2016.2_ITFMForPOSTMCT2014.1_2014.2.MetadataPackage

Developed by HEAT Software, Inc.

For use with baseline HEAT versions 2014.1 and 2014.2

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Purpose

This package allows customers using baseline versions of HEAT 2014.1 or 2014.2 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_ITFMForPOSTMCT2014.1_2014.2.MetadataPackage** can be applied to the following HEAT Software products:

Baseline HEAT Software Product: 2014.1, 2014.2

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_ITFMForPOSTMCT2014.1_2014.2.MetadataPackage** package for import.
6. Select **Validate and apply if no errors**.
7. The package will be imported without errors.
   NOTE: There may be some Warnings that are displayed. This is normal, and is 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 2014.1 baseline

For HEAT 2014.2 baseline ensure that you verify the following steps. Update any items that may be missing.

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** Direct Relationship: **Frs_ITFM_Transaction (via ServiceReqAssocFrs_ITFM_Transaction)** Click **Add New Rollup Sequence** For each Rollup shown below, at the **Rollup Chain Editor** check the **Show rollup records by default** option. Click the plus **+** sign and set the following: **1.** Display Name: **Task Cost Item** **Roll up chain: ServiceReq** select **Task(via ServiceReqAssociatedTask)**, click **+** and select **Frs_ITFM_Transaction (via TaskAssocFrs_ITFM_transaction)** **2.** Display Name: **Parameter Cost Item** **Roll up chain: ServiceReq** select **ServiceReqParam (via ServiceReqContainsSerivceReqParam)**, click **+** and select **Frs_ITFM_Transaction (via ServiceReqParamAssocFrs_ITFM_Transaction)**.

Column	Parameter
	3. Display Name: **Parameter Link Cost Item** **Roll up chain: ServiceReq** select **ServiceReqParam (via ServiceReqContainsServiceReqParam),** click **+** and select **ServiceReqParamLink (via ServiceReqParamContainsServiceReqParamLink)**, click **+** and select **Frs_ITFM_Transaction (via ServiceReqParamLinkAssocFrs_ITFM_Transaction)**.
Toolbar	Remove **Link**, **Unlink**, and **Go to** by dragging to the trash icon.
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 2014.1 baseline

For HEAT 2014.2 baseline ensure that you verify the following steps. Update any items that may be missing.

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. Direct Relationship: **Frs_ITFM_Transaction (via IncidentAssociation Frs_ITFM_Transaction)** Click **Add New Rollup Sequence** At the Rollup Chain Editor check the **Show rollup records by default** option. Click the plus **+** sign and set the following: Display Name: **Cost Item for Incident and its Task** **Rollup Chain: Incident** select **Task(via IncidentContainsTask)** click **+** and select **Frs ITFM_Transaction (viaTaskAssocFrs ITFM_Transaction)**
Toolbar	Remove **Link**, **Unlink**, and **Go to** by dragging to the trash icon.
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 2014.1 baseline

For HEAT 2014.2 baseline ensure that you verify the following steps. Update any items that may be missing.

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

Column	Parameter
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

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
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
Toolbar	Remove **Link**, **Unlink**, and **Go to**. 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. 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 2014.1 and HEAT 2014.2 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 (vis CIAssocFrs_ITFM_Transaction)
Toolbar	Remove **Link** and **Unlink** by dragging 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. 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. 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.

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.