Changes and Enhancements in IT Charge Manager Software

Introduction

IT Charge Manager Software, Release 2.3 is an add-on product to IT Service Vision software from SAS. It has incorporated a number of changes and enhancements, as well as fixes for problems since the last release. This document summarizes the major changes and enhancements in IT Charge Manager Software, Release 2.3. It is intended for users who have previous experience with IT Charge Manager software. This document groups changes and enhancements by relevant functionality. You may find complete information on these topics in the *IT Charge Manager User's Guide*.

Maintenance

The maintenance application in IT Charge Manager Software, Release 2.3 refreshes site-level metadata and marks the status of all PDBs as needing administration automatically. Release 2.3 also provides automatic back-level protection. Therefore, you are not able to use previous releases of IT Charge Manager software to administer the site after IT Charge Manager Software, Release 2.3 updates it.

Multi-currency Support

IT Charge Manager Software, Release 2.3 has a new dialog that accepts currency exchange rates by invoice period, making the exchange rate history available for examination online and maintaining the ability to regenerate at any time.

IT Charge Manager Software, Release 2.3 displays currency numbers in either a generic format where applicable or in the format of the currency itself whenever possible.

The customer profile entry dialog and monthly data consolidation process in Release 2.3 produces a currency exchange table. You may use the newly implemented dialog to enter the exchange rates of currencies found that are anchored to the Euro and expressed in units of currency per Euro. Locked European currencies are initialized with the locked exchange rate.

Reporting

IT Charge Manager Software, Release 2.3 has added a new profile-driven invoicing functionality to print the full customer profile information atop a convenient invoice format whose source code is available for you to modify. You may also perform charge editing and data display on selected currencies.

IT Charge Manager Software, Release 2.3 provides a formatted dump of IT Charge Manager metadata and consolidation library contents via an on-demand configuration report. This report may be used to provide a history of system configuration changes and additionally to serve as a valuable tool for analyzing situations when submitting product support issues.

IT Charge Manager Software, Release 2.3 provides sample data and report templates to be used by Enterprise Reporter software. Full details on using IT Charge Manager data with Enterprise Reporter software are in the chapter on Data Exploration and Reporting in the *IT Charge Manager User's Guide*.

Support of Windows NT Server

IT Charge Manager Software, Release 2.3 is capable of accessing IT Service Vision PDBs residing on Windows NT servers via either TCP/IP or mapped drives.

Miscellany

Additional features in IT Charge Manager Software, Release 2.3 are listed below:

- An improved dialog may be used to conduct apportionment of charges by currency of charge within consolidated data.
- Charge item numbers may be re-assigned using any identifier with a length of one to six characters. The identifier may contain any combination of alphanumeric characters without embedded blanks.
- Invoice periods and currencies may be selected for data manipulation and examination by clicking items in a list.
- Options for manual code generation and submission are available for batch processes.
- Release 2.3 provides more error-checking and diagnostic messages when running the consolidation process.
- Release 2.3 has improved error-checking and diagnostic mechanisms for operational debugging.

Installing IT Charge Manager Software

This section includes requirements, preparation, and installation information. The "Requirements" section contains information on hardware and software needed for the installation. The "Preparation" section contains information on what you need to do to prepare for the IT Charge Manager installation. The "Installation" section contains the IT Charge Manager installation instructions.

Requirements

IT Charge Manager software requires the following minimum configuration for the installation and execution of IT Charge Manager software. It is possible to install and execute IT Charge Manager software on systems less powerful than those listed in this section; however, performance problems may result.

Client Requirements

Hardware

- A Pentium II or faster computer with 32 MB RAM and mouse
- VGA graphics with a minimum desktop area of 1024x768 pixels
- 35 MB disk space for the program and beginning files with expansion possible
- Connection to host system via coax, cable, or modem

Software

- Windows 9x, Windows Me, or Windows NT, Version 4.0 or later (IT Charge Manager software will not execute on a Windows 3.x system)
- The SAS System for Windows, Release 6.12 (TS055 or higher) or Release 8.1 or later
- IT Service Vision Client Software, Release 2.3 or later
- If you are using the SAS System, Release 6.12, the **SAS Euro Package** is required. You must apply the SAS Euro Package to the SAS System, Release 6.12, even if you do not require multi-currency features in IT Charge Manager software. The Standard Invoice and To-Date report may fail with the error `function eurocurr is unknown` if the SAS Euro Package has not been installed.

  The SAS Euro Package is included in zip file format on the IT Charge Manager installation CD, along with an HTML file - `europkg-install.htm` - that describes the package and how to install it.

- Access software (TCP/IP, APPC, Emulator that supports EHLLAPI); not required for use at sites with Windows NT only
- A frame-capable Web browser: Microsoft Internet Explorer, Version 4.0 or later or equivalent browser

The following software is required if you want to use the Enterprise Reporter interface to prepare reports on IT Charge Manager data:

- If you are running Release 6.12 of the SAS System, install Enterprise Reporter Software, Version 2.0 and the most current Service Pack for Version 2.0.
- If you are running Release 8.1 of the SAS System, install Enterprise Reporter Software, Release 2.5 and the most current Service Pack for Release 2.5.

Server Requirements

Hardware

- Storage for source and data files

Software for OS/390

- Base SAS Software, Release 6.09 Enhanced (TS475 or higher) or Release 8.1 or later
- IT Service Vision Server Software for OS/390, Release 2.3 or later
- SAS/CONNECT Software

Software for Open Systems

- Base SAS Software, Release 6.12 (TS055 or higher) or Release 8.1 or later
- IT Service Vision Server Software for Open Systems, Release 2.3 or later
- SAS/CONNECT Software

Software for Windows NT

- Base SAS Software, Release 6.12 (TS055 or higher) or Release 8.1 or later
- IT Service Vision Server Software for Windows NT, Release 2.3 or later

Preparation

The following checklist prepares you to install IT Charge Manager software at your location. By completing the checklist, you will be well prepared and will have reduced the chance of time-consuming problems during the installation and customization of IT Charge Manager software.

1. Install IT Service Vision software on the host as described in the IT Service Vision product documentation.
2. Activate each IT Service Vision PDB with userids for the people who will use IT Charge Manager software. This step populates an IT Service Vision internal table in each userid's SASUSER library with all PDBs. IT Charge Manager software uses this IT Service Vision internal table to display a customized PDB list for each user of IT Charge Manager software.
3. Run the IT Service Vision process step and reduce step once in each PDB from which you expect to charge. Observe a regular run of IT Service Vision software with data. Verify that there are no error messages. This step validates the IT Service Vision and PDB installation.
4. Install SAS/CONNECT software on the client and server hosts.
5. If you are using the SAS System, Release 6.12, you should install the SAS Euro Package. See the file - europkg-install.htm - on the IT Charge Manager installation CD for details.
6. Appendix C of the *IT Charge Manager User's Guide* contains notes for setting up EHLLAPI to run with a SAS/CONNECT session. Verify that SAS/CONNECT software works by itself (outside of IT Charge Manager software).

   Caution: Do not modify SAS/CONNECT default scripts that are named *xxxx.scr* because these scripts will be replaced when IT Charge Manager software is updated or re-installed. Instead, copy the script to a different name, make your changes to the copied version of the script, and point to it in the IT Charge Manager **Site Properties** window.

7. If the server is on OS/390, write down the high-level qualifiers of the IT Service Vision server libraries. If the server is on Open Systems, write down the path of `SASROOT`, the path of `CPEROOT`, and where you want to store non-PDB IT Charge Manager files.
8. You will be asked to provide several pieces of information that describe the environment in which IT Charge Manager software is to be installed. You can accept the default decisions and locations suggested by the installation script, modify a decision or storage location, or cancel the installation. The environmental descriptors include:

   ▪ the location of the SAS System for Windows on the client. The location is typically `c:\sas` for the SAS System, Release 6.12 (TS055 or higher) and `c:\Program Files\SAS Institute\SAS\V8` for the SAS System, Release 8.1 or later.
   ▪ the location of IT Service Vision software installed on the client (if it is installed) and the location of its main execution catalog `cpemain.sas7bcat`, typically `drive:\[SAS Install Path]\cpe`.
   ▪ the location where you want to store the IT Charge Manager Software, Release 2.3 directories on the client, typically `drive:\[SAS Install Path]\addon\cpe` for the SAS System, Release 6.12 (TS055 or higher) and `drive:\[SAS Install Path]\cpe` for the SAS System, Release 8.1 or later.

Installation

This section describes what the setup program does and how to run the setup program. The setup program loads IT Charge Manager software on your client and makes the IT Charge Manager client ready for customization. During the IT Charge Manager client customization, the files for the IT Charge Manager server are uploaded to the server.

Note: In Release 6.12 of the SAS System, the IT Charge Manager installation pathname was in the `addon` subdirectory; in Release 8.1 of the SAS System, the `addon` subdirectory has been removed. IT Charge Manager software for Release 8.1 of the SAS System is installed in the `drive:\[SAS Install Path]\cpe\chm` directory. The Release 8.1 default path is used in the installation examples. However, all examples may be executed in Release 6.12 by changing the installation path to `drive:\[SAS Install Path]\addon\cpe\chm`.

What the Setup Program Does

The installation program:

1. creates a directory on your hard disk. You can override the default directory name with a name of your choosing.
2. prompts you for the directory path for the SAS System configuration file (`config.sas`).
3. copies and decompresses the distribution files to the IT Charge Manager directory. Because the files are compressed, they cannot be copied directly from the distribution medium.
4. creates Microsoft Windows shortcuts to the start-up menu for IT Charge Manager software, IT Charge Manager AccountView, and IT Charge Manager documentation.

Running Setup for IT Charge Manager Software

1. Start Windows 9x, Windows Me, or Windows NT.
2. Insert the IT Charge Manager CD-ROM into the appropriate drive.
3. For Windows 9x and Windows NT, start the setup program on the IT Charge Manager CD-ROM by selecting:

   ➢ the Start menu,
   ➢ the Settings menu option,
   ➢ the Control Panel menu option,
   ➢ the Add/Remove Programs menu option, and then
   ➢ the Install menu option.
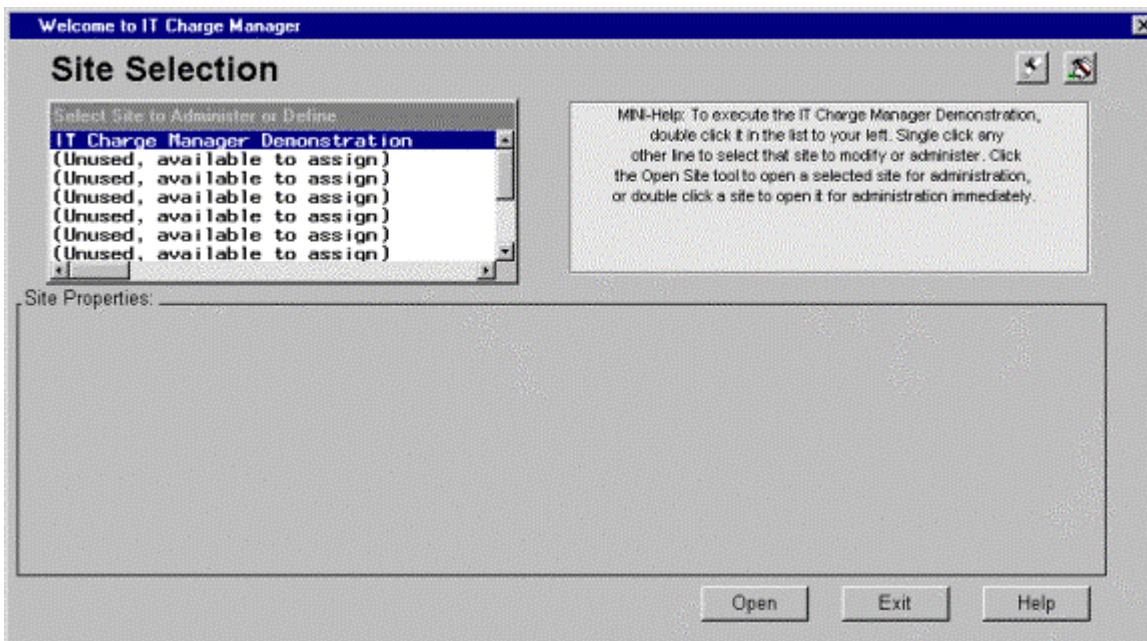
   4. Follow the prompts.

Starting IT Charge Manager Software

The following sections cover how to launch IT Charge Manager software, define a new site, change the properties for an existing site, and run the IT Charge Manager demonstration. Please refer to *IT Charge Manager User's Guide* for more details on customizing IT Charge Manager features.
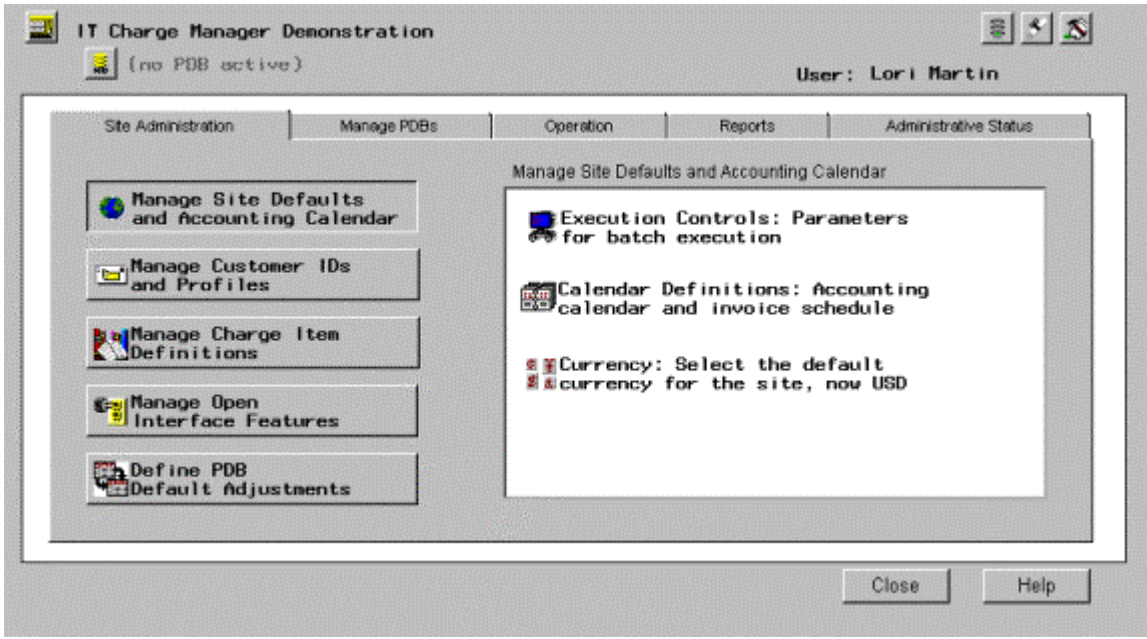
Launching the Software

Launching IT Charge Manager software involves connecting to the server host defined for the site you want to administer. You define the server location for IT Charge Manager software with the **Site Selection** window. After sites are defined, follow the steps below:

1. If the server is on OS/390, log off the server host to free any allocated data sets.
2. From the list in the **Site Selection** window as shown below, choose the site that you want to work with. Then, select **Open** to connect to that site. If you want to use a TCP/IP connection, connect to the server by using the same SAS/CONNECT script used in the "Preparation" section. If you want to set up a new site, see "Defining a New Site" in the *IT Charge Manager User's Guide*.
3. You will be prompted for a logon userid and password for the site you selected. For OS/390, the userid will be to your TSO application specified in the SAS/CONNECT script. For Open Systems, the userid will be to your UNIX machine as specified in the SAS/CONNECT script.

4. The first time an IT Service Vision server host is selected for use with IT Charge Manager software (by selecting **Site Selection**), a new set of libraries is created and populated on the server. These libraries contain the server-specific code and data for IT Charge Manager software. The libraries are created and loaded automatically. You will see boxes pop up on the client window showing file transfer messages between the server and the client.

5. After the logon is complete, the IT Charge Manager main menu is presented.

6. If the server is on OS/390, the TSO userid that you use to log on determines where your PDBs are stored. When an IT Service Vision administrator defines a PDB on OS/390, IT Service Vision software creates an entry identifying that PDB in an internal table. IT Service Vision software stores this table in the `SASUSER` library. There is a unique `SASUSER` library for each userid. Thus, if you use IT Charge Manager software with a userid that has never accessed certain PDBs, then those PDBs will not be listed in the **Manage PDBs** window in IT Charge Manager software.

Running the Demonstration

IT Charge Manager software includes a sample site. This site uses Windows as the server and has a PDB with data from Windows NT servers. First, launch IT Charge Manager software. In the **Site Selection** window, select the site called **IT Charge Manager Demonstration** and then select the **Open** button in the lower right corner of the window. This enables you to explore all of the features and functions of IT Charge Manager software without having to load your data first.

Upgrading to IT Charge Manager Software, Release 2.3

This section contains instructions for upgrading to IT Charge Manager Software, Release 2.3 from earlier releases. You may refer to the previous section "Changes and Enhancements in IT Charge Manager Software, Release 2.3" for more details. Should you have any questions or concerns, please contact SAS Technical Support before you execute the instructions below.

Caution: Do not use this section if you are installing IT Charge Manager software for the first time.

Please complete the following steps between operational runs of the IT Service Vision process step and reduce step.

1. Make backups of files on the server(s) and client(s).
2. Be sure that your IT Service Vision software is Release 2.3 or later.
3. Save a copy of the table containing the site you have defined for administration in the previous release.

    ▪ For Release 8.1 of the SAS System, you may find this table at
       `drive:\[SAS Install Path]\cpe\chm\ec\ecsite\ec_sites.sas7bdat`.
    ▪ For Release 6.12 of the SAS System, you may find this table at
       `drive:\[SAS Install Path]\addon\cpe\chm\ec\ecsite\ec_sites.sd2`.

    You will need this table to replace the default `ec_sites` table provided by the newly installed Release 2.3 in order to recover the site definitions from the previous release.

4. Install IT Charge Manager Software, Release 2.3 as instructed in the "Installation" section of this document. You may click on the **About IT Charge Manager** button in the upper right corner of the **Welcome to IT Charge Manager** window to verify the version.
5. You may notice that **IT Charge Manager Demonstration** is the only site defined in the **Site Selection** list box in the **Welcome to IT Charge Manager** window. To recover your site definitions from the previous release, you should exit out of IT Charge Manager Software, Release 2.3 and proceed to the next step.
6. Go to the folder where IT Charge Manager Software, Release 2.3 is installed and replace the default `ec_sites` table by the one you saved in step 3.
7. Launch IT Charge Manager Software, Release 2.3 again. The **Site Selection** list box should have recovered your site definitions.
8. This step describes how you may convert each site from the previous release into Release 2.3.
    a. Select a site and open it.
    b. Under the **Site Administration** tab, click on the **Manage Site Defaults and Accounting Calendar** button. Click on the **Calendar Definitions** button in the sub-window on the right. Click on the **OK** button after verifying the calendar definitions for this site. This is to update the definitions and upload them to the server. This step is required to ensure the correct regeneration of the calendar definitions via Release 2.3.
    c. Choose a PDB of the site and select the **Manage PDBs** tab. Click on the **Data Base Definition** button on the right. You need to click on the **OK** button so that Release 2.3 may run the **Data Base Definition** job (`CPDDUTL`) to update the dictionary. IT Charge Manager Software, Release 2.3 has increased the length from four to eight bytes for the variable `MACHINE`, which stores the machine name of the site. If your site currently uses machine names with a length greater than four characters, your machine names may have been truncated. Please contact SAS Technical Support to determine how to deal with truncation situations.

        If OS/390 is the server, you must disconnect from the site in IT Charge Manager Software, Release 2.3 for the **Data Base Definition** job to complete. IT Charge Manager Software, Release 2.3 automatically detects this and presents a window to facilitate the disconnection as soon as you submit the job.
    d. Disconnect from the site.

Using IT Charge Manager Data with Enterprise Reporter Software

IT Charge Manager Software, Release 2.3 provides sample data and report templates to be used by Enterprise Reporter software. Full details on using IT Charge Manager data with Enterprise Reporter software are in the chapter on "Data Exploration and Reporting" in the *IT Charge Manager User's Guide*.