



Installation

Help Documentation

Installing SmarterTrack

These requirements are not applicable to those using the Hosted SmarterTrack Helpdesk.

SmarterTrack comes as a single installation file that contains everything necessary to install the product and get it set up on your server, regardless of the Edition that you intend to use. The features available are based on the license used during the activation process; if no license is entered, the Free Version will be installed. The SmarterTrack installer can be downloaded from the SmarterTools website . Before you get started, however, make sure you have the following:

- A server or VM with Windows Server 2008 R2 or higher installed
- IIS set up and configured
- Microsoft SQL or MySQL installed. (If using MySQL or a variant like MariaDB, you should also have a default "SmarterTrack" database set up that SmarterTrack can connect to.)

Installation on a Server

SmarterTrack starts by installing the overall application and application files. This is just like any standard program installation: you start the installation, select the path for the installation and then agree to the SmarterTrack license terms and conditions.

You'll be able to track the progress of the installation as SmarterTrack is configured on the server. Once the initial file installation occurs, the next step is walking through the IIS Configuration Tool. This includes:

- Verification that IIS is installed. If IIS isn't present, the installation will actually IIS for you as it is a requirement for SmarterTrack.
- A check to see if a SmarterTrack site already exists on the server. If not, one can be created. If a site already exists, you can select that site and use it for your installation. Using an existing site is perfect for users who are simply upgrading their installation to the latest version.
- If setting up a new site, you set the site name, set your hostname, select the IP(s) to use for the installation and the file path for the Management and Reporting Server (MRS). If using an existing site, these steps are bypassed; you're asked to select the site you wish to use for the installation.
- After setting up your new site, SmarterTrack will create an app pool using that site name, then set up as a site in IIS that uses the new app pool.
- Next, the necessary permissions are set for the site.
- Finally, the installation is verified.
- Once everything is verified, the Getting Started Wizard opens using the server's default browser. (If a default browser is not set, you'll be offered options on which browser to use.)

Getting Started Wizard

The Getting Started Wizard is a simple, yet complete, 3-step process to get SmarterTrack up and running on a server. Using it, you walk through 3 pages where you:

- **Set Up / Connect To a Database** - As mentioned, SmarterTrack requires a database back end for storing tickets, live chats, KB articles and more. Therefore, part of the Getting Started process is telling SmarterTrack not just the type of database to use, but the database name as well. If using Microsoft SQL, you'll see the following: If using MySQL (or a variant), you'll see the following: Regardless of which type of database you use, once your settings are input, and you hit the Next button, SmarterTrack will start running through the necessary SQL commands to start constructing the tables and relationships necessary for SmarterTrack to run.
- **Configuration** - After your database is set up, you'll activate SmarterTrack with your license key. (If you don't have one, you can skip it and SmarterTrack will run as the Free Edition.) You'll then create your "Administrator / Employee", who will act as the Administrative account for your SmarterTrack installation as well as your first Employee. (If you want this account to ONLY act as the Administrator for SmarterTrack, you can remove the Agent Role from the account AFTER you have created additional Agents.) You will also add information about your company, such as your company name, a company logo, etc.
- **Completed** - Finally, you're ready to use SmarterTrack. The last page of the Getting Started Wizard offers up 2 areas to move to next: the Management Interface or the Portal. Regardless of where you go, you'll already be logged in with the Administrator / Employee account you created earlier. First, the Management Interface is where you'll go to begin adding in your Departments and Groups as well as additional Agents, as needed. For information on these items, and how to set up SmarterTrack to fit your particular needs, see the Company Organization page to see how certain types of businesses can organize their installation. Going to the Portal, you'll see your logo, company name and other company information displayed, as well as your Employee's name in a drop down button. (Clicking that button will allow you to log into the Management Interface as well.) The Portal is where customers will go to submit tickets, start live chats, read knowledge base articles and more. It's the customer-facing part of SmarterTrack that your users will see.



Database Setup



Configuration



Completed

SmarterTrack

Database Connection

A database is required to use SmarterTrack. SmarterTrack can use Microsoft SQL Server (Express, Web, Standard, or Enterprise Editions) or MySQL Server. For more information on how to install a database, refer to the online Help.

Server Type

Server Name

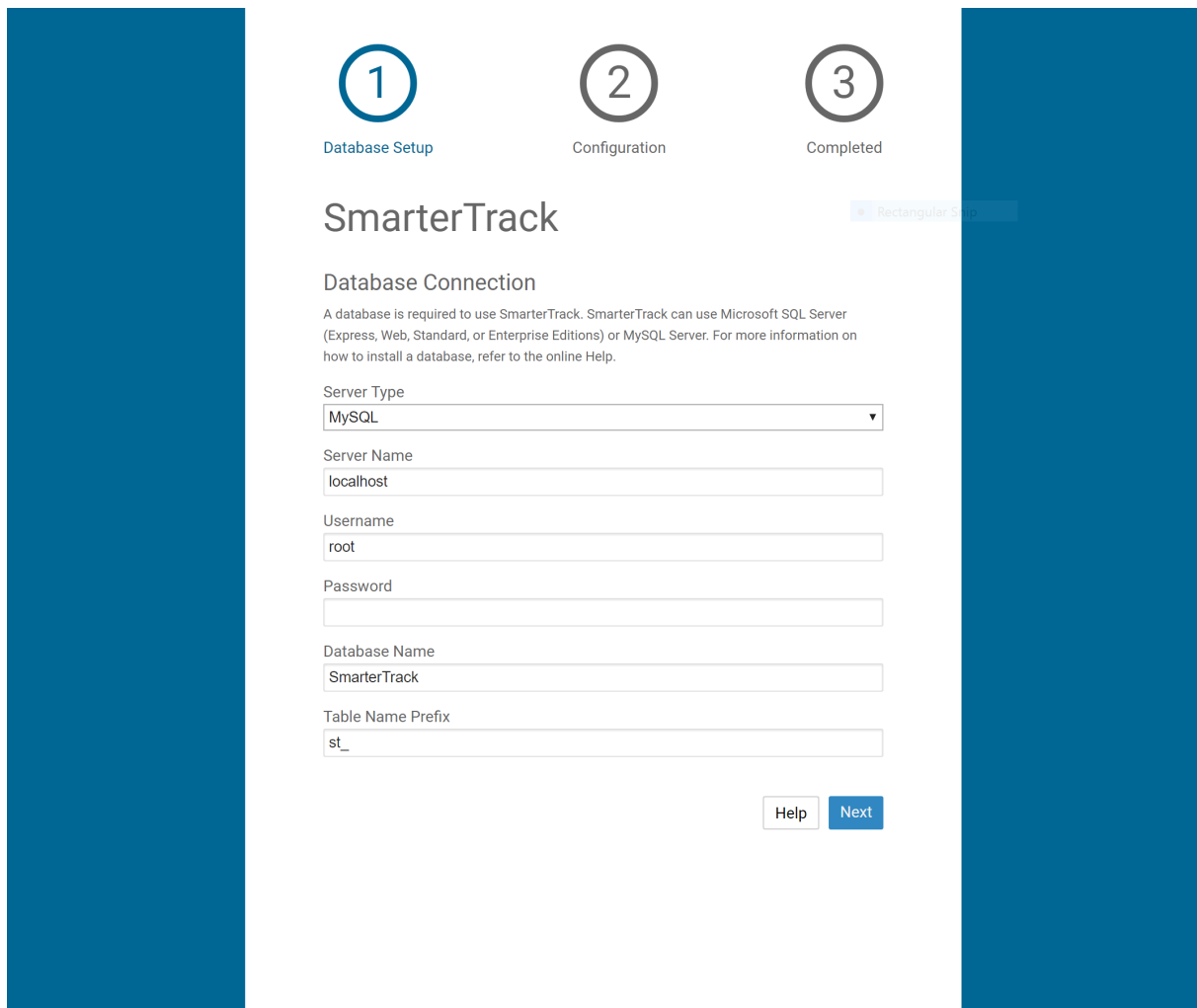
Authentication

Username

Database Name

Table Name Prefix

[Help](#)[Next](#)



The image shows a three-step installation process for SmarterTrack. Step 1, 'Database Setup', is the active step. Step 2, 'Configuration', and Step 3, 'Completed', are shown as completed. The main heading is 'SmarterTrack'. Below it, the 'Database Connection' section provides instructions and a form. The form includes fields for Server Type (MySQL), Server Name (localhost), Username (root), Password, Database Name (SmarterTrack), and Table Name Prefix (st_). There are 'Help' and 'Next' buttons at the bottom right.

1 Database Setup 2 Configuration 3 Completed

SmarterTrack

Database Connection

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Server Type
MySQL

Server Name
localhost

Username
root

Password

Database Name
SmarterTrack

Table Name Prefix
st_

Help Next

Installation to a Shared Server

Please refer to the KB article [Installing SmarterTrack on a Shared Server](#) for step-by-step installation instructions for this environment.

Activation on Hosted SmarterTrack

Customers using the hosted solution of SmarterTrack will have access to the application shortly after activating a free trial or purchasing a paid subscription. Because SmarterTrack is already installed on servers owned and maintained by SmarterTools, hosted service customers do not need to worry about installation. However, they will need to follow the instructions provided in their welcome messages to activate and set up their hosted site.