

HEAT[®] Service & Support [™]

Version 8.4.1

March, 2007
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 8.4.1

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1. What's New in HEAT Service & Support 8.4.1?

Snap to Guide when creating Edit Sets

The Set to Guide feature makes it easier to align labels, text boxes, and other form controls when designing forms in the HEAT Administrator Tool.

XP Style Command Button Option

When placing command buttons on forms, users now have the option to style the button to a Windows XP style. This is done through the properties of the Command Button.

Improved Tool Tips

Tool tips have been improved to provide better direction to new users.

2. Application Notes

Note to Users with HEAT Asset Tracker

Once upgraded to HEAT Service & Support 8.4.1, HEAT Archive Files will no longer be able to include the HEAT Asset Tracker tables. FrontRange Solutions recommends using the database tools to perform back-ups. This issue will be resolved with the release of HEAT Asset Tracker 8.4.1.

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 11 Runtime requires .NET 1.1 for installation. If users attempt to install HEAT 8.4 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 8.4 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 8.4.1 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, and Windows Vista.

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.

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.

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™ 8.4.1

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 8.3, HEAT Self Service to HEAT Self Service 8.4.1, and HEAT Link to LDAP to HEAT Link to LDAP 8.4.1.

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

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 8.4.1 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.

Installing on Windows® Vista™

The following must be done before attempting to install HEAT on Windows Vista:

- .Net 1.1 has been installed.
- The properties of the HEAT setup.exe have been configured to run in Windows XP SP2 mode.

Once the above is accomplished, HEAT should install properly.

4. Bug Fixes and Enhancements included in HEAT 8.4.1

RM 6281 – (ITS 34632) Removing an action from a follow-up within a BPAM rule does not remove the follow-up action.

RM 6282 – (ITS 35480) BPAM will not send an attachment or write a file using a mapped drive when running on Windows XP

RM 6594 – (ITS 38092) An Auto Task that changes the CustType and CustID will error when executed through BPAM.

RM 8462 – (ITS 38314) An Auto Task that is set to close the record does not stamp the ClosedDate, ClosedBy, or ClosedTime fields.

RM 15776 – When using screen reading software, the screen reading software must be able to announce the Menu Item when executed from a keyboard short-cut.

RM 16230 - @Sum AutoTask function will not work on its own.

RM 21211 – Adding a 16x16 bmp when using MSSQL will cause a “String data right truncation” error.

RM 28187 – Auto Tasks are populating date fields with a year of 1970 when executed from BPAM.

RM 28690 – Duration calculation in reports calculates values differently when the report is run via HEAT versus when run through Crystal.

RM 31812 – User receives ODBC error when trying to create HEAT Asset Tracker tables through the HEAT Administrator.

RM 42295 – Agent Dashboard used with IPCC is reset after upgrade to HEAT 8.4.

RM 42378 - @Team function within an Auto Task will crash Call Logging, if using long team names.

RM 42893 – Alert Monitor Grid Settings do not save the size settings after saving the Alert Definition.

RM 43054 – Alert Monitor will not save the Sort Option upon exit.

RM 43654 – Call Logging crashes after deleting an item from Table Maintenance when using Access.

RM 44075 – BPAM Service produces a 1067 Error when starting service against Microsoft Access Database when the database is located on a shared location or mapped drive.

RM 44260 – ATG Service does not run on Windows Server 2004 when it queries an Access database located on a network drive.

RM 44527 – User receives 37000 SQL error when the user selects a Call Type with an apostrophe.

RM 44781 – Utilizing multiple print queues under a HEAT Print Information Auto Task Action will not print to the correct print tray that was configured in the Auto Task.

RM 44920 – Jump to Control action can not place cursor into Subset form.

RM 45391 – Call Record Browse is causing Call Logging to lock up when utilizing with a large set of Call Records.

RM 45683 – BPAM is unable to use SQL Express 2005 as the local database.

RM 45769 – Call Record Browse does not open desired record when executed.

RM 46425 – ATG processes only one e-mail per poll.

RM 46496 – Call Logging causes SQL Locking when viewing Assignments or Journals.

RM 48333 – Call Record Browse will return all values when executed from a custom Call Group that does not contain reference to a CallLog field.

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.

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