

HEAT[®] Service & Support [™]

Version 8.3.8

April, 2006
Readme

HEAT Service & Support 8.3.8 specifically addresses issues in the installer of 8.3.7. Therefore, users already using HEAT 8.3.7 do not need to upgrade to Version 8.3.8. Users wishing to upgrade from version 8.3.7 are required to remove that version of HEAT to install version 8.3.8.

See the Application Notes for special notes when installing / upgrading the HEAT Self Service server.

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 8.3?

New HEAT Homepage Capability

HEAT now has the capability for a user to set a URL as a homepage, which can then be accessed by the user, without ever leaving the customer information, or Call Logging. This feature is accessed by setting the URL via the HEATIntegrationBO.xml und the HEATHomePage section on GlobalSettings.

IT Service Management Module Integration Enhancements

HEAT 8.3 includes enhances to the usability when integrating to the ITIL based Service Management modules to include:

- Visual indicators on the Call Record to let the user know when a Problem, Change, Release or Configuration Item is linked
- Improved placement of the Save button when editing or creating a Problem or Change record
- Prompts to let the user know that a Problem, Change, Release, or Configuration Item has been successfully linked to a Call Record.

MobileHEAT Performance Enhanced

MobileHEAT has been enhanced to perform better when used as a disconnected client. HEAT will now only transfer changed Call Records, Profile Records, and Configuration records since the last synchronization date versus the whole database.

MobileHEAT MSDE Compatibility

MobileHEAT is now able to utilize MSDE as its database. Previous versions allowed only the use of Access.

Ability to Designate Fields that are Printed

Administrators can now configure what fields are printed when a user selects File>>Print>>Print Call Ticket.

2. Application Notes

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

Due to the versioning change of HEAT Service & Support, a number of HEAT Self Service Files have been updated. These files are located on the root of the installer in a folder HSS. The following files from the HSS folder on the installer must be manually copied to the HEAT directory on the HSS Server: CSSAdmin.exe, CSSMailService.exe, CSSApi.dll, CSSCoolCache.dll.

1. Stop IIS on the HEAT Self Service Server.
2. Locate the above files on the HEAT Self Service Server, and rename those files to a .old extension.
3. Copy the new files identified above from the HSS folder of the installer, and copy to the HEAT folder on the HEAT Self Service Server.
4. Start IIS.

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 8.3.8 System Requirements

HEAT 8.3.8 operates in Microsoft® Windows® 98SE, ME, Windows® NT® 4.0 Workstation (SP6a) or Server (SP6a), or Windows® 2000 (SP4), Windows® XP (SP2), Windows Server™ 2003.

Please refer to the HEAT 8.30 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.

True Color Support

HEAT Service & Support 8.3.8 will only support True Color display settings. Using any other display setting may cause toolbar icons to disable.

Previewing HEAT 8.3.x

If you are an existing HEAT customer and would like to preview the new HEAT 8.30 features, choose the Custom Setup when installing. You will have the option to install both the Quick Start Wizard Starter database and a HEAT 8.3.x 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.

Notes on Images

When images are placed or removed from forms, they are placed on forms in real time, before clicking Ok, Cancel, or committing an Edit Set.

HEAT 8.3.8 utilizes images that are 45k in size or smaller.

When utilizing images, HEAT uses pixel 1,1 for the transparency color. Meaning, the color at pixel 1,1 will be changed throughout the image to the background color of the form the image is placed on.

Enabling Profile or Configuration Records for Escalation in BPAM

HEAT 8.3.8 requires users to commit an edit set to enable the tables for escalation:

1. Open an Edit Set
2. Open the Config table
3. Click the Business Rules Enabled button
4. Close the table.
5. Open the Profile table
6. Click the Business Rules Enabled button
7. Commit the Edit set

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.

Answer Wizard Reports using HEAT Calendar

Due to a bug in the Crystal API, the following steps must be taken to run an Answer Wizard Report that utilizes the HEAT Calendar:

1. After selecting desired options for Report and on the Report Print Options Screen, select the Print Option, then Click Next.
2. You will be prompted with a Database Password Screen Fill in the Database information, then click Ok.
3. Click Back.
4. Click Next, Re-enter the Database information, then Click OK.

The Report will now run appropriately.

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

Note to Novell Users

HEAT 8.3.8 is a 32-bit product that uses long filenames in several instances. Please verify that long filename support has been enabled on your Novell server before attempting a HEAT 8.3.8 installation. Please refer to the documents 2929574, 2934097, and 2912726 on the Novell Support pages at <http://support.novell.com/search/>.

Note to Windows 98 Users

Crystal 9.0 Runtime requires .NET 1.1 for installation. If users attempt to install HEAT 8.3.8 using the default installation, or trying to install the HFW functions without .NET installed, the installation will error and not complete. To install HEAT and the HFW functions successfully, .NET must be installed.

GroupWise

HEAT 8.3.8 is compatible with GroupWise 5.5 and 6.0.

MobileHEAT

Current users of MobileHEAT will need to delete their MobileHEAT database before upgrading HEAT to a newer version, as well as, enabling the HEAT Configuration and Profile tables for Business Rules. Since the upgrade process changes the version number of the host database, an older version of MobileHEAT is no longer compatible with the host.

Note: It is recommended that users always sync Profile and Config records. If the user syncs only call records, added or changed Profiles and Config records will not sync to the client the next time the user chooses to sync the Profile and Config data.

Steps for Setting up MobileHEAT (The following steps are required due to changes in the synchronization process of MobileHEAT. MobileHEAT will now only send new and changed Profile and Configuration records to the remote sites, instead of the entire tables)

1. After Deleting the MobileHEAT database on the client, and upgrading the host HEAT database (to HEAT 8.3.8, if upgrading from HEAT 8.01 or later, a database upgrade is not required) on the server, log into the HEAT Administrator Module, ensuring that you select the host HEAT data source.
2. Select File>>New Edit Set and select Yes to Edit Set confirmation dialogue
3. Locate the Config table in the Tables list, and highlight it by clicking on Config once.
4. Click the Open Table button.
5. Notice the Business Rules Enabled Button on the toolbar. Click the button if there is NOT a green “x” in the box. If there is a green “X” in the box, proceed to step 6. Clicking the button will explain that “Enabling business rules will add three fields (DTLastMod, RecvdDate, and RecvdTime) to this table. Proceed?”. Select Yes.
6. Close the Config table and locate the Profile table in the Tables list. Highlight it by clicking on Profile once.
7. Click the Open Table button.
8. Notice the Business Rules Enabled Button on the toolbar. Click the button if there is NOT a green “x” in the box. If there is a green “X” in the box, proceed to step 8a. Clicking the button will explain that “Enabling business rules will add three fields (DTLastMod, RecvdDate, and RecvdTime) to this table. Proceed?”. Select Yes.
- 8a. If Business Rules were already enabled for both the Config and Profile tables, there is no need to commit an Edit Set. You can move forward with replacing the MobileHEAT databases for the remote clients.
9. Close the Profile Table, and commit the Edit set.
10. Proceed with replacing the MobileHEAT databases on the remote clients.

These steps may need to be repeated for other tables in the database, if they are not yet enabled for business rules.

Pager Integration

HEAT 8.3.8 integrates with MobileCHOICE WinBEEP 32 (www.mobilechoice.com). The link between HEAT and WinBEEP can be completed using the HEAT AutoTask function. See the HEAT Support page <http://support.frontrange.com> for Integration Notes.

3. Installing HEAT® Service & Support™ 8.3.8

NOTE: HEAT Systems utilizing HEAT Asset Tracker or HEAT Link to LDAP must also upgrade HEAT Asset Tracker to HEAT Asset Tracker Version 8.03 and HEAT Link to LDAP to HEAT Link to LDAP 8.3.7.

The HEAT 8.3.8 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 8.3.8 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 8.3.8 CD.

Note: Upgrading to HEAT 8.3.8 from HEAT 8.0 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 included in HEAT 8.3.8

HEAT 8.3.8 addresses the following installer issues occurring with 8.3.7:

RM 31874 – Error occurs on the SS32D25.dll when launching Call Logging when HEAT was installed from the Admin image.

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.

5. Bug Fixes and Enhancements included in HEAT 8.3.7

ITS 11308 – RM 5510 Forwarding of SupportMail only begins after saving settings and restarting of Alert Monitor.

ITS 26472 – RM 5555 HEAT Administrator shuts down when the 1000th record is exported to the commit.000 file if the validation table name is greater than 15 characters.

ITS 36845 – RM 5664 The drop down menu does not obey the CustType Validation from a field on profile.

ITS 34406 – RM 5720 Call Locking is not noting the user who locked the call.

ITS 7939 – RM 5839 If “Business Rules Enabled” is checked on the Journal table, the Auto Ticket Generator Update Ticket action will wipe out ALL Journal text that was manually entered, and only leaving Quick Journal information.

ITS 35700 – RM 5986 Changes to Attachments on Call Records do not save.

ITS 29742 – RM 6096 Attachments are not written to the HEATGen table until the user leaves the call record

ITS 34740 – RM 6200 Certain types of AutoTasks will prompt for required fields on the Detail screen, even if there isn't a Detail associated with the specific Call Type.

RM 16230 @Sum AutoTask function will not work with having an update action on the call record to save the call first.

RM 16400 Time Zone offset does not allow users to browse assignments via the Call Map. It prevents users from toggling between them while on the tab.

RM 17108 When a user tries to view the tickets tab through GoldMine while running through an iGoldMine client, the user receives an error that “iHEAT has not been licensed for this database.

RM 17915 Users receive a rights error when executing a command button from a Profile form.

RM 10833 – ITS 36611 Users no longer have to log out of HEAT for new SMTP / POP 3 settings to take affect.

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.

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