# 2016.2_ITFMForPOSTMCT2013.1_2013.2.MetadataPackage

Developed by HEAT Software, Inc.

For use with baseline HEAT versions 2013.1 and 2013.2

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## Purpose

This package allows customers using baseline versions of HEAT 2013.1 or 2013.2 to install and use the ITFM module. The ITFM package *must* be deployed and configured prior to importing and deploying the Portfolio and Project Management package.

**Caution:** The HEAT System on which you activate this package must be version 2016.2 or later.

## Interoperability and Compatibility

The **2016.2_ITFMForPOSTMCT2013.1_2013.2.MetadataPackage** can be applied to the following HEAT Software products:

### Baseline HEAT Software Product: 2013.1, 2013.2

Other required installed HEAT Software modules or add-ons: **None**

## Installing the Package

### Before You Begin the Installation

Before you begin, back up your HEAT Software database.

- For on-premise implementations, you can do this manually.
- For Cloud implementations, request that the HEAT Software Operations team back up your database.

### Installation Instructions

Import the package by doing the following:

1. Log into HEAT Service Management as an administrator.
2. From the top right, click **Configure Application** to go to the Configuration Console.
3. On the **Settings** pane, click **Build > HEAT Development Package**.
4. Click **Import Package** on the top right.
5. At the Import Package dialog click **Browse…** to find and select the **2016.2_ITFMForPOSTMCT2013.1_2013.2.MetadataPackage** package for import.
6. Select **Validate and apply if no errors**.
7. The package will be imported without errors.
   **NOTE:** The import may display Warnings. These are expected and are due to metadata differences between your HEAT baseline version and the latest version of HEAT.

## Configuration Instructions

After successfully importing the package you will need to make the following manual configurations in order for ITFM to work with your version of HEAT.

### Update Service Request layout for HEAT 2013.1 or HEAT 2013.2 baseline

1. Log in to HEAT using the Administrator role and select **Configure Application** to open the Configuration Console.
2. From **Settings** select **Build > Business Objects** and select (or search for) the **Service Request** business object.
3. On the Layouts link, select **ServiceReqLayout.New** to open the **Edit Layout: ServiceReqLayout.New** page.
4. Under **Views in this layout:** click on **formView** in the View Name column.
5. Under **Child Panels**, click **Add Child Panel** to add the **Cost Item tab** and set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Cost Item |
| **Object** | Check: **Use both direct and rollup relationships**<br>Direct Relationship: **Frs_ITFM_Transaction (via ServiceReqAssocFrs_ITFM_Transaction)**<br>Click **Add New Rollup Sequence**<br>For each Rollup shown below, at the **Rollup Chain Editor** check the **Show rollup records by default** option.<br>Click the plus **+** sign and set the following:<br>**1.** Display Name: **Task Cost Item**<br>**Roll up chain: ServiceReq** select **Task(via ServiceReqAssociatedTask)**,<br>click **+** and select **Frs_ITFM_Transaction (via TaskAssocFrs_ITFM_transaction)**<br>**2.** Display Name: **Parameter Cost Item**<br>**Roll up chain: ServiceReq** select **ServiceReqParam (via ServiceReqContainsServiceReqParam)**,<br>click **+** and select **Frs_ITFM_Transaction (via ServiceReqParamAssocFrs_ITFM_Transaction)**. |

| Column | Parameter |
|---|---|
| | **3.** Display Name: **Parameter Link Cost Item**<br>**Roll up chain: ServiceReq** select **ServiceReqParam (via ServiceReqContainsServiceReqParam),**<br>click **+** and select **ServiceReqParamLink (via ServiceReqParamContainsServiceReqParamLink)**,<br>click **+** and select **Frs_ITFM_Transaction (via ServiceReqParamLinkAssocFrs_ITFM_Transaction)**. |
| **Toolbar** | Remove **Link**, **Unlink**, and **Go to** by dragging the icons to Trash. |
| **List** | Frs_ITFM_Transaction.DefaultGrid |
| **Form(s)** | Frs_ITFM_Transaction.ManualEntryForm |
| **List Filter** | $(nvl(IsCancelled,  false) == false && nvl(Cost,  0) != 0) |
| **Show Count in Title** | Yes |

After the **Cost Item tab** is added to Child Panels, check the option: **Show Summary screen for transactions** and select **Edit Summary Settings** to open the **Edit Transaction Summary Settings** window. Update the following parameters:

- Filter field: CreatedDateTime
- Aggregate On: Cost

### Update Incident layout for HEAT 2013.1 and HEAT 2013.2 baseline

1. Log in to HEAT using the Administrator role and select **Configure Application** to open the **Configuration Console**.
2. From **Settings** select **Build > Business Objects** and select (or search for) the **Incident** business object.
3. On the Layouts link, select **IncidentLayout.ServiceDesk** to open **Edit Layout: IncidentLayout.ServiceDesk**.
4. Under **Views in this layout:**, click on the **formView** link in the **View Name** column.
5. Under **Child Panels**, click **Add Child Panel** to add the **Cost Item tab** and set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Cost Item |

| Column | Parameter |
|---|---|
| **Object** | Check the **Use both direct and rollup relationships** option.<br>Direct Relationship: **Frs_ITFM_Transaction (via IncidentAssociation Frs_ITFM_Transaction)**<br>Click **Add New Rollup Sequence**<br>At the Rollup Chain Editor check the **Show rollup records by default** option.<br>Click the plus **+** sign and set the following:<br>Display Name: **Cost Item for Incident and its Task**<br>**Rollup Chain: Incident** select **Task(via IncidentContainsTask)**<br>click **+** and select **Frs ITFM_Transaction (viaTaskAssocFrs ITFM_Transaction)** |
| **Toolbar** | Remove **Link**, **Unlink**, and **Go to** by dragging the icons to Trash. |
| **List** | Frs_ITFM_Transaction.DefaultGrid |
| **Form(s)** | Frs_ITFM_Transaction.ManualEntryForm |
| **Show Count in Title** | Yes |

After the **Cost Item tab** is added to Child Panels, check the option: **Show Summary screen for transactions** and select **Edit Summary Settings** to open the **Edit Transaction Summary Settings** window. Update the following parameters:

- Filter field: **CreatedDateTime**
- Aggregate On: **Cost**

Repeat the same steps for **IncidentLayout.HelpDesk** if you are using that layout.

### Update CI.Service layout for HEAT 2013.1 and HEAT 2013.2 baseline

1. Log in to **HEAT** with Administrators role and select **Configure Application.**
2. From **Settings** select **Build > Business Objects** and search for **CI.Service** business object.
3. Click **Layouts**, and select **CI.Service** to open the **Edit Layout: CI.Service** page.
4. Under **Views in this layout:**, click on the **formView** link in the **View Name** column.
5. Under **Child Panels** section, locate **Cost Items** and **Cost History** (both are shown as Plugin objects).
6. Scroll to the right to reveal the delete (X) icon and delete both **Cost Items** and **Cost History**.
7. Click **Add Child Panel** to add the **Cost Item** tab, set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Cost Item |
| **Object** | (Direct Relationship) Frs_ITFM_TransactionAssocCIService |
| **Toolbar** | Remove **Link**, **Unlink**, and **Go to** by dragging the icons to Trash. |
| **List** | Frs_ITFM_Transaction.DefaultGrid |

| Column | Parameter |
|---|---|
| **Form(s)** | Frs_ITFM_Transaction.ManualEntryForm |
| **List Filter** | $(nvl(IsCancelled, false) == false && nvl(Cost, 0) != 0) |
| **Show Count in Title** | Yes |

After the **Cost Item tab** is added to Child Panels, check the option: **Show Summary screen for transactions** and select **Edit Summary Settings** to open the **Edit Transaction Summary Settings** window. Update the following parameters:

- Filter field: CreatedDateTime
- Aggregate On: Cost

**8.** Click **Add Child Panel** to add the **Cost Driver** tab, set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Cost Driver |
| **Object** | (Direct Relationship) Frs_ITFM_Cost_DriverAssocCIService |
| **Toolbar** | Remove **New Record Menu** and **Delete** by dragging the icons to Trash. |
| **List** | Frs_ITFM_Cost_Driver.DefaultGrid |
| **Form(s)** | Frs_ITFM_Cost_Driver.DefaultForm |
| **List Filter** | $(Status == "Active") |
| **Show Count in Title** | Yes |

**9.** Click **Add Child Panel** to add **Distribution** tab, set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Distribution |
| **Object** | (Direct Relationship) Frs_ITFM_Recurring_Service_SubscriptionAssocCIService |
| **Toolbar** | Remove all toolbar items |
| **List** | Frs_ITFM_Recurring_Service_Subscription.ServiceDistributionGrid |
| **Form(s)** | Frs_ITFM_Recurring_Service_Subscription. ServiceDistributionForm |
| **Show Count in Title** | Yes |

**10.** Click Add Child Panel to add Allocation tab, set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Allocation |
| **Object** | (Direct Relationship) Frs_ITFM_Recurring_Service_SubscriptionAssocCIService2 |

| Column | Parameter |
|---|---|
| **Toolbar** | Remove **Link**, **Unlink**, and **Go to** by dragging the icons to Trash.<br>Click the **New Record Menu** icon and select **Edit** (Pencil icon), in the **Toolbar Editor dialog >Text:** select the **Custom** radio button and enter<br>**New Cost Allocation** in the field.<br>Click **Save** to exit the dialog, then **Save** to exit the **Toolbar Editor** |
| **List** | Frs_ITFM_Recurring_Service_Subscription.ServiceAllocationGrid |
| **Form(s)** | Frs_ITFM_Recurring_Service_Subscription.ServiceAllocationForm |
| **Show Count in Title** | Yes |

### Update CI layout for HEAT 2013.1 and HEAT 2013.2 baseline Versions

1. Log in to HEAT with Administrators role and select **Configure Application**.
2. Select **Build > Business Object** and search for the **CI** business object.
3. On the **Layouts** link, select **CI** to open **Edit Layout: CI** page.
4. Under **Views in this layout**, select **Server** in the **View Name** column.
5. Under **Child Panels** section, locate **Cost Items** and **Cost History** (both are represented as **Plugin** objects).
6. Scroll to the right to reveal the delete (X) icon and delete both **Cost Items** and **Cost History.**
7. Click **Add Child Panel** to add **Cost Item** tab, set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Cost Item |
| **Object** | (Direct Relationship) Frs_ITFM_Transaction (via CIAssocFrs_ITFM_Transaction) |
| **Toolbar** | Remove **Link** and **Unlink** by dragging the icons to Trash. |
| **List** | Frs_ITFM_Transaction.DefaultGrid |
| **Form(s)** | Frs_ITFM_Transaction.ManualEntryForm |
| **Show Count in Title** | Yes |

After the **Cost Item tab** is added to Child Panels, check the option: **Show Summary screen for transactions** and select **Edit Summary Settings** to open the **Edit Transaction Summary Settings** window. Update the following parameters:

- Filter field: **CreatedDateTime**
- Aggregate On: **Cost**

8. Click **Add Child Panel** to add **Cost Allocation** tab, set the following parameters:

| **Column** | **Parameter** |
|---|---|
| **Display Name** | Cost Allocation |
| **Object** | (Direct Relationship) Frs_ITFM_Recurring_Service_SubscriptionAssocCI |
| **Toolbar** | Remove **Link**, **Unlink**, and **Go to** by dragging the icons to Trash.<br>Click the **New Record Menu** icon and select **Edit** (Pencil icon), in the **Toolbar Editor dialog >Text:** select the **Custom** radio button and enter **New Cost Allocation** in the field.<br>Click **Save** to exit the dialog, then **Save** to exit the **Toolbar Editor**. |
| **List** | Frs_ITFM_Recurring_Service_Subscription.ServiceAllocationGrid |
| **Form(s)** | Frs_ITFM_Recurring_Service_Subscription.CIAllocationForm |
| **Show Count in Title** | Yes |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Cost Item | Frs_ITFM_Transaction | CIAssocFrs_ITFM_Transaction | Edit | List | Frs_ITFM_Tranaction.DefaultGrid | Frs_ITFM_Transaction.ManualEntryForm | Tab | <Not Set> |
| Cost Allocation | Frs_ITFM_Recurring_Service_Subscription | Frs_ITFM_Recurring_Service_SubscriptionAssocCI | Edit | List | Frs_ITFM_Recurring_Service_Subscription.ServiceAllocationGrid | Frs_ITFM_Recurring_Service_Subscription.CI... | Tab | <Not Set> |

Repeat the same steps for:

- Workstation, Computer, Scanner, Access Point, Enterprise Application, Firewall, Middleware, MobileDevice, Printer, Rack, Router, SAN, UPS, VideoConference, VOIP.

Remove **Cost Items** and **Cost History** tabs for the following:

- VirtualServer,VirtualWorkstation, CI.Service, Batch Job, Cluster, Contract, Database, Document, Fax, Generator, Monitor, Switch, System, Peripheral Device, and Phone,

For ProductivityApp:

- *Remove* both **Cost Items** and **Cost History** tabs and *add back only* **Cost Item** *but not* Cost Allocation.

### Update Employee layout for HEAT 2013.2 baseline Version

1. Log in to HEAT with Administrators role and select **Configure Application**.
2. Select **Build > Business Object** and search for the **Employee** business object.
3. On the Layouts link, select **Profile.Employee** to open **Edit Layout: Profile.Employee** page.
4. Under **Views in this layout**, select **formView** in the View Name column.

5. Under Child Panels section, click **Add Child Panel** to add Recurring Service Subscription tab, set the following parameters:

| Column | Parameter |
|---|---|
| **Display Name** | Recurring Service Subscription |
| **Object** | (Direct Relationship) Frs_ITFM_Recurring_Service_Subscription (via Frs_CompositeContract_ContactAssocFrs_ITFM_Recurring_Service_Subscription) |
| **Toolbar** | Remove **New Record Menu**, **Delete**, **Link**, **Unlink**, and **Go to** by dragging the icons to Trash. |
| **List** | Frs_ITFM_Recurring_Service_Subscription.DefaultGrid |
| **Form(s)** | Frs_ITFM_Recurring_Service_Subscription.DefaultForm |
| **Show Count in Title** | Yes |

- Repeat the same steps for **Profile.Employee.SDA** if you are using that layout.

## Testing the Implementation

Test that the package was imported successfully and that the configurations were correctly updated by doing the following:

- Create a Master Budget Plan from the Admin workspace.
- Create an ITFM Cost Item in the Service Request Layout.

See the Help topics for more information on how to create these items.