August 2017
Feature Requests
Documentation
14.2.10.3

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Feature Requests

The following client-requested features have been implemented as of ServicePRO 14.2.10.3 version.

1. ServicePRO

1.1.   Persisting user's custom spell check dictionary during an upgrade

Memo Editor in ServicePRO has been enhanced to facilitate the persistence of user's custom spell check dictionary during any future updates to ServicePRO.

After updating to this version, the user's custom spell check dictionary words will be stored in the database and hence updating to any future version of ServicePRO will retain the words stored in the custom spell check dictionary. **Exception Scenario:** Only when updating to 14.2.10.3 version from any lower version of ServicePRO, the current spellcheck dictionary maintained in the local storage will be cleared.

In ServicePRO, there are three Modes for Spell Check facilitated with memo editor:
1.   Disable Spell Check: This mode will not perform Spell Check.
2.   Enable as-you-type Spell Checking: This mode checks spelling as you start typing the words.
3.   Enable Spell check only when I save: This mode will not perform Spell Check as you type but on saving, it will prompt you with the correct words from the Dictionary.

Whenever the spell check fails due to the reason that the word doesn't exist either in the US dictionary or in the user's Custom Dictionary, if user wants to add that word to his/her custom dictionary, he/she has to click on 'Add to Dictionary' which will save that word in the Database for that user. All the words added into user's custom dictionary has been listed in Suggestions. Also, the user can click on Custom Dictionary to find all the added words and also, to add and edit words.

1.2.   Show Reference to Parent Purchase Request in Place Order view/ Items Requests

- Enhancements in Approved Purchase Request View/ Place Order View to facilitate the user to refer back to the Parent Purchase Request while reviewing the Purchase Items for placing the order.

  In the Approved Purchase Request View/ Place Order View, the Approved Items have been listed with grouping under the associated Parent Purchase Request as shown in the picture below (Figure 1.2.1). The group header will show the Parent Purchase Request # with hyperlink. When the Parent Purchase Request # hyperlink is clicked on, it will open the Request Details for the Parent Purchase Request.
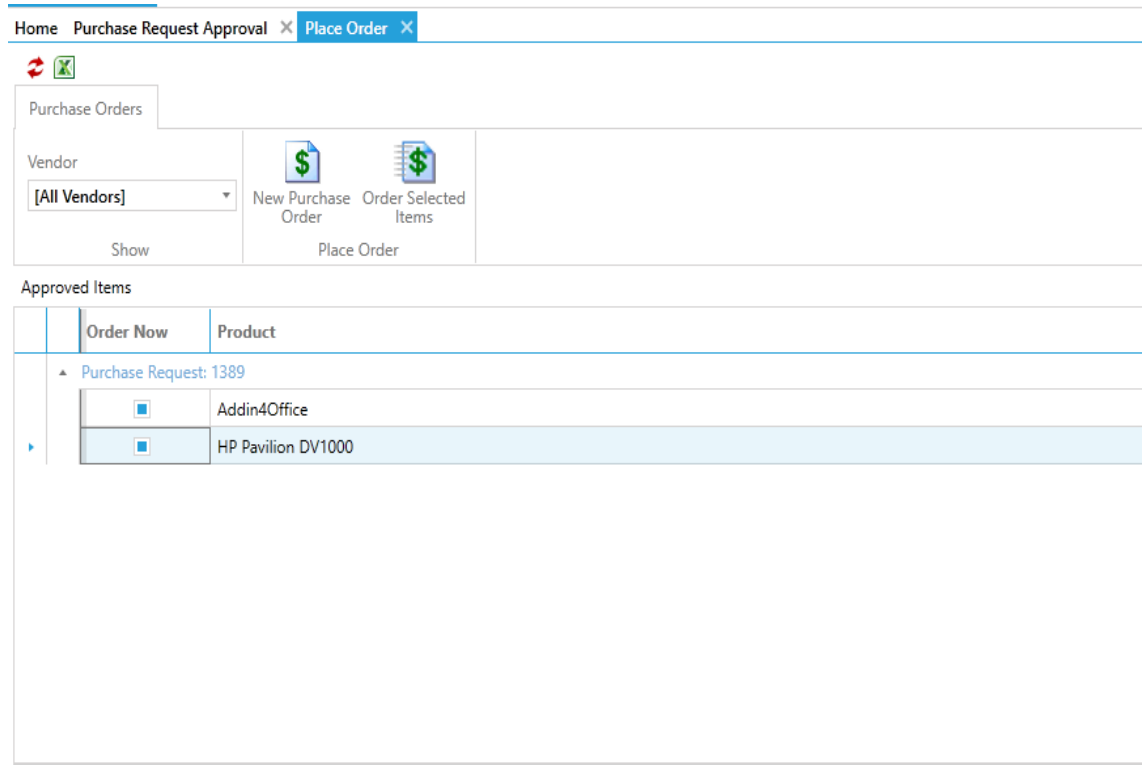
Figure 1.2.1

- Enhancements have been made in the Request Properties tab of Request Preview to show the Parent Purchase Request # if it is an Item request.

  When User clicks on the 'View Request Details' or 'Update Request' Context menu options in the Approved Items list, it opens the Item Request in Detailed View/Detailed Update View.

  In the request details view/detailed update view for the item request, in the Request Properties tab under Request Details, a new property called 'Parent Purchase Ref#' has been displayed with Parent Purchase Request #. This Property has a hyperlink and when the Parent Purchase Request # hyperlink is clicked on, it will open the Request Details for the Parent Purchase Request. This is depicted in the following two images (Figure 1.2.2 and Figure 1.2.3).
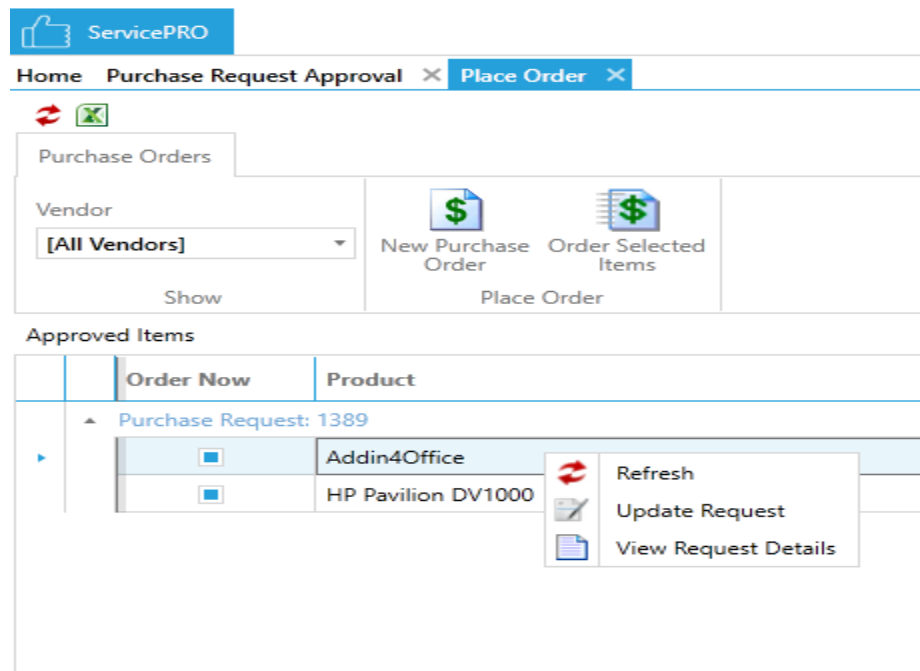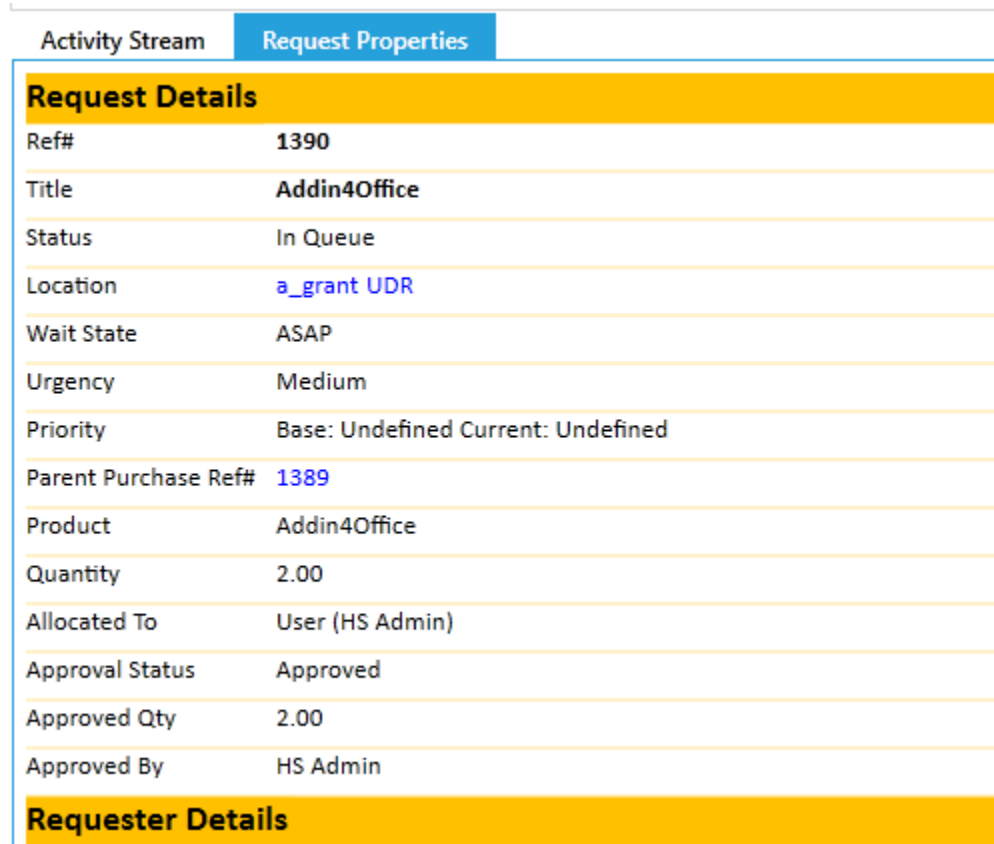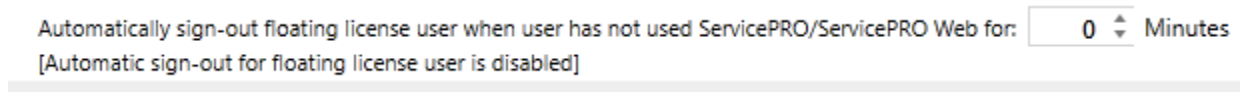
Figure 1.2.2

Figure 1.2.3

1.3.   Floating License Sessions - Idle User detection & timing out after the specified idle time [with giving a grace period]

Idle user detection for Floating License User sessions and auto signing out after the specified timeout have been implemented in both ServicePRO and ServicePRO Web. The user will be shown an alert after the specified Idle timeout and will be given a 5 minutes grace period before auo-sign out occurs.
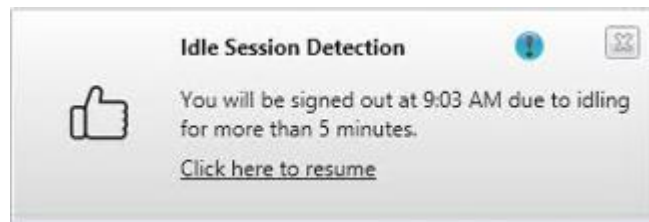
To enable this implementation, a new System Option as shown in the below image has been added. If this System option is set with value greater than or equal to 5, then the automatic sign-out for floating license user will enabled with the idle time out equal to the value specified.

Automatically sign-out floating license user when user has not used ServicePRO/ServicePRO Web for: ⬚ 0 ⬍ Minutes
[Automatic sign-out for floating license user is disabled]

In both ServicePRO and ServicePRO Web applications, the last user activity is recorded for all the licensed user sessions.

If the automatic sign-out for floating license user is enabled, then the Starwatch service monitors the last activity time recorded for the floating license user sessions and marks them for automatically kicking/signing out if the last activity time is past the idle time out.

Both ServicePRO and ServicePRO Web applications monitor for the sessions marked for kick out due to idling. If the current floating license user session has been marked for kick out, then the application shows an alert with the resume option to the user for 5 minutes.

Idle Session Detection ⓘ ⊠

You will be signed out at 9:03 AM due to idling for more than 5 minutes.

Click here to resume

- If the user either clicks on resume or starts to work on the application, then the kick out or sign-out will be cancelled.
- If the user doesn't resume working within 5 minutes, then the user will be signed out and brought to the login screen. Also, a message on the idling kick will be shown on the login screen.
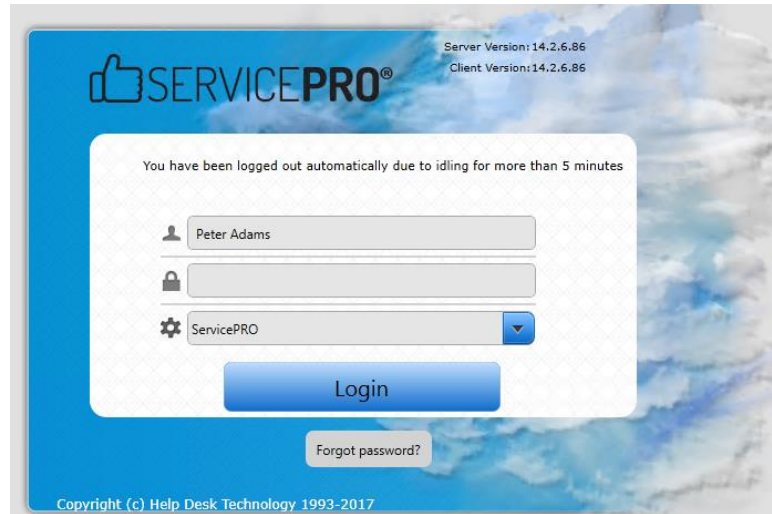
1.4. Chart Component in Custom Reports designed from blank template

A Chart Component can be added when designing Custom Reports using Blank Template and it is possible to generate charts in the application with the custom filtered and grouped data.
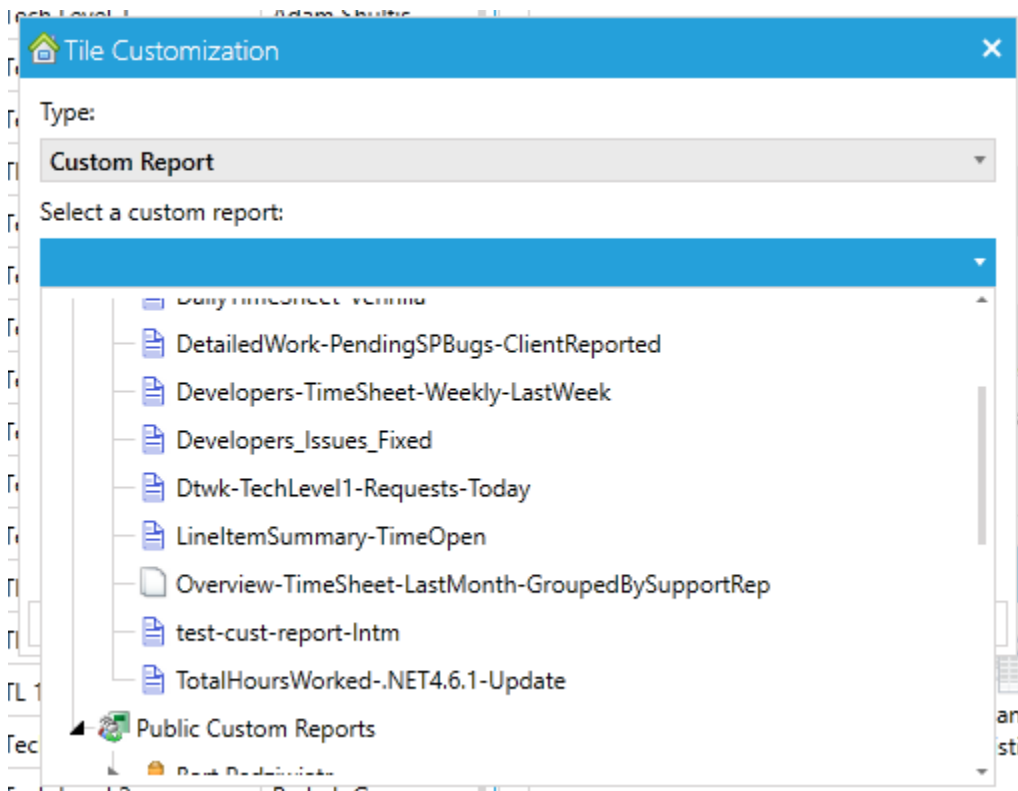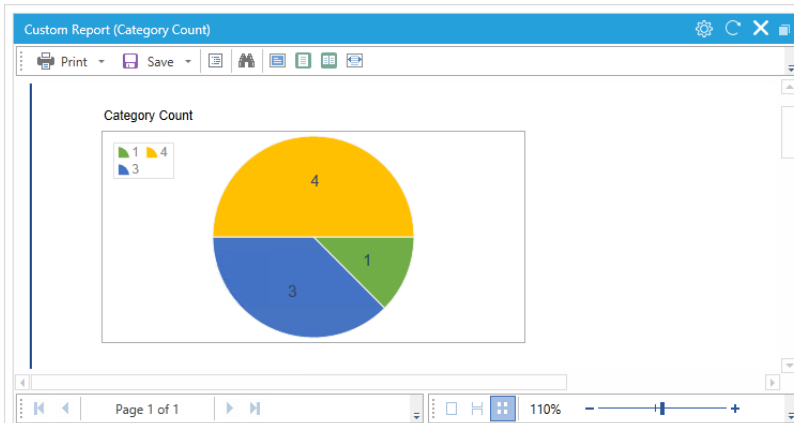
1.5. Chart Preview Home Page Interactive tile – Improvement in Chart Selection experience

In the interactive Home Page tile for Charts, searching by full or partial chart name is facilitated while performing the Charts Selection as shown in the below image.
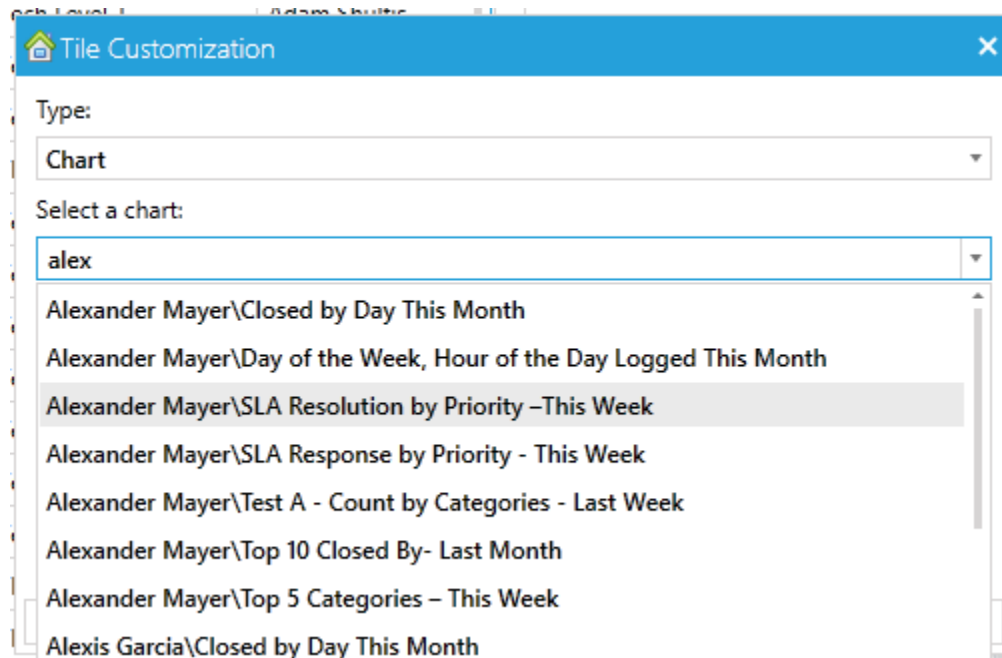
1.6. New Home Page Interactive tile – Custom Report Preview

A new home page interactive tile for Custom Reports preview is made available thus facilitating the preview of custom report charts in the home page tile.
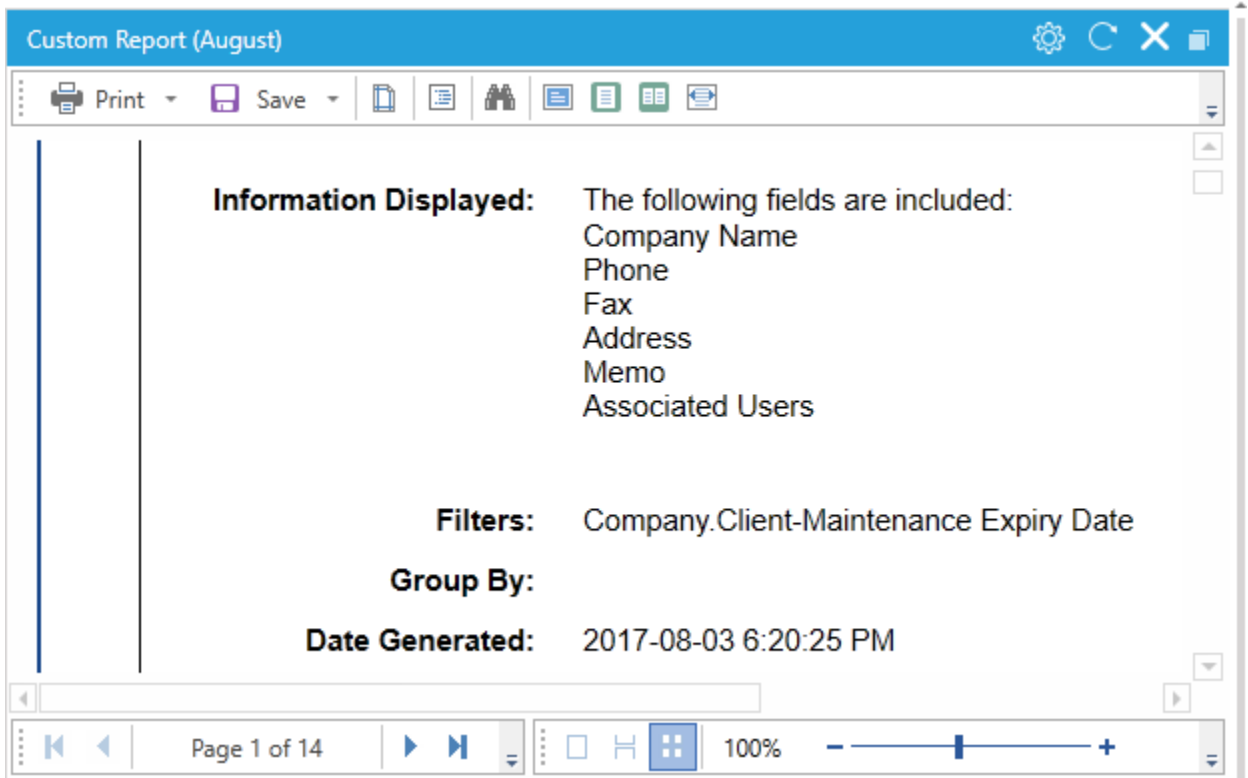
1.7.   Chart Preview Home Page Interactive tile – Legends Display

When viewing charts in the homepage interactive tile, if the widget width is more than the threshold (250 pixels), then the Legends has been displayed at the top as well as Data Labels has been displayed. So, the user no longer needs to hover over the data points to know the details.
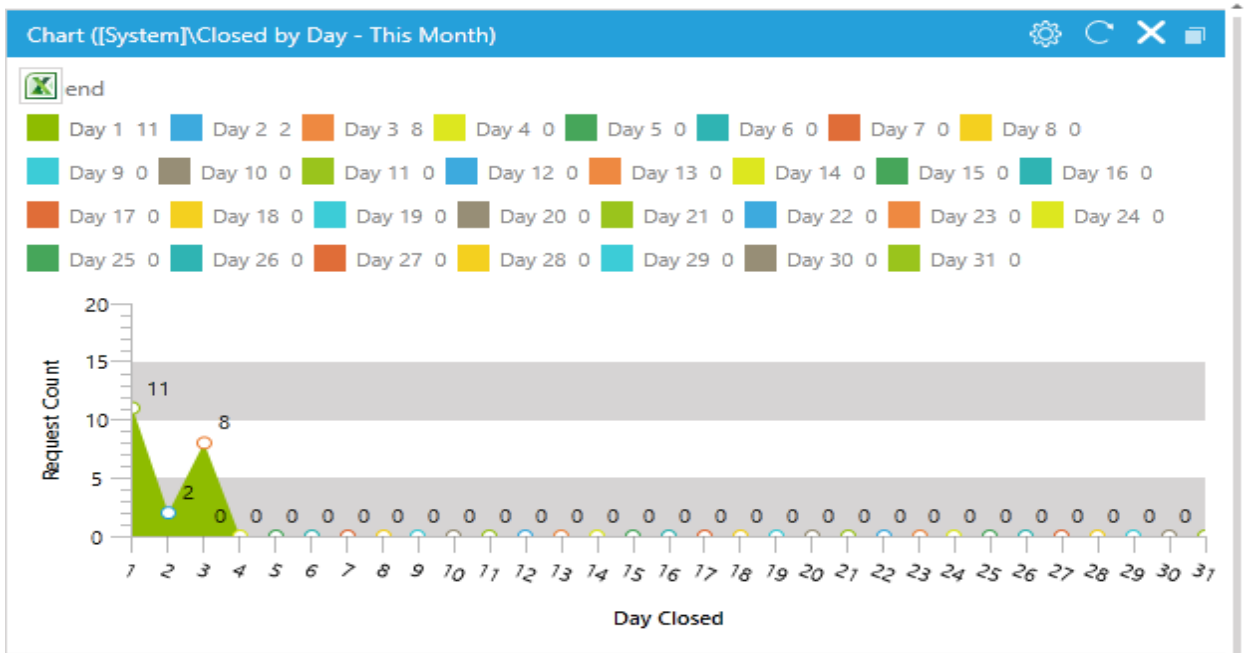
2. ServicePRO Web

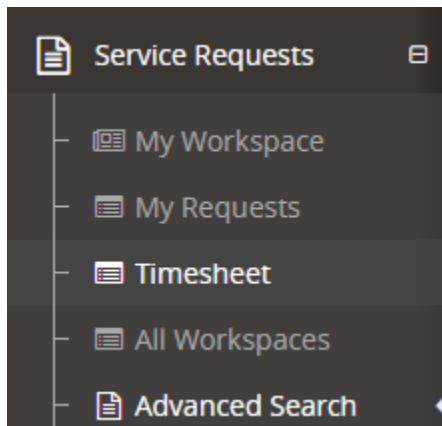## 2.1.   Request Advanced Search Feature

•   Option to perform advanced Search for Service Requests has been implemented and made available for Privileged users in ServicePRO Web.

When 'Advanced Search' is selected, the following view is loaded on the Right Hand Side facilitating search on the options shown in the screen shot.
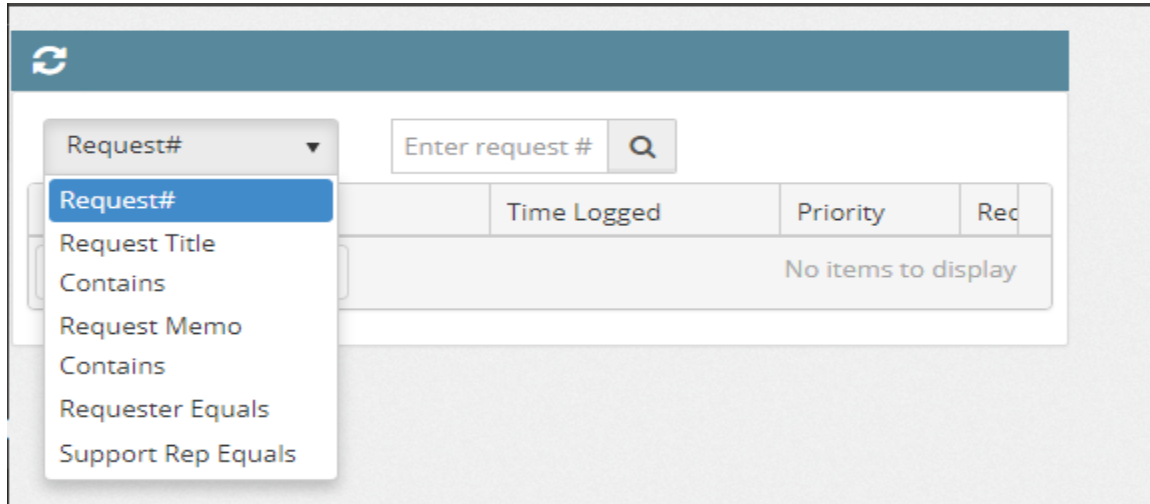
When searched on specific parameter, the requests that match the criteria are shown in the list view at the bottom with showing preview for the selected request on the right hand side.
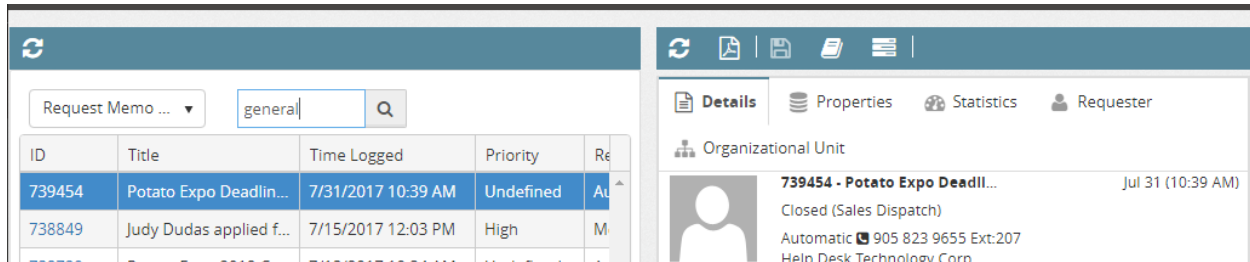
2.2. Direct Authentication by passing user credentials in the ServicePRO Web URI

Implementation has been made to pass the User credentials in the URI inorder to allow direct Authentication to ServicePRO Web

2.3. New Request Submission – Single Form/Page Mode
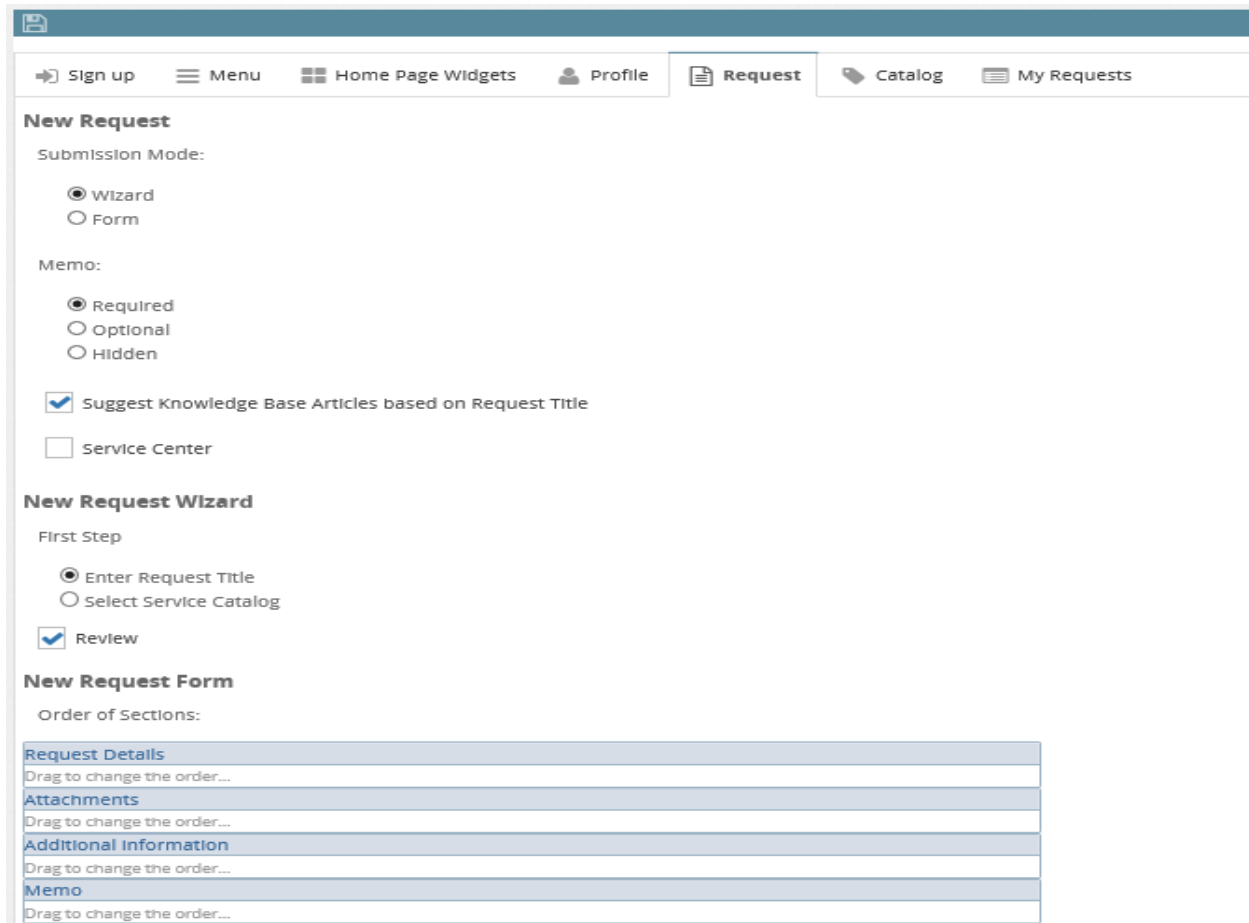
A new single form mode for logging requests has been implemented in ServicePRO Web with customizable options for the sections and the fields.

From the Portal Designer, ServicePRO administrator can set the preferred mode [form or wizard mode] for logging requests. However, the user can switch between the modes while logging the request.

As in the wizard mode, only for privileged users, the 'Project Tree' is loaded while submitting project requests in the Form Submission Mode.

2.3.1. Changes to - Portal Designer – End User Options

In the Portal Designer – End User Options, under 'Request' tab, the following new sections / options have been added and also, the existing options have been rearranged to make a meaningful presentation and flow.

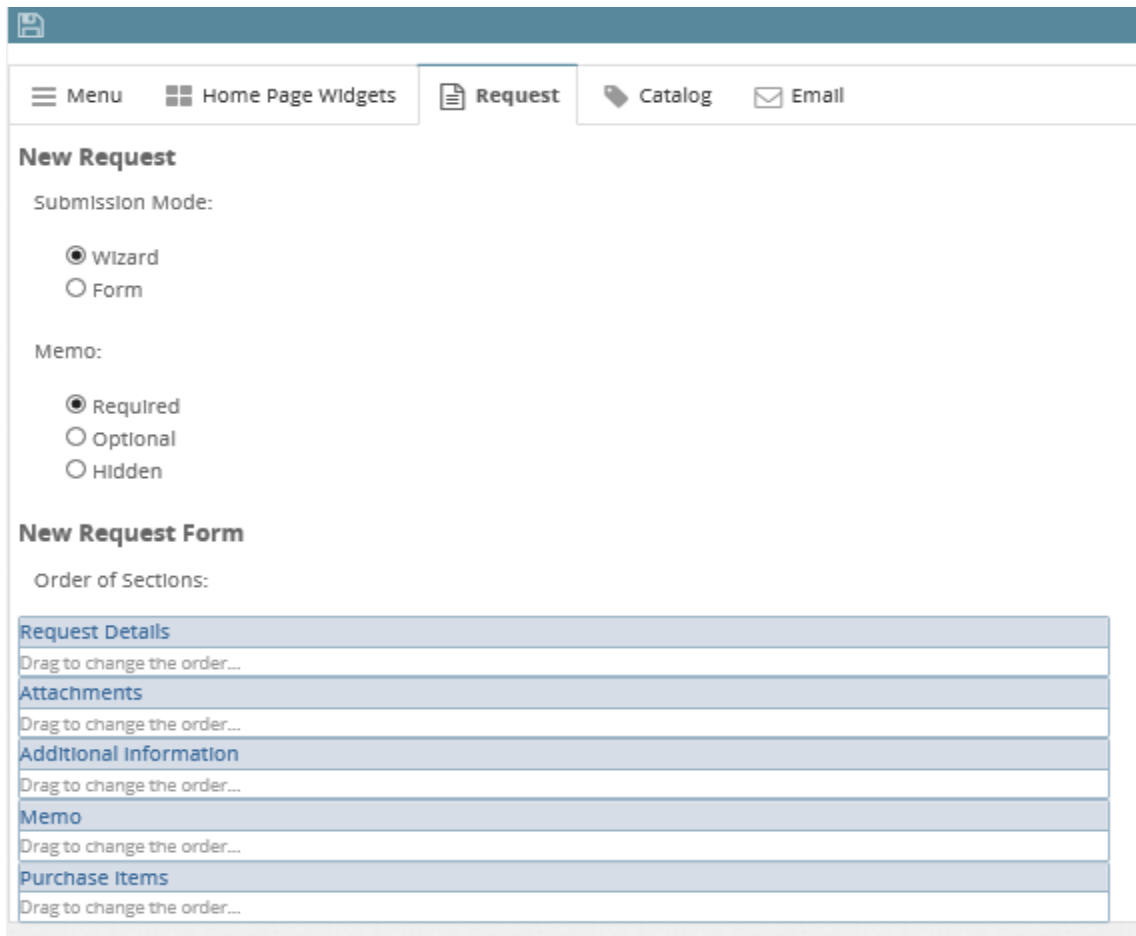1) A new section called 'New Request' has been added.
   - This section has Submission Mode selection –i.e. Option to choose 'Form' or 'Wizard' for New Request submission
   - This section has an Option to choose if Memo is Required/Optional/Hidden. And this option is applicable to both Form and Wizard.
   - The existing options 'Suggest Knowledge Base Articles based on Request Title' and 'Service Center' have been moved under this new section.

2) A new section 'New Request Form' has been added with Options to order the following sections of the New Request Form – And the order given below has been set as the default option.
   a. Request Details
   b. Attachments
   c. Custom Fields
   d. Memo
   e. Purchase Items [*this is only visible if 'Purchase Request' is enabled for End User under 'Catalog' tab in End User Options*].

2.3.2. Changes to - Portal Designer – Licensed User Options

In the Portal Designer – Licensed User Options, a new 'Request' tab has been added with the following new sections / options.

1) A new section called 'New Request' has been added.
   - This section has Submission Mode selection –i.e. Option to choose 'Form' or 'Wizard' for New Request submission
   - This section has Option to choose if Memo is Required/Optional/Hidden. And this option is applicable to both Form and Wizard.

2) A new section 'New Request Form' has been added with Options to order the following sections of the New Request Form – And the order given below has been set as the default option.
   a. Request Details
   b. Attachments
   c. Custom Fields
   d. Memo
   e. Purchase Items.

2.3.3. New Request Form – End User

1) When the end user clicks on 'New Request' option in the header, launching whether wizard or form is controlled by the user option and the system option – The application first checks the user option, if not set then uses the system option.

2) When the end user clicks on 'Submit' button in the Service Catalog, launching wizard or form is controlled by the user option and the system option – The application first checks the user option, if not set then uses then system option.
3) When in 'form' mode, a hyperlink to switch to 'Wizard' is shown. When clicked on this hyperlink, the New Request Wizard is loaded and the switched option is stored in the User options.
4) When in 'wizard' mode, a hyperlink to switch to 'Form' is shown. When clicked on this hyperlink, the New Request form is loaded and the switched option is stored in the User options.

In the 'New Request' form, the following sections have been loaded based on the order set in the End User Options:
1) Request Details
2) Attachments
3) Custom Fields – If a Custom Service type has been selected.
4) Memo – If Memo section is not marked as hidden in the End User Options
5) Purchase Items – If a Purchase request type (Generic or Custom) is selected.

The same controls as we use in New Request wizard have been used for rendering / displaying the fields for selecting data in New Request Form – This includes all the fields in the properties section, the Attachments Control, Memo control, the fields in the Custom fields section and the Purchase Items grid related controls.

ServicePRO

🖫	⟷ Switch to Wizard

Request Details

Title:	*Enter title*
Service Type:	Tech Support
Urgency:	*Select urgency*

Attachments

Select file(s)

Additional Information

Technical Specifications

Full Version of HelpSTAR:	Full Version of HelpSTAR
OR	
Full Version of ServicePRO:	Other Version
How to locate version number:	HS2012 and ServicePRO: Setup/Admin > Administration > License > About ServicePRO

2.3.3.1. Attachments, Memo, Purchase Grid Sections

The same controls and function as have with New Request Wizard have been implemented for Attachments, Memo and Purchase Grid Sections.

2.3.3.2. Request Details Section – Fields Availability

In the Request Details section, the fields that are made available for End User from the following sections in 'Portal Designer - End User Options' are shown:
1) Service Center option under 'Request' tab
2) 'Request Fields Available to End user' under 'Request' tab

2.3.3.3. Request Details Section – Service Type Field

In the 'Service Type' field in the Request Details section, the default selection is set based on the 'Default Service Type' set in the End User Options under 'Catalog' tab. And the list of types loaded in the Service Type drop down is controlled by the options set under 'Allowed Service Type Selection' in the End User Options 'Catalog' tab (in addition to Service Center / location and category selection based on their visibility).

The availability of purchase request in 'Service Type' selection is controlled by the 'Enable End User Purchase Request' option in the End User options 'Catalog' tab.

If a Quick Request template or a Project Request template is selected in the 'Service Type' field, the field values are pre-populated from the template parameters in the same way as in the New Request wizard. And when project request template is selected, only the parent task details are loaded for submission in the same way as in the New Request Wizard.

2.3.3.4.　Request Details Section – Suggesting knowledge base articles based on request title

If 'Suggest Knowledge Base Articles based on Request Title' option has been set in the End User Options – 'Request' tab, then when the user enters the title in the New Request Form, the suggested solutions are displayed based on the entered title.

2.3.3.5.　Custom Fields Section

The same controls and function that we have with New Request Wizard have been used to implement the Custom Fields Section.

2.3.3.6.　Saving the New Request

All validations as done in 'New Request Wizard' are handled while saving from 'New Request Form' as well. If Memo is marked as optional, then there is no validation error shown when the user has not entered a memo.

2.3.4.　New Request Form – Privileged User

1) When the privileged user clicks on 'New Request' option in the header, launching wizard or form is controlled by the user option and the system option. The application first checks the user option, if not set then uses the system option.
2) When the privileged user clicks on 'Submit' button in the Service Catalog, launching wizard or form is controlled by the user option and the system option. The application first checks the user option, if not set then uses the system option.
3) When in 'Form' mode, a hyperlink to switch to 'Wizard' mode is shown. When clicked on this hyperlink, New Request Wizard is loaded and the switched option is stored in the User option.
4) When in 'Wizard' mode, a hyperlink to switch to 'Form' mode is shown. When clicked on this hyperlink, New Request Form is loaded and the switched option is stored in the User option.

In the 'New Request' form, the following sections are loaded based on the order set in the Privileged User Options:
1) Request Details
2) Attachments
3) Custom Fields – If a Custom Service type has been selected.
4) Memo – If Memo section is not marked as hidden in the Privileged User Options
5) Purchase Items – If a Purchase request type (Generic or Custom) is selected.

The same controls as we use in New Request wizard have been used for rendering / displaying the fields for selecting data in New Request Form – This includes all the fields in the Request Details section, the Attachments Control, Memo control, the fields in the Custom fields section and the Purchase Items grid related controls.

💾 ⟷ Switch to Wizard

Request Details

Title:	**Printer Issue**
Service Center:	Tech Support
Folder:	Tech Support\\Tech Dispatch
Service Type:	Tech Support
Requester:	**QA test driver 2**
Assigned To:	Unassigned
Responsibility:	Unassigned
Email Notifications:	Email notification disabled
Category:	*Select category*
Begin Work:	ASAP
Due by:	ASAP
Urgency:	Medium
Priority:	
Closed:	No
Asset:	*Select asset*

Attachments

Select file(s)

Custom Fields

| Technical Specifications | Reference Details | Modifications |

Full Version of HelpSTAR: Full Version of HelpSTAR

OR

Full Version of ServicePRO: Other Version

How to locate version number: HS2012 and ServicePRO:
Setup/Admin > Administration >
License > About ServicePRO

HelpSTAR 2008 - 2010: Setup/Admin > License > About HelpSTAR

HelpSTAR 9.0: Help > About HelpSTAR

Operating System:

Operating System

Is your operating system 64 bit ?:   Is your operating system 64 bit ?

2.3.4.1. Attachments, Memo, Request Details, Purchase Grid Sections

The same controls and function as with New Request Wizard have been used implemented for Attachments, Memo and Purchase Grid Sections.

2.3.4.2. Request Details Section – Service Type Field

If a Quick Request template or a Project Request template is selected in the 'Service Type' field, the field values are pre-populated from the template parameters in the same way as in the New Request wizard. And when project request template is selected, the 'Project Tree' is loaded thus facilitating updating properties/details for all tasks in the project.

2.3.4.3. Custom Fields Section

The same controls and function as with New Request Wizard have been used to implement the Custom Fields Section.

2.3.4.4. Saving the New Request

All validations as done in 'New Request Wizard' are handled while saving from 'New Request Form' as well.
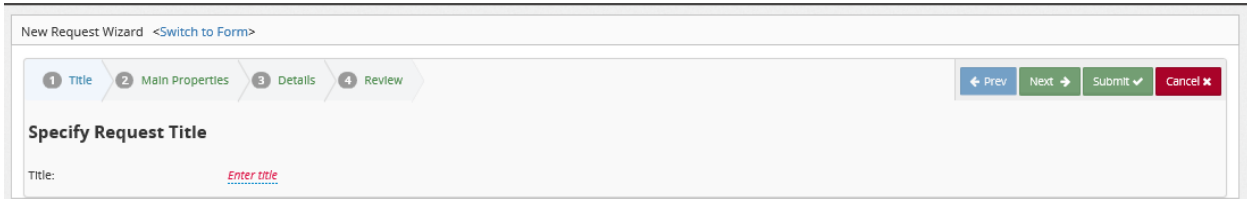
2.3.5. Changes to – New Request Wizard

2.3.5.1. Changes to 'Details' step

If Memo section is marked as hidden in the End User Options or Licensed User Options, 'Memo' field is not displayed in the 'Details' wizard step.

2.3.5.2.   Add a hyperlink to switch to 'Form'

When this hyperlink is clicked, New Request form is loaded and the switched option is stored in the User option.

### 2.3.5.3.   Saving the New Request

All validations as done in 'New Request Wizard' remain except for one change. If Memo is marked as optional, then there is no validation error when the user has not entered a memo.

2.4.   Request Listing Views - Pinning/Unpinning Folder Tree and/or Support Rep Tree
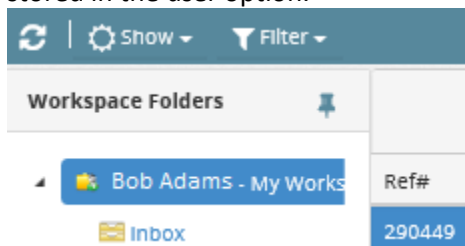
In the Workspace view and All Workspaces view in ServicePRO Web, options have been added to pin or unpin the folder tree. And in Timesheet view in ServicePRO web, option has been implemented to pin or unpin the support reps tree.

If the user has pinned the folder tree in one view, the other view would load it with pinned as well. And if the user has unpinned the folder tree in one view, the other view would load it with unpinned as well.
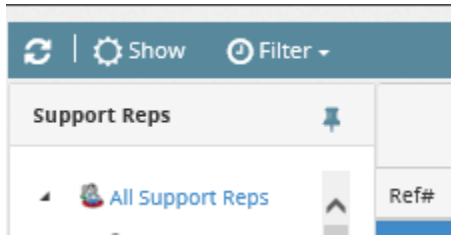
Workspace Folders Tree – When the folder tree is unpinned, option to 'pin' is shown.
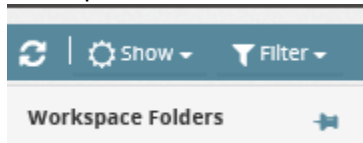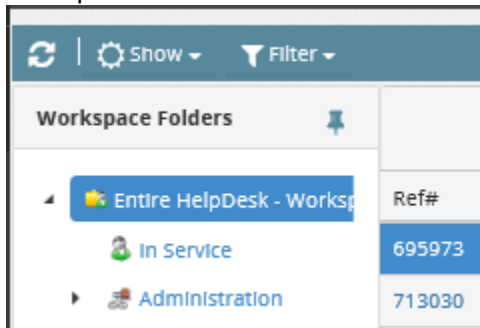

Workspace Folders Tree has been pinned now – Option to 'unpin' is shown. And the 'pin' option is stored in the user option.

While launching timesheet view, the Support Reps tree is now loaded as pinned, and Option to 'unpin' is shown.

While launching All Workspaces view, the Workspace Folders tree is now loaded as pinned, and Option to 'unpin' is shown.

3. Windows Password Reset

3.1. Facilitating the option of setting ServicePRO's Credential Provider as the default

•   In the Password reset component, enhancements have been made to make ServicePRO as default credential provider optionally which means user would see the "Reset password using ServicePRO" link

1.   If Password reset is configured using the command line as before, it will work as is now. [ServicePROPasswordResetter.exe /Install:<link>]

2.   If the Password reset is configured using the new command line parameter /DefaultCP, this will change default cp so that by default HSWCredentialProvider has been the default CP which means user will see "Reset password using ServicePRO" link [ServicePROPasswordResetter.exe /Install:<link> /DefaultCP]