Richmond SupportDesk

Version 6.90

Upgrade Guide

March 2010

BEFORE UPGRADING...

...always back up your SupportDesk database

To discuss licensing, maintenance contracts, on-site upgrade support or general consultancy please contact your account manager or call 01428 641616 or email info@richmondsys.com.

For Technical Support and documentation please contact us or visit the Customer Zone.

support@richmondsys.com

01428 647333

www.richmondsys.com/customerzone

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1 Introduction

Welcome to the Richmond SupportDesk upgrade guide. This guide is provided to help with the upgrade of existing installations of Richmond SupportDesk main client, Web Interface, and Richmond SupportDesk extensions. It is strongly advised that this guide is read thoroughly prior to upgrading any of the Richmond SupportDesk components.

The Upgrade Guide assumes the following:

- That an existing installation exists including the Richmond SupportDesk Database.
- Access to appropriate credentials for the SQL server and the RichsSA user.

What is not covered in this Upgrade Guide:

- A new installation of the Richmond SupportDesk database.
- Details of SQL Server database backup.
- Upgrade details for Richmond SupportDesk versions earlier than 4.0

2 Important Upgrade Information for ALL Customers

Because of the significant changes in this release we are recommending the following additional actions for Customers running older versions of SupportDesk:

Version	Action
6.70	Uninstall the main client BEFORE upgrading
6.67 or older	Contact support BEFORE upgrading on 01428 647333 or email support@richmondsys.com
ALL VERSIONS	Read the Release Notes and consult the SupportDesk Upgrade Guide BEFORE upgrading

In this 6.90 release there are a number of brand new features relating to Configuration, Asset and Incident Management, and we have added and updated many help files. Please take the time to review the new features below and browse help files to get help on enabling them.

In the previous release (6.80) there was a substantial difference in the Email configuration compared to releases prior to 6.80. This included many new configuration settings for sending email and additional areas where text can be edited and formatted. If you are upgrading from a release prior to 6.80, when you upgrade, any new customisable text area will have pre-configured text, which you can edit. Any existing customisable text area will retain your existing text.

Some of the key configuration settings are listed towards the end of this document. This is not a comprehensive list of settings; please refer to the updated help files for more information.

Upgrade Steps

The main upgrade steps listed below gives a quick view of the required steps to complete the upgrade of Richmond SupportDesk Windows client, Web Interface and Extensions. Each point will be expanded upon as we work through this guide.

Main upgrade steps

- Close down all Richmond SupportDesk main clients.
- Stop all Extension services in use (i.e. Email Services, Escalation Service, Active Directory Synchronisation Service and Report Exporter Service)
- Backup the Richmond SupportDesk SQL database called RSUPDESK
- Backup the Web interface folder if you have made changes to the SSP or have custom reports, the default location for backing up the SSP is C:\Inetpub\wwwroot\SupportDesk6\CustomerWeb, the default reports folder is C:\Inetpub\wwwroot\SupportDesk6\Reports.
- Uninstall the Web Interface from Add Remove Programs.
- Uninstall the Extensions from Add Remove Programs.
- If you have the client installed on the server perform an upgrade, otherwise upgrade a local client.
    - Once upgraded log in, you will be prompted for the Richsa password, once entered you will be prompted to enter a new serial number if you are upgrading a pre 6.8 database.
    - Specialists will not be able to log in until their SupportDesk Windows client has been upgraded.
- Install the Richmond SupportDesk Extensions.
    - Make sure all services are started from the relevant service controllers.
    - Make sure all services are set to automatic.
- Install the Richmond SupportDesk Web Interface.
    - Once installed enter the SQL server name in the Self Service Portal & Web Reports Administration tool located in Start > Programs > Richmond Systems > SupportDesk Web Interfaces.
    - Enter the SQL server name in the Web.ini file located in C:\Program Files\ComPlus Applications\SupportDesk.
- Upgrade all specialist clients
    - If you are upgrading using the downloaded version from the Richmond Web Site please be sure that the *Main Installer* is being used

Planning the Upgrade

Before upgrading the Richmond SupportDesk main client, Web Interface or any of the Richmond SupportDesk extensions, it is important to have a clear picture of your current Richmond SupportDesk install base so you will be able to upgrade all components with the minimum amount of disruption. The planning process should include:

- **Richmond SupportDesk Main Client:** Identify all the PC's that currently run the Richmond SupportDesk Windows Client. It is advised that all the main clients are upgraded at the same time. The Main Installer distributes other applications such as the Management Console. It is recommended that you make a note of all installed

Richmond SupportDesk components on each workstation being upgraded so that the appropriate components can be selected during the upgrade process.

- **Richmond SupportDesk Web Interface:** If the Richmond SupportDesk Web Interface is being used, identify the web server that is running this service.
- **Richmond SupportDesk Extensions**: Identify which Richmond SupportDesk Extensions are being used and where they are installed.
- **Access and credentials:** Once you have established what is installed and where, you should ensure that you will be able to gain access to all the PC's and Servers that will need to be upgraded and that you have the rights sufficient to Add/Remove applications.

Upgrading from Richmond SupportDesk Pre v7.4

Upgrading the Richmond SupportDesk Main Installer

The main client will need to be uninstalled from Add Remove Programs, when you install the main client select the Custom Setup, you will then be prompted to install the following modules:-

- Window Client
- Alarms Module
- Management Console
- Setup Console
- SMS Module
- Database creation wizard
- RTS Data transfer tool

It is recommended for a standard user that you only select the Main client; administrators will need the Main client, Management Console, Setup Console.

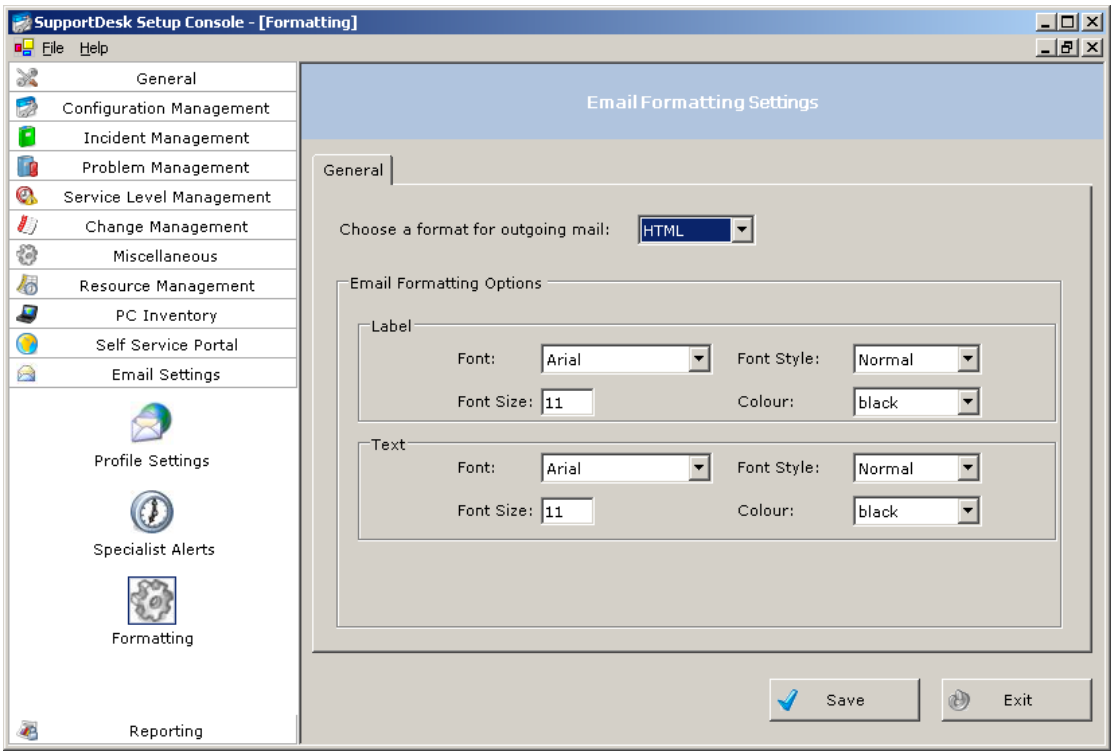
Note: New columns have been added to the Richmond SupportDesk Incident List. If you are upgrading an existing Richmond SupportDesk Windows Client it is possible that the Primary Association, Primary Association Parent, Primary Association Grandparent and Time since Last Action columns are not initially displayed. The Incident List layout is stored for each User of Richmond SupportDesk on the local computer. If these columns are not visible you will need to exit the Richmond SupportDesk client and delete all *.sd6 files that are located in the "C:\Documents and Settings\<User>\Application Data\Richmond Systems" folder. Deleting these files will reset the Incident List layout back to the default.

3 Enabling the new emails settings for upgrades pre V6.8

In SupportDesk 6.8 we introduced new email functionality that needs to be configured before you can start the email services. Please follow the steps below..

3.1 Using Email Formatting

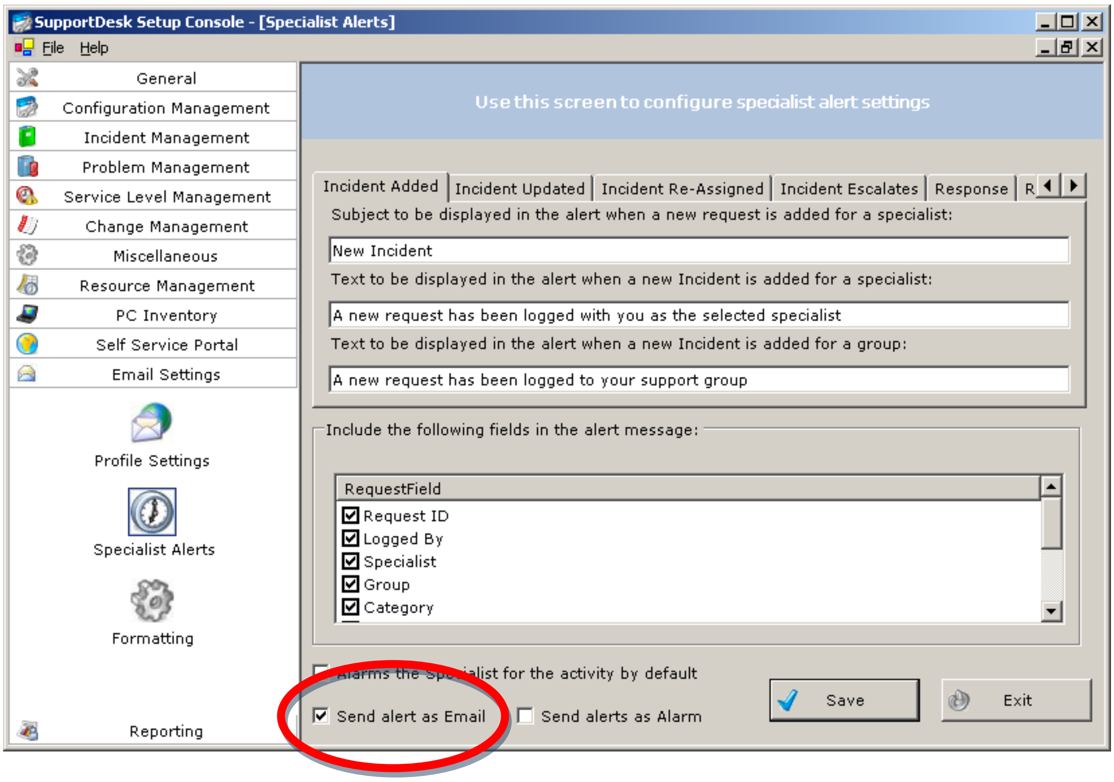
If you want to use the new outgoing HTML email formatting then you must configure this in the Setup Console → Email Settings → Formatting:



You can also add an image to be included in the email signature. This is configured in the Setup Console → Email Settings → Profile Settings →Incident Templates Tab → Signature Tab (second tab from left).

3.2 Specialist Alerts as Emails

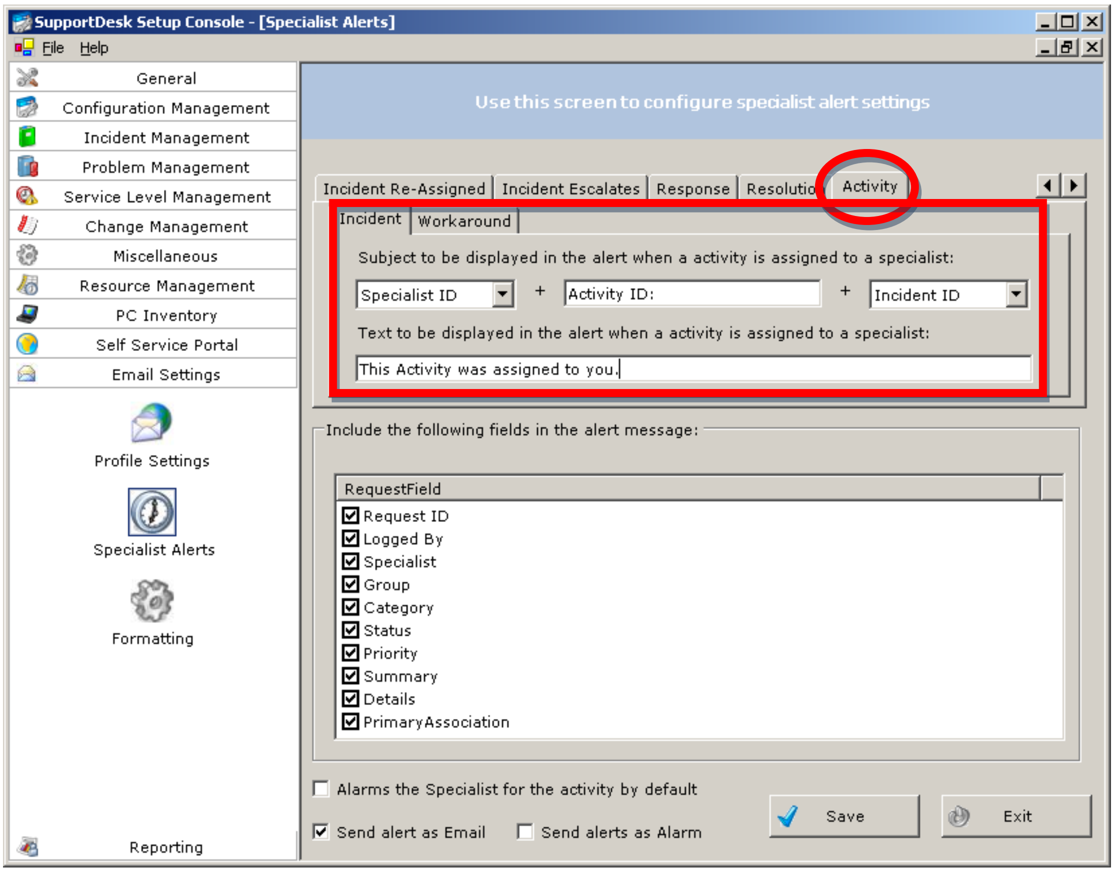
If you want SupportDesk to send alerts via email this must be configured in the Setup Console → Email Settings → Specialist Alerts → Global setting at the bottom of the screen: **Send Alert as Email**



3.3 Specialist Alerts when Activities are Set

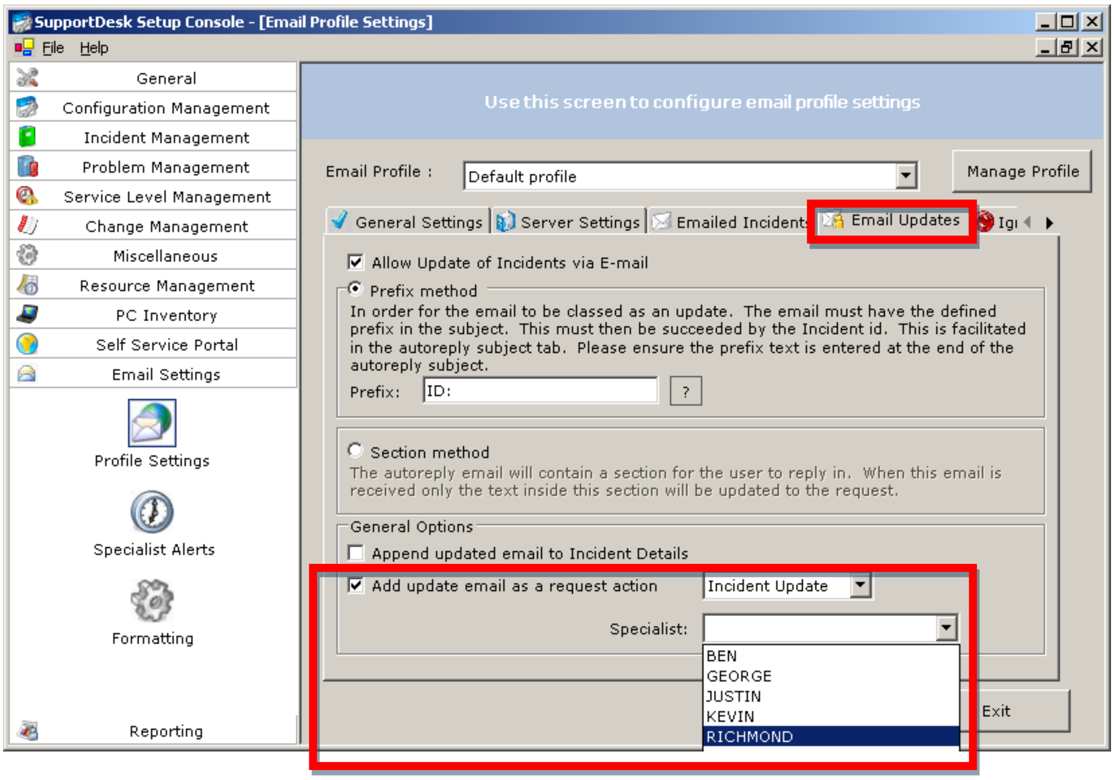
One particularly useful new feature is the ability to configure the Activity Notification to include the update prefix before the Incident ID, thereby ensuring that if a Specialist replies to the email, it will update the incident record.

This is applicable to Activities and Incident Workarounds (Problem Management) and is configured in the Setup Console → Email Settings → Specialist Alerts →Activity Tab (rightmost tab)



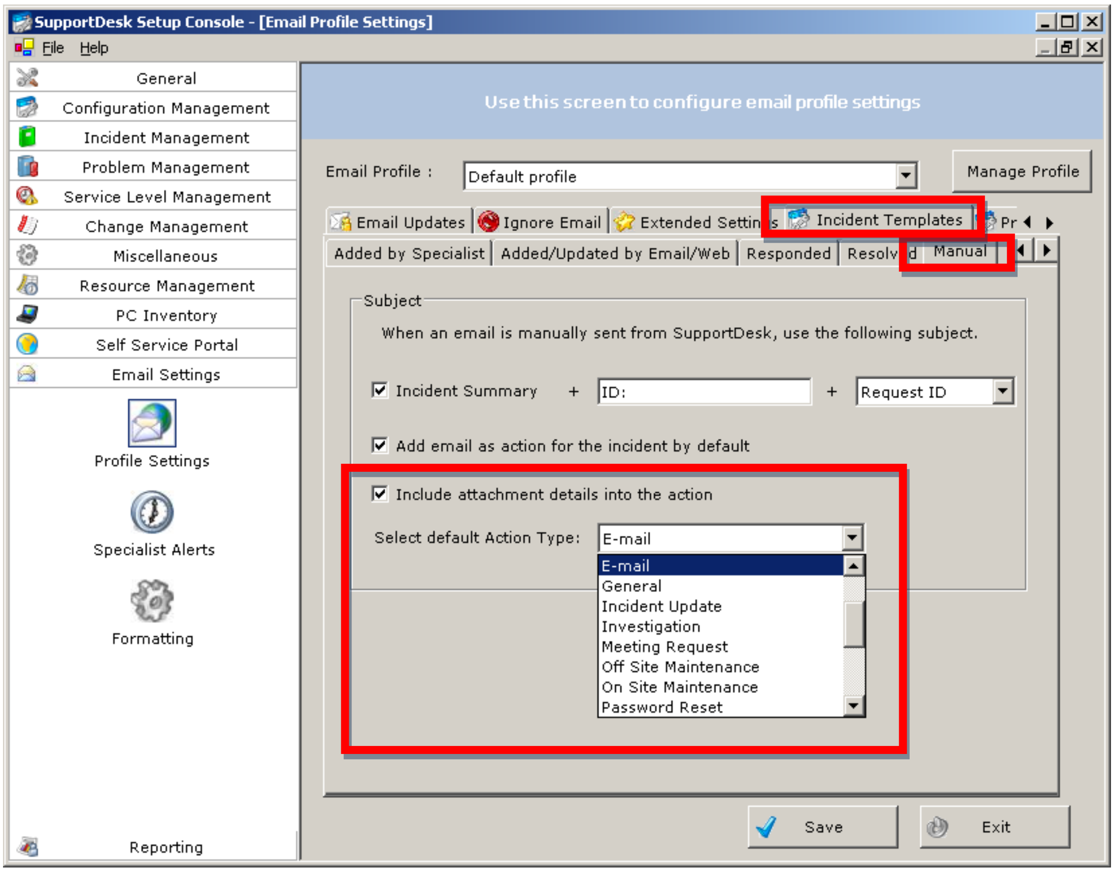
3.4 Setting Specialist for Incidents updated via Email

When an Incident is updated via email, an Action is automatically added to the Incident record and the details of the update are recorded in the Action. This Action needs to be assigned to a Specialist, the setting for which is accessed through the Setup Console → Email Settings → Profile Settings →Email Updates Tab.



3.5 New Options when sending Email from Incident

When sending an email from an Incident record it is now possible to include any attachments that have been sent and specify the Action Type. These settings are configured in the Setup Console → Email Settings → Profile Settings →Incident Templates Tab → Manual Tab (rightmost tab).

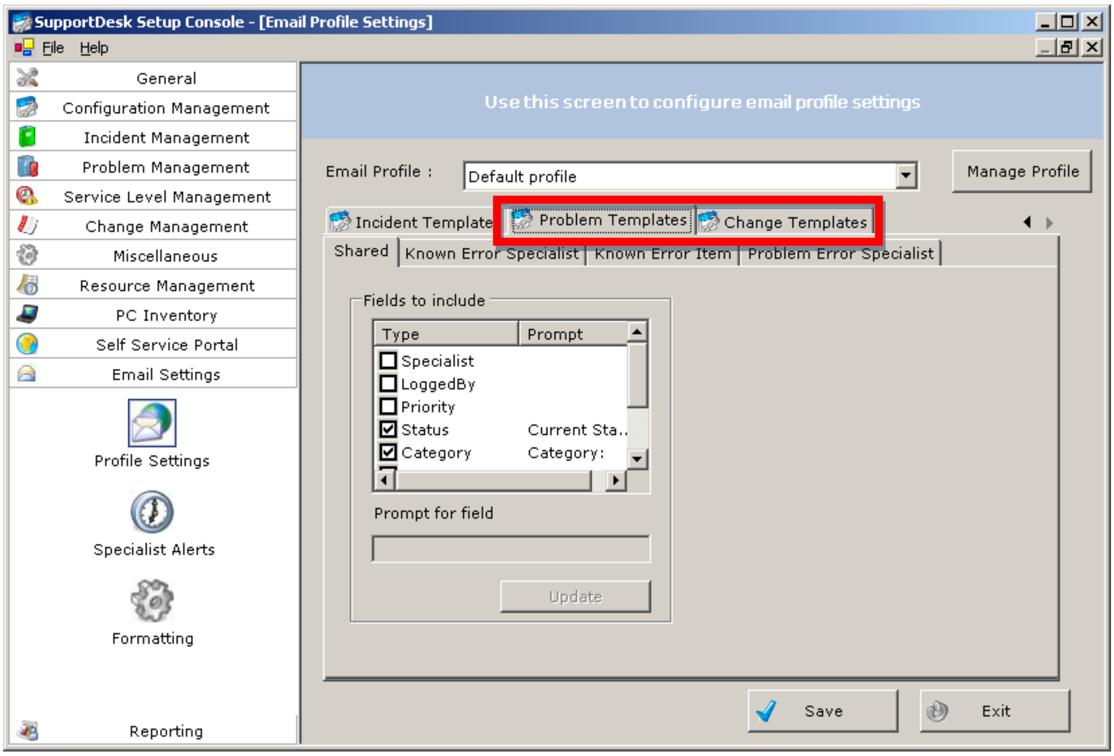


3.6 New Problem and Change Management Email Options

If you are using Problem and Change Management you will need to configure the Problem and Change Outgoing Email templates in the Specialist Profile settings:

Setup Console → Email Settings → Profile Settings →Problem Templates Tab

Setup Console → Email Settings → Profile Settings →Change Templates Tab



4 Important Information for Customers upgrading from v6.73 or prior

Version 6.9 includes a number of new features that require a different approach to configuration and usage from versions prior to 6.73. It is very important that users who are upgrading from version prior to 6.73 familiarise themselves with the key changes before upgrading, particularly if you use the Self Service Portal, Reporting module or have Custom Reports.

4.1 Centralised Report Location

Please be aware that in versions of SupportDesk from v6.73 the reports are stored on your web server with a default path of:

- %Drive%\Inetpub\wwwroot\SupportDesk6\Reports

In previous versions the reports were stored on each PC running the SupportDesk client with a default path of:

- C:\Program Files\Richmond Systems\SupportDesk\Reports

4.2 Custom Report Compatibility

Some Customers have reports that have been custom written. Prior to the 673 release these reports were written using Crystal 8.5. SupportDesk v6.73 and later uses the latest edition of Crystal i.e. Crystal 2008.

Any reports written in Crystal 8.5 will not automatically work in SupportDesk v6.73 or later versions. This will also be the case for user-defined reports, as these take their data from the underlying report template.

The majority of reports written in Crystal 8.5 will work in SupportDesk v6.74 by first opening them in Crystal 2008 and then saving the report file (.rpt) in the correct directory in the reporting module. Commonly this is:

- %Drive%\Inetpub\wwwroot\SupportDesk6\Reports

If you have business critical reports and you are uncertain whether they will run then do not upgrade until you have checked that these reports will run.

If you have any custom reports written by Richmond Systems and you want to check whether they will run in v 6.74 then please email support@richmondsys.com with the report (.rpt) file attached.

Please Note: Richmond Systems cannot take responsibility for reports that have not been written by us.

4.3 System Requirements

The web reporting module is an ASP.Net application therefore a web server is required for the installation and to host the main reporting module files.

Users of the SupportDesk Self-Service Portal (SSP) or Web Interface will already be familiar with this setup however, for new users it is recommended that Internet Information Server (IIS) is used and that the required ASP.Net extensions (in order to allow .aspx pages to function) are installed prior to installing the reports module.

4.4 Web Reporting Information

When we released version 6.73 (March 2009) we included a guide to assist users in the ***configuration and use of web reporting***. This guide is titled “Richmond SupportDesk version 6.73 Upgrade - Essential Information and User Guide” and is available from the Customer Zone or by contacting us.