

HEAT® Self Service Version 8.0

November 2003

Readme

Please read this entire document. It contains important information regarding HEAT Self Service (HSS) 8.0. **It is critical that you read Sections 1 and 3 before installing HEAT Self Service 8.0.**

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1. Application Notes

WARNING: If you are upgrading a current version of HEAT Self Service that is a version prior to 6.4, you must enter new customer login information for all HEAT Self Service users. There is a Wizard included with this CD that will transfer the required information from your HEAT Profile table to the correct table in the HEAT database. Run HEATSelfServiceCustLoginUpdate.exe (see information, below) from the directory where you installed HEAT Self Service. The default location for this file is HEAT\HEATSelfService directory.

WARNING: It is highly recommended for SECURITY purposes that the admin.asp file be made entirely inaccessible to all but the Windows NT or 2000 administrator after completing customization HEAT Self Service.

Important: If any modifications have been made to HEAT Self Service web files, it is important that these files be renamed before uninstalling HEAT Self Service. These files can include Division, .asp, and .lang files.

NOTE: If uninstalling HEAT 6.4, HEAT Self Service 6.4 must be uninstalled first.

HEAT and GOLDMINE CORPORATE EDITION Integration

IMPORTANT: When GOLDMINE CORPORATE EDITION and HEAT are integrated, HSS uses the Contact1 table to validate and autofill Subset fields on the HSS New Issue page. When a user validates from these fields, a list of other companies and contacts is exposed. It is possible to create a validation constraint to prevent this. The information in the Help File for this subject is incorrect. **Please see the printed HSS Administrator Guide for complete information on creating a GOLDMINE CORPORATE EDITION view for HEAT Self Service.**

GOLDMINE CORPORATE EDITION Contacts Email Address Field

If your HEAT or HEAT Power Desk installation is integrated with GoldMine Sales and Marketing (GOLDMINE CORPORATE EDITION), it is not possible to modify an existing Contact email address from HEAT, HEAT Power Desk or HEAT Self Service. To modify an existing Contact email address, select the Contact in GOLDMINE CORPORATE EDITION and modify the email address. The modified entry will be available in HEAT Self Service.

HEATSelfServiceCustLoginUpdate.exe

Included with HEAT Self Service is the HEATSelfServiceCustLoginUpdate.exe. Use this executable if you currently have HEAT Self Service login information in your HEAT Profile records and do not wish to recreate this login information manually. Running the executable will copy the information from your Profile records to new records in the HEATCAI table, which is now used to hold login information for your HEAT Self Service users.

The Profile information is copied to the HEATCAI table by Customer Type. The executable must be run once for each Customer Type used with HEAT Self Service. To change the Customer Type, click on the Customer Type drop down.

Attachments

HEAT Self Service allows attachments to be added to submitted Call Tickets. As with all data transmitted across the Internet or Intranet, serious consideration should be given to the content of these attachments and the security risks involved. HEAT Self Service does not scan attachment contents for excessive size or damaging content.

If HEAT Has Unified Login Activated

HEAT Self Service logs in to the HEAT database by use of the "anonymous" user id. To allow the anonymous Web based login to work, it is necessary to make the new HEAT Unified Login option not required. From HEAT Administrator>>Security>>Unified Login, deselect the item Require Unified Login. Deselecting this checkbox will allow your HSS users necessary access to the HEAT database. This has no effect on the security of your website or HEAT database.

Email

HEAT products make extensive use of email. We recommend that you employ virus detection throughout your system. FrontRange Solutions. will not be responsible for problems caused by viruses.

Due to limitations in older POP3 servers and in some MAPI email programs, there is a maximum character limitation per line. In some messages, this can cause a <CR> to be present in the issue tracking number in return email messages. For instance, in an issue confirmation email to the customer, the link back to the issue may appear like this, "<http://CC-110-2KS/HEATSelfService/default/en-us/callticket.asp?CallID=00000068>", where the issue number is 00000068.

If you have configured HSS to work with an email program that contains this restriction, it is recommended that you place the following text in the body of the message:

"Due to line length limitations, the link represented below may be broken in two or three places. Consequently, clicking on the link may not work. To make the link work, ensure that all characters are typed into the address line/bar of your browser."

External Table Limitation

As with HEAT and HEAT PowerDesk, it is not possible to create or modify External Profiles.

HSS System Administrator-Defined New Issues Form Page

This option is for ADVANCED HSS USERS ONLY:

Do not attempt to use this option unless you fully understand HEAT Edit Sets, HTML, and the interaction between them within HSS. Selecting the option labeled "**Enable Call Ticket Forms Not Defined By HEAT Edit Set**" tells HSS to create all new issues using the user-defined/edited files named SimpleHTMLCallTicket.html and SimpleHTMLCallTicket.lang, located in the desired theme's Division subdirectory. If the changes are desired for more than one theme, the files must be propagated to each theme's Division subdirectory.

Selecting this option means that the form defined for the CallLog table using the HEAT Administrator will not be shown to the user. Instead, the System Administrator-Defined New Issue Form Page will be activated allowing a higher degree of customization than the HEAT form. Remember that any fields in the CallLog table that are marked as required are enforced, and a failure to supply these required fields from the simple HTML form ticket will result in no ticket being logged from HSS.

Multiple Call Groups

It is possible to set up multiple call groups for HEAT Self Service. This is not set up as a default selection in HSS.

Instructions to Enable Multiple Call Groups in HSS:

The instructions to enable the multiple call group feature are actually contained within the HOME.ASP file. In the file HOME.ASP, for each desired theme and language, find the following code, located near the bottom of the file:

```
<!-- To disable multiple call groups, comment the following code-->
<SCRIPT LANGUAGE="JavaScript">
  if( HasRights( CssRights.CallRecord, CssRights.ViewFlag ) )
  {
    document.writeln( "<%=CssLocale.GetText("<P>Below is a list of issues(...etc.
cut for brevity)
  }
</SCRIPT>

<%=CGen.writeListCallTicket()%>

<!--stop here for disabling multiple call groups -->

<!--To enable multiple call groups, uncomment the following code
<%=CGen.writeCallGroups()%>
<!--stop here for multiple call groups-->
```

Step 1: Edit the file HOME.ASP with a suitable editor.

Step 2: Disable the upper portion between the two marker comments by commenting it out.

Step 3: Enable the lower line between the two marker comments by un-commenting.

Step 4: Save the file.

Call History Setup

The "primary" field that is selected for the Journal List and Call Ticket List, i.e. the item that is at the top of the list on those tabs in the preferences of the HSS Configuration Tool, must contain data in the HEAT, HPD, or GOLDMINE CORPORATE EDITION database. If this field does not contain data, no ticket will be entered from HSS.

Required Components:

- Operating System:
 - Microsoft NT 4.0 server, Service Pack 6a
 - Microsoft 2000 Server Service Pack 3
 - Microsoft Server 2003
- Internet Browser
 - MS Internet Explorer 5.5 or 6.0
 - Netscape 4.7 or 6.0
- Microsoft IIS server 4.0, 5.0, or 6.0
- 100 MB Network Connection (Recommended: Load Balancing Network Cards)
- 500 Mhz processor, 512 MB (Minimum requirements)

IMPORTANT: HEAT Self Service is unable to prevent large documents from being attached or transferred. If you have elected to allow HEAT Self Service users to create file attachments to Issue Tickets, it is recommended that your web server contain dual processors to prevent long wait times. It is also recommended that file storage be appropriately sized to allow for attachments to be stored.

Workstation Requirements:

- Any OS that supports Microsoft Internet Explorer or Netscape Communicator
 - MS Internet Explorer 5.5 or 6.0
 - Netscape 4.7 or 6.0

2. Installing HEAT Self Service 8.0

WARNING: If you are upgrading a current version of HEAT Self Service that is a version prior to 6.4, you must enter new customer login information for all HEAT Self Service users. There is a Wizard included on the HEAT Self Service CD that will transfer the required information from your Profile table to the correct table in the HEAT database. Run HEAT Self ServiceCustLoginUpdate.exe from the directory where you installed HEAT Self Service. The default location is the HEATSelfService directory.

Note: Before installing HEAT Self Service 8.0 or upgrading your current HEAT Self Service to this version, you must first install HEAT 8.0 or HEAT Power Desk 8.0 on the same server that will contain HEAT Self Service. This may be accomplished by performing a Recommended Installation from the HEAT 8.0 CD, or by performing a workstation setup from the HEAT server.

Post-Installation changes to the name and/or location of the HEAT Self Service web site

When making post-installation changes to the name of the physical directory that contain the HEAT Self Service web site, it is necessary to make changes to an include directive that is located in "admin.asp", a file which is located in the HEAT Self Service Administrator's web site. The HEAT Self Service Administrator's web site is a virtual directory that can be found underneath the HEAT Self Service web site in the Internet Information Services control tool.

Following installation of HEAT Self Service, the include directive typically looks like this:

```
<!-- #include file="../../../heatselfservice/common/header.html" -->
```

This directive allows the HEAT Self Service Administrator's site to display and edit the contents of the HTML header file that appears at the top of all HEAT Self Service web site pages. The include directive that is shown above looks into a physical directory named "heatselfservice" for the header file. If this directory name is changed at any point after a successful HEAT Self Service installation, then this include directive must also be changed to match the new name of

the physical directory that contains the HEAT Self Service web site. This include directive appears twice in the file "admin.asp" so both instances of it must be updated.

Security Changes Needed for HSS Operation

Administrators will need to make changes to the Windows security in order for HSS to operate. The changes needed are:

1. The iUSER account must have "List Folder Contents" rights on the root drive where HSS is installed.
2. The iUSER account must have "Read & Execute" rights on the HEAT folder where HSS is installed.
3. The iUSER account must have "Read, Write, and Execute Rights to the HEAT/Data folder ONLY if using the Access database stored in that directory.

Changes Needed to IIS if installing on Windows Server 2003

HSS requires changes to IIS 6.0 after installation to ensure proper operation on Windows Server 2003. The changes needed are:

1. Open Internet Information Services Manager.
2. Browse to Web Server Extensions.
3. Highlight Active Server Pages, then click Allow.
4. Browse to Web Site.
5. Right-Click on Web Site, then click Properties.
6. Select the Service tab
7. Check the Run WWW service in IIS 5.0 isolation mode option under the Isolation Mode section.
8. Browse to the HSS virtual directory
9. Right-click, then select Properties
10. In the Application Settings section of the Virtual Directory tab, Click Configuration.
11. Select the Options tab
12. Check Enable Parent Paths option.
13. Click OK.

Default Page for HSSAdmin Virtual directory

HSS installs the HSSAdmin Virtual directory under the HSS virtual directory. The default web page for this virtual directory is set to default.asp. The default web page must be changed to Admin.asp.

3. Miscellaneous Improvements

The following issues are addressed in HEAT Self Service version 8.0. In some cases, the function causing the issue was removed and is now performed in a different fashion.

25161 – When setting up a Knowledge Base, the system does not allow the user to save the settings.

28281 – HEAT should have the ability to automatically create HSS logins from Profile information. HEAT 8.0 now has an AutoTask action to create customer login information.

29092 – After activating multiple call group display, the More Issues link does not function correctly.

31609 – Link to Ticket is not bringing up correct ticket when using multiple call groups.

