



# Ivanti Service Manager

powered by HEAT

## Installation and Deployment Guide

2018.3

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# About the Installation and Deployment Guide

- "Intended Audience" (5)
- "Document Organization" below
- "Related Documentation" on the next page
- "How to Contact Us" on the next page

## Intended Audience

This document is intended for system administrators who are migrating from ITSM Release 6.x, ITSM Release 7.x, and HEAT Classic to Ivanti Service Manager Release Version 2018.3.

## Document Organization

This guide contains the following sections:

- "Ivanti Service Manager Deployment Overview" on page 7: Describes recommended and optional deployment architectures, including the Ivanti Service Manager reporting feature and Ivanti Voice.
- "Ivanti Service Manager Installation Prerequisites" on page 41: Provides information about confirming your role, the different accounts and passwords used in Ivanti Service Manager, using a virtual machine, enabling file streaming and full-text search in Microsoft SQL Server, and verifying server roles and features.
- "Installing the Ivanti Service Manager System" on page 57: Describes how to install Ivanti Service Manager, including the Ivanti Service Manager Operations Console, the reporting feature, ISM Discovery, and ISM Knowledge.
- "Initially Configuring the System" on page 73: Describes how to use the System Configuration Wizard to configure Ivanti Service Manager, including its servers and databases; and how to use the Ivanti Service Manager Operations Console to configure the deployment.
- "Upgrading Ivanti Service Manager from an Earlier Release" on page 147: Contains information and instructions for upgrading Ivanti Service Manager from an earlier release to the current release.
- "Using the License Manager" on page 154: Explains how to install and use the Ivanti Service Manager License Manager.
- "Troubleshooting" on page 175: Contains solutions to common problems.

## Related Documentation

Ivanti Service Manager has online help available within the application.

Additional documentation is available through

- The [Ivanti community](#) website. You may need to request user access if you cannot log in.

Or through

- The [Ivanti Product Documentation](#) website. Click the Service Manager tile to see a list of the documents available.

## How to Contact Us

To contact us about the documentation, or if you have any other questions or issues about Ivanti Service Manager, contact Ivanti Software Global Support services by logging an incident via Self Service, or at: <https://www.ivanti.com/support/ivanti-support>.

# Ivanti Service Manager Deployment Overview

- "Hardware Considerations" below
- "Demonstration or Proof-of-Concept Deployment" below
- "Minimum Production Deployment " on page 9
- "Enterprise Production Deployment" on page 11
- "Security Enterprise Production Deployment" on page 16
- "Database Deployment Options" on page 19
- "Ivanti Service Manager Operations Console Deployment Options" on page 26
- "Reporting Services Deployment Options" on page 32
- "Voice Deployment Options" on page 38

## Hardware Considerations

The following factors drive the hardware requirements for a new Ivanti Service Manager deployment:

- Ivanti Service Manager supports separate landscapes: development (also called staging), test (also called UAT), and production. You can run these landscapes on the same server or isolate them on separate servers.

If you choose to run them on separate servers, you must provide additional hardware. Except for the demonstration or proof-of-concept deployment, we do not recommend putting all of the landscapes on one server.

- You can adjust the amount of hardware used after you deploy your system, after you have collected usage data. The Ivanti Service Manager software is horizontally and vertically scalable, allowing you to add more hardware to increase performance without license changes.

## Demonstration or Proof-of-Concept Deployment

- "About the Demonstration or Proof-of-Concept Deployment" on the next page
- "Hardware Requirements for the Demonstration or Proof-of-Concept Deployment" on the next page

- "About Installing the Ivanti Service Manager Components for the Demonstration or Proof-of-Concept Deployment" on the next page

## About the Demonstration or Proof-of-Concept Deployment

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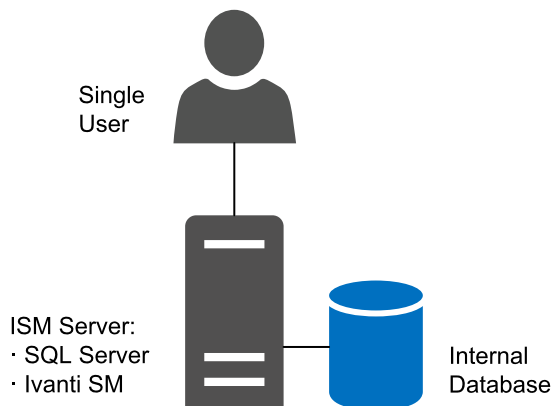
This deployment is only recommended for demonstration purposes. Do not use this deployment for any production environment.

---

You can run the entire Ivanti Service Manager system on a single server for the purpose of a demonstration or a proof-of-concept system.

Install Ivanti Service Manager, with all options enabled, onto a single server that has Microsoft SQL Server loaded locally. Most users install this deployment in a virtual environment.

*Example of Ivanti Service Manager and Databases on a Single Server*



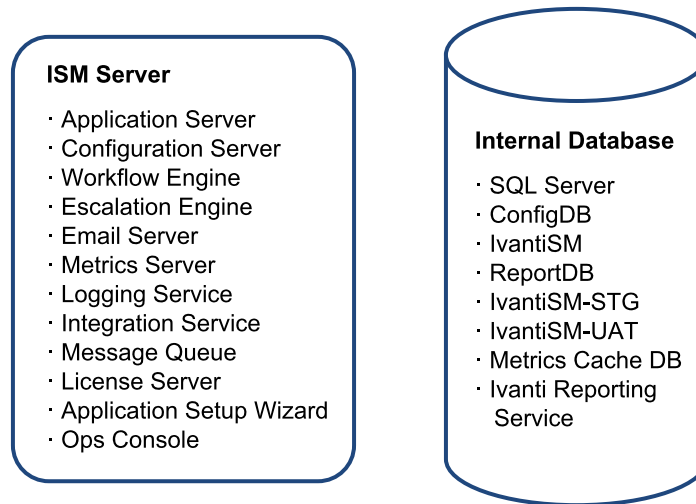
## Hardware Requirements for the Demonstration or Proof-of-Concept Deployment

- 1 server, either virtual or physical
- 1 CPU
- 4 GB memory
- 40 GB hard drive

## About Installing the Ivanti Service Manager Components for the Demonstration or Proof-of-Concept Deployment

"Ivanti Service Manager Components and Databases on a Single Server" below shows a diagram of the recommended locations of the various Ivanti Service Manager software components in this deployment.

*Ivanti Service Manager Components and Databases on a Single Server*



If you plan to include the Ivanti Service Manager reporting feature in your deployment, you must install the Microsoft SQL Server Reporting Services (SSRS) component of Microsoft SQL Server. See "Prerequisites for Installing the Ivanti Service Manager Reporting Feature" on page 49.

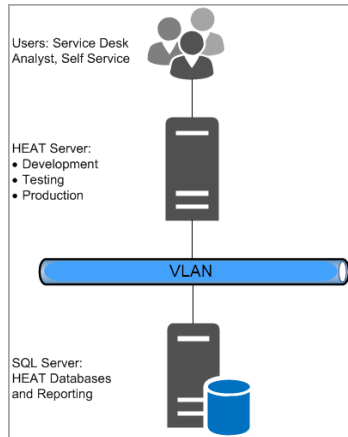
## Minimum Production Deployment

- "About the Minimum Production Deployment" on the next page
- "Hardware Requirements for the Minimum Production Deployment" on the next page
- "About Installing the Ivanti Service Manager Components for the Minimum Production Deployment" on page 11

## About the Minimum Production Deployment

Customers with 10 or fewer users often want to minimize their hardware investment. With the minimum production deployment architecture, you install all Ivanti Service Manager components, except for the Ivanti Service Manager databases, onto a single server. We recommend that you install the Ivanti Service Manager databases onto a separate Microsoft SQL server.

*Example of Ivanti Service Manager and Databases on Separate Servers*



In this deployment, all three landscapes (development [staging], testing [UAT], and production) run on the same server. As a result:

- Any issues created during the development cycle might affect production users.
- You cannot perform preupgrade testing.

## Hardware Requirements for the Minimum Production Deployment

The following are the hardware requirements for the Ivanti Service Manager server:

- One server, either physical or virtual
- 2 CPU
- 4 GB memory
- 200 GB hard drive

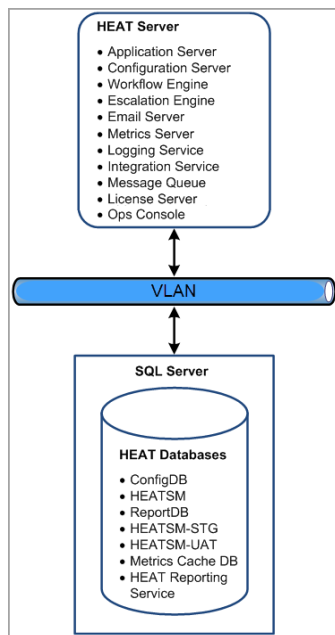
The following are the hardware requirements for the Microsoft SQL server where the databases reside:

- One server (we recommend a physical server)
- 2 CPU
- 8 GB memory
- 1 TB hard drive

## About Installing the Ivanti Service Manager Components for the Minimum Production Deployment

"Ivanti Service Manager Components and Databases on Separate Servers" below shows a diagram of the recommended locations of the various Ivanti Service Manager software components in this deployment.

*Ivanti Service Manager Components and Databases on Separate Servers*



## Enterprise Production Deployment

- "About the Enterprise Production Deployment" below
- "Hardware Requirements for the Enterprise Production Deployment" on the next page
- "High Availability and Load Balancing" on page 15
- "About Installing the Ivanti Service Manager for the Enterprise Production Deployment" on page 15

## About the Enterprise Production Deployment

Customers supporting large user populations of 100 or more are primarily concerned with availability and load management rather than with minimizing hardware expense. Customers with more than 100 users should use this setup as a baseline and then add the equivalent amount of hardware for each additional 100 users. The enterprise production deployment architecture splits Ivanti Service Manager into:

- Front-end web servers

- Back-end processing servers

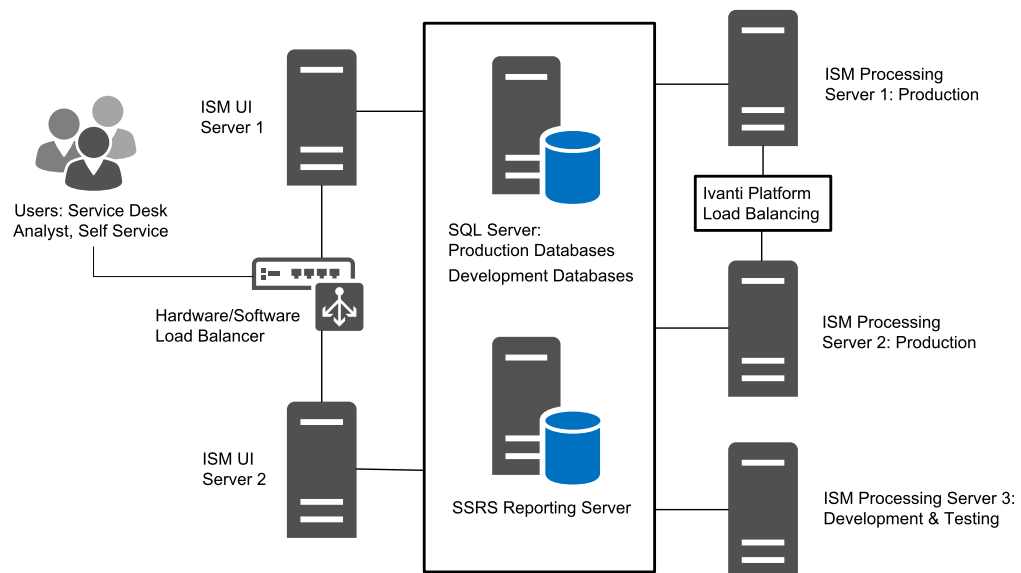
The back-end servers handle workflow, email processing, license allocation, inventory management, and so on. This architecture also separates the production environment from development and testing.

There are two key advantages of separating development and testing from production:

- Any issues created during the development cycle do not affect production users.
- You can perform upgrade testing on the development and testing servers before upgrading the production servers.

Optionally, you can install your development and test landscapes onto separate physical servers.

*Example of Ivanti Service Manager in an Enterprise Deployment*



## Hardware Requirements for the Enterprise Production Deployment

- "Web Servers" on the next page
- "Processing Servers (Production)" on the next page
- "Processing Servers (Development and Testing)" on the next page
- "Microsoft SQL Server Requirements" on page 14
- "Microsoft SSRS Reporting Server" on page 14



- "Hardware Requirements when Adding Additional Users" on the next page

## **Web Servers**

The following are the hardware requirements for the Ivanti Service Manager web servers:

- Two virtual servers
- Outside the firewall
- Load balanced
- 4 CPU
- 16 GB memory
- 200 GB hard drive

## **Processing Servers (Production)**

The following are the hardware requirements for the Ivanti Service Manager processing servers used for the production landscape:

- Two virtual servers
- Inside the firewall
- Load balanced
- 4 CPU
- 16 GB memory
- 200 GB hard drive

## **Processing Servers (Development and Testing)**

The following are the hardware requirements for the Ivanti Service Manager processing server used for the development (staging) and testing (UAT) landscapes:

- One physical or virtual server
- 2 CPU
- 4 GB memory
- 200 GB hard drive

## Microsoft SQL Server Requirements

Microsoft SQL Server is the database server for the deployment. Depending on your needs, you may have multiple database servers. The following are the requirements for the Microsoft SQL server where the databases reside:

- One physical server
- Microsoft SQL Server Release 2012
- Inside the firewall
- 8 CPU
- 24 GB memory
- 1 TB hard drive

## Microsoft SSRS Reporting Server

The reporting feature requires that Microsoft SQL Server Reporting Services (SSRS) be installed and running on the database server that hosts the Ivanti Service Manager reporting feature.

Microsoft SSRS can be installed on the Microsoft SQL server or on a separate Microsoft SSRS server, depending on your preference. We recommend a separate installation in the following situations:

- Multi-tenant environments, including managed service providers and enterprises with multiple Ivanti Service Manager tenants.
- The Microsoft SQL database is used also for applications other than Ivanti Service Manager.
- Installations where the database server must remain online, because upgrading Microsoft SSRS often requires a reboot.

The following are the requirements for the Microsoft SQL Server Reporting Services (SSRS) reporting server:

- One physical server
- Microsoft SQL Server Release 2012
- Inside the firewall
- 8 CPU
- 24 GB memory
- 1 TB hard drive

## Hardware Requirements when Adding Additional Users

For each additional 100 users, add this to architecture:

- Two additional Ivanti Service Manager web servers.
- Two additional Ivanti Service Manager processing servers.

System load determines the actual number of servers to add. You can add the web and processing servers on demand.

In most cases, you do not need to add more development (staging) or testing (UAT) servers.

## High Availability and Load Balancing

You can achieve high availability through physical load balancing or by load balancing handled within Ivanti Service Manager. For example, in the configuration shown in "Example of Ivanti Service Manager in an Enterprise Deployment" on page 12. The Ivanti Service Manager components are connected to one or more load-balanced servers. In this example:

- The Ivanti Service Manager web servers, which contain Ivanti Service Manager components that are user-facing, all connect to a physical load-balancing server.
- The Ivanti Service Manager process servers, which contain Ivanti Service Manager components that are not user-facing, do not connect to a physical load-balancing server, but instead use a built-in load balancer. The escalation engine, workflow engine, and email server have built-in load-balancing mechanisms.
- The Ivanti Service Manager web servers and process servers all connect to the same Ivanti Service Manager application database and configuration database. High availability for the Ivanti Service Manager databases is achieved through a cluster.

Communication within the system, such as between a Ivanti Service Manager process server and a Ivanti Service Manager web server, does not require SSL. However, external communication can use SSL.



If you use SSL in your high-availability, load-balancing deployment, you must use a fully-qualified domain name for the server locations. See the instructions in "Optional SSL Configuration" on page 129. In particular, in the **SSL certificate** field, you must enter a fully-qualified domain name.

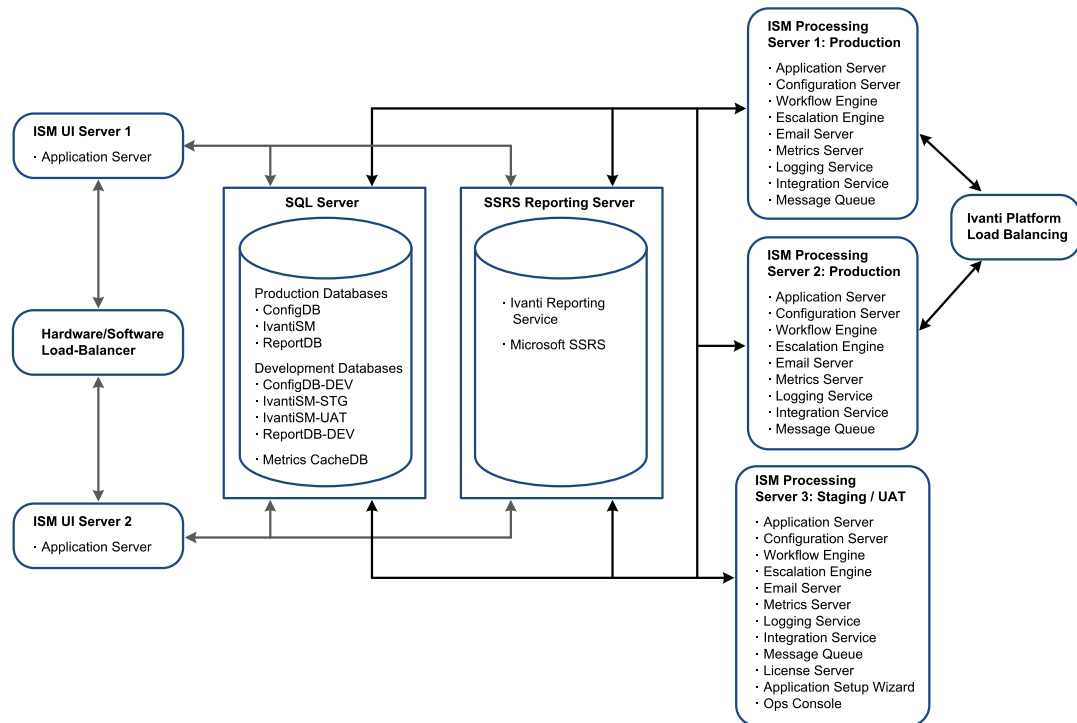
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When using a hardware load balancer, turn on session persistence so that connections from the web browsers always get directed to the same web server.

## About Installing the Ivanti Service Manager for the Enterprise Production Deployment

"Ivanti Service Manager Components and Databases in an Enterprise Deployment" below shows a diagram of the recommended locations of the various Ivanti Service Manager components.

*Ivanti Service Manager Components and Databases in an Enterprise Deployment*



## Security Enterprise Production Deployment

- "About the Security Enterprise Production Deployment" below
- "About Using a DMZ with Web Servers" on the next page
- "About Using a DMZ with Reverse Proxy Servers" on page 18

### About the Security Enterprise Production Deployment

This deployment is based on the "Enterprise Production Deployment" on page 11 with a DMZ added to provide security where users log in from outside of the company network.

We recommend the following DMZ configurations:

- DMZ with Ivanti Service Manager web servers
- DMZ with reverse proxy servers

The DMZ is configured for authenticated access. When web servers are in the DMZ, each user must enter his user name and password to log into Ivanti Service Manager. This architecture involves the additional cost of setting up and maintaining two firewalls.

Where you implement reverse proxy servers, you can add another layer of access authentication. This architecture involves the additional cost of setting up and maintaining two reverse proxy servers and a load balancer.

## About Using a DMZ with Web Servers

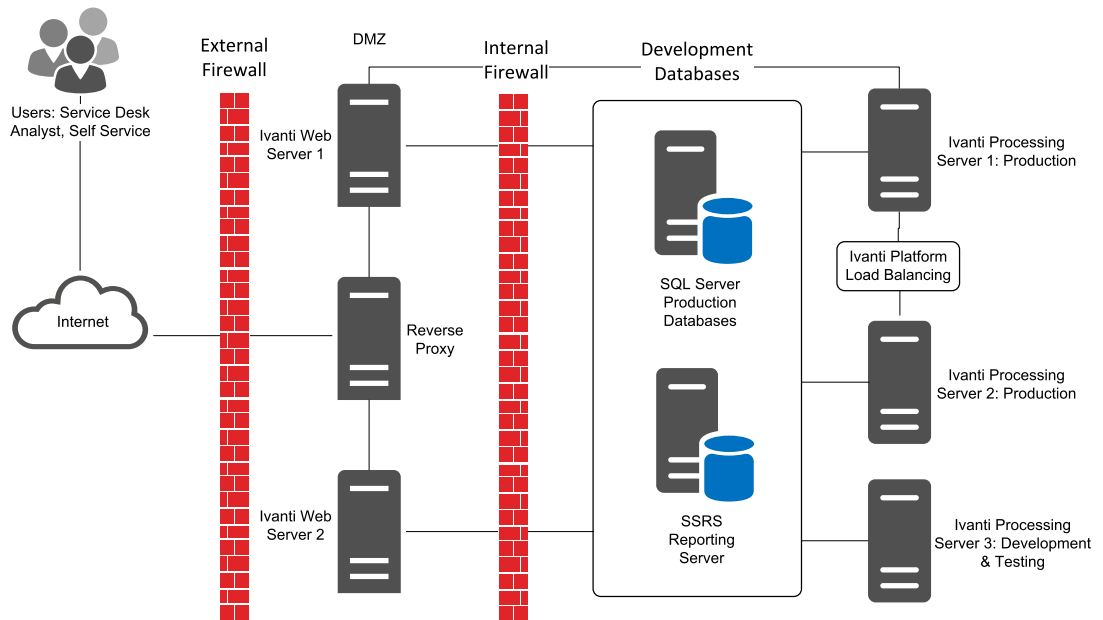
This option offers a greater level of security than placing your Ivanti Service Manager web servers outside of a single company firewall. Placing a second firewall between the Internet and the web servers forms a semi-trusted network that prevents external access to your Ivanti Service Manager process servers and databases.

We recommend that you harden the Ivanti Service Manager web servers by taking the following actions:

- Disabling all unnecessary services
- Running necessary services with the lowest possible privileges
- Requiring strong passwords
- Locking an account after a certain number of login failures
- Deleting or disabling unnecessary user accounts, such as the guest user account
- Renaming or changing the description of the administrator account
- Installing the latest security updates and patches on the server
- Enabling security logging and checking the logs frequently

The same Ivanti Service Manager components are installed on the web servers when they are located in the DMZ as when they are located outside of the company firewall. See "About Installing the Ivanti Service Manager for the Enterprise Production Deployment" on page 15.

*Example of an Enterprise Deployment with Ivanti Service Manager Web Servers in the DMZ*



## About Using a DMZ with Reverse Proxy Servers

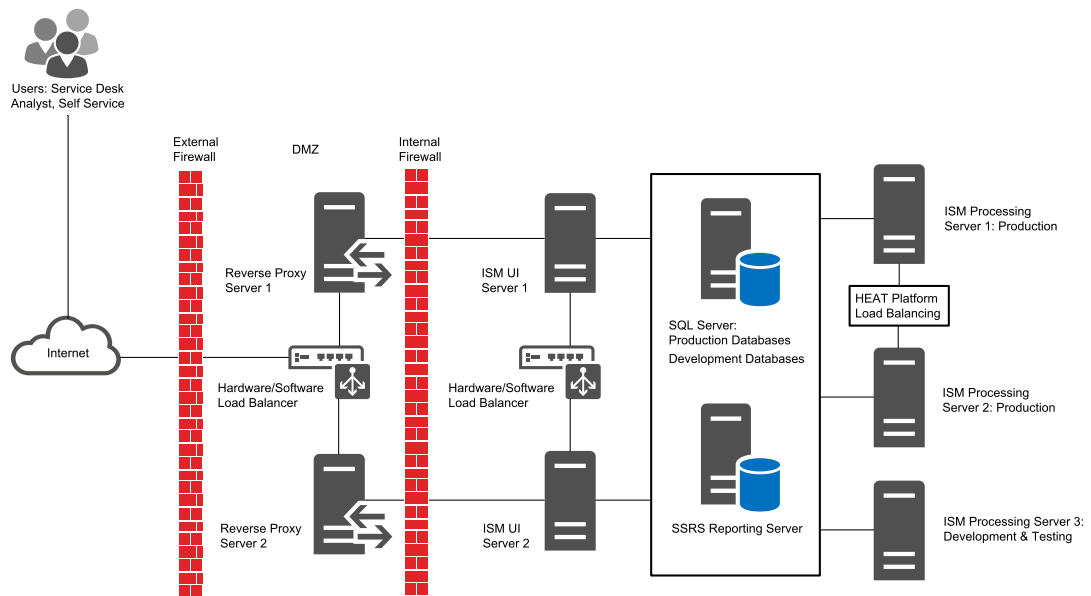
This option offers the greatest level of security by placing your web servers inside the company firewall. By placing reverse proxy servers in the DMZ, you prevent direct user login to the Ivanti Service Manager web servers.

In addition, by locating the web servers on the same network as the process servers and databases, you achieve a true three-tier architecture.

The same Ivanti Service Manager components are installed on the web servers when they are located inside the firewalls as when the servers are located outside.

This architecture involves the additional costs of servers to host the reverse-proxy service, as well as setting up and maintaining a second firewall. See "About Installing the Ivanti Service Manager for the Enterprise Production Deployment" on page 15.

*Example of an Enterprise Deployment with Ivanti Service Manager Reverse Proxy Servers in the DMZ*



## Database Deployment Options

This section describes the different options available for the Ivanti Service Manager databases.

- "About the Databases Used in Ivanti Service Manager" below
- "Diagram Conventions" on page 21
- "Option D1: Separate Database Servers (Recommended and Best Practice)" on page 22
- "Option D2a: Single Database Server (Best Practice)" on page 22
- "Option D2b: Single Database Server" on page 23
- "Option D3: Single Configuration Database on a Single Database Server" on page 24
- "Option D4: Multiple Configuration Databases on a Single Server" on page 24
- "Option D5: Multiple Configuration Databases on Multiple Servers" on page 25
- "Option D6: Single Configuration Database on Separate Database Servers (for MSPs)" on page 26
- "Option D7: Multiple Configuration Databases on Separate Database Servers (for MSPs)" on page 26

## About the Databases Used in Ivanti Service Manager

The following are the databases used in Ivanti Service Manager:

- configuration database (ConfigDB)
- Ivanti Service Manager application database (IvantiSM)
- Ivanti Service Manager reporting database (ReportDB). This database is used for the reporting feature. See "Reporting Services Deployment Options" on page 32 for more information.
- Metrics cache database (Metrics Cache DB). This database is used to cache the run-time state of the schedule jobs. Only one metrics cache database is needed in each isolated landscape. For example, if the configuration database and the Ivanti Service Manager application database are hosted on the same database server, your deployment only needs one metrics cache database.

In addition, there are generally three instances for each tenant:

- Staging
- UAT
- Production

Each tenant instance, Staging (development), UAT (Test) and Production, can have its own database instance or server. These are called:

| Database         | Description  |
|------------------|--|
| IvantiSM         | Application database for production                                |
| IvantiSM-STG     | Application database for staging (development)                     |
| IvantiSM-UAT     | Application database for UAT (testing)                             |
| IvantiSM-Dev     | Application database for staging (development) and UAT (testing)   |
|                  |  |
| ConfigDB         | Configuration database for production                              |
| ConfigDB-STG     | Configuration database for staging (development)                   |
| ConfigDB-UAT     | Configuration database for UAT (testing)                           |
| ConfigDB-Dev     | Configuration database for staging (development) and UAT (testing) |
|                  |  |
| ReportServer     | Report database for production                                     |
| ReportServer-STG | Report database for staging (development)                          |
| ReportServer-UAT | Report database for UAT (testing)                                  |
| ReportServer-Dev | Report database for staging (development) and UAT (testing)        |



The advantage of hosting a database on its own server is that it ensures security by isolating the production landscape. It also enhances performance. When you make multiple changes or upgrades to the staging or UAT landscapes, you do not want that to affect the performance of the production landscape. Separating the different databases makes it easier to upgrade the systems, because when you upgrade the systems you have to shut them down and that affects users in the production landscape.

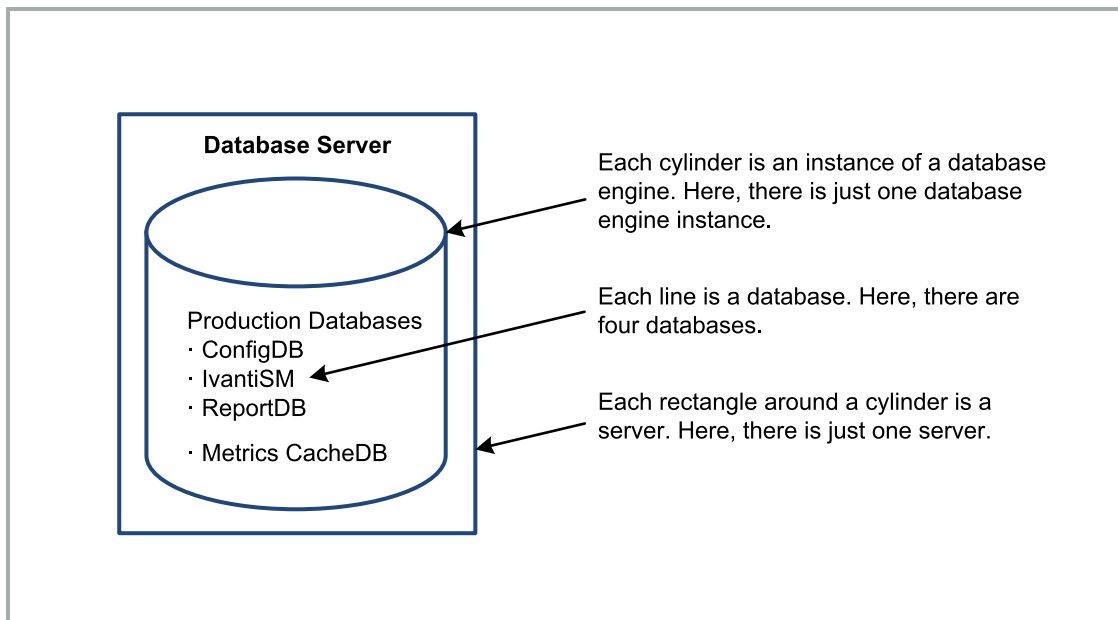
The advantage of hosting everything on one server is that you save money by only having to purchase and administer one server and one Microsoft SQL Server license.

## Diagram Conventions

The following conventions are used in the diagrams:

- A line item is considered a database. There can be many databases within one database engine instance.
- A barrel is considered a database engine instance. It can contain multiple database instances.
- A square or rectangle around something means it is on one server (machine). Each server can potentially host multiple database engine instances.

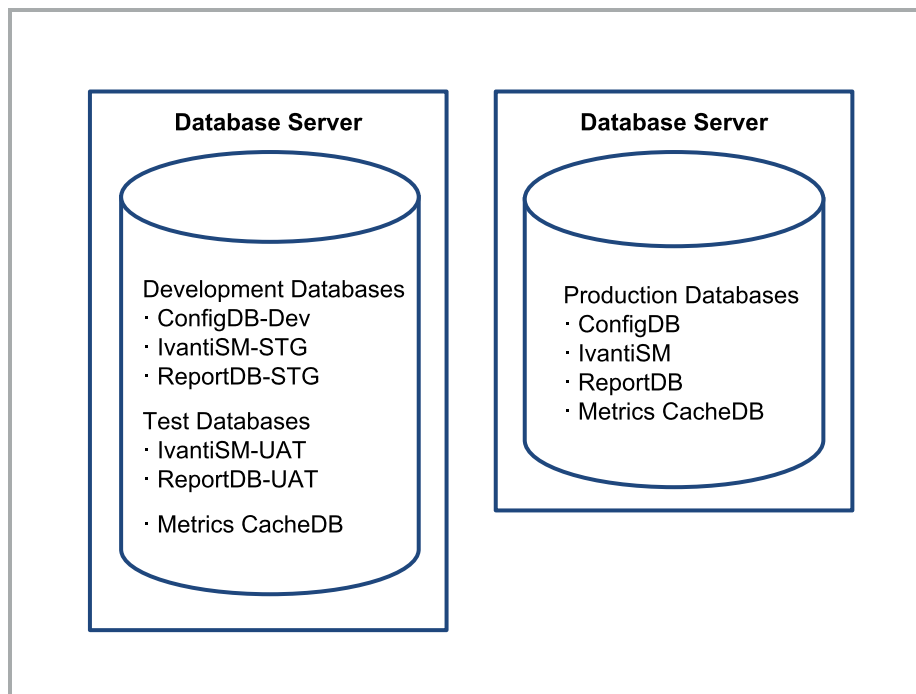
### Diagram Conventions



## Option D1: Separate Database Servers (Recommended and Best Practice)

In this deployment, there are two separate database servers. One is for the production landscape and the other is for the staging and UAT landscape. The staging and UAT servers share a configuration database.

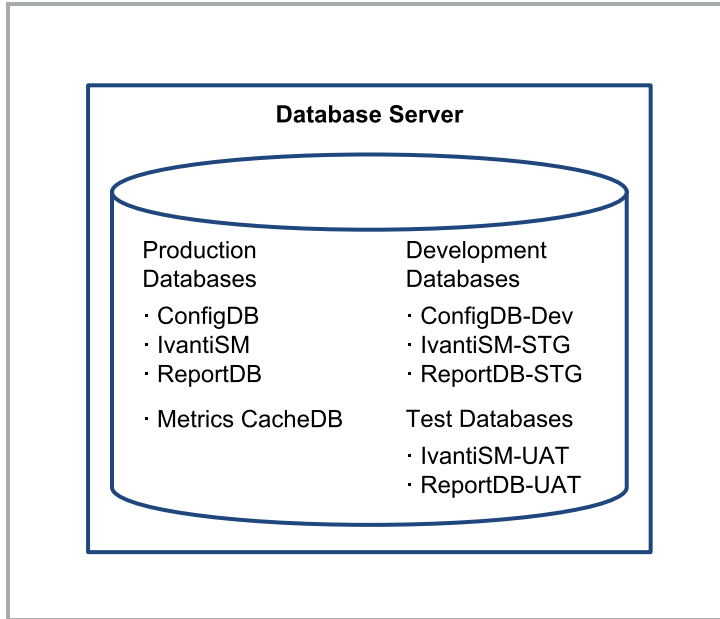
*Example of Separate Database Servers*



## Option D2a: Single Database Server (Best Practice)

In this deployment, there is a single database server and one configuration database (ConfigDB-Dev).

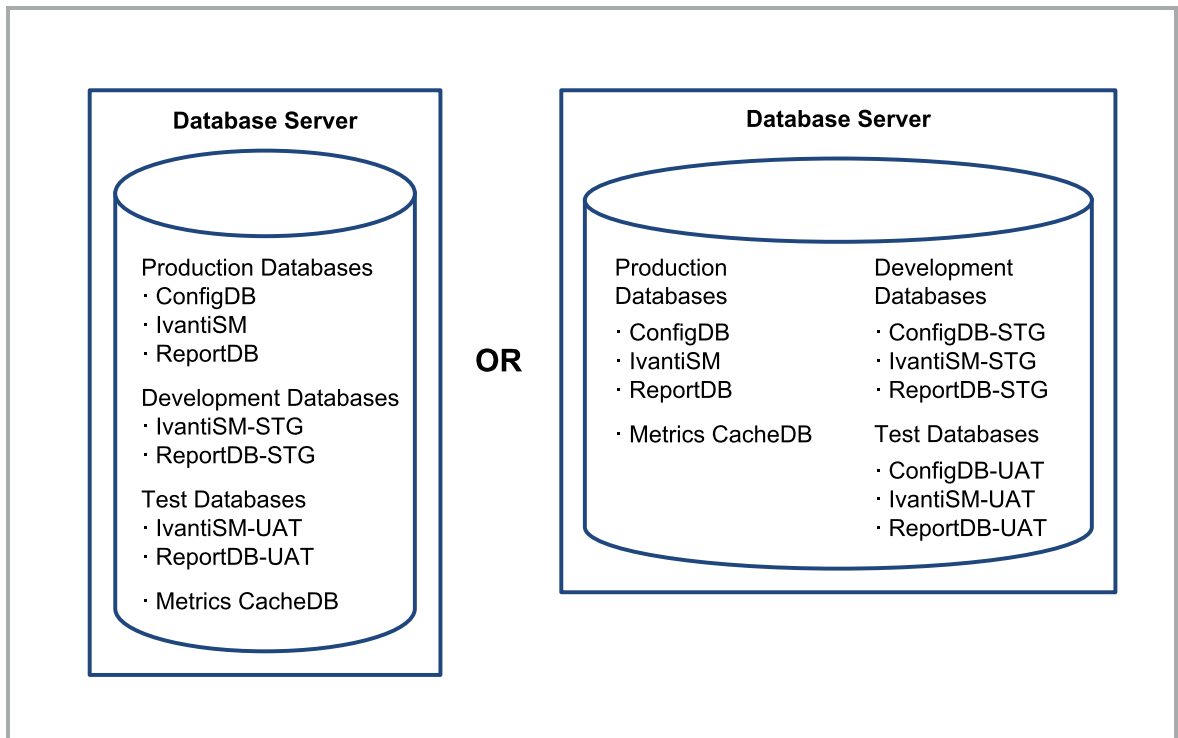
*Example of Recommended Single Database Server*



### Option D2b: Single Database Server

In this deployment, there is a single database server and either no configuration database or two configuration databases (ConfigDB-STG and ConfigDB-UAT).

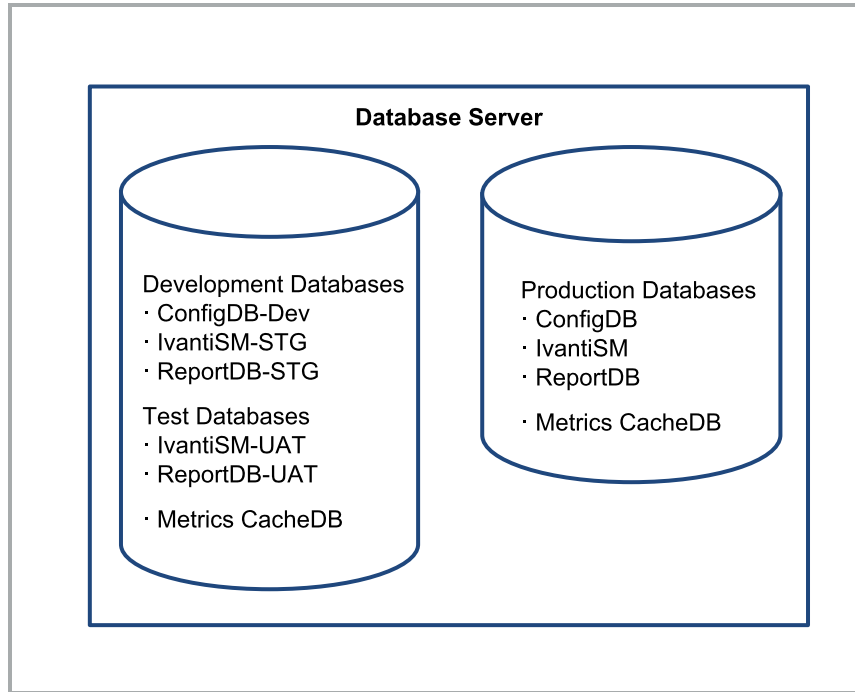
*Example of Alternative Single Database Servers*



## Option D3: Single Configuration Database on a Single Database Server

In this deployment, there is one configuration database for the production landscape and another configuration database shared between the staging and UAT landscapes.

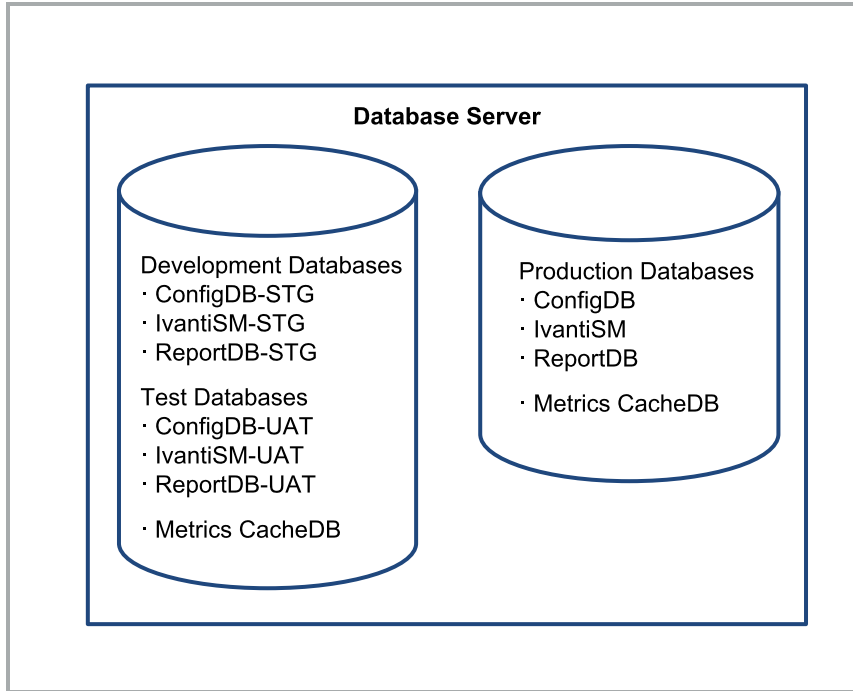
*Example of Separate Database Engine Instances on a Single Database Server*



## Option D4: Multiple Configuration Databases on a Single Server

In this deployment, there are separate configuration databases for the production landscape, the staging landscape, and the UAT landscape.

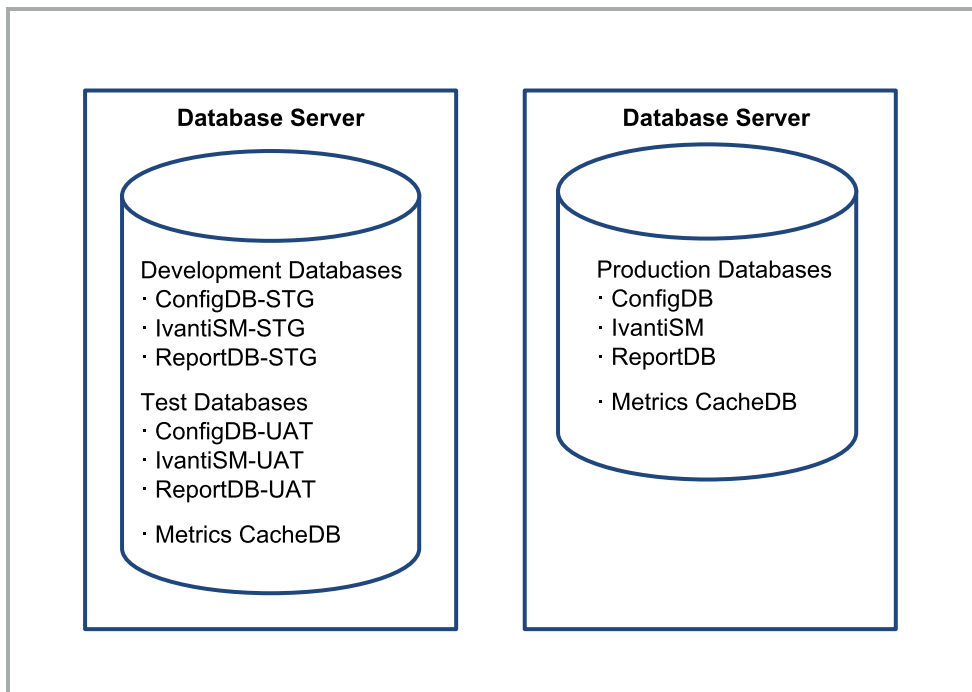
*Example of Multiple Configuration Databases on a Single Server*



### Option D5: Multiple Configuration Databases on Multiple Servers

In this deployment, there are separate configuration databases for the production landscape, the staging landscape, and the UAT landscape and separate instances.

*Example of Multiple Configuration Databases on Multiple Servers*

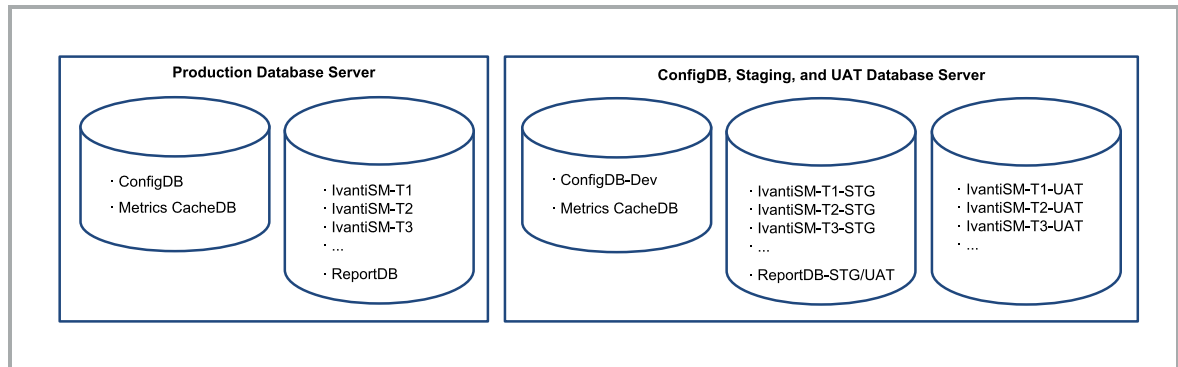


## Option D6: Single Configuration Database on Separate Database Servers (for MSPs)

A Managed Service Provider (MSP) is a service partner who provides Ivanti Service Manager for multiple tenants or outside customers.

In this deployment, there is a single configuration database shared between landscapes.

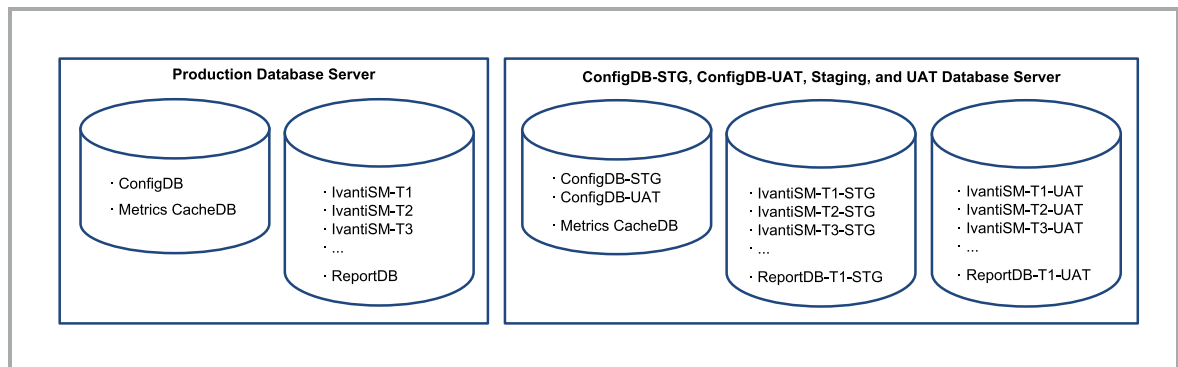
*Example of a Single Configuration Database on Separate Database Servers*



## Option D7: Multiple Configuration Databases on Separate Database Servers (for MSPs)

In this deployment, there are separate configuration databases for the production landscape, the staging landscape, and the UAT landscape and separate instances.

*Example of Multiple Configuration Databases on Separate Database Servers*



## Ivanti Service Manager Operations Console Deployment Options

- "About the Ivanti Service Manager Operations Console Deployment Options" on the next page

- "Option OC1: Separate Configuration Databases and Application Servers for Production and Development (Best Practice)" below
- "Option OC2: Two Configuration Databases and Separate Application Servers for Each Landscape (Best Practice)" on the next page
- "Option OC3: Separate Configuration Databases for Each Landscape (Best Practice)" on page 29
- "Option OC4: One Configuration Database and One Application Server" on page 30
- "Option OC5: One Configuration Database and Separate Application Servers for Each Landscape" on page 31

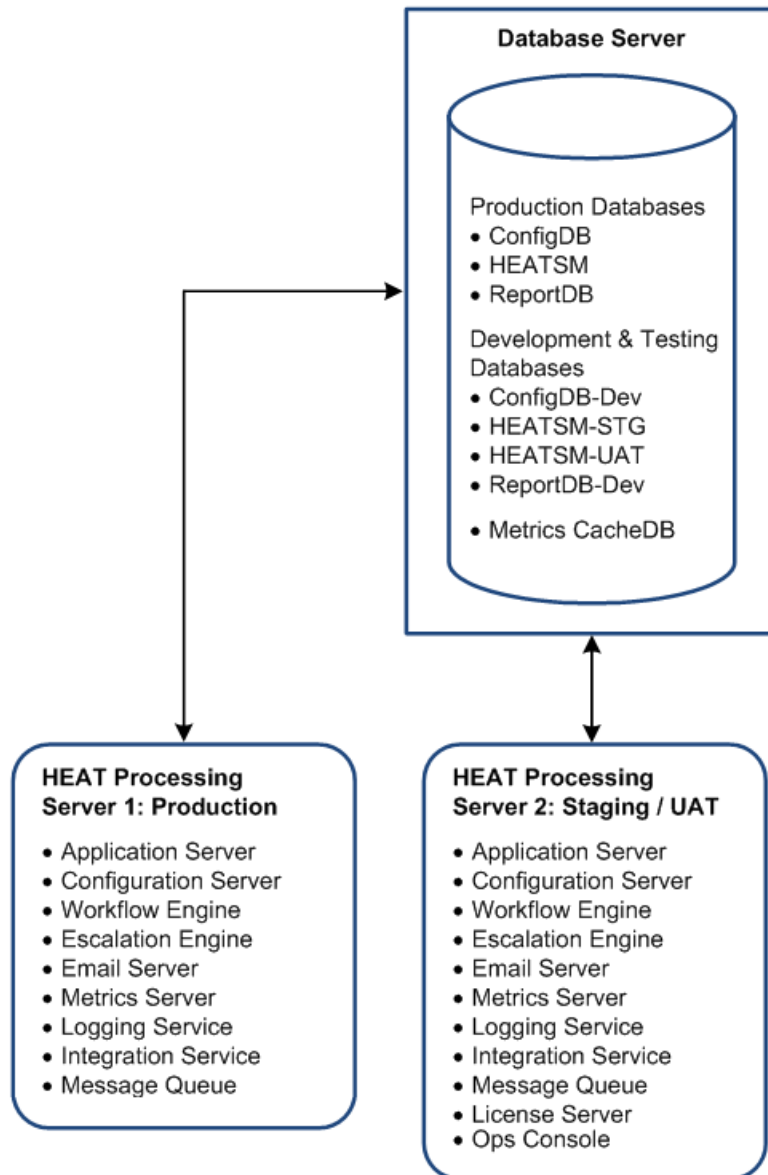
## **About the Ivanti Service Manager Operations Console Deployment Options**

- Determine your database deployment options first. In all of the Operations Console deployment options below, you can substitute any of the database deployments described in "Database Deployment Options" on page 19 for the database deployments in the figure. So for the database engine instance shown in Option OC1 below, you could substitute Option D1, Option D2a, Option D2b, Option D3, and so on for that database engine instance.
- To use the Operations Console, the production, staging, and UAT application servers must all use the same version of Ivanti Service Manager. When you test new versions of Ivanti Service Manager, either install the new version in a separate environment or plan the Operations Console pushes before testing the new version.
- We recommend using a deployment that has either two or three configuration databases, such as Option OC1, Option OC2, or Option OC3.

### **Option OC1: Separate Configuration Databases and Application Servers for Production and Development (Best Practice)**

You only install the Operations Console on the staging/UAT server. Do not install it on any other servers.

*Example of Separate Configuration Databases and Application Servers for Production and Development*

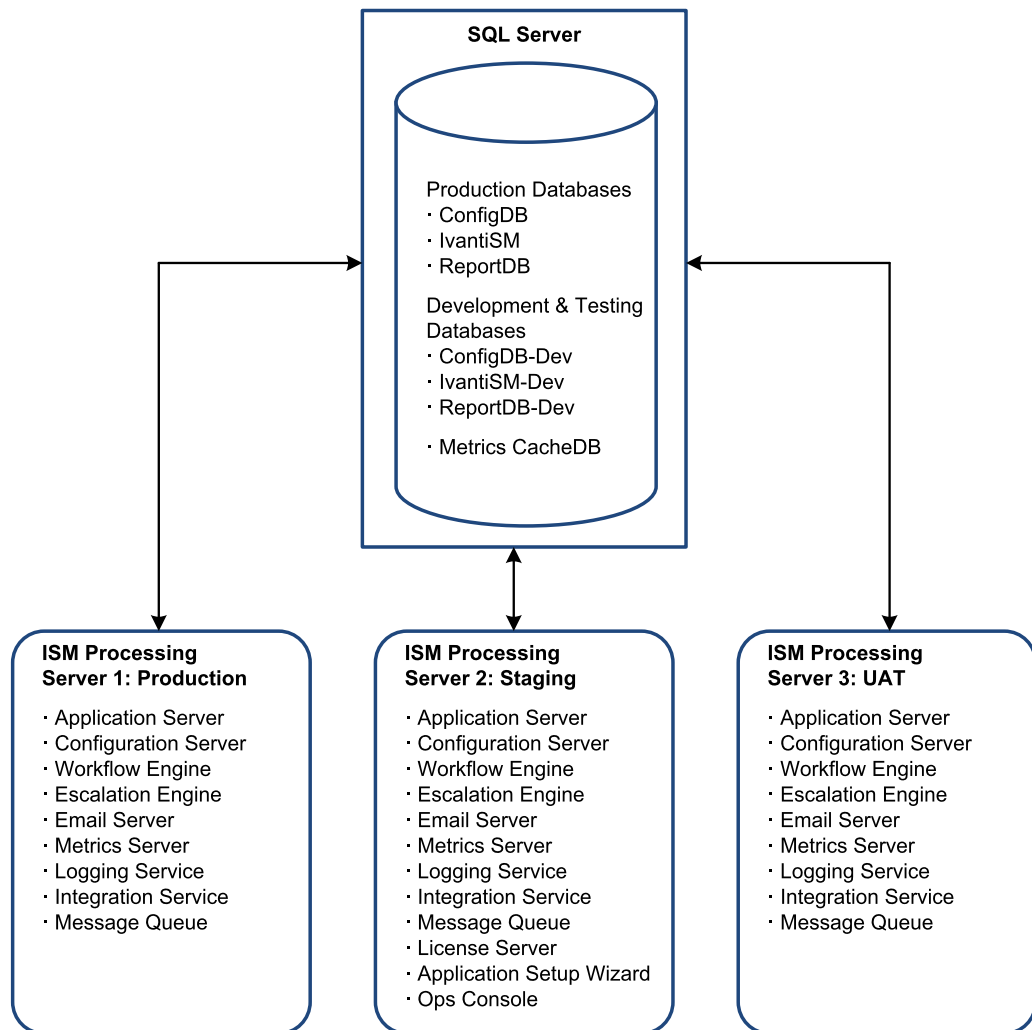


## Option OC2: Two Configuration Databases and Separate Application Servers for Each Landscape (Best Practice)

You only install the Operations Console on the staging server. Do not install it on any other servers.

*Example of Two Configuration Databases and Separate Application Servers for Each Landscape*





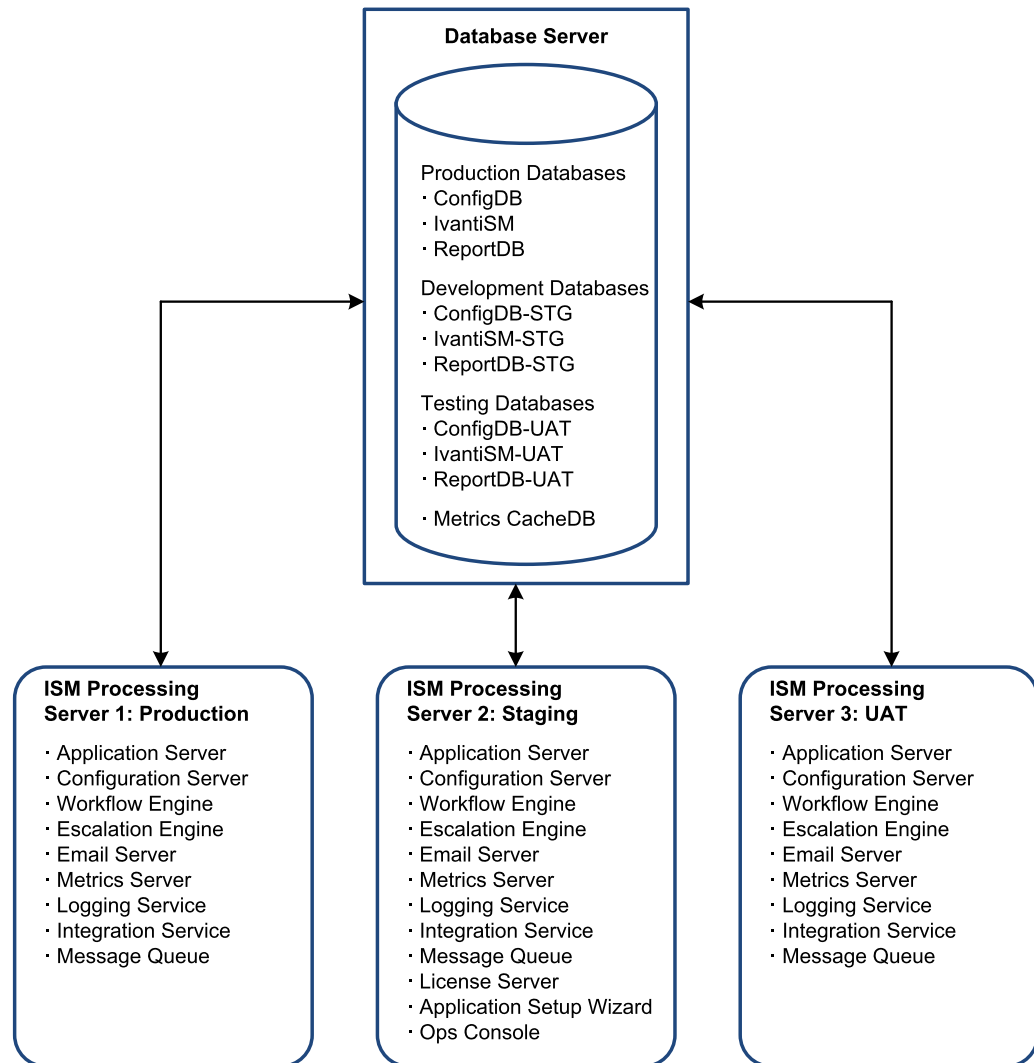
## Option OC3: Separate Configuration Databases for Each Landscape (Best Practice)



The only use case for this option is to upgrade the staging or UAT landscape at different times.

You only install the Operations Console on the staging server. Do not install it on any other servers.

*Example of Separate Configuration Databases for Each Landscape*

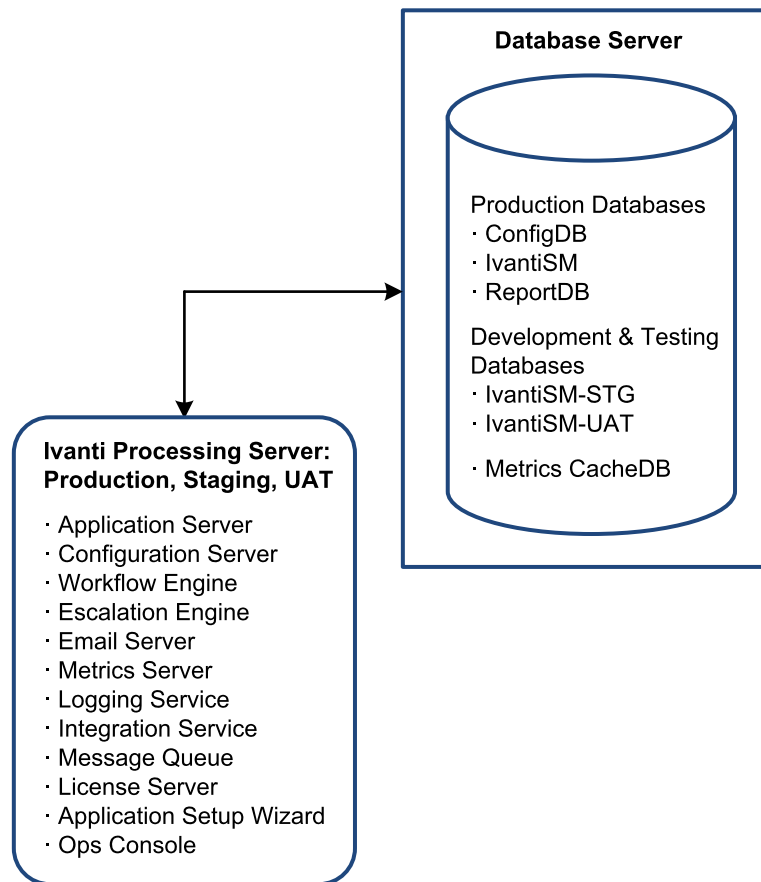


## Option OC4: One Configuration Database and One Application Server



We do not recommend using this or any similar deployment that has only one configuration database that is used for IvantiSM, IvantiSM-STG, and IvantiSM-UAT, unless you are setting up a demo environment. The reason for this only being viable for demo environments is that this deployment prevents you from being able to test future upgrades on development tenants without forcing production to upgrade at the same time.

*Example of One Configuration Database and One Application Server*



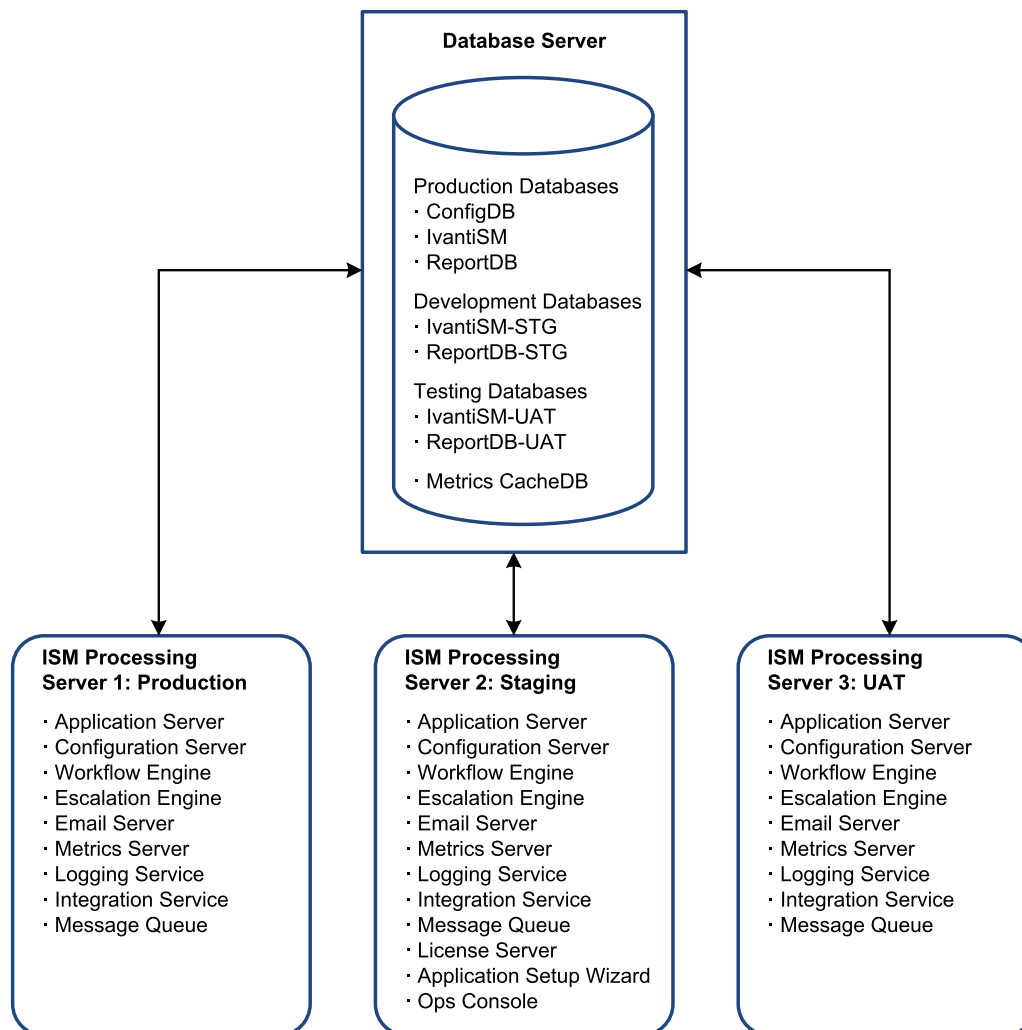
## Option OC5: One Configuration Database and Separate Application Servers for Each Landscape



We do not recommend using this or any similar deployment that has only one configuration database that is used for IvantiSM, IvantiSM-STG, and IvantiSM-UAT, unless you are setting up a demo environment. The reason for this only being viable for demo environments is that this deployment prevents you from being able to test future upgrades on development tenants without forcing production to upgrade at the same time.

You only install the Operations Console on the staging server. Do not install it on any other servers.

*Example of One Configuration Database and Separate Application Servers for Each Landscape*



## Reporting Services Deployment Options

- "About the Reporting Services Deployment Options" on the next page
- "Option R1: Multiple Microsoft SSRS Instances on the Same Database Server (Best Practice)" on the next page
- "Option R2: Separate Microsoft SSRS Instances and a Separate Database Server (Best Practice)" on page 34
- "Option R3: Separate Microsoft SSRS Instances" on page 35
- "Option R4: Multiple Microsoft SSRS Instances on a Separate Report Server" on page 36

- "Option R5: Single Microsoft SSRS Instance on One Database Server" on page 37

## About the Reporting Services Deployment Options

- Determine your database deployment options first (see "Database Deployment Options" on page 19), and then your Operations Console deployment options (see "Ivanti Service Manager Operations Console Deployment Options" on page 26). Then determine your reporting services deployment options.

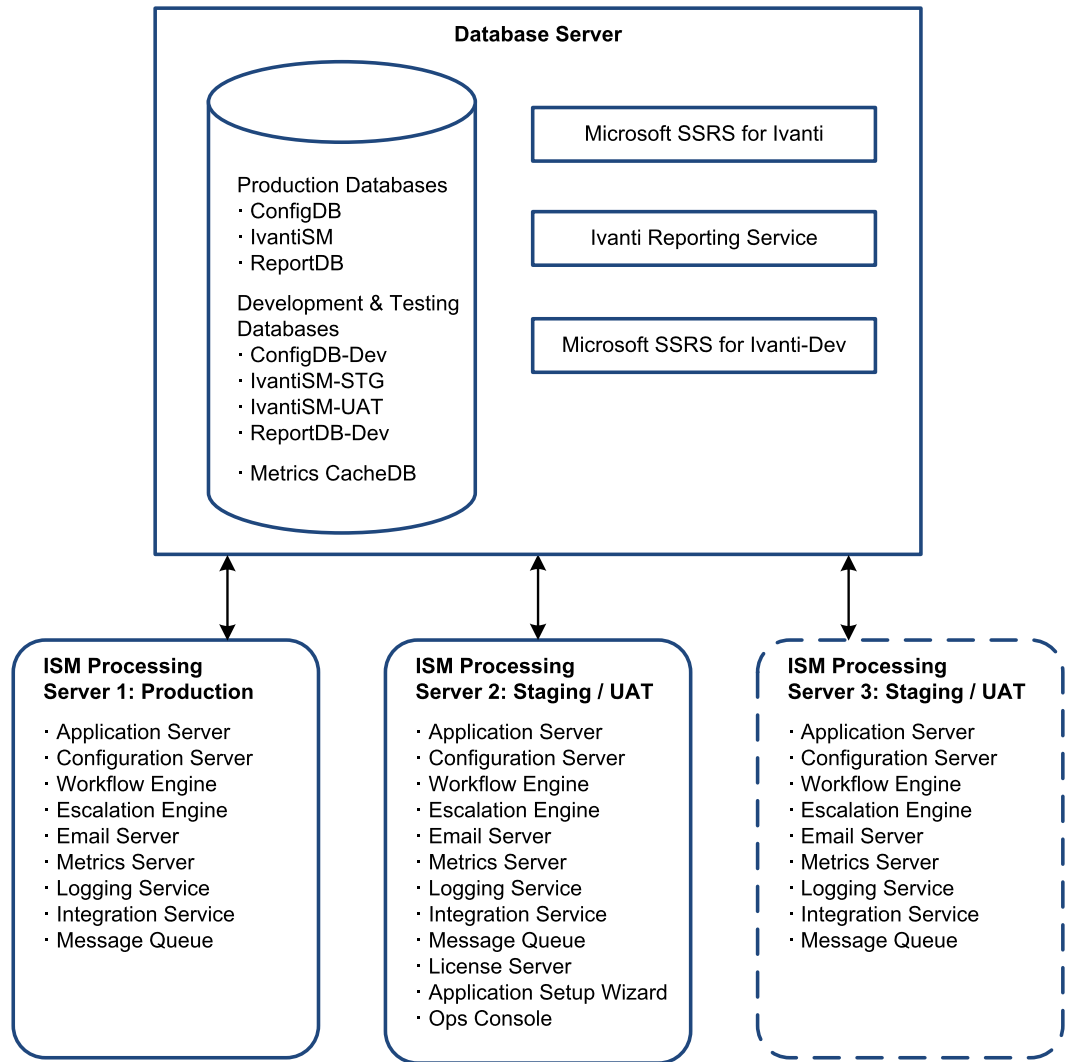
In all of the reporting services deployment options below, note the following:

- You can substitute any of the database deployments described in "Database Deployment Options" on page 19 for the database deployments in the figure. For example, for the database engine instance shown in Option R5 below, you could substitute Option D1, Option D2a/b, Option D3, and so on for that database engine instance.
- You can substitute any of the Operations Console deployments described in "Ivanti Service Manager Operations Console Deployment Options" on page 26 for the Operations Console deployments in the figure. For example, for the single application server shown in Option R5 below, you could substitute Option OC3 for that application server.
- The Ivanti Service Manager report database can reside on a separate database instance, or on a database instance on a separate server.
- The Microsoft SSRS instance can run on the Ivanti Service Manager database server, application server, or on a separate server.
- The reporting feature should be installed on the Microsoft SSRS Server.
- We recommend using either Option R1 or Option R2.

## Option R1: Multiple Microsoft SSRS Instances on the Same Database Server (Best Practice)

This deployment is the most common and recommended for simplicity and security. The advantage of this deployment is that you have a reporting feature for production that is separate from the development environments.

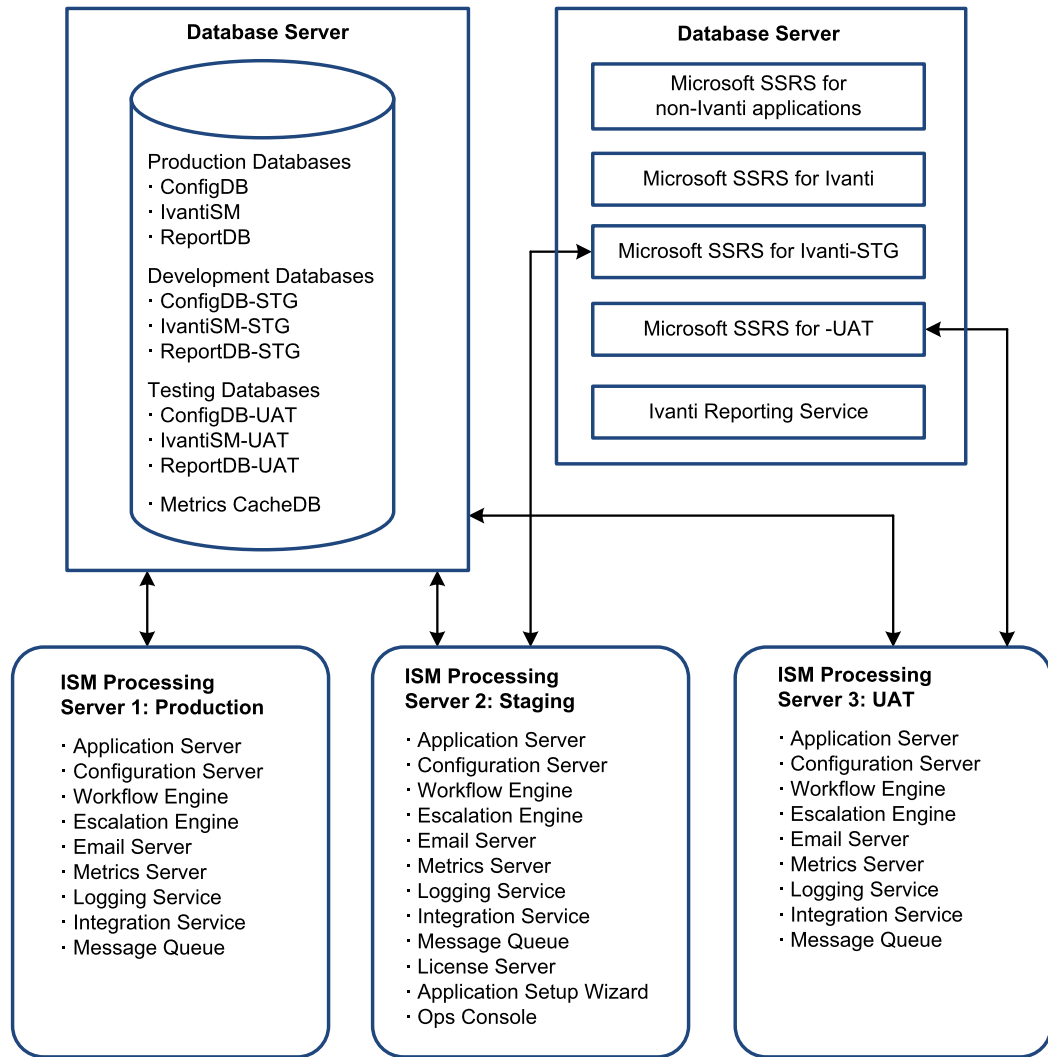
*Example of Multiple Microsoft SSRS Instance on One Database Server*



## Option R2: Separate Microsoft SSRS Instances and a Separate Database Server (Best Practice)

Use this deployment to keep the reporting separate between the production and development environments.

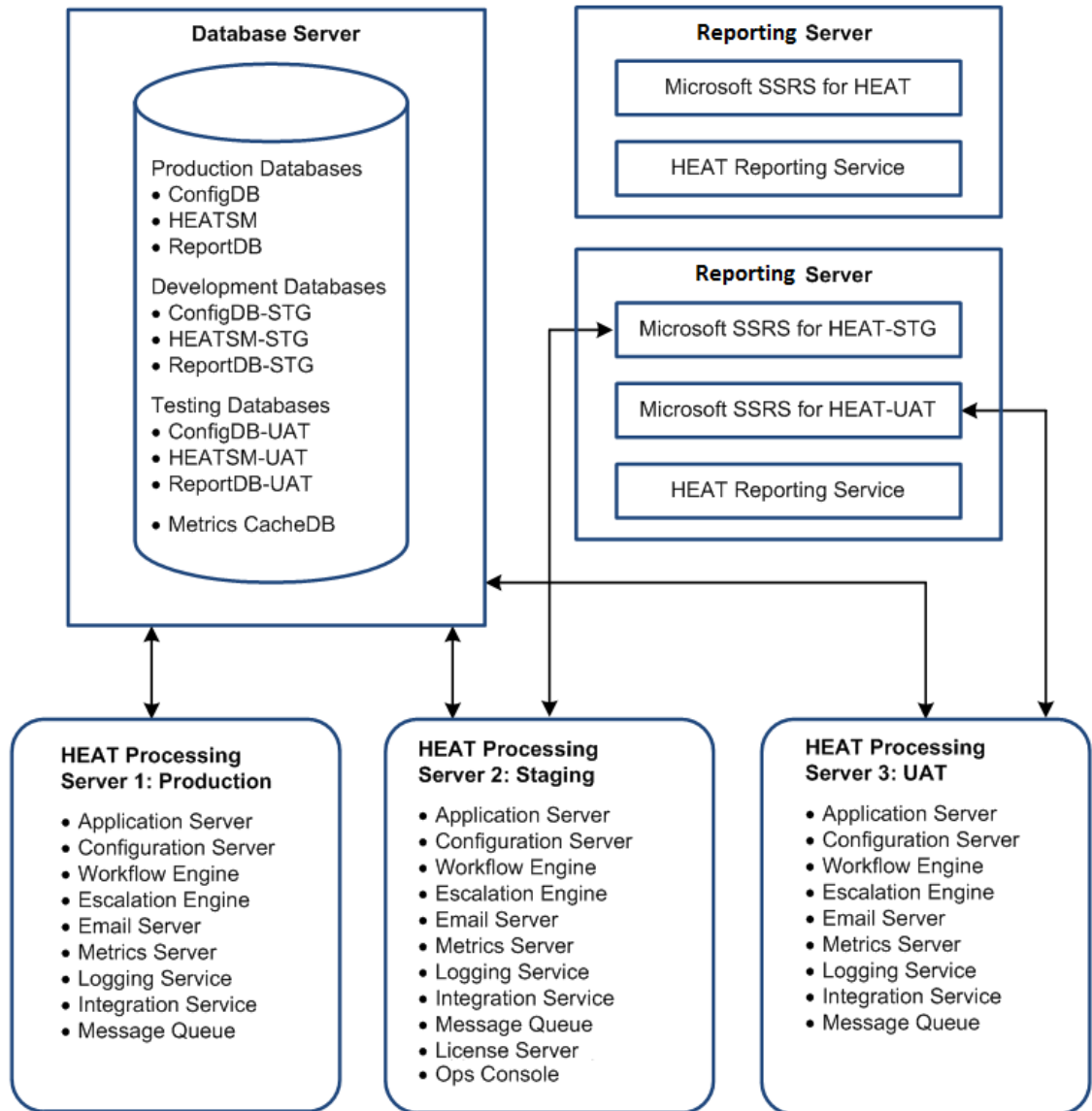
*Example of Separate Microsoft SSRS Instances and a Separate Database Server*



### Option R3: Separate Microsoft SSRS Instances

Use this deployment to keep the reporting separate between the production and staging/UAT environments.

*Example of Separate Microsoft SSRS Instances*

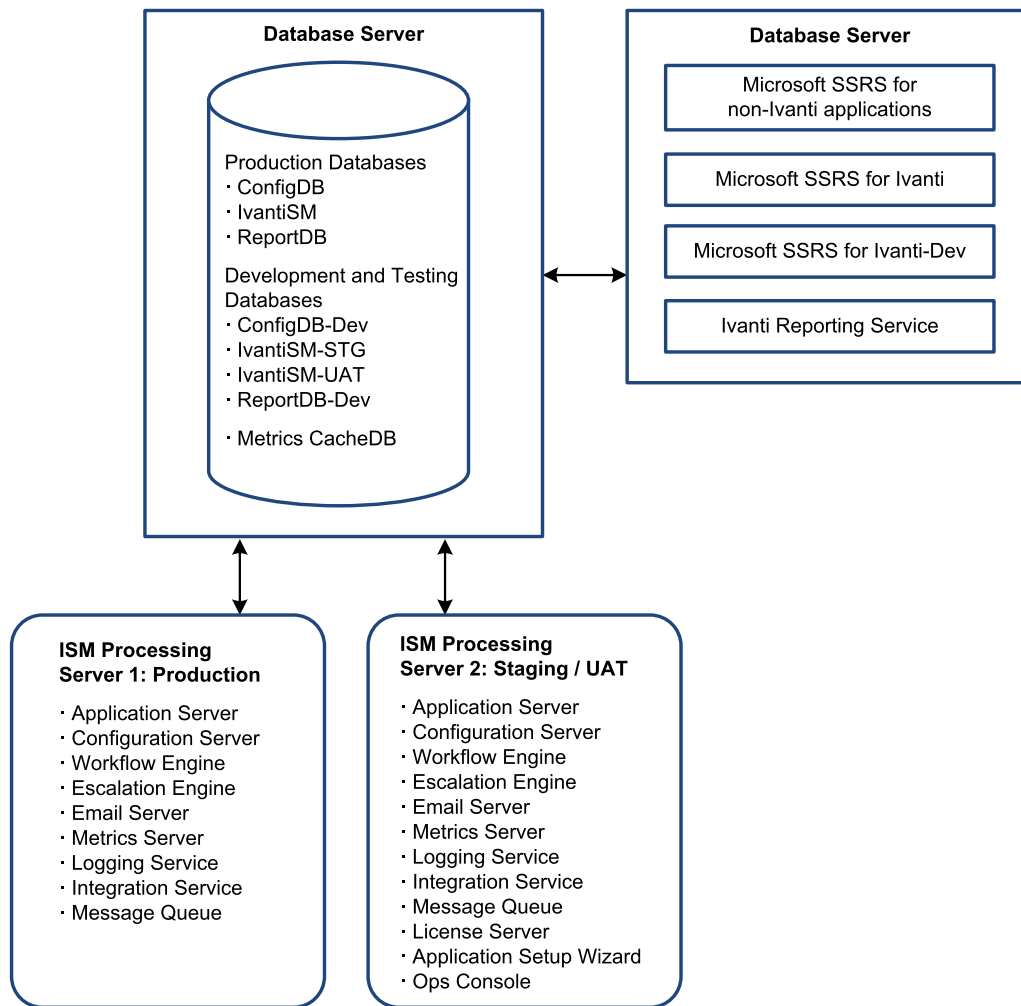


## Option R4: Multiple Microsoft SSRS Instances on a Separate Report Server

This deployment is recommended if you need to maintain your database in a locked down environment and keep it separate from the development environment. We also recommend this deployment if you already have a server with a Microsoft SSRS instance for other applications.

*Example of a Multiple Microsoft SSRS Instances on a Separate Report Server*



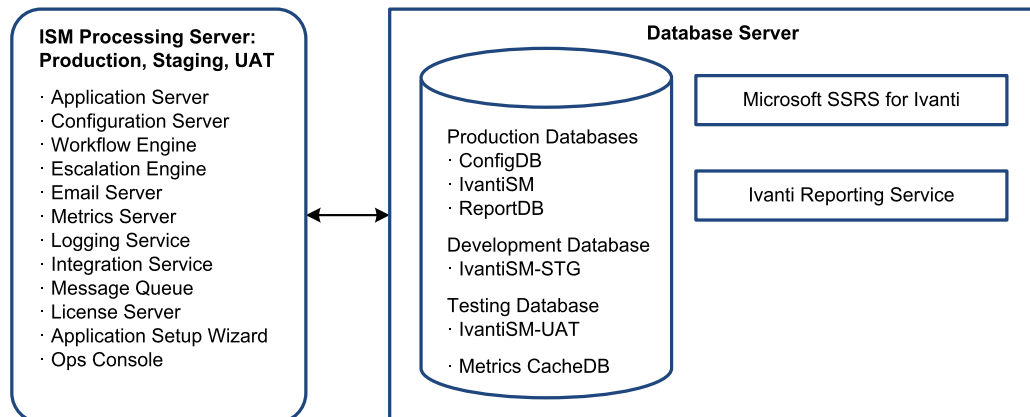


## Option R5: Single Microsoft SSRS Instance on One Database Server



We do not recommend using this deployment unless you are setting up a demo environment.

*Example of a Single Microsoft SSRS Instance on One Database Server*



## Voice Deployment Options

- "About Ivanti Voice" below
- "About this Deployment" below
- "Installing and Configuring Ivanti Voice" on page 40
- "Integrating Ivanti Voice with Ivanti Service Manager" on page 40

## About Ivanti Voice

Ivanti Voice is the telephony application that integrates automated call routing and management and computer telephone integration to Ivanti Software applications such as Ivanti Service Manager. Ivanti Voice uses the next-generation, standards-based IP communication transport, called Session Initiation Protocol (SIP). Ivanti Service Manager and Voice are typically installed and maintained on separate servers..

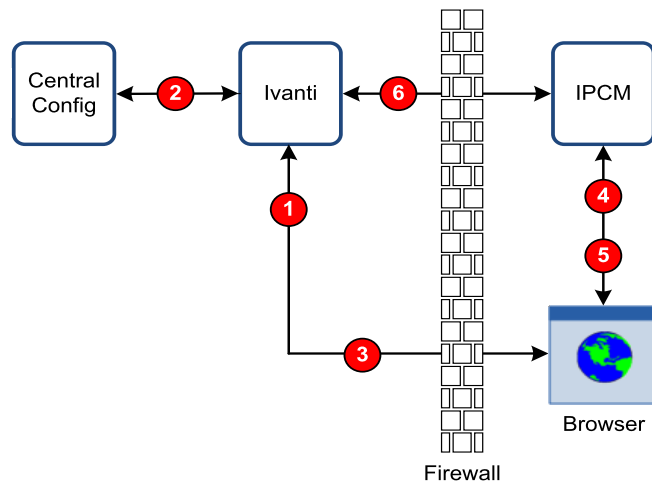
## About this Deployment

- "Agent Login Sequence" below
- "Incoming Call Sequence" on the next page

## Agent Login Sequence

"Agent Login Sequence" below shows the Voice agent login sequence.

*Agent Login Sequence*

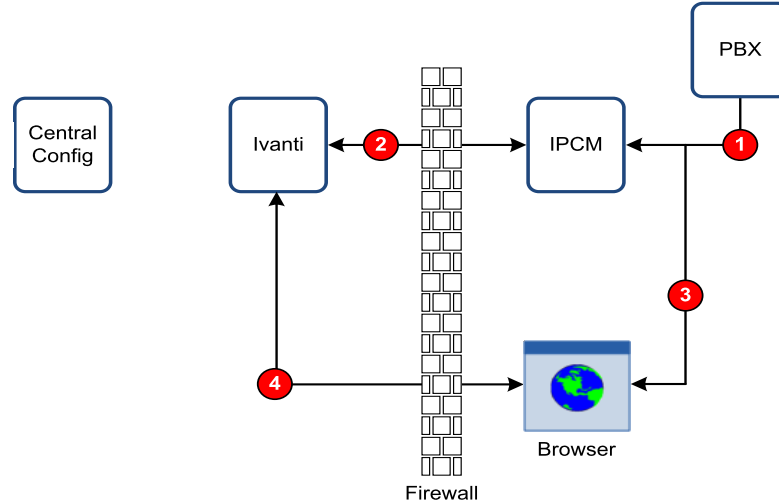


1. The agent logs into a secure (HTTPS) connection.
2. The system verifies the Voice server IP address or domain name.
3. The system obtains the session key from the Ivanti Voice server IP address or domain name.
4. The system verifies the session key (TCP 5743).
5. The system makes the phone connection (SIP UDP 5060).
6. The system validates the session key (HTTPS).

### Incoming Call Sequence

"Incoming Call Sequence" below shows the sequence of events for Ivanti Voice incoming calls.

*Incoming Call Sequence*



1. The system receives a call (SIP UDP 500).
2. The IVR searches and updates the record (HTTPS).
3. The call is forwarded to the agent (SIP UDP 5060, RTP UDP, TCP 5743).
4. The record appears to the agent (HTTPS).

## Installing and Configuring Ivanti Voice

For information about installing and configuring Ivanti Voice, see the *IP Communications Management Administrator Guide*.

## Integrating Ivanti Voice with Ivanti Service Manager

For complete information about integrating Voice with Ivanti Service Manager, see *Working with Voice* in the Ivanti Service Manager online help.

# Ivanti Service Manager Installation Prerequisites

Before you install Ivanti Service Manager, do the following:

- Confirm your role. See "About Roles" below.
- Create the needed accounts. See "About the Different Accounts Used in Ivanti Service Manager" on page 43.
- Meet the system, hardware, and software prerequisites. This information is contained in the *System Requirements and Compatibility Matrix for Ivanti Service Manager*.
- Configure the ports needed for your deployment. This information is contained in the *System Requirements and Compatibility Matrix for Ivanti Service Manager*.
- If you are going to deploy Ivanti Service Manager as a virtual image, review the requirements at "About Using a Virtual Machine with Ivanti Service Manager" on page 45.
- Ensure that the FILESTREAM feature is enabled on the Microsoft SQL Server. See "Okay Enabling Attachment File Streaming" on page 45.
- If you are going to deploy the reporting feature, ensure that Microsoft SQL Server Reporting Services (SSRS) is enabled. See "Prerequisites for Installing the Ivanti Service Manager Reporting Feature" on page 49.
- Enable full-text search for Microsoft SQL Server. See "Enabling Full-Text Search" on page 51.
- (Optional) Verify the server roles and features described in "Verifying Server Roles and Features (Optional)" on page 53.
- Determine the directories in which to install the Ivanti Service Manager components on the host that you are logged into.

## About Roles

- "Administrator Account Permissions" below
- "Database Access Rights Needed for Ivanti Service Manager" on the next page
- "Database Access Rights Needed for the Reporting Feature" on the next page

## Administrator Account Permissions

Use your account that has local administrator permissions to install Ivanti Service Manager, including all optional components. This administrator account must have permission to create and modify folders, files, and registry keys.

## Database Access Rights Needed for Ivanti Service Manager

The following are the minimum access rights required for the account of the user running the System Configuration Wizard:

| Role  | Access Right  |
|---|---------------|
| Server  | public        |
|   | dbcreator     |
|   | securityadmin |
| <p><b>NOTE:</b> This role is only needed temporarily, to assign the db_owner role to the configuration database and the Ivanti Service Manager databases.</p> |               |

If you do not want to give this permission to the user running the System Configuration Wizard, you must go into the Microsoft SQL Server Management Studio and manually assign the service account as the db\_owner for the configuration database and the Ivanti Service Manager databases.

## Database Access Rights Needed for the Reporting Feature

The following are the minimum access rights used in Microsoft SQL Server Management Studio for Ivanti Service Manager when also using the reporting feature:

| Role     | Access Right       |
|----------|--------------------|
| Server   | public             |
|          | dbcreator          |
|          | securityadmin *    |
| Database | db_owner of master |
|          | db_owner of msdb   |

\* The securityadmin role, and the db\_owner of the master Microsoft database, are only needed if you set up Microsoft SSRS and create a new report server database. If you have already configured Microsoft SSRS and do not make any changes to it, you do not need this role.

The securityadmin role creates the following Microsoft SSRS-related roles in the master, msdb, report server, and report server temporary databases:

RSExecRole

SQLAgentOperatorRole

SQLAgentReaderRole

SQLAgentUserRole

The service account for Microsoft SSRS requires:

| Database                | Role                 |
|-------------------------|----------------------|
| MSDB                    | RSExecRole           |
|                         | SQLAgentOperatorRole |
|                         | SQLAgentReaderRole   |
|                         | SQLAgentUserRole     |
| Master                  | RSExecRole           |
| Report server           | RSExecRole           |
|                         | db_owner             |
| Report server temporary | RSExecRole           |
|                         | db_owner             |

## About the Different Accounts Used in Ivanti Service Manager

Before you install and configure Ivanti Service Manager, you must create and know the credentials for the following accounts:

- "IT Account" below
- "Database Account " on the next page
- "Service Account" on the next page

During configuration of Ivanti Service Manager, you create the following accounts:

- "Administrator Account for the Configuration Database" on the next page
- "Administrator Account for Ivanti Service Manager" on page 45
- "Administrator Account for the Reporting Service" on page 45
- "Administrator Account for the Operations Console" on page 45

### IT Account

This is the account that you are logged into when installing Ivanti Service Manager and running the System Configuration Wizard.

You must create this account before you start the installation. This account must have administrator privileges on the servers on which you install Ivanti Service Manager. Your IT department sets up this account for you.

## Database Account

You must create this account before you start the installation.

You enter your credentials for the Ivanti Service Manager database account on the following System Configuration Wizard pages:

- **Configuration Application**
- **Ivanti Service Manager Application**
- **Metrics Server**
- **Ivanti Discovery Application Server**

If you plan on installing the reporting feature, you also enter your credentials for the Ivanti Service Manager database account on the following System Configuration Wizard pages:

- **Microsoft SSRS Configuration**
- **Reporting Service Configuration**

## Service Account

You must create this account before you start the installation and configuration and it must have administrator privileges on the Ivanti Service Manager application server.

A Ivanti Service Manager service account is only required when you:

- Do not use the local system account for the Microsoft IIS application pool identity and Windows service.
- Install the reporting feature.

You enter your credentials for the Ivanti Service Manager service account on the following System Configuration Wizard pages:

- **Ivanti Application Server Settings**
- **Microsoft SSRS Configuration**

## Administrator Account for the Configuration Database

This account enables you to log into the configuration database.

You create this account during system configuration on the **Configuration Application** page of the System Configuration Wizard.

There will probably be different accounts used for different tenants.



## Administrator Account for Ivanti Service Manager

This account enables you to log into Ivanti Service Manager, with access to the Service Desk Console and Configuration Console.

You create this account during system configuration on the **Ivanti Service Manager Application** page of the System Configuration Wizard.

There will probably be different accounts used for different tenants.

## Administrator Account for the Reporting Service

This account enables you to log into the reporting feature.

You create this account during system configuration on the **Reporting Service Configuration** page of the System Configuration Wizard.

## Administrator Account for the Operations Console

This account enables you to log into the Operations Console.

You create this account during system configuration when you check **Use this host for Operations Console** on the **Ivanti Application Server Settings** page of the System Configuration Wizard.

## About Passwords Used in Ivanti Service Manager

We recommend that you follow industry standards for creating strong passwords.

See <https://msdn.microsoft.com/en-us/library/ms161962.aspx> and <https://msdn.microsoft.com/en-us/library/ms161959.aspx>.

## About Using a Virtual Machine with Ivanti Service Manager

You can also deploy Ivanti Service Manager as a virtual image. If you use a virtual machine, always keep the same universally unique identifier (UUID). See your virtual machine documentation for more information.

## Okay Enabling Attachment File Streaming

- "About Enabling Attachment File Streaming" on the next page
- "Task 1: Enabling the FILESTREAM Feature" on the next page
- "Task 2: Setting up Ivanti Service Manager" on page 48
- "Task 3: Running the File Stream Attachment Script" on page 49

## About Enabling Attachment File Streaming

Microsoft SQL Server 2008 and later versions come with enhanced support for unstructured data in the form of the FILESTREAM data type, which stores unstructured data files in the NTFS file system while storing the metadata about the unstructured data files in the Microsoft SQL Server database. For more information, see [https://technet.microsoft.com/en-us/library/bb933993\(v=sql.105\).aspx](https://technet.microsoft.com/en-us/library/bb933993(v=sql.105).aspx).

Beginning with Release 2016.1.1, Ivanti Service Manager supports the FILESTREAM attachment type when you perform the tasks below.



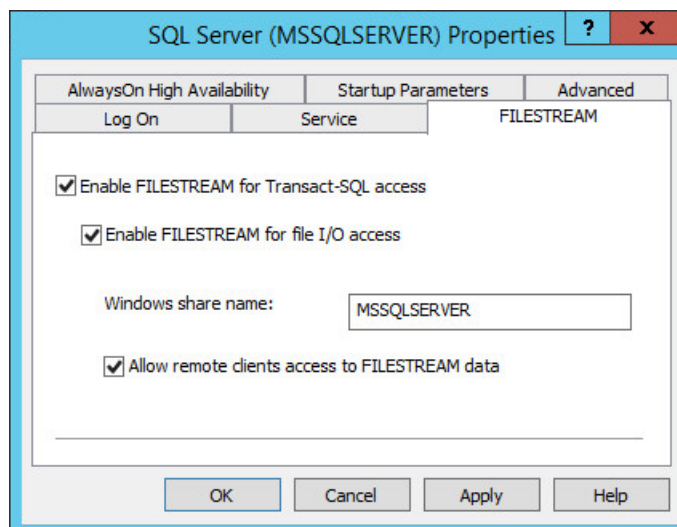
This procedure is only required for deployments that store FILESTREAM attachments.

### Task 1: Enabling the FILESTREAM Feature

You must enable the FILESTREAM feature on the Microsoft SQL Server instances where you plan to install the configuration database and the Ivanti Service Manager application database. The database administrator normally performs this task.

1. On the database server, go to the Windows apps menu and click **SQL Server Configuration Manager**.
2. Navigate to the **SQL Server Services** node and double-click the Microsoft SQL Server instance to modify. For example, select **SQL Server (MSSQLSERVER)**.

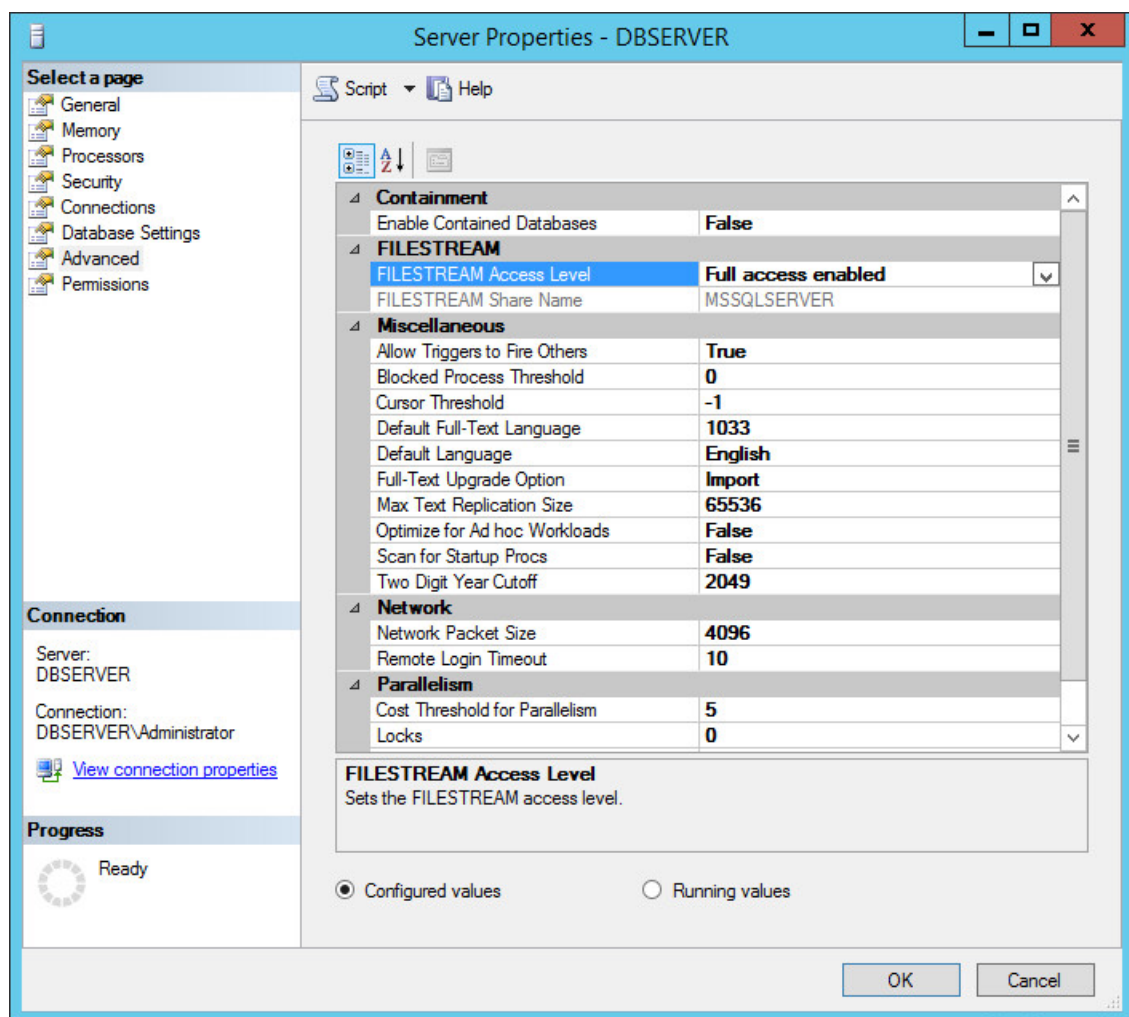
*Microsoft SQL Server Properties Dialog Box*



3. Click the **FILESTREAM** tab.
4. Check **Enable FILESTREAM for Transact-SQL access** and **Enable FILESTREAM for file I/O access**.
5. Enter a Windows share name for the files.
6. Check **Allow remote clients access to FILESTREAM data**.

7. Click **OK**.
8. On the database server, go to the Windows apps menu and click **SQL Server Management Studio**.
9. In Microsoft SQL Server Management Studio, connect to the database server.
10. Right-click the server and choose **Properties** from the pop-up menu.
11. Under **Select a page**, click **Advanced**.
12. Double-click the entry called **FILESTREAM Access Level** until it displays **Full access enabled**.
13. Click **OK**.
14. (Optional) If you see a restart required message, restart the Microsoft SQL Server.

*Microsoft SQL Server Properties*



## Task 2: Setting up Ivanti Service Manager

The Ivanti Service Manager application database and the configuration database are Microsoft SQL databases. On Microsoft SQL databases, user accounts with the db\_owner fixed database role can perform all configuration and maintenance activities on the database.

These steps are in addition to those described under "Configuring Ivanti Service Manager " on page 76.

1. On the database server, go to the Windows apps menu and click **System Configuration Wizard**.
2. On the **Configuration Application** page, specify a configuration database user account that has a db\_owner role on Microsoft SQL Server. This is for the **User Name** field. See "Configuring the Configuration Database" on page 77.
3. When you create a new configuration database, specify the directory path to the MDF and LDF database files.

*Creating a New Configuration Database*

**New Database**

Configuration Database Name: ConfigDB

Configuration Database Location: C:\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\DATA

Collation: <Server Default>

^ **Advanced Options**

Database files

| Logical Name | File Type | Initial Size(MB) | Autogrowth                    | Path   |
|--------------|-----------|------------------|-------------------------------|--|
| ConfigDB     | Rows Data | 100              | By 10MB. Unrestricted growth. | C:\Program Files\Microsoft SQL Server\MSSQL12. |
| ConfigDB_log | Log       | 1                | By 10%. Unrestricted growth.  | C:\Program Files\Microsoft SQL Server\MSSQL12. |

OK Cancel

4. On the **Ivanti Service Manager Application** page, specify a Ivanti Service Manager application database user account that has a db\_owner role on Microsoft SQL Server. This is for the **User Name** field. See "Configuring the Ivanti Service Manager Application" on page 83.

5. When you create a new Ivanti Service Manager application database, specify an additional path to the server.

### **Task 3: Running the File Stream Attachment Script**

The FileStreamAttachment.sql script is included on the Software product CD. The script creates an attachment filestream database file group and a filestream.

Before you run the script, open it in Microsoft SQL Server Management Studio and read the script notes carefully, so that you understand what the script does.

1. On the Microsoft SQL Server hosting the configuration database, run the FileStreamAttachment.sql script.
2. On the Microsoft SQL Server hosting the Ivanti Service Manager application database, run the FileStreamAttachment.sql script.

When you create your Ivanti Service Manager application database, you can now specify the FILESTREAM attachment type. See "Configuring the Ivanti Service Manager Application" on page 83.

## **Prerequisites for Installing the Ivanti Service Manager Reporting Feature**

- "About Microsoft SSRS" below
- "Checking if Microsoft SSRS is Installed" below
- "Installing Microsoft SSRS" on the next page

### **About Microsoft SSRS**

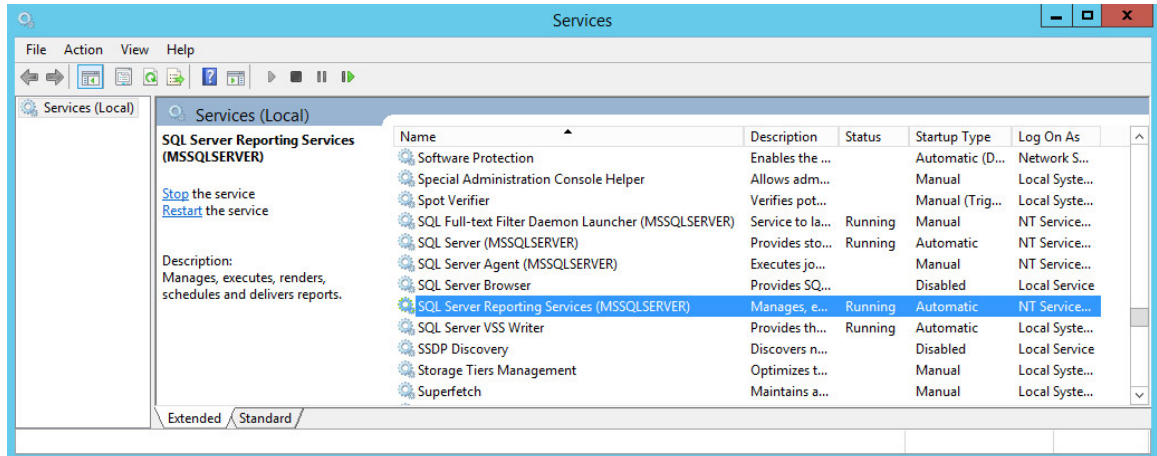
The Ivanti Service Manager reporting feature requires that the 64-bit version of Microsoft SQL Server and Microsoft SQL Server Reporting Services (SSRS) are installed and running on the Ivanti Service Manager database server. The reporting feature does not support the 32-bit version of Microsoft SQL Server and Microsoft SQL Server Reporting Services (SSRS).

### **Checking if Microsoft SSRS is Installed**

To verify that Microsoft SSRS is installed on your system, do the following:

1. Open the Microsoft Windows **Services** dialog box and look for an entry called SQL Server Reporting Services.

*Windows Services Dialog Box*



The name in parentheses is the Microsoft SSRS instance name. See "Windows Services Dialog Box" on the previous page. During the reporting feature configuration, you must enter this instance name.

The instance name cannot contain any special characters, such as \, :, ; ... and so on. The instance names can contain \$ and \_. See <https://technet.microsoft.com/en-us/library/aa176590%28v=sql.80%29.aspx>.



If the names of the current Microsoft SSRS instances have special characters, you must install an additional Microsoft SSRS instance with an instance name free of special characters.

2. Choose the appropriate action:
  - If Microsoft SSRS is already installed and the instance name (the name in parentheses) has no special characters ( -, \_ , #, and so on), make sure that:
    - The value in the **Status** column is set to **Running**.
    - The value in the **Startup Type** column is set to either **Automatic** or **Automatic (Delayed Start)**.
  - If Microsoft SSRS is already installed but the instance name has special characters ( -, \_ , #, and so on), use the Microsoft SQL Server Installation Center to add a new Microsoft SSRS instance with an instance name free of special characters.
  - If Microsoft SSRS is not installed, use the Microsoft SQL Server Installation Center to add a Microsoft SSRS component to an existing Microsoft SQL installation.

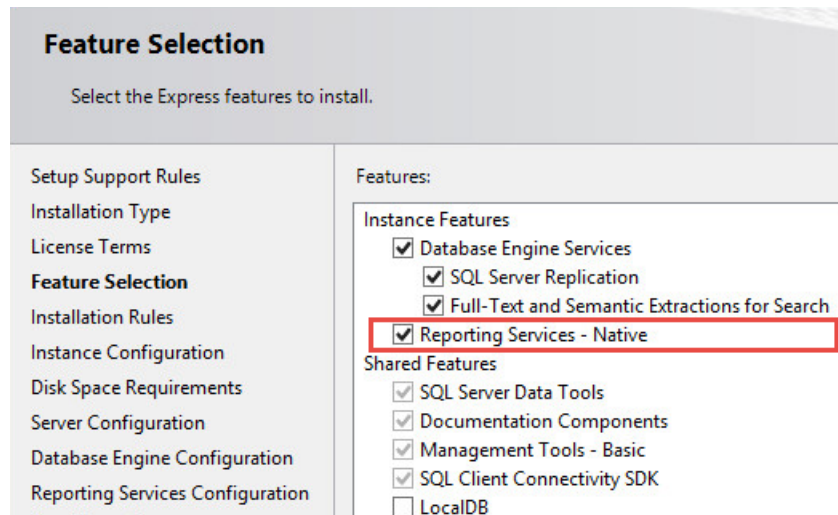
## Installing Microsoft SSRS

Microsoft SQL Server Reporting Services (SSRS) is an optional installation feature of Microsoft SQL Server. It is a server-based, report-generating software system.

The Microsoft SSRS feature is disabled by default. This section describes how to enable and configure the Microsoft SSRS feature of Microsoft SQL Server.

1. During Microsoft SQL Server installation, in the **Feature Selection** page of the Microsoft SQL Server setup wizard, check **Reporting Services - Native**.

*Checking Reporting Services - Native*



2. As you work your way through the Microsoft SQL Server setup wizard, verify that **Reporting Services - Native** is part of the server configuration.
3. When the installation is complete, go back to Windows Services and verify that Microsoft SQL Server Reporting Services is present. See "Checking Reporting Services - Native" above.

With Microsoft SSRS present and running, the database server is ready for you to install and configure Ivanti Service Manager.

## Enabling Full-Text Search

- "About Full-Text Search" below
- "Enabling the Full-Text Search Feature" on the next page

### About Full-Text Search

The full-text search feature of Microsoft SQL Server is a specialized indexing and querying service for character-based data in Microsoft SQL Server database tables.

By default, the application database is configured to index these incident fields:

- Owner
- ProfileFullName
- Resolution

- Subject
- Symptom

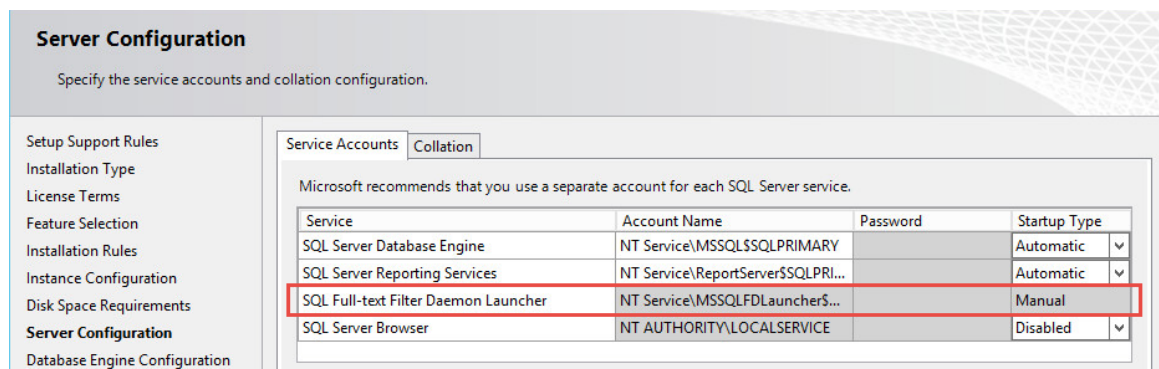
The full-text search feature is disabled by default.

## Enabling the Full-Text Search Feature

This section describes how to enable and configure the full-text search feature of Microsoft SQL Server.

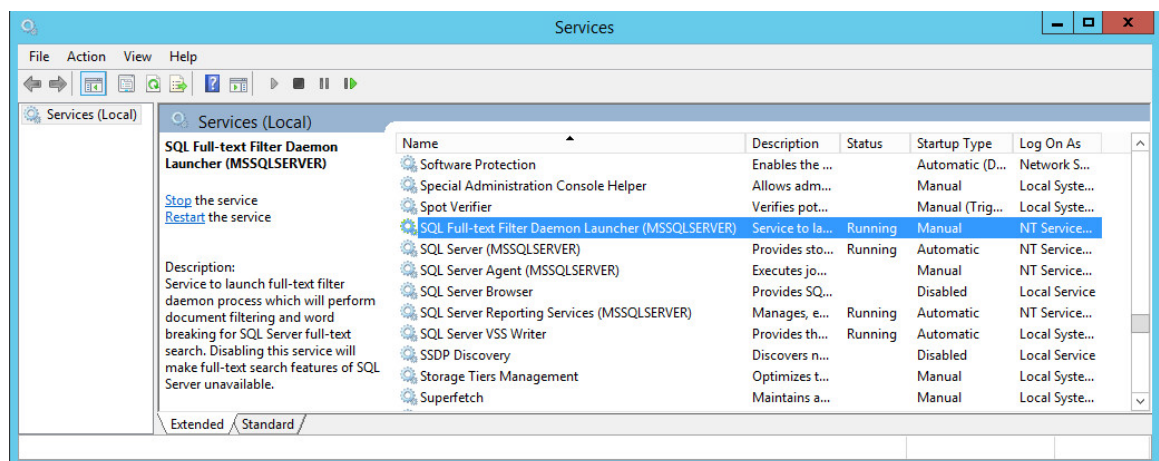
1. During Microsoft SQL Server installation, in the **Feature Selection** page of the Microsoft SQL Server setup wizard, check **Full-Text and Semantic Extractions for Search**.
2. In the **Server Configuration** page of the Microsoft SQL Server setup wizard, ensure that the **Microsoft SQL Full-text Filter Daemon Launcher** is configured with the local service account.

*Server Configuration*



3. In the **Services** panel for the system, ensure that the status for **SQL Full-text Filter Daemon Launcher** says Running.

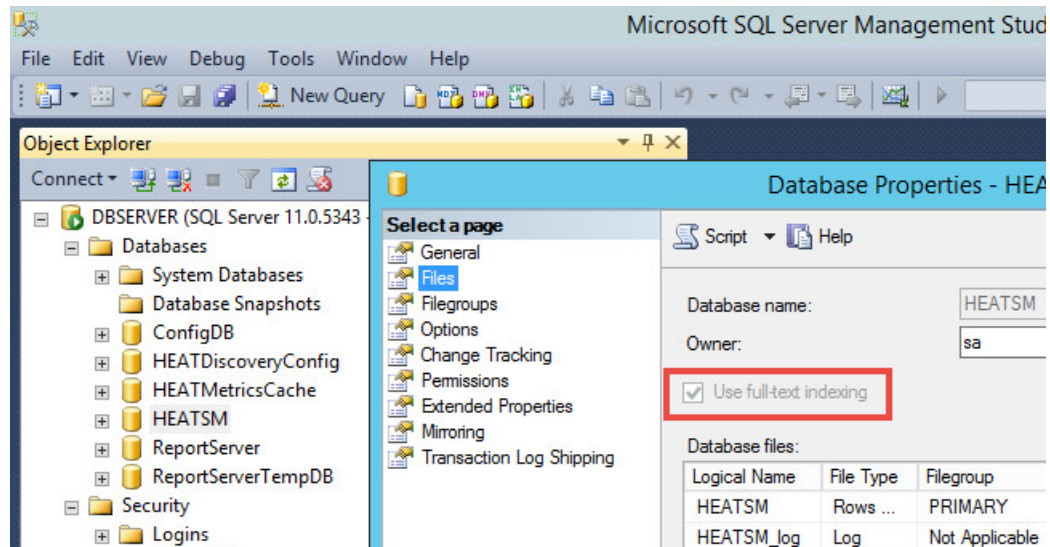
*Services Dialog Box*





4. Verify that full-text search is configured in Microsoft SQL Server Management Studio by doing the following:
  - a. Open the **Files** page from the **Database Properties** dialog box.
  - b. Ensure that **Use full-text indexing** is checked.
  - c. If it is not checked, verify that the full-text search services are running as described in "In the Services panel for the system, ensure that the status for SQL Full-text Filter Daemon Launcher says Running." on the previous page

*Checking the Use Full-Text Indexing Option*



## Verifying Server Roles and Features (Optional)

You can optionally verify which server roles and features are installed by the Ivanti Service Manager installer.

- If you install Ivanti Service Manager on Windows Server 2008 R2, verify the Microsoft IIS Release 7.5 configuration. See "Verifying Windows Server 2008 R2 Roles and Features" below.
- If you install Ivanti Service Manager on Windows Server 2012, verify the Microsoft IIS Release 8.0 configuration. See "Verifying Windows Server 2012 Roles and Features" on page 55.

## Verifying Windows Server 2008 R2 Roles and Features

1. Go to the **Start** menu and click **Administrative Tools > Server Manager**.
2. In the **Navigation** pane, expand **Roles > Web Server (IIS)**.
3. Verify that these role services are installed under the **Web Server** section:
  - Common HTTP features
  - Static Content

- Default Document
- Directory Browsing
- HTTP Errors
- Application Development
  - ASP.NET
  - .NET Extensibility
  - ISAPI Extensions
  - ISAPI Filters
- Health and Diagnostics
  - HTTP Logging
- Security
  - Request Filtering
- Performance
  - Static Content Compression
  - Dynamic Content Compression
- Management Tools
  - IIS Management Console

Check the box of any listed server role that is not installed.

4. In the **Navigation** pane, expand **Features > Add Features**.
5. Verify that these items are selected for .NET Framework features:
  - ASP.NET 4.5
  - WCF Services
    - HTTP Activation
  - Windows Process Activation Service
    - Process Model
    - Configuration APIs

Check the box of any listed feature that is not installed.

6. Click **Next** and then click **Install**.

## Verifying Windows Server 2012 Roles and Features

1. Go to the Windows apps menu and click **Server Manager**.
2. Under configure this local server, click **Add roles and features**.
3. On the **Roles** page, verify that these server roles are installed under **Web Server (IIS) > Web Server**:

- Common HTTP features
  - Default Document
  - Directory Browsing
  - HTTP Errors
  - Static Content
- Health and Diagnostics
  - HTTP Logging
- Performance
  - Static Content Compression
  - Dynamic Content Compression
- Security
  - Request Filtering
- Application Development
  - .NET Extensibility
  - ASP.NET
  - ISAPI Extensions
  - ISAPI Filters

Under Web Server (IIS) > Management Tools:

- IIS Management Console

Check the box of any listed server role that is not installed.

4. On the **Features** page, verify that these features are selected:
  - NET Framework 4.5
  - ASP.NET 4.5

- WCF Services > HTTP Activation
- Windows Process Activation Service
  - Process Model
  - Configuration APIs

Check the box of any listed feature that is not installed.

5. Click **Next** and then click **Install**.

# Installing the Ivanti Service Manager System

- "Installation Overview" below
- "Installing Ivanti Service Manager" on the next page
- "Installing the Reporting Feature" on page 60
- "Installing Discovery on a Dedicated Server" on page 62

## Installation Overview

This section describes how to install Ivanti Service Manager for a new, complete system using the recommended deployment as described in "Ivanti Service Manager Deployment Overview" on page 7.

- "Installing Ivanti Service Manager in the Production Environment" below
- "Installing Ivanti Service Manager in the Staging and UAT Environments" below
- "Installing the Reporting Feature" on the next page
- "Installing the Ivanti Service Manager Operations Console" on the next page

## Installing Ivanti Service Manager in the Production Environment

To install Ivanti Service Manager in the production environment, do the following:

- Install all Ivanti Service Manager features except for the Operations Console. See "Installing Ivanti Service Manager" on the next page.
- Use the System Configuration Wizard to configure your production environment. See "Configuring Ivanti Service Manager " on page 76.

## Installing Ivanti Service Manager in the Staging and UAT Environments

- If you are hosting the staging and UAT environments on one server, follow the steps below.
- If you are hosting the staging and UAT environments on separate servers, follow the steps below once for the staging environment and once for the UAT environment.

To install Ivanti Service Manager in the staging and UAT environments, do the following:

- Install all Ivanti Service Manager features including the Operations Console. See "Installing Ivanti Service Manager" on the next page.



If you are hosting the staging and UAT environments on separate servers, we recommend only installing the Operations Console on the staging server and not on both.

---

- Use the System Configuration Wizard to configure your staging and UAT environments. See "Configuring Ivanti Service Manager " on page 76.

## Installing the Reporting Feature

To install the reporting feature, do the following:

- Install the reporting feature on the Ivanti Service Manager database server. See "Installing the Reporting Feature" on page 60.
- Use the System Configuration Wizard to configure the reporting feature. See "Configuring the Reporting Feature" on page 113.

## Installing the Ivanti Service Manager Operations Console

You use the Ivanti Service Manager Operations Console to create the staging and UAT instances of the tenant. (The system automatically created the production instance of the tenant.)

If you have any problems with the installation, you can review the installation log file that resides with the other system temporary files in the system temporary folder at %tmp%.

See "Configuring the Deployment on the Ivanti Service Manager Operations Console" on page 124.

## Installing Ivanti Service Manager

- "Where to Install Ivanti Service Manager" below
- "Installing Ivanti Service Manager" on the next page

## Where to Install Ivanti Service Manager

Before you begin installation, be clear on your deployment plan for Ivanti Service Manager. See "Ivanti Service Manager Deployment Overview" on page 7.

- For the "Demonstration or Proof-of-Concept Deployment" on page 7, you install Ivanti Service Manager onto the Ivanti Service Manager server. With this deployment, you must install Microsoft SQL Server and Microsoft SQL Server Reporting Services (SSRS) on your server before you install Ivanti Service Manager.
- For the "Minimum Production Deployment " on page 9, you install Ivanti Service Manager onto the Ivanti Service Manager server.

- For the "Enterprise Production Deployment" on page 11, you install Ivanti Service Manager onto each of your Ivanti Service Manager processing servers and web servers, as described below.

## Installing Ivanti Service Manager

Installation is basically the same for all hosts in your deployment, except for the features to be installed, which happens in "Your selection of features from the Setup Type dialog box depends on the role of the individual host in your deployment plan." below

Do the following on each production server in your deployment:

1. Access the installation folder on the Software product CD or zip file and run IvantiServiceManager.exe. Right-click and select **Run as Administrator** to ensure proper installation.  
  
The installer checks for the prerequisite software components. If any of those components is not installed, the system prompts you to install them now.
2. Click **Install** at the prompt. Installation of the prerequisite software can take several minutes. If you are prompted to restart the system, click **Yes**. The system displays the **Welcome** dialog box. The installer checks for space and other requirements before displaying the **Next** button.
3. Click **Next**. The system displays the **License Agreement** dialog box.
4. Choose **I accept the terms in the license agreement** and click **Next**. The system displays the **Destination Folder** dialog box.
5. Click **Next** to accept the default installation folder, or click **Change** and select a different folder. The system displays the **Setup Type** dialog box.
6. Your selection of features from the **Setup Type** dialog box depends on the role of the individual host in your deployment plan.
  - For the "Demonstration or Proof-of-Concept Deployment" on page 7, choose **Complete**, click **Next**, and install all components.
  - For the "Minimum Production Deployment " on page 9, choose **Complete**, click **Next**, and install all components.
  - For the "Enterprise Production Deployment" on page 11, your choice depends on the role of the host:
    - **Production processing server**: Choose **Custom**, click **Next**, and install all components except for the Ivanti Service Manager Operations Console. You must install this server first before you install the staging, UAT, or web servers.
    - **Staging or UAT processing servers**: Choose **Complete**, click **Next**, and install all components.

- **Web servers:** Choose **Custom**, click **Next**, and only install the Ivanti Service Manager application server.

For the "Enterprise Production Deployment" on page 11, note the following:

- If your deployment includes different processing servers for production, staging, and UAT, you must install the License Manager in every one of those landscapes.
- You can choose **Complete** and install all Ivanti Service Manager features on all of your servers, but doing that takes up more disk space than necessary.

When installing components, note the following:

- To not install a component, click the down arrow next to the server icon next to the category name, highlight the component, right click, and select **This feature will not be available**.
- If your deployment includes DSM, you do not need to install the DSM Integration service because that component has been incorporated into Ivanti Service Manager since Release 2015.2.

7. Click **Next**. The system displays the **Ready to Install the Program** dialog box.
8. Click **Install**. The system begins installing Ivanti Service Manager and displays a status dialog box, showing the installation progress of each module over the next few minutes.
9. Click **OK** if the system displays a dialog box saying that reboot is required after installation.
10. If the system displays a dialog box saying that some of the files that need to be updated are currently in use, choose **Automatically close and attempt to restart applications** and click **OK**.

When the installation is completed, the system displays the System Configuration Wizard.

11. Go to "Configuring Ivanti Service Manager " on page 76 for instructions about using the System Configuration Wizard.

## Installing the Reporting Feature

- "About Installing the Reporting Feature" on the next page
- "Where to Install the Reporting Feature" on the next page
- "Installing the Reporting Feature" on the next page



## About Installing the Reporting Feature

Ivanti Service Manager deployments can have multiple reporting tenant instances. To use the reporting feature in a multi-tenant environment, we highly recommend that you install a separate Microsoft SSRS instance for the reporting feature only. For example, a deployment may have one reporting server for the production instance of the tenant and another reporting server for the staging and UAT instances of the tenant. See "Enterprise Production Deployment" on page 11.

## Where to Install the Reporting Feature

Where you install the reporting feature depends on which deployment you have chosen. See "Ivanti Service Manager Deployment Overview" on page 7.

- For the "Demonstration or Proof-of-Concept Deployment" on page 7, you install the reporting feature onto the Ivanti Service Manager database server, after you have installed Ivanti Service Manager.
- For the "Minimum Production Deployment " on page 9, you install the reporting feature on the Ivanti Service Manager database server.
- For the "Enterprise Production Deployment" on page 11, you can install the reporting feature on the Ivanti Service Manager database servers or on a dedicated reporting server. See "Reporting Services Deployment Options" on page 32.

## Installing the Reporting Feature

Before you begin, ensure that you have met all of the prerequisites for installing the Ivanti Service Manager reporting feature. See "Prerequisites for Installing the Ivanti Service Manager Reporting Feature" on page 49. In particular, be sure that Microsoft SSRS is installed and running. See "Checking if Microsoft SSRS is Installed" on page 49.

To install the reporting feature, do the following:

1. Access the installation folder on the Software product CD or zip file and run ReportingServices.exe. Right-click and select **Run as Administrator** to ensure proper installation.  
  
The installer checks for the prerequisite software components. If any of those components is not installed, the system prompts you to install them now.
2. Select **Install** at the prompt. Installation of the prerequisite software can take several minutes. If you are prompted to restart the system, click **Yes**. The system displays the **Welcome** dialog box. The installer checks for space and other requirements before displaying the **Next** button.
3. Click **Next**. The system displays the **License Agreement** dialog box.
4. Select **I accept the terms in the license agreement** and click **Next**. The system displays the **Destination Folder** dialog box.

5. Click **Next** to accept the default installation folder, or click **Change...** and select a different folder.
6. Click **Next**. The system displays the **Ready to Install the Program** dialog box.
7. Click **Install**. The system begins installing the Ivanti Service Manager reporting feature and displays a status dialog box showing the installation progress over the next few minutes.  
  
When the components are installed, the system automatically launches the System Configuration Wizard.
8. Go to "Configuring the Reporting Feature" on page 113 for instructions about using the System Configuration Wizard.

## Installing Discovery on a Dedicated Server

In small deployments, you install Discovery with the other Ivanti Service Manager components on the Ivanti Service Manager production servers. For an "Enterprise Production Deployment" on page 11, you can either install Discovery on the production servers or, to reduce the load on the production servers, you can configure a dedicated Discovery server. If you install Discovery on your production servers and then experience a significant load increase, we recommend configuring a dedicated Discovery server.

This topic describes how to install Discovery on a dedicated server.

1. Install Ivanti Service Manager on your production servers. See "Installing Ivanti Service Manager" on page 58.
2. On the server dedicated to Discovery, access the installation folder on the Software product CD or zip file and run IvantiServiceManager.exe. Right-click and select **Run as Administrator** to ensure proper installation.  
  
The installer checks for the prerequisite software components. If any of those components is not installed, the system prompts you to install them now.
3. Click **Install** at the prompt. Installation of the prerequisite software can take several minutes. If you are prompted to restart the system, click **Yes**. The system displays the **Welcome** dialog box. The installer checks for space and other requirements before displaying the **Next** button.
4. Click **Next**. The system displays the **License Agreement** dialog box.
5. Select **I accept the terms in the license agreement** and click **Next**. The system displays the **Destination Folder** dialog box.
6. Click **Next** to accept the default installation folder or click **Change...** and select a different folder. The system displays the **Setup Type** dialog box.
7. Select the following components for the **Custom Setup** dialog box. Under Discovery, choose:
  - Web Application Components
  - Discovery Web Server

8. Click **Next**. The system displays the **Ready to Install the Program** dialog box.
9. Click **Install**. The system begins installing Discovery and displays a status dialog box showing the installation progress of each component over the next few minutes.

When the components are installed, the system automatically displays the System Configuration Wizard.

10. Go to "Configuring the Discovery Application Server" on page 103 for instructions about using the System Configuration Wizard.

## Installing the Knowledge Uploader (Knowledge Import Tool)

- "About the Knowledge Uploader (Knowledge Import Tool)" below
- "Installing the Knowledge Uploader (Knowledge Import Tool)" below
- "Initially Configuring and Logging Into the NXT Knowledge Import Tool" on page 65
- "Using the NXT Knowledge Import Tool" on page 67
- "Initially Configuring and Logging Into the Knowledge Import Tool" on page 69
- "Using the Knowledge Import Tool" on page 70

### About the Knowledge Uploader (Knowledge Import Tool)

You can import knowledge articles from HEAT Classic, ITSM, or a local or networked file system into Ivanti Service Manager. Ivanti Service Manager currently has two knowledge import tools: the NXT Knowledge Server Tool (for NXT formats such as ITSM or HEAT Classic) and the Knowledge Server Tool (to use with file systems). These tools are collectively called the Knowledge Uploader and are also called the Knowledge Import Tool.

For information about using these tools after you have installed and configured them, see **Using the Knowledge Uploader** in the Ivanti Service Manager online help.

### Installing the Knowledge Uploader (Knowledge Import Tool)

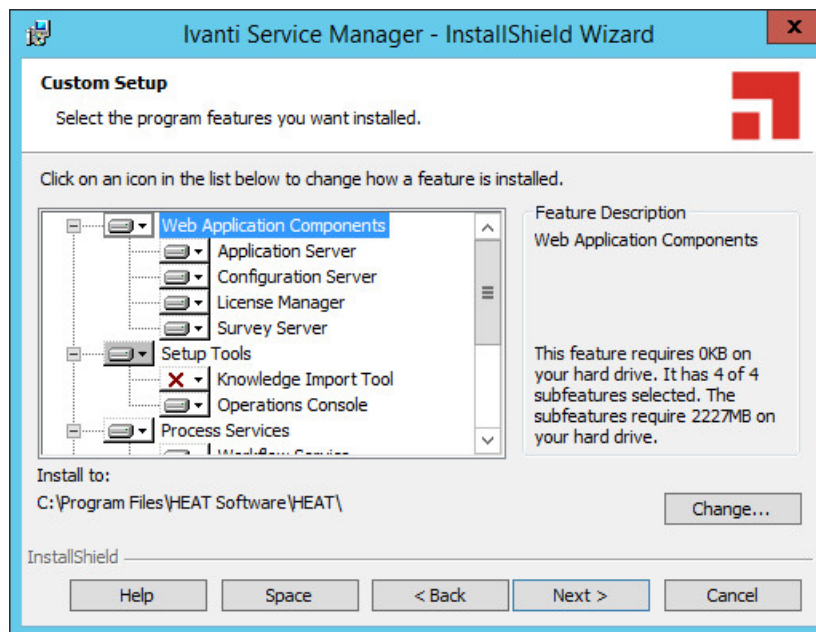
Most installations of Ivanti Service Manager automatically include the Knowledge Uploader (also called the Knowledge Import Tool).

The following procedure is necessary only if you did not install the Knowledge Uploader when you installed Ivanti Service Manager.

On the server or servers that you are going to use as the production environment, do the following:

1. Access the installation folder on the Software product CD or zip file and run IvantiServiceManager.exe. Right-click and select **Run as Administrator** to ensure proper installation.  
  
The installer checks for the prerequisite software components. If any of those components is not installed, the system prompts you to install them now.
2. Click **Install** at the prompt. Installation of the prerequisite software can take several minutes. If you are prompted to restart the system, click **Yes**. The system displays the **Welcome** dialog box. The installer checks for space and other requirements before displaying the **Next** button.
3. Click **Next**. The system displays the **License Agreement** dialog box.
4. Choose **I accept the terms in the license agreement** and click **Next**. The system displays the **Destination Folder** dialog box.
5. Click **Next** to accept the default installation folder or click **Change...** and select a different folder. The system displays the **Setup Type** dialog box.
6. Select **Custom** in the **Setup Type** dialog box and click the **Knowledge Import Tool** under Setup Tools. See "Custom Setup and the Knowledge Import Tool" below.

*Custom Setup and the Knowledge Import Tool*



7. Click **Next**. The system displays the **Ready to Install the Program** dialog box.
8. Click **Install**. The system begins installing Ivanti Service Manager and displays a status dialog box showing the installation progress of each component over the next few minutes.

When the installation is finished, the system displays the **InstallShield Wizard Completed** dialog box.

9. Click **Finish**. When the file installation is finished, the system displays the System Configuration Wizard.
10. Close the System Configuration Wizard, as there is no specific configuration for the Knowledge Uploader in the System Configuration Wizard.

The system now has two new applications on it. They are called Knowledge Import Tool and Knowledge Import Tool (NXT).

## Initially Configuring and Logging Into the NXT Knowledge Import Tool



There are two knowledge tools. This topic is about the NXT Knowledge Import Tool and NOT the Knowledge Import Tool.

After you have installed Ivanti Service Manager, including the Knowledge Uploader (also called the Knowledge Import Tool), do the following to initially configure and log into the NXT Knowledge Import Tool:

1. On the system where you installed Ivanti Service Manager, open the application called **Knowledge Import Tool NXT**. The system displays the **NXT Knowledge Server Configuration** dialog box. See "NXT Knowledge Server Configuration Dialog Box" below.

*NXT Knowledge Server Configuration Dialog Box*

2. Enter information into the fields.

| Parameter      | Description   |
|----------------|---|
| Server Version | The version of the NXT server that you are taking the knowledge articles from. To determine the server version, open the program and find the server information. |

| Parameter      | Description   |
|----------------|---|
|                | You can choose from any of the following:<br>Knowledge Service V5.0.4003.3<br>Knowledge Service Plus V9.6.1.13<br>Knowledge Service Plus V9.6.1.14                                      |
| Server Address | Enter the following:<br>The protocol type (uses TCP by default)<br>The server path of the NXT server that you are taking the knowledge articles from<br>The port (uses 2242 by default) |
| User Name      | The user name of a person who can access the NXT server that you are taking the knowledge articles from.  |
| Password       | The password associated with the user name.   |
| Save password  | Saves the password.   |

**i** To change these settings after the initial configuration, from the menu bar select **Configuration > Configure NXT server**.

3. Click **Continue**.
4. The system displays the **Login** dialog box. See "Knowledge Server Tool Login" below.

*Knowledge Server Tool Login*

5. Enter information into the fields.

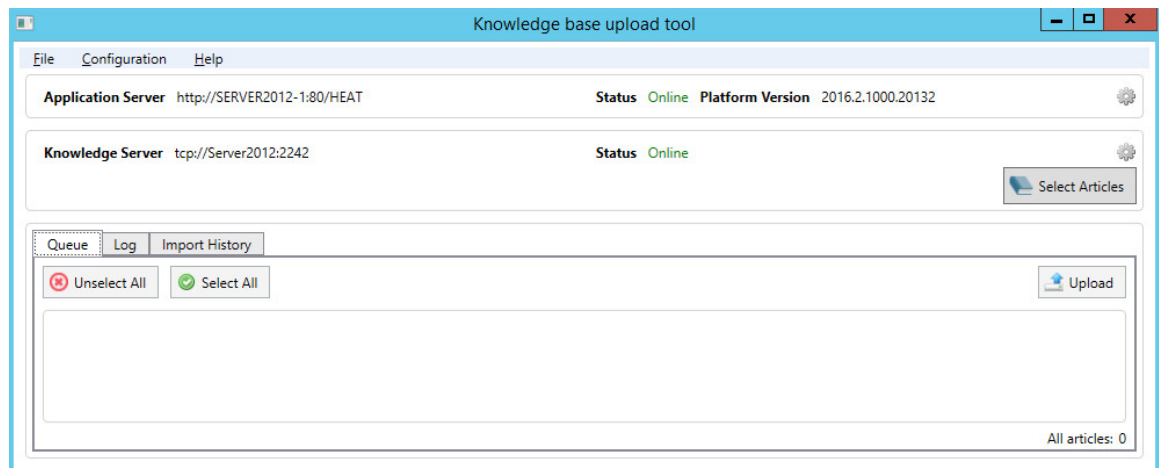
| Parameter | Description  |
|-----------|--|
| User Name | The user name of a person who can access Ivanti Service Manager. |

| Parameter     | Description   |
|---------------|---|
| Password      | The password associated with the user.  |
| Tenant        | The tenant to log into. You can select either ConfigDB to log into the configuration database or IvantiSM to log into Ivanti Service Manager. |
| Save password | Saves the password.   |

**i** To change these settings after the initial configuration, from the menu bar select **Configuration > Configure application server**.

- Click **Continue**. The system displays the **Select role** dialog box.
- Select the role to log in as and click **Continue**. The system displays the **Knowledge base upload tool** page.

*Knowledge Base Upload Tool*



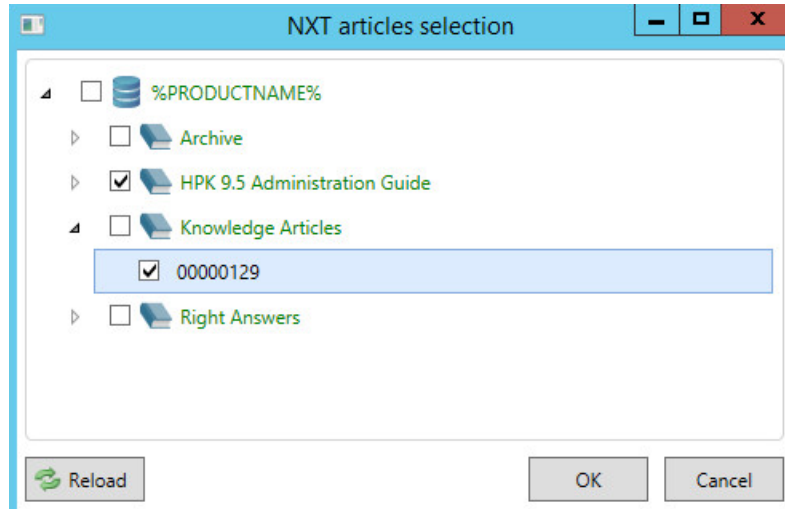
## Using the NXT Knowledge Import Tool

**i** There are two knowledge tools. This topic is about the NXT Knowledge Import Tool and NOT the Knowledge Import Tool.

Follow these steps to import knowledge into Ivanti Service Manager.

- Click **Select Articles** to select the knowledge articles to import. The system displays the **NXT articles selection** dialog box.
- Expand the list to see where knowledge articles are located, and then highlight one or more articles.

*Select the Knowledge Articles to Import*



3. Click **OK**. The system lists the selected articles on the bottom part of the page.
4. Select the articles to upload and click **Upload** to launch the **Article Creation** wizard and start the upload process.

The **Article Creation wizard** page contains two main areas: a **Selected Documents** area on the left containing the list of files to import, and a **Document Properties** area on the right that contains two tabs. One tab is called **Default Values** and the other is called **Selected Documents**.

5. To remove a document from the **Selected Documents** section, check it and click **Remove selected**. By default, the knowledge uploader imports all of the documents in the **Selected Documents**, even if you do not select them.
6. Optionally, use the **Document Properties** section to specify the properties that the knowledge uploader displays together with the files in Ivanti Service Manager. You can specify properties for all files (using the **Default values** tab) or for individual files (using the **Selected Document** tab after highlighting the file in the **Selected Documents** section).

You can specify these properties:

- **Article Type:** The article type. Select from Document, Error Message, Issue Resolution, Patch, Q&A, or Reference.
- **Article Status:** The status of the article. Select from Approved, Draft, Expired, Failed Review, Pending Review, Published, or Submitted.
- **Target collection:** The target. Select from Company Policy & Procedure, Customer Knowledge, Internal Knowledge, IT Knowledge, or Service Desk.
- **Category:** The category for this knowledge article.
- **Subject:** The subject of the article.
- **Resolution:** The resolution details if the knowledge article contains this information.



- **Description:** A description for the knowledge article.
7. Click **Import**. The system starts importing the selected knowledge articles.

If you select a file that has already been imported into the knowledge base, the system displays the **Collision warning** dialog box.
  8. Depending on what you want to do with the file that has already been imported, click one of the following:
    - **Apply for all:** Applies your choice to all previously imported files that are found during the import process.
    - **Update:** Overwrites the file that already exists in the Knowledge Base with the file that is being imported.
    - **Create New:** Does not overwrite the file being imported with the file that already exists in the Knowledge Base. After importing, there are two knowledge articles with the same name in the Knowledge Base.
    - **Cancel:** Cancels the import process.

The system displays a dialog box with the status of the import.
  9. Click **OK**.
  10. Optionally, do the following:
    - Review the import logs by clicking the **Log** tab. You can clear or save the log.
    - Review the import history by clicking the **Import History** tab. Click a number in the **Imported** column to display more information about an import session.

## Initially Configuring and Logging Into the Knowledge Import Tool

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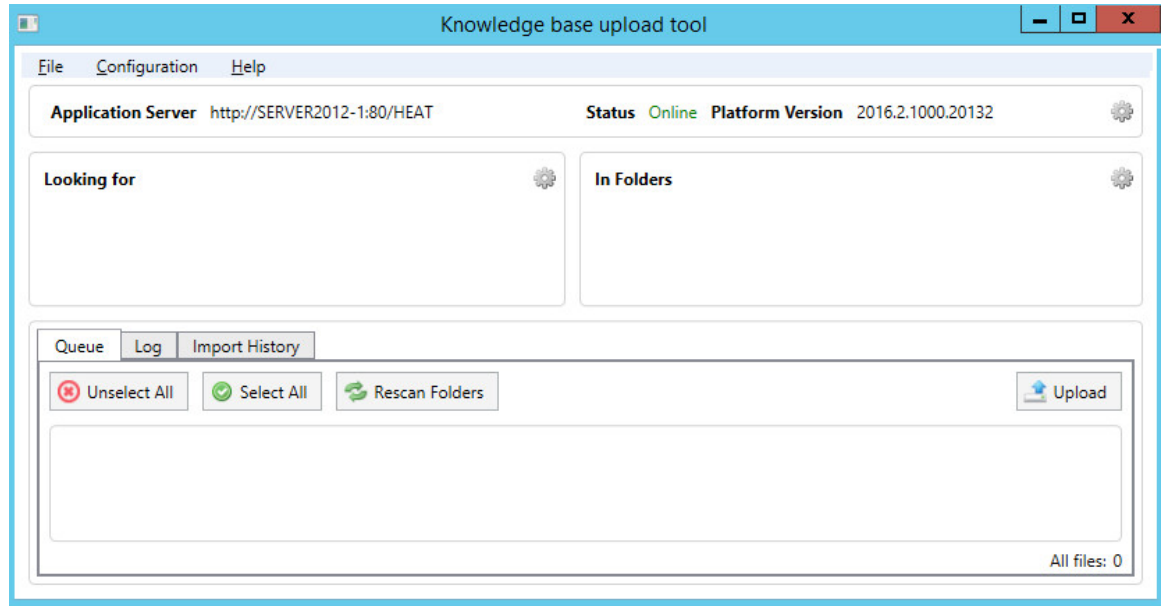
There are two knowledge tools. This topic is about the Knowledge Import Tool and NOT the NXT Knowledge Import Tool.

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After you have installed Ivanti Service Manager, including the Knowledge Uploader, do the following to initially configure and log into the Knowledge Import Tool:

1. On the system where you installed Ivanti Service Manager, open the application called **Knowledge Import Tool**. The system displays the **Select role** dialog box.
2. Select the role to log in as and click **Continue**. The system displays the **Knowledge base upload tool** page.

*Knowledge Base Upload Tool*





## Using the Knowledge Import Tool



There are two knowledge tools. This topic is about the Knowledge Import Tool and NOT the NXT Knowledge Import Tool.

Follow these steps to import knowledge into Ivanti Service Manager.

1. Specify the article file type to search for, by doing the following:
  - a. Click the **Settings** icon  in the **Looking for** section. The system displays the **File search filters** dialog box.
  - b. In the **Add New** drop-down list, select one or more file types:
    - **Microsoft office documents**: Files that have .doc, .docx, .xls, and .xlsx extensions.
    - **PDF files**: Files that have a .pdf extension.
    - **Images**: Files that have .bmp, .jpg, and .gif extensions.
  - c. Optionally, you can add more file types by clicking **Custom**. The system adds a line item to the filter list called Custom. Click the line item to open it for editing. You can change the filter name and specify one or more extensions. Click **OK**. The system adds the file types that you specified to the **Looking for** section.
2. Specify which local or network folders to search for knowledge articles and then perform the search:

- a. Click the **Settings** icon  in the **In Folders** section. The system displays the **Import folders** dialog box.
- b. Click **Add New**. The system displays the **Browse For Folder navigation** dialog box.
- c. Navigate to a folder and highlight it. (To optionally add a new subfolder to the folder, click **Make New Folder**.)
- d. Click **OK**. The system adds the folder to the list of folders to search. If you created a new folder, the system adds it to the file system as an empty folder.
- e. Optionally, check **Recursive** for a folder to specify that the system should search the subfolders within the folder.
- f. Optionally, check **Monitor for changes** to configure the knowledge uploader to monitor all of the folders on the list for changes to the file types that you specified in step 1b.
- g. Repeat steps b-f to continue to add folders to the list as necessary.
- h. Click **OK**.

The knowledge uploader performs the search and displays all of the files that meet the search criteria.

3. Select the files to upload:
  - a. If you think the contents of the scanned folders might have changed, click **Rescan Folders** to regenerate the file list.
  - b. In the file list, check the files to upload, or click **Select All** to upload all of the files.
  - c. Click **Upload** to launch the **Article Creation** wizard and start the upload process.

The **Article Creation wizard** page contains two main areas: a **Selected Documents** area on the left containing the list of files to import, and a **Document Properties** area on the right that contains two tabs. One tab is called **Default Values** and the other is called **Selected Documents**.

4. To remove a document from the **Selected Documents** section, check it and click **Remove selected**. By default, the knowledge uploader imports all of the documents in the **Selected Documents**, even if you do not select them.
5. Optionally, use the **Document Properties** section to specify the properties that the knowledge uploader displays together with the files in Ivanti Service Manager. You can specify properties for all files (using the **Default values** tab) or for individual files (using the **Selected Document** tab after highlighting the file in the **Selected Documents** section).

You can specify these properties:

- **Article Type:** The article type. Select from Document, Error Message, Issue Resolution, Patch, Q&A, or Reference.
  - **Article Status:** The status of the article. Select from Approved, Draft, Expired, Failed Review, Pending Review, Published, or Submitted.
  - **Target collection:** The target. Select from Company Policy & Procedure, Customer Knowledge, Internal Knowledge, IT Knowledge, or Service Desk.
  - **Category:** The category for this knowledge article.
  - **Use file name as Subject:** Check to use the article file name to fill in the **Subject** field.
  - **Subject:** Only use this field if you did not check **Use file name as Subject**. Enter a subject for the article.
  - **Resolution:** Enter the resolution if the knowledge article contains one.
  - **Description:** Enter a description for the knowledge article.
6. Click **Import**. The import process begins.
- If you select a file that has already been imported into the knowledge base, the system displays the **Collision warning** dialog box.
7. Depending on what you want to do with the file that has already been imported, click one of the following:
- **Apply for all:** Applies your choice to all previously imported files that are found during the import process.
  - **Update:** Overwrites the file that already exists in the knowledge base with the file that is being imported.
  - **Create New:** Does not overwrite the file being imported with the file that already exists in the knowledge base. After importing, there are two knowledge articles with the same name in the knowledge base.
  - **Cancel:** Cancels the import process.

The system displays an Import dialog box with the status of the import.

8. Click **OK**.
9. Optionally, do the following:
- Review the import logs by clicking the **Log** tab. You can clear or save the log.
  - Review the import history by clicking the **Import History** tab. Click a number in the **Imported** column to display more information about an import session.

# Initially Configuring the System

As part of the Ivanti Service Manager installation, you must configure the system using the System Configuration Wizard. The wizard walks you through the first-time set up and configuration.

The tabs that you see in the wizard depend on which components that you installed. You may see all of the tabs or you may just see a subset of them.

See the following sections:

- "Using the System Configuration Wizard" below
- "Configuring Ivanti Service Manager " on page 76
- "Configuring the Reporting Feature" on page 113
- "Configuring Discovery" on page 121
- "Configuring the Deployment on the Ivanti Service Manager Operations Console" on page 124
- "Optional SSL Configuration" on page 129
- "Optional LDAP Configuration" on page 139
- "About Configuring with ADFS" on page 139
- "About Configuring Throttling Settings" on page 139

## Using the System Configuration Wizard

The System Configuration Wizard provides an interface in which you can perform various configuration tasks for the initial setup of Ivanti Service Manager.

- "Starting the System Configuration Wizard Manually" below
- "Navigating the System Configuration Wizard" below
- "Actions to Perform in Each Page" on the next page

## Starting the System Configuration Wizard Manually

The System Configuration Wizard starts automatically after you finish installing Ivanti Service Manager.

You can also start the System Configuration Wizard manually after your system is configured. See "Changing Feature Settings by Running the System Configuration Wizard" on page 145.

## Navigating the System Configuration Wizard

The System Configuration Wizard contains the areas shown in "System Configuration Wizard Areas" on the next page.

## System Configuration Wizard Areas

- In the configuration step area, the page that you are currently working on is highlighted in yellow.
- After you complete a page and click **Next**, the system places a green check mark next to the completed page name to show that it has been completed.



The configuration step area is not a navigation pane. You cannot go to a page by clicking it in the configuration step area. Instead, click the **Next** and **Previous** buttons to move through the pages sequentially.

- The page display area shows the wizard page itself, including the fields and controls that you set the various parameters.

## Actions to Perform in Each Page

The System Configuration Wizard page numbers can change depending on the features you choose to install.

Unless otherwise noted, the settings that you specify in each wizard page are stored in the Configuration Database.

**Configuration Application** page:

- Specify the name of the configuration database and the authentication method that is used by all supported web applications when connecting to the configuration database.
- Create or recreate the configuration database.
- If you use Windows Integrated Security for the configuration database, specify the Windows domain credentials for the service account.

See "Configuring the Configuration Database" on page 77.

**Service Manager Application** page:

- Specify the name and authentication method for the server where the Ivanti Service Manager application database resides.
- Load the demo database on a server other than the server where the Ivanti Service Manager application database resides. This option allows you to review the demo database while the Ivanti Service Manager application database continues to run in its current configuration.
- Specify the application name, attachment location, client authorization key, and the type of name to use when accessing the application.

See "Configuring the Ivanti Service Manager Application" on page 83.

**Application Server Settings** page:

- Specify the location of the configuration server and the host name.
- Specify if you will use this server for surveys or the reporting feature.
- If you use Windows Integrated Security for the Ivanti Service Manager application server, specify the Windows domain credentials for the service account.

See "Configuring the Application Server Settings" on page 90.

**Other Feature Settings** page:

- Specify the log file and temporary file locations on the configuration server.
- Specify different server hosts and whether to use SSL for the Ivanti Service Manager application server.
- Specify the inbound web server information.

See "Configuring Other Feature Settings" on page 94.

**Metrics Server** page:

- Specify the locations for the log file and the Ivanti Service Manager configuration server.

- Map applications to the metrics server.  
See "Configuring the Metrics Server" on page 98.

**Microsoft SSRS Configuration** page:

- Appears when you install the reporting feature.
- Specify information about the Microsoft SQL Server database for the reporting feature.  
See "Configuring the Reporting Feature" on page 113.

**Reporting Service Configuration** page:

- Appears when you install the reporting feature.
- Specify information about the Ivanti Service Manager report database for the reporting feature.  
See "Configuring the Reporting Feature" on page 113.

**Discovery Application Server** page:

- Specify information about the configuration of the Discovery application server.  
See "Configuring the Discovery Application Server" on page 103.

**Discovery Web Server** page:

- Specify information about the configuration of the Discovery web server.
- Upgrade the configuration database and the Ivanti Service Manager application database.  
See "Configuring the Discovery Web Server" on page 109.

**Upgrade System** page:

- Appears when you upgrade to a newer release of Ivanti Service Manager.
- Upgrade the configuration database and the Ivanti Service Manager application database.  
See "Upgrading Ivanti Service Manager from an Earlier Release" on page 147.

## Configuring Ivanti Service Manager

The following sections contain step-by-step instructions for the procedures that you can perform through the System Configuration Wizard.

- "About Entering Server Location Names in the System Configuration Wizard" on the next page
- "Configuring the Configuration Database" on the next page
- "Configuring the Ivanti Service Manager Application" on page 83
- "Configuring the Application Server Settings" on page 90



- "Configuring Other Feature Settings" on page 94
- "Configuring the Metrics Server" on page 98
- "Configuring the Discovery Application Server" on page 103
- "Configuring the Discovery Web Server" on page 109
- "Finishing the System Configuration" on page 112
- "Installing the Demo Data Package" on page 112

## About Entering Server Location Names in the System Configuration Wizard

For all of the fields in the System Configuration Wizard that ask for a server location, unless noted otherwise, you can enter one of three things:

- An IP address
- A machine name
- A fully-qualified domain name

We recommend that you use the same naming format in all server location fields, if possible.

If you are using SSL, you must enter a fully-qualified domain name.

If you have a load-balanced system, we recommend using a fully-qualified domain name.

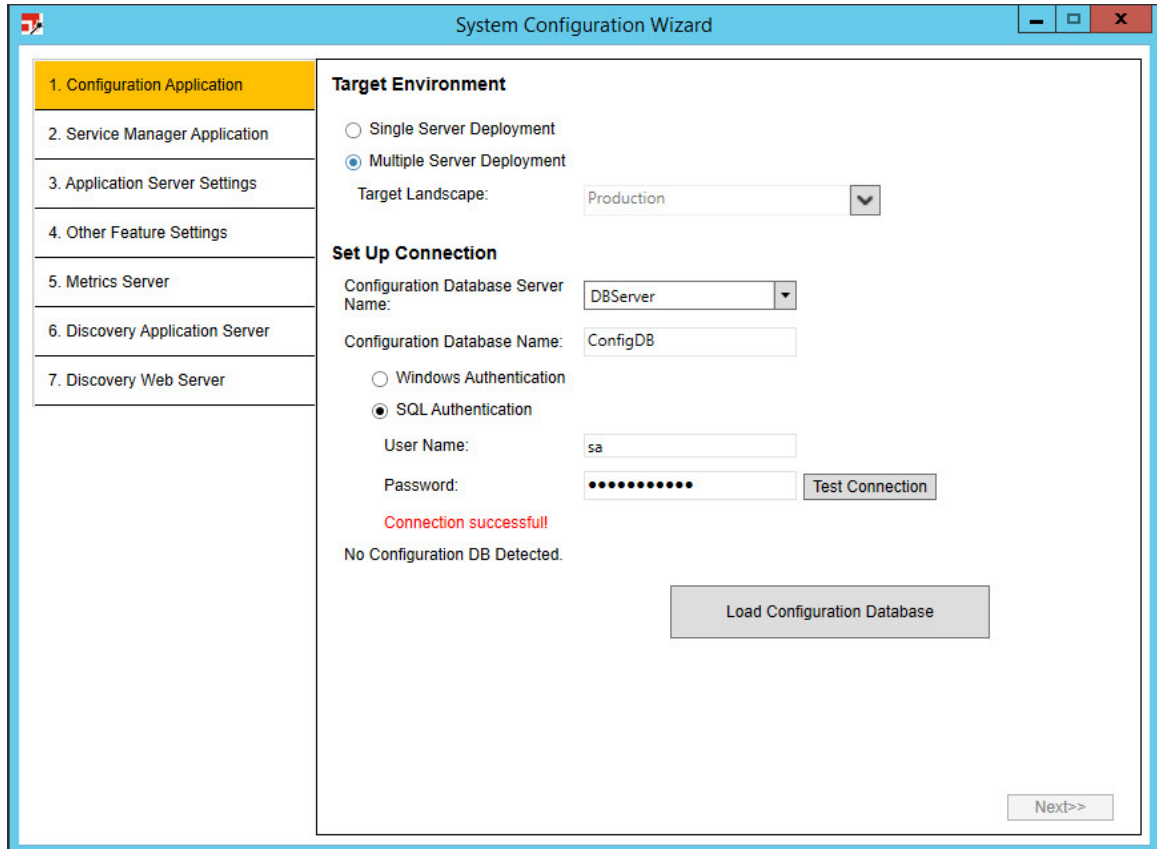
## Configuring the Configuration Database

After you have installed Ivanti Service Manager, the System Configuration Wizard starts automatically and displays the **Configuration Application** page.

On this page, you will do the following:

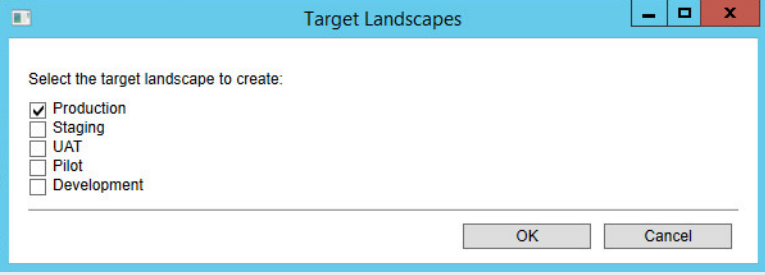
- Specify the name of the configuration database and the authentication method that is used by all supported web applications when connecting to the configuration database.
- Create or recreate the configuration database.
- If you use Windows Integrated Security for the configuration database, specify the Windows domain credentials for the service account.

*Configuration Application Page*



1. Enter values into the fields:

| Parameter          | Description   |
|--------------------|---|
| Target Environment |   |
| Deployment         | <p>Choose one of the following:</p> <p><b>Single Server Deployment:</b> If you are setting up the "Minimum Production Deployment " on page 9.</p> <p><b>Multiple Server Deployment:</b> If you are setting up the "Enterprise Production Deployment" on page 11.</p>  |
| Target Landscape   | <p>(Only if you selected <b>Multiple Server Deployment</b>) Click the down arrow. The system displays the <b>Target Landscapes</b> dialog box.</p> <p>On the first server that you configure, check <b>Production</b> and click <b>OK</b>.</p> <p>On subsequent servers, check any combination of landscapes other than production and enter values in the subsequent fields. See below.</p> <p><i>Target Landscapes Dialog Box</i></p> |

| Parameter                       | Description  |
|---------------------------------|--|
|                                 |    |
| Production Configuration Server | <p>(Only if you selected <b>Multiple Server Deployment</b> and selected anything other than <b>Production</b> in the <b>Target Landscape</b> field)</p> <p>The host or domain name of the configuration server for the production instance. Do not enter the information for any other instance; you must enter the information for the production instance.</p> |
| Port                            | <p>(Only if you selected <b>Multiple Server Deployment</b> and selected anything other than <b>Production</b> in the <b>Target Landscape</b> field)</p> <p>The port number of the production server. The default is 80, or 443 if you check <b>Use SSL</b>.</p>  |
| Use SSL                         | <p>(Only if you selected <b>Multiple Server Deployment</b> and selected anything other than <b>Production</b> in the <b>Target Landscape</b> field)</p> <p>Check to enable SSL encryption to the server.</p>   |

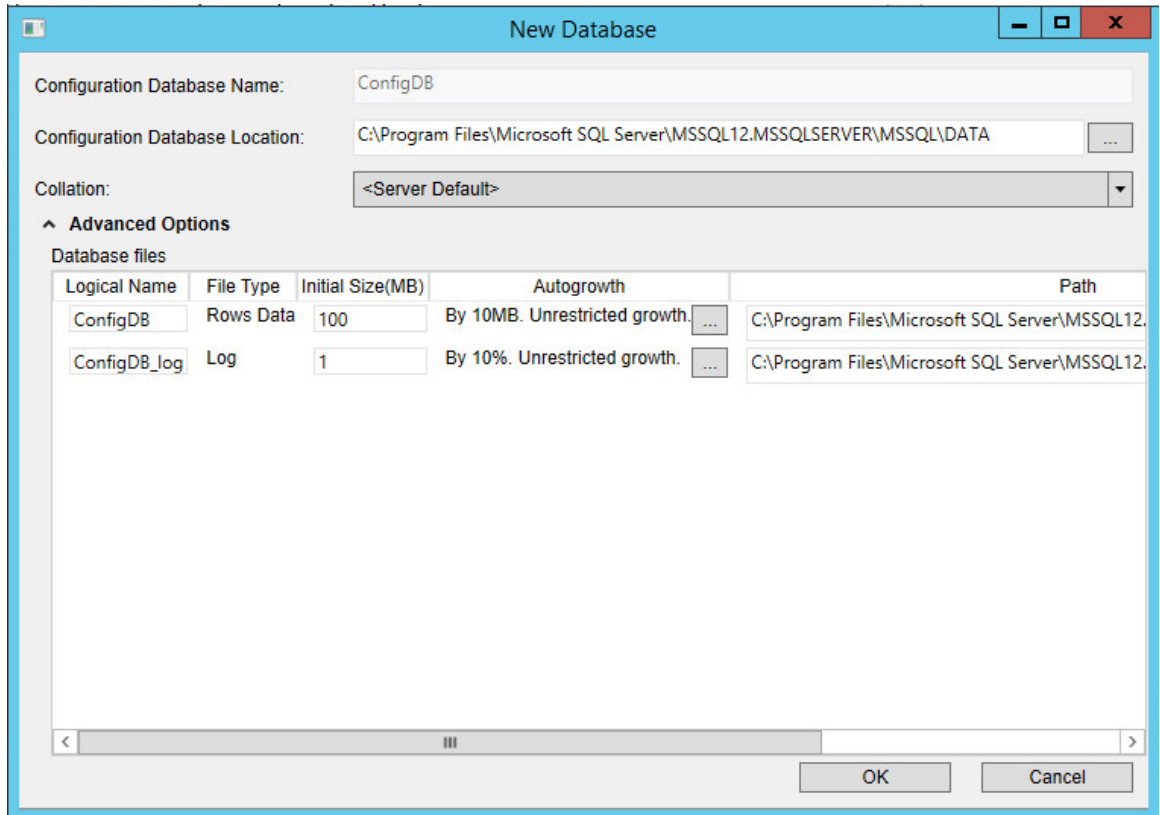
2. Click **OK** to close the **Target Landscapes** dialog box.
3. Enter values into the fields:

| Parameter                          | Description   |
|------------------------------------|---|
| Configuration Database Server Name | <p>The server where the configuration database is located.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Accept the default value.</li> <li>Enter the name of the server of the configuration database.</li> <li>Browse for a server name by clicking the down arrow and selecting <b>&lt;Browse for more...&gt;</b>. The system displays any Microsoft SQL Server instances in your network. Choose a server and click <b>OK</b>.</li> </ul> <p><b>NOTE:</b> Do not choose <b>localhost</b> unless you are setting up a "Demonstration or Proof-of-Concept Deployment" on page 7.</p> |
| Configuration Database Name        | <p>The name of the configuration database. The default name is ConfigDB and you cannot change the name.</p>   |
| Authentication Method              | <p>Select one of the following:</p>   |

| Parameter | Description  |
|-----------|--|
|           | <p><b>Windows Authentication:</b> Uses Microsoft Windows authentication. If you select this option, the system displays the current login account.</p> <p><b>SQL Authentication:</b> Uses Microsoft SQL authentication. If you select this option, enter the user name and password below.</p>   |
| User Name | <p>(Only if you selected <b>SQL Authentication</b>) The user name associated with the Microsoft SQL authentication.</p> <p><b>NOTE:</b> If your deployment store FILESTREAM attachments, specify a configuration database user account that has a db_owner role on Microsoft SQL Server. See "Task 2: Setting up Ivanti Service Manager" on page 48.</p> |
| Password  | <p>(Only if you selected <b>SQL Authentication</b>) The password associated with the user name for the Microsoft SQL authentication.</p>   |

- Click **Test Connection** to test the connection to the configuration database server. The system displays *Connection successful!* if the connection is good. You must have a working connection to create a database. You cannot continue with the configuration if this connection does not work.
- Depending if there is already a configuration database, click **Load Configuration Database** or **Re-Create & Load Configuration DB**. If the configuration database already exists, the system asks if you want to recreate the database. Click **Yes**. The system displays the **New Database** dialog box.

*New Database Dialog Box*



6. Enter values into the fields:

| Parameter                       | Description  |
|---------------------------------|--|
| Configuration Database Name     | The name of the configuration database. The default name is ConfigDB and cannot be changed.  |
| Configuration Database Location | The location for the configuration database.<br><br><b>NOTE:</b> If you have customized the existing configuration database, specify a different location; otherwise, the system overwrites your customization when you load the recreated database. |
| Collation                       | The set of rules that describe how to compare and sort strings, such as the order in which letters are sorted and whether case matters.  |
| Advanced Options                |  |
| Logical Name                    | The logical name of the configuration database. This name is stored as a file name, and is a separate entity from the read-only database name that is displayed in Microsoft SQL Server Management Studio.   |
| File Type                       | The file type, either database records or database logs. These values are read-only.   |

| Parameter         | Description   |
|-------------------|---|
| Initial Size (MB) | The initial file size, in MB, when creating the configuration database.   |
| Autogrowth        | Specifies how the database will expand when it reaches its maximum file size. We recommend having at least 1 GB or 10% to start with. Click ... to update the values. |
| Path              | The location of the file. Click ... to update the location.   |
| File Name         | The name of the file.   |

7. Click **OK**. The system creates the configuration database and installs it on the configuration database server that you specified. Several progress dialog boxes appear as various Microsoft SQL scripts execute to create and load the configuration database. After the system loads the configuration database, the **Configuration Application** page displays *Configuration database loaded*.
8. Click **Next**. The system refreshes the **Configuration Application** page. (If you end up on the next page of the System Configuration Wizard, click **Previous** to return to the **Configuration Application** page.)
9. Enter values into the fields:

| Parameter                            | Description  |
|--------------------------------------|--|
| Configuration Server Domain Name     | The fully-qualified domain name of the configuration server in this format: config.servername.com.   |
| License Server                       | The name of the license server. We recommend using a fully-qualified domain name.  |
| Port                                 | The port number of the license server. The default is 80, or 443 if you check <b>Use SSL</b> .   |
| Use SSL                              | Check if the license server uses SSL.  |
| IvantiSM License File-Production     | <p>The name of the license file for the Ivanti Service Manager production instance. Click <b>Browse...</b>, navigate to the license file, and click <b>Open</b>. License files have a .lic suffix.</p> <p><b>NOTE:</b> The system displays either one or both of the license fields, depending on your landscape environment. At this point, you only need to enter one license, which allows the License Manager to start and run Ivanti Service Manager. You can import additional licenses, if needed, at a later time from within the License Manager. See "Using the License Manager" on page 154.</p>      |
| IvantiSM License File-Non-Production | <p>The name of the license file for the Ivanti Service Manager non- production instance. Click <b>Browse...</b>, navigate to the license file, and click <b>Open</b>. License files have a .lic suffix.</p> <p><b>NOTE:</b> The system displays either one or both of the license fields, depending on your landscape environment. At this point, you only need to enter one license, which allows the License Manager to start and run Ivanti Service Manager. You can import additional licenses, if needed, at a later time from within the License Manager. See "Using the License Manager" on page 154.</p> |

10. Create the administrator account for the configuration database. You only need to create this account once. If you return to this page in the System Configuration Wizard later, these fields are not displayed.

Enter values into the fields:

| Parameter        | Description  |
|------------------|--|
| Login ID         | The system automatically displays the login ID of HSWAdmin. You cannot change this.  |
| Password         | The password associated with the administrator.<br><br>Record this password for future reference. If you lose the password, you must recreate and load the configuration database. |
| Confirm Password | Re-enter the password associated with the administrator.   |
| First Name       | The first name of the administrator.   |
| Last Name        | The last name of the administrator.  |
| Email Address    | The email address of the administrator.  |

11. Do one of the following:

- If you chose **Single Server Deployment**, click **Next**. The system displays the **Ivanti Service Manager Application** page.
- If you chose **Multiple Server Deployment**, repeat all of the steps in this procedure to create a configuration database for each of your tenants. Then click **Next**. The system displays the **Ivanti Service Manager Application** page.

## Configuring the Ivanti Service Manager Application

On this page you will do the following:

- Specify the name and authentication method for the server where the application database resides.
- Load the demo database on a server other than the server where the application database resides. This option allows you to review the demo database while the application database continues to run in its current configuration.
- Specify the application name, attachment location, client authorization key, and the type of name to use when accessing the application.

The first time that you see this page, there is no application database, as shown in "Service Manager Application Page: No Database" below.

*Service Manager Application Page: No Database*

1. Enter values into the fields:

| Parameter                   | Description   |
|-----------------------------|---|
| Application Database Server | <p>The server where the application database is located. Usually this is the same server where the configuration database is located (specified earlier on the <b>Configuration Application</b> page).</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Accept the default value.</li> <li>Enter the name of the server of the application database.</li> <li>Browse for a server name by clicking the down arrow and selecting <b>&lt;Browse for more...&gt;</b>. The system displays any Microsoft SQL Server instances in your network. Choose a server and click <b>OK</b>.</li> </ul> <p><b>NOTE:</b> Do not choose <b>localhost</b> unless you are setting up a "Demonstration or Proof-of-Concept Deployment" on page 7.</p> |
| Application Database Name   | <p>The name of the application database. The default name is IvantiSM. The name that you specify here is used when the application database is created, and later, recreated.</p>   |



| Parameter             | Description  |
|-----------------------|--|
| Authentication Method | <p>Select one of the following:</p> <p><b>Windows Authentication:</b> Uses Microsoft Windows authentication.</p> <p><b>SQL Authentication:</b> Uses Microsoft SQL authentication. If you select this option, enter the user name and password below.</p> <p>See "Configuring the Reporting Feature" on page 113 for information on the appropriate database authentication type.</p> |
| User Name             | (Only if you selected <b>SQL Authentication</b> ) Enter the user name associated with the Microsoft SQL authentication.  |
| Password              | (Only if you selected <b>SQL Authentication</b> ) Enter the password associated with the user name for the Microsoft SQL authentication.   |

2. Click **Test Connection** to test the connection to the application database server. The system displays *Connection successful!* if the connection is good. You must have a working connection to create a database. You cannot continue with the configuration if this connection does not work.
3. Depending if there is already an application database, click **Load Application Database** or **Re-Create & Load Application DB**. If the application database already exists, the system asks if you want to recreate the database. Click **Yes**. The system displays the **New Database** dialog box.

*New Database Dialog Box*

The screenshot shows the 'New Database' dialog box with the following configuration:

- Application Database Name: IvantiSM
- Application Database Location: C:\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\DATA
- Collation: <Server Default>
- Advanced Options:
 

| Logical Name | File Type | Initial Size (MB) | Autogrowth                     | Path  |
|--------------|-----------|-------------------|--------------------------------|---|
| IvantiSM     | Rows Data | 2000              | By 200MB. Unrestricted growth. | C:\Program Files\Microsoft SQL Server\MSSQL12 |
| IvantiSM_log | Log       | 1                 | By 10%. Unrestricted growth.   | C:\Program Files\Microsoft SQL Server\MSSQL12 |

4. Enter values into the fields:

| Parameter                     | Description  |
|-------------------------------|--|
| Application Database Name     | The name of the application database. The default name is IvantiSM and cannot be changed.  |
| Application Database Location | The location for the application database.<br><br><b>NOTE:</b> If you have customized the existing application database, specify a different location; otherwise, the system overwrites your customization when you load the recreated database. |
| Collation                     | The set of rules that describe how to compare and sort strings, such as the order in which letters are sorted and whether case matters.  |
| Advanced Options              |  |
| Logical Name                  | The logical name of the application database. This name is stored as a file name, and is a separate entity from the read-only database name that is displayed in Microsoft SQL Server Management Studio.   |
| File Type                     | The file type, either database records or database logs. These values are read-only.   |
| Initial Size                  | The initial file size, in MB, when creating the application database.  |

| Parameter  | Description   |
|------------|---|
| (MB)       |   |
| Autogrowth | Specifies how the database will expand when it reaches its maximum file size. We recommend having at least 1 GB or 10% to start with. Click ... to update the values. |
| Path       | The location of the file. Click ... to update the location.   |
| File Name  | The name of the file.   |

- Click **OK**.

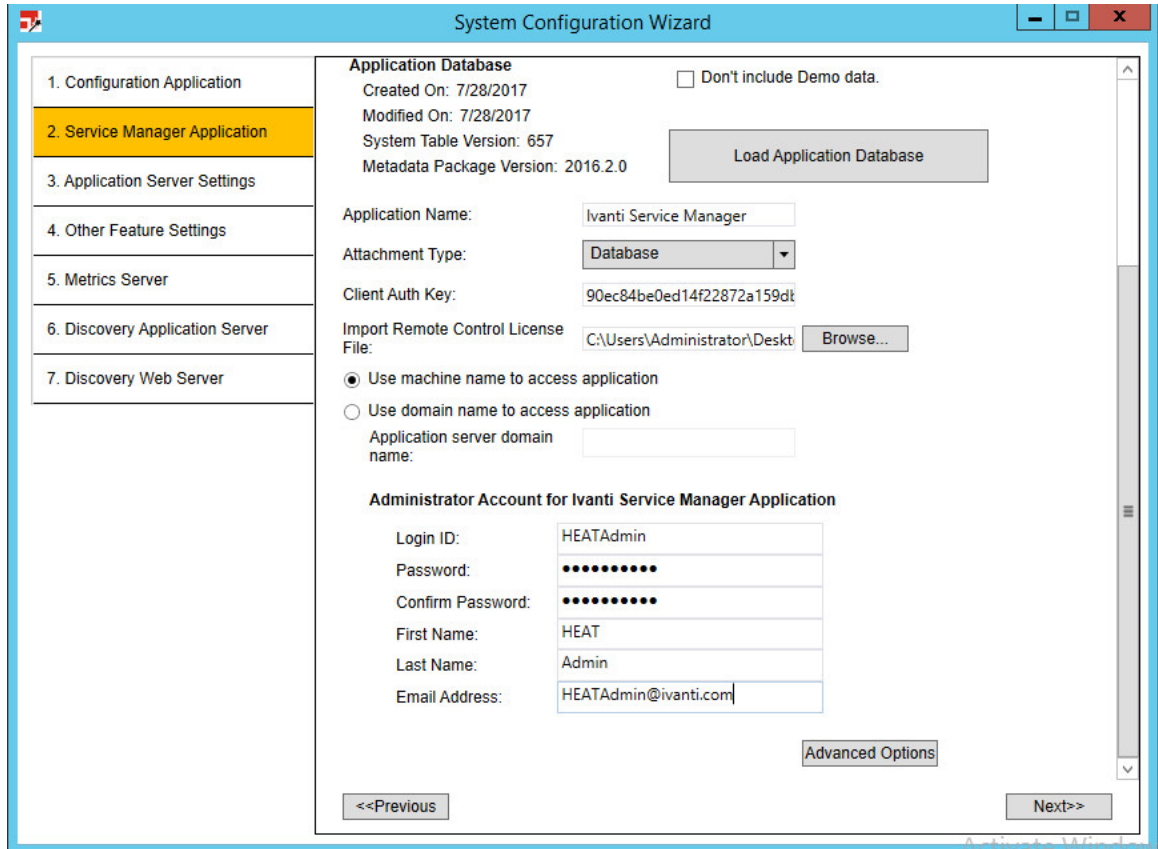
The system creates the application database and installs it on the application database server that you specified. The system displays several progress dialog boxes as the system executes various Microsoft SQL scripts that create and load the application database. After the system loads the application database, the system displays *Application Database loaded*.

- (Optional) Click **Advanced Options** to open the **Landscape Advanced Options** dialog box. See the "Adding a Landscape" topic in the *Operations Console User Guide for Ivanti Service Manager* for more information about these patterns.

*Landscape Advanced Options Dialog Box*

- Click **Next**. The system refreshes the **Application** page. See "Application Page: Newly Created Database" below. (If you end up on the next page of the System Configuration Wizard, click **Previous** to return to the **Application** page.)

*Application Page: Newly Created Database*



- Ivanti Service Manager comes with optional transaction data that you can use to test and view the analytic metrics, financial, ITFM, and other features.

To include demo data, ensure that **Don't include Demo data** is unchecked. You must install the demo data manually after the System Configuration Wizard finishes. See "Installing the Demo Data Package" on page 112.

- Enter values into the fields:

| Parameter        | Description   |
|------------------|---|
| Application Name | The name of the application.  |
| Attachment Type  | The location of the folder on the application database server where any Ivanti Service Manager attachments reside.<br><br>Select one of the following:<br>Database<br>FILESTREAM<br>File System |

| Parameter                          | Description  |
|------------------------------------|--|
| Client Auth Key                    | The authentication key that is used when the web services API accesses Ivanti Service Manager.   |
| Import Remote Control License File | (Optional) If you are going to use the remote control feature, you must have a remote control license.<br>Contact Ivanti Software to get the license. See "How to Contact Us" on page 6.<br>To import the remote control license file, click <b>Browse...</b> next to the <b>Import Remote Control License File</b> field.<br>Browse to the location of the license file and click <b>OK</b> to select it.   |
| To access the application          | Select whether to use the application database server machine name or the fully-qualified domain name for access to the application database server:<br><b>Use machine name to access Ivanti application:</b> When other Ivanti Service Manager components log into the application server, they use the machine name of the server. For example, they use <b>SERVER-01</b> . If you choose this option, the system detects the current machine name and uses it automatically; you do not need to specify the machine name.<br><b>Use domain name to access Ivanti application:</b> When other Ivanti Service Manager components log into the application server, they use the fully-qualified domain name of the server. For example, they use <b>SERVER-01.company.com</b> . If you plan on using SSL for connecting to the application server (configured later on the <b>Other Feature Settings</b> page), you must enter a fully-qualified domain name here, either for an individual machine or for a load-balanced instance. |
| Application server domain name     | (Only if you selected <b>Use domain name to access Ivanti application</b> ) The domain name of the application server.   |

- Click **Next** to refresh the **Application** page. (If you end up on the next page of the System Configuration Wizard, click **Previous** to return to the **Application** page.)
- Create the administrator account for the application database. This login ID and password allows you to access the Ivanti Service Manager Service Desk Console and Configuration Console. See "Logging into Ivanti Service Manager" on page 142. You only need to create this account once. If you return to this page in the System Configuration Wizard later, these fields are not displayed.

Enter values into the fields:

| Parameter | Description  |
|-----------|--|
| Login ID  | The system automatically displays the login ID of IvantiAdmin. You cannot change this.   |
| Password  | The password associated with the administrator.<br><br>Record this password for future reference. If you lose the password, you must recreate and load the application database. |

| Parameter        | Description  |
|------------------|--|
| Confirm Password | Re-enter the password associated with the administrator. |
| First Name       | The first name of the administrator.                     |
| Last Name        | The last name of the administrator.                      |
| Email Address    | The email address of the administrator.                  |

12. If you chose **Multiple Server Deployment** on the **Configuration Application** page, your system has multiple tenants. Each tenant must have an administrator account, so that the administrator can access the Ivanti Service Manager Service Desk Console and Configuration Console.

To create a new administrator account for another tenant instance, do the following:

- a. In the **Application Database Name** field at the top of this page, enter the next tenant to get an account.

For example, if you named your production tenant IvantiSM, your staging tenant IvantiSM-STG, and your UAT tenant IvantiSM-UAT, then the first time that you are on this page, enter **IvantiSM** in the **Application Database Name** field. The second time that you are on this page, enter **IvantiSM-STG** in the **Application Database Name** field. The third time that you are on this page, enter **IvantiSM-UAT** in the **Application Database Name** field.

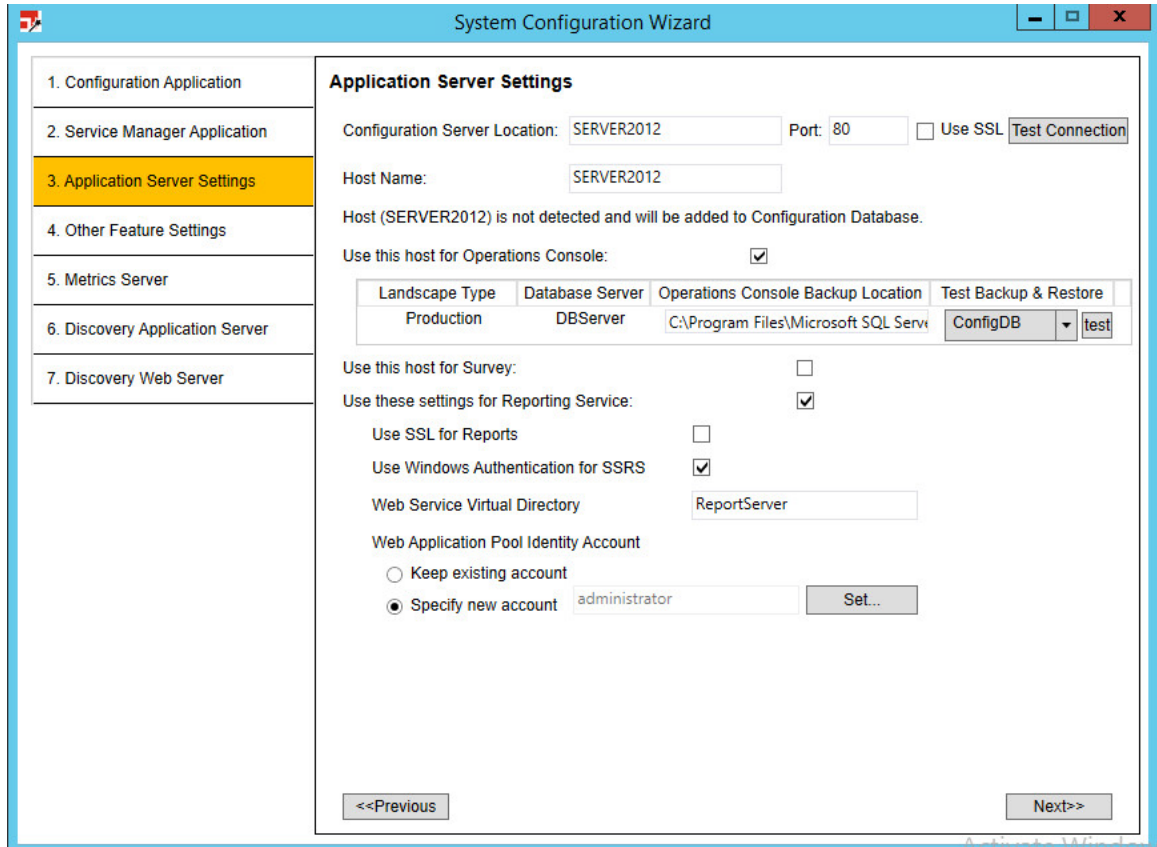
- b. Create the administrator account for the application database for the tenant. See step 11 above.
  - c. Click **Next**. The system displays the **Application Server Settings** page.
  - d. Click **Previous** to return to the **Ivanti Service Manager Application** page.
  - e. Repeat steps a. through d. for the next tenant.
13. After all of your tenants have an administrator account, click **Next** to advance to the **Application Server Settings** page.

## Configuring the Application Server Settings

You set connections to other databases in Ivanti Service Manager (ISM) on the **Application Server Settings** page. You will do the following:

- Specify the location of the configuration server and the host name.
- Specify if you will use this server for surveys or the reporting feature.
- If you use Windows Integrated Security for the Application Server, specify the Windows domain credentials for the service account.

*Application Server Settings Page*



1. Enter values into the fields:

| Parameter                     | Description   |
|-------------------------------|---|
| Configuration Server Location | The host name or domain name of the configuration server. The default value is the name of the server that you are logged into now.<br><br>If the host that you are logged into now is <i>not</i> the configuration server, enter the machine name or fully-qualified domain name of your Configuration Server.<br><br>If you check <b>Use SSL</b> below, you must enter the fully-qualified domain name of the configuration server. |
| Port                          | The port number of the configuration server. The default is 80, or 443 if you check <b>Use SSL</b> .  |
| Use SSL                       | Check to use SSL for connections to the configuration server.<br><br><b>NOTE:</b> We do not recommend enabling SSL on the configuration server until you have fully tested Ivanti Service Manager to ensure that it works with SSL. For information on configuring Ivanti Service Manager with SSL, see "Optional SSL Configuration" on page 129.   |

2. Click **Test Connection** to test the connection to the configuration server. The system displays a success or failure message. Click **OK** to close the message.
3. Enter values in the fields:

| Parameter                                   | Description  |
|---|--|
| Host Name                                   | <p>The location of the system that hosts the Application Server. The default value is the server that you are logged into now.</p> <p>Do one of the following:</p> <p>If you are installing all Ivanti Service Manager components on the same host, accept the default value.</p> <p>If you enter a different location, it must be a machine name. Do <i>not</i> enter a fully-qualified domain name.</p>        |
| Use this host for Ivanti Operations Console | <p>Uses this server for the Ivanti Service Manager Operations Console.</p> <p><b>NOTE:</b> If you have an "Enterprise Production Deployment" on page 11, we recommend that you only install and use the Ivanti Service Manager Operations Console on the staging (STG) instance of the tenant.</p>   |
| Landscape Type                              | (Only if you checked <b>Use this host for Ivanti Operations Console</b> ) Displays the landscape type and cannot be changed.   |
| Database Server                             | (Only if you checked <b>Use this host for Ivanti Operations Console</b> ) Displays the database server and cannot be changed.  |
| Operations Console Backup Location          | <p>(Only if you checked <b>Use this host for Ivanti Operations Console</b>) The backup location for the Ivanti Service Manager Operations Console. The backup location can either be on a database server or on a network folder.</p> <p>Do one of the following:</p> <p>Accept the default location.</p> <p>Enter a new location.</p> <p>Click <b>Browse...</b> and navigate to a new location.</p>             |
| Test Backup & Restore                       | <p>(Only if you checked <b>Use this host for Ivanti Operations Console</b>) The database to test to ensure you can back up and restore it. Select one from the drop-down list. We recommend that you select the configuration database since it is small.</p> <p>Click <b>test</b> to test the connection. The system displays a message with the results of the test. Click <b>OK</b> to close the message.</p> |
| Use this host for Survey                    | <p>Uses this server for the Ivanti Service Manager survey component.</p> <p>If you use Windows Authentication for the configuration server, the system prompts you for the Windows domain account and credentials. See "<b>Configuring the Configuration Database</b>" on page 77. This setting is already configured if all Ivanti Service Manager components are installed on one server.</p>                  |
| Use these settings for Reporting            | Uses this server for the Ivanti Service Manager reporting feature.   |



| Parameter                                    | Description   |
|--|---|
| Service                                      | Usually, you configure the reporting feature on the <b>Microsoft SSRS Configuration</b> and <b>Ivanti Reporting Service Configuration</b> pages. However, if you have two different domains and the reporting feature server cannot reach the web server, you can configure these settings to enable the servers to communicate.            |
| Use SSL for Reports                          | (Only if you checked <b>Use these settings for Reporting Service</b> ) Uses SSL for reports.  |
| Use Windows Authentication for SSRS          | (Only if you checked <b>Use these settings for Reporting Service</b> ) Uses Windows authentication for reports. If you plan on sharing the same Microsoft SSRS instance with other applications besides the reporting feature, you must use Windows authentication.   |
| Web Service Virtual Directory                | (Only if you checked <b>Use these settings for Reporting Service</b> ) The name of the web service virtual directory.   |
| Ivanti Web Application Pool Identity Account | (Only if you checked <b>Use these settings for Reporting Service</b> ) The application pool identity for the Ivanti Service Manager web application pool. Select one of the following:<br><br>Keep existing account<br><br>Specify new account<br><br>If you select <b>Specify new account</b> , click <b>Set</b> to enter the credentials. |
| User Name                                    | (Only if you checked <b>Use these settings for Reporting Service</b> and selected <b>Specify new account</b> for the <b>Ivanti Web Application Pool Identity Account</b> field)<br><br>The user name for the application pool identity for the Ivanti Service Manager web application pool.   |
| Password                                     | (Only if you checked <b>Use these settings for Reporting Service</b> and selected <b>Specify new account</b> for the <b>Ivanti Web Application Pool Identity Account</b> field)<br><br>The password associated with the user above. Click <b>OK</b> .   |

4. If you are using Microsoft SQL authentication for the configuration server, the system displays this message: "Local system account will be used for IIS Application Pool Identity and Windows Service". See "Service Account" on page 44 for more information about this account.

To use a different account, do the following:

- a. Check **Use a different account**.
- b. Click **Set**.
- c. Enter the user name for the service account.
- d. Enter the password associated with the service account.
- e. Click **OK**.

- Each tenant in a multiple server deployment must have an administrator account. If you selected **Multiple Server Deployment** on the **Configuration Application** page, click **Previous** to return to the **Ivanti Service Manager Application** page and create additional tenant accounts.

## Configuring Other Feature Settings

On this page you will do the following:

- Specify the log file and temporary file locations on the configuration server.
- Specify different servers and ports and whether to use SSL for the other Ivanti Service Manager servers.
- Specify the inbound web server information.

*Other Feature Settings Page*

**System Configuration Wizard**

1. Configuration Application  
2. Service Manager Application  
3. Application Server Settings  
**4. Other Feature Settings**  
5. Metrics Server  
6. Discovery Application Server  
7. Discovery Web Server

**Configuration Settings**

Log File Location: C:\Logs

Temp Folder Location: C:\Temp

Cache Location: C:\Cache

**Customize Server**

Application Server: SERVER2012 Port: 80  Use SSL

Message Queue Server: SERVER2012 Port: 7200  Use SSL

Integration Service Server: SERVER2012 Port: 80  Use SSL

Discovery Application Server: SERVER2012 Port: 8382  Use SSL

**Inbound Web Service Settings**

Inbound Web Service Server: SERVER2012 Port: 80  Use SSL

Trusted Host & Remote Host Blocked List:

Restart services after setting configuration files.

1. Enter values into the fields:

| Parameter                     | Description   |
|-------------------------------|---|
| <b>Configuration Settings</b> |   |
| Log File Location             | <p>The folder on the server that you are logged into now where the log files are located.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the folder where the log files are located.</p> <p>Browse for a different folder by clicking <b>Browse....</b> Select a new folder and click <b>OK</b>.</p>   |
| Temp Folder Location          | <p>The folder on the server that you are logged into now where the temporary files are located. The temporary folder is used to cache JavaScript files and to enable integration server and Ivanti Service Manager Operations Console features.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the folder where the temporary files are located.</p> <p>Browse for a different folder by clicking <b>Browse....</b> Select a new folder and click <b>OK</b>.</p> |
| Cache Location                | <p>The folder on the server that you are logged into now where the cached files are located.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the folder where the cached files are located.</p> <p>Browse for a different folder by clicking <b>Browse....</b> Select a new folder and click <b>OK</b>.</p>   |
| <b>Customize Server</b>       |   |
| Application Server            | <p>Where the application server is located. The default value is the server that you are logged into now.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name where the application server is located.</p> <p>If you use SSL, you must enter a fully-qualified domain name.</p>  |

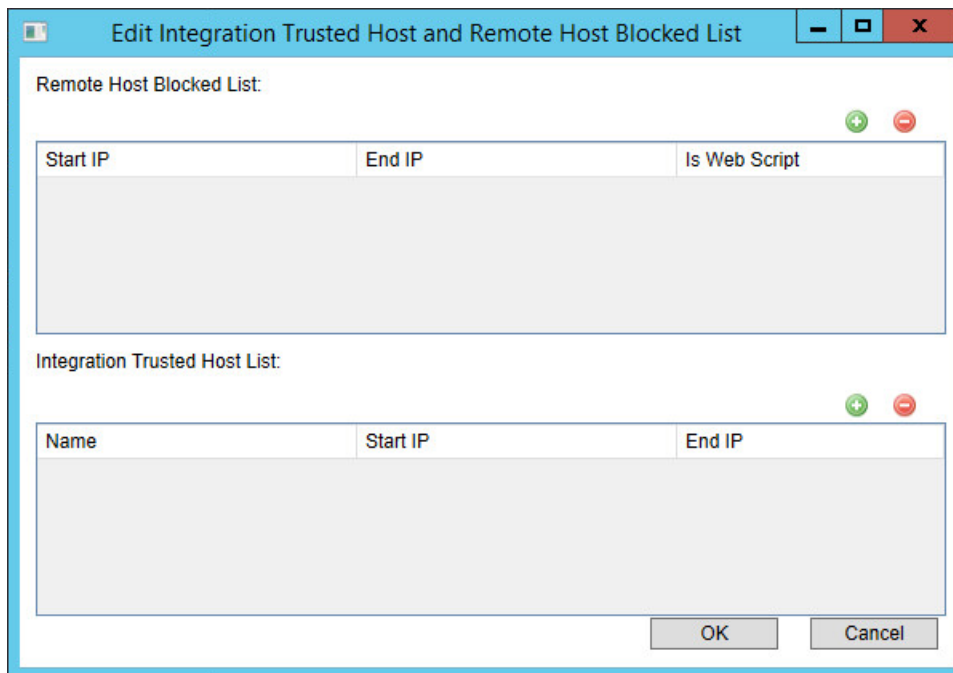
| Parameter                    | Description  |
|------------------------------|--|
|                              | <b>NOTE:</b> If you choose a different server for the application server and check <b>Use SSL</b> , SSL is only enabled for the application server. It does not enable SSL for the configuration server.   |
| Port                         | The port number of the application server. The default is 80, or 443 if you check <b>Use SSL</b> .   |
| Use SSL                      | Enables SSL encryption to the application server.  |
| Message Queue Server         | Where the message queue server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:<br>Accept the default value.<br>Enter the name where the Ivanti Service Manager message queue server is located.<br><br>If you use SSL, you must enter a fully-qualified domain name. |
| Port                         | The port number of the message queue server. The default is 7200.  |
| Use SSL                      | Enables SSL encryption to the message queue server.  |
| Integration Server           | Where the integration server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:<br>Accept the default value.<br>Enter the server where the Ivanti Service Manager integration server is located.<br><br>If you use SSL, you must enter a fully-qualified domain name.   |
| Port                         | The port number of the Ivanti Service Manager integration server. The default is 80, or 443 if you check <b>Use SSL</b> .  |
| Use SSL                      | Enables SSL encryption to the Ivanti Service Manager integration server.   |
| Discovery Application Server | Where the Discovery application server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:<br>Accept the default value.<br>Enter the server where the Discovery application server is located.   |

| Parameter                           | Description  |
|-------------------------------------|--|
|                                     | If you use SSL, you must enter a fully-qualified domain name.  |
| Port                                | The port number of the Discovery application server. The default is 8382, or 443 if you check <b>Use SSL</b> .   |
| Use SSL                             | Enables SSL encryption to the Discovery application server.  |
| <b>Inbound Web Service Settings</b> |  |
| Inbound Web Server                  | Where the inbound web server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:<br>Accept the default value.<br>Enter the server where the Ivanti Service Manager inbound web server is located.<br><br>If you use SSL, you must enter a fully-qualified domain name. |
| Port                                | The port number of the Ivanti Service Manager inbound web server. The default is 80, or 443 if you check <b>Use SSL</b> .  |
| Use SSL                             | Enables SSL encryption to the Ivanti Service Manager inbound web server.   |

You can set a list of remote hosts to block and a list of remote hosts to trust. By default, the list is empty.

2. To designate a list of blocked servers, do the following:
  - a. Next to the **Trusted Host & Remote Host Blocked List** field, click **Set**.
  - b. In the **Remote Host Blocked List** area, click the plus icon.
  - c. Enter the starting IP address and the ending IP address for the blocked servers.
  - d. If you are blocking web scripts, check **Is Web Script**.
  - e. Click **OK**.
3. To designate a list of trusted servers, do the following:
  - a. Next to the **Trusted Host & Remote Host Blocked List** field, click **Set**.
  - b. In the **Integration Trusted Host List** area, click the plus icon.
  - c. Enter a name for the trusted host list.
  - d. Enter the starting IP address and the ending IP address for the trusted servers.
  - e. Click **OK**.

*Edit Integration Trusted Host and Remote Host Blocked List Dialog Box*



To update the list at a later time, run the System Configuration Wizard, advance to the **Other Feature Settings** page, click **Set**, and make your changes. When you are done, click **OK**.

4. To restart the Ivanti Service Manager services after you exit the System Configuration Wizard, check **Restart services after setting configuration files**.
5. Verify that the Ivanti Service Manager services restart after the wizard closes.
6. If you did not check **Restart services after setting configuration files**, restart the Ivanti Service Manager services manually.
7. Click **Next**. The system displays the **Metrics Server** page.

## Configuring the Metrics Server

Perform these steps to configure one or more Metrics Server databases, which you can use to analyze data. Your deployment can have multiple Metrics Server databases to improve performance.

On this page, you will do the following:

- Specify the locations for the log file and the configuration server.
- Map applications to the Metrics Server.

*Metrics Server Page*

1. Enter values into the fields:

| Parameter                         | Description  |
|-----------------------------------|--|
| Metrics Cache Database Connection |  |
| Database Server Name              | <p>Where the metrics cache database server is located. The default value is the server where the application server is located.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the server of the metrics cache database.</p> <p>Browse for a server name by clicking the down arrow and selecting <b>&lt;Browse for more...&gt;</b>. The system displays all available database servers in the network for your connection. Choose a server and click <b>OK</b>.</p> <p><b>NOTE:</b> Do not choose <b>localhost</b> unless you are setting up a "Demonstration or Proof-of-Concept Deployment" on page 7.</p> |
| Database Name                     | The name of the metrics cache database.  |

| Parameter             | Description   |
|-----------------------|---|
|                       | <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the metrics cache database.</p>   |
| Authentication Method | <p>Select one of the following:</p> <p><b>Windows Authentication:</b> Uses Microsoft Windows authentication.</p> <p><b>SQL Authentication:</b> Uses Microsoft SQL authentication. If you select this option, enter the user name and password below.</p> <p><b>NOTE:</b> The metrics cache database server is not compatible with SSL if your system has Windows authentication set up.</p> |
| User Name             | (Only if you selected <b>SQL Authentication</b> ) The user name associated with the Microsoft SQL authentication.   |
| Password              | (Only if you selected <b>SQL Authentication</b> ) The password associated with the user name for the Microsoft SQL authentication.  |

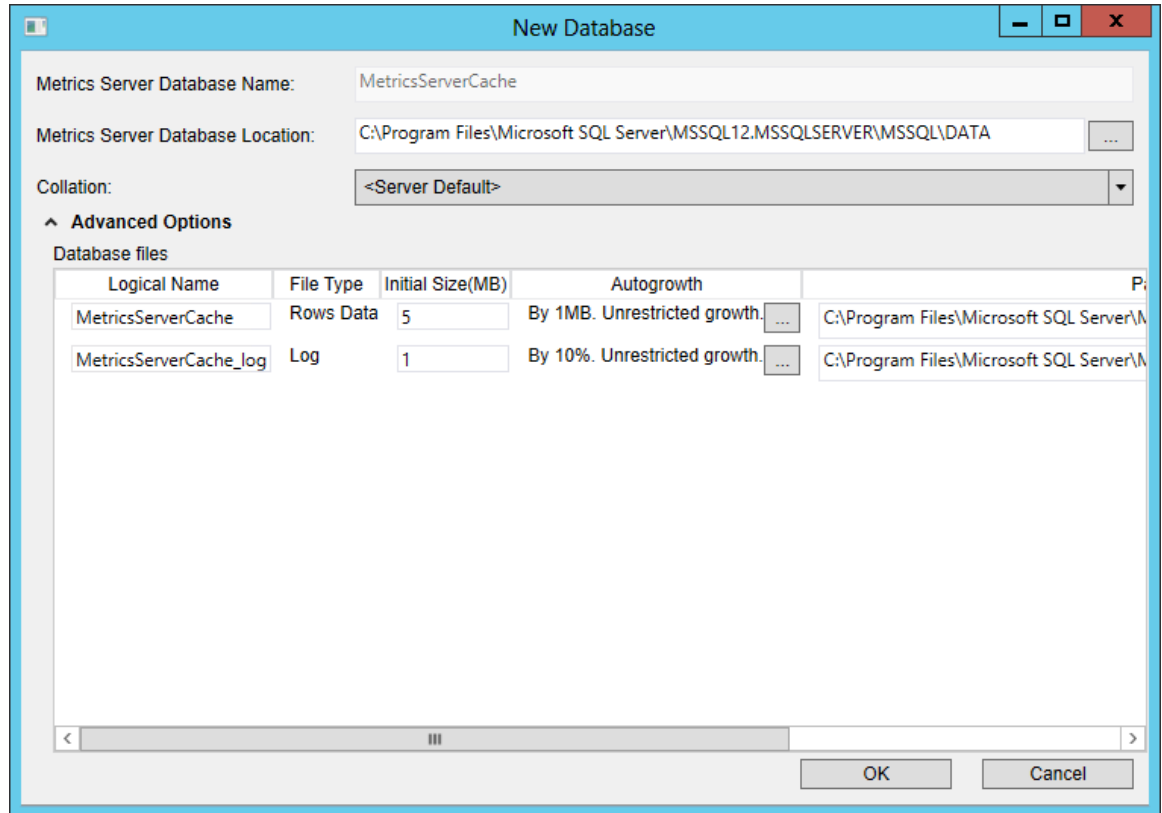
2. Click **Test Connection** to test the connection to the metrics cache database server. The system displays a success or failure message below the **Test Connection** button. You must have a working connection to create a database. You cannot continue with the configuration if this connection does not work.
3. Do one of the following:
  - If this is the initial setup, go to "Creating a New Metrics Server Database" below.
  - If your system already has a metrics server database, go to "Recreating the Metrics Server Database" on page 103.

## Creating a New Metrics Server Database

An initial installation does not have a metrics server database. Follow these steps to create one.

1. Click **Create & Load Metrics Server DB**. The system displays the **New Database** dialog box.  
*New Database Dialog Box*





2. In the **Location** field, select a location for the metrics server database.
3. Click **Advanced Options** to view and reconfigure these metrics server database settings:
  - **Logical name:** The logical name of the metrics database. This name is stored as a file name, and is a separate entity from the read-only database name that is displayed in Microsoft SQL Server Management Studio.
  - **File type:** The file type, either database records or database logs. These values are read-only.
  - **Initial size in MB:** The initial file size, in MB, when creating the metrics database.
  - **Autogrowth size:** Specifies how the database will expand when it reaches its maximum file size. We recommend having at least 1 GB or 10% to start with. Click ... to update the values.
  - **The location of the database:** The location of the file. Click ... to update the location.
  - **File name:** The name of the file.
4. Click **OK** in the **New Database** dialog box.

The **Configuration Server Location** field indicates the location of the system that hosts the configuration server. The default value is the name of the host that you are logged into now.

5. If this is the system that hosts the configuration server, accept the default value.  
If the host that you are logged into now is not the configuration server, enter the machine name or fully-qualified domain name of your configuration server.  
If you use SSL, you enter the fully-qualified domain name of the configuration server.
6. Enter the port number in the **Port** field. The default value is 80. If you click **Use SSL**, it changes to 443.
7. Select whether to use SSL for connections to the configuration server.  
If you use SSL, you must provide a fully-qualified domain name in the **Configuration Server Location** field.
8. Click **Test Connection** to test the connection to the configuration server. A pop-up message notifies you of success or failure.



We do not recommend enabling SSL on the configuration server until you have fully tested Ivanti Service Manager to ensure that it works with SSL.

For information on configuring Ivanti Service Manager with SSL, see "Optional SSL Configuration" on page 129.

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9. Enter the following information to register a server in a multi-server deployment to the metrics server database:
  - Accept the default server name or enter a different name.
  - Optional. Enter a description of the server.
  - The default server name value is the name of the host that you are logged into now. You must use this name or localhost.
  - Check the box to use SSL encryption.
  - Check the box to enable this metrics server.
10. Click **Save**.
11. To map an application to the new metrics server to an application, check **Map**. You can reference the same metrics server to multiple Ivanti Service Manager applications.



To change this server at a later time, run the System Configuration Wizard, advance to the **Metrics Server** page, and click **Remove**.

---

12. Click **Next**. The system displays the **Discovery Application Server** page.

## Recreating the Metrics Server Database

If you are upgrading or repairing Ivanti Service Manager, you already have a metrics server database, and the **Metrics Server** page looks like "Metrics Server Page" below.

*Metrics Server Page*

1. To recreate the metrics server database, click **Re-Create & Load Metrics Server DB**. The system displays the **New Database** dialog box.
2. Perform steps 2 through 12 in "Creating a New Metrics Server Database" on page 100.



If you have customized the existing metrics server database, specify a different location in the **Metrics Server Database Location** field in the **New Database** dialog box. Otherwise, the system overwrites your customization when you load the recreated database.

## Configuring the Discovery Application Server

On this page you will specify information about the configuration of the Discovery application server and the Discovery configuration database. Follow these steps:

- "Starting the Configuration for the Discovery Application Server" below
- "Configuring a System without a Discovery Configuration Database (Creating a New One)" on page 107
- "Configuring a System with a Discovery Configuration Database (Editing One that Already Exists)" on page 108

## Starting the Configuration for the Discovery Application Server

The first time that you see this page, there is no Discovery configuration database, as shown in "Discovery Application Server Page: No Database" below.

*Discovery Application Server Page: No Database*

1. Enter values into the fields:

| Parameter            | Description   |
|----------------------|---|
| Configuration Server | The host name or fully-qualified domain name of the configuration server. The default value is the name of the host that you are logged into now.<br>Do one of the following: |

| Parameter | Description  |
|-----------|--|
|           | <p>Accept the default value.</p> <p>Enter the name of the server of the configuration server.</p> <p>If you use SSL, you must enter a fully-qualified domain name.</p> |
| Port      | The port number of the configuration server. The default is 80, or 443 if you check <b>Use SSL</b> .   |
| Use SSL   | Enables SSL encryption to the configuration server.  |

- Click **Test Connection** to test the connection to the configuration server. The system displays a success or failure message. Click **OK** to close the message. You must have a working connection to the server. You cannot continue with the configuration if this connection does not work.
- Enter values into the fields:

| Parameter                    | Description   |
|------------------------------|---|
| Log File Location            | <p>The folder on the server that you are logged into now where the log files are located. The default location for the log files is C:\Logs.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the folder where the log files are located.</p> <p>Browse for a different folder by clicking <b>Browse...</b> Select a new folder and click <b>OK</b>.</p> |
| Message Queue Server         | <p>Where the Ivanti Service Manager message queue server is located. The default value is the server that you are logged into now.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name where the Ivanti Service Manager message queue server is located.</p> <p>If you use SSL, you must enter a fully-qualified domain name.</p>                              |
| Port                         | The port number of the Ivanti Service Manager message queue server. The default is 7200.  |
| Use SSL                      | Enables SSL encryption to the Ivanti Service Manager message queue server.  |
| Discovery Application Server | Where the Discovery application server is located. The default value is the server that you are logged into now.  |

| Parameter                       | Description  |
|---------------------------------|--|
|                                 | <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name where the Discovery application server is located.</p> <p>If you use SSL, you must enter a fully-qualified domain name.</p>   |
| Port                            | The port number of the Discovery application server. The default is 80, or 443 if you check <b>Use SSL</b> .   |
| Use SSL                         | Enables SSL encryption to the Discovery application server.  |
| <b>Discovery Database Setup</b> |  |
| Database Server                 | <p>The name of the system proposed for the Discovery configuration database. The default value is the server that you are logged into now.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the Discovery configuration database server.</p> <p>Browse for a server name by clicking the down arrow and selecting <b>&lt;Browse for more...&gt;</b>. The system displays any Microsoft SQL Server instances in your network. Choose a server and click <b>OK</b>.</p> |
| Database Name                   | The name of the Discovery configuration database. The default name is HEATDiscoveryConfig and you cannot change the name.  |
| Authentication Method           | <p>There are two authentication methods for the Discovery configuration database, one for creation and one for access.</p> <p>Select the authentication method for creating the Discovery configuration database:</p> <p><b>Windows Authentication:</b> Uses Microsoft Windows authentication.</p> <p><b>SQL Authentication:</b> Uses Microsoft SQL authentication. If you select this option, enter the user name and password below.</p>   |
| User Name                       | (Only if you selected <b>SQL Authentication</b> ) The user name associated with the Microsoft SQL authentication.  |
| Password                        | (Only if you selected <b>SQL Authentication</b> ) The password associated with the user name for the Microsoft SQL authentication.   |

- Click **Test Connection** to test the connection to the Discovery configuration database server. The system displays a success or failure message. Click **OK** to close the message. You must have a working connection to create a database. You cannot continue with the configuration if this connection does not work.
- Do one of the following:

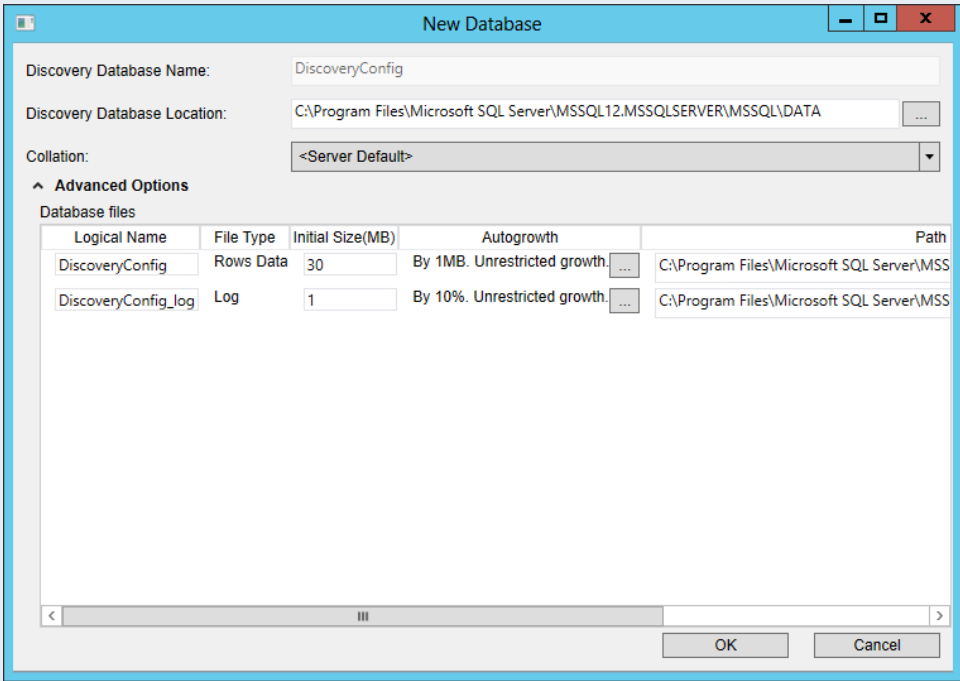
- If this is the initial setup, go to "Configuring a System without a Discovery Configuration Database (Creating a New One)" below.
- If your system already has a Discovery configuration database, go to "Configuring a System with a Discovery Configuration Database (Editing One that Already Exists)" on the next page.

## Configuring a System without a Discovery Configuration Database (Creating a New One)

An initial installation does not have a Discovery configuration database. The system displays this: "No Discovery (HEATDiscoveryConfig) Database is detected."

Follow these steps to create one.

1. Enter values into the fields:

| Parameter                  | Description   |
|----------------------------|---|
| Create & Load Discovery DB | <p>Click to create and load a new Discovery configuration database. The system displays the <b>New Database</b> dialog box.</p> <p><i>New Database Dialog Box</i></p>  |
| Discovery Database Name    | The name of the Discovery configuration database. The default name is HEATDiscoveryConfig and you cannot change the name.   |
| Discovery                  | The location for the Discovery configuration database.  |

| Parameter         | Description  |
|-------------------|--|
| Database Location |  |
| Collation         | The set of rules that describe how to compare and sort strings, such as the order in which letters are sorted and whether case matters.  |
| Advanced Options  |  |
| Logical Name      | The logical name of the Discovery configuration database. This name is stored as a file name, and is a separate entity from the read-only database name that is displayed in Microsoft SQL Server Management Studio. |
| File Type         | The file type, either database records or database logs. These values are read-only.   |
| Initial Size (MB) | The initial file size, in MB, when creating the Discovery configuration database.  |
| Autogrowth        | Specifies how the database will expand when it reaches its maximum file size. We recommend having at least 1 GB or 10% to start with. Click ... to update the values.  |
| Path              | The location of the file. Click ... to update the location.  |
| File Name         | The name of the file.  |

2. Click **OK** in the **New Database** dialog box. The system creates the Discovery configuration database.
3. To restart the Ivanti Service Manager services after you finish the installation, check **Restart services after setting configuration files..**
4. Click **Next**. The system displays the **Discovery Web Server** page.

## Configuring a System with a Discovery Configuration Database (Editing One that Already Exists)

If you are upgrading or repairing Ivanti Service Manager, you already have a Discovery configuration database.

1. To recreate the Discovery configuration database, click **Re-Create & Load Discovery DB**. The system displays a confirmation message.



If you have customized the existing Discovery configuration database, specify a different location in the **Discovery Database Location** dialog box. Otherwise, the system overwrites your customization when you recreate the database.

2. Click **OK** at the confirmation message.
3. To restart the Ivanti Service Manager services after you finish the installation, check **Restart services after setting configuration files..**
4. Click **Next**. The system displays the **Discovery Web Server** page.



## Configuring the Discovery Web Server

Configure the relationship between Ivanti Service Manager, the Discovery web server, and the Discovery application server from the **Discovery Web Server** page of the System Configuration Wizard.

The system displays the **Discovery Web Server** page. See "Discovery Web Server Page" below.

*Discovery Web Server Page*

**System Configuration Wizard**

1. Configuration Application  
2. Service Manager Application  
3. Application Server Settings  
4. Other Feature Settings  
5. Metrics Server  
6. Discovery Application Server  
7. Discovery Web Server

**Discovery Web Server Configuration**

Configuration Server: SERVER2012 Port: 80  Use SSL [Test Connection](#)

Application Server: SERVER2012 Port: 80  Use SSL

Discovery Application Server: SERVER2012 Port: 8382  Use SSL

Discovery Web Server: SERVER2012 Port: 80  Use SSL

MDI Server: SERVER2012 Port: 8734

Message Queue Server: SERVER2012 Port: 7200  Use SSL

Log File Location: C:\Logs [Browse...](#)

Windows Integrated Security is detected on the Configuration Server. The service account for the IIS application pools and Windows services needs a Windows domain account.

Service Account: administrator [Set...](#)

Restart services after setting configuration files.

<<Previous [Finish](#)

1. Enter values into the fields:

| Parameter            | Description   |
|----------------------|---|
| Configuration Server | <p>The host name or fully-qualified domain name of the configuration server. The default value is the name of the host that you are logged into now.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Accept the default value.</li> <li>Enter the name of the server of the configuration server.</li> </ul> |

| Parameter | Description  |
|-----------|--|
|           | If you use SSL, you must enter a fully-qualified domain name.  |
| Port      | The port number of the configuration server. The default is 80, or 443 if you check <b>Use SSL</b> . |
| Use SSL   | Enables SSL encryption to the configuration server.  |

2. Click **Test Connection** to verify the connection to the configuration server.
3. Enter values into the fields:

| Parameter                    | Description   |
|------------------------------|---|
| Application Server           | Where the application server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:<br>Accept the default value.<br>Enter the name where the application server is located.<br><br>If you use SSL, you must enter a fully-qualified domain name.                     |
| Port                         | The port number of the application server. The default is 80, or 443 if you check <b>Use SSL</b> .  |
| Use SSL                      | Enables SSL encryption to the application server.   |
| Discovery Application Server | Where the Discovery application server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:<br>Accept the default value.<br>Enter the name where the Discovery application server is located.<br><br>If you use SSL, you must enter a fully-qualified domain name. |
| Port                         | The port number of the Discovery application server. The default is 8382, or 443 if you check <b>Use SSL</b> .  |
| Use SSL                      | Enables SSL encryption to the Discovery application server.   |
| Discovery Web Server         | Where the Discovery web server is located. The default value is the server that you are logged into now.<br><br>Do one of the following:  |

| Parameter            | Description  |
|----------------------|--|
|                      | <p>Accept the default value.</p> <p>Enter the name where the Discovery web server is located.</p> <p>If you use SSL, you must enter a fully-qualified domain name.</p>   |
| Port                 | The port number of the Discovery web server. The default is 80, or 443 if you check <b>Use SSL</b> .   |
| Use SSL              | Enables SSL encryption to the Discovery web server.  |
| MDI Server           | <p>Where the MDI server is located. (The Mobile Device Inventory [MDI] service is bundled with Discovery.) The default value is the server that you are logged into now.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name where the MDI server is located.</p>   |
| Port                 | The port number of the MDI server. The default is 8734.  |
| Message Queue Server | <p>Where the message queue server is located. The default value is the server that you are logged into now.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name where the Ivanti Service Manager message queue server is located.</p> <p>If you use SSL, you must enter a fully-qualified domain name.</p>  |
| Port                 | The port number of the Ivanti Service Manager message queue server. The default is 7200.   |
| Use SSL              | Enables SSL encryption to the Ivanti Service Manager message queue server.   |
| Log File Location    | <p>The folder on the server that you are logged into now where the log files are located. The default location for the log files is C:\Logs on the Discovery web server.</p> <p>Do one of the following:</p> <p>Accept the default value.</p> <p>Enter the name of the folder where the log files are located.</p> <p>Browse for a different folder by clicking <b>Browse...</b>. Select a new folder and click <b>OK</b>.</p> |

- To restart the Ivanti Service Manager services after you exit the System Configuration Wizard, check **Restart services after setting configuration files**.
- Verify that the Ivanti Service Manager services restart after the wizard closes.

6. If you did not check **Restart services after setting configuration files**, restart the Ivanti Service Manager services manually.

## Finishing the System Configuration

When you have finished configuring the ISM Discovery web server, do the following:

1. Click **Finish**. The System Configuration Wizard closes and the system displays the **Completed** page of the install wizard.
2. Click **Finish**.
3. Restart the host server that you just configured.
4. Verify that you can access Ivanti Service Manager by navigating to `http://server_name/HEAT`.

## Installing the Demo Data Package

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Only perform this procedure if you did NOT check **Don't include Demo data** on the **Ivanti Service Manager Application** page of the System Configuration Wizard. See "Configuring the Ivanti Service Manager Application" on page 83 for information about the **Ivanti Service Manager Application** page.

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Ivanti Service Manager comes with additional transaction database that you can use to test and view the analytic metrics, financial, IT Financial Management, and other Ivanti Service Manager features.

Follow these steps to install the demo data package:

1. Navigate to: `C:\Program Files\HEAT\Software\HEAT\SystemConfigurationWizard\DB\AppServer\SQL\DemoData`.
2. Extract the Demo Data Pkg.rar file.
3. Use Microsoft SQL Management Studio to restore the file called `DemoData_Database.bak`. This file was created based on Microsoft SQL Release 2008 R2.
4. Back up the current Ivanti Service Manager database.
5. Use Microsoft SQL Management Studio to open the script called `Demo Data Transfer Script.sql`. The script updates the names of the source and target databases, based on your environment.
6. Use Microsoft SQL Management Studio to run the script called `Demo Data Transfer Script.sql`.
7. Use Microsoft SQL Management Studio to open the script called `ITFM Demo Data Update.sql`. The script updates the IT Financial Management dates in the database.
8. Use Microsoft SQL Management Studio to run the script called `ITFM Demo Data Update.sql`.

## Configuring the Reporting Feature

If your Ivanti Service Manager deployment includes the reporting feature, you need to set up authentication. Authentication is only needed for the reporting feature, and not for deployments that do not use the reporting feature.

- "Authenticating the Application Database" below
- "Configuring Microsoft SSRS" on the next page
- "Configuring the Reporting Feature" on page 118

## Authenticating the Application Database

When you configure Ivanti Service Manager, you set the authentication for the application database on the **Ivanti Service Manager Application** page of the System Configuration Wizard, as shown in "Ivanti Service Manager Application Settings" below.

*Ivanti Service Manager Application Settings*

### Application Settings

Application Database Server:

Application Database Name:

Windows Authentication  
 SQL Authentication

User Name:

Password:

**Connection successful!**

You can select either **Windows Authentication** or **SQL Authentication**. (When you configure the reporting feature, you have an opportunity to review and change the authentication method, if necessary, on the **Microsoft SSRS Configuration** page. See "Configuring the Reporting Feature" on page 118.)

- If you select **Windows Authentication**, you can use the Microsoft SSRS service account, the Microsoft IIS app pool identity account, or any other account, but they must have permission to access the application database and the Microsoft SSRS database.
- If you select **SQL Authentication**, you can use a different system account.

We recommend having separate authentication for Microsoft SSRS, the application database, and the Microsoft SSRS database.

## Configuring Microsoft SSRS

Microsoft SSRS Configuration Page

1. Enter values into the fields:

| Parameter               | Description   |
|-------------------------|---|
| Report Server Host      | The name of the Ivanti Service Manager reporting feature server. The default name is the name of the server that you are currently logged into. You cannot change this value. |
| Microsoft SSRS Instance | The instance of Microsoft SSRS to use for the Reporting feature. Select a value from the drop-down list.  |

2. (Recommended) Click **Backup** to back up your Microsoft SSRS configuration. (If prompted, enter a password to unlock the backup file, and then click **OK**.) The system displays the **New SSRS Configuration Backup** dialog box with information about the backup.

*New SSRS Configuration Backup Dialog Box*

**New SSRS Configuration Backup**

Current SSRS Information

SQL Server Instance: MSSQLSERVER  
Report Server Service Account:  
Password: \*\*\*\*\*  
Web Service Virtual Directory: ReportServer  
Report Manager Virtual Directory: Reports  
SQL Server Name: DBSERVER  
Database Name: ReportServer  
Credential: Service Account  
Login:  
Password: \*\*\*\*\*  
SMTPServer:  
SenderAddress:

Backup Path:  
C:\SSRSBackup\20170109125606

Description:  
[Manually] Description of this backup.

3. To change the location of the backup, click **Browse...**, select a new location, and click **OK**.
4. Click **OK** to close the dialog box. The system displays the **Backup Encryption Key** dialog box. (If you do not see this dialog box immediately, the system displays it after you click **Next** at the bottom of the page when you are done with the configuration on this page of the System Configuration Wizard.)
5. Do the following:
  - (Optional) Enter a new file location.
  - Enter a password.
  - Confirm the password.
  - Click **OK**.
6. Select a Microsoft SSRS authentication type:
  - **Windows Authentication:** Shares the Microsoft SSRS instance with multiple applications, including Ivanti Service Manager.
  - **Custom Authentication:** Does not share the Microsoft SSRS instance with any other applications. The Microsoft SSRS instance is used for Ivanti Service Manager only. With custom authentication, you can have a multi-tenant environment.

If you have multiple instances of Microsoft SSRS, choose each instance carefully before choosing the authentication method to use with that instance.

- If you plan to share the same Microsoft SSRS instance with other applications besides the reporting feature, you must use Windows authentication.
- If you plan to create a multiple-tenant environment, you must use custom authentication.
- If you plan to use a dedicated Microsoft SSRS instance only for the reporting feature, you can use either Microsoft SSRS authentication type.

If you select a Microsoft SSRS instance and select **Custom Authentication**, the System Configuration Wizard overwrites the existing Microsoft SSRS configuration.



If the Microsoft SSRS instance that you selected is shared with another application, the Ivanti Service Manager installer deletes the configuration for that application. Before proceeding, be sure that the Microsoft SSRS instance is not in use by another application.

7. Enter values into the fields:

| Parameter                     | Description  |
|-------------------------------|--|
| Service Account               | Select the service account to use. This can be the same account that is used for the IIS application pool identity and the Windows service, that you entered on the <b>Application Server Settings</b> page. You can select one of the following:<br><br><b>Use built-in account</b> (NOTE: You cannot select this option if you selected <b>Windows Authentication</b> for the Microsoft SSRS authentication type in step 5.)<br><br><b>Use another account</b>             |
| Use built-in account          | (Only if you selected <b>Use built-in account</b> ) Select the built-in account to use. This can be the same account that is used for the IIS application pool identity and the Windows service, that you entered on the <b>Application Server Settings</b> page. You can select one of the following:<br><br><b>Local System:</b> This account has the most permissions.<br><br><b>Network Service:</b> We recommend that you use this account.<br><br><b>Local Service</b> |
| Account                       | (Only if you selected <b>Use another account</b> ) The name of the service account. Use the format domain/name.  |
| Password                      | (Only if you selected <b>Use another account</b> ) The password associated with the service account.   |
| Web Service Virtual Directory | The name of the web service virtual directory. The system automatically fills in this field with the value that you entered in the <b>Web Service Virtual Directory</b> field on the <b>Application Server Settings</b> page. See "Configuring the Application Server Settings" on page 90.  |



| Parameter                        | Description   |
|----------------------------------|---|
|                                  | <p>The default value for the web service virtual directory is <b>ReportServer + _SSRS_instance_name</b>.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Accept the default value.</li> <li>Enter a new value.</li> </ul> <p>Click <b>Advanced...</b> to configure multiple identities for the reporting feature web service.</p>  |
| Report Manager Virtual Directory | <p>The name of the report manager virtual directory. The default value is <b>Reports + _SSRS_instance_name</b>.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Accept the default value.</li> <li>Enter a new value.</li> </ul> <p>Click <b>Advanced...</b> to configure multiple identities for the report manager.</p>  |
| Database Server                  | <p>The name of the database server. The system automatically displays the default Microsoft SQL server name.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Accept the default value.</li> <li>Enter the name of the server of the configuration database in this format: <code>machinename\instance</code>.</li> </ul> <p>Browse for a server name by clicking the down arrow and selecting <b>&lt;Browse for more...&gt;</b>. The system displays any Microsoft SQL Server instances in your network. Choose a server and click <b>OK</b>.</p> <p><b>NOTES:</b></p> <ul style="list-style-type: none"> <li>Do not choose <b>localhost</b> unless you are setting up a "Demonstration or Proof-of-Concept Deployment" on page 7.</li> <li>To restore the Microsoft SQL server name if you changed the name previously, open Microsoft SQL Server Management Studio. The system displays the Microsoft SQL server name in the <b>Connect to Server</b> dialog box.</li> </ul> |
| Database Name                    | The name of the reporting database. The default name is <b>ReportServer + \$SSRS_instance_name</b> .  |
| Credentials                      | The credentials to use with the reporting feature. Select one of the following:   |

| Parameter | Description  |
|-----------|--|
|           | SQL Server Credentials<br>Windows Credentials<br>Service Credentials         |
| User Name | The user name for the credential used with the reporting feature.            |
| Password  | The password associated with the credential used with the reporting feature. |

8. Click **Test Connection**. The system displays *Connection successful!* if the connection is good.

9. Enter values into the fields:

| Parameter      | Description   |
|----------------|---|
| SMTP Server    | The server that sends out the reports. The system automatically verifies the SMTP server name that you enter. If the name is not valid, the system displays an error message. |
| Sender Address | The email address for the account that sends out the reports.   |

10. Click **Next**. The system displays the **Ivanti Reporting Service Configuration** page. See "Configuring the Reporting Feature" below. (If the system displays the Backup Encryption Key dialog box, see step 5.)

## Configuring the Reporting Feature

You configure the reporting feature on the **Reporting Service Configuration** page. See "Reporting Service Configuration Page" below.

*Reporting Service Configuration Page*

1. Enter values into the fields:

| Parameter            | Description   |
|----------------------|---|
| Configuration Server | <p>The host name of the configuration server. The default value is the name of the server that you are logged into now.</p> <p>If the host that you are logged into now is <i>not</i> the configuration server, enter the machine name or fully-qualified domain name of your configuration server.</p> <p>If you check <b>Use SSL</b> below, you must enter the fully-qualified domain name of the configuration server.</p> |
| Port                 | The port number of the configuration server. The default is 80, or 443 if you check <b>Use SSL</b> .  |
| Use SSL              | <p>Check to use SSL for connections to the configuration server.</p> <p><b>NOTE:</b> We do not recommend enabling SSL on the configuration server until you have fully tested Ivanti Service Manager to ensure that it works with SSL. For information on configuring Ivanti Service Manager with SSL, see "Optional SSL Configuration" on page 129.</p>  |

2. Click **Test Connection** to test the connection to the configuration server. The system displays a success or failure message. Click **OK** to close the message.
3. Enter values into the fields:

| Parameter    | Description   |
|--------------|---|
| Account Type | The database account type. Select from one of the following:<br>SQL Server Credentials<br>Windows Credentials<br><br><b>NOTE:</b> If you selected <b>Custom Authentication</b> in step 6 of "Configuring Microsoft SSRS" on page 114, this option automatically displays as <b>SQL Server Credentials</b> and you cannot change it. |
| User Name    | The user name for the Ivanti Service Manager database read-only account.  |
| Password     | The password associated with the user name.   |

4. Click **Test Connection** to test the connection to the configuration server. The system displays *Connection successful!* if the connection is good.
5. Click **Modify** to add servers to or remove servers from the list of Ivanti Service Manager application servers that are used with the reporting feature.



If you have multiple domains in your deployment, the reporting server may not be able to connect to the web server. In this case, remove the server from the list and configure reporting manually.

6. Enter values into the fields:

| Parameter            | Description  |
|----------------------|--|
| Report User Name     | (Only if you selected <b>Custom Authentication</b> in step 6 of "Configuring Microsoft SSRS" on page 114) The user name for the user who configures the reporting feature. |
| Report User Password | (Only if you selected <b>Custom Authentication</b> in step 6 of "Configuring Microsoft SSRS" on page 114) The password associated with the user name.                      |

7. To verify that the configuration settings work, do the following:
  - a. Click **Reprovision Report Now** to update the sample report data to the application. See "Reporting Service Configuration Page" on page 118. If the systems returns an exception such as "Cannot Decrypt the Symmetric Key", see "Troubleshooting" on page 175.
  - b. Log into Ivanti Service Manager as a Report Manager.

- c. Ensure that you can see the sample reports and create one.
8. When you see confirmation that the out-of-the-box reports have been provisioned, that is, the last line of this step changes from *OOB Reports (not provisioned yet)* to *OOB Reports (provisioned on date)*, click **Finish** to close the System Configuration Wizard.

The system displays the **Completed** page of the System Configuration Wizard.



If the system displays an error message that the system failed to configure reporting for a Ivanti Service Manager application server, ensure that you checked **Use these settings for Reporting Service** on the **Application Server Settings** page.

---

9. Restart your system (the host server that you just configured).
10. After the system restarts, ensure that you can access Ivanti Service Manager. Go to `http://server_name/HEAT` and ensure that the reporting feature is functional.

## Configuring Discovery

This topic describes how to configure Discovery.

- "Configuring Discovery on a Dedicated Server" below
- "Configuring Discovery on the Production Servers" on page 123

### Configuring Discovery on a Dedicated Server

After you have installed the Discovery components, the System Configuration Wizard automatically starts and displays the **Configuration Application** page.

1. On the **Configuration Application** page, do the following:
  - a. Under **Target Environment**, choose **Single Server Deployment**.
  - b. Under **Setup Connection**, verify that the configuration matches the settings that you configured for the Ivanti Service Manager production servers. See "Configuring the Configuration Database" on page 77.
  - c. Click **Next**.
2. On the **Service Manager Application** page, do the following:
  - a. Verify that the configuration matches the settings that you configured for the Ivanti Service Manager production servers. See "Configuring the Ivanti Service Manager Application" on page 83.
  - b. Check **Discovery Stand alone**.
  - c. Click **Next**.

3. On the **Application Server Settings** page, do the following:
  - a. Verify that the configuration matches the settings that you configured for the Ivanti Service Manager production servers.
  - b. Click **Next**.
4. On the **Other Features Settings** page, do the following:
  - a. Under **Customize Server**, in the **Discovery Application Server** field, enter the name of the Discovery dedicated server.
    - If you are not using SSL, enter the host name.
    - If you are using SSL, enter the fully-qualified domain name.
  - b. Verify that the rest of the configuration matches the settings that you configured for the Ivanti Service Manager production servers. See "Configuring Other Feature Settings" on page 94.
  - c. Click **Next**.
5. On the **Metrics Server** page, do the following:
  - a. Verify that the configuration matches the settings that you configured for the Ivanti Service Manager production servers. See "Configuring the Metrics Server" on page 98.
  - b. Click **Next**.
6. On the **Discovery Application Server** page, do the following:
  - a. In the **Discovery Application Server** field, enter the name of the Discovery dedicated server.
    - If you are not using SSL, enter the host name.
    - If you are using SSL, enter the fully-qualified domain name.
  - b. Verify that the rest of the configuration matches the settings that you configured for the Ivanti Service Manager production servers. See "Configuring the Discovery Application Server" on page 103.
  - c. Click **Next**.
7. On the **Discovery Web Server** page, do the following:
  - a. In the **Discovery Application Server** field, enter the name of the Discovery dedicated server.
    - If you are not using SSL, enter the host name.
    - If you are using SSL, enter the fully-qualified domain name.

- b. Verify that the rest of the configuration matches the settings that you configured for the Ivanti Service Manager production servers. See "Configuring the Discovery Web Server" on page 109.
- c. Click **Finish**.

The system displays the **Completed** page of the System Configuration Wizard.

8. Restart your system (the host server you just configured).
9. After the system restarts, ensure that you can access Ivanti Service Manager. Go to `http://server_name/HEAT` and ensure that the system is functional.

## Configuring Discovery on the Production Servers

Now that there is a dedicated Discovery server in your deployment, you must configure your production servers to recognize it.

On each production server in your deployment, do the following:

1. Go to the Windows apps menu and click **System Configuration Wizard**. The system opens the System Configuration Wizard and displays the **Configuration Application** page.
2. On the **Configuration Application** page, click **Next**.
3. On the **Ivanti Service Manager Application** page, click **Next**.
4. On the **Application Server Settings** page, click **Next**.
5. On the **Other Features Settings** page, do the following:
  - a. In the **Discovery Application Server** field, enter the name of the Discovery dedicated server.
    - If you are not using SSL, enter the host name.
    - If you are using SSL, enter the fully-qualified domain name.
  - b. Click **Next**.
6. On the **Metrics Server** page, click **Next**.
7. On the **Discovery Application Server** page, do the following:
  - a. In the **Discovery Application Server** field, enter the name of the Discovery dedicated server.
    - If you are not using SSL, enter the host name.
    - If you are using SSL, enter the fully-qualified domain name.
  - b. Click **Next**.
8. On the the **Discovery Web Server** page:

- a. In the **Discovery Application Server** field, enter the name of the Discovery dedicated server.
  - If you are not using SSL, enter the host name.
  - If you are using SSL, enter the fully-qualified domain name.
- b. Click **Finish**.

## Configuring the Deployment on the Ivanti Service Manager Operations Console

- "Configuring the Ivanti Service Manager Operations Console" below
- "Creating the Staging and UAT Instances of the Tenants" on page 127
- "Making Configuration Changes to Tenants" on page 128

Perform these steps from the Operations Console, which you installed in the staging/UAT environment.

---

This section only contains brief, high-level instructions.



For complete information about using the Operations Console, including how to log in, see the *Operations Console User Guide for Ivanti Service Manager*.

---

## Configuring the Ivanti Service Manager Operations Console

To log into the Operations Consoles, do the following:

1. In the **Start** menu, click the down arrow to see the **Apps** menu, and then click **HEAT Operations Console**.
2. Enter your user name and password and then click **Login**.



The default user name is admin and the default password is manage.

---

*Operations Console Log In Screen*



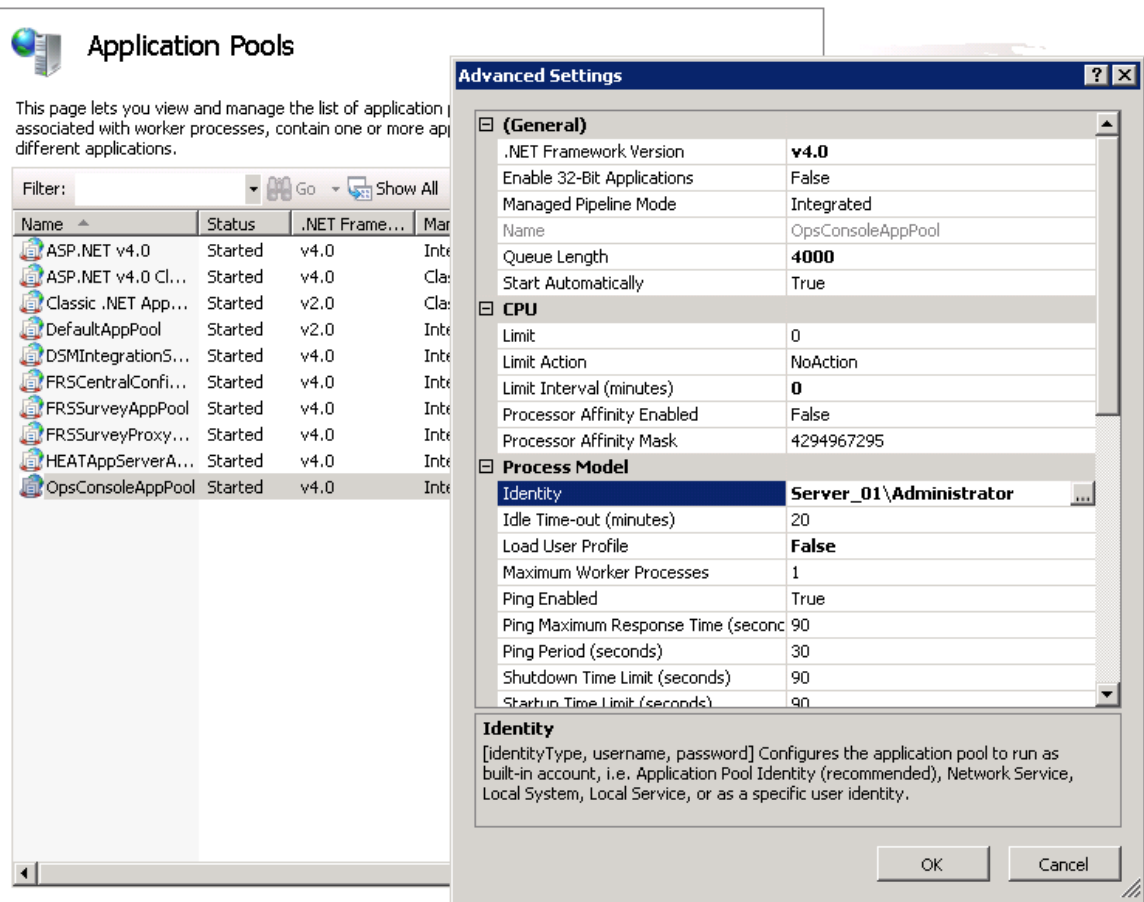
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3. Use the Operations Console to update the values for the Ivanti Service Manager application database by doing the following:
  - a. Click the **Landscape** tab.
  - b. Click **Database Server** on the left.
  - c. Click **Add Database Server**.
  - d. Enter a database login ID and password and set the data and backup locations. See the example values in "Adding a Database Server" below.

*Adding a Database Server*

- e. For the data and backup locations, change the application pool identity so that it has read access. See "Changing the Application Pool Identity" on the next page.

### Changing the Application Pool Identity



See the *Working with Database Servers* section of the *Operations Console User Guide for Ivanti Service Manager* for complete details about editing a database server.

4. Delete the Ivanti Service Manager application databases on the staging and UAT instances of the tenant, by doing the following:
  - a. Click the **Tenants** tab.
  - b. Click **Expanded View** to view all the details about the tenants.
  - c. Find the staging instance of the tenant and click **Deactivate**.
  - d. Click **Deactivate** at the confirmation prompt.
  - e. For the staging instance of the tenant, click **Delete**.
  - f. Check **Skip Backup** and click **Delete** at the confirmation prompt.
  - g. Repeat steps c. through f. for the UAT instance of the tenant.

You now have three instances of the configuration database and a production instance of the tenant.

See the *Editing a Tenant* section of the *Operations Console User Guide for Ivanti Service Manager* for complete details about deleting tenants and tenant instances.

## Creating the Staging and UAT Instances of the Tenants

To create the staging and UAT instances of the tenant, based on the production instance, do the following:

1. Log into the Operations Console.
2. Click the **Tenants** tab.
3. Navigate to the production instance of the tenant and click **Manage Migration**.
4. Create the staging instance of the tenant, by doing the following:
  - a. In the migration dashboard, click **Push** which is located inside the arrow going from the production instance of the tenant to the staging instance of the tenant. See "Creating a Staging Instance of the Tenant" below.

*Creating a Staging Instance of the Tenant*

The screenshot displays the HEAT Operations Console interface. At the top, it says "HEAT Operations Console" with the subtitle "Add, edit, and manage tenants in a landscape and across landscapes". The user is logged in as "admin". The navigation tabs include "Tenants", "Users", "System Status", "Landscape", and "Events & Audit History". The current view is "Migration Dashboard for tenant 'FRS-DEV-DEMO1'".

The main section is titled "Migration Configuration". A message states: "The package migration feature is not enabled. Contact HEAT Software USA Inc. before enabling it." with an "Enable" button.

Three instance boxes are shown:

- production** (blue box): Status: Active, Landscape: FRS-DEV (produ...), URL: frs-dev-demo1.sa..., Version: 0, Metadata Locked: no, Last update on: 3/12/2015, Last update by: FRS\_OA, Created on: 2/13/2015.
- staging** (orange box): Status: (blank), Landscape: (blank), URL: (blank), Version: (blank), Metadata Locked: no, Last update on: (blank), Last update by: (blank), Created on: (blank).
- uat** (green box): Status: (blank), Landscape: (blank), URL: (blank), Version: (blank), Metadata Locked: no, Last update on: (blank), Last update by: (blank), Created on: (blank).

Arrows labeled "Push" indicate migration paths: from production to staging, from production to uat, and from staging to uat.

Below the instances is a "Revision History" table with the following columns: Date (UTC), User, Action, Message, Database, Environment, and Company. The table currently shows "No Events Found".

The system displays the **Copy Production to Staging** dialog box.

- b. In the **Target DB Option** field, select **From live MSSQL backup**. See "Copy Production Instance of the Tenant to the Staging Instance of the Tenant" on the next page.

*Copy Production Instance of the Tenant to the Staging Instance of the Tenant*

- c. Click **Execute**.
5. Create the UAT instance of the tenant:
    - a. In the migration dashboard, click **Push** which is located inside the arrow going from the production instance of the tenant to the UAT instance of the tenant. See "Creating a Staging Instance of the Tenant" on the previous page. The system displays the **Copy Production to UAT** dialog box.
    - b. In the **Target DB Option** field, select **From live MSSQL backup**. See "Copy Production Instance of the Tenant to the Staging Instance of the Tenant" above.
    - c. Click **Execute**.

You can now customize Ivanti Service Manager and use the Operations Console to push those customizations to the other instances of the tenant.

## Making Configuration Changes to Tenants

1. Log into the Operations Console.
2. Click the **Tenants** tab.
3. Make configuration changes in the staging instance of the tenant.

4. Push the configuration changes that you made in the staging instance of the tenant to the UAT instance of the tenant by doing the following:
  - a. Click **Push** which is located inside the arrow going from the staging instance of the tenant to the UAT instance of the tenant. See "Creating a Staging Instance of the Tenant" on page 127. The system displays the **Copy Staging to UAT** dialog box.
  - b. You can use simple mode by leaving **Advanced Mode** unchecked, or you can use advanced mode by checking **Advanced Mode**. If you use advanced mode, select **Copy Configuration** in the **Operation** field and check your options. See "Copy Production Instance of the Tenant to the Staging Instance of the Tenant" on the previous page.
  - c. Click **Execute**.
5. Verify that the configuration changes that you made to the staging instance of the tenant (in step 3) were successfully migrated to the UAT instance of the tenant.
6. Make additional configuration changes in the staging instance of the tenant as needed.
7. After you have finished making configuration changes and have verified them, push the configuration changes from the UAT instance of the tenant to the production instance of the tenant.

## Optional SSL Configuration

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The Metrics Server is not compatible with SSL if your Ivanti Service Manager system has Windows authentication set up.

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- "About the SSL Configuration" below
- "Configuring SSL for the Configuration and Application Databases" on the next page
- "Configuring SSL for the Application Database Only" on page 135

## About the SSL Configuration

---



For all fields in the System Configuration Wizard that ask for a server location, when using SSL, you must enter a fully-qualified domain name (FQDN). This is because SSL needs a certificate and the certificate authority requires an FQDN.

---

You can configure Ivanti Service Manager for SSL. This configuration is optional. There are three scenarios:

- The Ivanti Service Manager application database and the configuration database both use SSL. See "Configuring SSL for the Configuration and Application Databases" on the next page.

- The Ivanti Service Manager application database uses SSL but the configuration database does not use SSL. See "Configuring SSL for the Application Database Only" on page 135.
- Neither the Ivanti Service Manager application database nor the configuration database uses SSL. In this scenario, do not check SSL on any of the pages of the System Configuration Wizard.

## Configuring SSL for the Configuration and Application Databases

To configure both your Ivanti Service Manager application database and the configuration database to use SSL, follow all of the steps in all of these sections:

- "Before You Begin" below
- "Configuring SSL in Microsoft IIS Manager" below
- "Configuring SSL in the System Configuration Wizard" on the next page

### Before You Begin

- Ensure that `https://localhost:443` displays the Microsoft IIS Manager welcome page.
- Ensure that your system has a valid certificate.

### Configuring SSL in Microsoft IIS Manager

1. In Microsoft IIS Manager, navigate to **Sites > Default Web Site** and select **SSL Settings**.
2. On the **SSL Settings** page, check **Require SSL** and under client certificates, select **Ignore**.
3. Navigate to **Sites > HEAT** and select **SSL Settings**.
4. On the **SSL Settings** page, check **Require SSL** and under client certificates, select **Ignore**.
5. Navigate to **Sites > CentralConfig** and select **SSL Settings**.
6. On the **SSL Settings** page, check **Require SSL** and under client certificates, select **Ignore**.
7. Navigate to **Sites > FRSSurveyProxy** and select **SSL Settings**.
8. On the **SSL Settings** page, check **Require SSL** and under client certificates, select **Ignore**.
9. Add an SSL port by doing the following:
  - a. Navigate to **Sites > Default Web Site**, right click, and select **Edit Bindings...**
  - b. Click **Add...**
  - c. In the **Add Site Binding** dialog box, for the **Type** field, select **HTTPS** and in the **SSL certificate** field, select the certificate that you received from the certificate authority. The system automatically enters 443 for the port.
  - d. In the **IP Address** field, enter a fully-qualified domain name.
  - e. Click **OK**.

10. Verify that you can access [https://fully\\_qualified\\_domain\\_name](https://fully_qualified_domain_name).

## Configuring SSL in the System Configuration Wizard

1. In the System Configuration Wizard, on the **Configuration Application** page, ensure that the value in the **Configuration Server Domain Name** field uses a fully-qualified domain name. Do not use a machine name.

*Configuration Application Page*

The screenshot shows the 'System Configuration Wizard' window. On the left is a navigation pane with seven steps: 1. Configuration Application (highlighted), 2. Service Manager Application, 3. Application Server Settings, 4. Other Feature Settings, 5. Metrics Server, 6. Discovery Application Server, and 7. Discovery Web Server. The main area is titled 'Configuration Application' and contains the following fields and controls:

- Configuration Database Name: ConfigDB
- Authentication:  Windows Authentication,  SQL Authentication
- User Name: administrator
- Password: [masked]
- Test Connection button
- Connection successful! (red text)
- Configuration Database details: Created On: 7/31/2017, Modified On: 7/31/2017, System Table Version: 657, Metadata Package Version: 2016.2.0
- Re-Create & Load Configuration DB button
- Configuration Server Domain Name: AZ-TP-WIN2012-1.ivanti.com (circled in red)
- License Server: AZ-TP-WIN2012-1, Port: 80,  Use SSL
- License File for Production: C:\Users\Administrator\Desktop\USA-Service, Browse... button
- Administrator Account for Ivanti Service Manager Configuration Application:
  - Login ID: HSWAdmin
  - Password: [masked]
  - Confirm Password: [masked]
  - First Name: HSW
  - Last Name: Admin
  - Email Address: HSWAdmin@ivanti.com
- Next>> button

2. On the bottom of the **Ivanti Service Manager Application** page, ensure that you check **Use domain name to access Application** and enter a fully-qualified domain name for the Ivanti Service Manager application server. Do not use a machine name.

*Ivanti Service Manager Application Page*

**System Configuration Wizard**

1. Configuration Application  
2. Service Manager Application  
3. Application Server Settings  
4. Other Feature Settings  
5. Metrics Server  
6. Discovery Application Server  
7. Discovery Web Server

**Application Database**  
Created On: 7/31/2017  
Modified On: 7/31/2017  
System Table Version: 657  
Metadata Package Version: 2016.2.0  
 Don't include Demo data.  
Load Application Database

Application Name: Ivanti Service Manager  
Attachment Type: Database  
Client Auth Key: 6b621ec9bad04106ae674698  
Import Remote Control License File:  Browse...

Use machine name to access application  
 Use domain name to access application  
Application server domain name: AZ-TP-WIN2012-1.ivanti.com

**Administrator Account for Ivanti Service Manager Application**

Login ID: HEATAdmin  
Password: ●●●●●●●●  
Confirm Password: ●●●●●●●●  
First Name: HEAT  
Last Name: Admin  
Email Address: HEATAdmin@ivanti.com

Advanced Options

<<Previous Next>>

3. On the **Application Server Settings** page, do the following:
  - Ensure that you enter the fully-qualified domain name in the **Configuration Server Location** field.
  - Check **Use SSL**.
  - Enter the fully-qualified domain name in the **Host Name** field.

*Application Server Settings Page.*



The screenshot shows the 'System Configuration Wizard' window. On the left is a navigation pane with seven steps: 1. Configuration Application, 2. Service Manager Application, 3. Application Server Settings (highlighted in yellow), 4. Other Feature Settings, 5. Metrics Server, 6. Discovery Application Server, and 7. Discovery Web Server. The main area is titled 'Application Server Settings' and contains the following fields and options:

- Configuration Server Location:  Port:   Use SSL
- Host Name:
- Host (AZ-TP-WIN2012-1) is not detected and will be added to Configuration Database.
- Use this host for Operations Console:
- Use this host for Survey:
- Use these settings for Reporting Service:

At the bottom of the wizard are two buttons: '<<Previous' and 'Next>>'. A red rectangle highlights the Configuration Server Location, Port, Use SSL, and Host Name fields.

4. On the **Other Feature Settings** page, for the Ivanti Service Manager application server, check **Use SSL**.

*Other Feature Settings Page*

**System Configuration Wizard**

1. Configuration Application  
2. Service Manager Application  
3. Application Server Settings  
**4. Other Feature Settings**  
5. Metrics Server  
6. Discovery Application Server  
7. Discovery Web Server

**Configuration Settings**

Log File Location: C:\Logs

Temp Folder Location: C:\Temp

Cache Location: C:\Cache

**Customize Server**

Application Server: AZ-TP-WIN2012-1.ivanti.com Port: 80  Use SSL

Message Queue Server: AZ-TP-WIN2012-1 Port: 7200  Use SSL

Integration Service Server: AZ-TP-WIN2012-1 Port: 80  Use SSL

Discovery Application Server: AZ-TP-WIN2012-1 Port: 8382  Use SSL

**Inbound Web Service Settings**

Inbound Web Service Server: AZ-TP-WIN2012-1 Port: 80  Use SSL

Trusted Host & Remote Host Blocked List:

Restart services after setting configuration files.

<<Previous 

5. On the **Metrics Server** page, check **Use SSL**.

*Metrics Server Page*

The screenshot shows the 'System Configuration Wizard' window. On the left is a navigation pane with seven steps: 1. Configuration Application, 2. Service Manager Application, 3. Application Server Settings, 4. Other Feature Settings, 5. Metrics Server (highlighted in yellow), 6. Discovery Application Server, and 7. Discovery Web Server. The main area displays the configuration for the Metrics Server. At the top, there is a 'Password' field with masked characters and a 'Test Connection' button. Below that, it states 'A Metrics Server Database is detected.' with 'Created On: 8/1/2017' and 'Modified On: 8/1/2017', and a 'Re-Create & Load Configuration DB' button. The 'Configuration Server Location' field is circled in red and contains 'ivanti.com'. Next to it is a 'Port' field with '443' and a checked 'Use SSL' checkbox, followed by another 'Test Connection' button. A message states: 'This server is not registered as a Metrics Server. Click Save to register it with Ivanti Service Manager.' Below this are fields for 'Name' (Metrics Server), 'Description', and 'Server Name' (AZ-TP-WIN2012-1). There are 'Use SSL' and 'Enabled' checkboxes, with 'Enabled' checked. A 'Save' button is present. At the bottom, there is a table to select applications for the Metrics Server:

| Application Name       | Metrics Server | Map                      |
|------------------------|----------------|--------------------------|
| Ivanti Service Manager |                | <input type="checkbox"/> |

Navigation buttons '<<Previous' and 'Next>>' are at the bottom of the wizard.

## Configuring SSL for the Application Database Only

To configure your Ivanti Service Manager application database to use SSL but not the configuration database, follow all of the steps in all three sections:

- "Before You Begin" below
- "Configuring SSL in Microsoft IIS Manager" below
- "Configuring SSL in the System Configuration Wizard" on the next page

### Before You Begin

- Ensure that `https://localhost:443` displays the Microsoft IIS Manager welcome page.
- Ensure that your system has a valid certificate.

### Configuring SSL in Microsoft IIS Manager

1. In Microsoft IIS Manager, navigate to **Sites > Default Web Site** and select **SSL Settings**
2. On the **SSL Settings** page, ensure that **Require SSL** is not checked. Under client certificates, select **Ignore**.

3. Navigate to **Sites > HEAT** and select **SSL Settings**.
4. On the **SSL Settings** page, check **Require SSL** and under client certificates, select **Ignore**.
5. Navigate to **Sites > CentralConfig** and select **SSL Settings**.
6. On the **SSL Settings** page, ensure that **Require SSL** is not checked. Under client certificates, select **Ignore**.
7. Navigate to **Sites > FRSSurveyProxy** and select **SSL Settings**.
8. On the **SSL Settings** page, check **Require SSL** and under client certificates, select **Ignore**.
9. Add an **SSL** port by doing the following:
  - a. Navigate to **Sites > Default Web Site**, right click, and select **Edit Bindings...**
  - b. Click **Add...**
  - c. In the **Add Site Binding** dialog box, for the **Type** field, select **HTTPS** and in the **SSL certificate** field, select the certificate that you received from the certificate authority. The system automatically enters 443 for the port.
  - d. In the SSL certificate field, enter a fully-qualified domain name.
  - e. Click **OK**.
10. Verify that you can access `https://local_host`.

### **Configuring SSL in the System Configuration Wizard**

1. In the System Configuration Wizard, on the **Ivanti Service Manager Application** page, ensure that the Ivanti Service Manager application database uses a fully-qualified domain name and not a machine name.

*Ivanti Service Manager Application Page*

The screenshot shows the 'System Configuration Wizard' window. On the left is a navigation pane with seven steps: 1. Configuration Application, 2. Service Manager Application (highlighted in yellow), 3. Application Server Settings, 4. Other Feature Settings, 5. Metrics Server, 6. Discovery Application Server, and 7. Discovery Web Server. The main area is titled 'Application Settings' and contains the following fields and options:

- Application Database Server: AZ-TP-WIN2012-1 (dropdown)
- Application Database Name: SM.Ivanti.com (text input, circled in red)
- Authentication:  Windows Authentication,  SQL Authentication
- User Name: administrator (text input)
- Password: [masked] (text input) with a 'Test Connection' button
- Application Database: Created On: 7/31/2017, Modified On: 8/1/2017, System Table Version: 657, Metadata Package Version: 2016.2.0. Includes a 'Load Application Database' button and a 'Don't include Demo data.' checkbox.
- Application Name: Ivanti Service Manager (text input)
- Attachment Type: Database (dropdown)
- Client Auth Key: 6b621ec9bad04106ae674698 (text input)
- Import Remote Control License File: [empty] (text input) with a 'Browse...' button
- Access:  Use machine name to access application,  Use domain name to access application
- Application server domain name: AZ-TP-WIN2012-1.Ivanti.com (text input)
- Administrator Account for Ivanti Service Manager Application (text input)

Navigation buttons: '<<Previous' and 'Next>>' are located at the bottom of the wizard.

2. On the **Application Server Settings** page, do the following:
  - Ensure that **Use SSL** is not checked.
  - Ensure that you enter the fully-qualified domain name in the **Configuration Server Location** field.
  - Ensure that you enter the host name, and not the fully-qualified domain name, in the **Host Name** field.

*Application Server Settings Page*

The screenshot shows the 'System Configuration Wizard' window. On the left is a navigation pane with seven steps: 1. Configuration Application, 2. Service Manager Application, 3. Application Server Settings (highlighted in yellow), 4. Other Feature Settings, 5. Metrics Server, 6. Discovery Application Server, and 7. Discovery Web Server. The main area is titled 'Application Server Settings'. It contains the following fields and options:

- Configuration Server Location:  Port:   Use SSL
- Host Name:
- Host (AZ-TP-WIN2012-1) is not detected and will be added to Configuration Database.
- Use this host for Operations Console:
- Use this host for Survey:
- Use these settings for Reporting Service:

At the bottom of the wizard are two buttons: '<<Previous' and 'Next>>'. A red rectangle highlights the 'Configuration Server Location', 'Port', 'Use SSL', and 'Host Name' fields.

3. On the **Other Feature Settings** page, check **Use SSL**.



This is the *only* place in the System Configuration Wizard where you check **Use SSL**. Do *not* check **Use SSL** on any other page.

*Other Feature Settings Page*

## Optional LDAP Configuration

Ivanti Service Manager supports LDAP. LDAP is configured from the Configuration Console.

After installation, go to the online help and view the topic called *Configuring LDAP Settings*.

## About Configuring with ADFS

Ivanti Service Manager supports ADFS. ADFS is configured from the Configuration Console.

After installing the system, go to the online help and view the topic called *Working with ADFS/SAML*.

## About Configuring Throttling Settings

- "About Throttling" on the next page
- "Checking the Throttling Status" on the next page
- "Configuring Outbound Throttling Settings" on the next page

## About Throttling

In Ivanti Service Manager, throttling is when the system intentionally slows the speed of web services. We use this process to regulate the network traffic and to minimize bandwidth congestion. When using web services, Ivanti Service Manager may limit the message rate, based on overall load. If you exceed the rate of 100,000 API calls per day, you may find your responses slowed to an appropriate rate. This helps ensure that you get a fair share of resources, and Ivanti Software can prevent unintended performance degradation from runaway integrations and denial of service attempts.

For more information about using the Ivanti Service Manager integration web services, go to the online help and view the topic called *Working with the Integration Web Service*.

## Checking the Throttling Status

### Configuring Outbound Throttling Settings

In on-premise implementations, your web service use only affects your environment. If you exceed the recommended rate, you may see performance implications. You can adjust your outbound throttling thresholds to maximize performance. The hardware capacity of your system also affects the values that you set these parameters to.

The following are the outbound throttling parameters:

| Parameter                           | Description   |
|-------------------------------------|---|
| ResetRuntimeCacheExpectedTimeout    | The amount of time, in ms, that the system allocates to reset the runtime cache operation. If it takes longer than this, the system moves the operation to the pending actions and marks the server as unhealthy. |
| ResetRuntimeCacheUnhealthyDelayTime | If the server is considered unhealthy, this is the amount of time, in ms, to delay things. After this amount of time has passed, the system executes the action.  |
| PendingActionCleanupPeriod          | How often, in ms, to clean up the pending actions that are stored in memory.  |
| PendingActionsThreshold             | The amount of memory, in bytes, used to store all of the pending actions. Whenever a pending action exceeds the timeout value, the system adds the action to the pending action collection in memory.             |
| ThrottlingEnable                    | Turns on or off outbound throttling.  |

Change the throttling parameters as follows:

1. Navigate to the AppServer folder and open the web.config file using a text editor such as Notepad.
2. Search for and find the following strings:



```
<!--Expected timeout on executing reset runtime cache action
during throttling (value in milliseconds)-->
<add key="ResetRuntimeCacheExpectedTimeout" value="1000" />

<!--Expected delaying on executing reset runtime cache before
executing action in during throttling (value in milliseconds)-->
<add key="ResetRuntimeCacheUnhealthyDelayTime" value="5000" />

<!--Expected period to clean up the pending actions (value
in milliseconds)-->
<add key="PendingActionCleanupPeriod" value="300000" />

<!--Expected size threshold of pending actions collection -->
<add key="PendingActionsThreshold" value="15728640" />

<add key="ThrottlingEnable" value="true" />
```

3. Change the values as needed.
4. Save the file.
5. Perform a Microsoft IIS reset.

# Logging into Ivanti Service Manager

- "Logging In Using the Standard Login Dialog Box" below
- "Logging In Using the Standard Login Dialog Box with an Application Menu" on the next page
- "Adding the Application Menu Option to the Standard Login Dialog Box" on the next page

## Logging In Using the Standard Login Dialog Box

The standard login dialog box enables you to access Ivanti Service Manager on the host that you are logged into now. You see this dialog box when you click the any of the following:

- The Ivanti Service Manager desktop shortcut
- The Windows apps menu shortcut

In the dialog box, enter your user name and password, and then click **Login**.

*Standard Login Dialog Box*

Ivanti. Copyright © 2005-2017 Ivanti. All rights reserved. [Privacy Policy](#) - [Legal Terms and Notices](#)'."/>

The screenshot shows the standard login dialog box for Ivanti Service Manager. It features a 'User name' field containing 'administrator', a 'Password' field with masked characters and a visibility icon, a red 'Login' button, and a 'Forgot Password?' link. To the right of the dialog box is the Ivanti logo and the text 'Ivanti Service Manager'. Below the logo, there is a small text block: 'To learn more about our innovative IT Service Management solutions, visit our website at [Ivanti](#). Copyright © 2005-2017 Ivanti. All rights reserved. [Privacy Policy](#) - [Legal Terms and Notices](#)'.



The default user name for Ivanti Service Manager is HEATAdmin. You created the password when you configured the application database. See "Configuring the Ivanti Service Manager Application" on page 83.

## Logging In Using the Standard Login Dialog Box with an Application Menu

This login dialog box enables you to access the following:

- The Ivanti Service Manager system on the host that you are logged into now.
- Individual tenants, such as staging or UAT, if you have more than one.
- The configuration database (ConfigDB).

In the dialog box, enter your user name and password, select an application, and click **Login**.



The default user name for the configuration database (ConfigDB) is HSWAdmin. You chose the password when you created the database. See "Configuring the Configuration Database" on page 77.

The default user name for Ivanti Service Manager is HEATAdmin. You chose the password when you created the application database. See "Configuring the Ivanti Service Manager Application" on page 83.

---

## Adding the Application Menu Option to the Standard Login Dialog Box

To see the login dialog box with the application menu option (only for server-side login), do the following:

1. Go to C:\Program Files\HEAT Software\HEAT\AppServer\.
2. Right-click the HEAT.url file, and choose **Properties**.
3. Change the host name and port number to **localhost**. For example, change http://SERVER2012:80/HEAT to http://localhost/HEAT.
4. Click **OK**.
5. Open a directory window or a browser window and enter either **localhost/HEAT** or **http://localhost/HEAT**.

# Adding Features and Changing Settings

- "Adding and Deleting Features" below
- "Changing Feature Settings by Running the System Configuration Wizard" on the next page

## Adding and Deleting Features

Adding features to or deleting features from an existing Ivanti Service Manager system is much easier than upgrading the system.

If you have an "Enterprise Production Deployment" on page 11, your action might apply to just one, some, or all of the servers, depending on the features that you are adding or deleting.



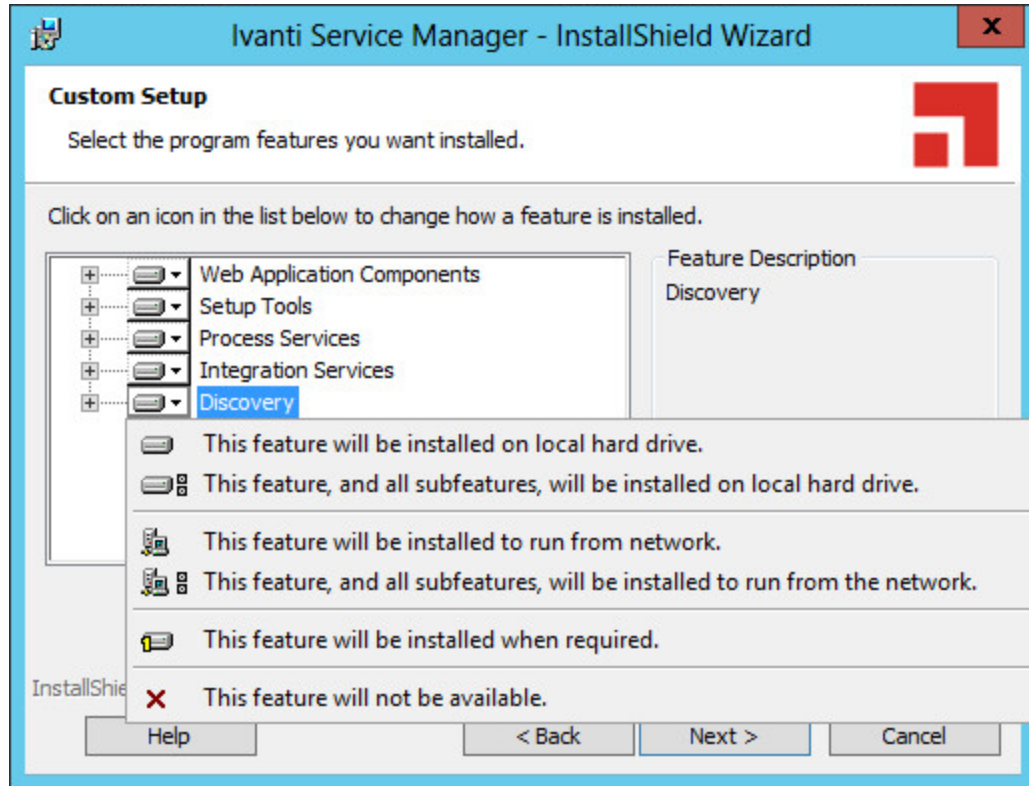
To add servers to your deployment, follow the instructions under "Installing the Ivanti Service Manager System" on page 57

---

To add features or delete features, do the following:

1. Access the installation folder on the Ivanti Software product CD or zip file and run IvantiServiceManager.exe. Right-click and select **Run as Administrator** to ensure proper installation.  
  
The installer checks for the prerequisite software components. If any of those components is not installed, the system prompts you to install them now.
2. Select **Install** at the prompt. Installation of the prerequisite software can take several minutes.
3. If you are prompted to restart the system, select **Yes**. The system displays the **Welcome** dialog box.
4. Click **Next**. The system displays the **Program Maintenance** dialog box.
5. Choose **Modify** and click **Next**. The system displays the **Custom Setup** dialog box.

*Custom Setup Dialog Box*



6. Click the down arrow on each feature and make your selection.



Adding features requires more hard-drive space. If there is not enough space on your hard drive, the installer displays a message.

7. Click **Next** and then click **Install**.

The Ivanti Service Manager installation begins. The system displays a status dialog box showing the installation progress of each component over the next few minutes.

8. If you cancel the installation at any time, click **Finish** to close the installer.

When the components are installed, the system automatically launches the System Configuration Wizard.

9. Go to "Configuring Ivanti Service Manager " on page 76 for instructions about using the System Configuration Wizard.

## Changing Feature Settings by Running the System Configuration Wizard

To change settings without adding or deleting features, you do not need the Ivanti Software product CD or zip file.

1. In the **Start** menu, click the down arrow to see the **Apps** menu, and then click **System Configuration Wizard**.



You must click **Run as administrator** when you start the System Configuration Wizard manually.

---

2. Go to "Configuring Ivanti Service Manager " on page 76 for instructions about using the System Configuration Wizard.

# Upgrading Ivanti Service Manager from an Earlier Release

- "About Upgrading" below
- "About Upgrading from Earlier Releases" on the next page
- "Upgrading from HEAT Service Management Release 2017.3.x" on page 149
- "Upgrading from HEAT Service Management Release 2014.3 or Earlier" on page 152

## About Upgrading

- "About Upgrading Landscapes" below
- "About Upgrading the Reporting Feature" below
- "About Upgrading Your Licenses" below
- "About Upgrading the DSM Integration" on the next page

## About Upgrading Landscapes

During a Ivanti Service Manager upgrade, you can upgrade the development (staging) or testing (UAT) landscapes and test them without affecting the production landscape. After you have verified that the development (staging) or testing (UAT) landscape upgrade was successful, go ahead with production landscape upgrade.

## About Upgrading the Reporting Feature

You must upgrade both Ivanti Service Manager and the reporting feature at the same time. The versions of the software for both Ivanti Service Manager and the reporting feature must be the same.

## About Upgrading Your Licenses

Versions of HEAT Service Management before Release 2015.1 used a different licensing structure. When you upgrade to Ivanti Service Manager Release 2018.3, the system automatically uses the licenses that you used in the previous release.

In the System Configuration Wizard, on the **Configuration Application** page, there are fields to enter the license files. The system populates these fields automatically based on your previous license file. See "Configuring the Configuration Database" on page 77.

## About Upgrading the DSM Integration

If your Ivanti Service Manager deployment includes a DSM integration, you must configure and verify your DSM integration for the new release.



Although there is a DSM integration service component in the Ivanti Service Manager installer, it is only used for DSM integrations prior to HEAT Service Management Release 2015.2.

For DSM integrations after HEAT Service Management Release 2015.2, you must use the package from the Ivanti App Store.

After you have upgraded Ivanti Service Manager, access the Ivanti Software App Store and the DSM integration by doing the following:

1. Log into <https://support.heatsoftware.com/>.
2. Go to the Ivanti Software App Store by selecting **App Store** from the top menu.
3. From within the Ivanti Software App Store, open the DSM integration package.
4. Download the DSM integration package for Release 2018.1.1 and the accompanying instructions.
5. Follow the instructions to configure and verify your DSM integration.

For more information about DSM, see *Working with DSM* in the online help and the *DSM HEAT Integration – HEAT Desktop and Server Management Booklet*.

## About Upgrading from Earlier Releases

To upgrade to Ivanti Service Manager Release 2018.3, you must upgrade your system to every HEAT Service Management release between your currently installed release and Ivanti Service Manager Release 2018.3 in sequential order. See the table below.

| Upgrade From Release | Uninstall  | Install Release |
|----------------------|--|-----------------|
| 2013.1.x             | The current HEAT Service Management version and the Inventory Management component, if present. See "Uninstalling the Inventory Management Component" on page 152. | 2013.2.2        |
| 2013.2.x             |  | 2014.1.1        |
| 2014.1.x             |  | 2014.2.1        |
| 2014.2.x             |  | 2014.3.1        |
| 2014.3.x             |  | 2015.1          |
|                      |  |                 |



| Upgrade From Release | Uninstall | Install Release |
|----------------------|-----------|-----------------|
| 2015.1.x             | Nothing.  | 2015.2          |
| 2015.2.x             |           | 2016.1          |
| 2016.1.x             |           | 2016.2          |
| 2016.2.x             |           | 2017.2          |
| 2017.2.x             |           | 2017.3.x        |
| 2017.3.x             |           | 2018.1.x        |
| 2018.1.x             |           | 2018.3.x        |

For example, if you are currently on HEAT Service Management Release 2014.1.x and you want to upgrade to HEAT Service Management Release 2018.1.1, you must do the following:

1. Uninstall HEAT Service Management Release 2014.1.x and the Inventory Management component, if present. See "Uninstalling the Inventory Management Component" on page 152.
2. Install HEAT Service Management Release 2014.2.x.
3. Uninstall HEAT Service Management Release 2014.2.x.
4. Install HEAT Service Management Release 2014.3.x.
5. Uninstall HEAT Service Management Release 2014.3.x.
6. Install HEAT Service Management Release 2015.1.x.
7. Install HEAT Service Management Release 2015.2.x.
8. Install HEAT Service Management Release 2016.1.x.
9. Install HEAT Service Management Release 2016.2.x.
10. Install Ivanti Service Manager Release 2017.3.1
11. Install Ivanti Service Manager Release 2018.3

## Upgrading from HEAT Service Management Release 2017.3.x

If you are upgrading to Ivanti Service Manager 2018.3, you can just install it over HEAT Service Management Release 2017.3.x. You do not have to uninstall HEAT Service Management Release 2017.3.x.

If you have a multiple server environment, you must shut off the notifications to the web servers before you upgrade the system. This is because when you make metadata changes as part of the upgrade, the system tries to synchronize them, but because the versions are different, the system hangs or takes a lot of time. See step 2 below.

Perform these steps on the system that hosts the HEAT Service Management components:

1. Back up the following items:
  - HEAT Service Management Configuration Database (ConfigDB)
  - HEAT Service Management Application Database (HEATSM)
  - Attachment folder (if used)
2. (Optional, if your system uses multiple servers) Deactivate the web servers by doing the following:
  - a. Log into the Configuration Database. See the *Configuration Database Guide for Ivanti Service Manager* for information about using the configuration database.
  - b. Open the **Web Servers** workspace. The system displays a list of web servers.
  - c. Open a web server record.
  - d. Uncheck **Server is Active**.
  - e. Click **Save**.
  - f. Repeat for all of the web servers.
3. Access the installation folder on the Ivanti product CD or zip file and run IvantiServiceManager.exe. Right-click and select **Run as Administrator** to ensure proper installation.

The installer checks for the prerequisite software components. If any of those components is not installed, the system prompts you to install them now.
4. Click **Install** at the prompt. Installation of the prerequisite software can take several minutes. If you are prompted to restart the system, click **Yes**.
5. In the **Upgrade Confirmation** dialog box, click **Yes**. The system displays the **Welcome** dialog box. The installer checks for space and other requirements before displaying the **Next** button.
6. In the **Welcome** dialog box, click **Next**. The system displays the **License Agreement** dialog box.
7. Choose **I accept the terms in the license agreement** and click **Next**. The system displays the **Destination Folder** dialog box.
8. Click **Next** to accept the default installation folder, or click **Change** and select a different folder. The system displays the **Setup Type** dialog box.
9. Your selection of features from the **Setup Type** dialog box depends on the role of the individual host in your deployment plan.
  - For the "Demonstration or Proof-of-Concept Deployment" on page 7, choose **Complete**, click **Next**, and install all components.
  - For the "Minimum Production Deployment " on page 9, choose **Complete**, click **Next**, and install all components.

- For the "Enterprise Production Deployment" on page 11, your choice depends on the role of the host:
  - **Production processing server:** Choose **Custom**, click **Next**, and install all components except for the Operations Console.
  - **Staging or UAT processing servers:** Choose **Complete**, click **Next**, and install all components.
  - **Web servers:** Choose **Custom**, click **Next**, and only install the Ivanti Service Manager application server.

For the "Enterprise Production Deployment" on page 11, note the following:

- If your deployment includes different processing servers for production, staging, and UAT, you must install the License Manager in every one of those landscapes.
- You can choose **Complete** and install all Ivanti Service Manager features on all of your servers, but doing that takes up more disk space than necessary.

When installing components, note the following:

- To not install a component, click the down arrow next to the server icon next to the category name, highlight the component, right click, and select **This feature will not be available**.
- If your deployment includes DSM, you do not need to install the DSM integration service because that component has been incorporated into HEAT Service Management since Release 2015.2.

10. Click **Next**. The system displays the **Ready to Install the Program** dialog box.
11. Click **Install**. The system begins installing Ivanti Service Manager and displays a status dialog box, showing the installation progress of each module over the next few minutes.
12. Click **OK** if the system displays a dialog box saying that reboot is required after installation.
13. If the system displays a dialog box saying that some of the files that need to be updated are currently in use, choose **Automatically close and attempt to restart applications** and click **OK**.

When the installation is completed, the system displays the System Configuration Wizard.

14. Go through the pages in the wizard making any changes that might be necessary.



If you already have an existing administrator account, you do not need to create a new account. Just enter the information for your existing administrator account.

---

15. Notice that the system table version and metadata package version for the configuration database are not the latest versions.

16. Click **Finish**.
17. Restart the host server.
18. (Optional) If you also installed the Ivanti Service Manager reporting feature, you must upgrade it to match the release number of your Ivanti Service Manager system. Access the installation folder on the Ivanti Software product CD or download folder and run ReportingService.exe to upgrade Ivanti Service Manager reporting feature.
19. Log in to the configuration database and activate the web servers that you deactivated in step 2.

## Upgrading from HEAT Service Management Release 2014.3 or Earlier

- "About Upgrading From HEAT Service Management Release 2014.3 or Earlier" below
- "Uninstalling the Inventory Management Component" below

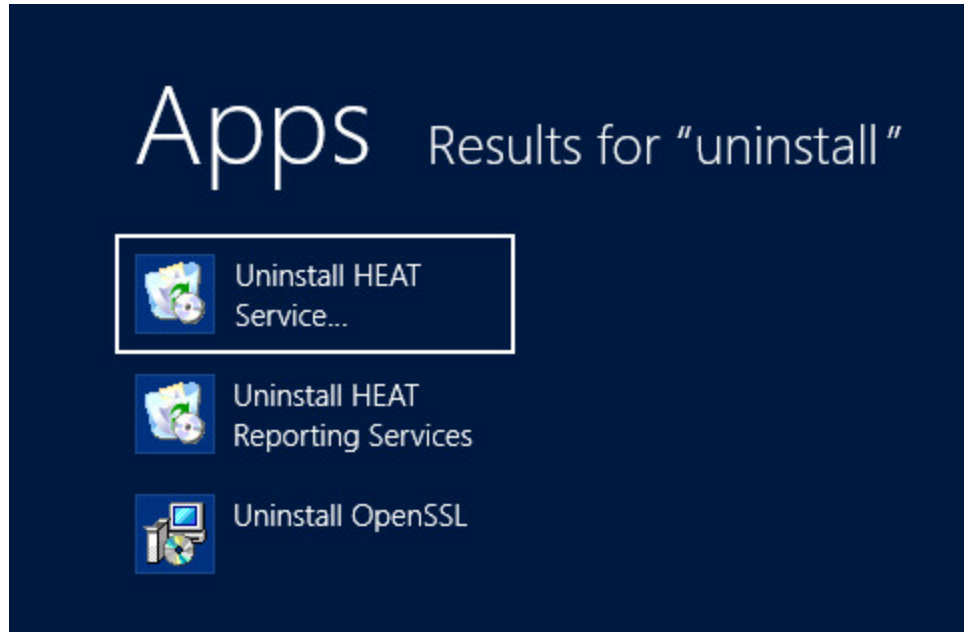
## About Upgrading From HEAT Service Management Release 2014.3 or Earlier

Beginning with HEAT Service Management Release 2015.1, the Inventory Management component is known as HEAT Discovery. As a result, before you can upgrade to the current version of Ivanti Service Manager, if you are upgrading from Release 2014.3 or earlier, you must first uninstall the Inventory Management component.

## Uninstalling the Inventory Management Component

Perform these steps on the system that hosts Ivanti Service Manager:

1. Click the arrow at the bottom of the **Start** menu to view the **Apps** menu.
2. Mouse-over the **Uninstall HEAT Service Management** icons to find the one for the Inventory Management component.



3. Click **Uninstall HEAT Service Management**.
4. In the confirmation dialog box, click **Yes**.

# Using the License Manager

- "About the License Manager" below
- "Types of Licenses" below
- "About License Bundles" on the next page
- "Using the License Manager" on page 157

## About the License Manager

Use the License Manager to track your license usage.

For the "Demonstration or Proof-of-Concept Deployment" on page 7 and "Minimum Production Deployment " on page 9, the License Manager is installed on the Ivanti Service Manager server along with the other Ivanti Service Manager components.

For the "Enterprise Production Deployment" on page 11, the License Manager is installed on the Ivanti Service Manager processing servers along with the other Ivanti Service Manager components.

During installation, the System Configuration Wizard enabled you to import one production license, one non-production license, or both, depending on your landscape environment. You can import additional licenses, if needed. See "Importing Licenses" on page 159.

## Types of Licenses

Ivanti Service Manager mainly uses production and non-production licenses:

| License Type   | Description  | Expiration   |
|----------------|--|--|
| Production     | Used to access the production landscape of a tenant.   | Does not expire unless the MAC address is unspecified. In that instance, the license expires after 30 days. If you move the license to a new server with a different MAC address, then you must acquire a new license tied to the new MAC address. |
| Development    | A non-production license used to access the staging and UAT landscapes.  | Expires according to the maintenance agreement between your organization and Ivanti Service Manager.   |
| Not For Resale | A non-production license, mainly used by Ivanti Service Manager partners. It can also be used for staging, UAT, or testing if you already have development licenses. | Expires after 30 days if you do not specify the MAC address. After you set the MAC address, it expires according to the maintenance agreement between your organization and Ivanti Service Manager.  |
| Evaluation     | A non-production license used by potential customers. Has the  | Expires after 30 days. Is not associated with a MAC address.   |

| License Type | Description   | Expiration |
|--------------|---|------------|
|              | maximum number of named and concurrent user licenses. |            |

There are two types of user licenses, for both production and non-production licenses:

- **Concurrent licenses:** For any user who is currently logged into the system. This is a shared pool of licenses. The concurrent license that is used is specified by the bundle that is specified for each role.
- **Named user licenses:** Specific to a certain user. The user can log in to the system from many places at one time and it is counted as only one license. You specify which users are named users in the employee record, and you can change which employees get a named user license at any time.

## About License Bundles

- "List of License Bundles and Components" below
- "Assigning a Bundled License to a Role" on the next page
- "License Tracking in Ivanti Service Manager" on page 157

Ivanti Service Manager has defined several license bundles, which are sets of modules, or user interfaces. Each role is associated with a license bundle.

## List of License Bundles and Components

| License Bundle | Components  |
|----------------|---|
| HelpDesk       | Knowledge<br>Incident<br>Problem<br>Self Service<br>Service Catalog                         |
| ServiceDesk    | Knowledge<br>Availability<br>Change<br>Configuration<br>Incident<br>Problem<br>Self Service |

| License Bundle    | Components  |
|-------------------|---|
|                   | Service Catalog   |
| ServiceManagement | Knowledge<br>Availability<br>Change<br>Configuration<br>Incident<br>Problem<br>Release<br>Service Level Management<br>Self Service<br>Service Catalog |
| ServiceCatalog    | Self Service<br>Service Catalog<br>Incident<br>Knowledge  |
| SelfService       | Self Service<br>Service Catalog<br>Incident<br>Knowledge  |

The following are considered license add-on modules:

| Add-on Module | Components |
|---------------|------------|
| Discovery     | Discovery  |
| Voice         | Voice      |
| Mobile        | Mobile     |

## Assigning a Bundled License to a Role

To assign a bundled license to a role, follow the procedure in the "Assigning a Bundled License to a Role" topic in the Ivanti Service Manager online help. By default, roles do not have a license bundle associated with them, so you must assign a license bundle to each role manually. If you do not, you may get license violation errors logged in your system even though you have the correct licenses.



If you have imported licenses but do not see the correct license bundles displayed in the



Configuration Console, clear the validation cache.



Go to **Configure > Cache Management** and then click **Reset cached validation lists only**.

See the Ivanti Service Manager online help for more information.

---

## License Tracking in Ivanti Service Manager

You cannot use Ivanti Service Manager unless you have a license. When you purchased Ivanti Service Manager, you also purchased a set number of licenses. If needed, you can purchase additional licenses.

If you consume more seats than you have licenses for, the system does not log you out. It does, however, log an event into a log file. For example, if you have 10 concurrent licenses and try to log in 11 times, the system allows it.

Due to the way that web browsers work, it is very possible for one user to consume more than one license. For example, if a user logs in to Ivanti Service Manager using Microsoft Internet Explorer and then opens Google Chrome and logs in again, another license is consumed. If this happens, the system logs a license violation error that you can view in the License Manager in the **System Audit Information** workspace.

## Using the License Manager

- "Logging Into the License Manager" below
- "Configuring Landscape Information" on the next page
- "Importing Licenses" on page 159
- "Viewing the Discovery Node Count" on page 161
- "Viewing the Active Licenses" on page 162
- "Configuring the Email Address for Notifications" on page 162
- "Configuring the SMTP Settings" on page 163
- "Working with Scheduled Jobs" on page 164
- "Viewing Reports" on page 166

## Logging Into the License Manager

The License Manager uses the same credentials that are used to access the configuration database.

To log into the License Manager, follow these steps:

1. In the **Start** menu, click the down arrow to see the **Apps** menu, and then click **License Server**.

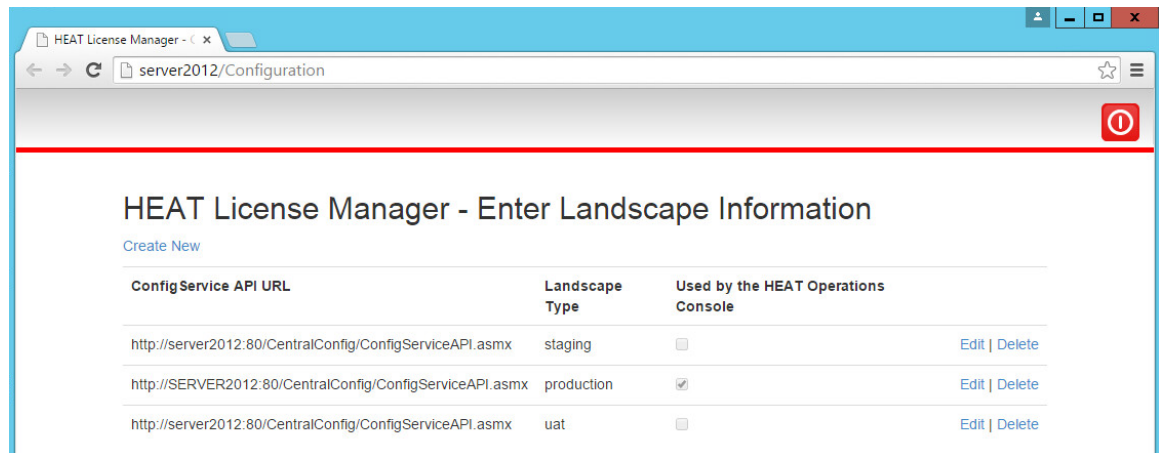
2. Select a landscape.
3. Enter your user ID and password. This is the same user ID and password that you use for the configuration database.
4. Click **Continue**.

## Configuring Landscape Information

You can create, edit, and delete information about the landscapes to which the License Manager is associated.

1. Log into the License Manager.
2. Click either **Configure Landscapes** in the top right corner of the login page or click **Configure Landscape Information** from any page in the License Manager. The system opens a new browser window and displays the **Enter Landscape Information** page.

*Enter Landscape Information Page*



3. To allow the Operations Console to use this landscape, check **Used by the Operations Console** on the line associated with the landscape.

The Operations Console can only use one landscape at a time.

4. To edit the information for an existing landscape, do the following:
  - a. Click **Edit** on the line associated with the landscape. The system displays the **Edit Landscape** page.
  - b. Make changes as needed.
  - c. Click **Save**.
5. To delete the landscape information, do the following:
  - a. Click **Delete** on the line associated with the landscape.
  - b. Click **Delete** at the confirmation message.

6. When you configured Ivanti Service Manager using the System Configuration Wizard, the system automatically created a link to the landscape.

Therefore, in general, you do not need to add a link to a landscape. However, if you do need to add a new link to a landscape, follow these steps:

- a. Click **Create New**. The system displays the **Create Landscape** page.
- b. In the **ConfigService API URL** field, enter the URL of the configuration server.
- c. Check **Used by the Operations Console** if the system should use this link to connect with the Operations Console. The Operations Console can only connect to one landscape.
- d. Click **Load Landscape Types** and then select a landscape from the drop-down list.
- e. Click **Create**.

## Importing Licenses

When you initially configured the License Manager in the System Configuration Wizard, you imported either one production license file, one non-production license file, or both. (See "Configuring Ivanti Service Manager " on page 76.)

If your deployment has multiple License Managers, when you import a license, ensure that you are importing it on the server that has the same MAC address as the license file.

For example, say you installed License Managers on the following:


- Application Server 1 with a MAC address of AA:10:23:10:00
- Application Server 2 with a MAC address of BB:10:23:10:00

Then you ask for and receive a production license for MAC address AA:10:23:10:00. You import the license from the License Manager that is installed on Application Server 1. After you have imported the license, the License Managers on both Ivanti Service Manager application servers respect the license. You do not need a second license for the second Application Server.

To import additional license files, follow these steps:

1. Log into the License Manager.
2. Click **Licensing > Import License Files**. The system displays the **Licensing - Import License Files** page.

*Import License Files Page*

 Refresh

**Import License File**

**List of imported license files**

| File Name   | Expiration Date         | MAC Address | Help Desk  |       | Cc |
|---|-------------------------|-------------|------------|-------|----|
|   |                         |             | Concurrent | Named |    |
| USA-ServiceManagement-TC54-42651-54-UNSPECIFIED-732e0ad7... | 12/31/2025, 12:00:00 AM | UNSPECIFIED | 10         | 7     | 7  |
| Total   |                         |             | 10         | 7     | 7  |


**License distribution per tenant**

| Tenant                  | Help Desk  |       |            |
|-------------------------|------------|-------|------------|
|                         | Concurrent | Named | Concurrent |
| HEAT Service Management | 10         | 7     | 7          |
|                         | 0          | 0     | 0          |

3. Click **Upload License File...**
4. Navigate to and select a license file and click **Open**.

The system adds the license to the system. This page shows the following information:

| Field              | Description  |
|--------------------|--|
| File Name          | The name of the license file that you uploaded.  |
| Expiration Date    | The expiration date of the license file.   |
| MAC Address        | The MAC address associated with the license file.  |
| Self Service       | Self Service is the bundle name. The number of Self Service licenses contained in the license file. Broken into concurrent and named licenses.             |
| Service Catalog    | Service Catalog is the bundle name. The number of Service Catalog licenses contained in the license file. Broken into concurrent and named licenses.       |
| Service Management | Service Management is the bundle name. The number of Service Management licenses contained in the license file. Broken into concurrent and named licenses. |

5. Click the **delete** icon to remove the license file and its associated licenses from the License Manager.
6. Click the **show details** icon  to display the details. The details contain the following information:

| Field               | Description  |
|---------------------|--|
| Bundle              | The name of the bundle.  |
| Name                | The name of the module.  |
| Named Licenses      | The number of named licenses contained in the license file.      |
| Concurrent Licenses | The number of concurrent licenses contained in the license file. |
| Expiration Date     | The date when the license expires.                               |

If your deployment only has one tenant, the information displayed here is the same as in the **List of imported license files** section.

If your deployment has more than one tenant, this table displays the license distribution across the tenants.

| Field              | Description  |
|--------------------|--|
| Tenant             | The name of the tenant.  |
| Self Service       | The number of Self Service licenses allocated per tenant. Broken into concurrent and named licenses.       |
| Service Catalog    | The number of Service Catalog licenses allocated per tenant. Broken into concurrent and named licenses.    |
| Service Management | The number of Service Management licenses allocated per tenant. Broken into concurrent and named licenses. |

- To distribute licenses among multiple tenants, click in a cell and change the number of licenses to allocate to a tenant. The total number of licenses across the tenants cannot exceed the total number of licenses. See "Allocating Licenses Across Tenants" below.

#### Allocating Licenses Across Tenants

##### License distribution per tenant

|  | Help Desk  |       | Service Desk |       | Service Management |       |
|--|------------|-------|--------------|-------|--------------------|-------|
|  | Concurrent | Named | Concurrent   | Named | Concurrent         | Named |
|  | 10         | 7     | 7            | 0     | 3                  | 3     |
|  | 0          | 0     | 0            | 0     | 0                  | 0     |

## Viewing the Discovery Node Count

This information tracks the trend associated with the Discovery licenses and is based on the Discovery **Count** scheduled job.

- Log in to the License Manager.
- Click **Licensing > Discovery**. The system displays the **Licensing - Discovery** page.

This page shows the following information:

| Field          | Description   |
|----------------|---|
| Tenant Name    | The name of the tenant.                                 |
| Last Scan Date | The date and time when the job was run.                 |
| Nodes Count    | The number of configuration items found during the job. |

## Viewing the Active Licenses

This page displays the active sessions on Ivanti Service Manager. It does not show active sessions on the configuration database.

1. Log in to the License Manager.
2. Click **Licensing > Active Licenses**. The system displays the **Licensing - Active Licenses** page.

*Active Licenses Page*

| Refresh                          |                         |       |             |                |                        |              |
|----------------------------------|-------------------------|-------|-------------|----------------|------------------------|--------------|
| Select Tenant:                   | HEAT Service Management |       |             |                |                        |              |
| Session ID                       | User                    | Role  | Bundle Name | Add-On Modules | License Taken Time     | License Type |
| 541ED76B4DA54FE0860CFD438997E463 | HEATAdmin               | Admin |             |                | 10/9/2015, 10:40:51 AM | Concurrent   |
| 7A33BE700879437BB9EE6F805388B16C | HEATAdmin               | Admin |             |                | 10/9/2015, 10:21:29 AM | Concurrent   |

3. Select a tenant from the drop-down list. This page shows the following information:



| Field              | Description   |
|--------------------|---|
| Session ID         | The session ID associated with the logged-in user.  |
| User               | The user name of a logged-in user.  |
| Role               | The role with which the user is logged in.  |
| Bundle Name        | The bundle associated with the license associated with the user. See "About License Bundles" on page 155. |
| Add-On Modules     | Any add-on modules associated with the bundle. See "About License Bundles" on page 155.                   |
| License Taken Time | The time when the system used the license.  |
| License Type       | The license type. Can be named or concurrent.   |

## Configuring the Email Address for Notifications

1. Log in to the License Manager.

2. Click **Configuration > Email Address**. The system displays the **Configuration - Email Address** page.

*Email Address Page*

 Refresh
 Save

**Provide Email Addresses for Email Notifications**

Email address to use when sending emails FROM the HEAT License Server: \*

Email address to use when sending emails TO the system administrator: \*

Email address to use when sending emails TO HEAT Software: \*

3. Enter the following information:

| Field  | Description   |
|--|---|
| Email address to use when sending emails from the License Server     | The email address to use as the FROM email address for emails sent from the License Manager.  |
| Email address to use when sending emails to Ivanti Software          | The email address to use as the TO email address for emails sent from the License Manager to Ivanti Software. The system sends license usage information based on the <b>License Violation Notification to Frs</b> scheduled job.                                 |
| Email address to use when sending emails to the system administrator | The email address to use as the TO email address for emails sent from the License Manager to the system administrator of your organization. The system sends license usage information based on the <b>License Violation Notification to Admin</b> scheduled job. |



4. Click **Save**.

## Configuring the SMTP Settings

Use this page to view and edit the SMTP settings used to send emails. The information on this page comes from the System Configuration Wizard.

1. Log into the License Manager.
2. Click **Configuration > SMTP Setting**. The system displays the **Configuration - SMTP Setting** page.

*SMTP Setting Page*

 Refresh
  Save

Select a tenant to see the SMTP settings that the tenant uses to send emails. These settings are from the Configuration Database.

Tenant:

Use this setting for Email Notifications:

Host: barracuda.datamasters.com

Port: 25

Account: admin@datamasters.com

Domain: ms2.datamasters.com

Use SSL: Yes

The system displays the following information:

| Field   | Description  |
|---------|--|
| Host    | The email server host.   |
| Port    | The port associated with the email server.   |
| Account | The account associated with this tenant. This is the same as the value in the <b>Username</b> field on the <b>Email Configuration</b> workspace in the Service Desk Console. |
| Domain  | The domain associated with the account.  |
| Use SSL | Specifies if this account should use SSL.  |

3. Select a tenant from the **Tenant** drop-down list.
4. Check **Use this setting for Email Notifications** to use these SMTP settings for emails.
5. Click **Save**.

## Working with Scheduled Jobs

The License Manager has several predefined scheduled jobs. These are used to send information to the administrator on a regular basis instead of sending an email every single time there is an event. All violations are listed on the **System Audit Information** page.

The following are the predefined scheduled jobs that cannot be changed:

- **License Capacity Allocation Notification Job:** Determines if your licenses are valid and that you actually have the licenses that you are allocating.
- **Named License Violation:** Determines if you have more users listed as named users than you have named user licenses.
- **Data Integrity Verification:** Determines if the licenses have been modified.





- **Discovery Count:** Determines if the licenses for your configuration items are valid.

The following are the predefined scheduled jobs that you can edit:

- **License Violation Notification to FRS:** Sends an email to Ivanti Software with information about license violations. By default, this job is disabled.
- **License Violation Notification to Admin:** Sends an email to your system administrator with information about license violations.

1. Log in to the License Manager.
2. Click **System Jobs**. The system displays the **System Jobs - Scheduled Jobs** page.

*Scheduled Jobs Page*

| Refresh  |  |                                     |            |            |                     |             |          |   |
|--|--|-------------------------------------|------------|------------|---------------------|-------------|----------|---|
| Dates and times are displayed in Server Time: (UTC-08:00) Pacific Time (US & Canada) |  |                                     |            |            |                     |             |          |   |
| Module   | Job  | Enabled                             | Start Date | Start Time | Next Run Date Time  | Recur Every | Interval |   |
| LicenseCore  | Set Data Integrity References                | <input checked="" type="checkbox"/> | 8/26/2015  | 12:00 AM   | 10/9/2015 12:50 PM  | Minute      | 10       |   |
| LicenseCore  | License Violation Notification To Hsw        | <input type="checkbox"/>            | 8/26/2015  | 12:00 AM   |                     | Day         | 1        |  |
| HeatModule   | Discovery Count                              | <input checked="" type="checkbox"/> | 8/26/2015  | 12:00 AM   | 10/10/2015 12:00 AM | Day         | 1        |   |
| HeatModule   | License Capacity Allocation Notification Job | <input checked="" type="checkbox"/> | 8/26/2015  | 12:00 AM   | 10/10/2015 12:00 AM | Day         | 1        |   |
| HeatModule   | Named License Violation                      | <input checked="" type="checkbox"/> | 8/26/2015  | 12:00 AM   | 10/10/2015 12:00 AM | Day         | 1        |   |
| LicenseCore  | Data Integrity Verification                  | <input checked="" type="checkbox"/> | 8/26/2015  | 1:00 AM    | 10/10/2015 1:00 AM  | Day         | 1        |   |
| LicenseCore  | License Violation Notification To Admin      | <input checked="" type="checkbox"/> | 8/26/2015  | 12:00 AM   | 10/10/2015 12:00 AM | Day         | 1        |  |

This page contains the following information:

| Field                  | Description  |
|------------------------|--|
| Module                 | The name of the module. Can be either LicenseCore or HeatModule. |
| Job                    | The name of the job.   |
| Enabled                | Specifies if the scheduled job is enabled.                       |
| Start Date             | The start date of this scheduled job.                            |
| Start Time             | The start time of this scheduled job.                            |
| Next Run Date and Time | The next date and time when the scheduled job runs.              |
| Recur Every            | The time period for the recurrence. Can be day, hour, or minute. |
| Interval               | The interval for the recurrence.                                 |

For each entry, the system displays additional information at the bottom of the page:

| Field  | Description  |
|--------|--|
| Module | The name of the module. Can be either LicenseCore or HeatModule. |

| Field    | Description  |
|----------|--|
| Job      | The name of the job.   |
| Run Time | The date and time when the scheduled job was run.                                |
| Details  | Details of the job. If the job is not successful, contains detailed information. |

- To see the job details in a larger format, click the **show details** icon at the end of the row.
- You can edit the details associated with the **License Violation Notification To Frs** and the **License Violation Notification to Admin** scheduled jobs.

To edit a scheduled job, do the following:

- Click the **Edit** icon at the end of the row. The system displays a dialog box.
- Enter or change any of the following information:

| Field              | Description   |
|--------------------|---|
| Job                | The name of the scheduled job. You cannot change this name. |
| Description        | A description of the scheduled job.                         |
| Start Date         | The start date and time.                                    |
| Enabled            | Specifies if the scheduled job is enabled.                  |
| Next Run Date Time | The next date and time when the scheduled job runs.         |
| Recur Every        | Specifies the recurrence for this job.                      |

- Click **Save**.

## Viewing Reports

You can view two types of reports in the License Manager:

- System audit information
- Logs

Follow these steps to view the reports.

- Log in to the License Manager.
- Click **Reports**.
- To view the system audit information, click **System Audit Information**. The system displays the **Reports - System Audit Information** page. See "System Audit Information Page" on the next page. Examples of the information on this page include license upgrades and license violations.

We recommend that you review the information on this page if you have any problems and then review the information on the **Log** page. See "Log Page " below.

#### System Audit Information Page

| Tenant Name | Event Log Date and Time | Subsystem              | Class   | Title  | Details  | Operation Result |  |
|-------------|-------------------------|------------------------|---------|--|--|------------------|--|
| SERVER2012  | 10/9/2015, 10:40:51 AM  | License Violation      | Warning | License Violation                                  | Empty Bundle for LoginHEATAdmin<br>Role: Admin and Tenant: SERVER2012  | Success          |  |
| SERVER2012  | 10/9/2015, 10:21:29 AM  | License Violation      | Warning | License Violation                                  | Empty Bundle for LoginHEATAdmin<br>Role: Admin and Tenant: SERVER2012  | Success          |  |
| SERVER2012  | 8/26/2015, 8:09:10 AM   | License Violation      | Warning | License Violation                                  | Empty Bundle for LoginHEATAdmin<br>Role: Admin and Tenant: SERVER2012  | Success          |  |
|             | 8/26/2015, 7:07:43 AM   | Data Integrity Service | Warning | Data Integrity Violation                           | Data integrity is corrupted for entity:<br>TenantLicense   | Success          |  |
|             | 8/26/2015, 7:06:55 AM   | License Upgrade        | Info    | Not a one-to-one upgrade. License<br>file: upgrade | Original License File Module: FRS<br>ITSM Availability Management Module<br>Named: 0 Concurrent: 10 Module: FRS<br>ITSM Change Management Module<br>Named: 3 Concurrent: 3 Module: FRS<br>ITSM Configuration Management<br>Module Named: 0 Concurrent: 0<br>Module: FRS ITSM Incident<br>Management Module Named: 10 | Success          |  |


This page contains the following information:


















| Field                   | Description  |
|-------------------------|--|
| Tenant Name             | The name of the tenant.  |
| Event Log Date and Time | The date and time of the log event.  |
| Subsystem               | The specific area. Can be license violation, license upgrade, or data integrity service. |
| Class                   | The type of information. Can be warning, info, debug, fatal, or error.                   |
| Title                   | A short description of the event.  |
| Details                 | A longer description of the event.   |
| Operation Result        | The result of the operation. Can be success or failure.                                  |

If you cannot see all of the columns, resize the columns that you can see so that the remaining columns are displayed.

- Click the **show details** icon at the end of the row to see the details. If you cannot see the **Show Details** icon, resize the columns until it is displayed.
- To view log information, click **Log**. The system displays the **Reports - Log** page. Use this information for troubleshooting.

#### Log Page

 Refresh

| Subsystem               | Event log time         | Details  | Log type  |
|-------------------------|------------------------|--|---|
| Named License Violation | 10/9/2015, 10:08:14 AM | System.InvalidOperationException: Collection was modified; enumeration op...   |  Error |
| Import License          | 10/9/2015, 10:06:29 AM | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Import License          | 10/8/2015, 5:25:20 PM  | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Import License          | 10/8/2015, 2:22:04 PM  | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Named License Violation | 10/8/2015, 12:19:44 PM | System.InvalidOperationException: Collection was modified; enumeration op...   |  Error |
| Import License          | 10/8/2015, 11:05:43 AM | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Email Notification      | 10/8/2015, 11:05:42 AM | Unable to send email with Subject: production - HEAT Service Management - ...  |  Info  |
| Import License          | 8/26/2015, 7:51:54 AM  | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Import License          | 8/26/2015, 7:47:31 AM  | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Named License Violation | 8/26/2015, 7:41:29 AM  | System.ArgumentNullException: Value cannot be null. Parameter name: url a...   |  Error |
| Import License          | 8/26/2015, 7:10:26 AM  | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Import License          | 8/26/2015, 7:07:44 AM  | Updating Named Bundles in the Tenant:SERVER2012 database.                      |  Info  |
| Import License          | 8/26/2015, 7:07:00 AM  | Updating total license counts in ConfigDB for the Tenant:SERVER2012 with n...  |  Info  |
| License Upgrade         | 8/26/2015, 7:06:55 AM  | End Upgrade file:  |  Info  |
| License Upgrade         | 8/26/2015, 7:06:55 AM  | Start Upgrade file:  |  Info  |
| Import License          | 8/26/2015, 7:06:54 AM  | Importing License file:USA-ServiceManagement-TC54-42651-54-UNSPECIFIE...       |  Info  |
| Configuration Service   | 8/26/2015, 6:22:00 AM  | System.NullReferenceException: Object reference not set to an instance of a... |  Error |

This page contains the following information:

| Field          | Description   |
|----------------|---|
| Subsystem      | The name of the subsystem. Can be email notification, import license, license upgrade, named license violation, or configuration service. |
| Event Log Time | The time and date of this log event.  |
| Details        | Information about this log event.   |
| Log Type       | The type of log. Can be info, error, or warning.  |

- To see the log details in a larger format, click the **show details** icon  at the end of the row.

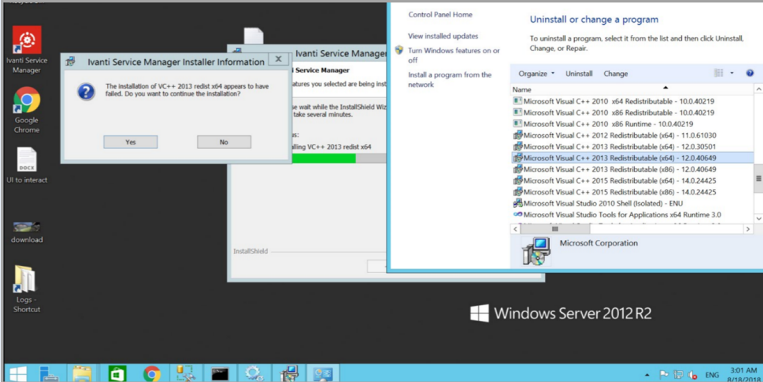
# Known Issues

Given below are the list of known issues in the 2018.3 release.

1. [Bug: 448051](#) - Installer prompts confirmation to continue due to "VC++ 2013 Redistribute x64 package" installation failure.
2. [Bug: 431858](#) - Installer sometimes fails to continue on Windows 2016 OS with the "MS SQL 2014 Shared Management Object" installation error.
3. [Bug: 443063](#) - Reporting installer does not support SQL2016 SSRS Reporting.
4. [Bug: 453068](#) - The remote server returns a (403) Forbidden error when configuring SSRS Reports using SQL 2016 database.
5. [Bug 448569](#) - The Message Queue Server, Integration Service Server, and Discovery Service configuration in SCW does not work for SSL. However, the SSL check box is provided in SCW.
6. [Bug 445672](#) - HEAT Classic migrated user fails to login to ISM post migration.

## Issue Details

### 1. Bug: 448051

|                   |   |
|-------------------|---|
| <b>Issue</b>      | Installer prompts confirmation to continue due to "VC++ 2013 Redistribute x64 package" installation failure.  |
| <b>Workaround</b> | <p>This error is observed when an installed instance of "VC++ 2013 Redistribute x64 package" exists on the application server. As a workaround, ignore this message and continue the installation.</p>  |

### 2. Bug: 431858

|                             |  |
|-----------------------------|--|
| <b>Issue and Workaround</b> | Installer sometimes fails to continue on Windows 2016 OS with the "MS SQL 2014 Shared Management Object" installation error. |
|-----------------------------|--|

If the QL SMO component is not already installed in the server Windows 2016 (or any other OS), then the installer identifies and installs. If it is already installed, then the installer does not show the mentioned component.

In case this issue is reproduced, as a workaround, you can download and install the component manually before installation of Ivanti ISM application.

Here is the MS download link: <https://www.microsoft.com/en-gb/download/details.aspx?id=42295>

### Detailed RCA

#### Case 1: Fresh installation of 2018.1.1 on Windows 2016 Enterprise server which has both SQL 2014, SQL 2016, SSRS 2016.

Scenario 1: SQL Server 2014 Management Objects and SQL Server CLR is already installed in the server.

Testing: Installer is listed only for the other missing prerequisites and not for smo components.

Result: No error

Scenario 2: Uninstall both SQL Server 2014 Management Objects and SQL Server CLR, which are already installed before initiating the new installation.

Testing: The installer listed all the missing prerequisites including the SMO.

Result: Installation continues with the SQL Server SMO and other prerequisites. The installation continues with no errors.

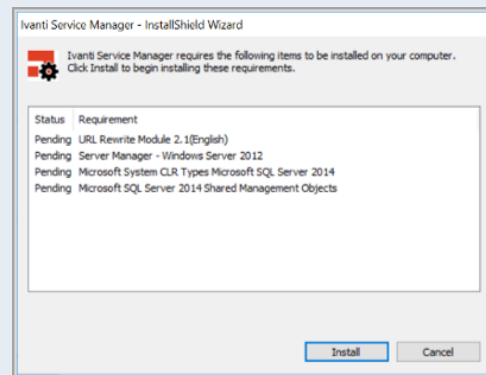
Scenario 3: SQL Server 2014 Management Objects and SQL Server CLR is already installed.

Testing: Rerun the installer continued with only the listing of the other missing prerequisites.

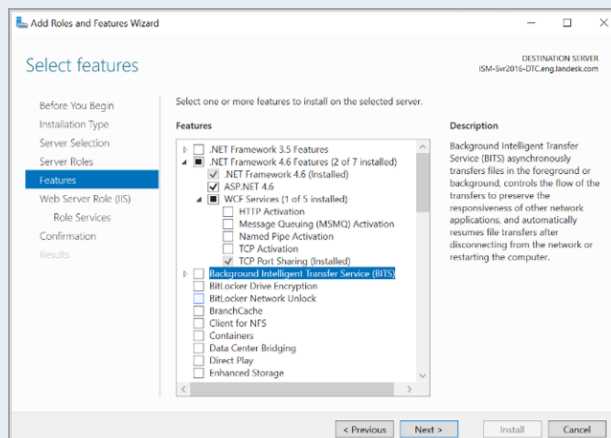
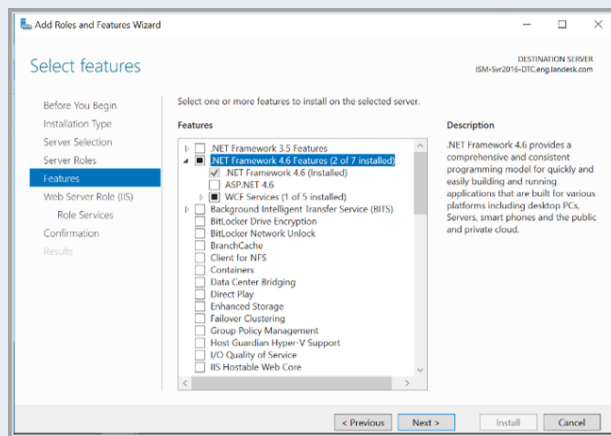
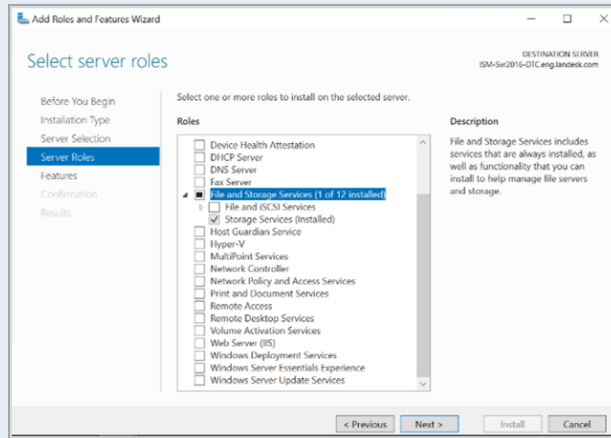
Results: No installation of the SMO component is prompted and the installation continues with no error.

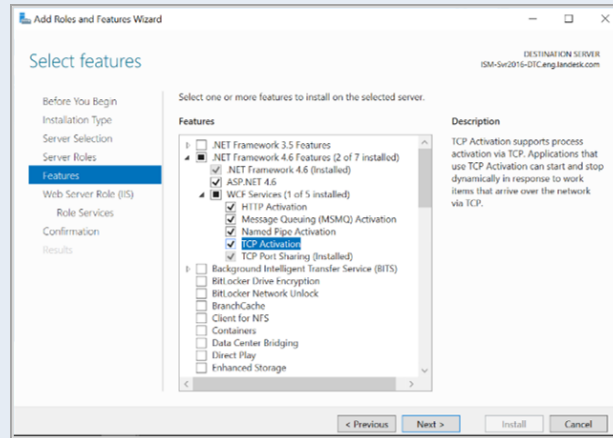
#### Case 2: Fresh installation of 2018.1.1 on Windows 2016 Enterprise server that has been newly imaged.

Scenario 1: Installation prompts the following components to be installed as shown below:

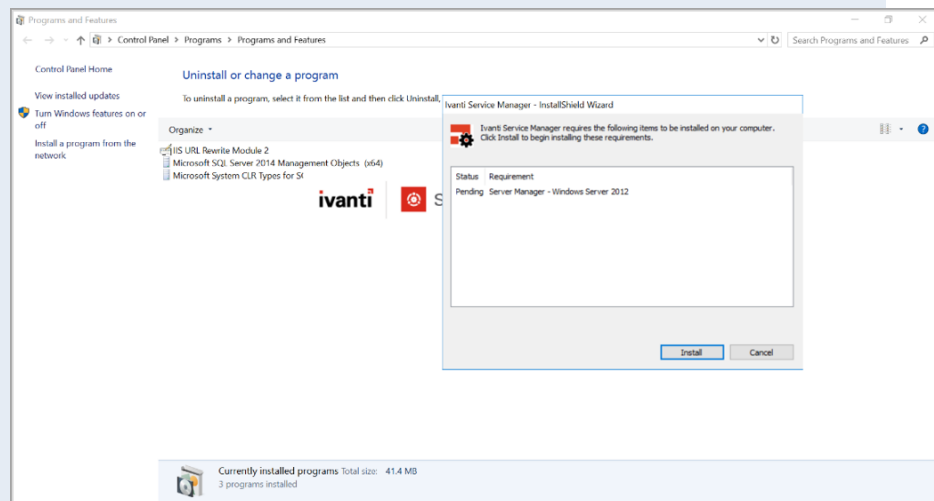


Make sure IIS is installed on Windows 2016 server before proceeding with the installation.





After IIS is installed with the above mentioned components, that includes WCF services, IIS 7.0 coreWebEngine, proceed with the ISM installation. Refer to the System Requirement Guide for IIS configuration details.



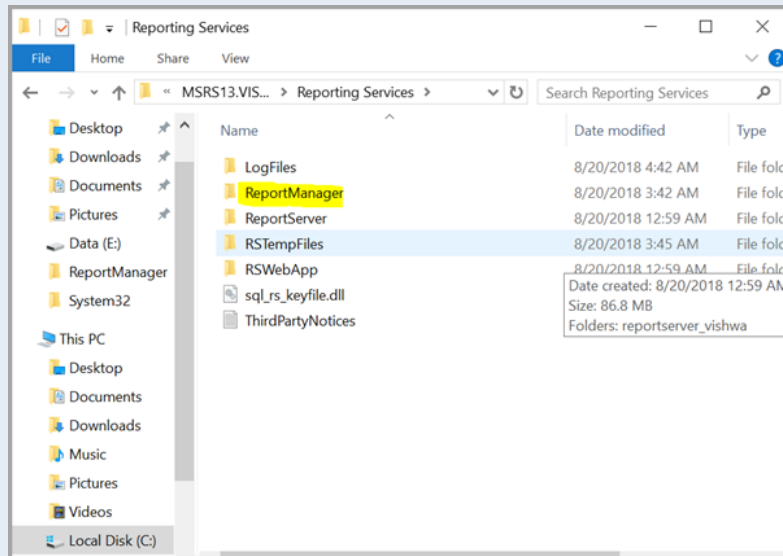
Relaunch the ISM installer to confirm already installed component does not get re-installed and hence prompting error.

### 3. Bug: 443063

|                   |   |
|-------------------|---|
| <b>Issue</b>      | Reporting installer does not support SQL2016 SSRS Reporting. The reason for not supporting is that the SSRS reporting configuration on SQL 2016 server fails due to missing configuration (ReportManager) during installation. The SQL 2016 Reporting server installation does not configure 'ReportManager' by default. Due to this, provisioning of the report does not work using SCW, which results in various errors like copy file, missing files, etc. |
| <b>Workaround</b> | <p><b>SQL Database</b></p> <ol style="list-style-type: none"> <li>1. Install the SQL 2016 Reporting server as administrator user instead of domain user.</li> </ol>   |



- Post Install Make sure that ReportManager folder and files inside folders are exists. If this folder does not create, you can copy from the existing working ReportManager configuration from SQL 2014 reporting server.



4. **Bug: 453068**

|                   |  |
|-------------------|--|
| <b>Issue</b>      | The remote server returns a (403) Forbidden error when configuring SSRS Reports using SQL 2016 database. SSRS reporting is not supported on SQL 2016 database due to inconsistent behavior in report configuration.        |
| <b>Workaround</b> | <ul style="list-style-type: none"> <li>Keep the SSRS reporting configuration on the existing reporting servers like SQL 2014 or lesser.</li> <li>Reporting upgrade as part of 2018.1.1 upgrade must be ignored.</li> </ul> |

5. **Bug: 448569**

|                   |  |
|-------------------|--|
| <b>Issue</b>      | The Message Queue Server, Integration Service Server, and Discovery Service configuration in SCW does not work for SSL. However, the SSL check box is provided in SCW. |
| <b>Workaround</b> | Do not select the SSL check box for the above services.  |

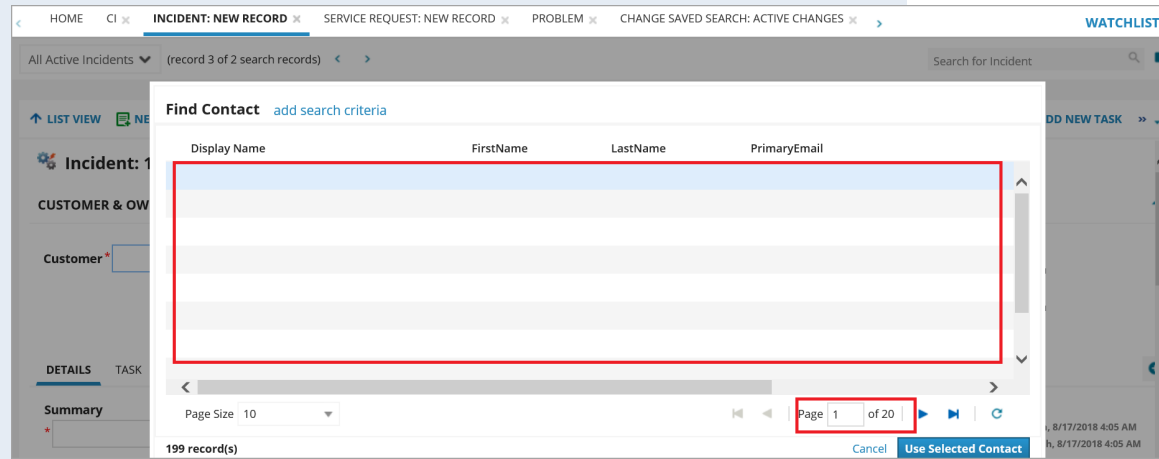
6. **Bug: 445672**

|              |  |
|--------------|--|
| <b>Issue</b> | HEAT Classic migrated user fails to login to ISM post migration. |
|--------------|--|

Post Migration, you may still see some discrepancies like missing information in each business objects.

You may not be able to create incident as some customer information does not have the required field, employee name, description etc.

**Workaround**



Post migration , update all the employees details such as Display name, First name, Last name, Org, etc. or delete and re-create the employee's information, before creating any business requests like incidents, problems, service requests etc.

# Troubleshooting

If you have problems with your installation or deployment, check this section first.

- "Error Messages" below
- "Software Problems" on page 183

## Error Messages

- "Login Errors" below
- "Upgrade Errors" on page 177
- "Backup Error" on page 178
- "Database Migration Errors" on page 178
- "Microsoft SQL Execution Errors" on page 180
- "Update Key Not Found Warnings" on page 180
- "Workflow Warnings" on page 183

## Login Errors

### Error Message

```
Error upon executing commands: The following error occurred when authenticating with the tenant
<tenantUrl>.
Status: TenantNotFound
```

### Possible Cause

The tenant that you specified is invalid.

### Solution

Ensure that the tenant URL and tenant ID are valid.

### Error Message

```
Error upon executing commands: The following error occurred when authenticating with the tenant
<tenantUrl>.
Status: AccessDenied
```

### Possible Cause

You entered an invalid user name or password.

## Solution

Ensure that the user name and password are valid.

## Error Message

```
Error upon executing commands: The following error occurred when authenticating with the tenant APPSERVER.  
Status: InvalidRole
```

## Possible Cause

You do not have administrator rights.

## Solution

Ensure that you have administrator rights. See "About Roles" on page 41.

## Error Message

```
Error upon executing commands: Could not establish trust relationship for the SSL/TLS secure channel with authority '<IP_address>'.
```

## Possible Cause

You did not connect to the Ivanti Service Manager application server using HTTPS.

## Solution

Configure the Ivanti Service Manager application server to use SSL. See "Optional SSL Configuration" on page 129. Enter the URL for the Ivanti Service Manager application server that is configured to use SSL.

## Error Message

```
Failed to execute applyPatch: The remote server returned an unexpected response: (400) Bad Request.
```

## Possible Cause

The database version is not up to date.

## Solution

If the system table upgrade fails, review the log files and fix any metadata issues. Then upgrade the system table.

## Problem

Cannot view the login dialog box. A message says:

Please use your subdomain when accessing the application, for example `https://yourname.saas.heatsoftware.com`

## Possible Cause

The web.config file parameter "RequireTenantIdInURL" value is set to true.

## Solution

1. Go to C:\Program Files\HEAT Software\HEAT\AppServer\ and open the web.config file.
2. Search for the parameter "RequireTenantIdInURL" and change its value to false.
3. Save and close the web.config file.

## Upgrade Errors

### Problem

After upgrading to the latest version of Ivanti Service Manager, the list of tenants in the Operations Console is empty.

### Possible Cause

During the upgrade, the system updated the connection strings for the landscape with the incorrect name for the data source.

### Solution

In the Operations Console, edit each landscape to update the data source to the correct database server name. See "Upgrading Ivanti Service Manager from an Earlier Release" on page 147 for more information on how to do this.

## Error Message

Failed to execute applyPatch: The request channel timed out while waiting for a reply after 00:59:59.7741622. Increase the timeout value passed to the call to request or increase the sendTimeout value on the binding. The time allotted to this operation may have been a portion of a longer timeout.

## Possible Cause

By default, the upgrade tool is set to wait for one hour for a response from the Ivanti Service Manager application server. This message indicates that the Ivanti Service Manager application server is still applying the patch or package. The patch can be completed at any time.

## Solution

Check the status of the upgrade tool later by looking at the patch log in the Configuration Database.

## Backup Error

### Error Message

```
No database backup location specified in configuration database. Please contact support.  
Backup failed for Server 'db_server'.
```

### Possible Cause

- The backup location is not set in the configuration database.
- The backup failed to execute because of permissions issues.

### Solution

Ensure that you have set the backup location and ensure that you have the correct permissions.

## Database Migration Errors

### Error Message

```
Error during metadata commit operation: System.Exception: The following errors were encountered when synchronizing the schema....
```

## Possible Cause

This indicates a serious problem in business object metadata and is a synchronization schema error. The system cannot synchronize the database schema change with the business object definition. If you get this error, the system usually stops upgrading the metadata.

## Solution

If this happens in your production environment, restore the database from a backup that was made before the upgrade. Then contact Ivanti support so that they can look into the error. See "How to Contact Us" on page 6.

## Error Message

```
Error during metadata commit operation: DataLayer.SaaSdbException:  
Invalid object name 'Frs_ITFM_Account_Status'. --->  
System.Data.SqlClient.SqlException: Invalid object name 'Frs_ITFM_  
Account_Status'.
```

## Possible Cause

Part of the database is corrupt.

## Solution

Contact Ivanti Software support. See "How to Contact Us" on page 6. They may suggest that you restore the database from a backup that was made before the upgrade.

## Error Message

```
Error during metadata commit operation:  
System.Reflection.TargetInvocationException: Exception has been  
thrown by the target of an invocation. --->  
System.NullReferenceException: Object reference not set to an  
instance of an object.
```

## Possible Cause

Part of the database is corrupt.

## Solution

Contact Ivanti Software support. See "How to Contact Us" on page 6. They may suggest that you restore the database from a backup that was made before the upgrade.

## Microsoft SQL Execution Errors

### Error Message

```
An error occurred when applying patch named <some_filename>.sql in
package <some_package>.MetadataPackage to tenant <tenantUrl>.
Unable to execute SQL due to Invalid column name 'IPCMUrlPort'.:
update FRS_IPCM_Integration set IPCMUrlPort = 2323 where IPCMUrlPort
is null
Unable to execute SQL due to Invalid column name 'IPCMUrl'.:
update FRS_IPCM_Integration set IPCMUrl = 'http://' + IPCMUrlServerHost
+ ':' + convert(varchar(6), IPCMUrlPort) where IPCMUrl is null and
IPCMUrlServerHost is not null
```

### Possible Cause

An embedded Microsoft SQL statement is corrupt.

### Solution

Review the Microsoft SQL statements.

## Update Key Not Found Warnings

### Error Message – Business Object

```
Error during metadata update operation. MetadataType: BusinessObject,
ID: Frs_AuthenticationProvider#
SaaS.StandardizedMetadata.UpdateKeyNotFoundException: Update key not
found: key = Rel2s
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences)
at DataLayer.MetadataPatch.ApplyGroupedActions(IMetadataProvider
provider, ISessionContext sessionContext, IEnumerable`1
definitionGroup) in
c:\depot\Eng\SaaS\main\Platform\AppServer\MetadataServices\MetadataPa
tch.cs:line 1034
```

### Possible Cause

There is a problem updating the metadata and the system did not update the business object.

### Solution

Review the business object to make sure it was updated.



**Error Message – Form**

```
Error during metadata update operation. MetadataType: Form, ID:
Task.WorkOrder System.Exception: Update key not found: key = Details
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1377
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1359
at DataLayer.MetadataPatch.ApplyGroupedActions(IMetadataProvider
provider, ISessionContext sessionContext, IEnumerable`1
definitionGroup) in
c:\depot\Eng\SaaS\main\Platform\AppServer\MetadataServices\MetadataPa
tch.cs:line 1016
```

**Error Message – Dashboard**

```
Error during metadata update operation. MetadataType: Dashboard, ID:
8e2cce05-c593-4545-bf4d-5f719a9bd5a5 System.Exception: Update key not
found: key = OLA Target Compliance ( e94a602f-959e-4cf1-9c07-
be4d5eb0da68 )
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1377
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1359
at DataLayer.MetadataPatch.ApplyGroupedActions(IMetadataProvider
provider, ISessionContext sessionContext, IEnumerable`1
definitionGroup) in
c:\depot\Eng\SaaS\main\Platform\AppServer\MetadataServices\MetadataPa
tch.cs:line 1016
```

## Error Message – Validation Data

```
Error during metadata update operation. MetadataType: ValidationData,
ID: Justification# System.Exception: Update key not found: key =
Justification#_culture#pt-BR
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1377
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1359
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1359
at DataLayer.MetadataPatch.ApplyGroupedActions(IMetadataProvider
provider, ISessionContext sessionContext, IEnumerable`1
definitionGroup) in
c:\depot\Eng\SaaS\main\Platform\AppServer\MetadataServices\MetadataPa
tch.cs:line 1016
```

## Error Message – Rule

```
Error during metadata update operation. MetadataType: Rule, ID:
Incident# System.Collections.Generic.KeyNotFoundException: The given
key was not present in the dictionary.
at System.Collections.Generic.Dictionary`2.get_Item(TKey key)
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1386
at SaaS.StandardizedMetadata.MetadataExtensions.Patch(XElement
element, XElement differences) in
c:\depot\Eng\SaaS\main\Platform\StandardizedMetadata\MetadataExtensio
ns.cs:line 1359
at DataLayer.MetadataPatch.ApplyGroupedActions(IMetadataProvider
provider, ISessionContext sessionContext, IEnumerable`1
definitionGroup) in
c:\depot\Eng\SaaS\main\Platform\AppServer\MetadataServices\MetadataPa
tch.cs:line 1016
```

## Possible Cause

There is a problem updating the metadata.

## Solution

You do not need to do anything.

## Workflow Warnings

### Error Messages

```
Error during metadata delete operation. MetadataType: Workflow, ID:
69d31c7248b54f92bc1bfff415cd29e0f System.Exception: Could not
deactivate workflow definition RecId:
69d31c7248b54f92bc1bfff415cd29e0f ---> System.Exception: Error
updating existing active workflow definition to inactive, RecId
69d31c7248b54f92bc1bfff415cd29e0f
at SaaS.WebUI.WorkflowMetadataServices.WorkflowMetadataUpdate.Delete
(MetadataType metadataType, String id) in
c:\depot\Eng\SaaS\main\Platform\AppServer\BPE\src\WorkflowMetadataSer
vices.cs:line 409
Error during metadata insert operation. MetadataType: Workflow, ID:
871d9466c4754fa19ffb03de179cd057 System.Exception: Inactive
definition exists with the same RecId: Name:LDAP Sync_LC_
133k134k135k13k14k15k16k17k18k19k, ObjectType:ScheduleEntry,
Definition RecId 871d9466c4754fa19ffb03de179cd057 at
SaaS.WebUI.WorkflowMetadataServices.WorkflowMetadataUpdate.CreateWork
flowDefinition(String name, String objectType, String defRecId,
String typeRecId, XElement workflow) at
SaaS.WebUI.WorkflowMetadataServices.WorkflowMetadataUpdate.Insert
(MetadataType metadataType, XElement workflow) at
SaaS.StandardizedMetadata.MetadataProvidersContainer.Insert
(MetadataType metadataType, XElement definition) at
DataLayer.MetadataPatch.ApplyGroupedActions(IMetadataProvider
provider, ISessionContext sessionContext, IEnumerable`1
definitionGroup)
```

### Possible Cause

There is a problem updating the workflows.

### Solution

You do not need to do anything.

## Software Problems

- "Discovery cannot detect assets on the network." on the next page
- "System cannot search." on the next page
- "The Ivanti Service Manager demo database does not load properly." on the next page
- "Web servers do not work correctly." on page 185
- "Provision report now returns an exception: Cannot Decrypt the Symmetric Key." on page 185

- "Dashboard and report controls (such as charting, pivoting, and copy/paste) and the Service Catalog attachment control do not work." on page 186
- "Cannot download or edit reports in Chrome." on page 186
- "Cannot download or edit reports in Firefox." on page 186
- "Cannot download files or run controls in Internet Explorer." on page 187
- "Cannot open websites in Internet Explorer." on page 187
- "Logging into a tenant using Internet Explorer fails. " on page 187
- "Unable to use integrated components, such as Voice." on page 188

### **Problem**

Discovery cannot detect assets on the network.

### **Possible Causes**

- Service Center Configuration Manager (SCCM) service is stuck in starting mode.
- You are using a domain account for running all Ivanti Service Manager services but the domain account has insufficient rights.

### **Solution**

Use your local system account and restart Ivanti Service Manager.

### **Problem**

System cannot search.

### **Possible Cause**

Full-text search is disabled.

### **Solution**

Enable full-text search. See "Enabling Full-Text Search" on page 51.

### **Problem**

The Ivanti Service Manager demo database does not load properly.

### **Possible Cause**

Full-text search is disabled.

### **Solution**

Enable full-text search. See "Enabling Full-Text Search" on page 51.

### **Problem**

Web servers do not work correctly.

### **Possible Cause**

In multi-server environments, each Ivanti Service Manager web server must meet the system requirements.

### **Solution**

Refer to the *System Requirements and Compatibility Matrix for Ivanti Service Manager* for more information.

### **Problem**

Provision report now returns an exception: `Cannot Decrypt the Symmetric Key`.

### **Possible Cause**

The Ivanti Service Manager reporting server cannot use the symmetric key to access the data from the report server database.

### **Solution**

1. Click **OK**, but do not close the System Configuration Wizard.
2. Start the Reporting Services Configuration Manager and connect to your Microsoft SRSS instance.
3. Select **Encryption Keys** from the list in the left panel.
4. Click **Delete** and then click **Yes** at the confirmation message.
5. Return to the wizard and click **Provision Report Now**.

## Problem

Dashboard and report controls (such as charting, pivoting, and copy/paste) and the Service Catalog attachment control do not work.

## Possible Cause

Browser does not have, or does not support, Adobe Flash.

## Solution

- Install Adobe Flash. Go to <https://get.adobe.com/flashplayer/>.
- If your current browser does not support Adobe Flash, upgrade the browser.

## Problem

Cannot download or edit reports in Chrome.

## Possible Cause

The Chrome ClickOnce extension is not installed.

## Solution

Install the ClickOnce extension for Chrome. Navigate to <https://chrome.google.com/webstore/detail/eeifaoomkminpbeebjdmdojbhmagnc/#> and download the extension.

## Problem

Cannot download or edit reports in Firefox.

## Possible Cause

The Firefox Microsoft .NET framework assistant extension is not installed.

## Solution

Install the Microsoft .NET framework assistant extension. Navigate to <https://addons.mozilla.org/en-US/firefox/addon/9449> to download the extension.

## Problem

Cannot download files or run controls in Internet Explorer.

## Possible Cause

Scripting is disabled.

## Solution

Set properties in Internet Explorer as follows:

1. Go to the **Tools > Internet Options > Security > Custom level** page.
2. Set the following options to **enable**:
  - Run ActiveX controls and plug-ins
  - File download
  - Scripting > Active scripting

## Problem

Cannot open websites in Internet Explorer.

## Possible Cause

You have not set Ivanti Service Manager to be a trusted site.

## Solution

Set properties in Internet Explorer as follows:

1. Go to the **Tools > Internet Options > Security** page.
2. Highlight **Trusted sites** and click **Sites**.
3. Click **Add**.

## Problem

Logging into a tenant using Internet Explorer fails.

Internet Explorer displays this message: **You cannot login to the system now. Please contact your administrator. Additional information is available in the logs.**

### **Possible Cause**

Internet Explorer does not accept cookies if the host name of the DNS server or the server NetBIOS names contain an underscore '\_'.

### **Solution**

- Change the host name of your DNS server or its NetBIOS names so they no longer contain an underscore '\_'.
- Use a Chrome or Firefox browser.

### **Problem**

Unable to use integrated components, such as Voice.

### **Possible Cause**

You must use the Microsoft Windows operating system when you use integrated components.

### **Solution**

Change to the Microsoft Windows operating system. Refer to the *System Requirements and Compatibility Matrix for Ivanti Service Manager* for more information.