

HEAT[®] Service & Support TM

Version 8.4.0

July, 2006
Readme

See the Application Notes for special notes when installing / upgrading the HEAT Self Service server, HEAT Link to LDAP, and HEAT Asset Tracker.

Please read this entire document. It contains important information for a smooth installation and operation of HEAT Service & Support version 8.3.8.

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1. What's New in HEAT Service & Support 8.4?

Call Logging Dashboard

The Call Logging Dashboard is a utility that

1. Displays commonly used metrics (Open Incidents by Call Type, Priority, and incidents received by month.
2. Provides a section to access personal call groups
3. Provides easy access to HEAT Broadcast messages

Updated UI in Call Logging and Administrator

The User Interface has been updated in a number of places to assist with better usability and navigation. The following is a summary of changes:

- Updated Toolbar icons in Call Logging
- Updated Menu Items in Call Logging
- Dock able InfoCenter in Call Logging
- Added UI Themes to Call Logging
- Updated Quick Start menu in HEAT Administrator to assist with navigation
- Updated UI for Hours Of Operation Utility in HEAT Administrator

Sort Capable Grids

Some grids in Call Logging have been updated to include the capability of sorting the data by dragging and dropping the grid header. Areas where the grid sorting is available:

- Call Record Browse
- Activity Log
- Assignment Grid
- Journal Grid

Ability to Run Auto Ticket Generator as an NT Service

Auto Ticket Generator is a module of HEAT Service and Support that can monitor an email box or file share, then create incident records, or update existing records based upon definitions defined by the user. HEAT 8.4 allows the user to run Auto Ticket Generator as an NT Service, or in the traditional application mode.

2. Application Notes

Note to Users with HEAT Asset Tracker

Once upgraded to HEAT Service & Support 8.4, HEAT Asset Tracker users will no longer be able to create HEAT Archive Files with HEAT Asset Tracker. FrontRange Solutions recommends using the database tools to perform back-ups.

NOTE: HEAT Asset Tracker integration is only supported using MSSQL or Oracle as the database platform. Microsoft Access is not supported in this configuration.

Note to Users launching reports from HEAT, Answer Wizard, or Crystal.

Crystal 9.0 Runtime requires .NET 1.1 for installation. If users attempt to install HEAT 8.4 using the without .NET version 1.1 installed, the installation will error and not complete. To install HEAT and the HFW functions successfully, .NET1.1 must be installed. Please note that if .NET 2.0 is installed, the user will still have to have .NET 1.1 installed.

Using an HFW function within a report requires that the user supply a USERID and PASSWORD to the HEAT Database. However, configuring the GMLOGIN.SEC file correctly, and pushing it to the WINNT or Windows directory to all machines running the report will prevent the user from having to enter the database's USERID and PASSWORD

For reports to run successfully, users maybe required to perform a "Set Location" on the report. A set location points the report to the proper database when run. To perform a "Set Location", execute the following steps:

- 1.) Open the Report in Crystal Designer.
- 2.) Select the **Database >> Set Data source Location** menu item from inside the report.
- 3.) Under the Current Data Source pane select the table name which needs to be changed
- 4.) Under the Replace with Pane browse to then select the matching table in the correct data source.
- 5.) When both items are selected click the update button.

Note to Oracle 10g users

Due to the way the Oracle ODBC driver handles cursors, users of Oracle 10g must perform the following steps:

- 1.) Open the Advanced HEAT Configuration Tool.
- 2.) Under the Registry Key drop down, select Common.
- 3.) Locate the "Refresh" entry name in the "ODBC" Section.
- 4.) Type the value "0" where in the text box that has a value of "(undefined)"
- 5.) Click Apply.

Failure to do so will cause issues when viewing the Call Log grid view.

Integration with IT Service Management Modules

HEAT 8.3.7 or later is required to integrate with the ITSM Modules Version 5.0.4 or later.

HEAT Self Service Installation

HEAT Service & Support 8.4 requires HEAT Self Service version 8.4 to for correct operation.

Use of Custom Calendars

For the enhanced @dateadjust and @timeadjust AutoTask functions to adjust dates and times according to custom calendars (Help Desk Hours included) using AutoTasks or BPAM, the Administrator will need to edit the calendar, save it, and the edit back to the original state.

HEAT 8.4 System Requirements

HEAT 8.4 operates in Microsoft® Windows® 2000 (SP4) or higher, Windows® XP (SP2) or higher, Windows Server™ 2003 (SP1) or higher.

Please refer to the HEAT 8.4 documentation for further information on system requirements.

Allowing Editing Memo Fields through Table Maintenance in a SQL Database

A known limitation of SQL Server and ODBC requires that a table possess a primary key or unique index in order for the Database Cursor to be updateable. If a table does not have a primary key set, then users will experience errors when trying to edit a memo field, on that table, through the Table Maintenance interface.

Previewing HEAT 8.4

If you are an existing HEAT customer and would like to preview the new HEAT 8.4 features, install on a machine that does not have HEAT, then choose the Custom Setup when installing. You will have the option to install both the Quick Start Wizard Starter database and a HEAT 8.4 Demo database, which contain sample customer information and sample calls. If you choose to install the MS Access demo database, the data source name (DSN) is HEAT Demo; the two primary login IDs are “Sandy” and “Chris” and the password is “manage” for both IDs. Each login ID will show a different security view of HEAT to demonstrate the security based forms view feature.

Processor Usage when using Profile or Configuration Rules

When using Profile or Configuration Rules, administrators may notice an increase of Processor Usage on the database server. This increase only occurs during the BPAM rule confirmation query, which looks for changes in rules or AutoTasks. FrontRange Solutions recommends, if using Profile or Configuration Rules, to expand the time between these types of queries. By default, the query time is set for every 2 hours, FrontRange Solutions recommend changing this to at least every 4 hours.

Using the All Existing Tickets Option when Creating or Editing BPAM Rules

If the user decides to apply a new or edited rule to all existing records in the database, BPAM will process each record that applies twice.

Enabling the LANDesk, SMS, or NetCensus Menu in the Administrator Module

FrontRange Solutions has removed the menu item from the Administrator Module to integrate with LANDesk, SMS, or NetCensus. To re-enable this menu requires a database setting in the HEATINI table.

If the entries do not exist, or exist but the contents field has a value of 0, the menu items do not show up. To enable the menu, the Contents field must be populated with a 1.

INISection	INIEntry	Contents
NetCensus	Enabled	0
MS SMS	Enabled	0
LANDesk DTI	Enabled	0

3. Installing HEAT® Service & Support™ 8.4

NOTE: HEAT Systems utilizing HEAT Asset Tracker, HEAT Self Service, or HEAT Link to LDAP must also upgrade HEAT Asset Tracker to HEAT Asset Tracker Version 8.03, HEAT Self Service to HEAT Self Service 8.4, and HEAT Link to LDAP to HEAT Link to LDAP 8.4.

The HEAT 8.4 installation program displays step-by-step instructions that let you install HEAT Program Files, Demo FLS Data, Report Files, or the Online Books Installation Program.

To begin the installation process:

1. Close any open applications.
2. Double-click the HEAT 8.4 executable downloaded from NetUpdate.
3. Install HEAT installation files to a temporary directory.
4. Double-click the Setup.exe.
5. Follow the on-screen instructions to complete the installation.

You will also need to setup a 32-bit ODBC data source using the System DSN tab to point to your database. For detailed instructions, please refer to the Installation Guide (InstallGuide.pdf) located in the \Documentation directory on the HEAT 8.4 CD.

Note: Upgrading to HEAT 8.4 from HEAT 8.3.8 or lower requires the Administrator to update the database. This can be done through loading a HAF file after install, or by updating the database through the Administrator Module.

4. Bug Fixes and Enhancements included in HEAT 8.4

RM 5462 – (ITS 36050) Using the icon left of File Menu to close alert definition will hang Alert Monitor.

RM 5469 – (ITS 34951) Upgrading HEAT database creates “phantom” Customer Groups.

RM 5487 – (ITS 37693) User experiences ODBC error when editing the Call Map in the HEAT Administrator when using Oracle 10g.

RM 5490 – (ITS 38278) Adding a Customer Type greater than 15 characters causes truncation errors within the application.

RM 5546 – (ITS 28706) Adding maximum range when creating Hours of Operation will cause HEAT Administrator to crash.

RM 5594 – (ITS 34770) ConfigType field is not the same length in different tables in database.

RM 5614 – (ITS 33983) When creating a “Create Ticket” action in ATG, mapping a memo field to a Field From Body, will not copy the entire contents to a Return.

RM 5619 – (ITS 37520) Validation constraints will cause ATG ticket creation to stop if field order is non-alphabetical.

RM 5663 – (ITS 36836) Copy call AutoTask fails when a ticket is abandoned.

RM 5668 – (ITS 35484) Clicking on the CallDesc field in the Call History window causes an error.

RM 5686 – (ITS 34286) InfoCenter dock is lost when exiting and re-entering Call Logging.

RM 5696 – (ITS 34790) Information Queries cause ATG to crash.

RM 5706 – (ITS 36811) AutoClose from HEATBoard will not close the call if the “Copy Close-Required” option is unchecked.

RM 5944 – (ITS 28202) ATG fails if the same email is associated with different profiles from different customer types.

RM 6001 – (ITS 30515) Context menu “New Call Record” only works from the Call Log tab. Now works from all tabs.

RM 6038 – (ITS 15012) Status Bar in Call Logging is not respecting settings when user logs back in.

RM 6045 – (ITS 28916) ATG is not updating Detail fields on Call Records.

RM 6095 – (ITS 29715) Call Logging crashes if trying to attach a global attachment that has a path greater than 112 characters.

RM 6102 – (ITS 28270) Populating a date field with @DateAdjust function using a custom calendar is does not work.

RM 6133 – (ITS 37334) Call Map re-appears even when it has been de-selected.

RM 6152 – (ITS 34184) Selecting a group from the Most Recently Used (MRU) list removes it from the MRU list.

RM 6155 – (ITS 35590) @If only analyzes the first character of a number field, not the whole number.

RM 6190 – (ITS 33734) “Is Empty” from simple search freezes Call Logging when used after opening a HEATBoard group.

RM 6247 – If a field is validated from the Configuration/Profile table on the CallLog table, selecting the drop down brings up a blank list. F9 displays the list correctly.

RM 6324 – (ITS 29264) Jump to Control action is not obeyed until the user clicks on the “Tables” tab.

RM 6338 – (ITS 28257) Token editor in the Email action of the Business Rule Editor blocks out entire message if it is opened once.

RM 6605 – (ITS 35324) Expired SLA Call Group is not pulling correct call records.

RM 9736 – Call Logging crashes when running an auto task that sends an email and the attachment path is filled and an @Prompt is used for the file name.

RM 14027 – All inserted fields for email need a value or else BPAM will not send the email.

RM 14852 - @AllResolved function will not work when used with the @If function.

RM 15987 – Auto closing issues from the HEATBoard will not write to the Activity log.

RM 17310 – The changes to made to the Blocks when inserting journals and assignments in not keeping the changes and defaults back to out of box configuration.

RM 21461 – ATG will not create a second attachment of same name if the file does not have an extension.

RM 21670 – If "Print When Printing Call Ticket" is not selected for CheckBox, you are unable to check the box on form.

RM 22542 – Running the Update Profile Employee task from call record, updates all the fields that have a default value.

RM 24902 – Broadcasts do not fire while the user is logged in.

RM 27398 – HFW functions are not installed properly.

RM 27403 – Infocenter size not saving if using a 800x600 display.

RM 30027 – Crystal Reports crashes HEAT when doing a refresh on the report.

RM 31847 – BPAM Service spkes processor and will not perform after first poll.

RM 31871 – Duration HFW function in Crystal Report causes Call Logging to crash.

RM 31875 – Error occurs on the BCGCPRO730.dll when launching Call Logging if only Call Logging and Alert Monitor are installed on the computer.

RM 33706 – Launching a Crystal Report from Call Logging causes Crystal Installer to launch, if HEAT was installed on a machine that has Crystal installed.

HEAT
License Limits and Definitions

- a. **Concurrent User:** A Concurrent User is a license that can be used by any Authorized User, but only by one at any given time.
- b. **Database:** A database is one set of data files.

These definitions are as of January 24, 2004.

You may use only one copy of the Licensed Software accessing one database. You are allowed only the number of Concurrent Users of the Licensed Software as shown in the corresponding purchase order or other order confirmation form. A remote user accessing the Licensed Software (via a web-enabled product) is considered to be utilizing one User license.

Should You exceed Your licensed number of Users, then You agree to pay the full list price for the excess Users and any additional Server or other product licenses required for such additional Users in accordance with FrontRange Solutions pricing program, as well as the full Maintenance and Support Fee related to these additional products.

Capitalized terms not defined herein shall have the meanings set forth in the applicable End-User License Agreement.