



# HEAT<sup>®</sup> Installation Guide

Version 9.5.3

Copyright © 2011 FrontRange Solutions USA Inc. All Rights Reserved.

The Sentry Spelling-Checker Engine Copyright © 1999 Wintertree Software Inc.

The HEAT Web-based Call Logging product may contain the following and other open source components:

- GWT-Ext, Copyright (c) 2007-2008 GWT-Ext LLC. which is licensed under the GNU LESSER GENERAL PUBLIC LICENSE v3.0;
- Hibernate, Copyright 2006, Red Hat Middleware, LLC. which is licensed under the GNU LESSER GENERAL PUBLIC LICENSE v3.0;
- iText-2.1.3- Copyright (c) 1999-2008 by Bruno Lowagie and Paulo Soares. All Rights Reserved. which is licensed under the GNU LESSER GENERAL PUBLIC LICENSE v2.1;
- javassist Copyright (c) 1999-2003 Shigeru Chiba. All Rights Reserved. which is licensed under the GNU LESSER GENERAL PUBLIC LICENSE v2.1;
- antlr 2.7.6 Copyright (c) 2003-2006, Terence Parr. All rights reserved.
- asm Copyright (c) 2000-2005 INRIA, France Telecom. All rights reserved.
- dom4j-1.6.1 Copyright (c) 2001-2005 MetaStuff, Ltd. All Rights Reserved.
- jaxen-1.1.1 Copyright (c) 2003-2006 The Werken Company. All Rights Reserved.
- Slf4j-1.5 Copyright (c) 2004-2008 QOS.ch. All rights reserved.
- Joda Time Copyright (c) 2001-2004 Stephen Colebourne
- c3p0 © 2006 Machinery For Change, Inc.

*USE OF THIS SOFTWARE AND ITS RELATED USER DOCUMENTATION IS SUBJECT TO THE TERMS AND CONDITIONS OF THE APPLICABLE END-USER LICENSE AGREEMENT (EULA), A COPY OF WHICH IS FOUND IN THE USER DOCUMENTATION FOLDER INCLUDED IN THE SOFTWARE. YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE EULA IN ORDER TO USE THIS SOFTWARE. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THE EULA, RETURN THE UNUSED SOFTWARE WITHIN THIRTY (30) DAYS OF PURCHASE IN ITS UNOPENED PACKAGE TO THE PLACE FROM WHICH YOU OBTAINED IT FOR A REFUND (MINUS ANY RESTOCKING FEE).*

WARNING: The software described in this manual and its related user documentation are protected by copyright law. In no event, shall any part of the related user documentation be copied, reproduced, distributed, transmitted, stored in a retrieval system, or translated into any language, without the express written permission of FrontRange Solutions USA Inc.

#### FrontRange Trademark Information

The following are trademarks of FrontRange Solutions USA Inc. and/or its affiliates in the United States and/or other countries: FrontRange Solutions®, FrontRange™, SaaSIT™, ModernizeIT™, SaaS<sup>2</sup>™, GoldMine®, GoldSync®, GoldMine® Answer Wizard™, GoldMine® Management Intelligence™, GoldMine® Manager's Console™, iGoldMine™, HEAT®, HEAT® Service & Support™, HEAT® PowerDesk™, iHEAT™, HEAT® Self Service™, HEAT® Manager's Console™, HEAT® Answer Wizard™, HEAT® Quick Start Wizard™, InfoCenter®, Automated Processes™, First Level Support®, enteo®, DeviceWall®, Centennial Discovery®, Discovery Dashboard®, MicroAudit®, SAM™ and other FrontRange products and brands.

#### Other Trademark Information

Other products and brands are the trademarks of their respective owners or companies.

Contact FrontRange Solutions USA Inc. at our Web site: **[www.frontrange.com](http://www.frontrange.com)**

(Sept 2010)



# Table of Contents

## Introduction

About this Guide .....	1
Audience and Expertise .....	1
Welcome to HEAT. ....	2
HEAT Modules and Utilities. ....	2

## Preparation and Planning

HEAT System Requirements .....	5
Database Server Requirements .....	6
Administrator and End-User Workstation Requirements. ....	6
HEAT Messaging Center Workstation Requirements .....	7
Web Server Requirements .....	7
Web Client Workstation Requirements .....	8
Installation Checklists. ....	8
Administrator Installation Checklist .....	8
End-User Installation Checklist .....	9
Post-Installation Configurations Checklist .....	9

## Installing HEAT

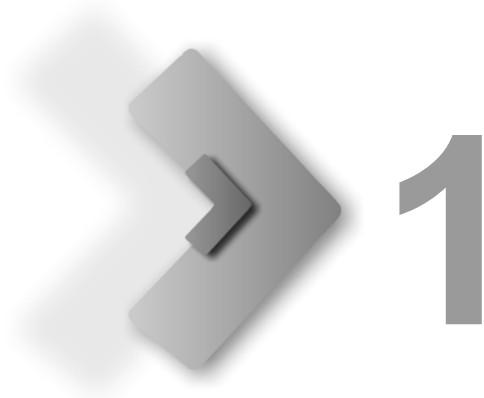
Installation Wizard .....	11
Setup Types. ....	11
Administrator Workstation .....	12
End-User Workstations .....	20
Unattended End-User Installation .....	23
Post-Installation Configurations .....	25
Complete the Database Configuration .....	25
Web Server Database Configuration .....	29
Upgrade Assistance Utility. ....	30

## Command-Line Options

Options .....	33
Available Properties .....	34
Examples .....	34

## Resources

Additional Documentation .....	35
Contact Us .....	36



# Introduction

---

## About this Guide

The *HEAT Installation Guide* describes the basic components and steps for installing HEAT on your network and workstations.

### Audience and Expertise

The material assumes the administrator has a basic understanding of databases and the Microsoft Windows operating system.

## Welcome to HEAT

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. HEAT supplies 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 Modules and Utilities

The following are the core HEAT components:

---

**Note:** *The HEAT installation CD contains the core HEAT modules, utilities, and HEAT Self Service. HEAT Self Service is a separately licensed module. The core modules installed depend upon the Installation Type you select (**Typical**, which installs Call Logging, Alert Monitor, and First Level Support, or **Custom**). Add-on modules such as Discovery and HEAT Plus Knowledge are installed from separate CDs and have their own documentation.*

---

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

**Recommendation:** Installed for Power Users who need full Tracking Capability.

- **Web-based Call Logging** - A Web-based interface that provides the major functionality of Call Logging through a browser (it can run on any browser).

**Recommendation:** Installed for remote/level one technician access.

- **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. Install for all users who need to monitor queues.

**Recommendation:** Install Alert Monitor on all user computers.

- **HEAT Plus Knowledge (HPK)** - The HEAT knowledge base solution, which integrates with HEAT Call Logging and HEAT Self Service. HPK is a Web-based application that uses hierarchical content collections to store, author, and share knowledge. The use of HPK within Call Logging allows for searching and automatically populating knowledge articles utilizing information within Call Logging. HPK is installed separately; refer to the *HEAT Plus Knowledge Installation Guide* for HPK installation information.

**Recommendation:** Install on a Web server that has enough space to store a knowledge base. Refer to the *HEAT Plus Knowledge Installation Guide*, "System Requirements" chapter, for details.

- **HEAT Self Service (HSS)** - HSS uses Web technology to provide your customers with the ability to research issues or submit issues to your support group. Submitted issues are logged into the HEAT system and tracked through HEAT Call Logging. Users can also view the status of their tickets and add information to open tickets. In addition, HSS can be integrated with HEAT Plus Knowledge (HPK), so your users can research the resolution to problems or issues.

**Recommendation:** Install on a Web server.

- **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. Install for all users who need to access knowledge bases.

**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 manager 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 (includes Crystal Reports compatible with either MS SQL or Oracle databases).

**Recommendation:** Install Answer Wizard on manager 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 Windows Server 2003 or Windows Server 2008 server computer.

- **HEAT Survey** - HEAT Survey provides the means to easily measure customer satisfaction through the use of customer surveys. Surveys are published via the web, and distributed using email capabilities. HEAT Survey is installed separately.

**Recommendation:** Install on a Web server.

- **HEAT Messaging Center (HMC)** - Provides an automated process for creating and updating Call Records, Customer Records, and Configuration records from e-mail, XML or text files, or using Web Services.

**Recommendation:** Install the HMC Message Processor component on a Windows Server 2003 or Windows Server 2008 server computer. Install the HMC Message Sources (listeners) on any supported Windows computer.

- **Administrator** - The Administrator module 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, etc. for the entire HEAT suite.

**Recommendation:** Install Administrator only on the system administrator computer.

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

**Recommendation:** Install the Load HEAT utility only on the system administrator computer.







## Preparation and Planning

---

This chapter provides you with the minimum system requirements for successful installation of HEAT, as well as any pre-installation planning that may be needed.

### HEAT System Requirements

The HEAT system requirements are arranged in tables pertaining to the specific server or workstation.

---

**Note:** *It is recommended that a server be dedicated exclusively to the HEAT database in larger implementations. 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 than the recommended version, or if you want to ascertain if your software version or software driver is compatible with your HEAT product, use the HEAT Matrix in our knowledge base at <http://www.frontrange.com/Support/> (maintenance customers only).

## Database Server Requirements

All system requirements were developed using Microsoft SQL Server or Oracle as the HEAT database application. When using other database applications, contact the database vendor for recommendations.

Hardware Requirements	Software Requirements
<ul style="list-style-type: none"> <li>• Duo Core 2.1 GHz</li> </ul>	<b>Operating system:</b> <ul style="list-style-type: none"> <li>• Windows Server 2003, Standard Edition, SP2 (32-bit only)</li> <li>• Windows Server 2008, Enterprise Edition, SP2 (32- and 64-bit)</li> </ul>
<ul style="list-style-type: none"> <li>• 2 GB RAM</li> </ul>	<b>Database Management Software:</b> <ul style="list-style-type: none"> <li>• Microsoft SQL Server 2005, SP3 or later</li> <li>• Microsoft SQL Server 2008 (32- and 64-bit)</li> <li>• Oracle 10gR2, using the 10.02.0.04 driver</li> <li>• Oracle 11g (32- and 64-bit), using the 11.0.0.01 driver</li> </ul>
<ul style="list-style-type: none"> <li>• 1.5 GB of disk space for full HEAT installation</li> </ul>	
<ul style="list-style-type: none"> <li>• 2 - 3 MB of hard drive space for every 1,000 records</li> </ul>	

## Administrator and End-User Workstation Requirements

The following system recommendations are for user installations of the core HEAT modules (Administrator, Call Logging, Alert Monitor, Manager's Console, Business Process Automation Module, etc.).

Hardware Requirements	Software Requirements
<ul style="list-style-type: none"> <li>• 2 GHz (1.2 GHz minimum)</li> </ul>	<b>Operating system:</b> <ul style="list-style-type: none"> <li>• Windows XP Pro, SP 3 or later (32 bit only)</li> <li>• Windows Vista, Ultimate Edition, SP2 (32-bit only)</li> <li>• Windows 7.0 (32- and 64-bit when running HEAT in 32-bit mode)</li> <li>• Windows Server 2003, Standard Edition, SP2 (32-bit only)</li> <li>• Windows Server 2008, Enterprise Edition, SP2 (32- and 64-bit)</li> </ul>
<ul style="list-style-type: none"> <li>• 2 GB RAM (1 GB minimum)</li> </ul>	<ul style="list-style-type: none"> <li>• .NET 3.5 Framework</li> </ul>

**Note:** HEAT 9.5.3 supports the use of Crystal 2011 and Desktop & Server Management (DSM) 6.x.

## HEAT Messaging Center Workstation Requirements

The following system recommendations are for the workstation running HEAT Messaging Center.

Hardware Requirements	Minimum Software Requirements
<ul style="list-style-type: none"> <li>• 2 GHz - minimum; low volume e-mail traffic</li> <li>• Duo Core 2.3 GHz - recommended for high volume e-mail traffic</li> </ul>	<b>Operating system:</b> <ul style="list-style-type: none"> <li>• Windows XP Pro, SP 3 or later (32-bit only)</li> <li>• Windows Vista, Ultimate Edition, SP2 (32-bit only)</li> <li>• Windows 7.0 (32- and 64-bit)</li> <li>• Windows Server 2003, Standard Edition, SP2 (32-bit only)</li> <li>• Windows Server 2008, Enterprise Edition, SP2 (32- and 64-bit)</li> </ul>
<ul style="list-style-type: none"> <li>• 1 GB RAM - minimum; low volume e-mail traffic</li> <li>• 2 GB RAM - recommended for high volume e-mail traffic</li> </ul>	<b>Database Management Software:</b> <ul style="list-style-type: none"> <li>• MSSQL Server Express 2008</li> <li>• Microsoft SQL Server 2005</li> <li>• Microsoft SQL Server 2008</li> </ul>
	<ul style="list-style-type: none"> <li>• .NET 3.5 Framework</li> </ul>
	<ul style="list-style-type: none"> <li>• IIS 6.0 or later (only for use with the Web Services Listener; because IIS 6.0 is not available for Windows XP, the Web Services Listener is not supported in Windows XP)</li> </ul>

## Web Server Requirements

The following system recommendations are for the Web-based Call Logging web server.

Hardware Requirements	Software Requirements
<ul style="list-style-type: none"> <li>• Duo Core 2.3 GHz (1 - 25 users)</li> <li>• Dual Duo Core 2.3 GHz (25 - 50 users)</li> </ul>	<b>Operating system:</b> <ul style="list-style-type: none"> <li>• Windows Server 2003, Standard Edition, SP2 (32-bit only)</li> <li>• Windows Server 2008, Enterprise Edition, SP2 (32- and 64-bit)</li> </ul>
1 GB RAM (1 - 25 users) 2 GB RAM (25 - 50 users)	<ul style="list-style-type: none"> <li>• .NET 3.5 Framework</li> </ul>
1.5 Mbps connection	

## Web Client Workstation Requirements

The following system recommendations are for the workstations running Web-based Call Logging.

Hardware Requirements	Software Requirements
1.5 Mbps connection	<ul style="list-style-type: none"> <li>• Internet Explorer 7.0, SP 3 or later</li> <li>• Internet Explorer 8.0</li> </ul> <p>(FrontRange Solutions suggests using the Google Chrome Frame when using Internet Explorer to access Web-Based Call Logging:  <a href="http://code.google.com/chrome/chromeiframe/">http://code.google.com/chrome/chromeiframe/</a>)</p>
	<ul style="list-style-type: none"> <li>• Google Chrome 3.0 or later</li> </ul>
	<ul style="list-style-type: none"> <li>• Mozilla Firefox 3.5 or later</li> </ul>
	<ul style="list-style-type: none"> <li>• Safari 3.1 or later</li> </ul>

## Installation Checklists

The following checklists provide you with basic guidelines for installing HEAT.

### Administrator Installation Checklist

- ☐ Back up your HEAT database (upgrading customers only). FrontRange Solutions recommends backing up your database (using database management tools) before beginning any installation. This prevents the loss of valuable, company-specific information such as Customer Types, Call Types, fields, etc.
- ☐ Back up your BPAM Log files (usually stored at Program Data>FrontRange Solutions>HEAT>Logs>BRM for Server 2008 or Windows 7, and in the HEAT/Log Files folder for Server 2003 and XP). This prevents the loss of data and history. If using MSDE/SQL Express for the blocking tables, perform a back-up using SQL Tools.
- ☐ If installing Web-based Call Logging or HEAT Self Service, make sure the database server has a TCP/IP-enabled transport protocol.
- ☐ If using SQL Server, make sure it allows SQL Server Authentication mode (Mixed Mode option when installing SQL Server).
- ☐ 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 HEAT services.
- ☐ Install HEAT on the server computer and the administrator computer using the Administrator installation procedure. Refer to "[Administrator Workstation](#)" on page 12. You can also create an installation image to use for an unattended installation on end-user workstations. Refer to "[Unattended End-User Installation](#)" on page 23 for details.
- ☐ License HEAT. Licensing registers HEAT and its numerous modules. Licensing is conducted through the Administrator module. Refer to "Setting Security" in the HEAT Administrator online help.

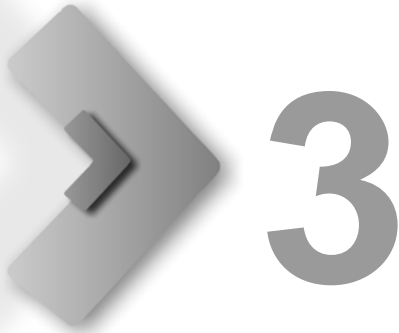
## End-User Installation Checklist

- ❑ 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.
- ❑ Install HEAT on an end-user workstation. The steps for an End-User installation are provided in Chapter 3. Refer to ["End-User Workstations" on page 20](#). You can also use the Upgrade Assistance Utility to facilitate client workstation upgrades. Refer to ["Upgrade Assistance Utility" on page 30](#) for details.

## Post-Installation Configurations Checklist

- ❑ Complete the HEAT database configuration by creating the ODBC data source, then initialize the HEAT database using the .haf file. Refer to ["Complete the Database Configuration" on page 25](#).
- ❑ Use the **Web Server DB Configuration Tool** to set Web-based Call Logging and HEAT Self Service database parameters. Refer to ["Web Server Database Configuration" on page 29](#).
- ❑ Use **Upgrade Assistance Utility** to monitor client workstation upgrades when upgrading from HEAT 9.5.0. Refer to ["Upgrade Assistance Utility" on page 30](#).





## Installing HEAT

---

This chapter contains step-by-step instructions for HEAT installation as well as post-installation configuration procedures.

### Installation Wizard

The HEAT Installation Wizard walks you through the installation process. To navigate through the HEAT Installation Wizard, follow the directions in the windows and dialog boxes.

To navigate through the HEAT Installation Wizard, click the **Next** or **Back** buttons. To cancel the installation and exit the wizard at any time, click **Cancel**.

### Setup Types

Two setup types are available for installations:

- **Typical** - Installs the most common HEAT features: Call Logging, Alert Monitor, and First Level Support.
- **Custom** - Allows the user to select specific modules and features for installation, such as the Administrator module for installation on the system administrator's computer. Additional options such as GoldMine Integration, installing HEAT Messaging Center, and installing Web Services modules (Web-based Call Logging and HEAT Self Service) are also available with this setup type.

---

**CAUTION:** Custom setups are recommended for system administrators or for computers dedicated to specific modules. For example, if a computer were dedicated to run the HEAT Messaging Center, users could run a Custom setup to install only the HEAT Messaging Center on a particular computer.

---

### Unattended Installation

When you run the HEAT installation wizard, it runs in an interactive mode, prompting you for required information. With an unattended installation, you can run the wizard in silent mode, with no user interface displaying, because the responses have been packaged. A silent installation is especially useful when deploying a large number of clients. Refer to ["Unattended End-User Installation" on page 23](#), and follow the procedure for imaging (packaging) the installation and enabling an unattended install.

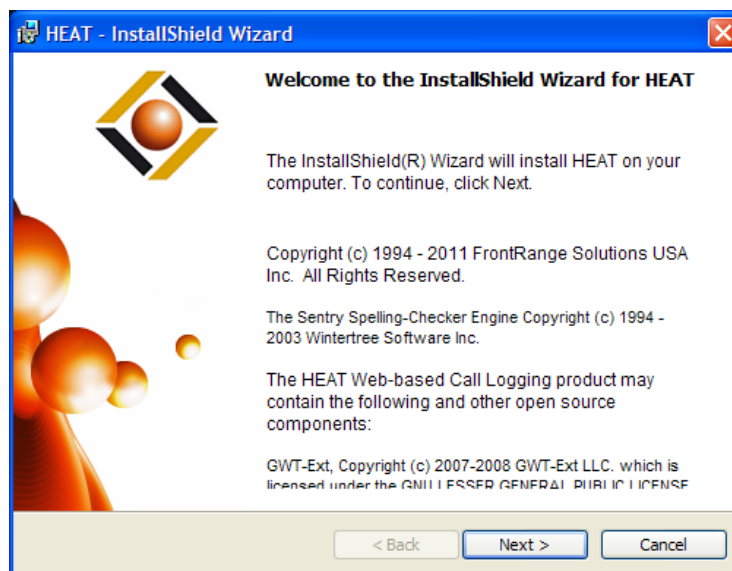
## Administrator Workstation

Installation on the administrator (and/or server) computer utilizes the **Custom** setup type.

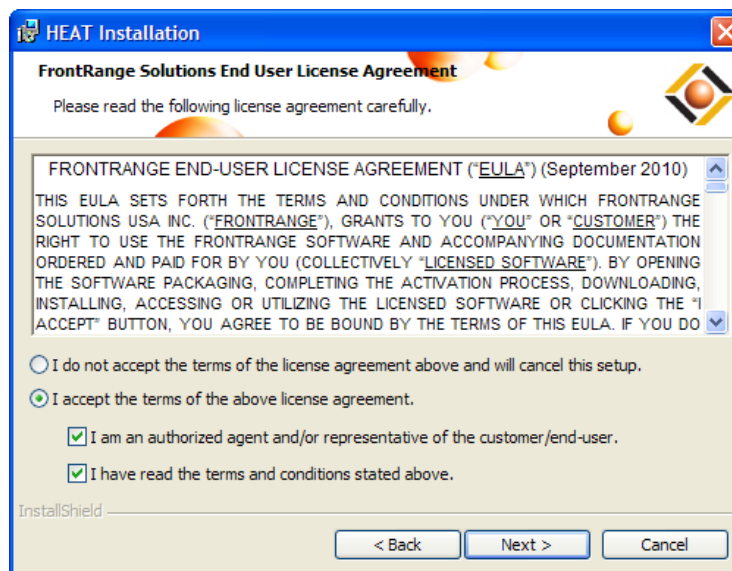
### ► To Install HEAT on the Administrator Workstation:

- 1 Insert the HEAT Installation CD into your CD-ROM drive. The installation wizard opens to the **Welcome to the InstallShield Wizard for HEAT** dialog box.

**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 type: [X]\:.setup.exe, where [X] is the letter of your CD-ROM drive.



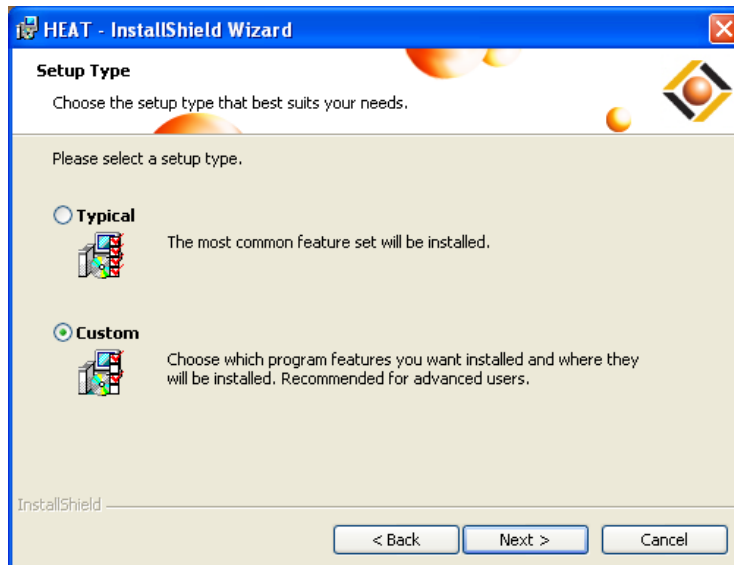
- 2 Click **Next**. The **FrontRange Solutions End User License Agreement** dialog box opens.



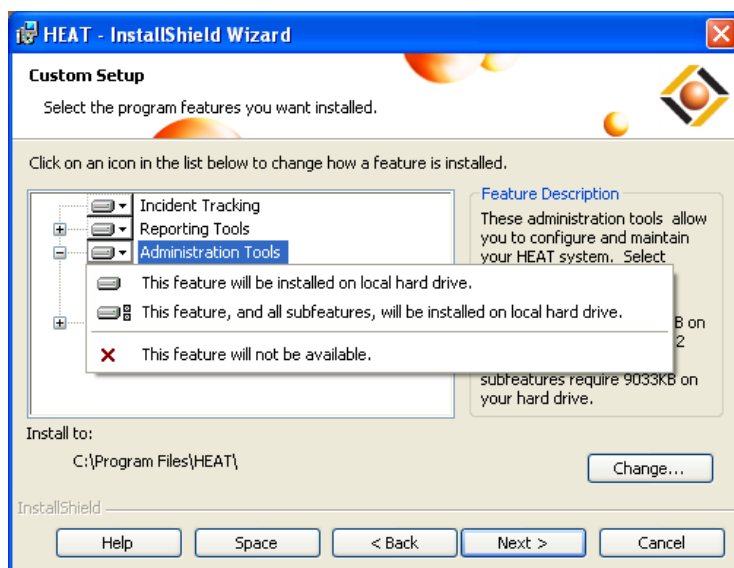
- 3 Review the licensing information and click the **I accept** radio button and check boxes if you agree to the terms.




- 4 Click **Next**. The **Setup Type** dialog box opens.



- 5 For the Administrator workstation installation, select the **Custom** option, so you can select the specific HEAT components to be installed, including HEAT Administrator (the **Typical** option installs only Call Logging, Alert Monitor, and First Level Support). The **Custom Setup** dialog box opens.



- 6 In the **Custom Setup** dialog box, you can install a feature, a feature with its corresponding subfeatures, or an individual subfeature. To view subfeatures for a feature, click the plus sign (+) to the left of the feature name. To select features, click the feature drop-down arrow, then select the desired option.
- When you select a feature or subfeature, the **Feature Description** section displays a description of the feature/subfeature and the amount of hard disk space it requires.

- After the feature (or subfeature) is selected for installation, the corresponding icon changes from a red **X** to a hard drive symbol .

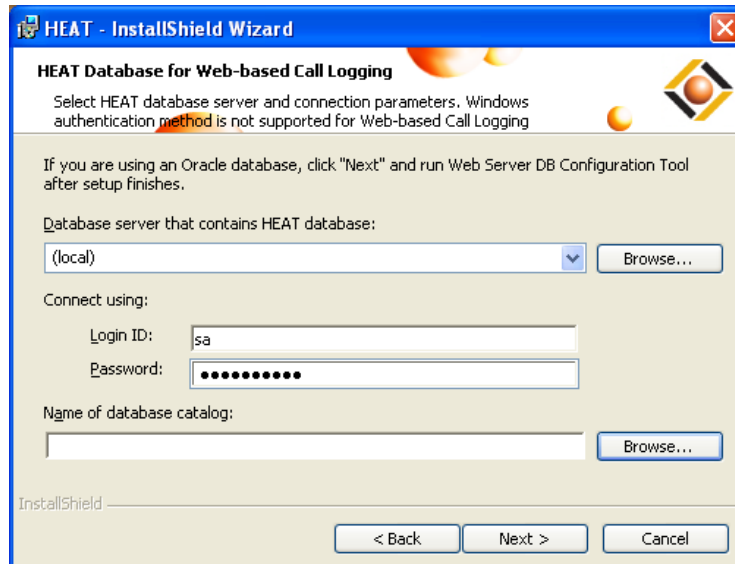
Feature/SubFeature	Description
<b>Incident Tracking</b>	Installs the Call Logging module, which provides all the tools you need to log, track, and resolve calls (includes Alert Monitor and First Level Support).
<b>Reporting Tools</b>	Installs the following reporting tools.
Answer Wizard	Allows you to browse and run reports provided by HEAT or custom reports you create.
Manager's Console	A management tool that monitors that status of vital organizational processes.
<b>Administration Tools</b>	These tools allow you to configure and maintain your HEAT system (includes the Load HEAT utility).
Administrator	This module contains features for creating, customizing, and securing your HEAT system.
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 automatically installed with Business Rule Monitor; however, you can also install it on other computers so users can edit Business Rules.
<b>Automation Services</b>	Installs the following automation services.
Integrations	Tools for integration with other products.
GoldMine Ticket Transfer	Service used to transfer call ticket information between HEAT and GoldMine.

Feature/SubFeature	Description
Link to LDAP	Imports data from an LDAP system (LDAP is a common application protocol for querying and modifying services running over TCP/IP)
HEAT Messaging Center	Provides an automated process for creating and updating Call Records, Customer Records, and Configuration records from e-mail, XML or text files, or using Web Services
Message Processor	A HEAT Messaging Center component, which handles message flow, executing conditional Messaging Rules against every incoming message.
POP3 Listener	A HEAT Messaging Center component; a Message Source which collects the messages from external email providers using POP3 email protocols.
MAPI Listener	A HEAT Messaging Center component; a Message Source which collects the messages from external email providers using MAPI email protocols.
Lotus Listener	A HEAT Messaging Center component; a Message Source which collects the messages from external email providers using Lotus email protocols.
XML Listener	A HEAT Messaging Center component; a Message Source which monitors the content of a folder or shared drive and imports new XML file contents to the HMC.
Text File Listener	A HEAT Messaging Center component; a Message Source which monitors the content of a folder or shared drive and imports new file contents to the HMC.
GroupWise Listener	A HEAT Messaging Center component; a Message Source which collects the messages from external email providers using Novell GroupWise email protocols.

Feature/SubFeature	Description
FLS Text Search Service	A tool used to assist Microsoft Indexing Service with indexing an exported FLS tree.
BPAM Service	Creates, monitors, and executes Call Record conditions, called Business Rules.
Web Services	Web-based modules.
Web-based Call Logging	A Web-based interface that provides the major functionality of Call Logging through a browser. If you select this option, you must also select the HEAT Self Service option, since that option also installs the Web Server configuration tools.
HEAT Self Service	Provides an Internet interface and manages data between the Web interface and your HEAT database; provides 3 modules: HEAT Self Service intended for users supported by your organization's help desk, Web Server Configuration Tool used by administrators to configure Web-based Call Logging and HSS, and Web Server DB Configuration Tool used by administrators to configure the Web-based Call Logging and HSS database.
Legacy Applications	
Auto Escalation	Helps ensure that your calls are resolved in a timely manner by establishing rules and criteria for escalation.
Auto Ticket Generator	Creates or updates Call Records from e-mail or text files (replaced by HEAT Messaging Center).

- 7 Select the desired features/subfeatures, then click **Next**. If you opted to install Web Services (either Web-based Call Logging or HEAT Self Service, or both), the **HEAT Database for Web-based Call Logging** dialog box displays, enabling you to select the database server and database for Web-based Call Logging and HSS.

**Note:** *If using an Oracle database, leave the default settings and click Next to proceed through the installation wizard. You will configure the Oracle database post-installation, in the Web Server DB Configuration tool. Refer to "Web Server Database Configuration" on page 29.*



- 8 In the **Database server that contains HEAT database** field, accept the default or click **Browse** to select from the list of database servers. In the **Connect using** section, specify the SQL Login ID and Password. In the **Name of database catalog** field, type the database name or click **Select** to select the database.
- 9 Click **Next**. If you opted to install HEAT Messaging Center (and if no SQL servers are detected on the computer on which the installation is running), the **Database type for HEAT Messaging Center** dialog box displays.



- 10** You can choose to install the HMC database together with Microsoft SQL Express or you can install the HMC database on a SQL server.
- 11** Click **Next**. If you selected the second option, the **HEAT Messaging Center database** dialog box opens, enabling you to select the database server and authentication method.

---

**Note:** You can also create the HMC database post-installation by launching HMC and clicking the **Create Database** button on the **Messaging Storage** tab. Refer to "HEAT Messaging Center" in the Administrator online help.

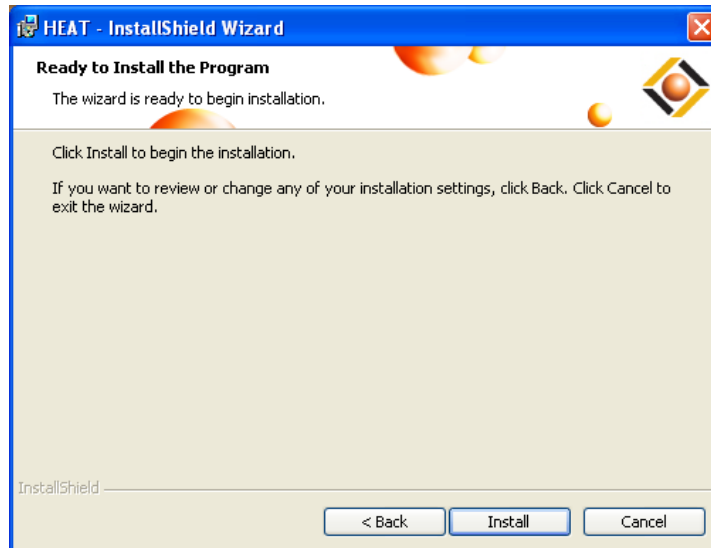
---



- 12** In the **Database server that you are installing to** field, accept the default or click **Browse** to select from the list of database servers.
- Specify the authentication method:
    - » Select Windows authentication.
    - » Specify the SQL Login ID and Password.

- In the **Name of HEAT Messaging Center database** field, type the database name or click **Browse** to locate and select the database.
- If you selected a new, empty database, select the **Initialize empty database** check box.

**13** Click **Next**. The **Ready to Install the Program** dialog box opens.



**14** Click **Install**. If installing HMC, a message may appear stating HMC requires ASP .net 2.0 to be registered with IIS. Click **OK**.

**15** When installation is complete, the **InstallShield Wizard Completed** dialog box opens. Click **Finish**.



## End-User Workstations

For most end-user workstations, you will probably run the **Typical** installation, which installs the most common HEAT features: Call Logging, Alert Monitor, and First Level Support. However, if you want to install other HEAT modules, or if you want to install Web-based Call Logging, use the **Custom** installation option (follow the installation instructions for the Administrator workstation).

### ► To Install HEAT on the End-User Workstations:

- 1 Insert the HEAT Installation CD into your CD-ROM drive. The installation wizard opens to the **Welcome to the InstallShield Wizard for HEAT** dialog box.

---

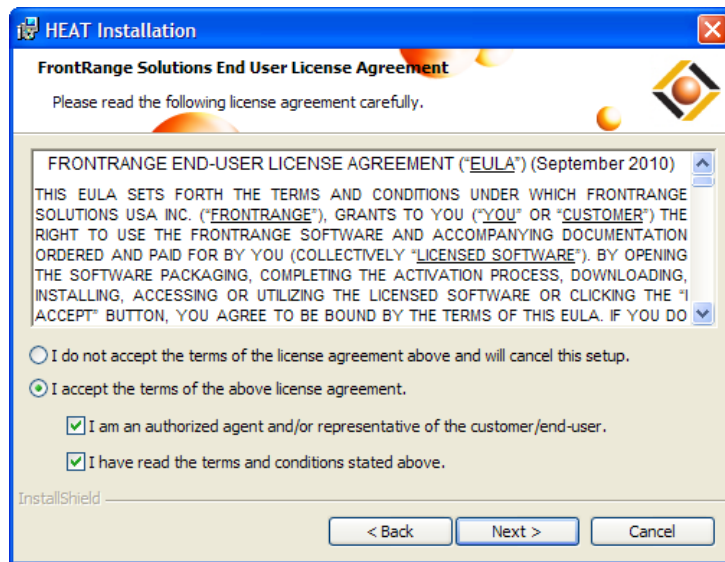
**Note:** The HEAT Installation CD is set up to autorun when inserted into your CD-ROM drive. If autorun is not enabled, select **Run** from the **Start** button on the Windows taskbar, and type: [X]\:setup.exe, where [X] is the letter of your CD-ROM drive.

---

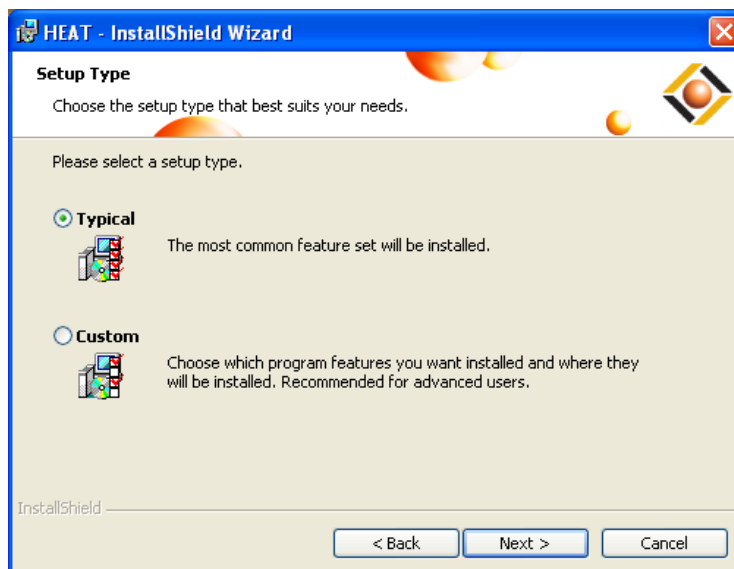


- 2 Click **Next**. The **FrontRange Solutions End-User License Agreement** dialog box opens.

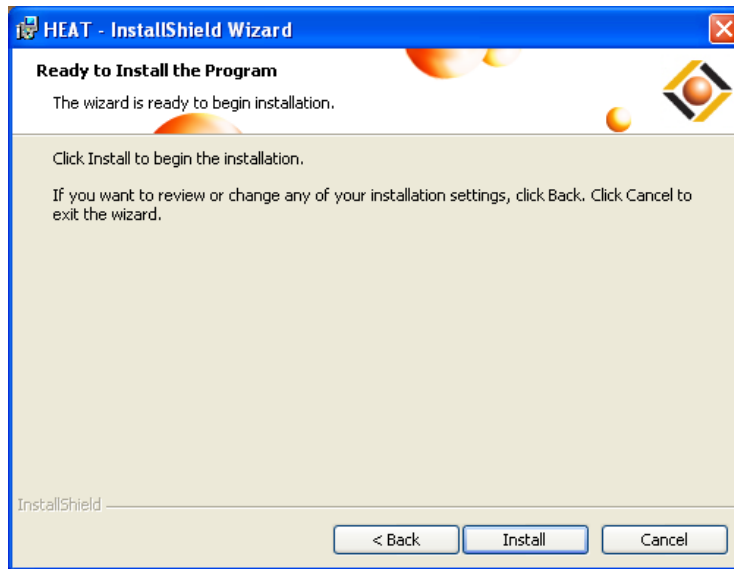




- 3 Review the licensing information and click the **I accept** radio button and check boxes if you agree to the terms.
- 4 Click **Next**. The **Setup Type** dialog box opens.



- 5 Select the **Typical** option, which installs Call Logging, Alert Monitor, and First Level Support, then click **Next**. The **Ready to Install the Program** dialog box opens.



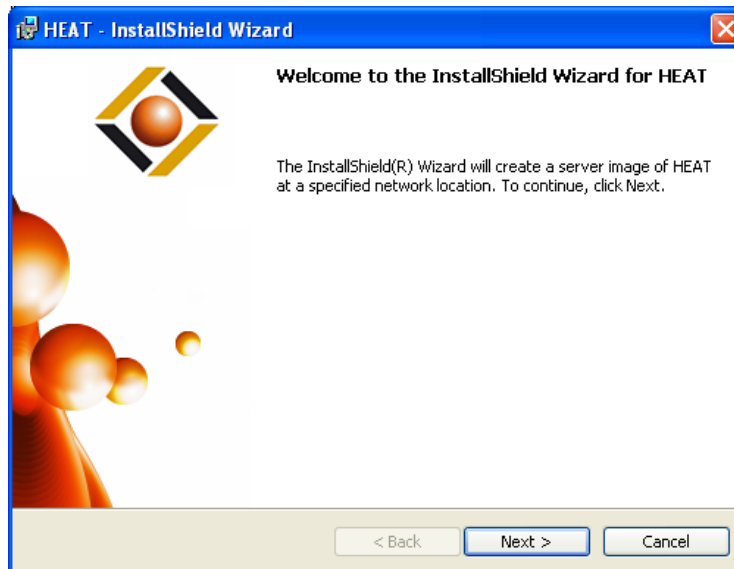
- 6 Click **Install**. When installation is complete, the **InstallShield Wizard Completed** dialog box opens. Click **Finish**.



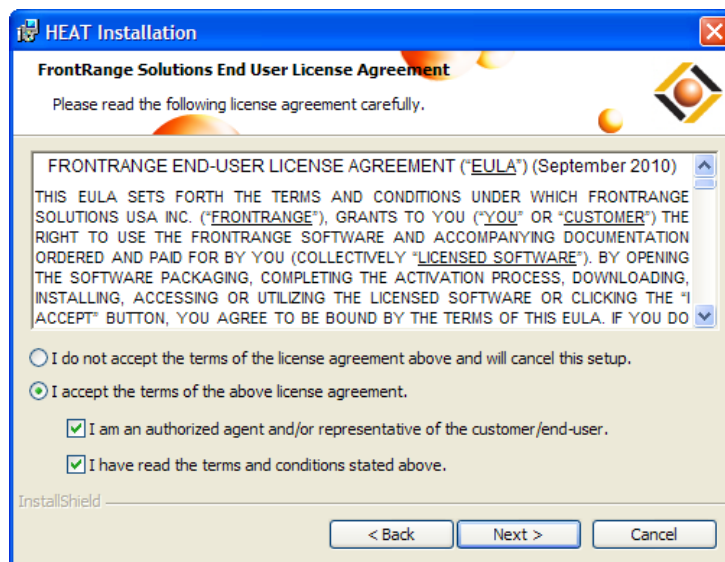
## Unattended End-User Installation

By default installs Incident Tracking option: Call Logging, Alert Monitor and First Level Support (FLS). Refer to [Appendix A, "Command-Line Options"](#) regarding information for installing additional heat modules.

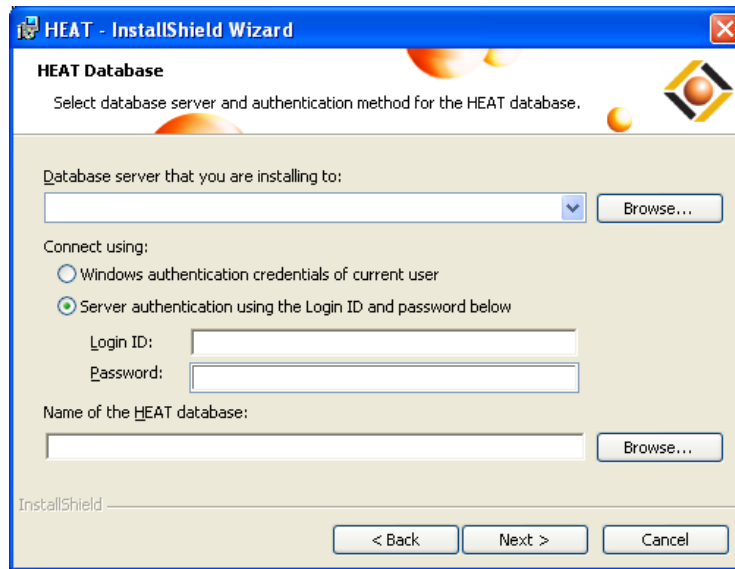
- 1 On the Windows Start menu, select **Start>Run**.
- 2 In the **Run** dialog box, type **[directory and path for HEAT.exe] /a** in the **Run** dialog box and click **OK**. The installation wizard opens to the **Welcome to the InstallShield Wizard** dialog box, indicating an image will be created and stored at the specified location.



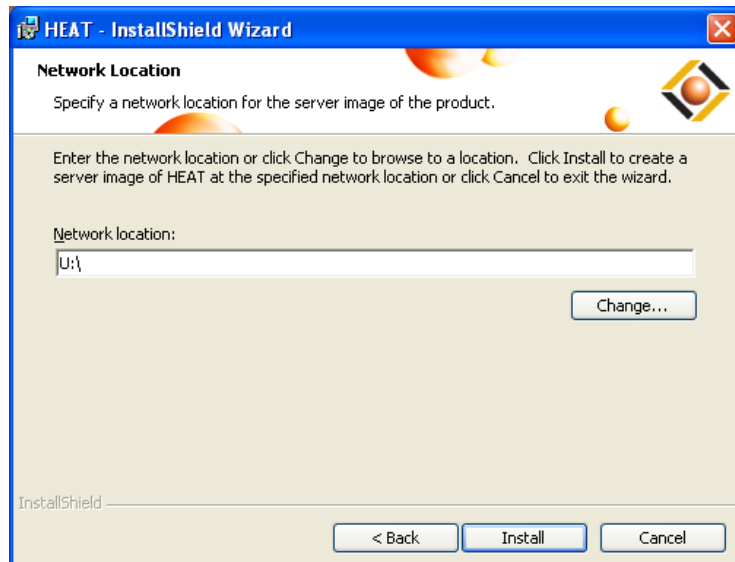
- 3 Click **Next**. The **FrontRange Solutions End-User License Agreement** dialog box opens.



- 4 Review the licensing information and click the **I accept** radio button and check boxes if you agree to the terms.
- 5 Click **Next**. The **HEAT Database** dialog box opens.



- 6 In the **Database server that you are installing to** field, type the computer name for the database server or click **Browse** to select from the list of database servers.
  - Specify the authentication method:
    - » Select Windows authentication.
    - » Specify the SQL Login ID and Password.
  - In the **Name of the HEAT database** field, type the database name or click **Browse** to locate and select the database.
- 7 Click **Next**. The **Network Location** dialog box opens.



- 8 Type the network location from which the end-users will access the HEAT.exe administrative image. Click **Install**. When installation is complete, the **InstallShield Wizard Completed** dialog box opens.
- 9 Click **Finish**. The administrative image, HEAT.exe, has now been copied to the specified network location.

**10** Convey location of HEAT.exe administrative image to the end-users and the procedure for running the unattended installation:

- In the Windows Start menu, select **Start>Run**, then type **[directory and path for HEAT.exe] / s /v"/qn"** in the **Run** dialog box.
- Click **OK**. This will initiate the unattended installation, installing Call Logging, Alert Monitor, and First Level Support (FLS) on the end-user workstation. If you want additional HEAT modules and components installed via the unattended installation, refer to [Appendix A, "Command-Line Options"](#) for command-line options and available properties.
- When installation is complete, end-users will see the HEAT shortcuts on the Windows **Start>Programs** menu.

## Post-Installation Configurations

After installing HEAT, two additional database configurations need to be performed:

- To complete the HEAT database configuration, you will need to create the ODBC data source, then initialize the HEAT database using the **.haf** file. This configuration presumes you have already created an empty database (also referred to as a database shell), and that database logon credentials have been created that includes rights to create tables. Refer to ["Complete the Database Configuration" on page 25](#).
- If you are using Web-based Call Logging and/or HEAT Self Service, several database settings need to be configured using the **Web Server DB Configuration Tool**. Refer to ["Web Server Database Configuration" on page 29](#).

---

**Note:** Administrator settings for Web-based Call Logging and HSS also need to be configured in another tool called **Web Server Configuration Tool**. Refer to ["HEAT Self Service Configuration" in the Administrator online help](#).

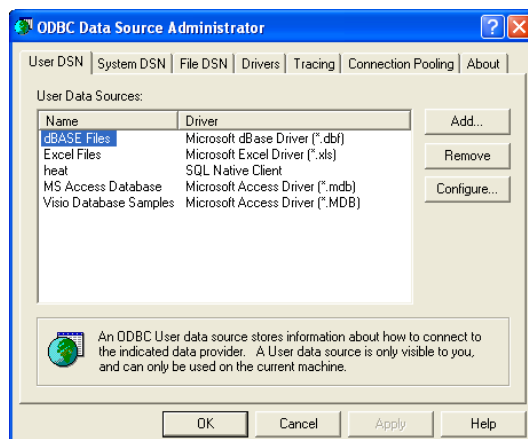
---

In addition, you can use the **Upgrade Assistance Utility** to facilitate and monitor client workstation upgrades. Refer to ["Upgrade Assistance Utility" on page 30](#).

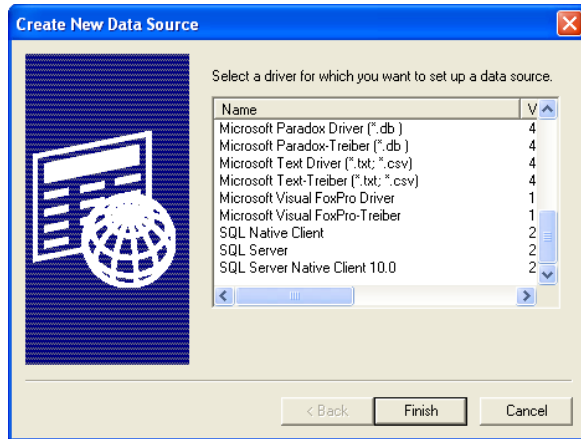
## Complete the Database Configuration

### ► Part 1: Create the ODBC Data Source

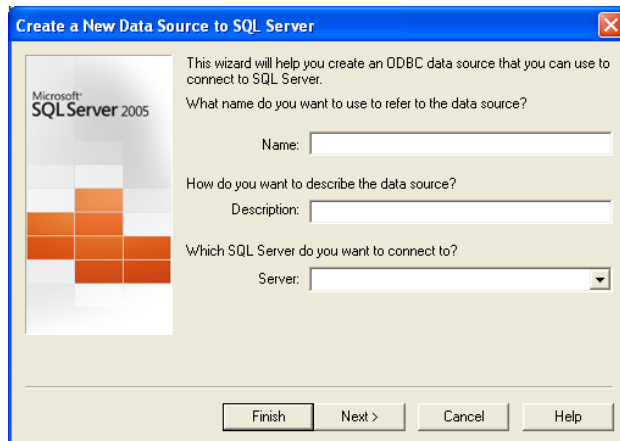
- 1** From the Windows **Start** menu, select **Settings>Control Panel>Administrative Tools>Data Sources (ODBC)**. The **ODBC Data Source Administrator** dialog box opens.



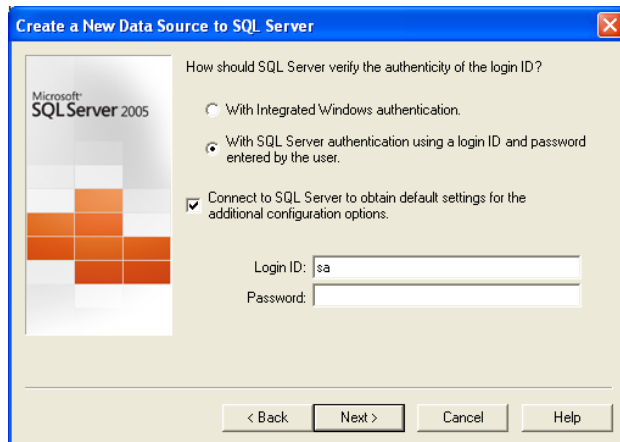
- 2 Click **Add**. The **Create New Data Source** dialog box opens.



- 3 In the **Create New Data Source** dialog box, select the driver for which you want to set up the data source:
- For SQL Server 2005, use the **SQL Server Native Client** driver.
  - For SQL Server 2008, use the **SQL Server Native Client 10.0** driver.
- 4 Click **Finish**.



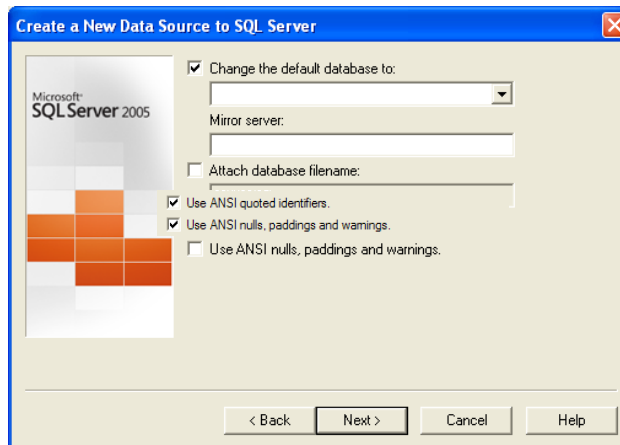
- 5 In the **Create a New Data Source to SQL Server** dialog box (screen shots reflect the **SQL Server Native Client** option), type a name for the data source in the **Name** field, type a description (optional), then select the server where the database shell is located. Click **Next**.



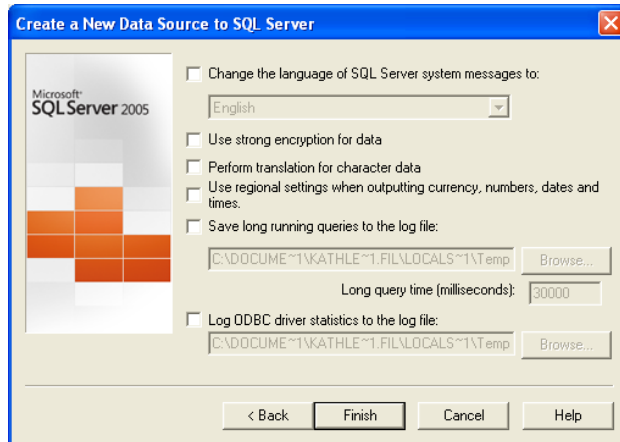
6 In the next dialog box, select how you want the SQL server to verify the login ID authenticity:

- Select the **With Integrated Windows authentication** option if you want to use Windows logon credentials to access the HMC storage database.
- Select the **With SQL Server Authentication using a login ID and password entered by the user** option if you want to specify the SQL Server database logon credentials. Then type the logon credentials for the SQL Server database in the **Login ID** and **Password** fields.

7 Click **Next**.



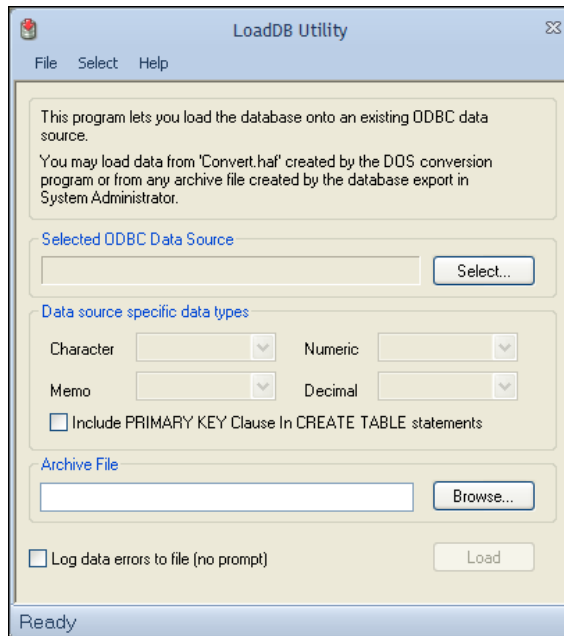
8 In the following dialog box, change the default database to the name of the database shell, and leave the default settings (ANSI options selected). Click **Next**.



9 In the final dialog box, deselect all options, then click **Finish**.

## ► Part 2: Initialize the HEAT Database Using the .haf File:

1 From the Windows **Start** menu, select **Programs>HEAT>Load HEAT**. The **LoadDB Utility** dialog box opens.



2 Click the **Select** button, select the data source created in Part 1, then click **OK**.

3 Click the **Browse** button to locate and select the **HEAT.haf** file (the default location is **C:\Program Files\HEAT\Starter Databases**), then click **OK**.

4 Click **Load**. Once the loading process is complete, you will be able to launch HEAT using the specified data source.



## Web Server Database Configuration

Use the **Web Server DB Configuration Tool** to set Web-based Call Logging and HEAT Self Service database parameters. These settings must be configured before using Web-based Call Logging and HSS.

**Note:** Administrator settings for Web-based Call Logging and HSS also need to be configured in another tool called **Web Server Configuration Tool**. Refer to "HEAT Self Service Configuration" in the Administrator online help.

### ► To Configure Database Settings:

- 1 To open this configuration tool, select **Start>Programs>HEAT>WEB Server DB Configuration Tool**. The **Web Server DB Configuration Tool** dialog box opens.

- 2 Select the database type: **Microsoft SQL Server** or **Oracle**. If you selected an Oracle database, the settings change, so you can omit steps 7 and 10 below.
- 3 Type the database **User Name** and **Password**.
- 4 In the **Data Input Mode** section, select the way you will configure the JDBC URL, either directly (**URL Direct Entry** option, for advanced users) or by entering information into the fields provided (**Field Entry** option).
- 5 If you selected **URL Direct Entry** in step 4, the **JDBC URL** field becomes active. Type the necessary information (such as instance name, port, etc.) directly into the **JDBC URL** field, then continue to step 7.
- 6 If you selected **Field Entry** in step 4, type the information into the fields provided. Notice the JDBC URL field is automatically edited.
  - Type the name of the host computer in the **Host** field.
  - For a SQL database, for a named instance, type the name.
  - In the **Port** field, specify the TCP/IP port.
  - For an Oracle database, type the database name in the **Service Name** field, then continue to step 7.

- For a SQL database, type the name of the database in the **DB** field.
  - If you need to set additional parameters for the JDBC URL, type them in the **Additional Properties** field.
- 7 Click the **Test** button to test the connection to the database.
  - 8 Click **Save**, then click **Exit**.
  - 9 Restart the service: from the Windows menu, select **Start>Settings>Control Panel>Administrative Tools>Services**, then right-click **HEAT Web Service**, and click **Restart**.

---

**Note:** *While the HEAT Web Service is restarting, you may see a **Building Configuration** message when you attempt to log on to the Web Server Configuration Tool or Web-based Call Logging.*

---

## Upgrade Assistance Utility

This utility enables you to facilitate and monitor client workstation upgrades when upgrading from HEAT 9.5.0.

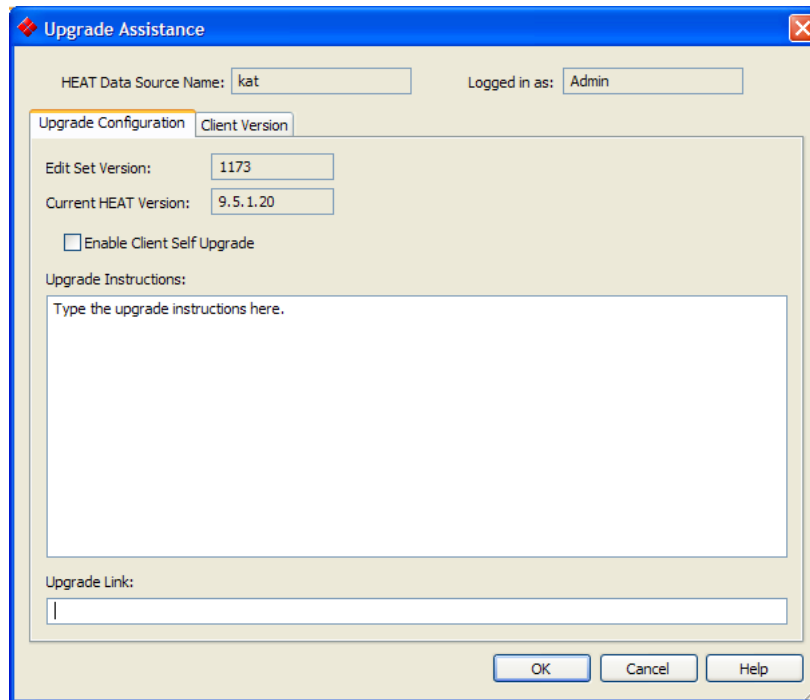
### Facilitate Client Upgrade

Use the Upgrade Assistance utility to send HEAT upgrade instructions to users of Call Logging, Alert Monitor, HEAT Messaging Center, and Business Rule Editor. When users log on, the **HEAT Version Upgrade Required** dialog box opens, containing the instructions you type into the Upgrade Assistance utility. You can even provide a link to the location from which users can initiate the upgrade.

#### ► To Configure the Upgrade Message:

Use the Upgrade Assistance utility to facilitate the upgrade process for client workstations:

- 1 From the **Start** button on the Windows taskbar, select **Programs>HEAT>Upgrade Assistance**.
- 2 The **HEAT Service & Support Data Source** dialog box opens. Specify the data source to use. Select **Automatically use this Data Source in the future** if you want to always use the designated data source. Click **OK**.
- 3 Type your User ID and Password, then click **OK**. The **Upgrade Assistance** dialog box opens.



- 4 On the **Upgrade Configuration** tab, you can see both the Edit Set version and the current HEAT version.

Select the **Enable Client Self Upgrade** check box; this triggers the system to display the **HEAT Version Upgrade Required** dialog box to users of Call Logging, Alert Monitor, HEAT Messaging Center, and Business Rule Editor, after the user logs on.

---

**Note:** *If you do not select the **Enable Client Self Upgrade** check box, when users log in, they will still see the message indicating the database requires a later version of the software, when applicable.*

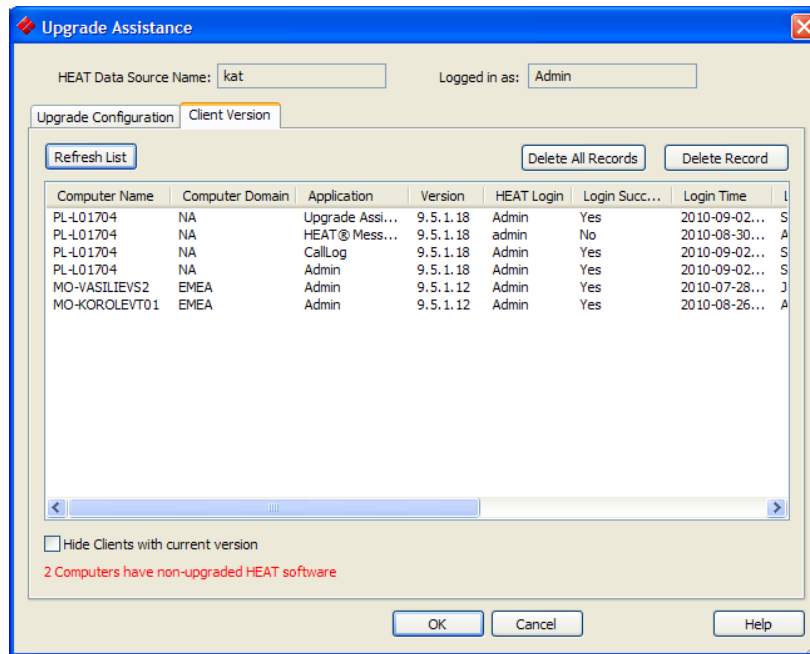
---

- 5 In the **Upgrade Instructions** text box, type the upgrade instructions for the user, which will display in the **HEAT Version Upgrade Required** dialog box.
- 6 In the **Upgrade Link** field, type the link the user will click to perform the upgrade (Web address, shared folder location, etc.).
- 7 Click **OK**.

## Monitor Upgrade status

Use the Upgrade Assistance utility to monitor the upgrade process.

- 1 From the **Start** button on the Windows taskbar, select **Programs>HEAT>Upgrade Assistance**.
- 2 The **HEAT Service & Support Data Source** dialog box opens. Specify the data source to use. Select **Automatically use this Data Source in the future** if you want to always use the designated data source. Click **OK**.
- 3 Type your User ID and Password, then click **OK**. The **Upgrade Assistance** dialog box opens.
- 4 Click the **Client Version** tab, which contains a list of client computer logins (failed or successful).



- 5 Click the **Refresh List** button to view the latest client workstation information, including:
  - Computer Name
  - Computer Domain
  - Application
  - Version (the current version of the application on that computer)
  - HEAT Login (login ID)
  - Login Success
  - Login Time
  - Login Server Time
  - Logout Time
  - User Name
  - User Domain
  - HEAT Time Zone Offset
  - System Time Zone Offset
- 6 A message at the bottom of the dialog box specifies the number of computers that have not yet been upgraded. Select the **Hide Clients with current version** to view only the non-compliant client computers.
- 7 You can also remove records or all records from the list:
  - Select a record (or select multiple records by pressing the **Ctrl** key as you select), then click **Delete Record**.
  - Click **Delete All Records** to remove all records.
- 8 Close the dialog box (you do not need to click **OK** to save the record deletion).



## Command-Line Options

---

The following information lists the command-line options for HEAT.exe. You can set one or more properties on the command line after any switches.

### Options

- **/q[n|b|r|f]**

The **/q** option sets the user-interface level in conjunction with the following parameters:

- » **q**, **qn** - No user interface.
- » **qb** - Basic user interface
- » **qr** - Reduced user interface with a modal dialog box displayed at the end of the installation.
- » **qf** - Full user interface with a modal dialog box displayed at the end of the installation.
- » **qn+** - No user interface except for a modal dialog box displayed at the end of the installation.
- » **qb+** - Basic user interface with a modal dialog box displayed at the end of the installation.

- **/a     Package**

Creates an image, referred to as an administrative image, that is installed on the network. Refer to ["Unattended End-User Installation" on page 23](#).

- **/s     Silent Mode**

The command **HEAT.exe /s** runs the installation in silent mode.

The command **HEAT.exe /s** also suppresses the HEAT.exe initialization window for a Basic MSI installation program (HEAT installation utilizes InstallShield and MSI technology), but it does not read a response file. To run a Basic MSI product silently, run the command line **HEAT.exe /s /v"/qn"** (to specify the values of public properties for a silent Basic MSI installation, you can use a command such as **HEAT.exe /s /v"/qn INSTALLDIR=D:\Destination"**).

---

**Note:** For some newer operating systems, you may need to use **/silent**.

---

- **/v     Pass arguments to msixec**

Used to pass command-line options and values of public properties through to msixec.exe (a Microsoft program that interprets packages and installs products).

- **/x     Uninstall**

The command **HEAT.exe /x** uninstalls HEAT (you can append **/s** or **/silent** to perform a silent uninstall).

## Available Properties

### **ADDLOCAL=**

The **ADDLOCAL=** command is followed by a comma-delimited list of properties, including one or more of the following:

- **ALL** - Installs all available HEAT modules.
- **COM** - Installs common components, such as KBConnector, Crystal Reports, Microsoft .NET, etc. This property must also be specified when using other properties, unless the **ALL** property is used.
- **TOOLS** - Installs Administrator and the Load HEAT utility.
- **TRACK** - Installs Call Logging, Alert Monitor, and First Level Support (FLS).
- **BRE** - Installs the Business Rule Editor.
- **Answer\_Wizard** - Installs the Answer Wizard.
- **Managers\_Console** - Installs the Manager's Console.

## Examples

Below are command line examples utilizing some of the parameters and properties listed above:

### **HEAT.exe /a**

Creates and saves an image (HEAT.exe) to a network drive to enable an unattended installation by the end user, which runs the installation wizard but all fields are filled with the values the administrator specified during the creation of the image.

### **HEAT.exe /s /v"/qn"**

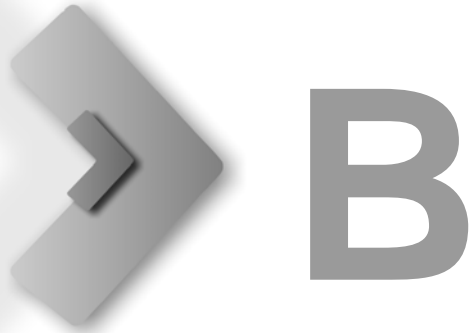
Used by the end-user to run a silent or unattended installation of the image created by the administrator; does not show any GUI and installs content according to the values specified by the administrator during the creation of the image. The default installation is Call Logging, Alert Monitor, and FLS; other properties can be specified to install additional HEAT modules and components.

### **HEAT.exe /v"ADDLOCAL=COM,TOOLS INSTALLDIR=C:\HEAT"**

Runs the installation wizard with some fields filled with the values the administrator specified during creation of the image; other fields (properties to install and the target directory) are filled with values typed in the command line.

### **HEAT.exe /s /v"/qn ADDLOCAL=COM,TOOLS INSTALLDIR=C:\HEAT"**

Runs a silent or unattended installation; does not show any GUI and installs content with some fields filled with the values the administrator specified during creation of the image; other fields (properties to install and the target directory) are filled with values typed in the command line.



## Resources

---

### Additional Documentation

In addition to this guide, the following resources are available to provide you with information about HEAT:

- **Online Help** - Accessed by clicking the Help menu option and Help buttons in the Call Logging or Administrator module, and the Help icon in Web-based Call Logging, online help provides topic overviews and step-by-step instructions to walk you through basic tasks, in addition to a comprehensive table of contents, index, and search function.
- **HEAT User Guide** - Provides call takers with the information and procedures needed to track and resolve your organization's important issues in Call Logging.
- **HEAT Administrator Guide** - Provides administrators with the information necessary to configure HEAT settings and defaults, including HEAT Messaging Center (HMC), HEAT Survey, and HEAT Self Service configurations.

---

**Note:** Guides are available in PDF format from the Installation CD-ROM or from <http://www.frontrange.com/Support/> for maintenance customers.

---

- **HEAT Plus Knowledge Installation Guide** - Provides the information needed to install HPK, including system requirements, installation wizard procedure, and the HPK database schema.
- **Upgrading Your HEAT System** - Provides steps for upgrading an existing HEAT system; located at the support site indicated below, for maintenance customers.
- **Training Courses** - Information regarding training courses for FrontRange Solutions family of products can be found at:

<http://frontrange.learn.com>

## Contact Us

### Support Site

FrontRange Solutions can answer your technical support questions about HEAT, Foundation/ITSM and GMEE, GoldMine, and other FrontRange product families. Visit:

<http://www.frontrange.com/Support/>

### Contact Information

#### **FrontRange Solutions Worldwide Headquarters**

5675 Gibraltar Drive

Pleasanton, CA 94588 USA

TEL: 800.776.7889 and +1 925.398.1800

If calling from Canada, dial: 1.888.603.3270

Offices are also located in Latin America, Asia Pacific, Europe, and South Africa. For international contact information, go to the FrontRange Solutions Web site, click the **Contact** link at the top of the page, then click the **Offices** tab.