



**July 2015**  
***Feature Requests***  
***Documentation***  
***14.1.1.16***

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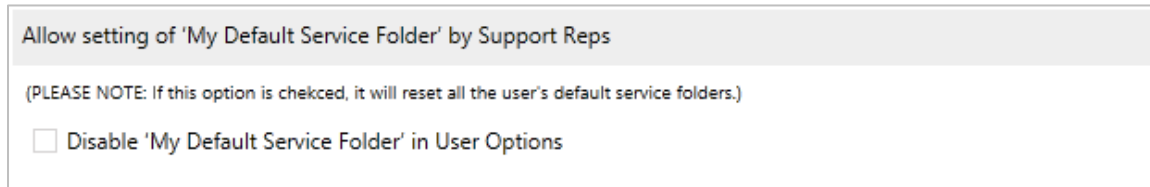
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## Feature Requests

The following client-requested features have been implemented as of ServicePRO 14.1.1.16.

### 1.1. Enable/Disable My Default Service Folder in User Options

ServicePRO now 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 checked, it will reset all the user's default service folders.)

Disable 'My Default Service Folder' in User Options

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



My Default Service Folder

Folder Name:

This setting will affect the Assign Work function as follows: 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:

- i. 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).
  - ii. 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.
2. 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.

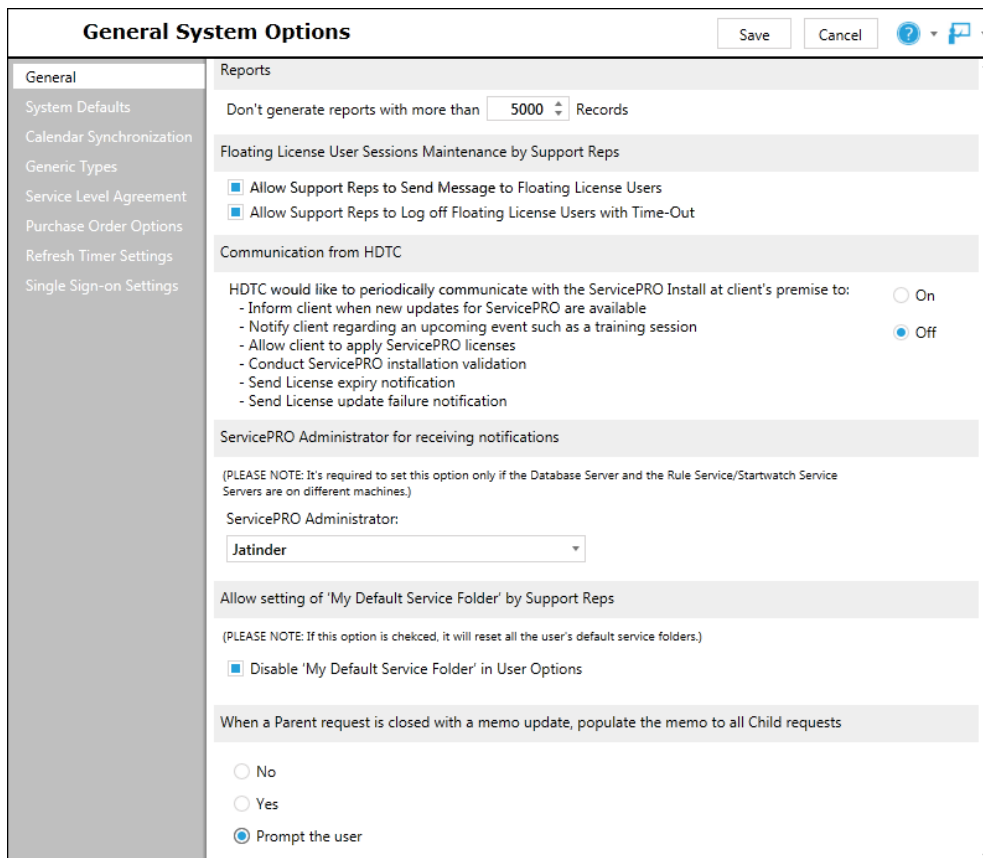
If a user attempts to assign a request to 'Myself' (i.e. to their own service) and the request currently resides in a folder where they do not have Support Rep roles assigned, then the User will be prompted to select a folder from the list of Available Folders where they have been granted support rep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

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

## 1.2. Child and Parent Request Memos – Update memo on all child requests when the parent request’s memo is updated and closed

General System Options now 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 current memo in parent requests will also be populated into the memos for each child request when the parent request is closed.

- **No** – No action will be performed; upon closing the Parent Request, the current memo in the Parent Request will not be populated in all Child Requests (default setting).
- **Yes** – The current 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 current Parent Request memo should be populated into all Child Requests when the Parent Request is closed.

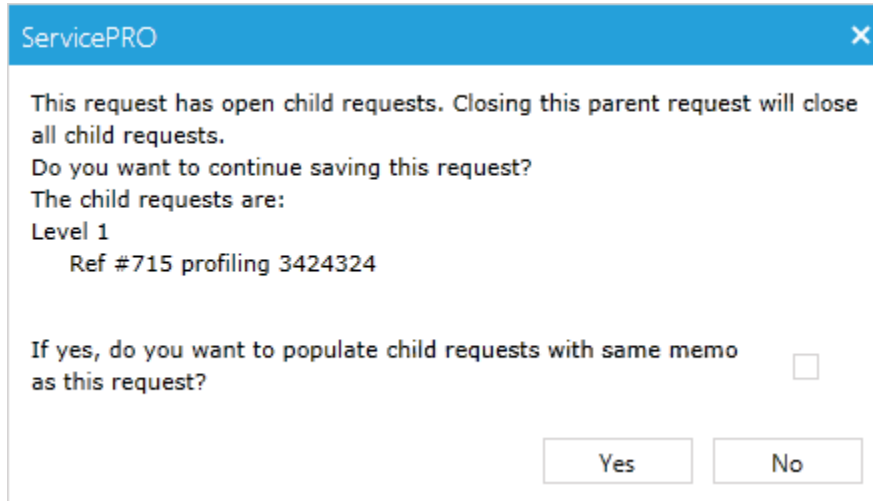


The screenshot shows the 'General System Options' dialog box. The 'General' tab is selected in the left sidebar. The main content area is divided into several sections:

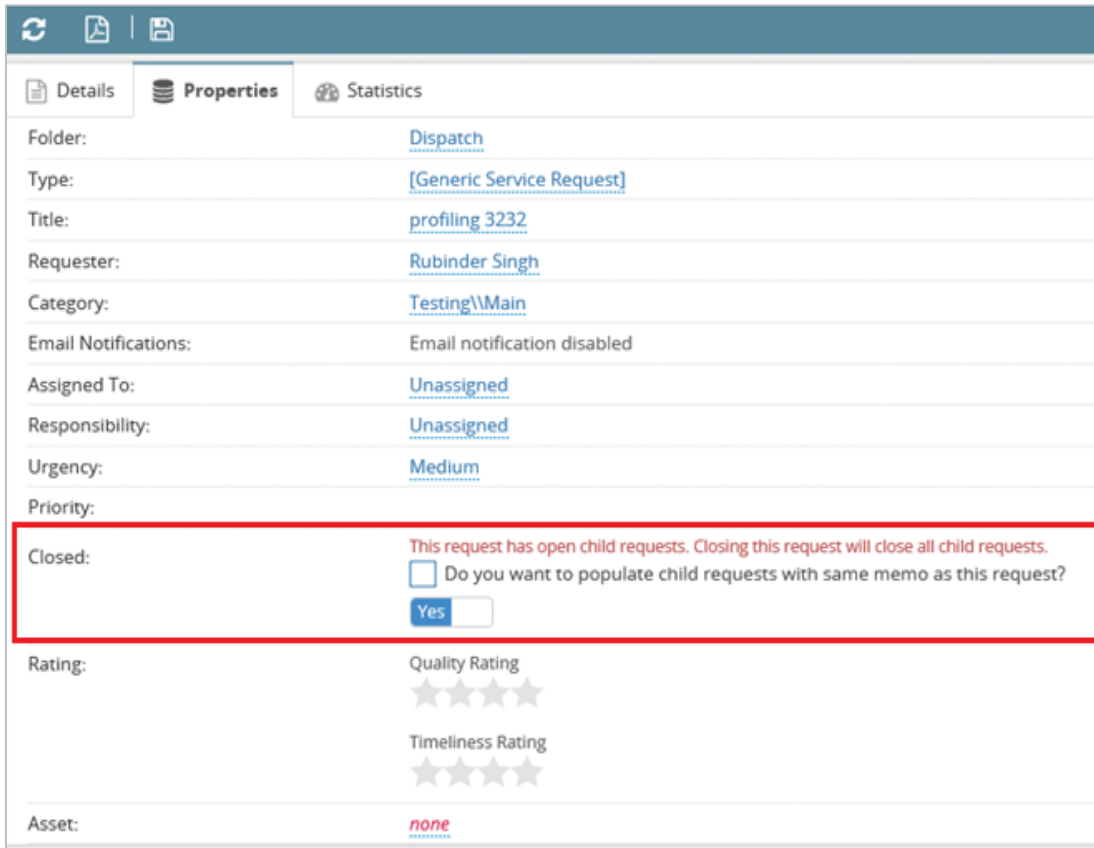
- Reports:** A dropdown menu set to '5000' and the text 'Records'.
- Floating License User Sessions Maintenance by Support Reps:** Two checked checkboxes: 'Allow Support Reps to Send Message to Floating License Users' and 'Allow Support Reps to Log off Floating License Users with Time-Out'.
- Communication from HDTC:** A list of actions (Inform client, Notify client, Allow client to apply licenses, Conduct installation validation, Send license expiry notification, Send license update failure notification) with radio buttons for 'On' and 'Off'. 'Off' is selected.
- ServicePRO Administrator for receiving notifications:** A dropdown menu set to 'Jatinder'. A note below states: '(PLEASE NOTE: It's required to set this option only if the Database Server and the Rule Service/Startwatch Service Servers are on different machines.)'
- Allow setting of 'My Default Service Folder' by Support Reps:** A checked checkbox 'Disable 'My Default Service Folder' in User Options'. A note below states: '(PLEASE NOTE: If this option is checked, it will reset all the user's default service folders.)'
- When a Parent request is closed with a memo update, populate the memo to all Child requests:** Three radio buttons: 'No', 'Yes', and 'Prompt the user'. 'Prompt the user' is selected.

### 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.



Details		Properties	Statistics
Folder:	<a href="#">Dispatch</a>		
Type:	<a href="#">[Generic Service Request]</a>		
Title:	<a href="#">profiling 3232</a>		
Requester:	<a href="#">Rubinder Singh</a>		
Category:	<a href="#">Testing\\Main</a>		
Email Notifications:	Email notification disabled		
Assigned To:	<a href="#">Unassigned</a>		
Responsibility:	<a href="#">Unassigned</a>		
Urgency:	<a href="#">Medium</a>		
Priority:	<a href="#">Medium</a>		
Closed:	<p>This request has open child requests. Closing this request will close all child requests.</p> <input type="checkbox"/> Do you want to populate child requests with same memo as this request? <input checked="" type="radio"/> Yes		
Rating:	Quality Rating ★★★★★ Timeliness Rating ★★★★★		
Asset:	<i>none</i>		

### 1.3. Child and Parent Requests – Trace in Child request when merged to Parent request OR split from Parent request

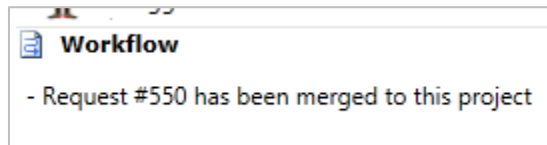
Trace memos will now be included in Child Requests that have been merged to OR split from a Parent Request as well.

Previously, these Trace memos would only be included in the Parent Request where merging or splitting operations occurred.


#### Parent Requests

Trace memos in Parent Requests.

- **Merge**




- **Split from Project**

 **Workflow**  
- Request #550 has been removed from this project


### Child Requests

Trace memos now appear in Child Requests as well.

- **Merge**

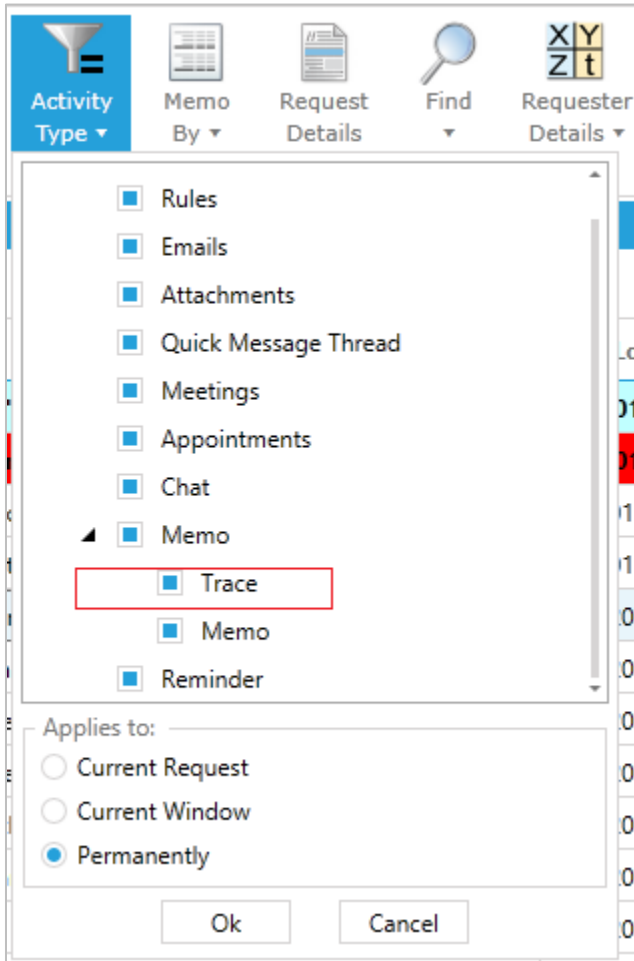
 **Workflow**  
- This request has been merged to project request #641

- **Split from Project**

 **Workflow**  
- This request has been removed from project request #641

#### 1.4. Option to remove Trace in the Workflow Memo

Users can now filter out Trace memos from the Activity Stream using the new “Trace” checkbox option, under Activity Type filters.



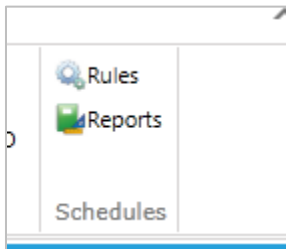


## 1.5. New Standard Reports: Details for Rules and Report Schedules

Two new Standard Reports have been implemented:

- Custom Report Schedule details
- Rules Schedule details

Examples of these reports are shown below.



<p><b>Reports List</b></p> <ul style="list-style-type: none"> <li>Standard Reports             <ul style="list-style-type: none"> <li>Schedules                 <ul style="list-style-type: none"> <li>Reports</li> </ul> </li> </ul> </li> </ul>	<p><b>Reports List</b></p> <ul style="list-style-type: none"> <li>Standard Reports             <ul style="list-style-type: none"> <li>Schedules                 <ul style="list-style-type: none"> <li>Rules</li> </ul> </li> </ul> </li> </ul>
<p><b>Alphabetical Range</b></p> <p><input checked="" type="radio"/> Use Alphabetical Range</p> <p>From: <input type="text" value="A"/></p> <p>To: <input type="text" value="B"/></p> <p><input type="radio"/> Get items starting with special characters and numbers</p> <p><input type="button" value="Preview Report"/></p>	<p><b>Alphabetical Range</b></p> <p><input checked="" type="radio"/> Use Alphabetical Range</p> <p>From: <input type="text" value="A"/></p> <p>To: <input type="text" value="B"/></p> <p><input type="radio"/> Get items starting with special characters and numbers</p> <p><input type="button" value="Preview Report"/></p>
<p><b>Description</b></p> <p>Listing of Custom Report Schedules</p> <p>1 Item</p>	<p><b>Description</b></p> <p>Listing of Business Rule Schedules</p> <p>1 Item</p>

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**Lakspur**  
**Custom Report Schedules Report**



Includes Reports Starting With a Letter From 'A' to 'X'

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**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**

## Lakspur Rule Schedules Report



Includes Rules Starting With a Letter From 'A' to 'X'

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

**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**

## 1.6. Option to send request history via emailing as either .txt file or PDF

Provided a new option to email Request History as a .PDF attachment instead of a .txt file; Administrator users can enable this option with a SQL Management console with the following settings:

- OptionID: 16897 (LngValue: 0 = Text, 1 = PDF)
  - By default, value is 0 (text)
- Using a SQL management console:
  - To email request history in .PDF format:  
`UPDATE tbloptions SET LngValue = 1 WHERE OptionID = 16897`
  - To email request history in .txt format:  
`UPDATE tbloptions SET LngValue = 0 WHERE OptionID = 16897`

## 1.7. Update – Option to Allow Past Due By

Implemented validation behavior for the “Request Due By” value 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)
  - `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)
  - `UPDATE tbloptions SET LngValue = 1 WHERE OptionID = 16899`
- To **allow past “due by” value** (no prompt displayed)
  - `UPDATE tbloptions SET LngValue = 2 WHERE OptionID = 16899`

## 1.8. 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.

### 1.9. 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’.

