Installation Guide

FrontRange
SOLUTIONS

HEAT
Service & Support ™
VERSION 8.0

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Contents

Introduction

Welcome to HEAT 8.0

Welcome to HEAT 8.0. HEAT is a fully customizable suite of modules that work together to provide a complete service and support solution for your Help Desk or Support Center. It provides all the tools you need to log and resolve calls, store information about your customers, track information on your organization's performance, and generate detailed reports.

HEAT contains the following core tools to help you work more productively.

- **Call Logging:** Call Logging provides all the tools you need to log, track, and resolve calls quickly and efficiently.

  Recommendation: Install Call Logging on all user computers.

- **Alert Monitor:** Alert Monitor is a notification tool that alerts you when you receive new HEAT messages, Assignments, or other conditions. You can even set up Alert Monitor to notify you while you are away from your desk.

  Recommendation: Install Alert Monitor on all user computers.

- **First Level Support (FLS):** FLS is a simple but powerful tool used to build and maintain knowledge bases. Whether purchased or custom built, FLS knowledge trees can provide answers to questions, solve problems, share knowledge, and document work flow.

  Recommendation: Install First Level Support on all user computers.

- **Manager's Console:** Manager's Console is a management tool that monitors the status of vital organizational processes.

  Recommendation: Install Manager's Console on managers' computers.

- **Answer Wizard:** Answer Wizard is a management reporting tool providing the ability to generate detailed reports about the status and trends of your company's issues.

  Recommendation: Install Answer Wizard on managers' computers.

- **Business Process Automation Module (BPAM):** BPAM is an automation tool that uses a service to monitor common problems or events based on the Business Rules you establish. BPAM then executes actions you define in order to resolve or escalate issues.

  Recommendation: Install BPAM on a dedicated Microsoft NT server or Windows 2000 computer.

- **Auto Ticket Generator (ATG):** ATG is an automation tool that automatically creates or updates Call Records from e-mail messages or text files. The ATG module also allows customers to perform information queries regarding their existing Call Records, and it allows users to transfer Call Records from one HEAT system to another.

  Recommendation: Install Auto Ticket Generator on a stand-alone computer.

- **Administrator:** Administrator is the pivotal tool for controlling your HEAT system. Designed for a system administrator, this module controls all aspects of security, defaults, database maintenance, customization, integrations, and so on for the entire HEAT suite.

  Recommendation: Install Administrator only on the system administrator's computer.

- **LoadDB Utility:** This utility lets you load your HEAT database into an existing ODBC data source.

  Recommendation: Install LoadDB Utility only on the system administrator's computer.

Note: The HEAT 8.0 installation CD contains the core HEAT modules and utilities; add-on modules such as iHEAT, HEAT Asset Tracker, and HEAT Self Service are installed from separate CDs and have their own documentation. The core modules installed depend upon the Installation Type you select. For more information on Installation Types, see "Installation Basics."

About this Guide

This guide describes the basic components and steps for installing HEAT 8.0 on your network and workstations.

Audience and Expertise

The material assumes the administrator has already installed and is familiar with HEAT's numerous modules. It also assumes the user has a basic understanding of databases and the Microsoft Windows operating system.

Document Conventions

This document uses the following terms and syntax when explaining steps and procedures:

- Menu bar commands and the corresponding menu item are presented as **File>>Print**. This means you should select the word **File** on the menu bar, and then click **Print** in the drop-down menu.

- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold text when they are the result of an action. For example: "Click **OK**. The **Select a Data Source** dialog box appears." Bold text may also be used if needed for emphasis on the first mention of that item.

- Command buttons you click on-screen are referenced in bold text or pictured as they actually appear.

  Example: **OK** or [　OK　]

- Tips are presented in the margins to provide users with alternative procedures or with suggestions for using the feature.

- Notes are presented with a line above and below the paragraph; the word **Note** always appears in bold text. Notes provide information to supplement or emphasize information in the text.

- Important Notes are presented with a line above and below the paragraph; the word **IMPORTANT** is always capitalized and appears in bold text. Important notes provide information essential to the text.

- Cautions are presented with the word **CAUTION** in all capital letters and bold text. Cautions alert users that failure to read and use information provided may result in data loss.

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- Cross-references are presented with a book icon . Cross-references inform users that related or additional information is available in another topic or manual.

HEAT Resources

Manuals

HEAT offers the following manuals to help you get the information you need:

- **HEAT User Guide:** This guide provides an introduction to the main modules and features of the entire HEAT suite of products.

- **HEAT Administrator Guide:** This guide provides an introduction to the main concepts and features of HEAT administration.

- **HEAT Installation Guide:** This guide provides installation and setup instructions for core HEAT modules. Core HEAT modules include Call Logging, First Level Support, Alert Monitor, BPAM, Auto Ticket Generator, Manager's Tools, Answer Wizard, and Administrator.

- **iHEAT Getting Started Guide:** This guide provides installation, setup, and integration instructions for iHEAT.

- **HEAT Self Service Getting Started Guide:** This guide provides installation, setup, and integration instructions for HEAT Self Service.

- **HEAT Asset Tracker Getting Started Guide:** This guide provides installation, setup, and integration instructions for HEAT Asset Tracker.

- **HEAT Plus Knowledge Getting Started Guide:** This guide provides installation, setup, and integration instructions for HEAT Plus Knowledge.

- **HEAT Plus Call Center Installation Guide:** This guide provides installation and configuration instructions for HEAT Plus Call Center.

- **HEAT Plus Remote Support Suite Getting Started Guide:** This guide provides installation, setup, and integration instructions for HEAT Plus Remote Support Suite.

- **HEAT WebCenter Getting Started Guide:** This guide provides installation and configuration instructions for HEAT WebCenter.

IMPORTANT: Manuals applicable to the subject application are available in PDF format from the **Installation CD-ROM** or **NetUpdate download** or to maintenance customers on our support Web site at **support.frontrange.com**.

Online Help

FrontRange Solutions provides an extensive online Help system for most modules. This convenient feature allows you to access step-by-step instructions, overviews, checklists, tips, notes, definitions, dialog box descriptions, and reference information without having to look past your computer screen.

Two types of online Help are generally available. They are:

• **Module Help:** This Help describes how to use each module. Step-by-step instructions walk you through basic tasks while overviews, checklists, tutorials, and definitions explain general concepts and ideas.

• **Dialog Box Help:** This Help is context-sensitive and describes the purpose of a dialog box as well as the controls (text box, drop-down list, check box, and so on) found on the dialog box.

To Access Module Help

Choose commands from the **Help** menu located in the module's main menu bar.

To Access Dialog Box Help

Click the **Help** button located in the active dialog box or press **F1**.

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Installation Basics

Overview

Before you install HEAT 8.0, it is important to understand the basic requirements and components of the installation.

System Requirements

This section lists the baseline system requirements for successful installation and operation of HEAT 8.0.

IMPORTANT

- FrontRange Solutions recommends exclusively dedicating a server to the HEAT database in larger implementations. Please consult a HEAT Sales Analyst to determine the right configuration for your specific needs.
- If you intend to use a different version of the software listed, or need to make certain your version of software or software driver is compatible with your HEAT product, please use the HEAT Matrix in our knowledge base at **http://support.frontrange.com** (maintenance customers only).

Overall Requirements

Disk Space Requirements

• HEAT 8.0: 175 MB (full HEAT installation)

Database Management Software (DBMS)

• Microsoft Access 2000/2002

• Microsoft SQL Server 7.0 (SP3) or 2000 (SP2)

• Sybase Adaptive Server Anywhere 8.02

• Sybase Adaptive Server Studio 9.0

• Oracle 8.16 (using 8.16.6 driver) or 8.l7 (using 8.17.6 driver)

• Oracle 9.i (using 9.01.3 Client) or Oracle 9i Release 2 (using 9.2.0 driver)

Server Requirements

The following recommendations are presented for the HEAT database server:

• On average, HEAT 8.0 requires 2-3 MB of hard drive space for every 1,000 Call Records.

• All system requirements were developed using Microsoft SQL Server as the HEAT 8.0 database application.

• When using other database applications, contact the database vendor for recommendations.

Server Requirements			
System	**<500 MB**	**1-3 GB**	**>3 GB**
CPU	Pentium III	Dual Pentium III	Contact Technical Support
Speed	733 MHz	733 MHz	
RAM	512 MB	1 GB	

Additional Server Information

- Multiple network cards are required when using HEAT 8.0 with a high volume of concurrent users.

- We recommend that a server be dedicated to the HEAT database for larger implementations. Consult your HEAT Sales Analyst to determine specific needs.

Client Requirements

The following system recommendations are presented for user installations of the core HEAT modules (Administrator, Call Logging, Alert Monitor, Answer Wizard, and First Level Support). Additional requirements are presented for Business Process Automation Module (BPAM), Auto Ticket Generator, and Manager's Console installations.

Client Requirements		
System	**Minimum**	**Recommended**
CPU	Pentium 200 MHz	Pentium II / III+
RAM	32 MB	64 MB

Note: HEAT requires at least 32 MB RAM over and above the Microsoft requirements for the operating system.

HEAT Modules Client Operating Systems

- Microsoft Windows NT 4.0 Workstation (SP6a+)

- Microsoft Windows 2000 Professional (SP3+)

- Microsoft Windows 98 SE

- Windows XP (SP1a)

Business Process Automation Module

Business Process Automation Module (BPAM) Server Requirements		
No. of Rules	**System**	**RAM**
1–10	Pentium II 300	128+ MB
10+	Pentium II 500	256+ MB

Note: We recommend you run the Business Process Automation Module on a separate machine due to high CPU cycles required by the Business Rules Monitor.

BPAM Operating Systems

- Microsoft Windows NT 4.0 Workstation (SP6a+)
- Microsoft Windows 2000 Professional (SP3+)
- Windows XP (SP1a)

Auto Ticket Generator

Auto Ticket Generator Requirements		
E-Mail Traffic	**CPU**	**RAM**
Minimum (low volume)	Pentium 200	32+ MB
Maximum (recommended)	Pentium II/III+	64+ MB

Auto Ticket Generator Operating Systems

- Microsoft Windows NT 4.0 Workstation (SP6a+)
- Microsoft Windows 2000 Professional (SP3+)
- Microsoft Windows 98 SE
- Windows XP (SP1a)

Manager's Console

Manager's Console Requirements		
Update Frequency and Gauges	**CPU**	**RAM**
Minimum (low)	Pentium 200	32+ MB
Maximum (recommended)	Pentium II/III+	64+ MB

TCP/IP protocol is required for Manager's Console

Manager's Console Operating Systems

- Microsoft Windows NT 4.0 Workstation (SP6a+)
- Microsoft Windows 2000 Professional (SP3+)
- Microsoft Windows 98 SE
- Windows XP (SP1a)

Software Requirements

HEAT 8.0 requires a few additional software programs to run efficiently. These programs are part of the HEAT 8.0 installation and are installed either automatically or with prompting.

- **Microsoft Windows Installer Service:** Required to distribute HEAT 8.0 to workstations by way of a server. The HEAT Installation Wizard checks to see if this program is installed and installs it if it is not found. The installer prompts you to reboot your system if required.

- **Microsoft Data Access Components (MDAC) 2.5 and higher:** These drivers are required in order for HEAT to access its database. The HEAT Installation Wizard checks to see if these components are installed. If not installed, the wizard informs you that you must install them.

Note: If you are using Windows NT Workstation, you must install version 2.5 first, then upgrade to a higher version.

HEAT Installation Wizard

The HEAT Installation Wizard walks you through the installation process step by step. Windows and dialog boxes clearly outline important information, features, and directions.

To navigate through the HEAT Installation Wizard, simply follow the directions in the windows and dialog boxes. To cancel the installation and exit the wizard at any time, click **Cancel**.

Installation Types

Two installation types are available on the HEAT 8.0 CD. They are:

- **Administrative Installation:** This type of installation creates an image of the HEAT 8.0 installer (usually on a shared network drive) from which end users can install to their local workstations. An End-User installation run using an administrative image on a shared network drive is much faster than an End-User installation run from a CD. Running the End-User installation using an administrative image also simplifies future upgrades and patches.

    IMPORTANT: An Administrative installation makes an exact copy of the HEAT installer on the network location you specify.

- **End-User Installation:** This installs program files to an end user's workstation. (Users have the option of choosing either a Typical or Custom installation; see "Setup Types.") You can run this type of installation from either an administrative image on a shared network drive or from the HEAT 8.0 Installation CD.

Setup Types

Two setup types are available for End-User installations. They are:

- **Typical:** This type of setup installs HEAT's most common features: Call Logging, Alert Monitor, and First Level Support.

- **Custom:** This type of setup allows the user to select specific modules and features for installation. The default installation of HEAT 8.0 installs all features typical for a system administrator and/or manager. Additional tools such as Advanced HEAT Configuration and GoldMine Integration are also available.

IMPORTANT: Custom setups are recommended for advanced users only and usually are reserved for system administrators or computers dedicated to specific modules. For example, if a computer were dedicated to run the Business Process Automation Module (BPAM), users could run a Custom setup to install only BPAM on a particular computer.

Installation Checklists

Review the following checklists before installing HEAT. These checklists outline the basic steps for installing and running HEAT in an efficient manner.

Administrative Installation Checklist

❑ **Back up your HEAT database (upgrading customers only).** We recommend backing up your database before beginning any installation. This prevents the loss of valuable, company-specific information such as Customer Types, Call Types, fields, and so on.

❑ **Back up your BPAM files folder and Log files (upgrading BPAM customers only).** We recommend backing up your BPAM files folder and log files (usually stored with your HEAT executable) before beginning the installation. This prevents the loss of data and history.

❑ **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. You should also exit the Microsoft Office Shortcut Bar and stop all services.

❑ **Uninstall previous versions of HEAT.** Uninstall a previous version of HEAT using Add/Remove Programs on the Control Panel.

Note: We recommend using Add/Remove programs to uninstall HEAT; however, if you do not, HEAT automatically upgrades the program for you.

❑ **Install HEAT 8.0 to a shared network drive.** This installs an administrative image of HEAT to a shared location. The steps for an Administrative installation are discussed in detail in the "Installing HEAT" chapter.

IMPORTANT: You must have Microsoft Windows Installer Service installed on your server in order to distribute HEAT 8.0 to workstations by way of your server. If the HEAT installer does not find this program, it installs it. The installer prompts you for a reboot, if required.

❑ **License HEAT.** Licensing registers HEAT and its numerous modules. Licensing is conducted through the Administrator module.

📖 For more information on licensing, please see "Setting Security" in the HEAT Administrator online Help.

❑ **Configure your HEAT Database using Quick Start Wizard (new users only).** Quick Start Wizard is a tool that helps first time HEAT Administrators initially customize a database to meet a company's specific needs. The wizard helps create Call Types, Configurations Types, fields, themes, and so on.

📖 For more information on Quick Start Wizard, see the *HEAT Administrator Guide*.

Tips for Administrative Installations

❑ **Use the HEAT ODBC Wizard.** You can distribute your ODBC data source for use on an end user's machine by using the HEAT ODBC Wizard (located on the HEAT 8.0 Installation CD). To do this, launch HEAT ODBC Wizard and follow the directions to create an .ini file containing the ODBC data source information. You can then save the .ini file as HEATODBC.ini and place it in the administrative image directory. The data source then is created on your end-user's machine during the installation process (assuming the required ODBC drivers are already installed and configured). This procedure eliminates the need to manually create a data source on each workstation.

Note: The HEAT ODBC Wizard does not map drives or perform driver-specific configurations. If your data source requires any special system configuration, this should be resolved before you install HEAT.

📖 For more information on the HEAT ODBC Wizard, see Appendix A, "HEAT ODBC Wizard."

End-User Installation Checklist

❑ **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. You should also exit the Microsoft Office Shortcut Bar and stop all services.

❑ **Uninstall previous versions of HEAT.** Uninstall a previous version of HEAT using Add/Remove Programs on the Control Panel.

Note: We recommend using Add/Remove programs to uninstall HEAT; however, if you do not, HEAT automatically upgrades the program for you.

❑ **Install HEAT 8.0 to an end user's workstation.** The steps for an End-User installation are discussed in detail in the "Installing HEAT" chapter.

IMPORTANT: Microsoft Windows Installer Service and Microsoft Data Access Components 2.5 are required by HEAT 8.0. If you do not have these programs on the end user's workstation, the HEAT Installation Wizard informs you that they are missing.

Tips for End-User Installations

❑ **If the Microsoft Windows Installer Service is installed, you can install and configure HEAT by way of command-line options**. Only the local computer's administrator can install the Windows Installer Service (for Windows NT). It is installed by launching instmsiA.exe (for Windows 98) or instmsiW.exe (for Windows NT) from the HEAT CD or HEAT administrative image location. Windows 2000 comes with the Windows Installer Service pre-installed.

📖 For more information on installing using command line options, see Appendix C, "Command-Line Options."

CHAPTER TWO

2

Installing HEAT 8.0

Overview

This chapter contains step-by-step instructions for running:

- Administrative installations
- End-User installations

Note: Before beginning an installation, please read Chapter 1, "Installation Basics."

Administrative Installations

An Administrative installation creates an image of the HEAT installer to a common location (usually a shared network drive). From here, users can install HEAT to their local workstations.

Note: If there is only one computer on which you'll be installing HEAT, an administrative image is not required.

An Administrative installation is conducted from the HEAT 8.0 CD-ROM. Leave the CD-ROM in your drive until the installation is complete. Before starting the installation, exit any programs running on your system.

For more information on Administrative installations, see Chapter 1, "Installation Basics."

To Run an Administrative Installation

1. Insert the HEAT 8.0 Installation CD into your CD-ROM drive.

   Note: The HEAT Installation CD is set up to autorun when inserted into your CD-ROM drive. If autorun is not enabled, select Run from the Start button on the Windows taskbar, and then type: x\:setup.exe (where "x" is the letter of your CD-ROM drive).

   The **Choose Installation Type** dialog box appears.
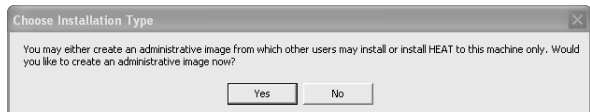
2. Click **Yes** to run an Administrative installation. The Installation Wizard prepares to install HEAT.

When the setup is ready, the **Welcome to the HEAT Installation** dialog box appears.
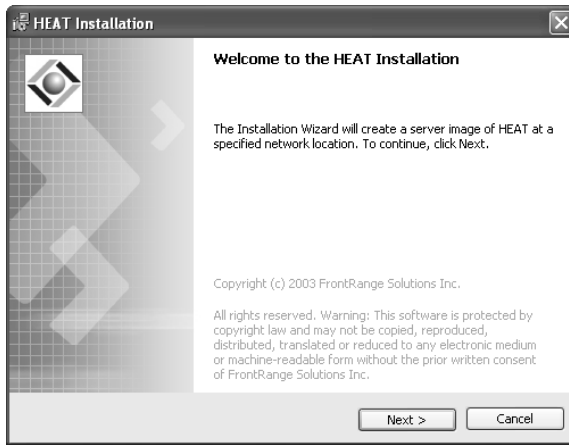
3. Read the installation information in the wizard window to verify that it is an Administrative installation (server image), and then click **Next**.

   The **End-User License Agreement** dialog box appears.

4. Review the End-User License Agreement (EULA). If you agree to the terms, select **I accept the terms of the above license agreement**. You must also indicate your status and whether you have read the agreement by selecting **I am an authorized agent and/or representative of the customer/end**

user and I have read the terms and conditions stated above. Click **Next**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms of the above license agreement**. Then click **Cancel** to exit the installation.

The **Choose Database Platform** dialog box appears.
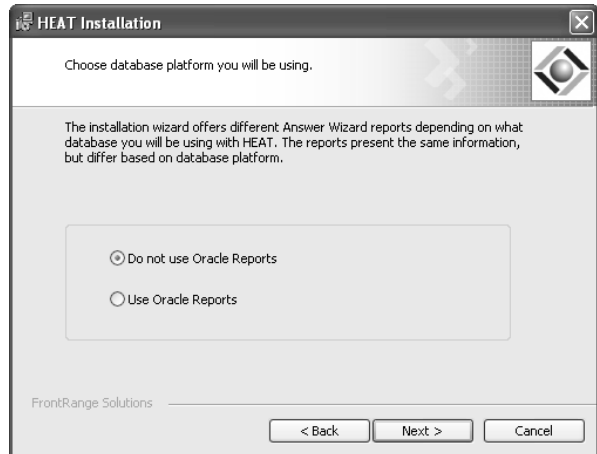
5. If you are using an Oracle database, select **Use Oracle Reports**; otherwise, accept the default. Click **Next**.

   The **Network Location** dialog box appears.
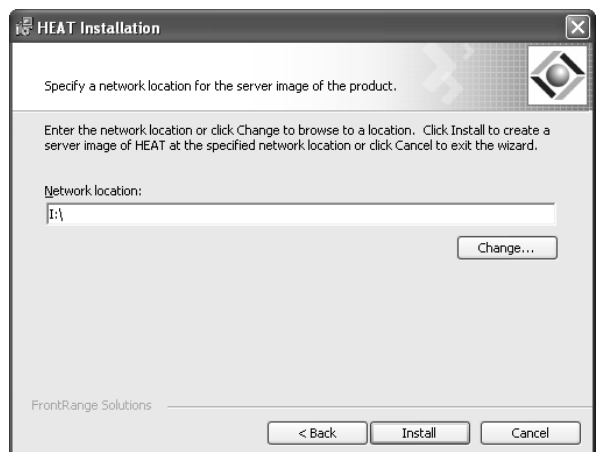
6. Type a path to the network location where you want HEAT installed or click **Change** to navigate to a location.

7. After you have selected a location, click **Install** to begin copying the program files.

   After the Installation Wizard installs the administrative image of HEAT, the **Installation Wizard Completed** dialog box appears.
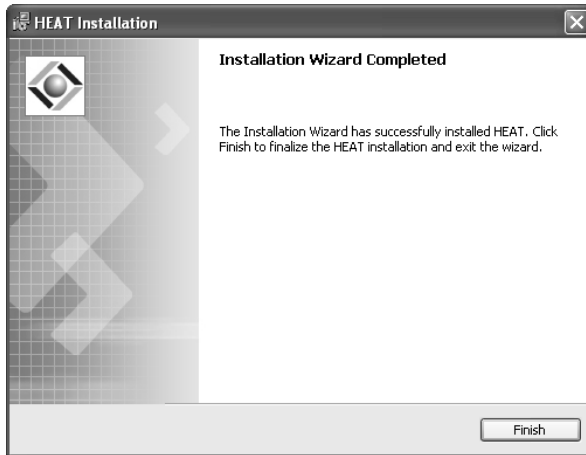
8. Click **Finish** to exit the HEAT Installation Wizard.

CONGRATULATIONS!The HEAT 8.0 Administrative installation is complete. You can now conduct End-User installations directly from the administrative image on the network location.

End-User Installations

This type of installation installs program files to an end user's workstation. You can run an End-User installation either from an administrative image on a shared network drive or from the HEAT 8.0 Installation CD.

IMPORTANT: We recommend running an End-User installation using an administrative image; installations are much faster, and future upgrades and patches are simplified.

For more information on End-User installations, see Chapter 1, "Installation Basics."

To Run an End-User Installation from an Administrative Image

1. Locate and double-click the **HEAT setup.exe**. This file is located on the shared network drive where the administrative image was installed (for example, **I:\Heat**). The Installation Wizard prepares to install HEAT.

   Note: To run an installation from the HEAT 8.0 Installation CD, insert the CD into your CD-ROM drive. The CD is set up to autorun. If autorun is not enabled, select Run from the Start button on the Windows taskbar, and then type: x:\setup.exe (where "x" is the letter of your CD-ROM drive). Be sure to select No when asked if you want to install an administrative image.

When the setup is ready, the **Welcome to the Installation Wizard for HEAT** dialog box appears.

2. Review the installation information in the wizard window to verify that it is an End-User installation (installs HEAT on your computer) and then click **Next**.

IMPORTANT: If you are installing HEAT from the Installation CD, the **End-User License Agreement (EULA)** dialog box appears where you must select **I accept the terms of the above license agreement.** You must also indicate your status and whether you have read the agreement by selecting I **am an authorized agent and/or representative of the customer/end user and I have read the terms and conditions stated above**. Then, click **Next**. If you are installing from an administrative image, the dialog box does not appear, as the EULA was accepted during the Administrative installation.

The **Setup Type** dialog box appears.
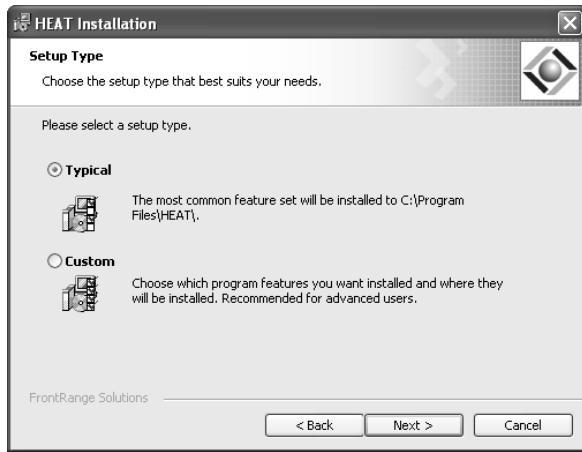
3. Choose a Setup Type and then click **Next**. You can choose from the following options:

   • **Typical:** This type of setup installs HEAT's most common features: Call Logging, Alert Monitor, and First Level Support. HEAT program files are installed to the HEAT subdirectory of the folder Windows identifies as the "Program Files" directory (for example, C:\Program Files\HEAT) unless otherwise specified in the Destination Folder dialog box.

   • **Custom:** This type of setup allows the user to select specific program features for installation.

📖 For detailed information on running a Custom setup, see Appendix B, "Custom Setups."

IMPORTANT: Custom setups are recommended for advanced users only. Custom setups usually are reserved for system administrators or computers dedicated to specific modules. For example, if a computer were dedicated to run Business Process Automation, users could run a custom setup to install only Business Process Automation to a particular computer.

The **Destination Folder** dialog box appears.
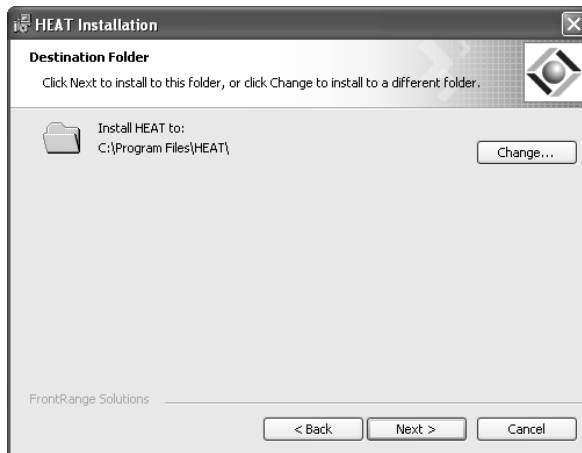
4. Select the default installation location for HEAT or click **Change** to navigate to a new location. Then, click **Next**.

   The **Ready to Install the Program** dialog box appears.
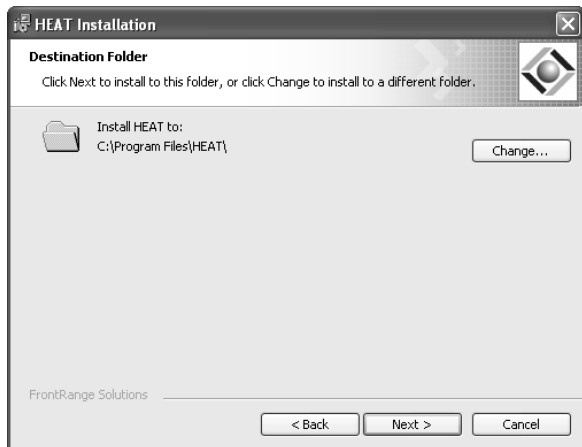
5. Click **Install** to begin installing HEAT.

After the Installation Wizard installs HEAT, the **Installation Wizard Completed** dialog box appears.
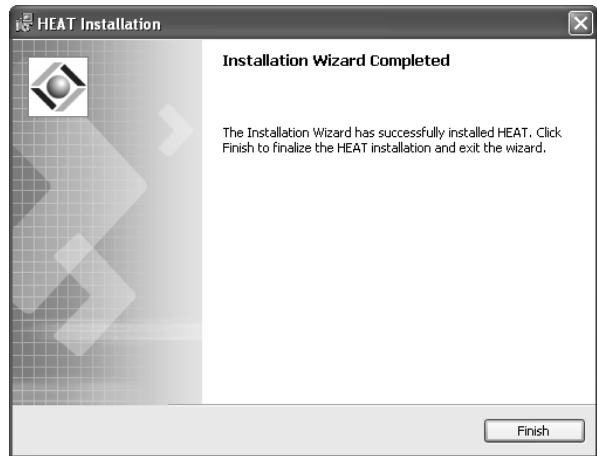
6. Click **Finish** to exit the HEAT Installation Wizard.

CONGRATULATIONS!The HEAT 8.0 End-User installation is complete. You can now repeat this procedure for each end-user workstation on which you want to install HEAT.

APPENDIX

a

HEAT ODBC Wizard

Overview

The HEAT ODBC Wizard can do two things. It can:

• Create .ini files based on existing data sources.

• Configure data sources based on existing .ini files.

This allows system administrators to distribute data sources with the administrative image so they can be used on an end user's computer. This procedure eliminates the need to manually create a data source on each workstation.

How HEAT ODBC Wizard Works

HEAT ODBC Wizard performs one of two functions: it configures data sources from an existing .ini file or it writes an .ini file based on existing data sources. You can then save the .ini file as HEATODBC.ini and place it in the administrative image directory. The data source can then be created on your end user's computer during the installation process (assuming the required ODBC drivers are already installed and configured).

You can accomplish these functions by either using command-line options or a dialog box interface. (The command-line interface can only read .ini files.)

ODBC Wizard offers a command-line interface for reading an existing .ini file and configuring a data source. This provides the administrator with a convenient way to run ODBC Wizard as part of a login script.

To use the command-line option, launch the wizard with the name of the file to be read as a parameter.

- **C:>run [path]\ODBCWizard.exe [path]\my.ini:**
  Reads an existing file and creates a logon
  [drive]\TempFolder\HEAT_ ODBC_Wizard.log.

  or

- **C:>run [path]\ODBCWizard.exe [path]\HEAT_ ODBC.ini-1[anypath]\anyFilName.log:** Reads an existing .ini file and creates the named logon anyPath\anyFileName.log.

Dialog-Based Interface

To Create an .ini File Based on an Existing Data Source

1. Double-click **ODBCWizard.exe**.

   The **Start** dialog box appears.
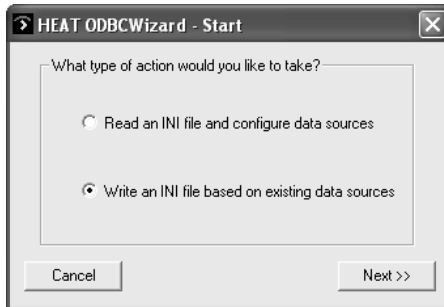
2. Select the **Write an INI file based on existing data sources** option and then click **Next**.

   The **Choose INI to Write** dialog box appears.

3. In the **enter path\filename** text box, type the location\file name of the .ini file you want to create or click **Browse** to navigate to a location. By default, the .ini file name written is HEAT_ODBC.ini.

   Note: ODBC Wizard does not overwrite an existing file. If you choose a filename that is not unique, ODBC Wizard displays a warning message.

4. Click **Next**.

The **Choose DSNs** dialog box appears listing all data sources installed on the local computer.
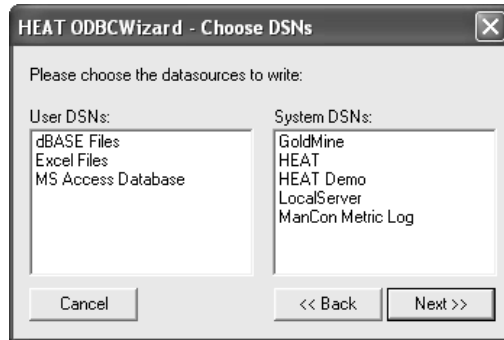
5. Select the data source you want to write to the specified .ini file and then click **Next**. The HEAT ODBC Wizard creates an .ini file based on the data source you selected.

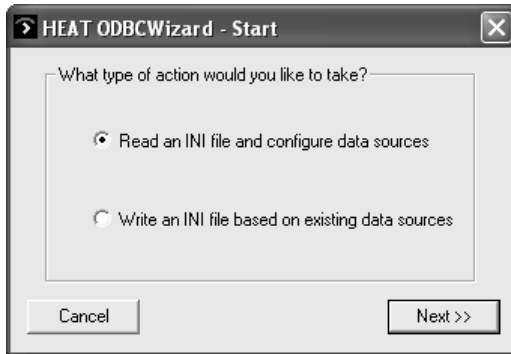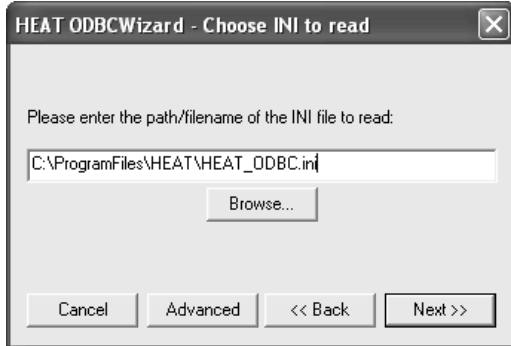   When finished, the **Done** dialog box appears.
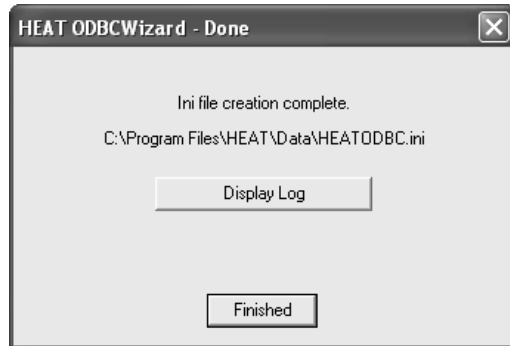
6. To view the Log file, click **Display Log**. The Log file records whether or not the .ini file was successfully created.

7. To exit the ODBC Wizard, click **Finished**.

To Configure a Data Source Based on an Existing .ini File

1. Double-click **ODBCWizard.exe**.

   The **Start** dialog box appears.

2. Select the **Read an INI file and configure data sources** option and then click **Next**.

   The **Choose INI to read** dialog box appears.

3. In the **enter path/filename** text box, type the location\file name of the .ini file you want to read or click **Browse** to navigate to a location. By default, the .ini file name HEAT looks for is HEAT_ODBC.ini.

4. Click **Next**. The HEAT ODBC Wizard reads the .ini file and creates a data source.

When finished, the **Done** dialog box appears.

5. To view the log, click **Display Log**. The Log file records whether or not the .ini file was successfully created.

6. To exit ODBC Wizard, click **Finished**.

in this appendix...

Running a Custom Installation
Custom Setup Features

b

Custom Setups

Overview

Custom Setups allow you to select specific program features for installation. You
select the items you want to install using the Custom Setup dialog box. This
dialog box is launched automatically if you choose the Custom Setup option in
the Setup Type dialog box.

Running a Custom Setup

You can choose to install an entire feature or an individual subfeature. When you select a feature or subfeature, the Feature Description area displays a description of the feature/subfeature and the amount of hard disk space it requires.

IMPORTANT: After the feature (or subfeature) is selected for installation, a Hard Drive icon 🖳 appears next to the item's name. A red ✖ indicates that the item is not selected for installation.

To View All Subfeatures Contained within a Feature

Click the Plus Sign (**+**) to the far left of the feature name. The feature list expands to display all subfeatures.
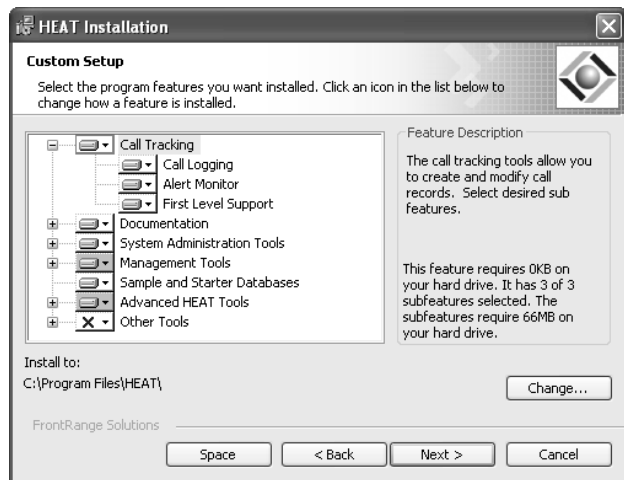
To Install an Entire Feature (Including its Subfeatures)

Click the arrow (▼) to the immediate left of the feature name and then select **This feature, and all subfeatures, will be installed on local hard drive** in the drop-down list. Click **Next** when finished.
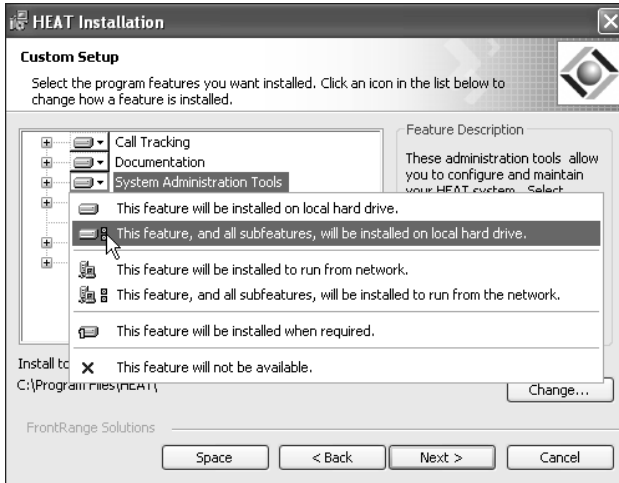
Note: You can also select **This feature, and all subfeatures, will be installed to run from the network** if you want the feature to run from a network location rather than a local location.

To Install an Individual Subfeature

Click the arrow (▼) to the left of the subfeature you want to install, and then select **This feature will be installed on local hard drive**. Click **Next** when finished.
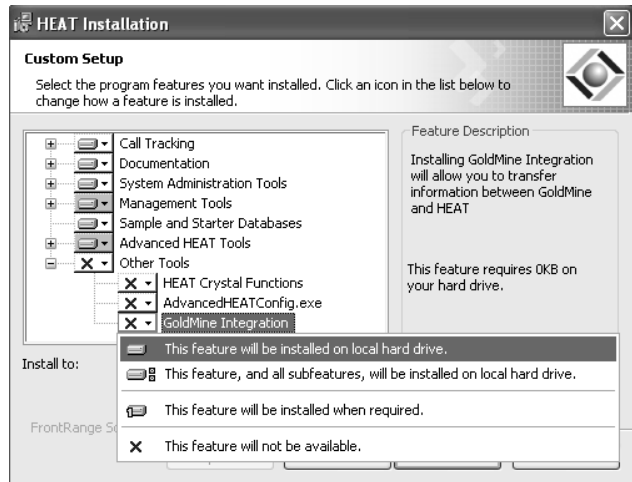
Note: You can also select **This feature will be installed to run from the network** if you want the feature to run from a network location rather than a local location.

To Install Advertised Features

Advertised features allow you to make HEAT modules available to your end users without using drive space for those modules that the end user doesn't use. The modules are "advertised" as available but not actually installed until the end user first attempts to use the module.

Note: Advertised features are only supported on certain operating systems and only on systems with Internet Explorer 4.01 or higher.

📖 For more information on Advertised features, see Microsoft Windows documentation.

Click the arrow (▼) to the left of the feature you want to install as an advertised feature, and then select **This feature will be installed when required**. Click **Next** when finished.
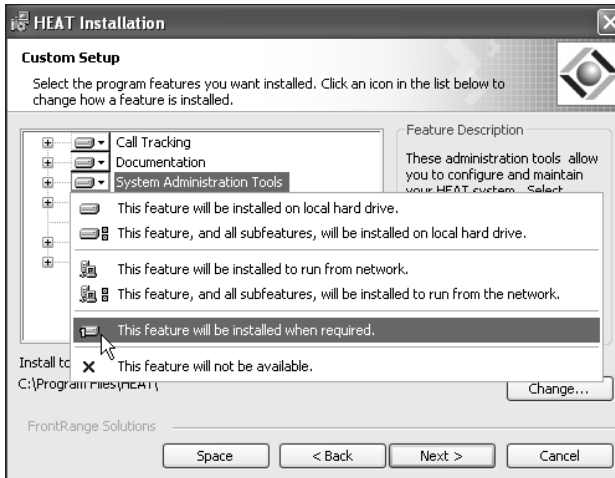
To Change the Installation Location of HEAT

Select the feature or subfeature whose installation location you want to change and then click **Change**.

The **Change Current Destination Folder** dialog box appears, allowing you to select a new location.
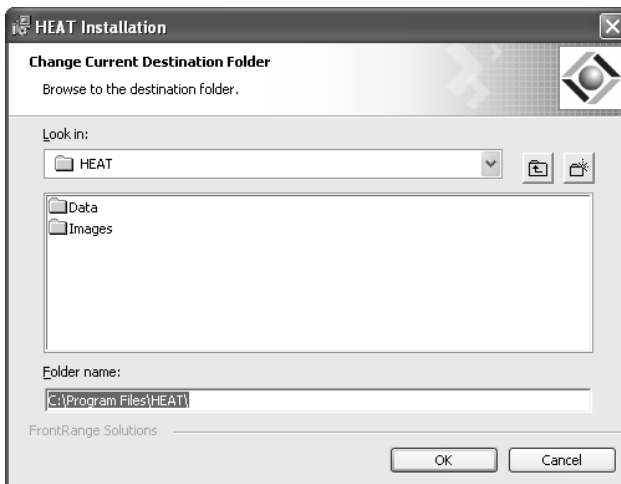
Custom Setup Features

These features/subfeatures are available in the Custom Setup dialog box.

Custom Setup Features		
Feature/Subfeature	**Description**	**Notes**
Call Tracking	The Call Tracking tools allow you to create and modify Call Records.	These are HEAT's most common features. These modules are installed automatically during a Typical Setup.
Call Logging	This is HEAT's core module. It provides all the tools you need to log, track, and resolve calls quickly and efficiently.	
Alert Monitor	This module notifies users of important events whether they are at their desks or away from them.	
First Level Support	This module is a knowledge base that assists in resolving calls, and maintaining and distributing Support Center knowledge.	
Documentation	Online manuals	
HEAT User Guide	This guide introduces you to the main modules and features of the entire HEAT suite of products.	
HEAT Administrator Guide	This guide introduces you to the main concepts and features of HEAT administration.	
What's New in HEAT 8.0	This guide describes new processes, features, and modules available in HEAT 8.0.	
HEAT Installation Guide	This guide describes the basic components and steps for installing HEAT 8.0 on your network and workstations.	

Custom Setup Features		
Feature/Subfeature	**Description**	**Notes**
System Administration Tools	These tools allow you to config-ure and maintain your HEAT sys-tem.	These are HEAT's most com-mon features. These mod-ules are installed automatically during a typical setup.
Administrator	This module contains numerous features for creating, customiz-ing, and securing your HEAT sys-tem.	Install this module on the sys-tem administrator's computer.
LoadDB Utility	This utility lets you load your HEAT database into an existing ODBC data source.	
Quick Start Wizard	This tool helps first-time adminis-trators create and customize their HEAT database.	
Business Rule Editor	This module helps you define the Business Rules you want to run on your system.	Install this module to work with Business Rule Monitor. Business Rule Editor is auto-matically installed with Busi-ness Rule Monitor (to the same NT computer); however, you can also install it on other computers so that users can edit Business Rules.
Management Tools	Manager's tools provide customi-zable information on your HEAT system.	
Answer Wizard	This module allows you to browse and run reports provided by HEAT or custom reports you create.	Special Oracle reports are available to install.
Manager's Console	This module is a management tool that monitors that status of vital organizational processes.	
Sample and Starter Databases	This installs a preconfigured Sample database and a Starter database, which the Quick Start Wizard helps you customize.	These tools require additional configuration and should be installed on only one com-puter.

Custom Setup Features		
Feature/ Subfeature	**Description**	**Notes**
Advanced HEAT Tools	These advanced tools help you automate your HEAT system.	
Auto Ticket Generator	This module automatically creates or updates Call Records from e-mail messages or text files.	
Business Rule Monitor	This is a service that monitors your database based on Business Rules created in the Business Rule Editor. Business Rule Editor and Business Rule Monitor comprise the Business Process Automation Module (BPAM).	This module is for use only on a computer that can run services and should be installed to work with the Business Rule Editor. Business Rule Editor is automatically installed with Business Rule Monitor to the same computer.
FLS Text Search Service	This is an NT service that works with Microsoft Index Server to improve search performance on large FLS databases.	
Other Tools	These are third-party applications and advanced tools that work with HEAT.	
HEAT Crystal Functions	This enables Crystal Reports to access HEAT-specific functions.	Install HEAT Crystal functions to the default location. If Crystal Reports is already installed on your computer, you can use this feature to access HEAT date/time calculation features.
AdvancedHEAT Config.exe	This executable is used to safely modify the HEAT registry settings.	
GoldMine Integration	This feature allows you to transfer information between HEAT and GoldMine.	This is required to support the integration of HEAT with GoldMine.

Command-Line Options

Overview

The executable program Msiexec.exe interprets Microsoft Windows Installer packages (.msi files) and installs products. Note that Msiexec also sets an error level on return that corresponds to the Win32 error codes. The following information lists the command-line options for this program. You may set one or more properties on the command line after any switches.

IMPORTANT: You can only install and configure HEAT by command-line if the Microsoft Windows Installer Service is already installed. Install it by launching either instmsiA.exe (for Windows 98) or instmsiW.exe (for Windows NT) from the HEAT CD or HEAT Administrative image location. For Windows NT, only the local computer's administrator can install the Windows Installer Service. Windows 2000 comes with the Windows Installer Service pre-installed.

Option Parameters

- **/I Package|ProductCode:** Installs or configures a product.

- **/f [p|o|e|d|c|a|u|m|s|v] Package|Product Code:** Repairs a product. This option ignores any property values entered on the command line. The default argument list for this option is **'pecms'**.

  - **p:** Reinstalls only if the file is missing.

  - **o:** Reinstalls if the file is missing or if an older version is installed.

  - **e:** Reinstalls if the file is missing or an equal or older version is installed.

  - **d:** Reinstalls if the file is missing or a different version is installed.

  - **c:** Reinstalls if the file is missing or the stored checksum doesn't match the calculated value. Repairs only those files that have msidbFileAttributesChecksum in the Attributes column of the File table.

  - **a:** Forces the reinstallation of all files.

  - **u:** Rewrites all required user-specific registry entries.

  - **m:** Rewrites all required computer-specific registry entries.

  - **s:** Overwrites all existing shortcuts.

  - **v:** Runs from source and re-caches the local package.

- **/a:** Package Administrative installation option: Installs a product on the network.

- **/x Package|ProductCode:** Uninstalls a product.

- **/L [i|w|e|a|r|u|c|m|o|p|v|+|!]Logfile:** Specifies path to log file. The flags indicate which information to log.

- **i:** Status messages
- **w:** Nonfatal warnings
- **e:** All error messages
- **a:** Start-up of actions
- **r:** Action-specific records
- **u:** User requests
- **c:** Initial UI parameters
- **m:** Out-of-memory or fatal exit information
- **o:** Out-of-disk-space messages
- **p:** Terminal properties
- **v:** Verbose output
- **+:** Append to existing file
- **!:** Flush each line to the log
- **"*"**: Wildcard, log all information except for the v option. To include the v option, specify "/l*v".

- **/m filename:** Generates an SMS status .mif file. Must be used with either the install (-i), remove (-x), administrative installation (-a), or reinstall (-f) options. The ISMIF32.DLL is installed as part of SMS and must be on the path.

  The fields of the status .mif file are filled with the following information:

  - **Manufacturer:** Author
  - **Product:** Revision Number
  - **Version:** Subject
  - **Locale:** Template
  - **Serial Number:** Not set
  - **Installation:** Set by ISMIF32.DLL to "DateTime"
  - **InstallStatus:** "Success" or "Failed"
  - **Description:** Error messages in the following order:

    1) Error messages generated by installer.
    2) Resource from msi.dll if install could not commence or user exit.
    3) System error message file.
    4) Formatted message: "Installer error %i", where %i is error returned from msi.dll.

- **/q n|b|r|f:** Sets user interface level.

  - **q, qn:** No UI
  - **qb:** Basic UI
  - **qr:** Reduced UI with a modal dialog box displayed at the end of the installation.
  - **qf:** Full UI with a modal dialog box displayed at the end.
  - **qn+:** No UI except for a modal dialog box displayed at the end.
  - **qb+:** Basic UI with a modal dialog box displayed at the end. The modal box is not displayed if the user cancels the installation.
  - **qb- :** Basic UI with no modal dialog boxes. Please note that /qb+- is not a supported UI level.

- **/? or /h:** Displays copyright information for the Windows Installer.

Available Properties

ADDLOCAL=: Comma-delimited list of features including one or more of the following:

- **ALL:** Installs all HEAT modules
- **Call_Logging:** Installs Call Logging
- **Alert_Monitor:** Installs Alert Monitor
- **First_Level_Support:** Installs First Level Support
- **HEAT_User_Guide:** Installs the *HEAT User Guide*
- **HEAT_Administrator_Guide:** Installs the *HEAT Administrator Guide*
- **HEAT_Installation_Guide:** Installs the *HEAT Installation Guide*
- **HEAT_Whats_New:** Installs the *What's New in HEAT 8.0* manual
- **Administrator:** Installs HEAT Administrator
- **LoadDB_Utility:** Installs the LoadDB Utility
- **Quick_Start_Wizard:** Installs the Quick Start Wizard
- **Business_Rule_Editor:** Installs the Business Rule Editor
- **Answer_Wizard:** Installs Answer Wizard
- **Managers_Console:** Installs Manager's Console
- **HFWFunctions:** Makes HEAT functions available to Crystal Reports.

REMOVE=: Comma-delimited list of features including one or more of the following:

- **ALL:** Uninstalls all HEAT modules
- **Call_Logging:** Uninstalls Call Logging
- **Alert_Monitor:** Uninstalls Alert Monitor
- **First_Level_Support**: Uninstalls First Level Support
- **HEAT_User_Guide** Uninstalls the *HEAT User Guide*

- **HEAT_Administrator_Guide:** Uninstalls the *HEAT Administrator Guide*

- **HEAT_Installation_Guide:** Uninstalls the *HEAT Installation Guide*

- **HEAT_Whats_New:** Uninstalls the *What's New in HEAT 8.0* manual

- **Administrator:** Uninstalls HEAT Administrator

- **LoadDB_Utility:** Uninstalls the LoadDB Utility

- **Quick_Start_Wizard:** Uninstalls the Quick Start Wizard

- **Business_Rule_Editor:** Uninstalls the Business Rule Editor

- **Answer_Wizard:** Uninstalls Answer Wizard

- **Managers_Console:** Uninstalls Manager's Console

- **HFWFunctions:** Removes HEAT functions from Crystal Reports

- **INSTALLDIR=:** The path to which you should install HEAT

IMPORTANT: The INSTALLDIR value does not have to be DOS-compliant. You can include a long path. If your long path includes spaces then the INSTALLDIR value must be in quotes (INSTALLDIR="C:\Program Files\HEAT").

Example: To install HEAT Call Logging and First Level Support to C:\HEAT with only essential user interface (progress dialog and severe errors), use the following command line:

```
Msiexec.exe /ix:\HEAT.msi /qb-
DDLOCAL=Call_Logging,First_Level_Support
INSTALLDIR=C:\HEAT
```

IMPORTANT: The command must be all on one line.

Index