

Installing The SysAid™ Server Locally

Introduction

SysAid is available in two editions: a fully on-demand ASP solution and an installed, in-house solution for your server. This document will help you install the **in-house edition of SysAid**.

SysAid is a web application. You need to install the SysAid server, which all users will access. SysAid includes a web server; you do not need to install one separately.

Users accessing the help desk will connect to the server via a browser. For asset management, SysAid will deploy the 'SysAid Agent' on the machines of the network. In either case, only the server needs a SysAid installation.

SysAid Server System Requirements

The minimum requirements for SysAid are:

- OS - Windows: NT, 2K, XP, 2003 , Linux , Mac , Solaris
- CPU - 2 GHz
- RAM - 2 Gb
- Disk Space (for application) - 1Gb (initial installation takes ~300 MB)
- Disk Space (for database) - 1Gb

Begin Installation

1. Before beginning installation you should save locally the license file sent to you by e-mail (**activation.xml**) this was sent to you when you ordered SysAid or when you requested the 30-day trial version.
2. To begin installing SysAid, double-click on the file **SysAidServer.exe**. You were also sent this file by e-mail. If you cannot find this file, please contact SysAid for support.
3. Next you will be prompted to **Save** the **SysAidServer.exe** file. Downloading will now commence. Once completed the SysAid Server Set up Wizard screen will appear.
4. To begin installation, close all other applications and click the **Next** button.

Figure 1: SysAid Server Set-up Wizard



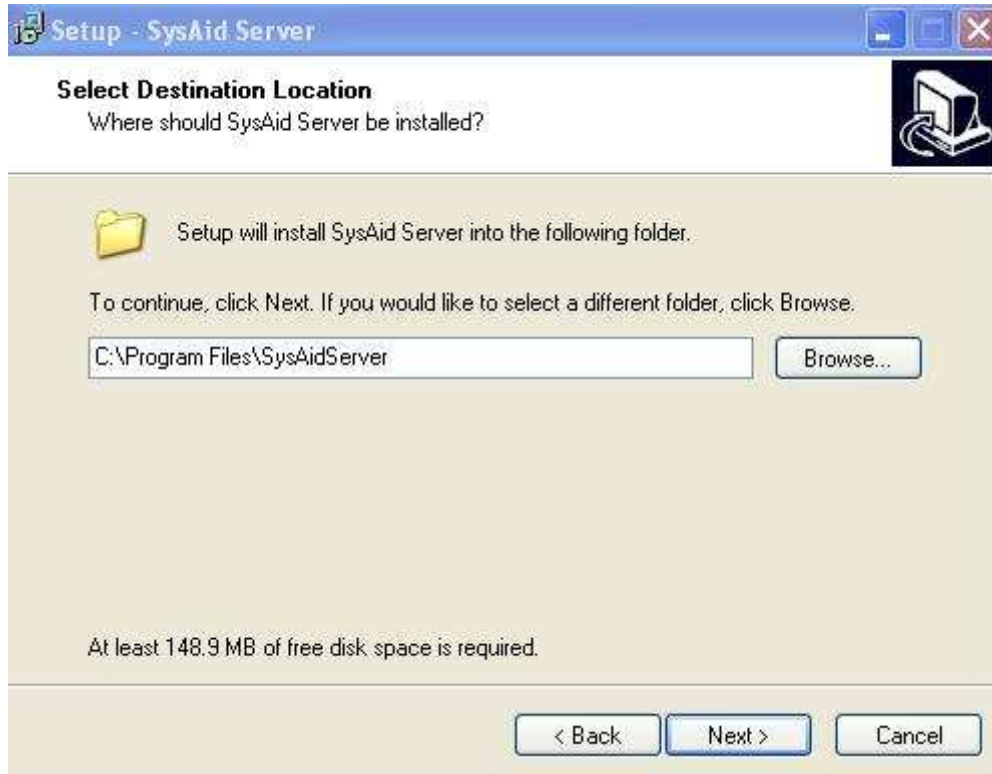
The license agreement will appear, please read it and if you agree click to accept.

Figure 2: SysAid License Agreement



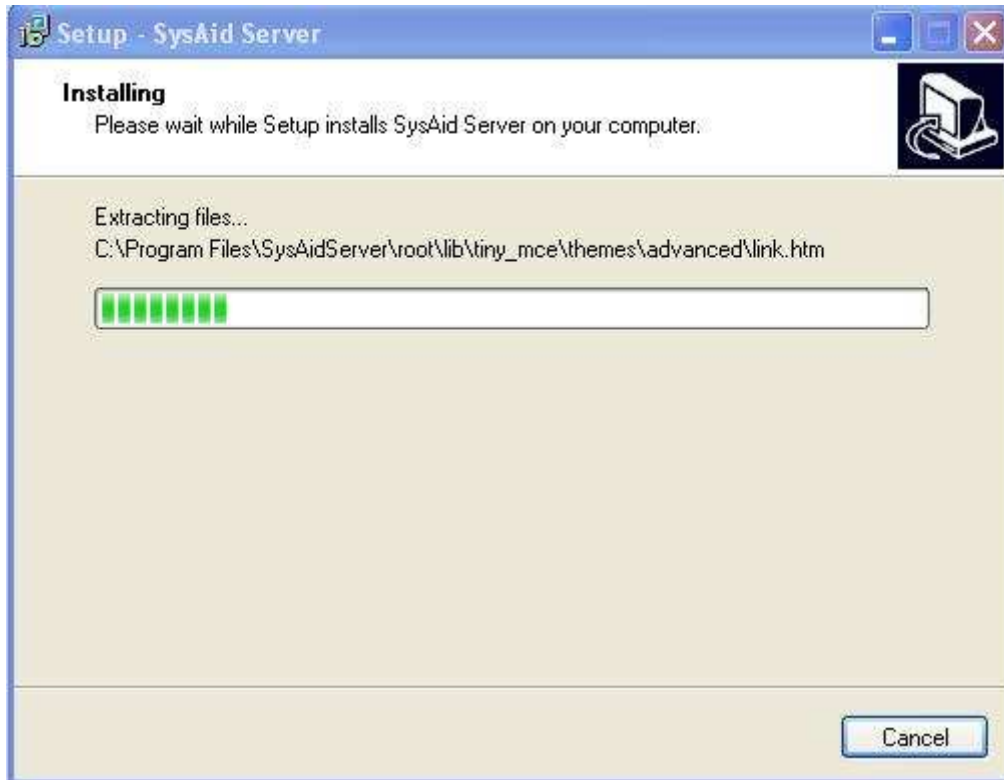
The setup page will appear and you can set in which folder the SysAid server should be installed. The setup wizard will suggest a default, recommended folder under your **Program Files** folder. Click **Browse** to change folder, select the appropriate folder and then click **Next**.

Figure 3: Setting up a folder for SysAid server



The setup wizard will now let you choose where to place shortcuts to the SysAid Server in your Start menu (offering a default shortcut). Next, the wizard will show you your settings. You can change the settings or continue by clicking **Install**, in which case the program will install itself. This may take several moments.

Figure 4: Installation in progress

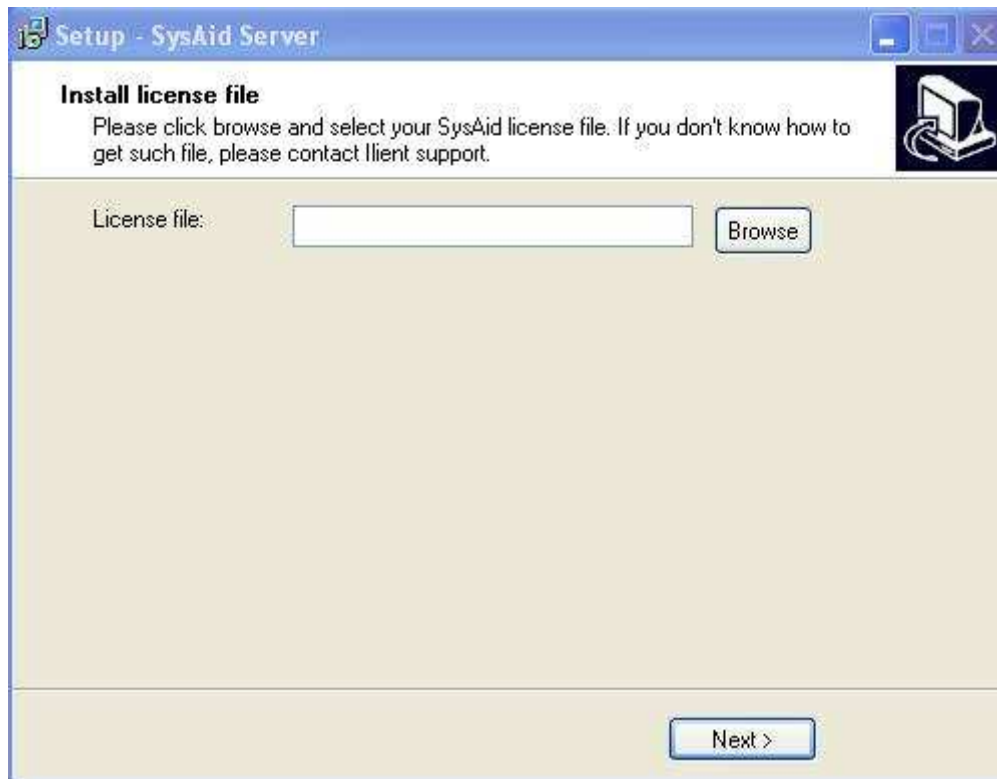


Your License File

Setup will now ask you to input your license file. This XML file lets the setup wizard know that you are authorized to use SysAid.

Click the **Browse** button to select from your disk the license file you were supplied with and which you saved. You were sent this activation file after ordering SysAid. Click Browse to locate where you saved the file. If you cannot find your license file, please contact SysAid for support.

Figure 5: License File Screen



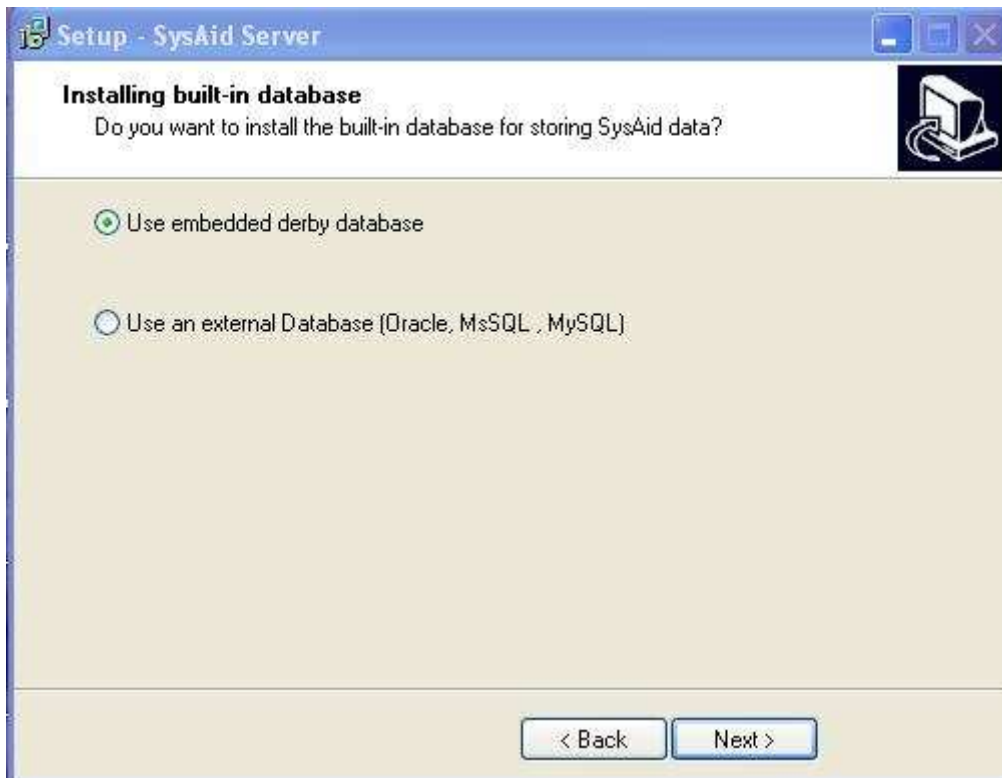
Following successful installation of the license, you will see a pop up box confirming this.



Setting Up a Database

SysAid stores information (your assets, service requests, lists of users, and more) in a database. You may choose to use the Derby embedded database that is included in this installation or one of the external database detailed below.

Figure 6: Installing a database



Embedded Derby Database- Default

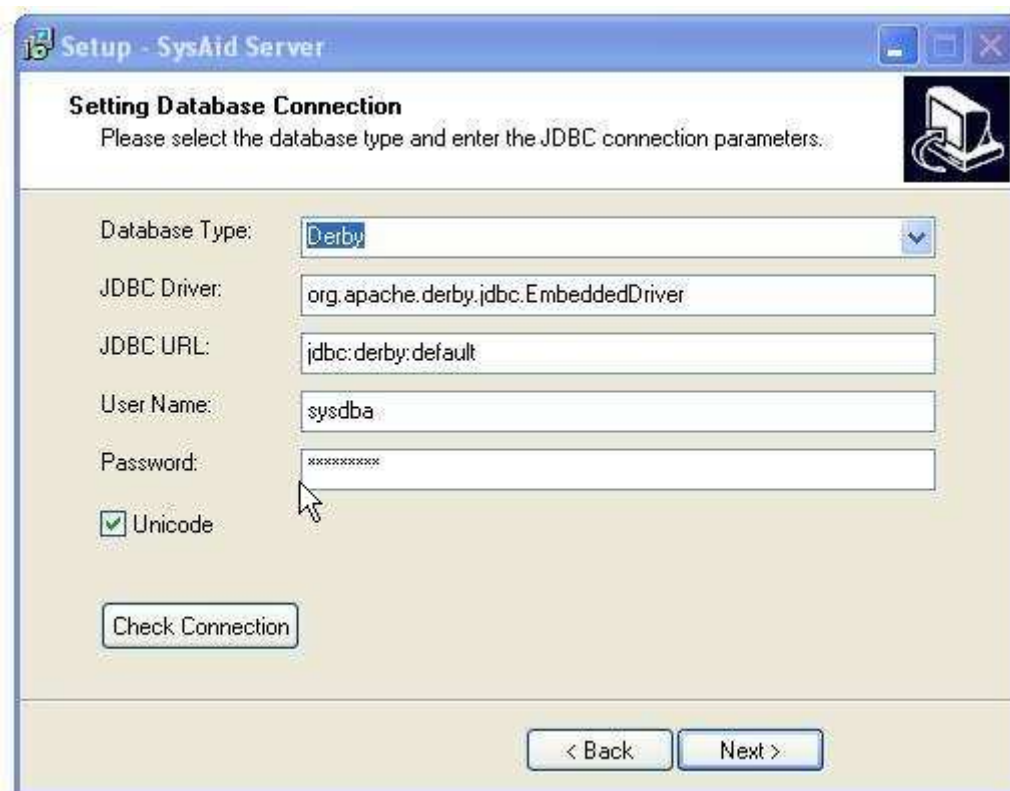
SysAid installation comes with the option to install the Derby database, there is no need for you to be familiar with it in order to set up this database - SysAid installation installs and configures this automatically.

External Database

Another option is to use your own external database. For further information on working with an external database (Oracle, MySQL, and Microsoft SQL Server), please see the appendix in this guide, or contact SysAid for support.

1. Click on the appropriate radio button to select the database and click **Next**.
2. The next screen will display a list of database fields to set the database connection. If you choose to install the default Derby database just click **Next** - All the parameters are already filled.

Figure 7: Set the database connection



3. The Database Type field refers to the type of database system you wish to use (Derby, Oracle, Microsoft SQL Server, or MySQL).
4. The JDBC Driver field refers to the software needed to manage the database.
5. The JDBC URL identifies the name and location of the database.

6. Input a User Name and Password, this will be the username and password for accessing the database.

If you are using an external database, you may consult your local database administrator (DBA) for the appropriate connection parameters, or contact SysAid for support. When using an external database, we recommend using a new (“clean”) database.

To check that the connection to the database is successful, click on the **Check Connection** button. If the connection is successful, you may proceed with the installation. If the connection is unsuccessful, please check that you have typed the correct values into the fields. If the connection is still unsuccessful, consult your DBA or contact SysAid for support.

Figure 8: Confirmation popup for checking your database connection



From this point SysAid will store its data in the selected database.

Setting Your Network Parameters

On this screen you will be asked to specify your network parameters.

Figure 9: Setting Network Parameters

Setup - SysAid Server

Setting Network Parameters
Please enter email parameters and enter the http bind port.

Mail server (SMTP):

Reply address:

Server HTTP port:

1. Input your mail server (SMTP), this is your outgoing mail server. Input your reply address, i.e. e-mail address. SysAid will use your reply address when contacting you.
2. **Server HTTP port** specifies the port the server will listen on. The default is 8080. You will use this port number when logging into SysAid (this is detailed later on).
3. After setting these parameters, you will be prompted to check the connection. If the connection is successful, you will move to the next screen.

Lightweight Directory Access Protocol (LDAP) Integration

You can import your users into SysAid using a compliant active directory software, like Microsoft Active Directory, Open LDAP or Novell LDAP.

Some of the benefits of LDAP integration are that it saves you time by bringing into SysAid all the information you already have about your users, you need not need to manually build new directories, there is no duplication of user data, and you have a basis for a single-sign-on option.

To learn more about LDAP integration, please look at **chapter 3- Setting up Users**, in the [SysAid User Manual](http://ilient.com/download/SysaidUserManual.pdf) at <http://ilient.com/download/SysaidUserManual.pdf>

If you do not want to use LDAP integration, click **Next**.

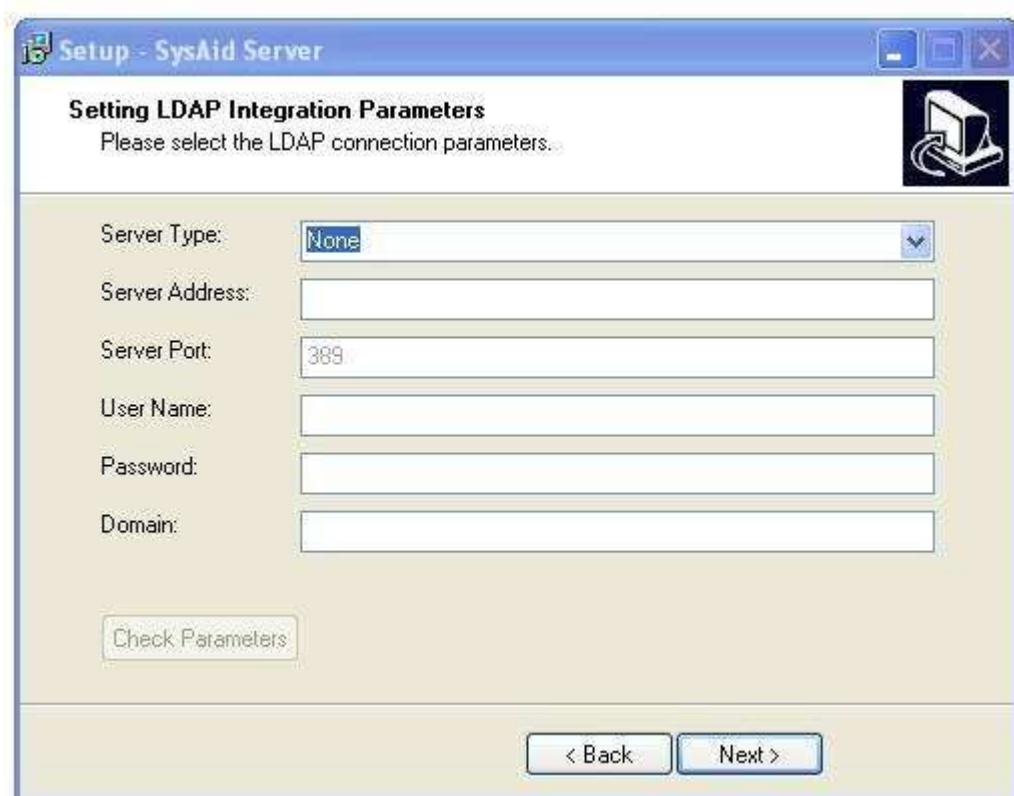
To set up LDAP integration, select from the drop down menu of the **Server Type**.

Make sure you complete the following fields: **Server Address**, **Server Port** and **Domain**.

For the **Username** and **Password** fields, you can use any username that has read only permission.

Finally click the **Check Parameters** button. If successfully checked, click the **Next** button. If you have a problem with setting the parameters, contact SysAid Support.

Figure 10: LDAP integration parameters



The screenshot shows a Windows-style window titled "Setup - SysAid Server". The main heading is "Setting LDAP Integration Parameters" with a sub-instruction: "Please select the LDAP connection parameters...". A small icon of a computer monitor is in the top right corner. The form contains the following fields:

- Server Type: A dropdown menu with "None" selected.
- Server Address: An empty text input field.
- Server Port: A text input field containing "389".
- User Name: An empty text input field.
- Password: An empty text input field.
- Domain: An empty text input field.

Below the fields is a "Check Parameters" button. At the bottom of the window are two navigation buttons: "< Back" and "Next >".

Initializing Your Account and Setting Up A Username and Password

After setting up your database and LDAP integration (if applicable), you will need to input your account details and main user details.

Figure 11: Setting Up Your Account

Setup - SysAid Server

Initializing Account

Please enter your account details and the main user details. Click Next to initialize the database with those details.

Account ID:

Serial Number:

Main User Name:

Password:

Re-type Password:

< Back Next >

1. Your account details (Account ID and Serial Number) will appear as defaults. You will need to input the main user details.
2. It is recommended to choose a user name and a password that are difficult for others to guess.

Since you are installing SysAid, you are the only person who can deal with troubleshooting LDAP. You are now the Main Administrator. Please make a note of your Username and Password, as SysAid cannot assign you a new username and password once you have completed this page. If you forget it, you will have to uninstall and then reinstall the SysAid server.

3. Clicking **Next** will complete the installation. You should finally see the following pop up box.



4. Click **OK**.

Figure 12: Installation complete



5. Installation is now complete.

Installing SysAid creates a service file on your computer called **SysAid Server**.

Getting Started

You have finished installing SysAid. How to start using it?

1. To log into SysAid, open any browser. Input a URI in the following form:
`http://<server IP>:port`

Server IP refers to the IP address of the server SysAid is installed on. **Port** is the port number SysAid is listening on. If the port is 8080, you do not need to enter it, since browsers assume port 8080 by default. You have specified the port number when installing SysAid.

If you are using the computer SysAid is installed on, you already have a shortcut under your **Start** menu. You can start SysAid using this shortcut.

At this point, you are the only user in the system. You will now want to add more users, both end users (who can submit service requests) and administrators (who are also authorized to modify the system and other users' details, access **Tasks/Projects** module and purge the database). Most likely, you will also want to add assets (computers, printers, etc.).

Appendix: Installation of External Databases

Installing SysAid with MySQL Database

SysAid installation contains drivers that can be integrated with MySQL starting from version 4.0 and lower. In order to allow installation of SysAid with MySQL 4.1 and higher, the driver used to connect to the database needs to be replaced:

1. Please download the newer driver from the attached link:

<http://dev.mysql.com/downloads/connector/j/3.1.html>

2. Extract the files and look for the file:

mysql-connector-java-3.1.12-bin.jar

3. Rename this file mysql.jar

4. Now, you can start installing SysAid. In the database selection on the installation wizard, replace the ...\\SysAidServer\\root\\WEB-INF\\lib\\mysql.jar with the new database, and resume the installation.

5. Use the Check Settings button to confirm the connection to the database is successful.

Installing SysAid with MS-SQL database

Only in the full version can SysAid be installed with MS-SQL database.

1. Create an empty database in your server.
2. During the installation, in the database settings dialog, specify the JDBC URL of your empty database. Replace localhost with the SQL server hostname or IP address, and replace SYSAID with the name of your database.
3. Specify a username and a password which have sufficient privileges on that database (DBO). Alternately, you can use the SA account.
4. Click on the Check Setting button to verify successful connection.

Installing SysAid with Oracle database

To Install SysAid with Oracle please follow the usual instructions for installing external databases.

However, if you would like to connect to an Oracle 9i database, please follow the instructions below:

1. Download the new driver for the Oracle 9i the attached link:
<http://www.ilient.com/down/oracle.jar>
2. Create a New User in your Oracle server.
3. During installation, in the database settings dialog, specify the JDBC URL to your empty database.

4. Replace localhost with the host name where the Oracle database is located, or with replace it with its IP address. Replace SYSAID with the instance name.
5. Put in the oracle.jar you have downloaded instead of c:\Program Files\SysAidServer\root\WEB-INF\lib\oracle.jar
6. Enter your username and your password.
7. Click on the Check Setting button to verify successful connection.

If you are still encountering problems with installing SysAid with an external database, please contact our support team.

If you have any questions about the database structure, or any other question about SysAid, feel free to contact us.

Migrating from Firebird database to Derby database

Please note. As of SysAid release 6.0, SysAid no longer supports the Firebird database. If you are using Firebird, please follow the instructions in the link below to migrate to Derby database.

http://www.ilient.com/derby_migration.htm

Related Guides and Reading

To learn how to set up and start using SysAid, please read

Guide 3: Getting Started Guide

http://www.ilient.com/download/getting_started.PDF

It contains everything you need to know about taking your first steps with SysAid. You can also read SysAid's help files, which are accessible through the SysAid interface.

Contact Us

SysAid welcomes your questions, suggestions and any corrections or inaccuracies to this guide. We can be reached via phone and e-mail.

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To contact our support professionals, you may also fill in our online support form at http://www.ilient.com/contact_us.htm