Polar Help Desk Installation Guide

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Introduction

Installation Files

Polar Help Desk installation files are the following:

- Setup.exe
- Setup.ini
- PolarHelpDesk.msi

To begin installation run Setup.exe.

Installation Process

Polar Help Desk installation process includes following actions:

- Installs application files on the server computer.
- Creates PolarHelpDesk database on the database server and initializes it with the necessary data. Sets default database user for the application.
- Creates virtual directory for the application on the web server. Changes virtual directory settings in order to improve performances.

Preparing For Installation

Hardware Requirements

Hardware requirements for the server computer:

- CPU speed: 800 MHz (minimum)
- Available memory: 256 MB (512 recommended)
- Available disk space: 50 MB

Software Requirements

Operating systems for the server computer:

- Windows 2000 Professional
- Windows 2000 Server
- Windows 2003 Enterprise
- Windows XP Professional

Software requirements for the server computer:

- Internet Information Services 5.0 or 6.0
- Microsoft .NET Framework 1.1
- Microsoft SQL Server 2000 or MSDE
- Microsoft SQL Server 2000 or MSDE Service Pack 3

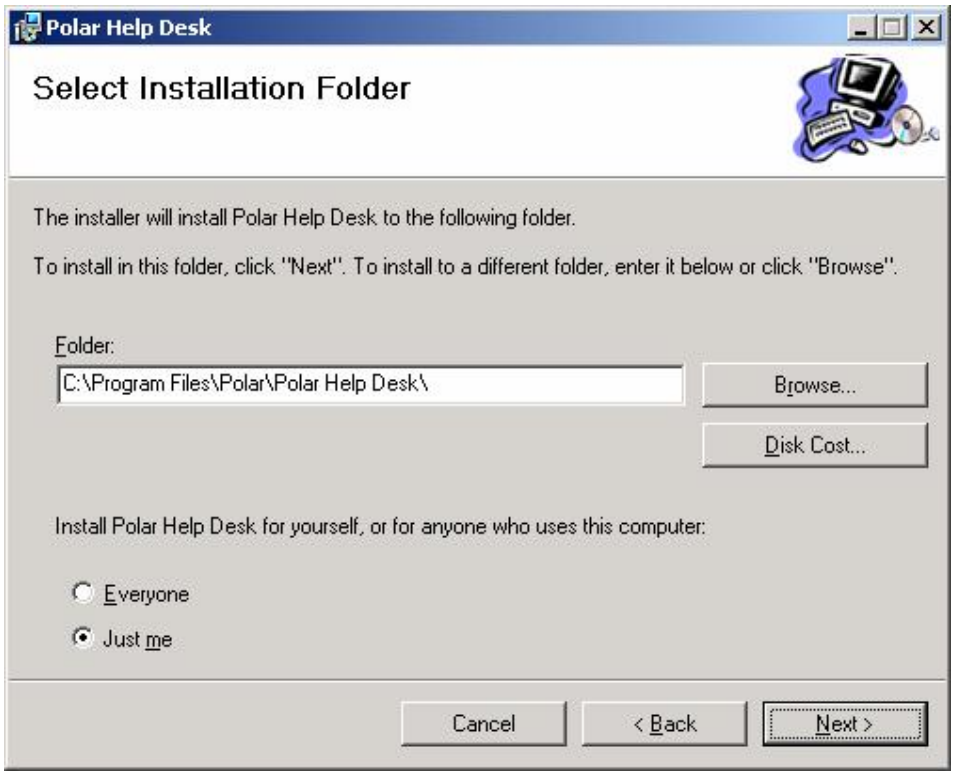
Software requirements for the client computer:

- Internet Explorer 6
- Internet Explorer 6 Service Pack 1

Installing Polar Help Desk

Starting Polar Help Desk Installation

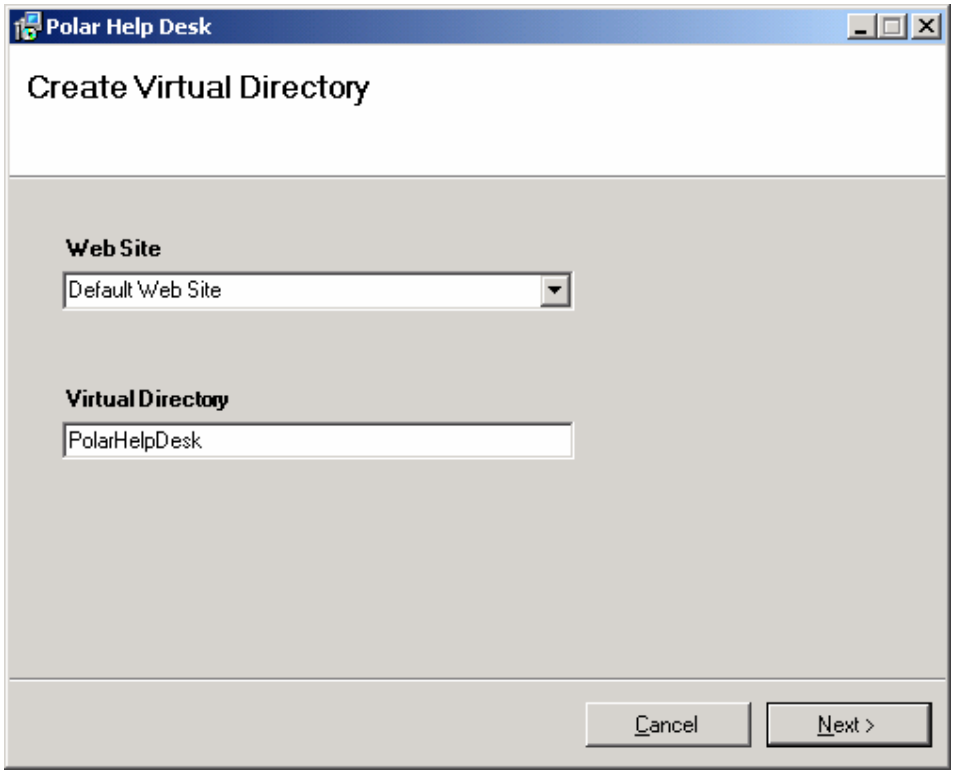
To start Polar Help Desk installation start Setup.exe. Choose a folder on the disk to install Polar Help Desk.



Web Server Settings

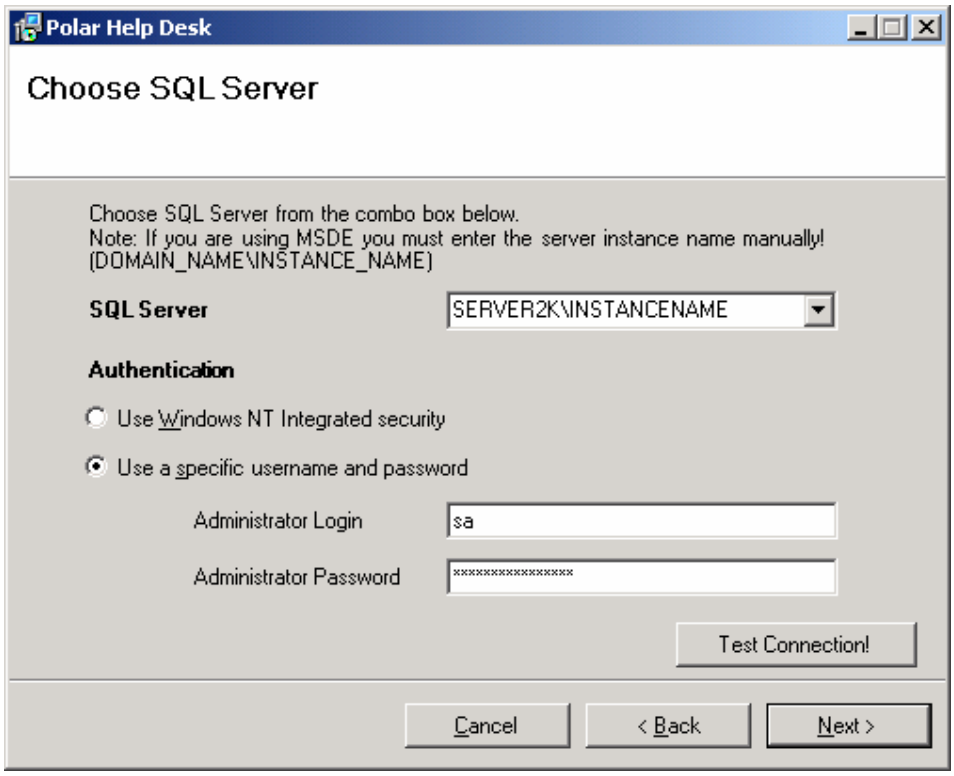
In this form you must choose the following settings for the Polar Help Desk:

- web site,
- virtual directory name for the application. The virtual directory is created on the chosen web site.

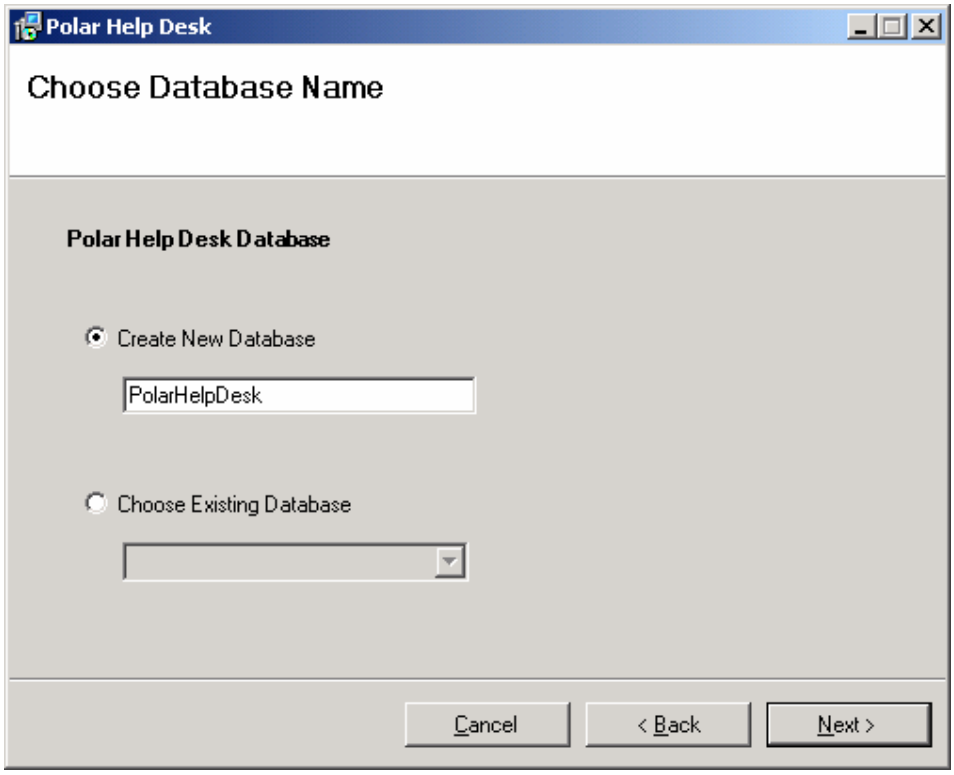


Database Server Settings

On this form you have to choose a SQL server to install Polar Help Desk to. You must also provide a security credentials in order for the installation to be able to access the database and to run necessary scripts.

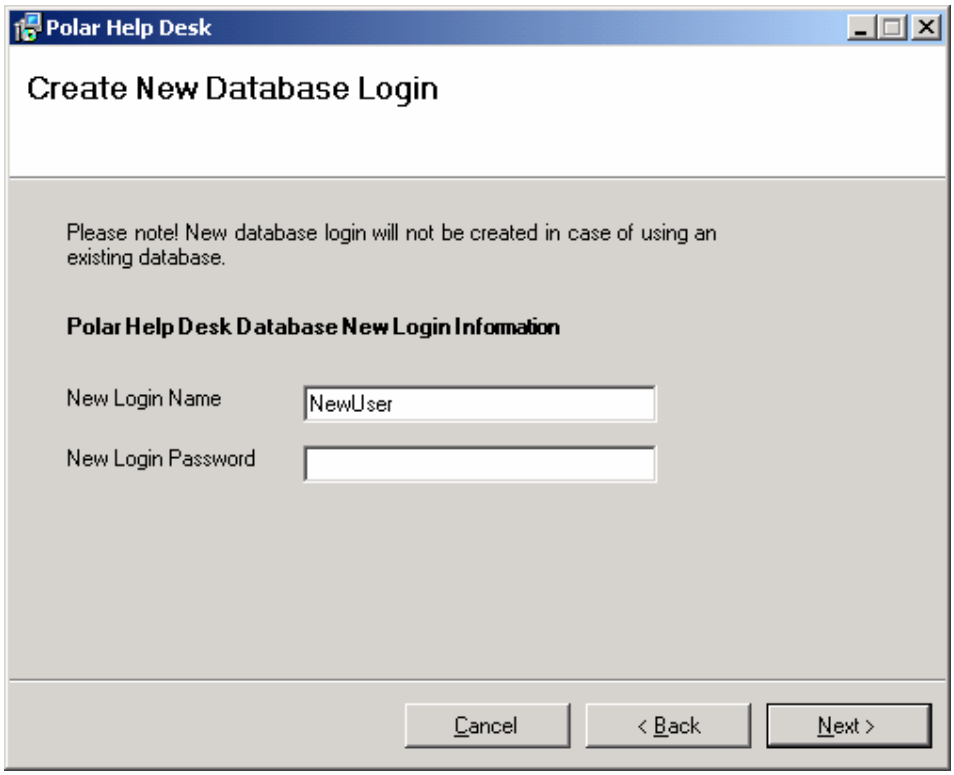


On this form you have to choose a database name for the Polar Help Desk database. If you want to use an existing database, click the “Choose Existing Database” and than choose the database.



On this form you have to choose the new login for Polar Help Desk database name and password.

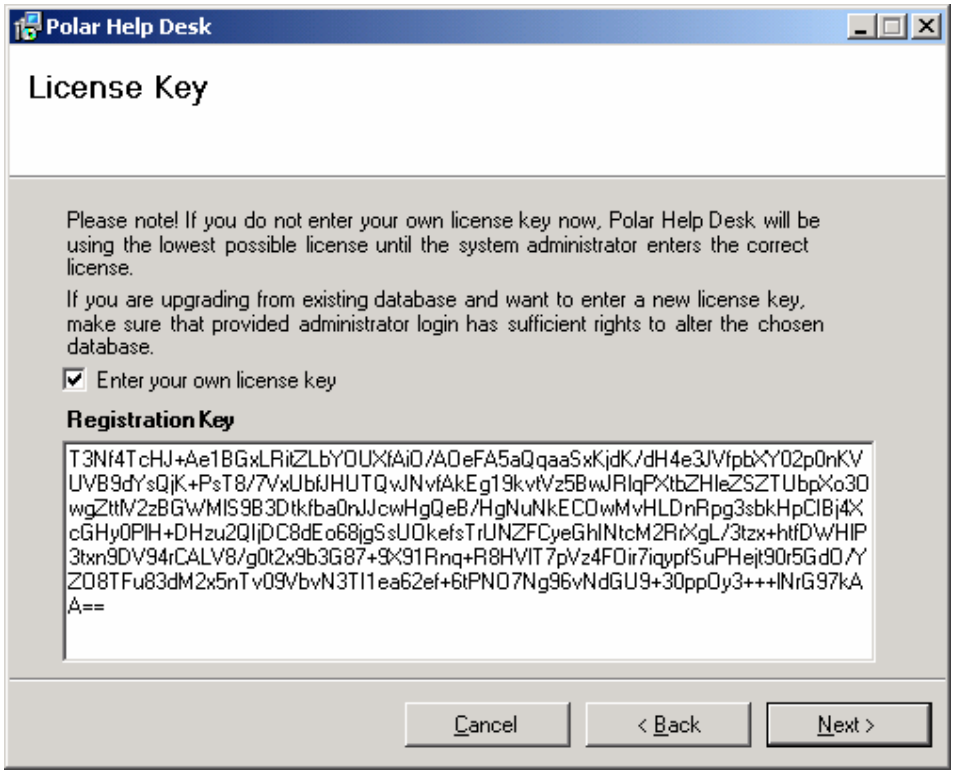
Please note! New database login will not be created in case of using an existing database or if the supplied login name already exists.



Entering License Key

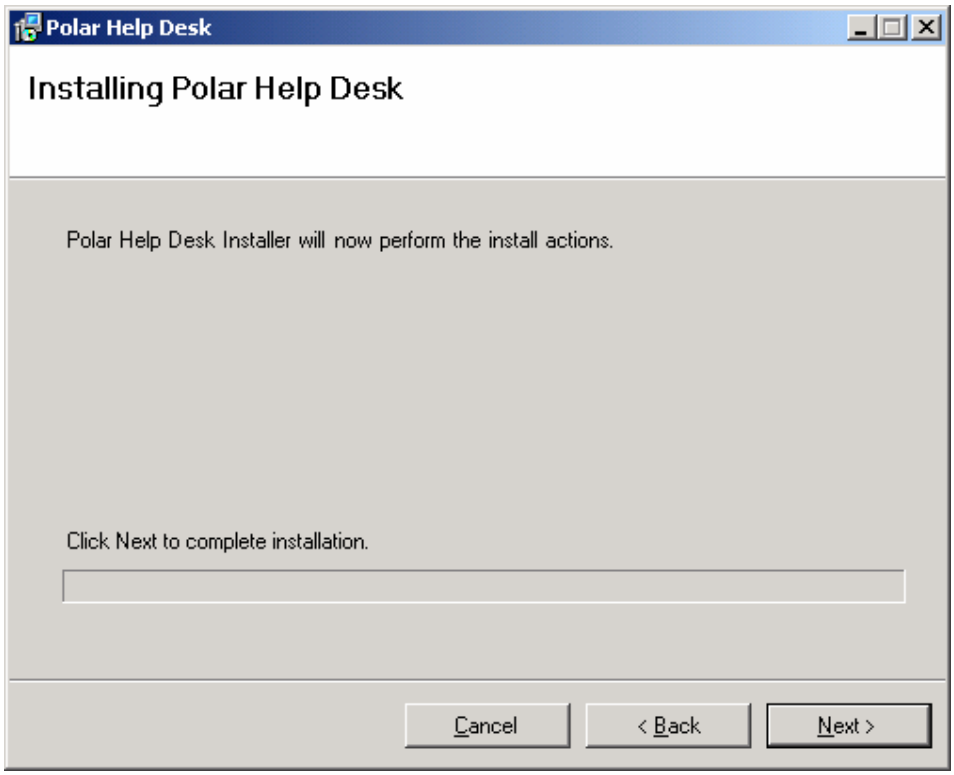
On this form you have to enter your license key.

Please note! If you do not enter your own license key now, Polar Help Desk will be using the lowest possible license until the system administrator enters the correct license.

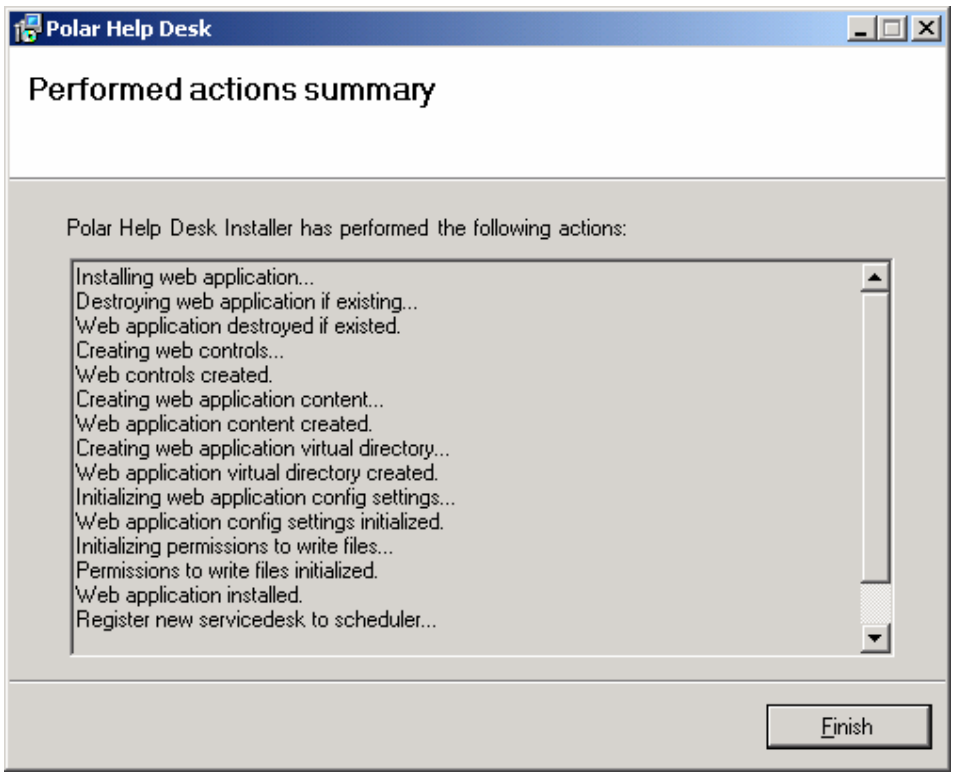


Finishing Installation

On this form click Next to complete the installation with settings you have chosen on the previous forms.



On this form you can see a list of the actions performed during installation.



Starting Polar Help Desk

To start Polar Help Desk, open a browser and type the URL to the Polar Help Desk on your web server:

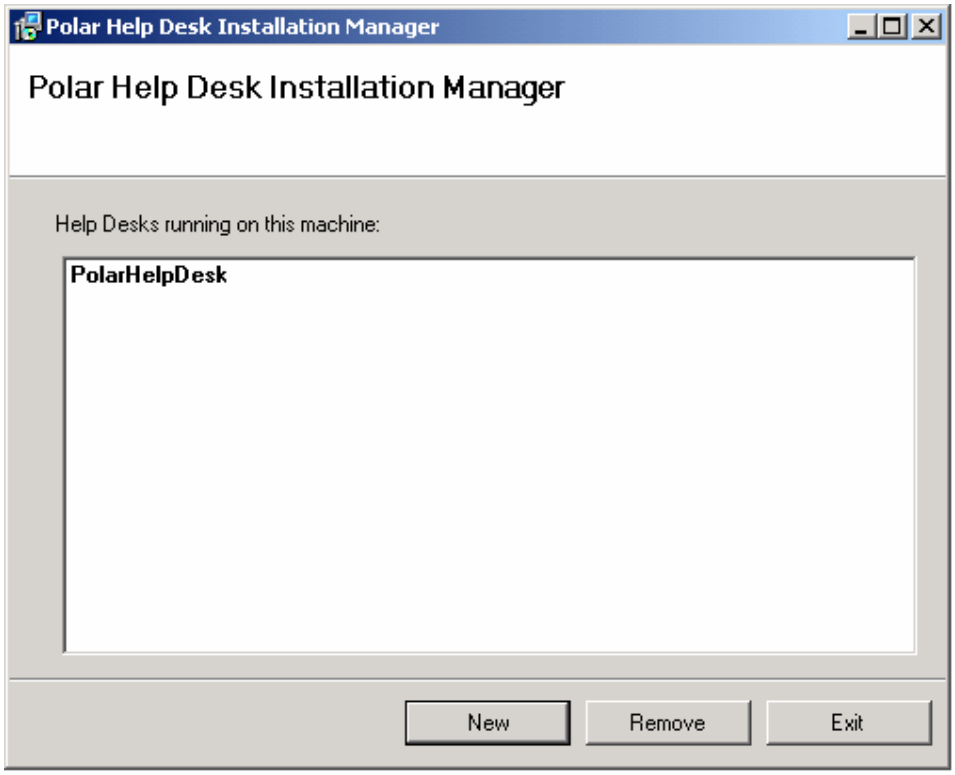
http://<Server_IP>:<Web_Site_Port_Number>/<Virtual_Directory_Name>/default.aspx

For example, to access Polar Help Desk from the server computer, open the browser and type (this is only valid if you have left the default settings in the installation):

http://localhost/PolarHelpDesk/default.aspx

Adding New Polar Help Desk Instances

Go to the Polar Help Desk installation folder on your disk (by default c:\Program Files\Polar\Polar Help Desk) and start the InstallationManager.exe. The following form appears:



You can see that the instance of the Polar Help Desk called PolarHelpDesk is already on the list.
To add a new instance, click New and the install procedure will be started all over again.
To remove the existing instance, mark the instance and click Remove. The uninstall procedure will be started.

You can add as many Polar Help Desk instances as you like. They all function independently as long as you do not allow them to share a database. You can easily avoid this by setting different names to all the instances.

Removing Polar Help Desk

To remove Polar Help Desk go to Control Panel – Add/Remove Programs and remove Polar Help Desk.

Caution! When you remove Polar Help Desk, all instances will be removed. However, the SQL databases containing your data will not be deleted.

How to…

Install Polar Help Desk using MSDE

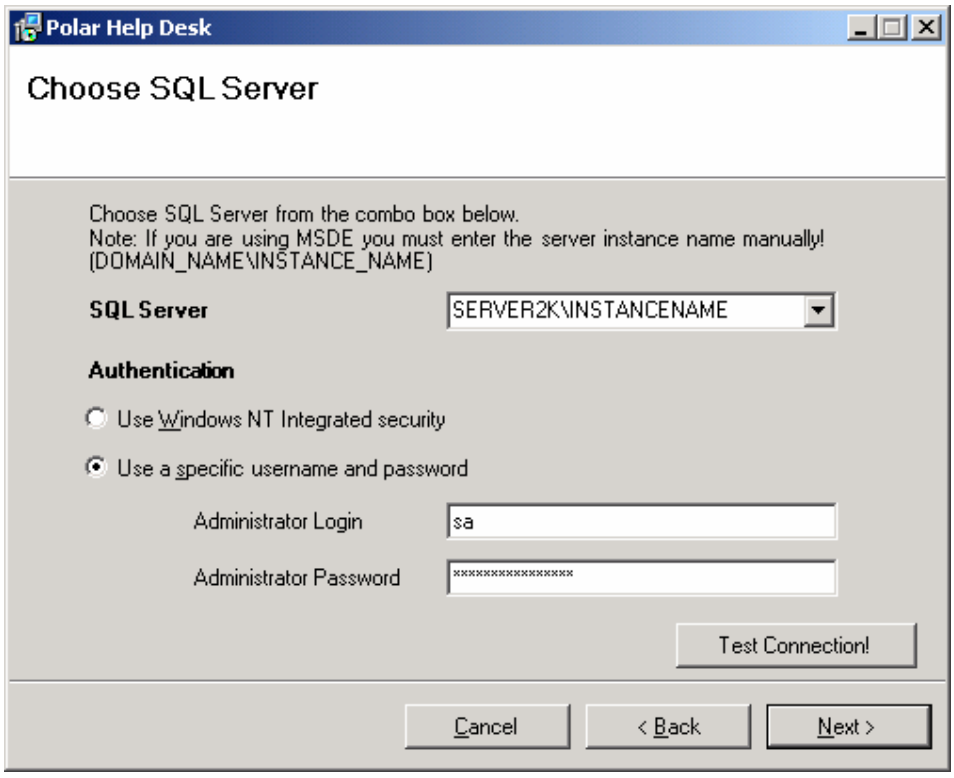
Read Microsoft MSDE documentation in order to install SQL server instance correctly. The documentation is available as “ReadmeMSDE2000A.htm” in the MSDE installation folder or here http://download.microsoft.com/download/d/5/4/d5402c33-65de-4464-9d82-d1de2971d9db/ReadmeMSDE2000A.htm .

Example: create new SQL server instance using this command:
setup INSTANCENAME="NewInstance" SECURITYMODE=SQL SAPWD="AStrongSAPwd"

That will provide you with the SQL server instance with these attributes:

Server instance name:	SERVER2K\NEWINSTANCE
Security mode:	Mixed Mode
Admin account password:	AStrongSAPwd (username for admin account: sa)

Use this data in “**Choose SQL Server**” form. MSDE server instances **will not be listed** in the combo box and you must enter it manually!



Create Polar Help Desk Database Manually

To install PolarHelpDesk database manually you have to perform the following actions:

1. Go to the [TARGETDIR]\Setup\Database\SQLScripts\ folder on your web server. (The default for [TARGETDIR]: c:\ProgramFiles\Polar\Polar Help Desk)

2. Open the MS SQL Query Analyser or other tool to connect to your database server.

3. Create PolarHelpDesk database.

4. Run the following scripts form the [TARGETDIR]\Setup\Database\SQLScripts\ (be careful to choose the correct database form the drop down box or just add string "using PolarHelpDesk" on the beginning of every sql script you run):
    a. PolarServiceDesk_Database_CreateObjects.sql
    b. PolarServiceDesk_Database_Initialize.sql

    You have to run the scripts in that particular order.

5. Add the database owner you will later use in the Web.config file (see chapter "Configure Polar Help Desk Instance Using Existing SQL Database"), making him a PolarHelpDesk database owner.

6. Modify the Web.config file accordingly. (See chapter "Configure Polar Help Desk Instance Using Existing SQL Database".)

Configure Polar Help Desk Instance Using Existing SQL Database

If you have Polar Help Desk database already installed on the local or remote machine and you want your Polar Help Desk use that particular database do the following actions (If your database has different name than "PolarHelpDesk" change it accordingly):

1. Open [TARGETDIR]\PolarHelpDesk**Web.config** file (the default for [TARGETDIR]: c:\ProgramFiles\Polar\Polar Help Desk) in notepad or some xml editor and find the tag:

<add key="connectionString" value="data source=localhost;Integrated Security=SSPI;database=PolarHelpDesk" />

2. You have to change the "connectionString" value to look like this:

<add key="connectionString" value="data source=SQL_SERVER_NAME;uid=DATABASE_OWNER_USERNAME;pwd=DATABASE_OWNER_PASSWORD;database=DATABASE_NAME" />

3. Example:

<add key="connectionString" value="data source=localhost;database=PolarHelpDesk;uid=sa;pwd=" />

4. Save the Web.config file.

5. Start Polar Help Desk instance in your browser. This should work if you enter proper credentials.

Install Polar Help Desk on a Hosted Server

Please note! By installing Polar Help Desk on a hosted server the following application features will be left out:

- Automatic Incident priority escalation (using Polar Service Desk Scheduler Service). The escalation can be forced manually.
- File automation (using Polar Service Desk Scheduler Service).
- Automatic incident opening by receiving emails (using Polar POP3 Component)
- Active Directory Authentication

To install Polar Help Desk on a hosted server follow these steps:

1. Install Polar Help Desk on you local machine to extract files and to upload them on the shared server.

2. Copy [TARGETDIR]\Setup\Application\webctrl_client folder into the root of your hosted web server Home directory root folder (www).

3. Copy [TARGETDIR]\Setup\Application\WebUI folder to your hosted server.

4. Rename WebUI folder to “HelpDesk” or use same other name you find suitable.

5. Consult your server manual and your web service provider in order to adjust .NET application settings.

6. Create new database on your hosted server. See chapter “Create Polar Help Desk Database manually”. For more details on how to set your DNS connection advanced options please consult your server manual and your web service provider.

7. Modify application connection string. See chapter “Configure Polar Help Desk Instance Using Existing SQL Database”.

8. Start Polar Help Desk through your browser