DITO Technical Note

How to Install the HEAT® 9.5 Client

About This Document

This document provides instructions for installing the HEAT 9.5 Client software. It is intended for use by IHS Help Desk personnel who use HEAT to record and track Help Desk calls.

Revision History

VERSION	DATE	DESCRIPTION
1.0	3/2/2012	First published version.

Acknowledgements

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Related Documents

- *HEAT Service and Support Installation Guide* – Provides full instructions on all aspects of installation, both server and workstation, for HEAT 9.5.

Contact Information

If you have any questions or comments regarding this document, please contact the OIT Help Desk at IHS:

Phone: 505.248.4371 or 888.830.7280

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Contents

1. Preparing to Install

The process for installing the HEAT 9.5 Client includes the following main steps:

- Uninstalling any previous version of HEAT (e.g., 8.4).

  If you try to install HEAT 9.5 over an earlier version, the installation will fail.

- Obtaining the HEAT 9.5 Client Installation file

- Installing the HEAT 9.5 Client.

- Configuring the Data Source (ODBC) for the HEAT database

1.1. Client System Requirements for HEAT 9.5

Before starting the install, make sure that your workstation meets the following system requirements.

- Hardware:

  - 2 GHz (minimum 1.2 GHz)

  - 2 GB (minimum 1 GB)

- Operating Systems – One of the following:

  - Windows XP Pro, SP 3 or later (32 bit only)

  - Windows Vista, Ultimate Edition, SP2 (32-bit only)

  - Windows 7.0 (32- and 64-bit when running HEAT in 32-bit mode)

  - Windows Server 2003, Standard Edition, SP2 (32-bit only)

  - Windows Server 2008, Enterprise Edition, SP2 (32- and 64-bit)

- Other software -.NET 3.5 Framework

1.2. Uninstall an Older Version of HEAT

Use these steps to uninstall a previous version of HEAT before installing HEAT 9.5.

> NOTE: If you do not have administrative rights for your workstation and are unable to run the uninstall, contact your **local** IT staff for assistance.

1. Open the Windows Control Panel.

2. Start the uninstallation process:

   - On a Windows XP workstation, select **Add/Remove Programs**.

   - On a Windows 7 workstation, select **Programs and Features**.

3. On the list of programs, locate the HEAT application.

4. Right-click the HEAT application, and select **Uninstall**.

5. Follow the system prompts to complete the uninstallation.

1.3. Obtain the HEAT 9.5 Installation File

1. Browse to the following site: \\npaheat04\Heat Client Install

2. Open the **HEAT 9.5.2** folder.

3. Copy the file, **Setup.MSI**, to your workstation.

2. Installing the HEAT 9.5 Client

Use the steps below to install the HEAT 9.5 Client on your workstation.

NOTE: Be sure you have uninstalled any earlier versions of HEAT
before you proceed.

1. Browse to the location where you copied the **Setup.MSI** installation file. (See above.)

2. Double-click the file to start the installation and display the Welcome screen.

Figure 1: Welcome window for the HEAT InstallShield Wizard

3. Click **Next** to display the License Agreement window.
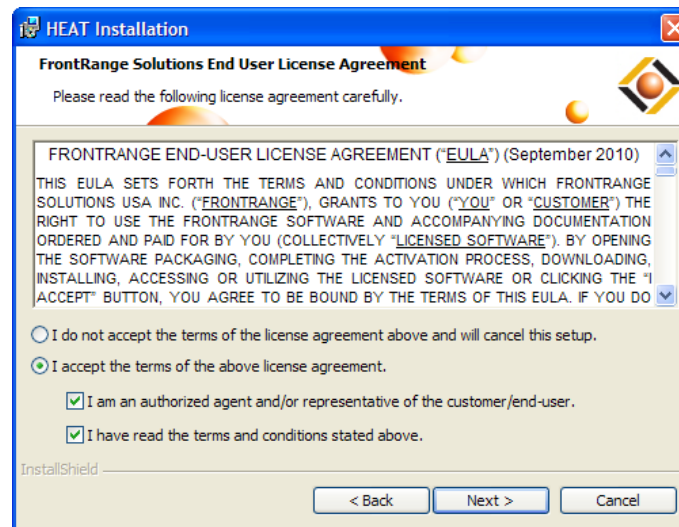
Figure 2: End User License Agreement window

4. Click the **I accept** option, and then click **Next** to display the Setup Type window.

5. As the Setup Type, select **Typical** and click **Next**.

   The **Typical** option installs Call Logging, Alert Monitor, and First Level Support.

6. On the Ready to Install the Program window, click **Install** to start the installation.

7. When the installation is complete, click **Finish** on the InstallShield Wizard Completed window.

3. Setting Up the ODBC Data Source

When you first log in to HEAT Call Logging after the installation, the system will automatically prompt you to set up an ODBC data source for the HEAT database.

Use these steps to configure the ODBC Data Source for the HEAT 9.5 Client.

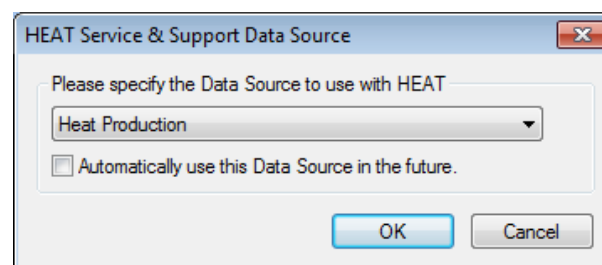1. Launch Call Logging to display the HEAT Service & Support Data Source window.

Figure 3: HEAT Service & Support Data Source window

If you had an earlier version of HEAT on the workstation, it will display **Heat Production** as the Data Source. However, this has not yet been configured for HEAT 9.5.

2. Click the down arrow to open the Data Source list, and select the option for **More ODBC data sources….**
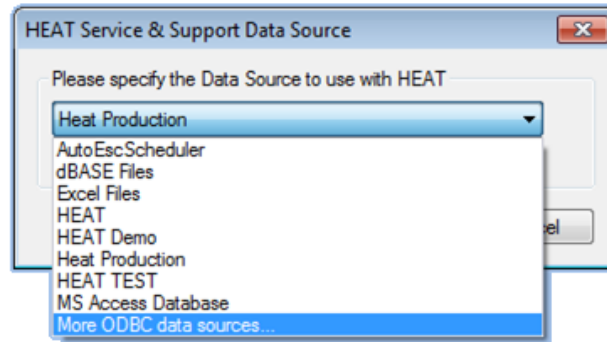
Figure 4: Data source selection menu

3. On the Select Data Source window, switch to the **Machine Data Source** tab, and click the **New** button.
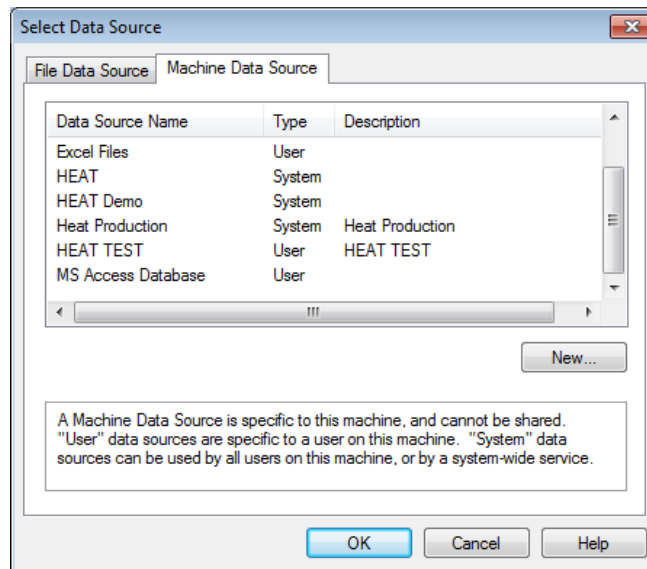
Figure 5: Select Data Source window

The system starts the initial Create New Data Source wizard, which you use to define the type of data source and the driver to use.

4. Complete the wizard, as follows:

a. On the first Create New Data Source window, make sure that **System Data Source** is selected as the type, and then click **Next**.
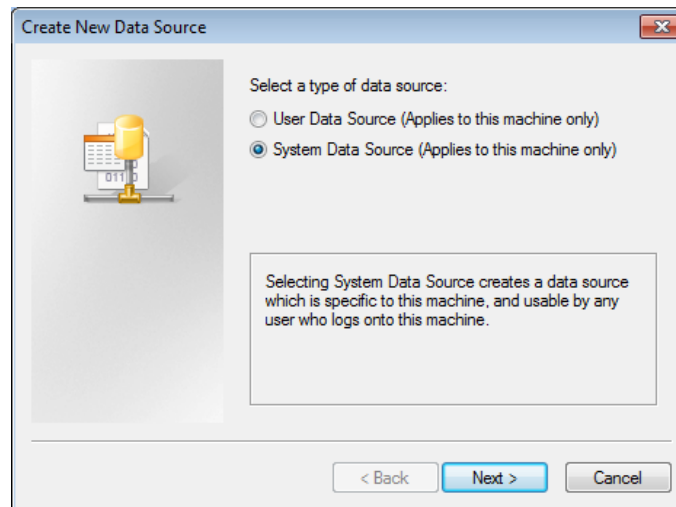
Figure 6: Create New Data Source (Type) window

b. As the driver for the Data Source, select **SQL Native Client**, and click **Next**.

The **SQL Native Client** is used for purposes of illustration. However, **SQL Server** will also work. If you use the latter, the windows will look a little different than those shown below, but the information will be the same.
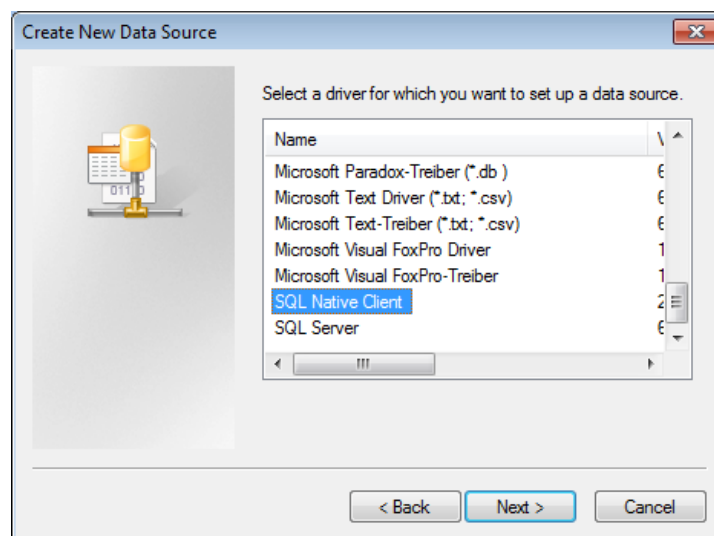

Figure 7: Create New Data Source (Driver) window

c. On the final window, click **Finish** to create the data source and start the wizard for creating the data source for SQL Server.
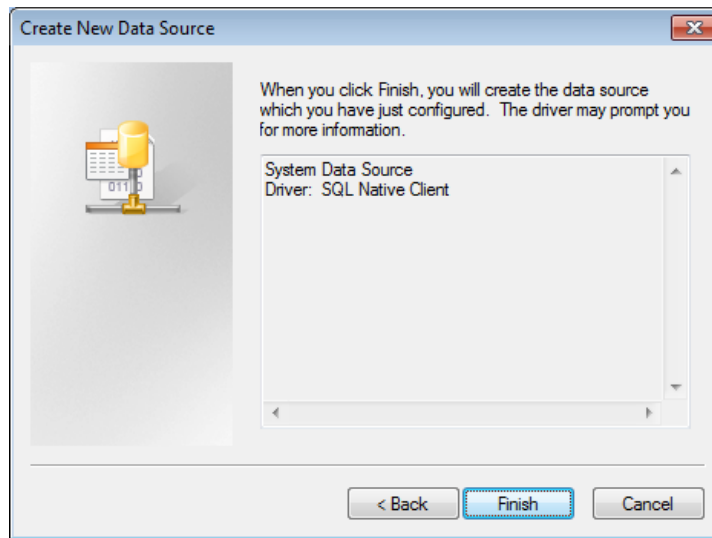
Figure 8: Create New Data Source (Finish) window

5. Complete the SQL Server wizard as follows:

a. On the window, Create a New Data Source to SQL Server, enter the following information:

- **Name** = **HEAT**

- **Description** = **HEAT**
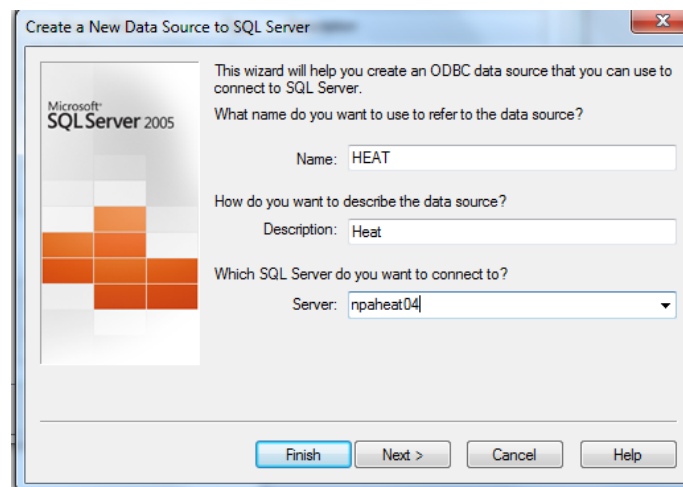
- **Server** = **npaheat04**

Figure 9: Create a New Data Source to SQL Server window (#1)

b. Click **Next**.

If the system warns you that the data source (i.e., **HEAT**) already exists, click **Yes** to overwrite the older version.

c. On the authentication methods window, fill in the fields as follows:

- Select/enable the following options:

  - **With SQL Server Authentication using a login ID and Password entered by the user**.

  - **Connect to SQL Server to obtain default settings for the additional configuration options**.

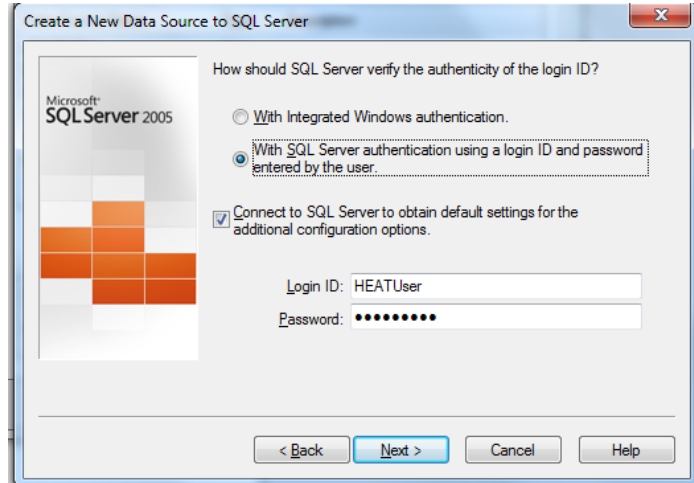- **Login** = HEATUser

- **Password** = cowboy23!

Figure 10: SQL Server authentication method window

d. Click **Next** to display the database selection window.

e. Select/enable the option, **Change the default database to**, and select **HEAT** from the drop-down list.

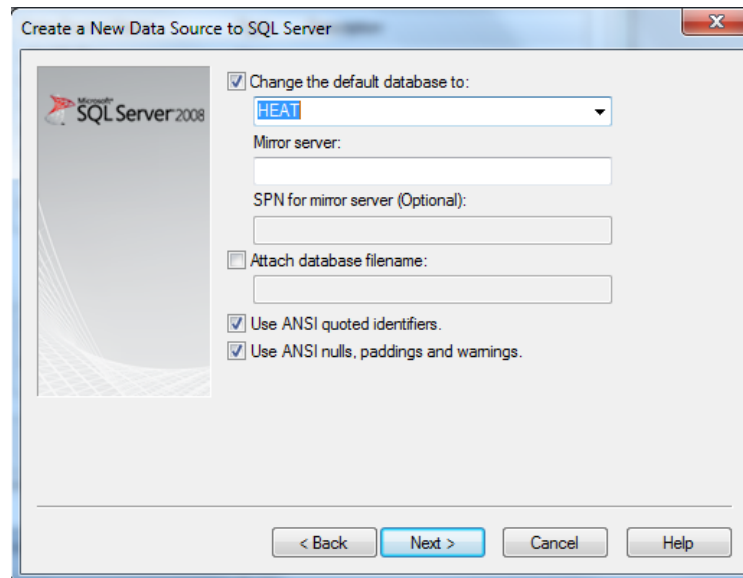You can accept the default values for the other fields.

Figure 11: SQL Server default database specification window

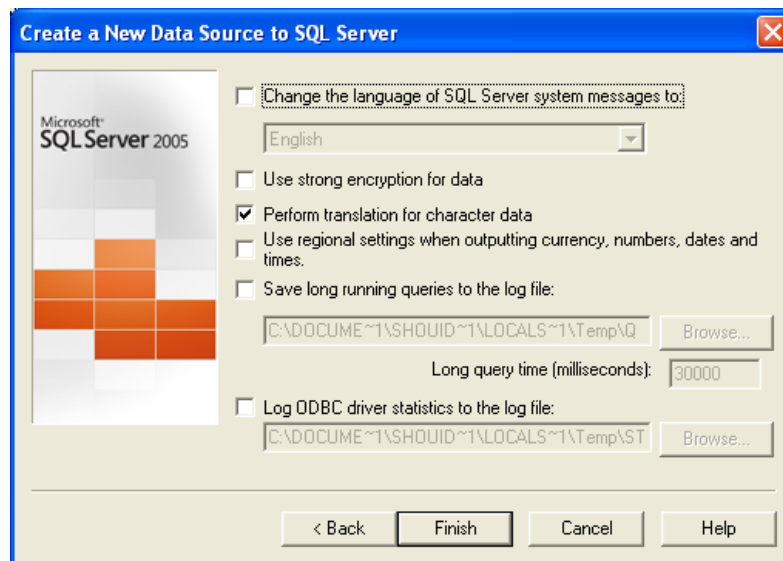**f.** Click **Next** to display the final window for this wizard.

Figure 12: Final SQL Server Data Source window

g. Click **Finish** to complete the wizard.

At this point, the system displays a summary of the ODBC data source configuration.

6. Test the connection, as follows:

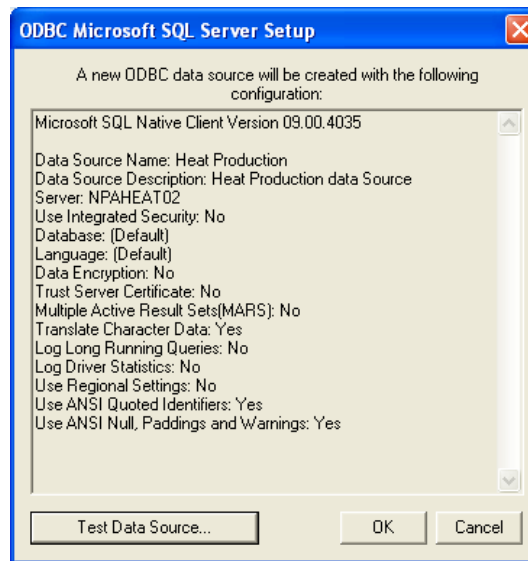**a.** On the summary window, click **Test Data Source**.

Figure 13: New ODBC Data Source summary window

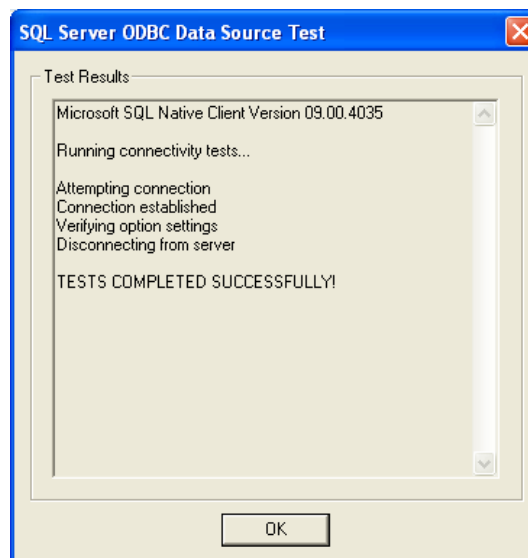**For a successful connection, the system displays a results window like the following:**

Figure 14: Data Source Test Results window

b. Click **OK** on the test results window, to return to the summary window.

c. Click **OK** again to complete the data source setup.

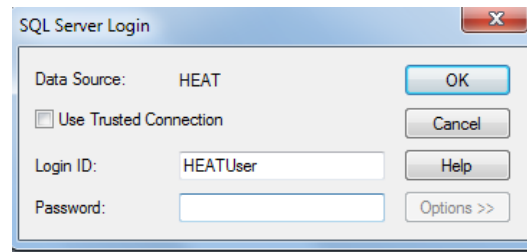At this point, the system prompts you to log in to the SQL Server.

Figure 15: SQL Server Login window

7. To log in, enter the password you used previously (i.e., **cowboy23!**), and click **OK**.

8. When prompted to use the same database User ID and Password in the future, click **Yes**.

At this point, the system displays the main Call Logging window, and HEAT 9.5. Client installation and configuration are complete.