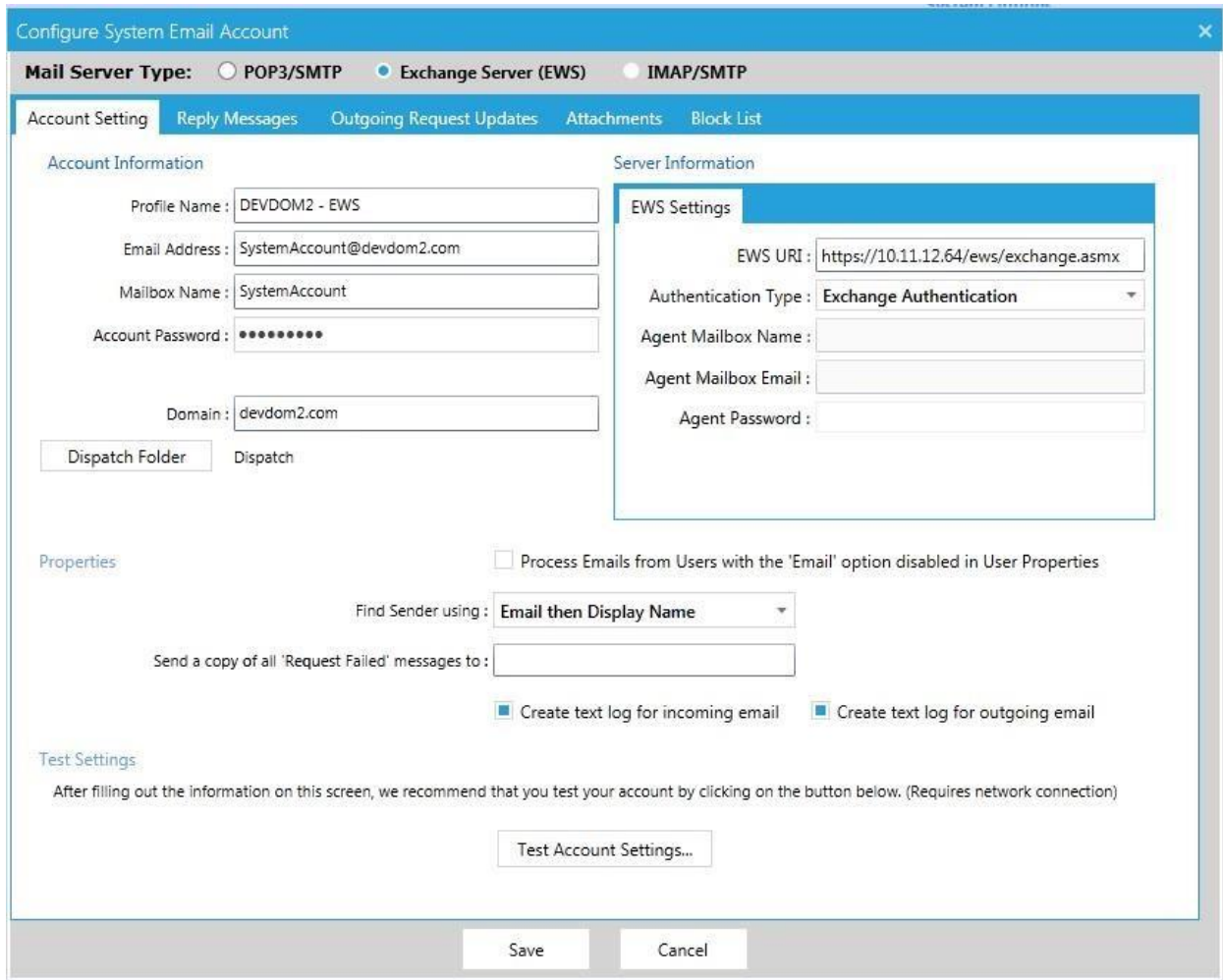
Create announcement if invalid email terminates processing

**Profiles**

Active	Default	Profile Name	Type	Server(s)	Email Address
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	swservice	EWS	https://10.11.12.26/ews/exchang	swservice@qanet3.com
<input checked="" type="checkbox"/>	<input type="radio"/>	swsvr1 POP3	POP3/SMTP	SMTP: 10.11.12.26 POP: 10.11.12.26	swsvr1@qanet3.com
<input type="checkbox"/>	<input type="radio"/>	swews1	EWS	https://10.11.12.190/ews/exchan	swews1@qanet12.com

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





Configure System Email Account

Mail Server Type:  POP3/SMTP  Exchange Server (EWS)  IMAP/SMTP

Account Setting | Reply Messages | Outgoing Request Updates | Attachments | Block List

Account Information

Profile Name:

Email Address:

Mailbox Name:

Account Password:

Domain:

Dispatch Folder:  Dispatch

Server Information

EWS Settings

EWS URI:

Authentication Type:

Agent Mailbox Name:

Agent Mailbox Email:

Agent Password:

Properties

Process Emails from Users with the 'Email' option disabled in User Properties

Find Sender using:

Send a copy of all 'Request Failed' messages to:

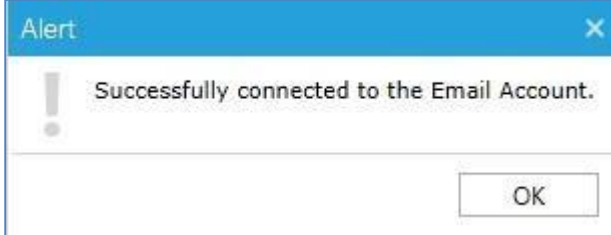
Create text log for incoming email  Create text log for outgoing email

Test Settings

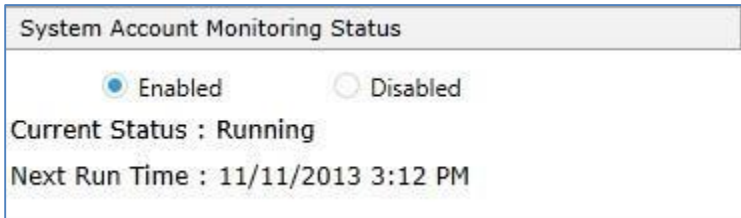
After filling out the information on this screen, we recommend that you test your account by clicking on the button below. (Requires network connection)

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.

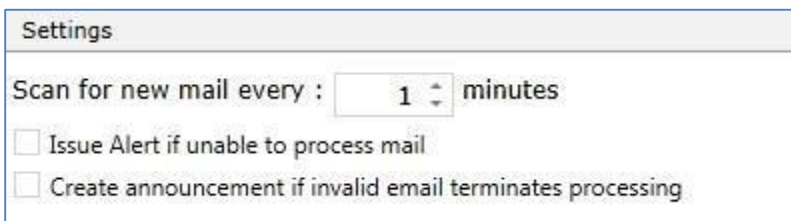
9. In the Properties section, the following options are available:
10. Option to process emails from users that have email disabled in their user properties.
11. Find user options - link an email to a service request via email address, then display name or vice versa.
12. If you want a copy of failed 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".



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.



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

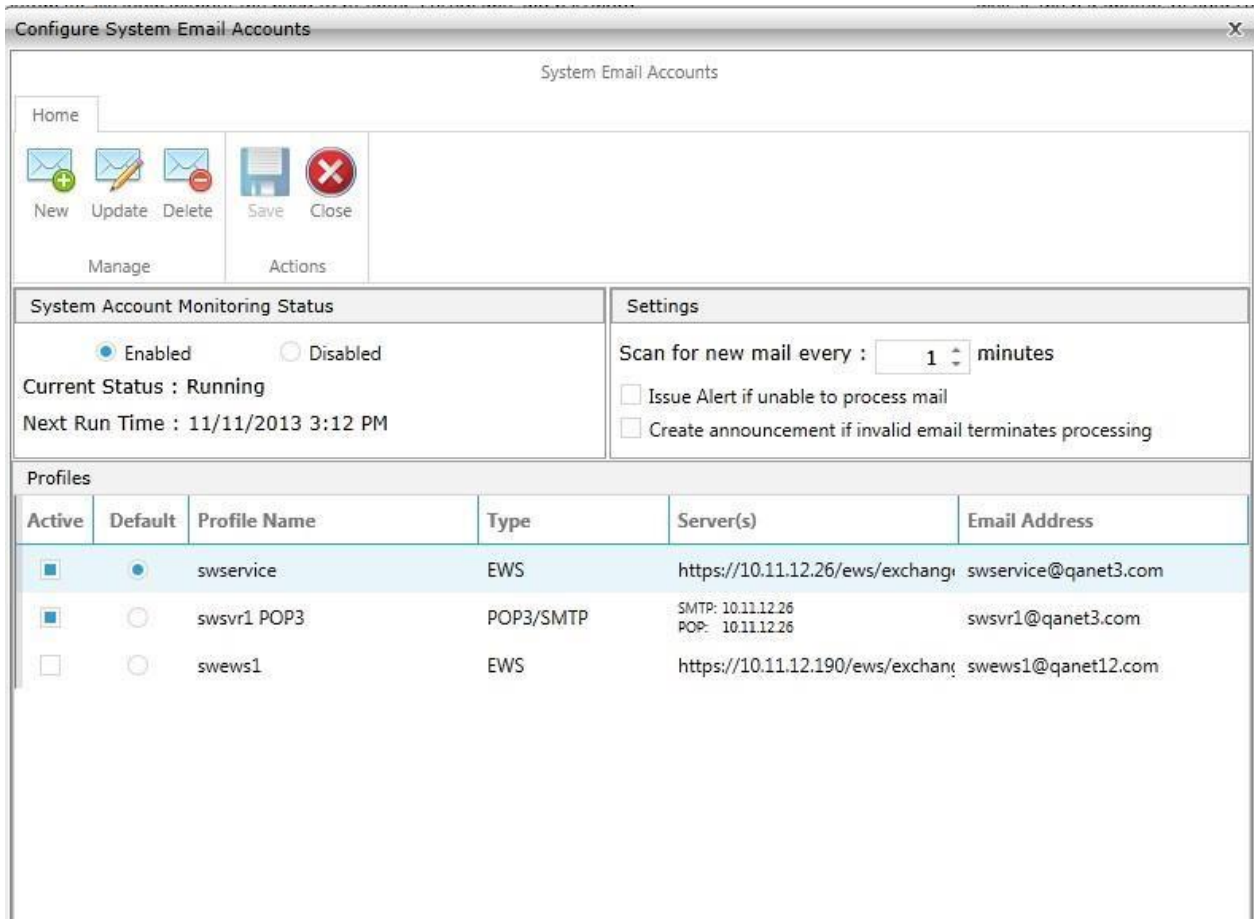


18. Click on Finish to save settings.
19. Return to your Services console and start the ServicePRO StarWatch Service.

### 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:



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

Configure System Email Account

Mail Server Type:  POP3/SMTP  Exchange Server (EWS)  IMAP/SMTP

Account Setting Reply Messages Outgoing Request Updates Attachments Block List

Account Information

Display Name: swwsvr1 POP3

Email Address: swwsvr1@qanet3.com

Mail Account Name: swwsvr1

Account Password: ●●●●●●●●

Logon Using Email Address

Domain: qanet3.com

Dispatch Folder System Dispatch

Server Information

POP3 Settings SMTP Settings

POP3 Server: 10.11.12.26

POP3 Port: 110

Require logon using Secure Password A

POP3 Server requires authentication

Enable SSL over POP3

Properties

Process Emails from Users with the 'Email' option disabled in User Properties

Find Sender using: Email then Display Name

Send a copy of all 'Request Failed' messages to:

Create text log for incoming email  Create text log for outgoing email

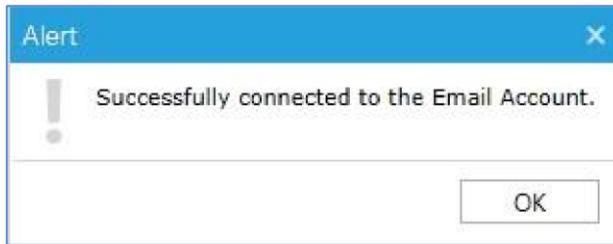
Test Settings

After filling out the information on this screen, we recommend that you test your account by clicking on the button below. (Requires network connection)

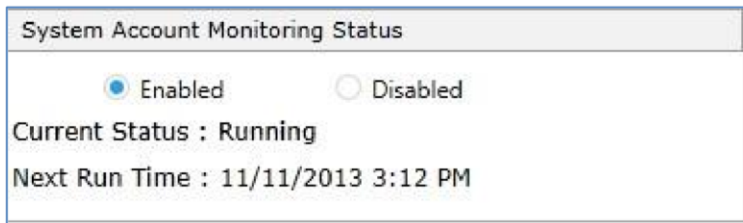
Test Account Settings...

Save Cancel

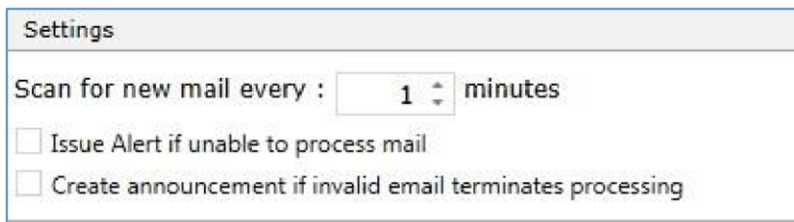
5. Select the POP3/SMTP option in the Mail Server Type section.
6. In the Account Information section, enter the settings for the mail account.
7. Using the Dispatch Folder button, select a default location for requests submitted to this email address.
8. In the Server Information section, enter in the 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".



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.



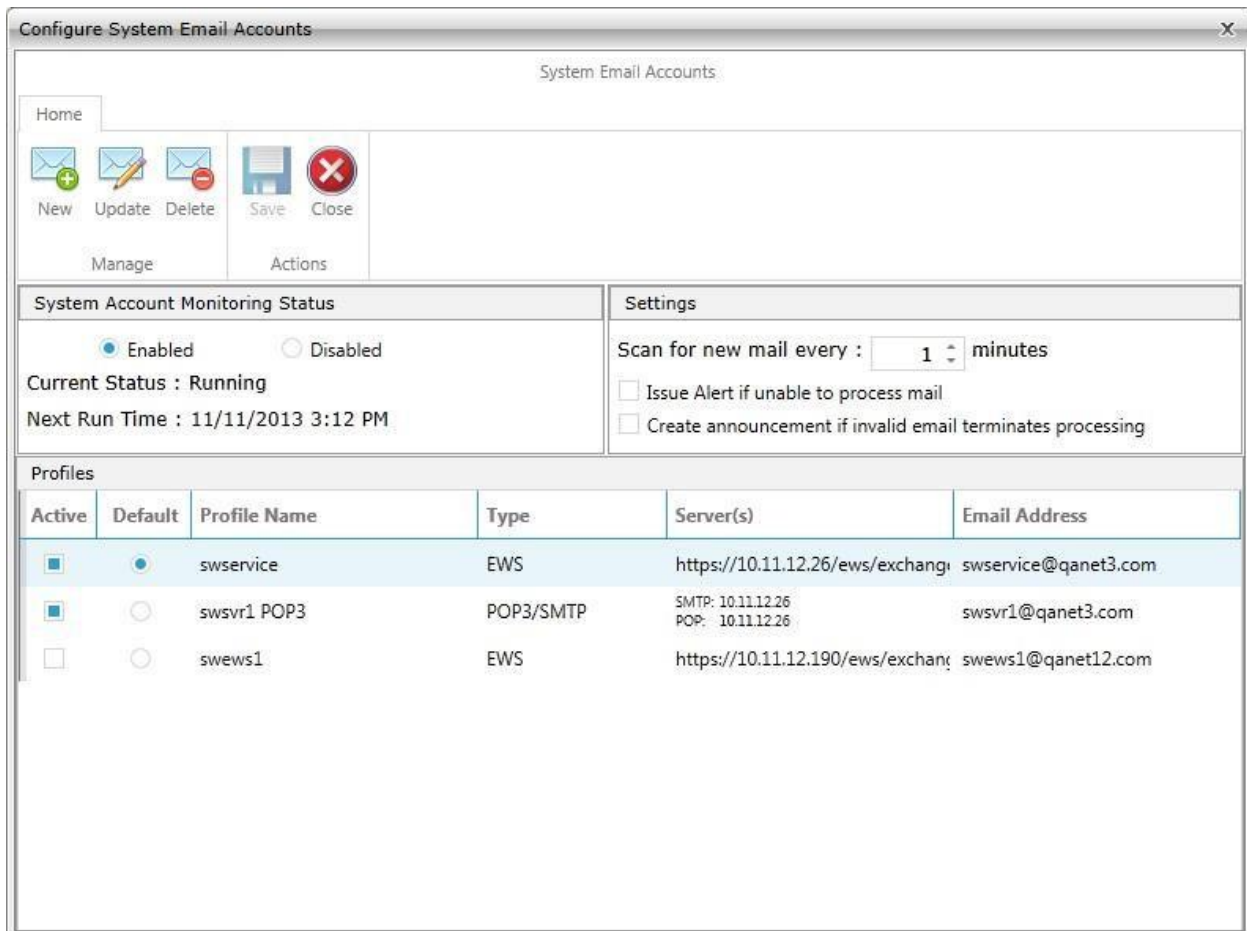
17. In the “Scanning Interval & Alert” section, specify the time interval in which System Email should scan for incoming emails.



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:



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

Configure System Email Account

Mail Server Type:  POP3/SMTP  Exchange Server (EWS)  IMAP/SMTP

Account Setting Reply Messages Outgoing Request Updates Attachments Block List

Account Information

Display Name: swserviceSMTP

Email Address: swservice@qanet3.com

Mail Account Name: swservice

Account Password: ●●●●●●●●

Logon Using Email Address

Domain: qanet3.com

Dispatch Folder Tech Dispatch

Server Information

IMAP Settings SMTP Settings

IMAP Server: 10.11.12.26

IMAP Port: 143

Require logon using Secure Password A

IMAP Server requires authentication

Enable SSL over IMAP

Properties

Process Emails from Users with the 'Email' option disabled in User Properties

Find Sender using: Email then Display Name

Send a copy of all 'Request Failed' messages to:

Create text log for incoming email  Create text log for outgoing email

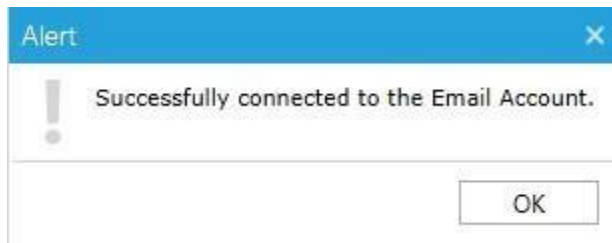
Test Settings

After filling out the information on this screen, we recommend that you test your account by clicking on the button below. (Requires network connection)

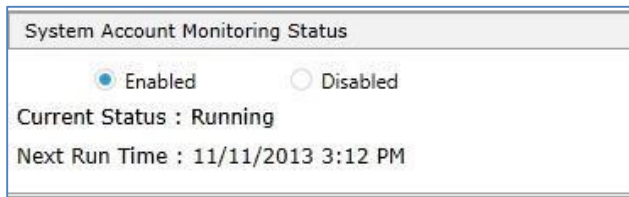
Test Account Settings...

Save Cancel

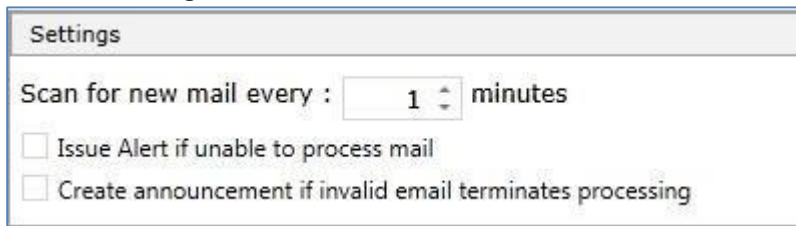
5. Select the IMAP/SMTP option in the Mail Server Type section.
6. In the Account Information section, enter the settings for the mail account.
7. In the Server Information section, enter in the details for the mail server. If your mail server employs SSL authentication, check the Enable SSL option when 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.
15. In the “System Account Monitoring Status” section, check Enable to start System Email.



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



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>