What's New in HEAT 8.0

FrontRange SOLUTIONS™

HEAT®

Service & Support™

VERSION 8.0

10/03

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Introduction

Welcome to HEAT 8.0

Welcome to HEAT 8.0. HEAT 8.0 offers a number of new features and enhancements designed to help you track and manage your important data. Extensive user interface changes, new Call Logging Customer Group capabilities, and greatly improved Business Process Automation Module functionality represent the array of helpful new features you can look forward to using in HEAT 8.0.

About this Manual

The *What's New in HEAT 8.0* manual describes commands and features relevant to the latest release of HEAT Service & Support.

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 

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

Contact Us

Our Support Site

Do you have a technical question about HEAT or GoldMine products?

FrontRange Solutions Support is there to answer your questions and make sure you get the help you need. Visit:

support.frontrange.com

Select the appropriate section on the navigation bar for quick solutions to technical issues.

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Corporate Headquarters:

FrontRange Solutions Inc.

(a Delaware corporation)

1150 Kelly Johnson Blvd.

Colorado Springs, CO 80920

TEL: 800.776.7889 and +1 719.531.5007

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CHAPTER ONE

1

What's New in HEAT 8.0

User Interface Enhancements

The HEAT 8.0 suite introduces an entirely new user interface (UI), designed to be more efficient and modern. Enhancements include:

- Updated look and feel for toolbars, wizards, dialog boxes, forms, tabs, and more
- Themes
- Enhanced **About** dialog boxes
- Data source name in status bars

Updated Look and Feel

Toolbar buttons, wizards, dialog boxes, forms, tabs, and more were updated to reflect a more modern look and feel. Call Record and Customer Record tabs now display the number of records contained on each. Drop-down lists were updated to support images to the left of included items. What's more, you can now display custom images on the buttons assigned to AutoTasks, Call Groups, and reports.

For more information on displaying custom images on AutoTasks, Call Groups, and report toolbar buttons, see "Form and Toolbar Improvements" on page 1-4.

Also, you can now dock most toolbars and menu bars to any side of a module's main window simply by dragging the object.

A portion of the Call Logging Toolbar with new button icons:

Themes

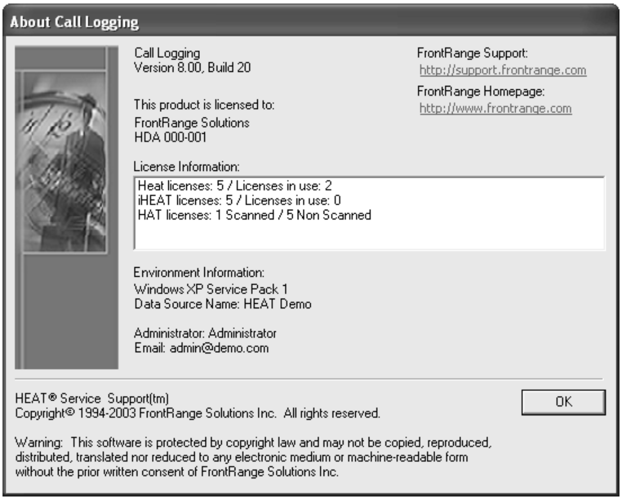
Several themes are now available in HEAT. Themes allow you to customize your UI by setting colors, backgrounds, menu bar options, and more. For example, you can choose the HEAT 2003 theme to display HEAT using rounded windows and shaded drop-down lists.

Set your HEAT theme in Call Logging using the Customize (toolbar) dialog box's new Themes tab (access this dialog box by clicking the down arrow on the toolbar and selecting **Customize**). The theme is activated for the entire HEAT suite.

Enhanced About Dialog Boxes

New information is presented in the HEAT About dialog boxes, accessed by selecting **Help>>About** from the main menu bar in any HEAT module.

The About Call Logging dialog box:



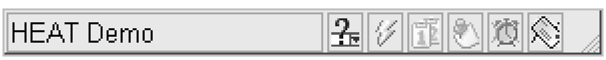
Enhancements to these dialog boxes include:

- An improved layout
- Licensed products that now display, as well as the version information
- Environment information that now displays, including the operating system and the current HEAT data source
- URL links to the FrontRange Solutions Home page and Support site are now listed

Data Source Name in Status Bar

The data source you are currently using now appears in the status bar of each module. This helps you immediately identify your data source.

Example of the HEAT Demo data source name displayed in the Call Logging status bar:



Form and Toolbar Improvements

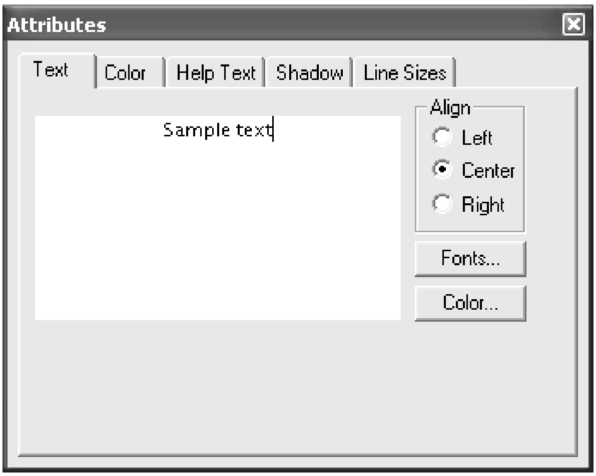
Several form and toolbar improvements were made in this release, allowing you to enrich the usability and aesthetics of your system. Improvements include:

- New Attributes dialog box
- Custom images on buttons and forms
- Form control enhancements

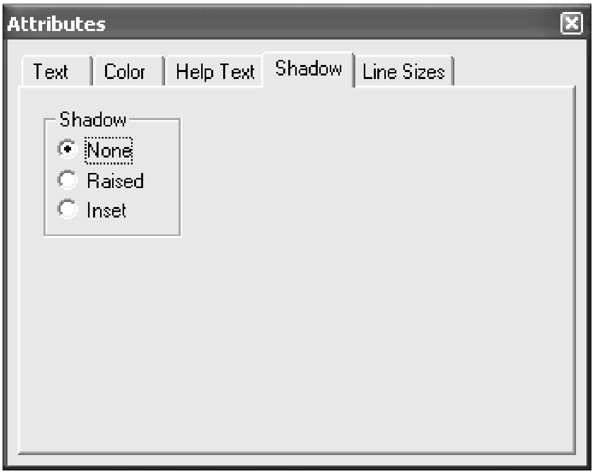
New Attributes Dialog Box

The new Attributes dialog box in the Administrator module allows you to customize form controls in a more efficient manner. Previously, attributes were defined using the Form Editor toolbar and menu bar. Now you can define control attributes by right-clicking on a form control and selecting "Attributes." This launches the Attributes dialog box, where you can customize the control using a variety of tabs. Tabs and attributes vary by control and may include any combination of the following:

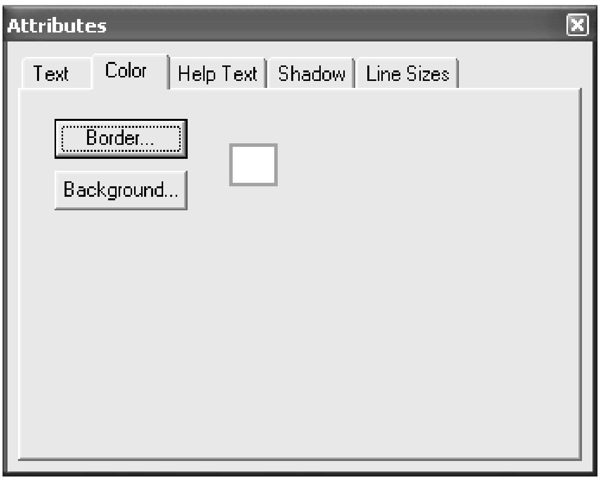
- **Text:** Use this tab to align the text on controls and to define fonts and colors. For certain controls, you can also use this tab to dynamically change colors and text.



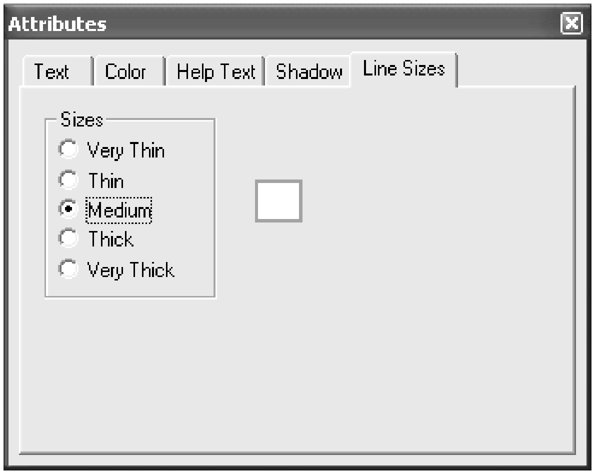
- **Shadow:** Use this tab to define the shadow bordering a control.



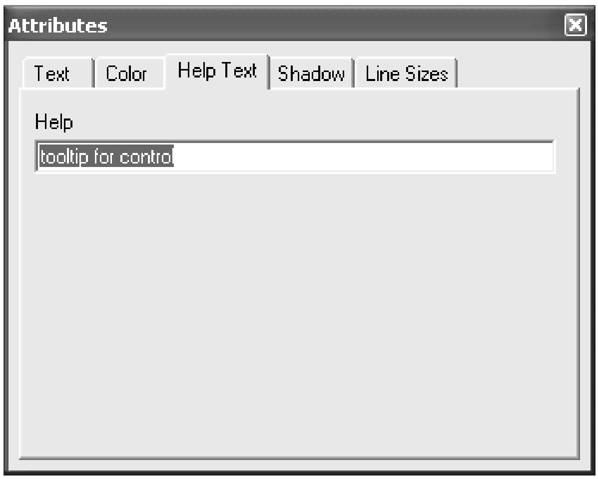
- **Color:** Use this tab to define a control's border and background color.



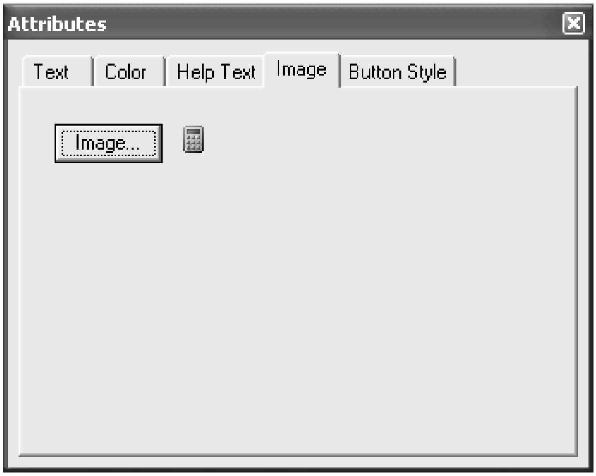
- **Line Sizes:** Use this tab to define line widths.



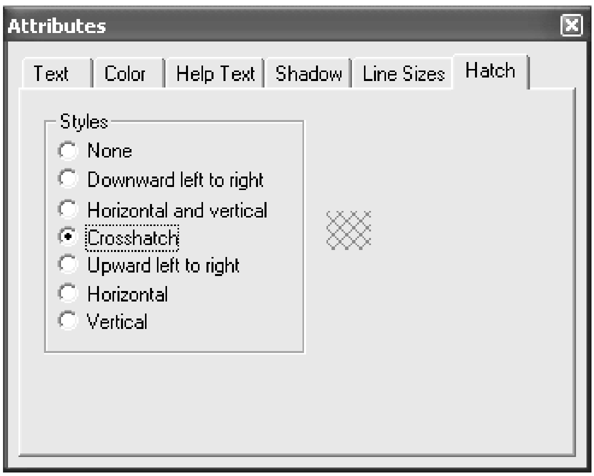
- **Help Text:** Use this tab to define the help text (often called a tooltip) that appears in the status bar when the user mouses over the control.



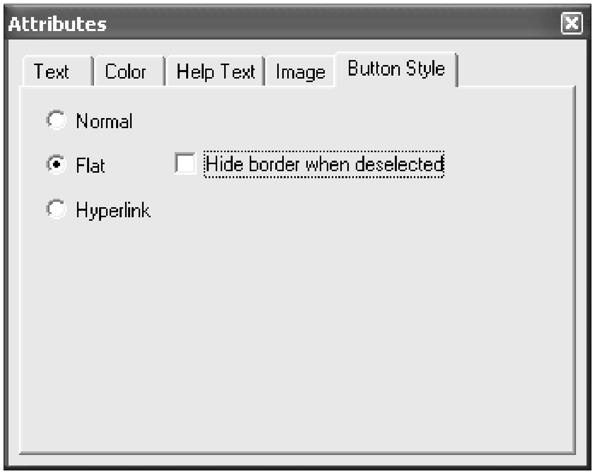
- **Image:** Use this tab to define which image appears on a control (Command Button and Image controls only).



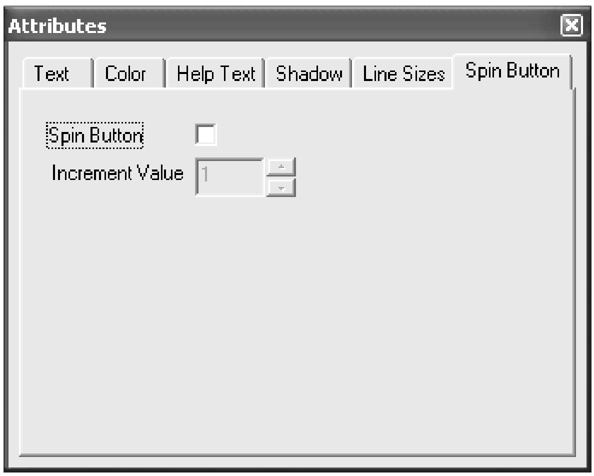
- **Hatch:** Use this tab to define the pattern on a control (Static Text Box control only).



- **Button style:** Use this tab to define the style of a command button.



- **Spin button:** Use this tab to define whether or not a spinner arrow is available in the control (Number Box control only).



Note: Most of these control attributes were previously available in HEAT. However, several new attributes were added in this release.

For more information on new control attributes, see "Form and Toolbar Improvements" on page 1-4 and "Form Control Enhancements" on page 1-9.

Custom Images

You can now place custom images, as well as stock images, on:

- AutoTask toolbar buttons
- Call Group toolbar buttons
- Report Shortcut toolbar buttons
- Command buttons
- Forms

Note: You can also place custom images on Customer Group toolbar buttons. Customer Groups are new to this release. For more information, see "Customer Groups" on page 1-27.

Custom images help facilitate the navigation and aesthetics of your system. HEAT accepts bitmaps (.bmp) or icon (.ico) images. HEAT also supports transparency. That is, if a graphic has a transparent area, colors or objects beneath can "show through."

Tip:
Custom images are limited to 45 KB.

Manage your custom images using the Select Image dialog box's new Custom tab. Use this tab to add custom images to your library, remove custom images from your library, and to place custom images on buttons and forms.

Note: Users must possess the appropriate security right ("Custom Image Import") to add and remove custom images. For more information on security rights, see Administrator online Help.

Form Control Enhancements

Numerous enhancements were made to HEAT's form controls, allowing you to significantly increase the usability of your forms. Enhancements include:

- **Spin button options:** Use this attribute to define whether or not a control (numeric field only) displays spin arrows  to increment a value.
- **Underlined text:** Use this attribute to underline text on controls.

- **Hyperlink command button:** Use this attribute to make a command button look like a hyperlink: flat, borderless, and underlined.
- **Borderless command buttons:** Use this attribute to remove the frame around a normal (raised 3-D look) or flat command button.
- **Help text on command buttons:** Use this attribute to define the help text that appears when the user "mouses over" a command button. The help text appears in the status bar.
- **Ability to tab to and activate command buttons:** Use this attribute to include command buttons in your tab order for forms. When a user tabs to a command button and presses ENTER or the space bar, the button activates.
- **Ability to dynamically change text on command buttons and labels:** Use this attribute to dynamically change the text on a command button or label (called a Static Text box) using the value from another text field on the same form. For example, you can use this feature to change the text on a command button from "Suspend Call" to "Resume Call" after it is clicked.
- **Ability to dynamically change font color on command buttons and labels:** Use this attribute to dynamically change the font color on a command button or label (called a Static Text box) when a condition in another field on the form is met. For example, you can display all high-priority issues in red text.

Note: Set these attributes using the new Attributes dialog box in the Administrator module.

For more information on the Attributes dialog box, see "New Attributes Dialog Box" on page 1-4.

AutoTask Enhancements

HEAT has added several new features and improvements to AutoTasks. Enhancements include:

- Importing and exporting AutoTasks
- New AutoTask actions
- New customer-specific AutoTask actions
- Relocation of Insert Function command
- New and improved @Functions
- New confirmation dialog box
- New AutoTask description field
- New AutoTask menu on Customer Record

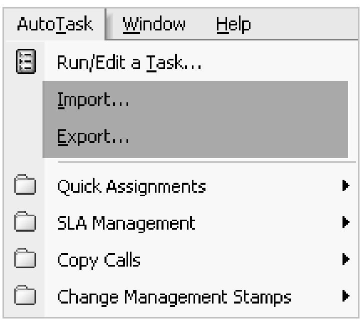
Note: For more information on the new AutoTask menu, see "New AutoTask Menu" on page 1-24.

Importing and Exporting AutoTasks

You can now import and export AutoTasks so that you can share AutoTasks between systems. An AutoTask is exported to an .hef format.

Note: Use this feature to create and test AutoTasks on a test system before implementing them in a live system.

Import and export AutoTasks using the new Import and Export commands on the AutoTask menu:



New AutoTask Actions

Two new AutoTask actions are available in this release of HEAT. New actions include:

- **Send a Broadcast:** Use this action to send a HEAT Broadcast message and, if you choose, an attached Call Record to every person in your Mail Group. The Broadcast message pops up on every user's screen.

Note: In the case that there is no active Call Record to attach, the AutoTask ignores the attach command and continues with the other actions defined in the AutoTask.

- **If Statement:** Use this action to add an "if statement" to conditionally execute other AutoTasks. For example, you can use an If Statement to stop your SLA clock (run Stop Clock AutoTask) if a call is suspended (status = "suspended").

HEAT has also added several new AutoTask actions specific to Customer Groups. For more information on these actions, see "New Customer-Specific AutoTask Actions" on page 1-12.

For more information on Customer Groups, see "Customer Groups" on page 1-27.

New Customer-Specific AutoTask Actions

HEAT has added several customer- specific AutoTask actions. They include:

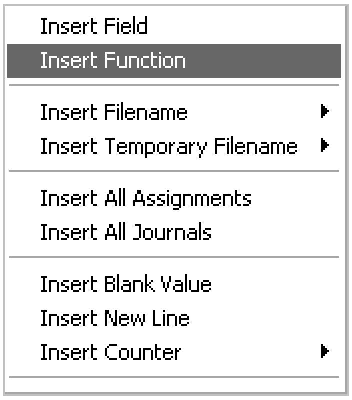
- **Create Profile:** Creates a new Profile record.
- **Update Profile:** Updates an existing Profile record by appending or completing fields.
- **Create Contact:** Creates a new Contact record.
- **Update Contact:** Updates an existing Contact record by appending or completing fields.
- **Create Configuration:** Creates a new Config record.

- **Update Configuration:** Updates an existing Config record by appending or completing fields.
- **Create Customer Login:** Creates a new Customer Login ID.
- **Update Customer Login:** Updates a Customer Login ID.

Relocation of Insert Function Command

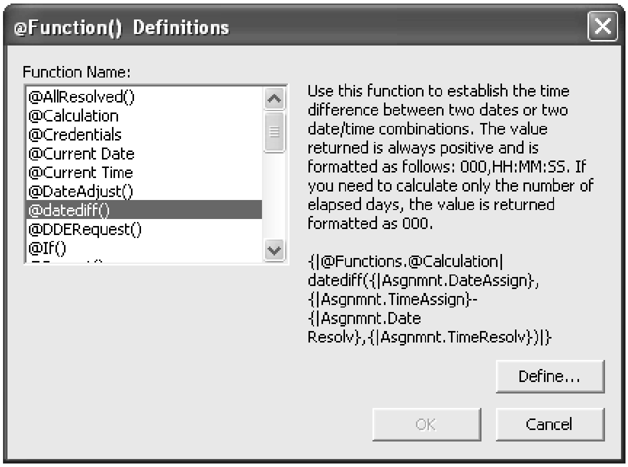
The Insert Function command was promoted to the Insert menu. As a result, you no longer have to drill down through the Insert Field option to get to the Insert Function item.

The Insert Menu featuring the new Insert Function item:



The @Function Definition dialog box also has a new look. It now displays the @Functions available for your use, as well as descriptions of the @Functions and a Define button for specifying parameters and for the @Function statements.

The @Function Definitions dialog box:



New and Improved @Functions

Several new @Functions and five improved @Functions appear in this release:

- @Calculation
- @If (New)
- @Role (New)
- @Team (New)
- @SumAssignments (New)
- @SumJournals (New)
- @datediff
- @timediff
- @DateAdjust
- @TimeAdjust

Note: Each of these @Functions is discussed on the following pages.

The @Calculation Function

The @Calculation function was modified so that it can now use the Stopwatch field to calculate durations. The @Function now recognizes the Stopwatch field value as a measure of hours and minutes, and can translate that into a meaningful decimal and back to a time value again to calculate durations.

The @If Function

The new @If function incorporates into an AutoTask the ability to evaluate a statement (or value) as true or false. Use this @Function to conditionally fill in a field. If the statement is recognized as true, one value can be placed in a field; if false, another value can be placed in the field.

Example: Use the @If function in an Update Call action to populate the Priority field with a value of **3** if the SLA class is **Gold**. Otherwise, populate the field with a priority of **4**.

```
If: {|Profile.SLAClass}==Gold
True Response: 3
False Response: 4
```

Note: The @If function does not support AND, OR, or BRACKET functionality. As a result, you cannot evaluate multiple statements.

The @Role Function

The new @Role function inserts the role of the person currently logged on to the system.

Use this @Function in an AutoTask to incorporate a method for checking the role of the current user. This allows you to limit who can execute an AutoTask based on role.

Example: Use the @Role function to forbid users with the role of “tracker” to resolve assignments:

```
If: {|@Functions.@Role()}==Tracker
True Response: “Sorry, you are assigned a role
of ‘tracker’ and are not allowed to resolve
Assignments.”
False Response: “Assignment-Resolved.”
```

Note: The @Role function is used primarily in conjunction with the @If function in an Update or Create Call AutoTask action.

The @Team Function

The new @Team function inserts the team (or teams) of the person currently logged on to the system.

Use this @Function in an AutoTask to incorporate a method for checking the team (or teams) of the current user. This allows you to limit who can execute an AutoTask based on team.

Note: Remember, a user can be a member of multiple teams; if you limit an AutoTask based on a team, only the team being "checked" is considered in the AutoTask argument.

Example: Use the @Team function to forbid users on the "hardware tech" team to create new Customer Records:

```
If: {|@Functions.@Team()}==Hardware Techs
True Response: "As a member of the hardware
techs team, you are not allowed to create a new
company profile."
False Response: Create a new Company Profile.
```

Note: The @Team function is used primarily in conjunction with the @If function in an Update or Create Call AutoTask action.

The @SumAssignments Function

The @SumAssignments function allows you to calculate the sum of numeric values located in a specified Assignment field. For example, you can use this @Function to calculate the total time it takes to resolve all assignments for a selected Call Record.

In most cases you will evaluate a Numeric field, such as a "Time Spent" field.

The @SumJournals Function

The @SumJournals function allows you to calculate the sum of numeric values located in a specified Journal field. For example, you can use this @Function to calculate the total time it takes to complete all journals for a selected Call Record.

In most cases, you will evaluate a Numeric field, such as a "Time Spent" field.

The @datediff Function

The @datediff function (which calculates the difference between two date/time pairs or two dates) now uses a template for assembling arguments. The template contains fields for entering the basic parameters: Start Date, Start Time, End Date, and End Time. This greatly reduces the possibility for syntax errors.

What's more, the @datediff function now supports Hours of Operation so that you can apply your company's calendar to the @Function.

Note: Previously, this option was located under the @Calculation function. It now resides at the same level as all other @Functions.

The @timediff Function

The @timediff function (which calculates the difference between two date/time pairs or two dates) now uses a template for assembling arguments. The template contains fields for entering the basic parameters: Start Date, Start Time, End Date, and End Time. This greatly reduces the possibility for syntax errors.

What's more, the @timediff function now supports Hours of Operation so that you can apply your company's calendar to the @Function.

Note: Previously, this option was located under the @Calculation function. It now resides at the same level as all other @Functions.

The @DateAdjust Function

The @DateAdjust function was expanded so that you can now:

- specify a database field or @Function value to adjust the offset time (you specify offset time and increment).
- specify the start date and time for the calculation.
- use Hours of Operation to apply your company's calendar to the @Function.

You can use this @Function to establish AutoTasks that have actions which cascade off of each other (for example, "Ten hours after an assignment is created, perform action X. Then, two hours after action X, perform action Y). You can also use this @Function to establish a negative offset (for example, two days before the assignment is due, send a notice).

The @TimeAdjust Function

The @TimeAdjust function was expanded so that you can now:

- specify a database field or @Function value to adjust the offset time (you specify offset time and increment).
- specify the start date and time for the calculation.
- use Hours of Operation to apply your company's calendar to the @Function.

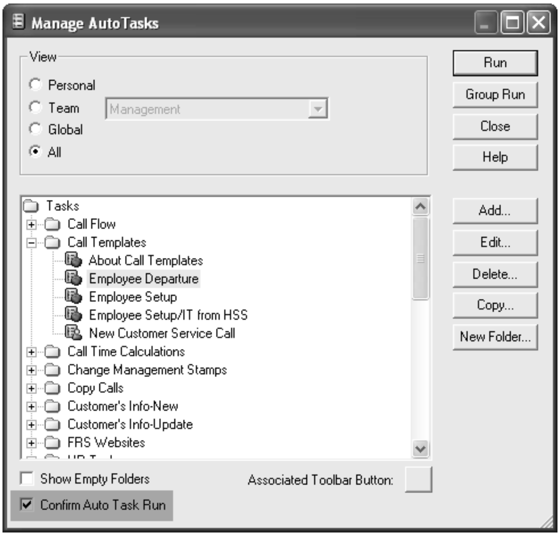
You can use this @Function to establish AutoTasks that have actions which cascade off of each other (for example, "Ten hours after an assignment is created, perform action X. Then, two hours after action X, perform action Y). You can also use this @Function to establish a negative offset (for example, two days before the assignment is due, send a notice).

Note: If the time adjustment goes past 12:00 A.M. or the end of the day as defined by your company calendar, the @Function rolls to the next day.

New Confirmation Dialog Box

You can now display a confirmation dialog box before an AutoTask is run. The confirmation dialog box makes sure you want to run the selected AutoTask, eliminating the possibility of running an AutoTask by mistake.

Enable the confirmation dialog box by selecting the new Confirm AutoTask Run check box on the Manage AutoTasks dialog box:



New AutoTask Description Field

You now have the ability to type a description for an AutoTask into a new Description field on the Add/ Edit Task dialog box. Use the description field (memo field) to thoroughly document the actions your AutoTask performs. If your AutoTask is globally available, doing so helps others determine whether or not the AutoTask is appropriate for them.

Customer Record Improvements

Several additions were made to Customer Records, extending the Call Logging application to an environment where customers, in additions to calls, can drive your business. Improvements include:

- Additions to the File Menu
- New Group Menu
- New AutoTask Menu
- New customer-specific AutoTask actions

For more information on customer-specific AutoTask actions, see "New Customer-Specific AutoTask Actions" on page 1-12.

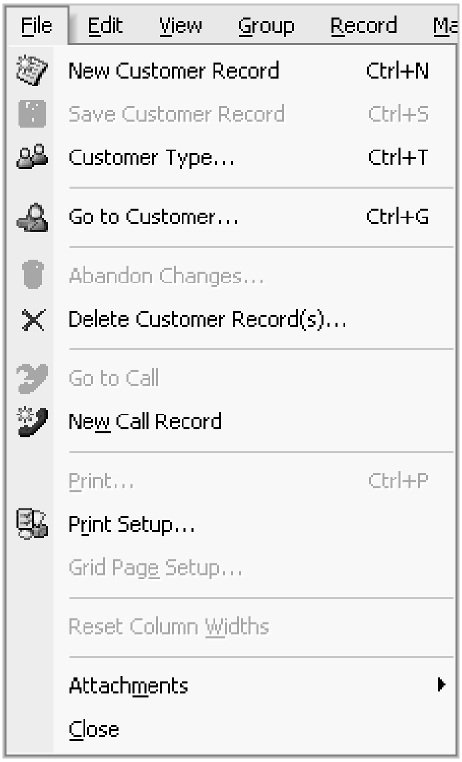
- New navigation buttons on Customer Record forms
- Customer Type shortcut available on Customer Record
- Customer Groups

For more information on Customer Groups, see "Customer Groups" on page 1-27.

Additions to the File Menu

The File menu on the Customer Record menu bar has new commands to expedite working with Customer Records.

The File Menu:



Menu items now include:

- **New Customer Record:** Creates a New Customer Record using the next available CustID number. You can also use the New Customer Record button on the toolbar.
- **Save Customer Record:** Saves the active Customer Record. You can also use the Save Customer Record button on the toolbar.

- **Customer Type:** Accesses the Customer Type dialog box where you can select the Customer Type for new Customer Records. This determines the type of record you will create (for example, Organization or Equipment).
- **Go to Customer:** Accesses the Go to Customer dialog box to search for a specific Customer Record based on Customer Type and CustID.
- **Abandon Changes:** Abandons changes you have made to the active, unsaved Customer Record.
- **Delete Customer Record:** Deletes the active Customer Record from the database.

CAUTION: Use caution when deleting a Customer Record. Deleting a Customer Record is permanent. The Customer Record must be recreated if you discover that it was deleted in error.

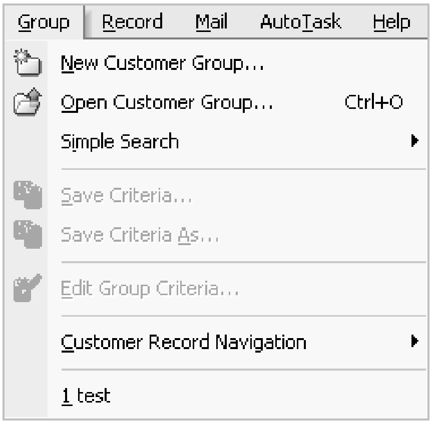
- **Go to Call:** Closes the Customer window and launches the Call Record for the active Call History record.
- **New Call Record:** Creates a new Call Record using the next available Call ID number.
- **Print:** Accesses the Print dialog box where you can access commands for printing the currently active grid.
- **Print Setup:** Accesses the Print Setup dialog box where you can define print options such as paper size, orientation, and so on.
- **Grid Page Setup:** Accesses the Grid Page Setup dialog box where you can define print options for printing the active grid.
- **Reset Column Widths:** Resets the column widths in grid view to their original settings.
- **Attachments:** Accesses the Profile Attachments dialog box where you can access commands to view, add, edit, and remove Profile attachments.
- **Close:** Closes the Customer window and returns you to the Call Record.

New Group Menu

A new Group menu was added to the menu bar in the Customer Record. This menu contains commands for building and opening Customer Groups, Simple Searching Customer Groups, and Customer Record navigation.

For detailed information on Customer Groups, see "Customer Groups" on page 1-27.

The new Group menu:



Menu items include:

- **New Customer Group:** Accesses the New Customer Group dialog box, where you can create a new Customer Group.
- **Open Customer Group:** Accesses the Open Customer Group dialog box, where you can open and/or run an existing Customer Group.
- **Simple Search:** Accesses the Simple Search shortcut menu, where you can run a Simple Search against a field.
- **Save Criteria:** Saves changes to the active Customer Group's search criteria.

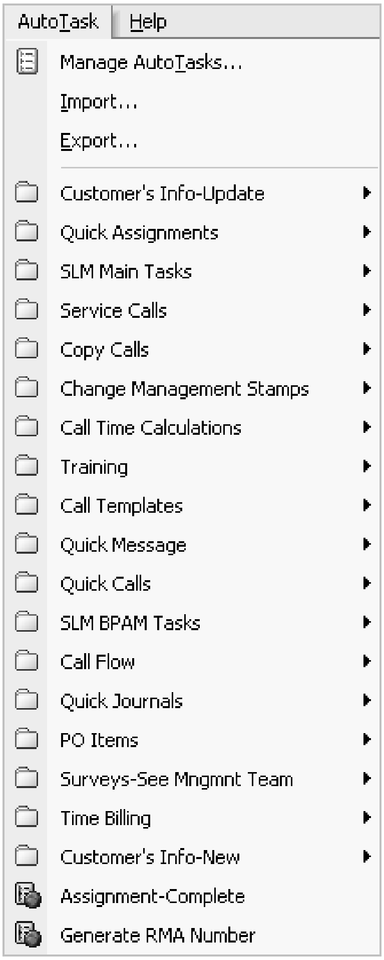
- **Save Criteria As:** Saves changes to the active Customer Group's search criteria under a new name so that the original Customer Group is not altered.
- **Edit Group Criteria:** Accesses the Edit Customer Group dialog box where you can modify an existing Customer Group's criteria.
- **Refresh Group:** Refreshes the active Customer Group. This menu command forces the system to re-query the database and update the group.
- **Customer Record Navigation:** Navigates through Customer Records. Accesses First, Previous, Next, and Last commands.

New AutoTask Menu

There is a new AutoTask menu on the menu bar in the Customer Record. Like the Call Record AutoTask menu, this menu allows you to open, create, run, and edit AutoTasks appropriate for Customer Records.

For detailed information on new customer-specific AutoTasks, see "New Customer-Specific AutoTask Actions" on page 1-12.

The new AutoTask menu:



Menu items include:

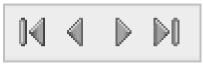
- **Manage AutoTasks:** Accesses the Manage AutoTasks dialog box where you can open, run, create, edit, and delete an AutoTask.
- **Import:** Accesses the Import AutoTask dialog box where you can import an AutoTask (in .hef format).
- **Export:** Accesses the Export dialog box where you can export an existing AutoTask to a .hef file.

Note: Importing and exporting are new to this release.

For detailed information on importing and exporting AutoTasks, see "Importing and Exporting AutoTasks" on page 1-11.

Note: The AutoTask menu is highly customizable (that is, you can create AutoTasks and folders to display here). As a result, your AutoTask menu may differ from what we document.

Navigation Buttons on Customer Record Forms



An additional set of navigation buttons now appears at the bottom of a Customer Record. These buttons allow you to flip through sequential Contacts, Configurations, and Call Histories respective to the record that is currently active. Additionally, you can go to the first or last Contact, Configuration, or Call History entry by using the terminal keys on the far right and far left of the set.

Customer Type Shortcut Available on Customer Record

The CTRL+T shortcut is now available on the Customer Record. This action calls up the Customer Type dialog box from which you can choose a new Customer Type.

Additionally, when you have a Customer Group open, you can press CTRL+T to change only the Customer Type and retain all of the other search criteria. For example, if your Customer Group consists of companies located in Colorado Springs with an SLA Class of Silver, you could change the Customer Type to Employee and retain the criteria of Colorado Springs and SLA Class Silver.

Customer Groups

This release of HEAT introduces Customer Groups. Like Call Groups, Customer Groups allow you to "group" records (in this case, Customer Records) according to similarities or some other desirable criteria. For example, you can create a Customer Group to open all Customer Records for those living in Colorado Springs.

Creating a group allows you to search for records very quickly. You can also run AutoTasks against groups.

You define the criteria for a Customer Group using one of the following:

- **Simple Search:** One expression (for example, all customers living in Colorado Springs; expression is `City = Colorado Springs`).
- **Boolean Search:** Multiple expressions (for example, all "Gold" customers living in Colorado Springs; expressions are `City = Colorado Springs AND SLA = Gold`)

IMPORTANT: The application architecture mandates that Customer Groups only contain Customer Records of the same Customer Type.

Notes:

- HEAT provides several predefined Customer Groups. You can use these groups, edit them, delete them, or create your own.
- You can also use an @Function to insert a continually changing variable, such as the current date, into an expression.

For detailed information on @Functions, see Call Logging online Help.

Creating Customer Groups Using a Simple Search

You can create a Customer Group using a Simple Search. A Simple Search queries your Customer Records looking for all records that meet a single expression.

When you create a Customer Group using a Simple Search, you select the field you want to query from the Simple Search menu (either by placing your cursor in a field and selecting Simple Search>> Current Field or by selecting a default Simple Search field from the administrator-defined list). A dialog box then appears where you can define the criteria you want to query. HEAT runs the query against the field, then displays the group meeting the criteria in the Call Logging main window.

Example: You can create a Customer Group for all customers living in Colorado Springs (your expression would be `City = Colorado Springs`). To Simple Search for this group, place your cursor in the City field, then select Simple Search>>Current Field from the Group menu. You would then complete the expression by searching for "`= Colorado Springs`".

Creating Customer Groups Using a Boolean Search

You can create a Customer Group using a Boolean Search. When you create a Customer Group using a Boolean Search, you manually define the criteria for the group using the Create Customer Group dialog box. After you create a Boolean-defined group, you can save the group to use at a later time, save and run the group immediately, or run the group without saving it. If you save the group, you can run, edit, and delete the Customer Group at a later time.

Example: You could create a Customer Group for all Gold-level customers living in Colorado Springs (your expressions would be `SLA = Gold AND City = Colorado Springs`).

InfoCenter Upgrades

The InfoCenter, made up of the Call Map and the HEATBoard, features several enhancements, expediting navigation to different parts of a Call Record. Enhancements include:

- Call Map sort orders
- New HEATBoard Refresh button
- Call Map shortcut menus

For more information on Call Map Shortcut menus, see "New Shortcut Menus and Shortcuts" on page 1-30.

Call Map Sort Orders

HEAT now applies Grid Sort Order Preferences (Call Logging User Preferences>>Grid Settings tab) to assignments and journals on the Call Map. As a result, you can sort these items in the Call Map in ascending or descending order (alphabetically or numerically). Previously, this functionality was only available on the Assignment and Journal tabs.

New HEATBoard Refresh Button

Previously, the refresh interval for the HEATBoard was established by the system administrator, and there was no override available. Now you have the ability to force the HEATBoard to refresh by clicking the new Refresh button located at the top of the HEATBoard.

Additional Enhancements

HEAT has added several additional enhancements to this release, including:

- New shortcut menus and shortcuts
- FLS attachment image (paperclip)
- New locked call functionality
- Attachments upgrades
- Improved assignment functionality
- New Date Selection tool
- Expiration of passwords

New Shortcut Menus and Shortcuts

Several shortcut menus and shortcuts were added to Call Logging to assist in navigation and command access. Shortcut menus and shortcuts were added to the following areas:

- Call Map
- Call Log tab
- Assignment tab
- Journal tab

New Call Map Shortcut Menus

Shortcut menus are now available in the Call Map. If you right-click the Call Map, a shortcut menu appears, allowing you to navigate to an open Call Group, open an existing Call Group, or create a new Call Group. You can also navigate to the HEATBoard using this shortcut menu.

The new Call Map Shortcut menu:

If you right-click on a Call Map category (either Call ID, Call Info, Customer, Assignments, or Journal), a shortcut menu specific to each category appears:

- **Call ID:** The shortcut menu for this category accesses the Profile, Configuration, or Call History forms for the selected Call Record's Customer record. Using the shortcut menu, you can also add or view Call Record attachments and global attachments, as well as create new assignments and journal entries.
- **Call Info:** The shortcut menu for this category accesses the Detail, Assignment, and Journal forms for the selected Call Record, as well as commands for saving, locking/unlocking, and reopening the Call Record. The Attachments command allows you to add an new attachment or to view, add, edit, or remove global attachments.
- **Customer:** The shortcut menu for this category accesses the Profile, Configuration, or Call History forms for the selected Customer Record.
- **Assignments:** The shortcut menu for this category accesses commands for viewing existing Call Records and creating new assignments for the active Call Record.

  Note: If you right-click an assignment, you can access commands for editing the active assignment or creating a new assignment.

- **Journals:** The shortcut menu for this category accesses commands for viewing existing Call Records and creating new journal entries for the active Call Record.

  Note: If you right-click a journal entry, you can access commands for editing the active journal entry or creating a new journal entry.

Note: Right-clicking any specific field under a category accesses an Edit command for that field. The cursor jumps to the field in question to expedite the editing process.

Additional Assignment Tab Shortcuts

Several new shortcuts were added to the shortcut menu on the Call Record Assignment tab. Additional shortcuts include:

- **New Assignment (New to Grid View):** Creates a new assignment for the active Call Record.
- **Edit (New to Grid View):** Opens the selected assignment for editing.
- **Reorder (New to Form and Grid Views):** Accesses the Re-order Assignments dialog box where you can define an order for assignments.

Additional Journal Tab Shortcuts

Several new shortcuts were added to the shortcut menu on the Call Record Journal tab (grid view). Additional shortcuts include:

- **New Journal Entry (Grid View):** Creates a new journal entry for the active Call Record.
- **Edit (Grid View):** Opens the selected journal entry for editing.

FLS Attachment Image (Paperclip)

In First Level Support (FLS), any nodes with attachments now display a paperclip image, allowing the user to instantly identify which nodes have attachments. The paperclip image appears on both approved and unapproved nodes with attachments that are added, edited, or deleted.

New Locked Call Functionality

With the release of HEAT 8.0, there is additional locked call functionality:

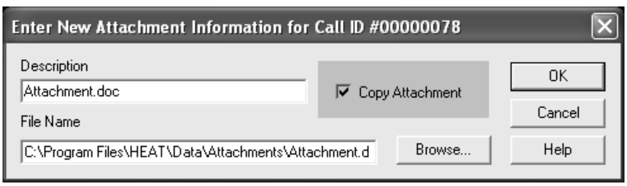
- Users can now view and navigate to locked calls using the Locked Calls dialog box in Call Logging. This dialog box is accessed from the Accessory menu in Call Logging. To navigate to a locked call, double-click the call in the list, or select the call and then click Go to Call.
- System administrators can now unlock locked calls simply by double-clicking the locked call in the Locked Calls dialog box in Administrator. This dialog box is accessed from the Security menu in the Administrator module. To unlock a locked call, double-click the call in the list.

Attachments Upgrades

HEAT now allows you to automatically copy an attachment (either Call, Profile, Global, or FLS) to a central location. The central location (usually a shared location) is specified by your system administrator in the Administrator module (Defaults>>System).

HEAT then points to the copy in the shared location rather than the original file.

You copy an attachment by selecting the new Copy Attachment check box on the Attachment dialog box:



Improved Assignment Functionality

This release of HEAT provides new and improved Assignment functionality. You can now:

- Enforce acknowledge-required and resolve-required fields be filled before being acknowledged or resolved.
- Require assignments to be acknowledged before resolved.
- Reorder assignments.
- Force assignments to be resolved in sequential order.

Enforcing Acknowledge- and Resolve-Required Fields to be Filled

HEAT can now enforce that users fill all acknowledge-required and resolve-required fields before acknowledging and resolving assignments.

Note: If you try to acknowledge or resolve an assignment before filling all required fields, a message appears informing you that the action failed. If you use BPAM to acknowledge or resolve an assignment, the error appears in the Log files.

Your system administrator determines which fields are acknowledge-required and resolve-required when he or she creates the fields. He or she enforces that they be filled before being acknowledged or resolved using the new Enforce Acknowledge Required and Enforce Resolution Required check boxes on the Assignment Options dialog box (accessed by selecting System>>Assignment Defaults from the Defaults menu in the Administrator module).

New Security Right to Require Acknowledgement Before Resolution

HEAT has added a new security right, "Enforce Acknowledge Before Resolve," that requires users to acknowledge assignments prior to resolving them. Resolution-required fields become read-only until the acknowledgement is made.

Your system administrator sets the security right using the Roles dialog box, Rights tab.

Note: If you try to resolve an assignment before acknowledging it, a message appears informing you that the action failed. If you use BPAM to acknowledge an assignment, the error appears in the Log files.

Reordering Assignments

With proper security rights ("Allow Assignment Reordering"), you can now reorder a Call Record's assignments.

This is especially useful when used in conjunction with the new feature that forces assignments to be resolved in order.

For more information, see "Forcing Assignment Resolution in Order" on page 1-36.

Reorder assignments for an active Call Record by selecting Assignment/Journal>>Reorder Assignments from the File menu in Call Logging.

Note: With security rights, you can reorder assignments even if the Call Record's Call Type is designated as one that must have its Assignments resolved in sequential order.

For more information, see "Forcing Assignment Resolution in Order" on page 1-36.

Tip:
When reordering assignments and forcing resolution in order, we recommend sorting assignments based on the Resolve Order field. Set this on the Call Logging User Preferences dialog box, Grid Settings tab.

Forcing Assignment Resolution in Order

In many businesses, it is essential to follow an established order of operations. With this release of HEAT, your system administrator can enforce the order in which assignments are completed to resolve an issue.

When enforced, any Call Record of a designated Call Type is required to resolve assignments in chronological order. Call Records with assignments that must be resolved in order are identified by the Resolve in Order icon  in the status bar.

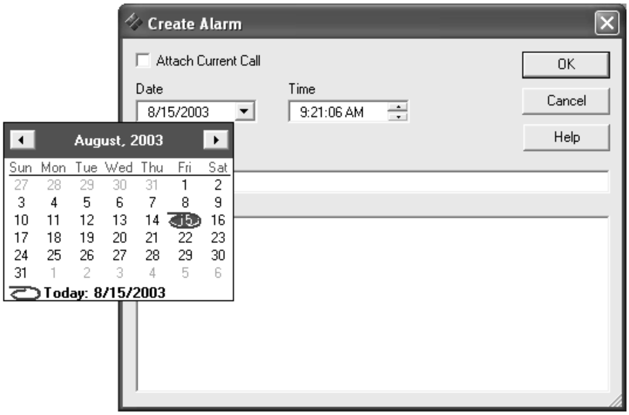
Your system administrator enforces the order using the Require resolution of ordered assignments by Call Type area on the Assignment options dialog box (accessed by selecting System>>Assignment Defaults from the Defaults menu in the Administrator module).

Notes:

- System administrators have the right to resolve any assignment.
- New assignments are placed in chronological order at the end of all other assignments.

New Date Selection Tool

The Create Alarm and Edit Alarm dialog boxes now have a date selection tool to assist you when inputting a date. Previously, there was only an input tool with up and down arrows for selecting a date.



Access the date selection tool by clicking the arrow next to the Date drop-down list on the dialog boxes.

To select a date, double-click a date on the calendar. Use the left and right arrows at the top of the dialog box to flip forward or backward by month.

Note: Today's date remains circled in red and remains written at the bottom of the dialog box regardless of the month you select.

Expiration of Passwords

System administrators now have the ability to set expiration dates on HEAT passwords. If implemented, users are prompted to type a new password at logon. HEAT also contains an option to notify users beforehand that passwords will expire.

System administrators set the expiration date using the new Password dialog box (accessed by selecting HEAT Password from the Security menu in the Administrator module).

Note: You can force users to reset their passwords at any time by checking the User must change password at next login check box on the User dialog box (Admin>>Security>>Users>>General tab).

Database-Related Changes

With the release of HEAT 8.0, several database-related changes require explanation:

- Primary key tag changes
- Increased field sizes
- System field format changes allowed

Primary Key Changes

Previously, the Call Type field was tagged as a primary key field. With the release of HEAT 8.0, this primary key designation is removed from the Call Type table's Call Type field.

The removal of the primary key designation provides greater flexibility; you can now have more than one instance of a Call Type in the Call Type table. For example, if your organization divides its employees into Internal and External Customer Types, previously you may have used a Validation Constraint so that Internal employees only saw Call Types relating to internal issues, and External employees only saw Call Types relating to external issues. Because of the primary key designation, however, there could be no overlap in Call Types between External and Internal. If both Customer Types had a need for a Call Type of Employee Setup, for example, they could not both use it. With the primary key designation removed from Call Type, this is no longer an issue; Call Types can be shared.

System Field Length Increases

For HEAT 8.0, some system field lengths were increased to accommodate larger values. When this change was made to a field, all system fields dependent upon the altered field were also expanded.

Note: As a result, you may notice in a grid view that it is now necessary to scroll right to bring certain fields into view, and that sometimes it might not be possible to see the entire field.

Changing System Field Format

Through an Edit Set, you can now change a system field's format. However, if a system field's format is altered, any dependent fields (that is, fields that call on the system field being altered for validation purposes) must also be of adequate length and compatible format.

CAUTION: Be aware of field dependencies before changing a system field's format. Should you affect a dependent field's ability to acquire information, truncation or loss of data may occur.

BPAM Improvements

The enhancements to HEAT's Business Process Automation Module (BPAM) increase BPAM's flexibility and make business rule workflow smoother and more efficient. Management can take advantage of new Business Rule template categories and use actions with more flexibility.

Business Rule Enhancements

This release includes additional Business Rule template categories.

Additional Template Categories

Two new Business Rule template categories—Profile records and Configuration records—enable you to design actions for a number of preset rules. You can design actions for these templates using Business Rule Editor in the same way you design actions for Call Records, Assignments, and Journals.

The Profile record template category allows you to define actions for the following rules:

- When a Profile record is created
- When a Profile record is modified

- When a Profile record date/time field passes
- When a call approaches a date and time in a date/time field on the Profile record

Like the Profile record category, the Configuration record template category allows you to define actions for the same rules with respect to Configuration records.

BPAM Administrative Enhancements

HEAT 8.0 BPAM enhancements include definition exportation and table size increases. Each of these enhancements is described below:

- **Definition exportation:** BPAM administrators can now share BPAM Business Rule definitions by using new import/export functionality. When exported, BPAM definitions save with a .hef (HEAT Export File) file extension (a printable format that can be opened in a text editor). The definitions can then be imported into another BPAM system. Note that items associated with Business Rules (such as AutoTasks, Call Groups, Customer Groups) are not automatically included during exportation; a **Process Linked Items** check box is selected by default to include those actions. E-mail actions are, however, automatically included during exportation.
- **Increased table sizes:** Previously, BPAM supported only tables that contained 255 or fewer fields, a limitation of Microsoft Access database tables. Now tables in BPAM can exceed 255 fields per table to accommodate other database platforms.

Note: The default data source for BPAM will remain an Access database. However, you can specify an alternative local data source in the Business Rule Monitor Configuration Tool under the Local Database heading.

Answer Wizard Improvements

HEAT now stores Report Categories as independent data files (.dat files), allowing you to add only those HEAT reports (often called "canned" reports) you use. For example, configure Answer Wizard to use HEAT Customer Information reports and HEAT Current Status reports only, or configure Answer Wizard to use all the Report Categories HEAT provides. The choice is yours.

This new feature allows you to simplify your Report Tree, customizing it for your environment.

Note: HEAT allows you to add up to 20 .dat files to the Report Tree.

Auto Ticket Generator Enhancements

Auto Ticket Generator (ATG) now logs e-mail errors.

HEAT Link to LDAP Improvements

HEAT Link to LDAP expanded the number of LDAP platforms it supports. Platforms now supported include:

- Open LDAP, Version 2.1.21 on the following platforms:
  - BSD Unix
  - Red HatLinux Version 9.0
- Lotus Domino Support 5.X and 6.01
- Active Directory 2003

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