HELPSTAR 2012 TO SERVICEPRO CHANGE LOG

Help Desk Technology

Confidentiality Note

This document contains confidential information which is proprietary to HELP DESK TECHNOLOGY INTERNATIONAL INC. In consideration of receipt of this document, the recipient agrees to maintain such information in confidence and not disclose this information to any party outside of the recipient's organization. This information may not be reproduced or displayed to any other party without the written consent of HELP DESK TECHNOLOGY INTERNATIONAL CORPORATION, INC

HELP DESK TECHNOLOGY INTERNATIONAL CORPORATION, INC shall not be held liable for any technical or editorial errors and omission contained herein, nor any damages directly or indirectly arising from this document.

CONTENTS

APRIL 2014

Administration of ServicePRO Objects

Design Changes

- Dispatch Folders will not appear in the "Assign Reps to Queue" option (Enterprise only).

- A Support Rep inbox folder will not be created unless a user is assigned to a queue folder at the time of assigning the Support Rep role.

- Backup Database, Backup File Manager, SQL Logins has been removed from ServicePRO. Database management should be handled from SQL server.

- Meeting and Appointment options from a ServicePRO Object's properties are no longer available

New Features

- The Display Name field has been added to the User Properties window.

- A filter for Display Name has been added the "Find a User" window.

- Display Name is available for use in the Active Directory Synchronization Field Mappings

- When a requester appears, if the Display Name is different than login name, they will appear in the following syntax: Display Name (Login Name)

Active Directory Synchronization

Design Changes

- When pulling domains for import, the results are fetched from the server and not the local client.

- Label for "Authentication for Windows Client" has been renamed to "Authentication for Support Rep Portal".

- Label for "Authentication for Web Client" has been renamed to "Authentication for End User Portal'.

Assets and Discovery

Limitations

- When using the Quick Find option, a user must expand down the node on the tree to access the asset. In Windows Client, the Find Next button would expand the node down for a user.

- The Audit my Current Workstation feature cannot be performed on a MAC operating system.

Attachments and Document Management

Design Changes

When attempting to encrypt an attachment, the encrypt option will only be enabled if you are logged in with a user with a passphrase that has been configured.

Business Rules

Design Changes

- Validation of blank criteria filters will only happen at save time. When adding new criteria, will not automatically open the filter pop-up.

- Service Statistics Calculations are:

  - **Current Time in Dispatch**

    o Request is placed in dispatch – Current Time in Dispatch resets to 0

    o Request status changed to anything other than Dispatch – Current Time in Dispatch is paused

  - **Current Time in Service**

    o Request is moved to In Service – Current Time In Service resets to 0

    o Request is made inactive (WFR, Schedule, Suspended) – Current Time in Service is paused

    o Request with Status "In Service" has the wait state set to ASAP – Current Time in Service resumes

  - **Current Time since Update by User**

    o Request is updated by a user – Current Time since Update by User resets to 0

    o Request is made inactive (WFR, Schedule, and Suspended) – Current Time since Update by User is paused

    o Request wait state changes to ASAP via Business Rule or Starwatch – Current Time since Update by User resumes

  - **Current Time in Waiting for Response**

    o Request is set to Waiting for Response - Current Time in Waiting for Response reset to 0

    o Request Wait State changed to Scheduled, Suspended, or ASAP - Current Time in Waiting for Response is paused

  - **Current Time in Suspense**

    o Request is set to Scheduled or Suspended – Current Time in Suspense resets to 0

    o Request Wait State changed to Waiting for Response or ASAP - Current Time in Suspense is paused

  - **Request is in In Service**

    o Request in service moves from rep to team/same rep - no change to Current Time in service

    o Request in service moves from rep to another rep - Current Time in service resets to 0

- o   Request in service moves from rep to team only (no rep selected) - Current Time in service resets to 0

New Features

- The Responsibility variable has been added to the TO: variables and Subject variables for Email Notifications/Templates.

Calendaring

DESIGN CHANGE

- The Update role is no longer a requirement for the ability to view a Shared Calendar in HelpSTAR's calendar. It will be based on Users Options > Shared Calendar settings

Limitations

- Shared calendars cannot be displayed in different colors. Only headers of these calendars have different colors.

New Features

- Creating a new appointment or meeting from a Service Requests or Purchase Request will open the new appointment/meeting form (previously, it would open the calendar module)

- Preview Pane will allow you to view availability of recipient of the invitation

- User can manually change the meeting time

- Messages associated with meetings can now be submitted from the Email Inbox

- As attendees are entered to be invited, their availability will be displayed on the right side

Chart Designer

Changes

- Module has been redesigned.

- Existing Dashboard charts will not be carried over to ServicePRO; they will need to be recreated.

Limitation

- Secondary groupings for pie charts and line charts are disabled.

Communications

New Features

- Reminders interface has been modified. A search box has been added to locate a user. Also, an image set for that user in User Options will also appear in this search.

- When messages (such as Quick Message, Document Message and Reminders) are set to "Snooze" and reactivated later, it will display the reactivation time with the label "Time Reactivated:" in the grid list and tooltip.

- In other cases, "Time Sent:" will be displayed instead.

Custom Fields

Limitations

- You cannot copy and paste all contents in the object properties tab at once using mouse/keyboard controls; however you will be able to copy and paste one object at a time.

- To copy all contents of the current tab at once, use the option "Output to Text File" from the Ribbon Menu.

Dashboard

Design Changes

- The Dashboard Designer option is no longer required in this version. You can edit and view charts that should appear in your dashboard from the same window.

- Pre-populated charts will be added to the Dashboard.

Data Analysis and Queries

Design Changes

- Any custom reports generated in versions before or during HelpSTAR 2012 are considered "Legacy Reports". The User will still be able to preview and schedule these reports for auto-generation within ServicePRO. In addition, the HS2012 reports will be listed with a grey icon in order to differentiate from the ones created in ServicePRO.

- When exporting a report from ServicePRO, the "Microsoft Excel 97-2000 – Data Only" option is no longer available.

- Custom views are loaded similarly to how they load in queries.

- The HelpSTAR Administrator role grants the ability to delete another user's public charts/Reports/Queries. This way, if an individual leaves the company and their public queries/reports/charts need to be cleaned up, the administrator will be able to perform these actions.

    o The HelpSTAR Administrator is not allowed to update another user's public charts/reports/queries

- The Print option has been removed from legacy reports. This report can be printed from Adobe Reader after opening.

- Regular reports are listed in blue font and legacy reports are in listed in grey.

- The Reminder option has been removed from the Context menu when right-clicking a request from Preview Query Results.

- Regular queries can no longer be exported to Excel as raw data. CSV export options have been added to the ribbon as a replacement.

- Hardware Queries no longer have Excel export functionality. Options for exporting queries as PDF and CSV have been added as a replacement for Excel exporting.

Discovered Hardware

Limitation/Design Change

- Users will not be able to right-click to open properties for multiple selected discovered hardware at the same time. Only property is viewable for one user or asset at a time.

Documents

Design Changes

- The tree that appears in Documents is consistent with the Workspace tree for service requests.

- Documents File Listing under Documents tab has been changed to single-line view to be consistent with other areas in the application.

Limitations

- Forms related controls will not show up with the .htm preview in a Documents Preview

Email Inbox

Design Changes

- While using EWS Mail Server for configuring User Email Inboxes, whenever the user changes his/her NT Password (& hence outlook/exchange password), the password needs to be updated in the Email Account Settings for the user.

- Loading emails into Email Inbox are on demand

- The option in both User Options and Systems to download latest X number of items in email inbox has been removed. By default, 20 emails are loaded and then next 20 are loaded on demand (when a user scrolls)

- Messages or meeting messages can be responded to from the Email Inbox

- Upgrading from HelpSTAR 2012 to new version will convert all MAPI profiles to EWS

- Email inbox will be opened in a separate window

- Clicking on the Alert Prompt for new emails in the Email Inbox will bring the focus to Email Inbox (not open the email itself).

- Users assigned the Update role will have access to the Email Inbox feature. In previous versions, only Dispatch and/or Support Rep roles allowed access to these features.

Limitations

- Reply option is not available when emails are downloaded again when using POP3

- Reply option is not available in ServicePRO if email was responded to outside of ServicePRO such as in Outlook for POP3/IMAP

- Links that appear in an email body can only be opened via CTRL + Click

- Searched text cannot be highlighted in the email inbox

- Responding to a meeting invitation from an email inbox will not remove the meeting invitation from the list of emails when using IMAP/POP3

- Emails imported using POP3/IMAP protocol will all appear as read although some are unread in the mail inbox

- Shared mailboxes are not supported between a user with POP3/IMAP and a user with EWS

- Sent items in Outlook are updated only when using EWS

- The ability to search on Sent Date is only available when using POP3/IMAP

Email Notifications – Rules & Project Templates

Design Changes

- The 'From' Parameter has been added to allow clients to choose which email account a Business Rule or Project Template sends an email from, for any Email Template.

End User Portal

Limitations

- AD Sync:

    o   Primary Email Accounts will not be grayed out when imported using AD Sync

    o   HelpSTAR password fields will not be grayed out

    o   With HelpSTAR login disabled in AD Sync, users are still able to change their HelpSTAR logins

Grid Search and Search Engine

Design Changes

- In order to close the ServicePRO Search Engine, you will have to remove all words or on the X option of the Search Engine.

- Functions (such as the Business Rule Designer) are no longer searchable by the Search Engine.

- Searching through ServicePRO's Search Engine will not begin until Enter key is pressed.   This will replace as you type or click on the browse icon.

- There is a 3-click sort option for sorting of columns in a view. First click will sort in ascending order. Second client will sort in descending order. Third click will remove the sort

- Cut/copy/paste functionality has been added to ServicePRO Search control, and can operate through a context menu when right-clicking a search textbox.

Limitations

- Only single-line views are available in grids for Service Requests.

New Features

- Search item will be highlighted in red and in bold font.

- You can now cancel an active grid search with a "close" button.

- Search Filter will still be applicable if clicking between folder views unless it has been cleared.

- A right click option has been added to the search engine results view. You can select this option to open your results in a new static window.

- When you want to copy text from the search box, the user can right click on the Search box and select Copy. This will copy the entire contents of the search box.

- When you want to remove all text from the Search box, the user can right click on the box and select Cut. This will remove all text from the Search box and cancel any pending searches. This is necessary to keep the state of the Search control consistent.

Import Utility

Design Changes

- The Import Utility will not be an available option on the Administration tab of Setup/Administration. In order to launch the import utility, you will have a separate stand-alone desktop utility to run.

Knowledge Management

Design Changes

- If a Suggested Solution has been added to a Service Request, this Suggested Solution will appear on the "Current Updates" tab.

New Features

- When adding new Keywords for Best Solutions, they will be added into the current list alphabetically.

Loads Module – Link to Calculate Average Time in Service

Design Changes

- The Average Time in a Queue/Service for all OUs, Support Reps and Teams will not be available when a page loads for the first time.

- Every node will have "Click to compute" option in Average Time column.

Manage Assets

Design Changes

- Deactivating an asset now displays a form rather than a message prompt. This is useful when deactivating multiple assets.

Memo Editor

Design Changes

- Memo Templates options have been removed from the context menu, and added as a button in Memo Editor's toolbar.

Memo Templates

Design Changes

- The Responsibility variable has been added to available template variables.

Object Designer

Design Changes

- The User Defined Field designer is now called the Custom Object Designer

Limitation

- The Copy option is disabled for any Function fields.

- When copying and pasting tabs, Function fields will not get pasted to a new tab. A prompt will appear to notify that it was not pasted. This field will have to be re-created on the new tab.

- Adding a Radio button of any type does not show the items in the designer page until it is saved.

New Features

- Additional graphic elements have been added such as borders, vertical lines and images

- You will have the option to modify the size and shape of a field

- The properties of each field will be displayed on the right pane of the Object Designer

- Radio buttons are now an option

- Grid-based interface for side by side field design

- Caption creation is available in the Object Designer

- Formulas on fields has been added as well

- Ability to associate a custom service request type with a sub category

Projects, Quick Requests, and Quick Request Templates

Design Changes

- When creating a new Quick Request, the requester field will be populated with the user who is creating the new quick request. If a user would like to search for a user, they must click on the search icon to launch the Find a User window.

- If you select a request that you are not authorized to view in a project, a message prompt will appear notifying you. It will also appear in the pane where the service request is usually viewed.

- Users can now detach requests from projects and open it or move it to another designated folder.

New Features

- The Responsibility variable is available for Project or Quick Request notifications

- The "Convert to Project" option has been added to the Project button menu in the Ribbon Toolbar of Update mode. It will only appear if it is not already part of a project

Purchasing Requests

Design Changes

- In Product Detailed Information for Received view, Product Detail information is now displayed in item grid format. In ServicePRO it is possible to allocate the item right inside the grid

Limitation

- A product added to a purchase request cannot be modified or added to in the Approval view of Purchasing. A user must open the Purchase Request in detailed update mode to make modifications.

Recent

Design Changes

- A user can double-click the request to open in Details mode to view the request from this menu.

- Unpinned Items

    - o New – An item is added to the top of the Unpinned items list when a Request, Document or Appointment is viewed through a particular module such as Service Request, Documents or Calendar.

    - o UnPin to Pin – If an Unpinned item is Pinned from Recent module, then this item will come at top of Pinned list, and be removed from the Unpinned list.

- Pinned

    - o New – When an item is Pinned, it will come at top of the Pinned items list. If this Pinned item is the 26th item in the list, then there will be a warning prompt stating "You have exceeded the limit for the pinned items". The user must Unpin another item to Pin this one.

    - o Pin to Unpin – If a Pinned item is Unpinned from Recent module, then it will come at top of the Unpinned list, and will be removed from Pinned list.

Limitations

- There can be a maximum of:

    - o 25 Pinned Items

    - o 25 Unpinned Items

- Documents shown in Recent Documents are not from the corresponding Requests in the Recent List, but are items accessed or pinned from the Document Listing

- Appointments or Meetings shown in Recent Appointments are not from Requests in the recent list, but actually those pinned from the calendar

Refresh Timer Settings

Design Change

- For the Items that refresh automatically in the Home Page (i.e. Status Bar, Action Items, Announcements, Workspace, or Calendar), any changes made to the refresh interval for these items in User Options will require the user to log out and log back in, in order for the new refresh interval to take effect.

Reports

Design Changes

- Any custom reports generated in versions before or during HelpSTAR 2012 are considered "Legacy Reports". The User will still be able to preview and schedule these reports for auto-generation within ServicePRO. In addition, the HS2012 reports will be listed with a grey icon in order to differentiate from the ones created in ServicePRO.

- With StimulSoft Custom Reports, the user cannot pull fields directly from the Database by making a custom Open Database Connection

- Users can create a copy of the Legacy Report filter criteria, and add it to a new Stimulsoft Custom Report. However, the Legacy Report cannot be updated directly from ServicePRO, nor will the user be able to pull fields directly from the Database requiring an ODBC connection.

- In System Options, Admins can set a limit for the number of reports generated when searching under a certain criteria. Users will receive a warning when the number of records fetched for a report exceeds this set limit, telling them it will take a considerable amount of time to generate.

- Alphanumeric ranges to filter standard listing reports are now available.

Roles Based Access Control (RBAC)

Design Changes

- The Update role is no longer required to view a shared calendar. These permissions are set in User options.

- Users without roles assigned will not be listed in the Role Based Access Control tree under the Users Node. Only users with existing roles will be listed. You can locate a user to add roles via the "Find" option.

- Users assigned the Update role will have access to the Email Inbox feature. In previous versions, only Dispatch and/or Support Rep roles allowed access to these features.

- The Support Rep role is required to use the Chat module in ServicePRO.

- Dragging a queue folder to rep tree now expands the rep nodes automatically in ServicePRO, instead of having to manually expand the nodes.

Screensharing

- New addition to ServicePRO

    o Can switch which participant of Screensharing is the presenter of the session

    o Can share keyboard and mouse controls

    o Ability to access one or more remote desktops

    o You can initiate a file transfer from Screensharing

    o Can initiate a chat via Screensharing

    o Can remotely lock or unlock screen via CTRL+ALT+DELETE command

    o Can remotely launch reboot a machine and reconnect once rebooted

Limitations

- Currently only supported in Windows

Service Requests

Design Changes

Time-related

- Background Refresh will not function on inactive windows (windows that are minimized or tagged). Background Refresh will resume as scheduled when the window is maximized.

Instances and Windows

- When using multiple windows, a single request can only be viewed in either update or detailed mode.   2 windows of the same kind of request view cannot be opened.

- Multiple instances of a new request can be opened.

Memos

- Pending updates will no longer be appended to the bottom portion of the memo field. They will appear on an additional tab called "Current Updates".

- The Reset option has been removed from the right click option menu of the memo editor.

- Pending updates from Detailed Mode have been modified. Any trace memos will be added under "Memo Updates".

- The Transactions Filter option available on each memo update to a service request has been removed. An "Activity Type" button has been added to the ribbon toolbar to filter out a particular activity type.

- Next and Previous buttons will allow scroll to the next recorded memo or transaction in the viewport, if not visibly displayed.

UI Layout

- Request Details have been split up in 2 separate tabs. Request history can be viewed on the "Activity Stream" tab and Details can be viewed on the "Request Properties" tab.

- The options to Save, Pin and Attach have been moved from the Quick Access Toolbar and added to the ribbon toolbar of a request.

 "Move To" Functionality

- The "Move to Rep's Inbox" option will list inbox folders instead of listing support rep names.

- "Move to Dispatch" option will only list dispatch folders (not entire Organizational Hierarchy).

- "Move to Folder" option will list only queue folder objects.

Other Functionality

- Double-clicking a request will open a Service Request in update mode.

- The Properties option on the Lookup/Search tab of a service request is no longer available.

Other Visual Changes

- Priority colors (as set in User Options) are not displayed in the fields for urgency or priority. These colors are represented in a view of requests such as Workspace or In Queue.

- These fields have been renamed as follows:

  - o   Current Location is now called Folder.

  - o   Assign Responsibility is now called Responsibility.

Assets

- To add an asset to the Asset field of a service request, a user must select browse to locate an asset to insert to a service request. In previous version, it could be keyed into the field.

Requester

- When changing a requester in Details mode of a service request, the Find User window will automatically be launched. This replaces the options of "New User", "Find User" and current user.

Begin Work

- If the Begin Work status is not valid for a selected queue folder, the default Begin Work value will be selected automatically for a request being forwarded to this queue. In HelpSTAR 2012, a user was asked if they would like to set it to the default value.

Saving

- Selecting the "Save" button is now required after Suspend, Waiting for Response, Close or Scheduled operations are performed on Service Requests.

Limitations

- HTML copy and pasting is not available on a MAC.

System Email Accounts

Design Changes

- Group-wise Protocol support not added to next release. Option has been removed from System Email Accounts

New Features

- The Responsibility variable has been added to the memo variables available to be used in Reply Messages and Outgoing Request Updates.

User Licensing and Multiple Instances of ServicePRO

Design Change

- The named License User will not be able to log into more than one instance of ServicePRO instance at the same time.

- i.e. Bob Stevens logs into ServicePRO with Internet Explorer. Later, he logs into ServicePRO with Firefox, with the same username and password. The Internet Explorer instance will initiate a Kick Off sequence, prompting him with a countdown to log out, and he will continue to be logged in the Firefox instance.

User Option

Design Changes

- The Update role is no longer a requirement in the ability to view a shared calendar in ServicePRO's calendar. It will be set based on a user's options > Shared calendar settings.

- No user option exists for multiple windows. Since the application is web-based, multiple windows/tabs are required.

- The option in both User Options and Systems to download latest X number of items in email inbox has been removed. By default, 20 emails are loaded and then next 20 are loaded on demand (when a user scrolls).

- Tabs for In Office and Off Site options have been removed from User Options. A user can select to override setting set in System Options to set their own.

Limitations

- The color picker for Priority and Windows does not offer the ability to define custom colors. The options are limited to a standard set of colors.

New Features

- A user can set the default System Email Account that will be used via the Send Email option regardless of whatever is the default account set in System Email Accounts.

Views

Design Changes

- The Support Rep tab has been removed from the following views:

    o Timesheet
    o In Queue
    o Alerts

Windows Behaviour

Design Changes

- Inactive Window Behavior – When another browser window in not active (minimized or tagged), a background refresh flag will be marked as inactive and stop the background refresh from running. When a user navigates to that window again it will trigger the pending background refresh. At this time, it will display all the requests that still match the status/criteria specified in that view.

- Right-click mouse click will bring up a context menu if one is available. Left click mouse clicks will not show any options.

Limitations

- A traditional save prompt when exiting a work area is not available. It will prompt you to leave or stay on a page.

Workspace

Design Changes

- When an automatic workspace refresh occurs, new items added to your workspace will appear at the top of your workspace (versus the bottom in HelpSTAR 2012).

- Transactions tab in the preview pane of a service request have been renamed to "Activity Stream".

- Grid searches will highlight a word in blue for their results.

- When viewing the Workspace for a support rep, it will only factor in requests in a specific support rep's In-Service.

- When viewing the Workspace for a team, it will only factor in requests that have directly assigned to a team.

- When view the Workspace for a user's service under a team, it will factor requests assigned directly to a user as well as to the team.

- When a request is deleted from your Workspace, it will be denoted in a red font. Also, a prompt will be given to let a user know the request no longer exists.

- When using the "Opened" option of Management Views of the Workspace, the default view will choose Today's date for results. In previous versions, you would receive a Date Range prompt.

Limitations

- Only single-line views are available in grids for Service Requests.

- If a request is moved, it will appear in red and bold font

New Features

- Tabs in the preview pane of a Service Request can be docked to other areas of the workspace.

- If an item is removed from the Workspace, the listing will automatically be refreshed. Manually pressing refresh is no not required to remove the item from the listing.
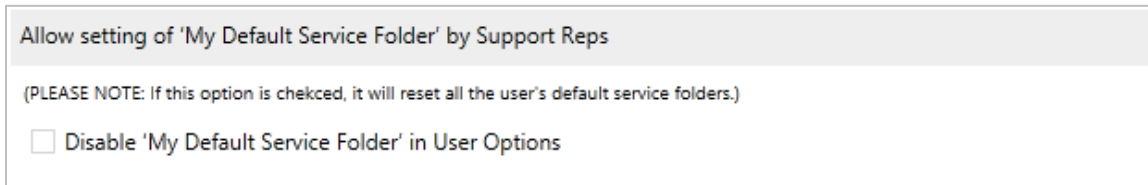
JULY 2015 – VERSION 14.1.1.16

User Options

Design Changes

ENABLE/DISABLE MY DEFAULT SERVICE FOLDER IN USER OPTIONS

ServicePRO features a System option for enabling or disabling the availability of 'My Default Service Folder' under User Options.
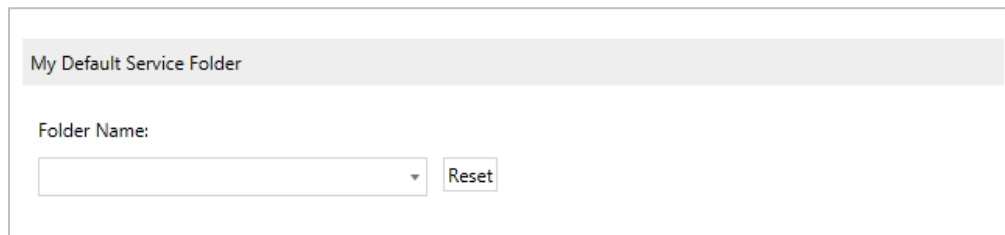
Allow setting of 'My Default Service Folder' by Support Reps

(PLEASE NOTE: If this option is chekced, it will reset all the user's default service folders.)

☐ Disable 'My Default Service Folder' in User Options

If the administrator leaves this option unchecked (the default setting), 'My Default Service Folder' in User Options will be enabled. Users will be provided with an option to reset and empty the selected Default Service Folder.

My Default Service Folder

Folder Name:

[▼] [Reset]

This behavior will also affect the Assign Work dialog window; if the user is trying to assign a request to 'Myself' (i.e. to his own service) and the request currently resides in a folder where they do not have Support Rep role assigned:

- ServicePRO will first check if there is a Default Service Folder set. If there is a default service folder set, the application uses it (i.e. sets the location for the request to that folder).

- If a Default Service Folder has not set by the user in User Options, it will prompt the user to select a folder from the list of Available Folders support rep permissions are available. While selecting the folder for assigning to that User's service, Users will also have the opportunity to set the folder their own default service folder.

If the administrator enables this system option, the 'default service folder' value for all users will be reset. The 'My Default Service Folder' option in User Options will also be disabled for all the users under User Options.

If a user attempts to assign a request to 'Myself' (i.e. to their own service) and the request currently resides in a folder where they do not have Support Rep roles assigned, then the User will be prompted to select a folder from the list of Available Folders where they have been granted support rep permissions.

In addition, under the Available Folders dialog, the checkbox for setting the currently selected folder as the 'Default Service Folder' will be disabled.
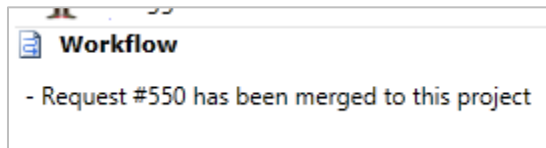
Workflow Memos

Design Changes

CHILD AND PARENT REQUESTS – TRACE IN CHILD REQUEST WHEN MERGED TO PARENT REQUEST OR SPLIT FROM PARENT REQUEST
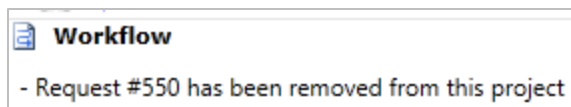
When creating or updating requests, the options to "Merge to a Parent Request" and "Split from Parent Request" will now add a Trace memo in the Parent request only.

PARENT REQUESTS

- Merge

- Split from Project

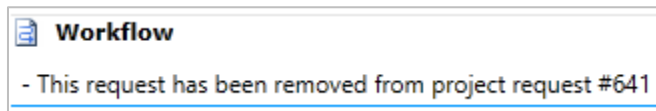   o This new implementation will also add the trace memo option in child requests as well

CHILD REQUESTS

- Merge

- Split from Project

New Features

CHILD AND PARENT REQUEST MEMOS – UPDATE MEMO ON ALL CHILD REQUESTS WHEN THE PARENT REQUEST'S MEMO IS UPDATED AND CLOSED

General System Options features a new setting that allows Administrators to set memo update behavior in child requests upon closing parent requests. This affects whether or not the final memo in the closed parent requests will also be populated into the memos for each child request.

- No – No action will be performed; upon closing the Parent Request, the final memo in the Parent Request will not also be populated in all Child Requests (default setting)

- Yes – The final Parent Request memo will be populated in all Child Requests upon closing the Parent Request.

- Prompt the User – Allow the user to choose if the final Parent Request memo should be populated into all Child Requests when the Parent Request is closed.

Prompt the User Setting

If the administrator has selected the option "Prompt the user", in ServicePRO, the prompt below will be shown when the user tries to close a Parent Request with a memo update.

If the admin has selected the option "Prompt the user", in ServicePRO Cloud9, the warning prompt below will be shown when the user tries to close a parent request with a memo update. The user will also need to check off the appropriate option and click on the Save icon in the toolbar option again to proceed with saving the request.
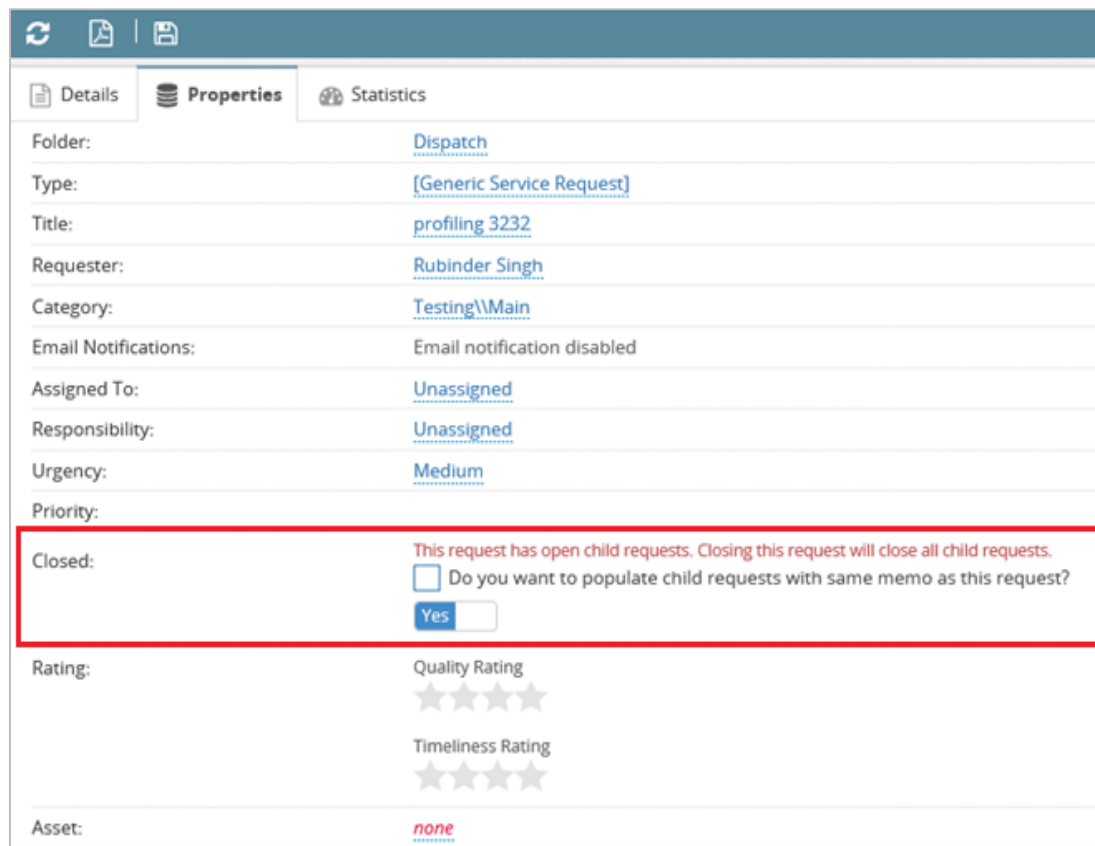
OPTION TO REMOVE TRACE IN THE WORKFLOW MEMO

The "Trace" option in the Workflow Memo can be disabled from the Activity Type listing.
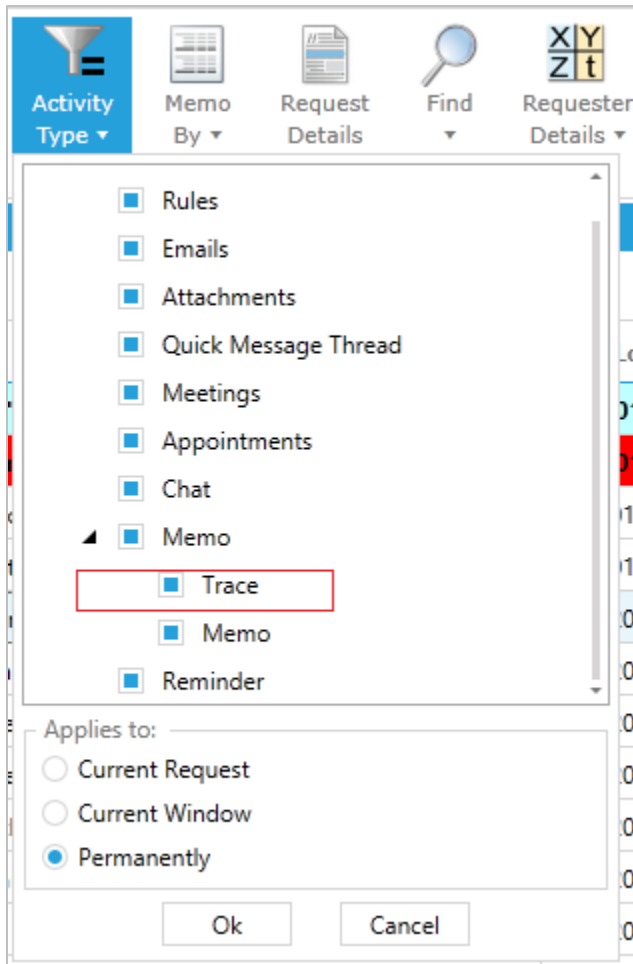
Standard Reports

New Features

NEW STANDARD REPORTS: DETAILS FOR RULES AND REPORT SCHEDULES

Two new Standard Reports have been implemented:

- Custom Report Schedule details

- Rules Schedule details

Examples of these reports are shown below.

Lakspur
Custom Report Schedules Report
Includes Reports Starting With a Letter From 'A' to 'X'

Owner Name: Peter Adams

Report Name: Helpdesk Overview report	
Occurs: Daily	Every 1 day(s)
Frequency: Occurs once at 08:00:00 AM	
Range: Start: 06/05/2015	
No End Date	
Public/Private: Private	
Recipients: Joanne Leal	

Report Name: Timesheet	
Occurs: Weekly	Every 1 week(s) on Monday, Tuesday, Wednesday, Thursday, Friday
Frequency: Occurs once at 06:00:00 PM	
Range: Start: 06/05/2015	
No End Date	
Public/Private: Public	
Recipients: Peter Adams	

Total count of reports for Peter Adams: 2

Prepared 6/5/2015 10:10:23 AM   By Peter Adams   Page 2 of 2

Lakspur
Rule Schedules Report
Includes Rules Starting With a Letter From 'A' to 'X'

⌂SERVICE**PRO**

Folder: Auto Routing Rules

Rule Name:	Auto Route European Requests
Description:	
Status:	Running
Occurs:	Daily Every 1 day(s)
Frequency:	Occurs every 1 Minute(s) Starting at 08:00:00 AM Ending at 11:59:59 PM
Last Time Rule Ran:	10/29/2013 12:58:57 PM

Rule Name:	Auto Route Facilities Requests
Description:	
Status:	Running
Occurs:	Daily Every 1 day(s)
Frequency:	Occurs every 2 Minute(s) Starting at 12:00:00 AM Ending at 11:59:59 PM
Last Time Rule Ran:	10/29/2013 12:57:49 PM

Rule Name:	Auto Route New Employee Requests
Description:	
Status:	Running
Occurs:	Daily Every 1 day(s)
Frequency:	Occurs every 2 Minute(s) Starting at 12:00:00 AM Ending at 11:59:59 PM
Last Time Rule Ran:	10/29/2013 12:57:50 PM

Rule Name:	Auto Route North American Requests
Description:	Auto Route North American Requests that have been in Dispatch for over 5 minutes
Status:	Running
Occurs:	Daily Every 1 day(s)
Frequency:	Occurs every 1 Minute(s) Starting at 08:00:00 AM Ending at 04:59:59 PM
Last Time Rule Ran:	10/29/2013 12:58:58 PM

Total rules in folder: Auto Routing Rules: 4

Prepared 6/5/2015 10:13:12 AM   By Peter Adams   Page 2 of 11

Lakspur
Custom Report Schedules Report
Includes Reports Starting With a Letter From 'A' to 'X'

ServicePRO

Owner Name: Peter Adams

Report Name: Helpdesk Overview report	
Occurs: Daily	Every 1 day(s)
Frequency: Occurs once at 08:00:00 AM	
Range: Start: 06/05/2015	
No End Date	
Public/Private: Private	
Recipients: Joanne Leal	

Report Name: Timesheet	
Occurs: Weekly	Every 1 week(s) on Monday, Tuesday, Wednesday, Thursday, Friday
Frequency: Occurs once at 06:00:00 PM	
Range: Start: 06/05/2015	
No End Date	
Public/Private: Public	
Recipients: Peter Adams	

Total count of reports for Peter Adams: 2

Prepared 6/5/2015 10:10:23 AM   By Peter Adams   Page 2 of 2

Request History

New Features

OPTION TO SEND REQUEST HISTORY VIA EMAILING AS EITHER .TXT FILE OR PDF

Implemented email history to be sent as either PDF/Text depending on system options:

- OptionID: 16897 (LngValue: 0 = Text, 1 = PDF)

  o By default, value is 0 (text)

- Use SQL management console to update this setting:

- To email history in PDF:

  UPDATE tbloptions SET LngValue = 1 WHERE OptionID = 16897

- To email history in TXT:

  sasUPDATE tbloptions SET LngValue = 0 WHERE OptionID = 16897

Update – Option

New Features

UPDATE – OPTION TO ALLOW PAST DUE BY

Implemented validation behavior for request due by that can be controlled by tbloptions

- OptionId: 16899 (LngValue: 0 = Disallow, 1 = Warning, 2 = Allow)

- To disallow past the "due by" value (current default behavior in ServicePRO/Cloud9)

  o UPDATE tbloptions SET LngValue = 0 WHERE OptionID = 16899

- To show a warning message (will show a prompt in ServicePRO only; Cloud9 will show a warning in the property tab)

  o UPDATE tbloptions SET LngValue = 1 WHERE OptionID = 16899

- To allow past "due by" value (no prompt displayed)

  o UPDATE tbloptions SET LngValue = 2 WHERE OptionID = 16899

Workspace View

Design Changes

WORKSPACE VIEW/ORGANIZATIONAL HIERARCHY – BEHAVIOR CHANGE WHEN PERFORMING DRAG-AND-DROP OF REQUESTS TO A NEW QUEUE

In **Workspace View** and **Organization Hierarchy**, currently selected folders will remain selected after a drag-and-drop action is performed.

Active Directory Configuration

Design Changes

ACTIVE DIRECTORY CONFIGURATION – ALLOW ENTERING THE OU/GROUPS/UNITS PATH DIRECTLY INSTEAD OF HAVING TO LOAD THE AD TREE

When trying to add Active Directory (AD) Units/Containers/Groups to import, instead of loading the AD tree by default, the newly implemented '**Enter Active Directory Path manually'** option will be loaded by default, while listing all the node paths that were previously selected.

This will allow the administrator user to enter the AD Unit/Container/Group path manually, while choosing an object type and including all appropriate children flags. A sample valid path will be provided in the dialog itself.

When the client's environment has a large AD domain structure with great number of OUs and Distribution Groups, this will allow them to easily enter the required configuration.

If the administrator user wishes to perform the selection through the AD tree, the user can switch to the option 'Choose from Active Directory tree'.
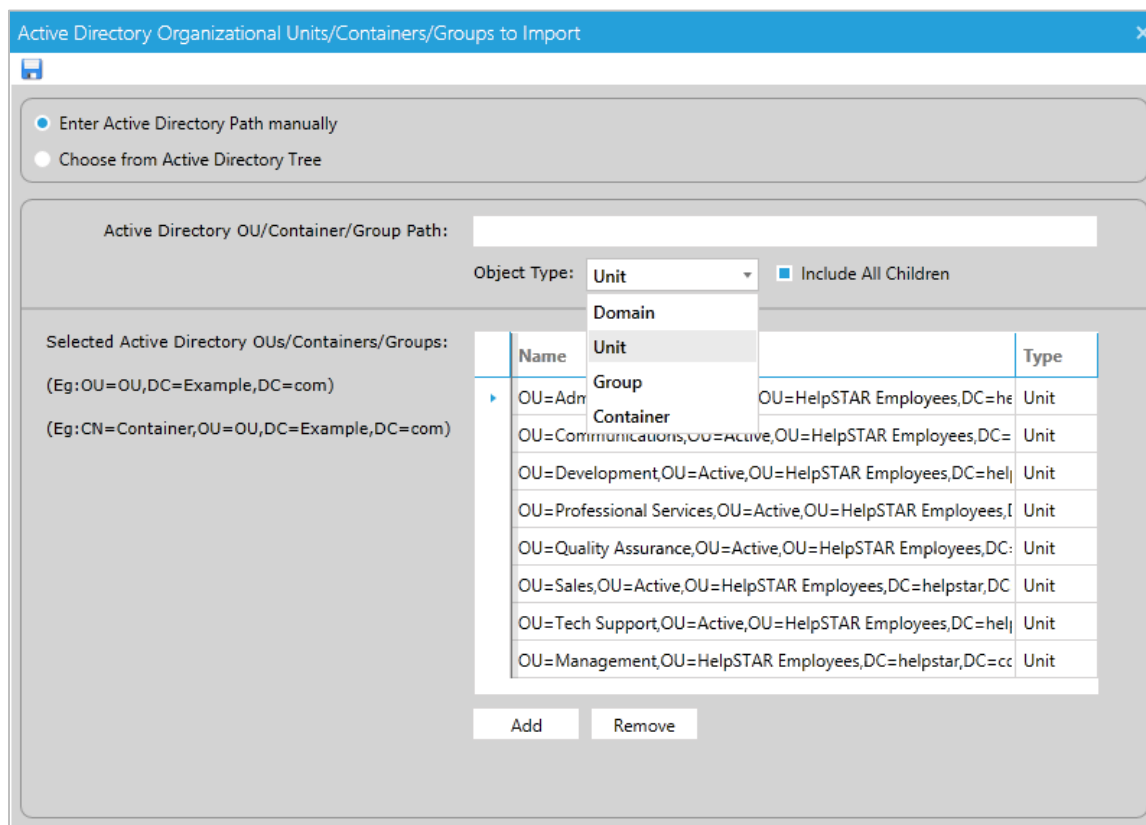
NOVEMBER 2015 – VERSION 14.2.1.12

Network Audit Engine/Auto Discovery

Updates and Design Changes

NETWORK AUDIT

In addition to 32-bit Windows Machines, the Audit Service now audits the following:

- 64-bit Windows OS machines

- Linux and MAC machines

- Devices such as Printers, Routers, Switches, Firewalls, UPS or Temperature Controls that are on the network

    o For auditing non-Windows Machines (Linux, MAC) and the devices, the service uses SNMP (Simple Network Management Protocol) Discovery.

MANAGE SNMP

In order to configure the fingerprint for the information to capture for network devices, MAC and LINUX machines during Auto Discovery, users need to setup SNMP Signatures in ServicePRO.

- Manage SNMP Signatures can be accessed from Assets/Configuration screen, and selecting **SNMP Signatures** under the **Auto Discovery** section of the ribbon toolbar

- Users can set up SNMP Details and Device Properties when adding a SNMP Signature

- For additional information on MIB/SNMP, please read: http://www.networkmanagementsoftware.com/snmp-tutorial-part-2-rounding-out-the-basics

DISCOVERED ITEMS LISTING REPORT AND DISCOVERED ITEMS SUPPORT REPORT

Under **Data Analysis > Reports**, two new report types are available from the Ribbon Toolbar:

- Discovered Items Listing Report – lists details on Discovered Hardware Items, including and devices

- Discovered Items Support Report – lists all details on Discovered Items associated with Service Requests

CHANGES TO AUDIT SERVICE AND AUDIT METHODS

- ServicePRO will no longer support the Client Audit Add-In audit method with the revised Audit Service. Only **Remote Auditing (RPC)** and **Audit-by-Login Script** are supported.

    o If there are existing Discovery schedules that use the '**Client Audit Add-In**' **Audit Method**, these schedules will be set to "Inactive" when the software is upgraded to the latest version, and these schedules will no longer be available.

- With Workstation selection for Audit Configuration:

    o **'Machine Name or IP Address'** scan mode option has been removed. Only Domain and IP Range workstation selection options are available. If there are existing Discovery Schedules set up with 'Machine Name or IP Address' scan mode, these schedules will be set to "Inactive" when the software is upgraded to the latest version, and these schedules will no longer be available.

    o With the **'Domain'** workstation selection, only one selection per Discovery Schedule can be made, out of the following options:

        - A Domain

        - An Organizational unit

        - A Group

    o When upgrading to the newest version, clients are advised to update all their existing Discovery Schedules configured using the 'Domain Tree' workstation selection mode. This is because exiting schedules will no longer work after upgrading, though they will still be available for editing from the user interface.

Query Designer & Business Rules

New Features
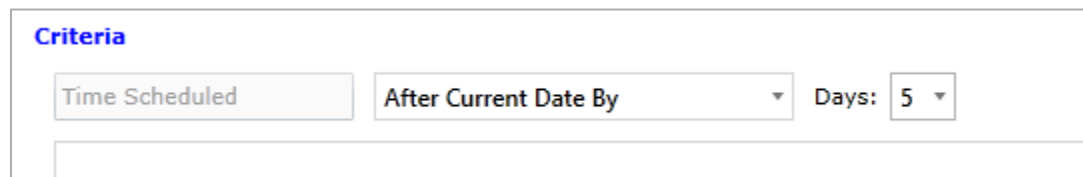
Run query or business rule based on additional criteria relative to current date in date field values

Queries and Business Rules can now be configured with new criteria in date/datetime fields, for both base (standard) fields and custom fields.

NOTE: Current date refers to the date on which the query or business rule will run.

1. **After Current Date By**
   - **Value**: 'X' Days

   - This criteria is met when the custom date/base date field value is **after the current date** by exactly 'X' Days.

   - **Example**:

     o If the current date is '12/7/2015' and the 'X' values is 5 days, then the condition will be met for all the requests for which Time Scheduled = 12/12/2015

   - **NOTE:** This criteria is not available for the following base datetime fields, as these date values cannot be in the future, and no requests will match the criteria to run the rule:

     - Time Logged

     - Time Closed

     - Time State Changed

     - Time Dispatched

2. **Before Current Date By**
   - **Value**: 'X' Days

   - This criteria is be met when the custom date/base date field value is **before the current date** by exactly 'X' Days

   - **Example**:

  o If the current date is '12/17/2015' and the 'X' values is 5 days, then the condition will be met for all the requests for which Time Scheduled = 12/12/2015

3. **Before Current Date By between**
   - **Values:** 'X' Days/hours/Minutes, and 'Y' Days/hours/Minutes
   - This criteria is met when the custom date/base date field value is **before the current date by a value ranging between** 'X' Days/hours/Minutes and 'Y' Days/hours/Minutes
   - **Example**:

  o If the current date is '12/15/2015' and if the value of X (minimum) is 2 days and the value of Y (maximum) is 5 days, then the condition will be met for all the requests with Time Scheduled is between 12/10/2015 (before current date by 5 days) and 12/13/2015 (before current date by 2 days).

   - **NOTE:** This criteria is available only for Datetime fields, and is unavailable for Date fields.

4. **After Current Date By between**
   - **Value**: 'X' Days/hours/Minutes, and 'Y' Days/hours/Minutes
   - The criteria is considered to be met when the custom date/base date field value is **after the current date, by a value ranging** between 'X' Days/hours/Minutes and 'Y' Days/hours/Minutes
   - **Example:**

- o   If the current date is '12/15/2015' and if the value of X (minimum) is 3 days and the value of Y (maximum) is 5 days, then the condition will be met for all the requests with Time Scheduled is between 12/18/2015 (after current date by 3 days) and 12/20/2015 (after current date by 5 days).

- **NOTE:** This criteria is not available for the following base datetime fields, as these date values in these fields cannot be in the future, and no request will match the criteria to run the rule

  - ▪   Time Logged

  - ▪   Time Closed

  - ▪   Time State Changed

  - ▪   Time Dispatched

- **NOTE:** This criteria is available only for Datetime fields, and is unavailable for Date fields.

NEW CRITERIA FOR DATE AND DATETIME FIELDS – WITHIN AND NOT WITHIN

The following 2 flexible criteria on date time fields have been added for Custom Fields in Queries and Business Rules. Previously, these criteria were already present for base datetime fields.

1. **Criteria Type: Within Last**

- This criteria type will shows all the request(s) where the requested custom field date time is within the 'X' Days/Hours/Minutes

  - o   **Field:** Custom Date Time Field only

  - o   **Condition:** Within Last

  - o   **Values:** 'X' Days/Hours/Minutes

- **NOTE:** For regular date time fields, this option has already been implemented

2. **Criteria Type: Within Next**
- This criteria type will shows all the request(s) where the requested custom field date time is within next the 'X' Days/Hours/Minutes

  - o   **Field:** Custom Date Time Field only

  - o   **Condition:** Within Next

  - o   **Values:** 'X' Days/Hours/Minutes

- **NOTE:** For regular date time fields, this option has already been implemented

The following 2 flexible criteria on datetime fields have been added for both base datetime fields as well as Custom datetime Fields in Queries or Business Rules:

3. **Criteria Type: Not Within Last**

- This criteria type will display all requests where the requested date time is not within 'X' Days/Hours/Minutes.

   o **Field**: Custom Date Time Field or Base Date Time Field

   o **Condition**: Not Within Last

   o **Values**: 'X' Days/Hours/Minutes

- **NOTE**: In the case of 'Time Statistics' fields, business hours will be taken into account while calculating 'X' Days/Hours/Minutes time

4. **Criteria Type: Not Within Next**
- This criteria type will display all requests where the requested date time is not within the next 'X' Days/Hours/Minutes

   o **Field**: Custom Date Time Field or Base Date Time Field

   o **Condition**: Not Within Next

   o **Values**: 'X' Days/Hours/Minutes

- **NOTES**:

   o This option is only available for all Custom Date Time fields, Time Due and Time Scheduled fields

   o This criteria is not available for the following base datetime fields, as these dates can never be in future:

      ▪ Time Logged

      ▪ Time Closed

      ▪ Time State Changed

      ▪ Time Dispatched

   o In the case of 'Time Statistics' fields, business hours will be taken into account while calculating 'X' Days/Hours/Minutes time.

Email Notifications

New Features

ADDITIONAL EMAIL NOTIFICATION VARIABLES

- New variables are now available when sending Email Notifications:

  o **Time Logged** – A variable for time/date logged

  o **Last Update User (Last Memo Author)**

  o **User Urgency** – A variable for the urgency of the request, set by the user.

Charts

Design Changes

SCHEDULING AUTOMATIC GENERATION AND EMAILS OF QUERY RESULTS

- Under **Data Analysis > Manage Queries**, Users can now configure Queries to be emailed on a scheduled basis, a function similar to emailing scheduled Custom Reports. This function can be accessed from the **Schedule and Email** icon added to the Manage Queries Ribbon Toolbar.

  o The **Schedule Tab** will allow users to set the day occurrence, time frequency, and date range for the scheduled emails.

  o The **Email Tab** will allow users to create accompanying email templates.

  o Email recipients will receive the auto-generated query results as Excel spreadsheet (.XLS) attachments.

SCHEDULE AUTOMATIC GENERATION AND EMAILING OF CUSTOM CHARTS

- Under **Data Analysis > Chart Listing**, Users can now email Charts on a scheduled basis, similar to the option for emailing Custom Reports. A **Schedule and Email** icon has been added to the Ribbon Toolbar for Manage Charts.

  o The **Schedule Tab** will allow users to set the day occurrence, time frequency, and date range for the scheduled emails.

  o The **Email Tab** will allow users to create accompanying email templates.

  o Email recipients will receive Charts as JPG image attachments.

Reports

New Features

STANDARD REPORTS FOR CHART SCHEDULES AND QUERY SCHEDULES

- Reports can now be generated for configured Chart Schedules and Query Schedules. These reports will feature details on Owners, Names, Schedules and Email Recipients of the reports.

The range of reports generated can filtered by alphabetical range.

APRIL 2016 – VERSION 14.2.5.10

Merge Users

Design Changes

TRACE MEMOS FOR MERGE ACTIONS

Trace Memos will now be added to Service Requests to indicate when the Requester has been merged into another user.

- E.g. "User A" is the Requester of a Request

- "User B" is a separate user

- "User A" is merged into "User B", leaving only User B

- All of User A's requests now belong to User B

- Trace Memos will be added to all of User A's requests, indicating a merge action was performed on the user.

- Please note that User B (the base user's) requests are unaffected – these traces will only be applicable to the original requester who was merged into another User A's requests.

Views

Design Changes

TIME SCHEDULED COLUMNS

In any **Views** where "**Time Schedule**" columns are present, and a selected request does not have a schedule set (e.g. set to "Waiting for Response" or "Suspended"), the request will be listed as "Not Scheduled".

IN QUEUE VIEW

In the 'In Queue' Service Requests view, drag and drop functionality has been facilitated for moving the requests between folders.

SERVICE REQUESTS VIEWS (WORKSPACE)

Single-request operations (such as "Rating", "Schedule" or "Close") are now disabled when users select multiple requests in the Workspace Grid.

- I.e. A user can hold shift to select multiple requests; right-clicking on multiple requests will not allow for any single-request operations

Discovery

Design Changes

DISCOVERED ITEM QUERIES

Enhancements have been made to Discovered Item Queries, to accommodate changes made to the existing Discovery Service:

1. **Changes in the Summary Information node**

   - New fields have been added to Discovered Item Queries, along with their selectable Criteria:

     - **Discovered Item Type –** Computer, Printer, Router, Firewall, Firewall-Gateway, UPS, Monitor

     - **OS Architecture –** Bit32, Bit64

     - **OS Type –** None, Windows, MacOS, Linux

   - Computer Name has been changed to Discovered Item Name.

2. **Changes in the Installed Software node**

   - Discovered Items have been added to the Installed Software node:

     - **Application Architecture** – Bit32, Bit64

3. **Changes in the Disk Drive node**

   - **Disk Drive** has been renamed **Disk Drives/Printer Supplies** in order to accommodate Printer-related items:

     - **Drive Type** has been renamed **"Drive Type or Toner Name"**

     - **Free Space** has been renamed **"Free Space or Toner Level"**

DISCOVERED HARDWARE – ASSET CREATION

Asset Creation in Discovered Hardware has been updated in the following ways:

- When a user selects multiple hardware items of the same type, and right-clicks to open the context menu, the Create New Asset option will appear for the user.

- Conversely, if a user selects multiple hardware items of different types (i.e. Computers, Routers, Printers), and attempts to create assets using the right-click context menu, the "Create New Asset" option will not appear for the user.

- The full list of affected hardware types are listed:

  o Computer

  o Printer

  o Scanner

  o Switch

  o Router

  o Firewall

  o Gateway

  o UPS

  o Monitor

- When Assets are created by dragging from the Discovered Hardware window, or using the right-click context menu, assets will be created in the Asset Tree. When users "clear associations" with the asset tree, the item will be added to the Discovered Hardware section, and removed from the Asset Tree.

- Assets will default to the "Hardware" custom Type if the asset is created from Discovered Hardware types other than workstations. Users will be able to change the asset type based on preferences, but the asset will still maintain its association with the Discovered Hardware.

- When updating assets created from Discovered Hardware types that are not workstations, the application will not clear the association with the Discovered Hardware when changing the Asset type.

- Users can clear Discovered Hardware associations of assets by selecting the "Clear Association" option from the Discovered Hardware user interface.

- Asset Custom Field types cannot be deleted from the object designer if it is associated with any discovered hardware. Users will be notified if any associations are present when attempting to delete these Custom Types from the Custom Object Designer.

DISCOVERY SERVICE IMPROVEMENTS

- The Discovery Service will continue to run if an incorrect schedule was entered (i.e. a schedule with an invalid start and end time, such as a start time later than the end time).

    - The Service will skip over the invalid schedule, and log the issue in the log file (ServicePRO.Discovery.Service.txt), and the schedule will no longer force the service to restart. It will move onto the next schedule in the list.

    - Users will no longer be required to restart the Discovery Service in response to running an incorrect schedule.

- Whenever a new Discovery Schedule is configured from the Service, it is no longer necessary to restart the Discovery Service in order for the new schedule to be picked up.

CONFIGURE DISCOVERY SCHEDULE – AUDIT BY DOMAIN TREE

Updates have been made to Auditing functionality in the Domain Tree:

- When the user selects a domain as the type of the audit, the checkbox "Allow to scan SNMP devices" will become visible and checked.

- When the user selects a Domain (DC) in the domain tree, the checkbox will remain checked.

- When the user selects an Organization Unit or Company in the domain tree, the check box will be unchecked; users can choose to check it again if needed.

    - If the checkbox is checked, SNMP devices in the entire domain will be discovered/scanned as well.

    - If the checkbox is unchecked, the SNMP devices in the domain will not be discovered/scanned.

DISCOVERED ITEMS – EXPORTING ITEM QUERY RESULTS AS LINEAR CSVS

Users can now export Linear CSVs of Item Query Results in Discovered Items from the ribbon toolbar, in addition to the original Grouped CSV format. Selecting the "Export to CSV" option will now open a dropdown with the following options:

- **Grouped** – Exported CSVs display Asset Query Properties in a grouped format; this displays Discovered Item Queries in a table that emulates the layout used in ServicePRO. Previously, all CSVs would export in this format.

- **Linear** – Linear CSV export will arrange all device property columns horizontally, in a single table format. See below for an example of a Linear CSV:

|	A	B	C	D	E	F	G	H	I	J	K	L
1	Time Clos	Ref#	Title	Status	Wait State	Email Acc	Team	Time Clos	Ref#	Title	Status	Wait State
2	11/16/201	695241	SP Error: F	Closed	ASAP		[NONE]	11/16/201	695241	SP Error: F	Closed	ASAP
3												

Surveys

Design Changes

SURVEY CUSTOMIZATION

Approval / Survey Ratings for both timeliness and quality can be customized from System Options.

Administrators will be able to customize the labels for timeliness and quality ratings, as well as the labels for ratings themselves.
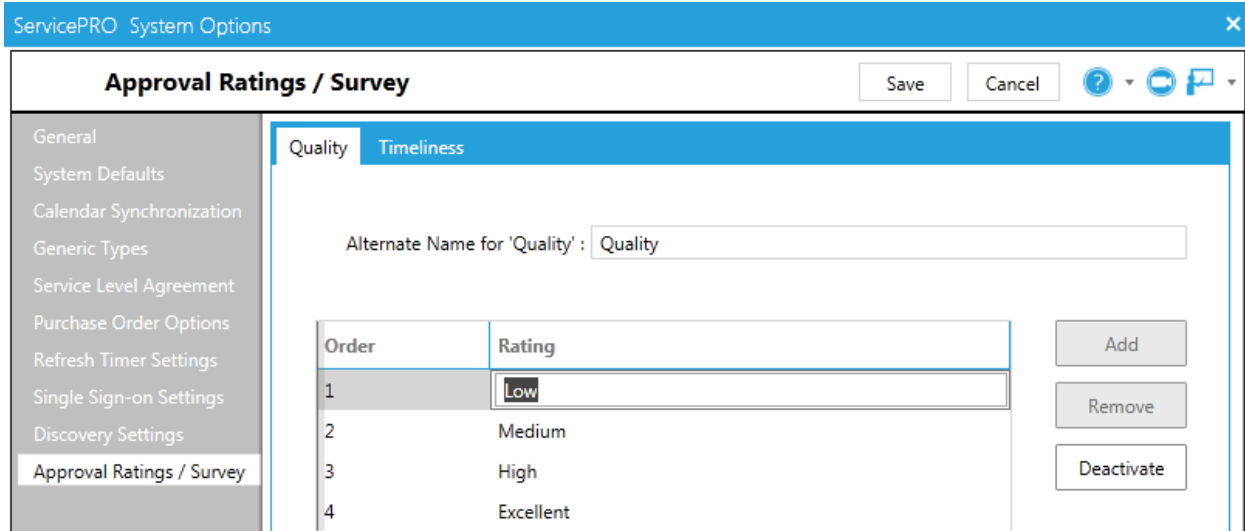
System Options Menu

System Options now features customization functionality for Approval Ratings and Surveys. Tabs for customizing "Timeliness" and "Quality" will be available.

- Both tabs will load the default timeliness and quality ratings available in the system.

- Users will be allowed to perform the following actions under both 'Timeliness' and 'Quality' tabs:

    - **Alternate names** for Timeliness / Quality

    - **Edit Rating Text** (Text Fields) for existing ratings

    - **Add** new ratings to the bottom of the list (highest ranking order)

    - **Remove** ratings from the listing

        - If **no** Service Requests currently use the selected rating, "Remove" will be allowed, and will delete the rating without issue.

        - If the rating is currently in use in any Service Requests, users will be prevented from removing the rating.

    - **Deactivate** – Allows users to disable the Rating, setting it as "Inactive". Inactive ratings differ from "Removed" ratings, as requests given this rating will continue to show the correct rating in Reports and Properties view.

- **Reactivate** – Only available for "Inactive" Rating labels. Users will not be able to edit Inactive Rating labels, or select them for use in Request Surveys.

- Users can add up to a maximum of 10 Quality Ratings (including inactive ratings)

- Users can add up to a maximum of 10 Timeliness Ratings (including inactive ratings)

Example screenshots:

Quality, with Ratings Edited from the Default

Timeliness, with Default Rating Settings
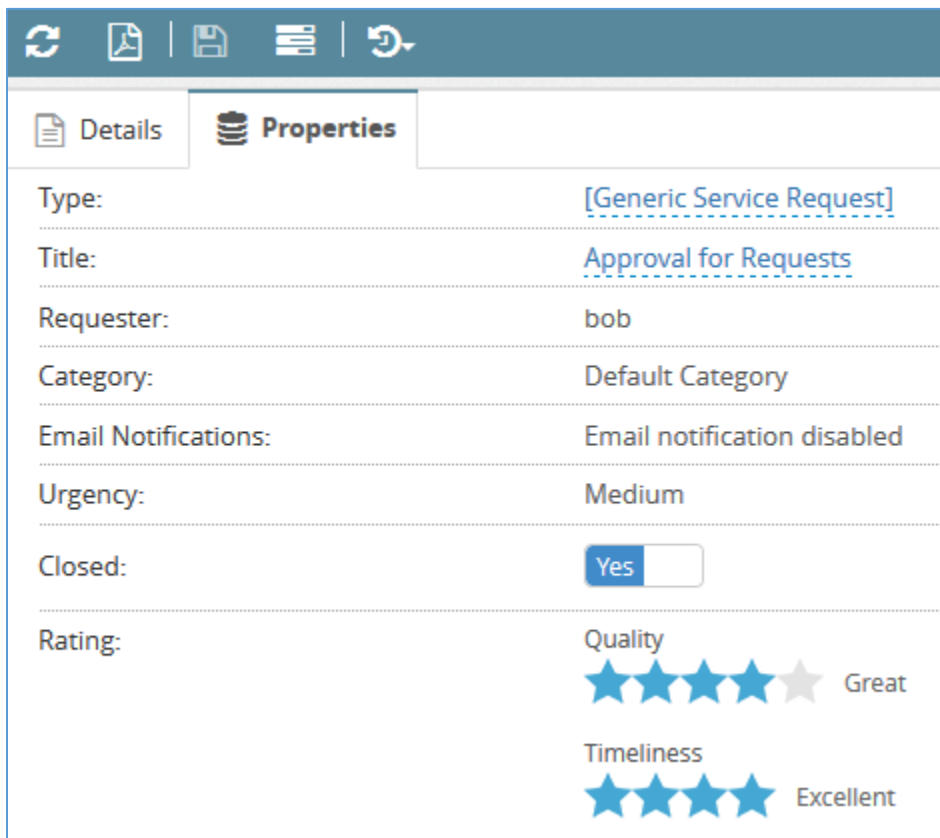

Quality and Timeliness Ratings in Closed ServicePRO Requests
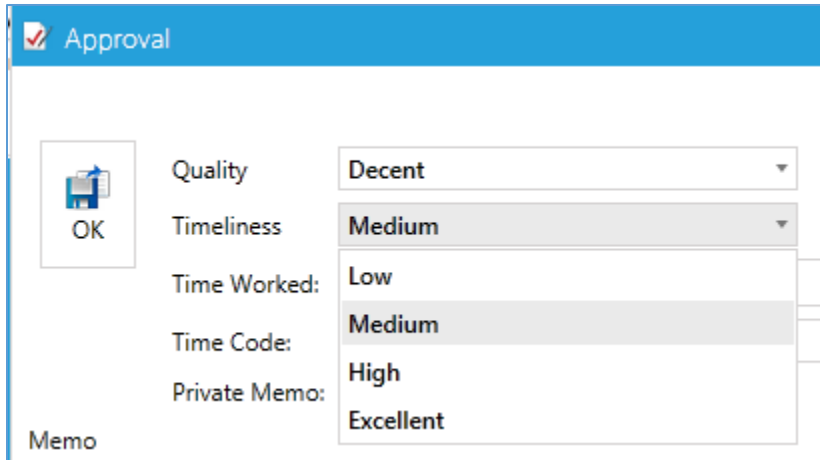
Any customizations made to the 'Quality' or 'Timeliness' labels and Rating names will be reflected in the Approval Rating window.

Quality and Timeliness Ratings in Closed Cloud9 Requests

Any customization to 'Quality' / 'Timeliness' labels and the customized rating options will be reflected in the Rating section in Cloud9.

Functions Affected by Customizable Labels

- Customized ratings will take effect in the following options and views, as they are associated with Survey Customization:

- Request Approval from both ServicePRO, Cloud9 and Legacy End User Portal – users performing ratings will see customized labels for Timeliness and Quality. In addition, Customized Ratings will appear in the dropdown menu.

- Request Properties Preview in both ServicePRO & Cloud9

- Query Designer

- User Satisfaction Reports

- When the user rates a request and saves it, a trace will be created that uses these labels and values.

Data Analysis

New Features

SERVICE STATISTICS – TRACKING TIME AT CURRENT PRIORITY

A new Service Statistics field is made available in Queries and Reporting, based on the current amount of time the request has stayed at its **current** priority.

- Current Time in Current Priority:

    - Tracks time the request has stayed in the Current Priority in business seconds, starting from the last time priority was switched

    - This timer is paused whenever the request switches from 'ASAP' to 'Suspended', 'Scheduled', or 'WFR' wait states. The timer resumes when the request is switched back to ASAP.

- These metrics work similarly to service statistics such as *TimeInQueue* and *TimeInService*.

- The new Service Statistics fields are available for use in the following:

    - Query Designer

    - Rule Designer, Filters Tab

    - Chart Designer

    - Custom Report Designer

Data Analysis – Reporting

New Features

CUSTOM REPORTS – BLANK REPORT DESIGNER

Users can now create and edit Custom Reports from scratch using a blank report template. These blank templates use a SQL Connection to the ServicePRO Database as a data source, allowing for free and flexible report creation from within ServicePRO.

Users can initiate Blank Template report creation under Custom Reports; the existing "New" option in the ribbon toolbar now offers two options for Custom Report creation:

1. **Blank Report** – Creation of new Custom Report functionality from scratch, with no templates; newly implemented

2. **Using Template** – Creation of Custom Reports using base templates; previously the only report creation option in Custom Reports

When creating Custom Reports from a blank template in the Custom Report Designer, the following tabs will not be loaded:
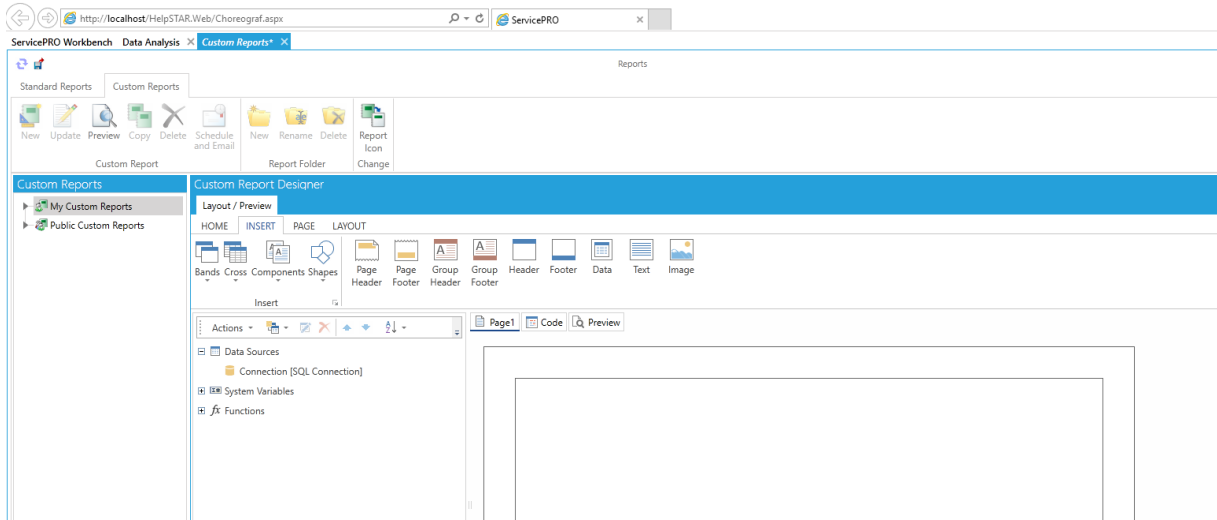
- Base Report
- Filters
- Custom Fields
- Grouping
- Header and Footer

Layout/Preview Tab

In the Layout/Preview tab, the Stimulsoft Silverlight Report Designer component will be loaded with the Report Dictionary prepopulated with SQL connection to ServicePRO Database as Data Source in order to make it readily available for the user to use.

SQL Connection Strings will be formed based on Authentication configured for ServicePRO; this can be retrieved from DataConfiguration.Config (SQL or NT).

The user will not be allowed to edit the pre-populated Data Connection, or create a new one. The option to create a New Connection will be disabled.

Blank Report Creation

Under the Layout/Preview tab, the Stimulsoft Silverlight Report Designer component will be loaded with the Report Dictionary, prepopulated with SQL connection to ServicePRO Database as Data Source.

Screenshots below outline the steps involved in creating a Blank Report:

1. The user will need to write a SQL query for creating the Report Data Source.
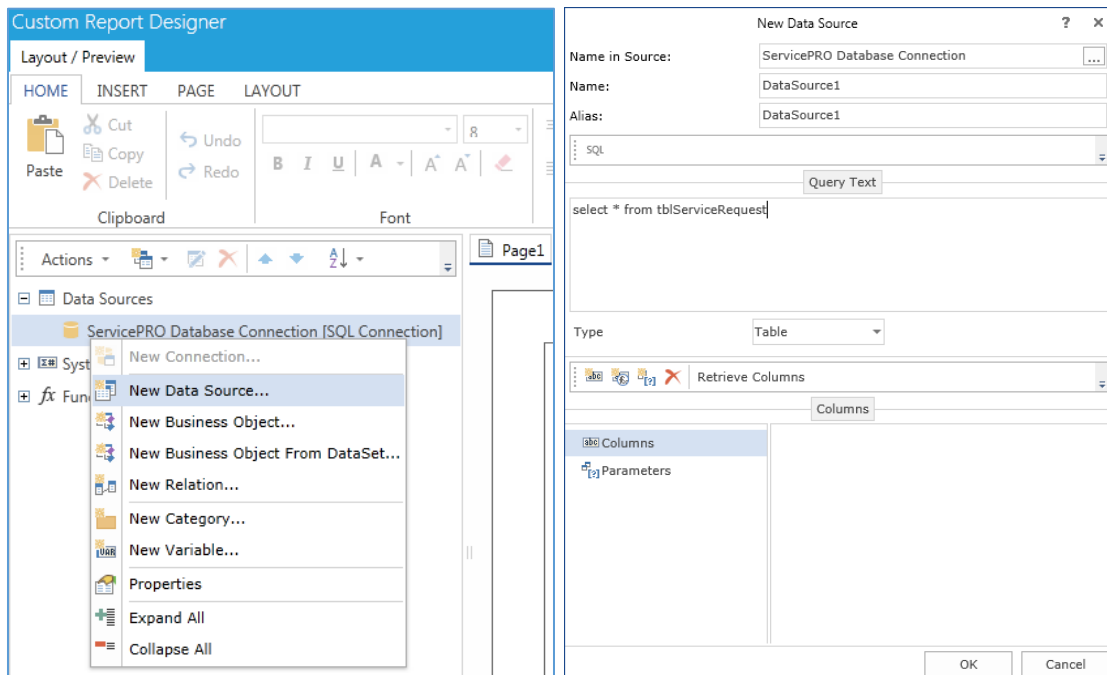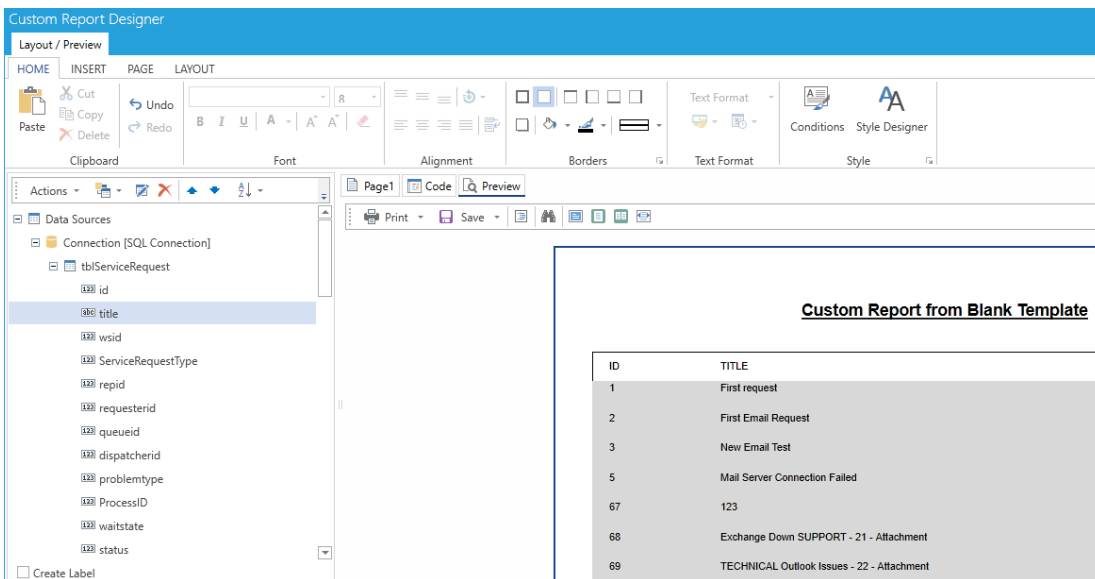

2. The Report Dictionary will be populated with fields from the executed SQL query.
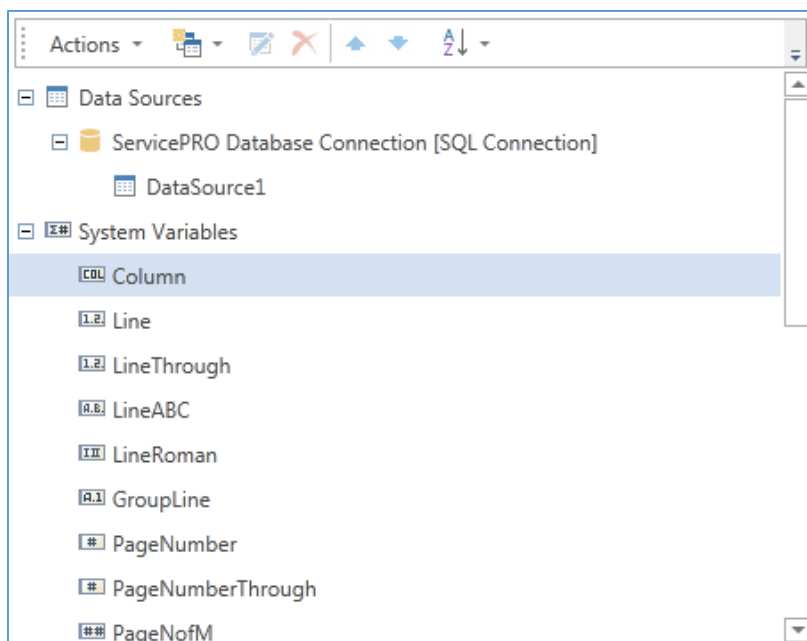
3. The user can begin designing the report; they will be able to choose fields from the report dictionary for placing in the report designer.
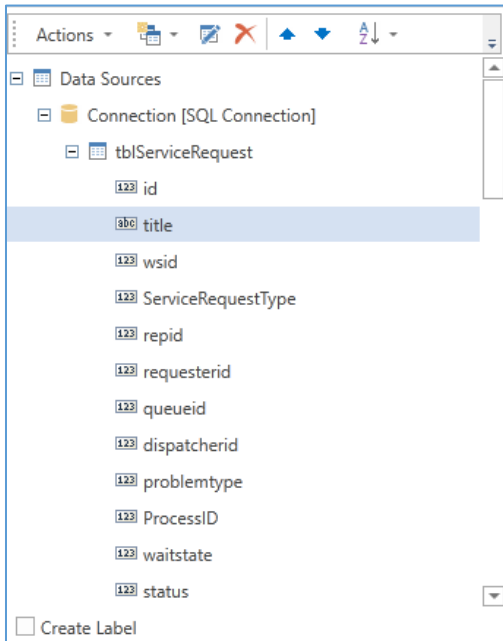
4. The user can preview the report to verify if the SQL query validates correctly, and ensure the designed report works as intended.

5. Save the report.

As users will be writing their own SQL queries to retrieve data, there is no way to restrict access to requests using RBAC as is normally the case for the templated reports.

A user that is running/creating the report can view all requests regardless of whether they have permission on the queue folder the request resides in.

Therefore, users creating reports should be careful which requests are displayed in the reports and who has access to view these reports.

Report Records Limit

System Options settings for the maximum allowed report records will be created and used in the same manner as reports created from a base template. When a report is rendered:

1. The record count of each Data Source in the dictionary will be retrieved from the database, regardless of whether the data source is used in the report design or not. This count will contribute to the total record count for the report.

2. The total record count is then compared with the number set in System Options to check if it exceeds that number.

3. If this value is exceeded, a message will be displayed to the user. The same method will be used to check if the report has no records.

Previewing Custom Reports Created from a Blank Template

Previewing a Custom Report created from a blank template is functionally similar to previewing reports created from a base report. Users should select the report from the custom reports tree, then select the "Preview" button in the ribbon toolbar. The report will be generated and the preview will be rendered in a new tab using the Stimulsoft Report viewer.
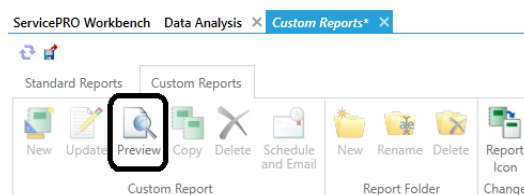
Change Report Icon

The 'Change Report Icon' ribbon menu option will be disabled for Custom Reports created from Blank Templates, as these reports have no default icon attributed to them for editing.
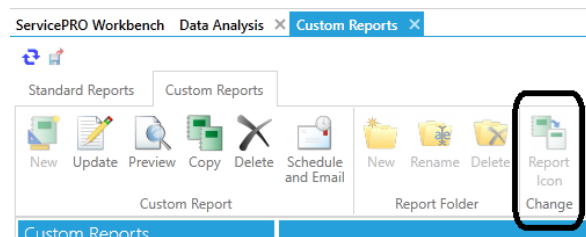
Limitation

Stimulsoft Charts will continue to work as intended with the custom reports created using ServicePRO pre-defined Report templates. However, the Charts component is currently unsupported for reports created using Blank templates.

DOUBLE-CLICK TO GENERATE/PREVIEW REPORTS FROM LISTING

Users can now generate or preview a report from the Custom Report Listing by double-clicking it.

LINE ITEM SUMMARY CUSTOM REPORT – ADDITIONAL TIME STATISTICS FIELDS AVAILABLE FOR SELECTION

New Time-related data fields have been added to Line Item Summary Custom Reports. These fields can be selected from the Report Dictionary in the Custom Report Designer.

Newly added fields are listed below:

Cumulative Service Statistics

- Time in Dispatch
- Time in Queue
- Time in Service
- Time Active
- Time Active
- Time in Suspense
- Time Waiting for Response
- Time Open

Response Time Statistics

- Time Logged to First Memo
- Time Logged to Dispatch
- Time Logged to Support Rep
- Time Logged to Queue
- Dispatch to First Memo
- Dispatch to Support Rep
- Dispatch to Queue
- Queue to First Memo
- Queue to Support Rep
- Support Rep to First Memo

USER SATISFACTION CUSTOM REPORT – REQUEST TITLE AND REFERENCE NUMBER FIELDS

Two new fields are available in Custom User Satisfaction Reports:

- Request Title
- Reference Numbers

Active Directory Sync

New Features

CONFIGURATION – ACTIVE DIRECTORY SYNC FUNCTION FOR PUBLIC CLOUD CLIENTS

AD Configuration functionality is now available for ServicePRO Public Cloud clients. For Public Cloud Clients:

- Users will only be able to select "ServicePRO Only" for ServicePRO and ServicePRO Cloud9 Authentication.

  - "ServicePRO and AD" and "AD Only" settings will not be selectable.

- **Import Settings Tab** – Selecting 'Add' opens the "Active Directory Organizational Units/Containers/Groups to Import" view. Here, Users will be allowed to add active directory groups or units to Import, but the only option available will be to 'Enter Active Directory Path manually'.

  - To add items to import, Administrators will need to manually enter in the "AD OU/Container/Group path" field

- **Field Mapping Tab** – "Add" operations are not available from this UI; new field mappings will need to be set up directly from the database by running SQL Scripts

- **Schedule/Import Now Tab** – "Import Now" options will be disabled because the ServicePRO Application hosted in Public Cloud cannot access Active Directories for performing user synchronization.

ACTIVE DIRECTORY ACCOUNTS – LOGIN SETTINGS

Two new checkbox options are available in **Setup/Administration > Configure Active Directory Synchronization**, in the Import Settings tab, under the "Authentication" section:

1. Prevent AD user from logging in if the user is not present in ServicePRO

2. Use AD Import Settings in the below grid to control the AD users logging into the application

Option 1 will prevent AD Users from logging in if the user is not present in ServicePRO's database, and will prevent users from being created automatically at login. This option will be disabled by default, and must be manually enabled by the system administrator if they opt for this behavior.

Option 2 will use AD Import Settings set up in the Active Directory Groups/Units grid, at the bottom of the Import Settings tab to control the AD users logging into the application.

- If the user already exists in ServicePRO, then authentication will occur.

- If the user does not exist in ServicePRO, and if the user is successfully authenticated by AD, the following will occur:

  - If the user does not belong to any of the Domains, Organizational Units or Groups selected in the AD Import configuration settings, then the user will not be created in ServicePRO; this user will not be allowed to login to the application.

  - If the user belongs to any of the Domains, Organizational Units or Groups selected in the AD Import configuration settings, then the user will be created in ServicePRO and hence the user will be allowed to login to the application.

If Option 1 is enabled by the Administrator, Option 2 will be disabled. This is because Option 2 is ignored during AD Login processing.

Passwords

Design Changes

PASSWORD RESET

The A/D and Windows Password Reset feature has been updated to support the following operating systems:

- Windows 7

- Windows 8

- Windows 8.1

- Windows 10

PASSWORD RESET PORTAL – USER INTERFACE

The Password Reset Portal's user interface has been updated visually.

Manage Users

Design Changes

PASSWORD FIELDS

When Managing Users and editing login information for the user, Password fields will now display dummy masked characters as a placeholder for passwords.

OneLogin Integration

Design Changes

INCREASED IMPORT USERS LIMIT TO OVER 1000 USERS

OneLogin's API for retrieving users has been updated to fetch over 1000 users. OneLogin User Import functionality will import all the users from the OneLogin to ServicePRO.

License Agreement

Update

UPDATED AGREEMENT

The License agreement for ServicePRO has been updated to reflect recent changes to company information.

Service Request – Update

Design Changes

ASSET SELECTION IN SERVICE REQUESTS

Enhancements have been made to the Asset Selection field in Service Requests, under the General Information section:

- Users can search for valid assets by typing into the field, and press Enter or click on the Search button. The asset selection window will open with the search phrase already entered into the field, and a search will automatically be performed in this view with the entered information.

    - If a selection is made, the Asset will appear in the Asset field as a selectable link.

    - If no selection is made or cancelled, the search window is closed, and entered text will be cleared.

ServicePRO Webtop Client

Design Changes

SERVICEPRO WEBTOP – AD AUTHENTICATION

ServicePRO Webtop will now handle AD Pass-through authentication automatically; clients will no longer need to open ServicePRO in Internet Explorer first.

Business Rules

New Features

NEW BUSINESS RULE CRITERIA

- Added a Query Designer / Rule Criteria to include requests, only if every memo in the request satisfies the stated criteria.

- The criteria can be used in either of the following ways:

    - If a specific phrase is NOT present in all memos of a request, that request will be included in the listing

    - If a specific phrase IS contained in all memos of a request, that request will be included

- Criteria conditions:

    - 'Every Memo' - Do not contain – phrase

    - 'Every Memo' - Contain – phrase

- When this criteria is selected from its node in the Business Rule criteria side bar, the user will not be allowed to select any fields under "All Memo" node for showing the field or for criteria. This is to avoid any conflicts associated with having both criteria running at the same time.

Knowledge Base

Design Changes

IMPROVED KNOWLEDGE BASE EDITOR – WINDOW SIZE AND VISIBILITY

The Knowledge Base editor window now occupies the full screen in all areas, instead of a smaller dialog box in the center of the screen.

ServicePRO – My Responsibility

Design Changes

MY RESPONSIBILITY FOLDER VISIBILITY UPDATED

In Workspace, the My Responsibility node will now only show requests that the User has been assigned responsibility to. The folder tree structure in the My Responsibility node has been removed to simplify user experience.

CURRENTLY UNSUPPORTED FEATURES

- HelpSTAR SharePoint End User Portal

- Guided Setup (originally found in File > Setup/Administration > Administration Tab)

- Quick Access Toolbar. Therefore the following options are no longer possible:

    o   Home Quick Access Option

    o   Ability to add ribbon menu options

    o   Restore Quick Access Toolbar

REVISION HISTORY

Version	Description of Revisions	Date
1	Initial Compilation and Completion	November 27, 2013
2	Updated wording for Excel/Print functionality Service Request section has been revised to feature more sub-topics, due to its length Added new change to Service Requests: Next and Previous buttons in Memo	January 27, 2014
3	Altered for External Use; Internal development-specific issues and comments have been removed Removed sections: • Elevated Trust • Excel Export Functionality and Printing • Functionalities that Require Elevated Trust • Import Utility • Installer • Language Region Settings • Login Page - Password Check in ServicePRO • Manage Organizational Units • Organizational Hierarchy (information in it moved to "Service Requests" section) • Out of Browser (no longer supported) Major new content: • Custom Fields (new SR) • Recent	March 24, 2014
4	Revised: • Data Analysis and Queries • Roles Based Access Control (RBAC)	April 4th, 2014
5	Updated changelog with new features, implemented in the following releases of ServicePRO: • July 2015 (14.1.1.16) • Nov 2015 (14.2.1.12) • Apr 2016 (14.2.5.10) Changelog features now listed by date of addition, starting with additions in July 2015. For more information, view "Feature Release Notes" section on ServicePRO's Technical Document wiki page: http://www.servicepro.wiki/wiki/28/technical-documents	June 4th, 2016