workflow management solution

July 2020
Feature Requests
Documentation

14.2.17.x

Table of Contents

ServicePRO Feature Enhancements

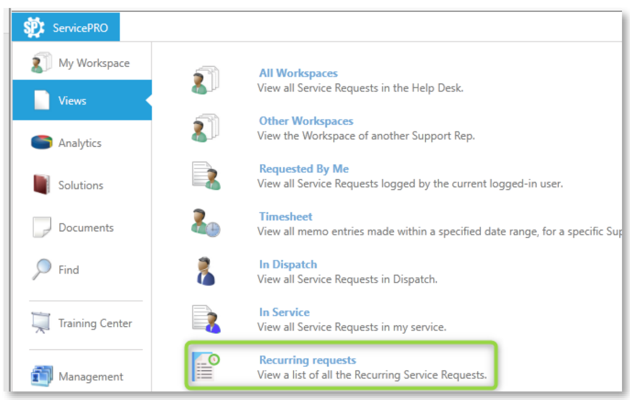
The following client-requested features have been implemented as of ServicePRO 14.2.17.x version.

Recurring Requests, Recurring Projects, Recurring Templates

ServicePRO has a new view called “Recurring Requests”, which facilitates users with the “Project Designer” role to view and manage all the Recurring requests. In addition, the Project Templates Designer list has been enhanced to filter, view and manage the recurring Project templates only. Similarly, the Templates designer list has been enhanced to filter view and manage the recurring templates only.

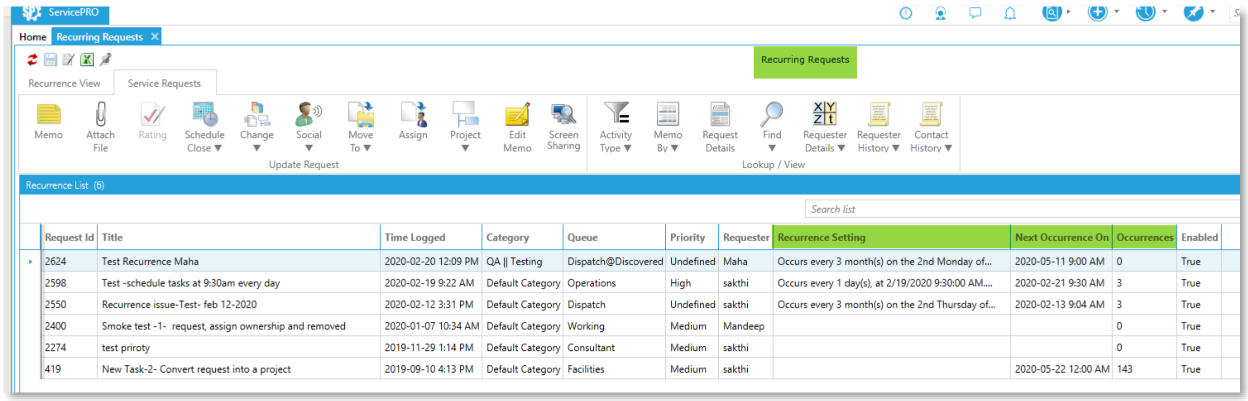
Recurring Requests View

Below screenshot shows the newly introduced ‘Recurring requests’ view option under “Views” backstage menu.



- The “Recurring Requests” view lists all the service requests on which Recurrence has been set.
- The Recurring requests list displays the following recurrence specific columns and this list cannot be customized:
    - Recurrence Setting
    - Next Occurrence On
    - Occurrences.
- Only the primary request on which the recurrence is set is displayed in this list. The requests that were created out of this recurrence will not be displayed.

NOTE:	Recurring requests created via business rules will not be displayed in this list.

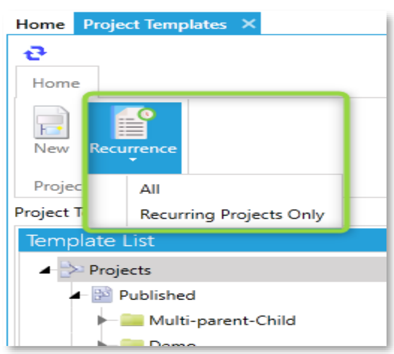


Enhancements to Project Templates List

Project templates list has a new Recurrence ribbon menu option that helps the user to filter, view and manage just the Recurring Project templates.

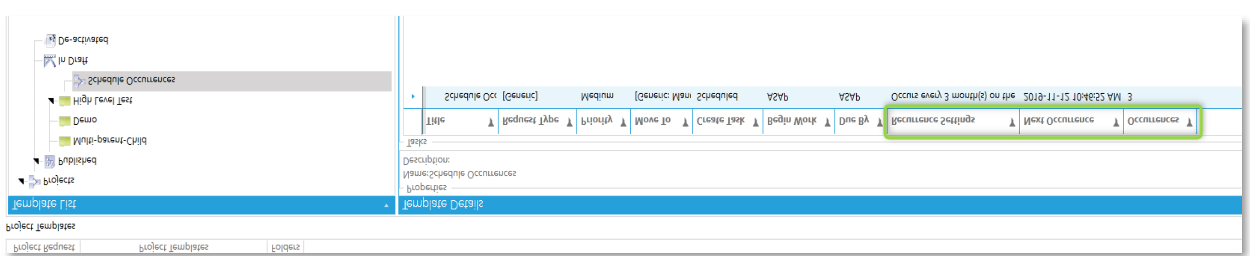
Below are the two options to filter the templates:

- **All:** lists all recurring and non-recurring Project templates
- **Recurring Projects Only**: Lists all recurring Project templates only



By default, the option “All” is selected when we navigate to the Project templates list. When the user selects the option “Recurring Projects Only”, only the Project Templates that have recurrence set on them will be filtered and displayed.

The template details view has three recurrence specific columns added: ‘’Recurrence settings”, “Next Occurrence” and “Occurrences” which display the details on the recurrence if set.



Enhancements to Quick Templates List

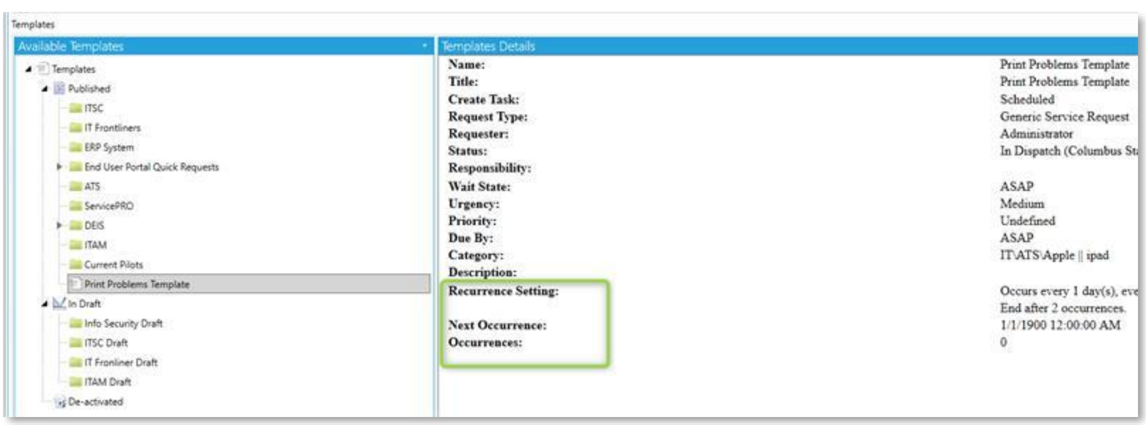
Templates list has a new Recurrence ribbon menu option that helps the user to filter, view and manage just the Recurring templates.

Below are the two options to filter the templates:

- **All:** lists all recurring and non-recurring templates
- **Recurring Projects Only**: Lists all recurring templates only

By default, the option "All" is selected when we navigate to Templates list. When the user selects the option "Recurring Templates Only", only the Templates that have recurrence set on them will be filtered and displayed.

The template details view has three recurrence specific columns added: ''Recurrence settings", "Next Occurrence" and "Occurrences" which display the details on the recurrence if set.



Custom Forms

Encryption for the "Text" Custom Fields

While adding a new text field in the custom form designer for both existing and new custom forms, the ServicePRO user will be presented with a new property called "Encrypted". If this property is checked, the data stored in the database for this field is encrypted and not in legible format. Once the

“Encrypted” property is enabled for a text field and the form is saved, the encryption can never be removed from the saved text field.

When the field is displayed in ServicePRO, ServicePRO Web or in Email Notifications, the data value in the field will be displayed in normal text format.

Trace memo shown in the Service Request Activities will not display the data from Encrypted text fields even when trace is enabled on the field. The Trace memo will just state: “UDF [Field Name] is updated by the user”.

User can encrypt two types of custom fields:

- Text Field (Single line)
- Text Field (Multiple lines)

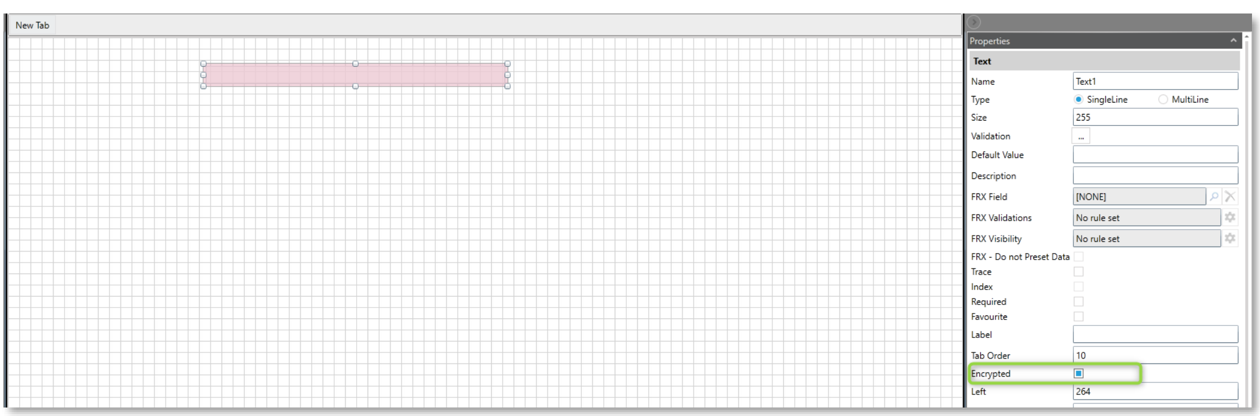
Setting Encryption is allowed only for newly created Text fields in the Custom Forms whereas existing Text fields cannot be marked as “Encrypted”.

Once a text custom field is set as encrypted, it cannot be changed back to decrypted and encrypted custom fields cannot be used in blank reports.

NOTE#1: For the existing saved Text fields in a custom form, the property “Encrypted” will be disabled. Therefore, the user cannot switch an existing field from “Encrypted” to “Not Encrypted” and vice-versa.

NOTE#2: Index and Encrypted properties for the text custom field are mutually exclusive. If “Encrypted” property is checked, then “Index” property will be unchecked and disabled and vice-versa.

Below screenshot shows the newly introduced property “Encrypted” for Text custom field:



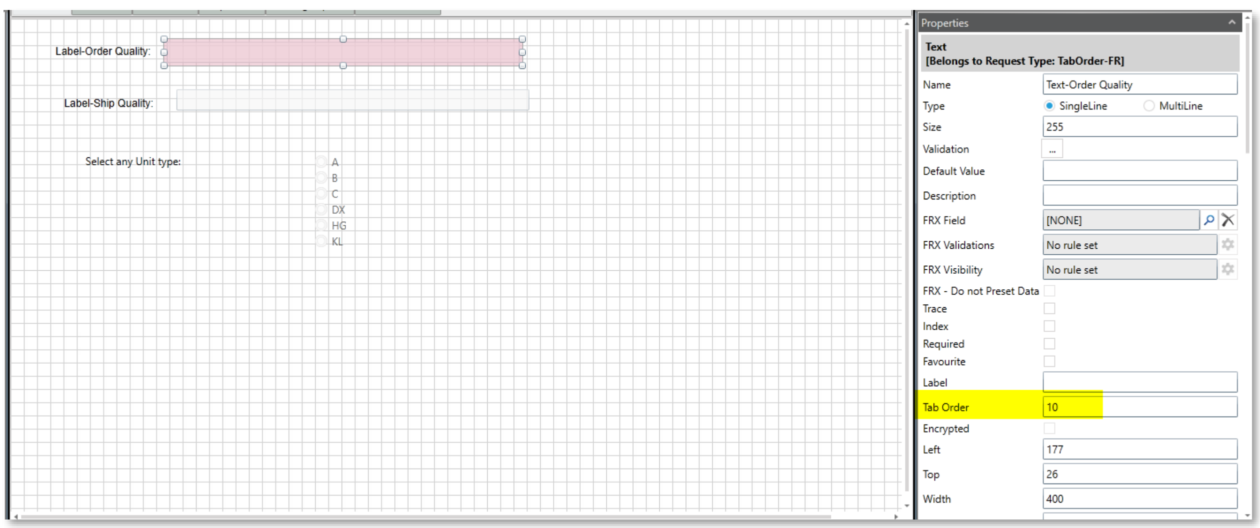
Custom Forms – Tab Order for Fields and Tabs

In the Custom Form Designer, “Tab Order” property for custom fields can be set by the user while creating a new custom field or updating an existing custom field. The user can also set the ‘Tab Order’ for tabs in a custom form. This gives flexibility to the user in setting the tab order for the fields and tabs as per their requirements.

For the existing custom fields and tabs, the original tab order that was set by default by the system will continue to work unless it’s modified by the user.

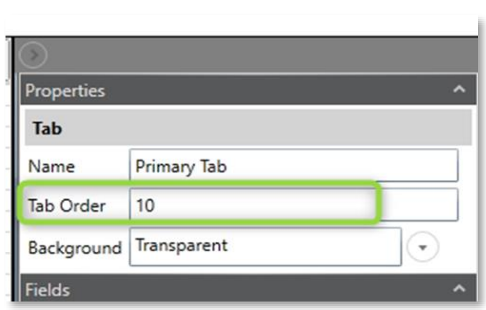
The Tab Order property is not visible for graphical elements such as Label, Border, Image, Horizontal and vertical lines and is also disabled for reference fields.

Selecting an input field in the custom form, the properties panel shows the “Tab Order” property as shown below:



“Tab order” property is set by default to 10 for the first field added within a tab and increments by 10 for every new field added in the specific tab.

Selecting a tab in the custom form, the properties panel shows the “Tab Order” property as shown below:



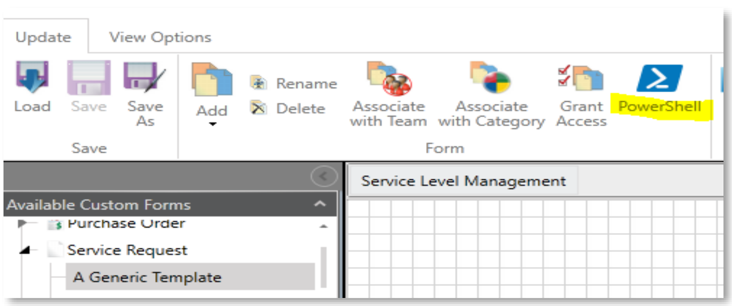
User can change the "Tab Order" value as needed, but it must be greater than 0. If there is a conflict in the tab order between two input fields within a tab OR between 2 tabs, a validation message will be displayed to the user.

PowerShell Integration

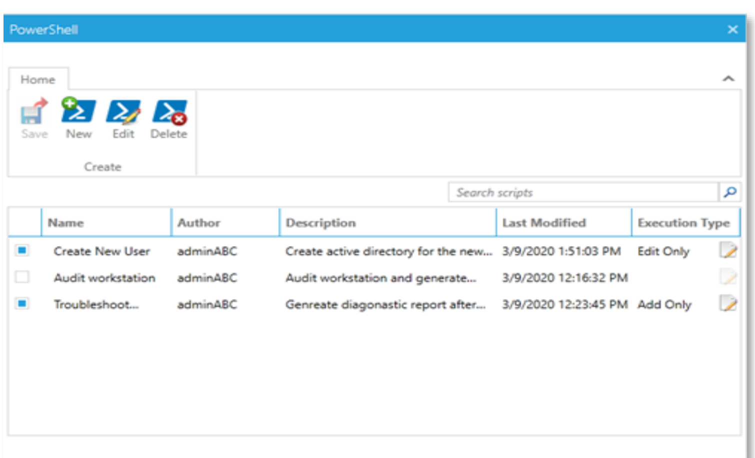
ServicePRO's PowerShell integration feature allows administrators to integrate ServicePRO with an external system for automation. When a new user is created in ServicePRO, using the PowerShell integration feature, the same user can be created in Active Directory with a mailbox. This feature has been added to the Custom Form Designer, therefore it allows the PowerShell script to access custom fields for the automation.

One or more PowerShell scripts can be configured to execute either at the time of creating a new custom entity (i.e. User, Request, Queue etc.), or at the time of updating an existing custom entity or both. It is also possible to configure email notification when setting PowerShell script with a custom form so that the recipient can receive an email with the results from the specific PowerShell script execution.

"PowerShell" ribbon menu option has been added to facilitate the association of a new or an existing PowerShell script to the selected custom form.



When the user selects one of the custom forms under "Available Custom Forms", the PowerShell ribbon menu option will be enabled. When the user clicks on the "PowerShell" option, by selecting any custom form entity, it opens the below PowerShell pop-up window, listing all PowerShell scripts.

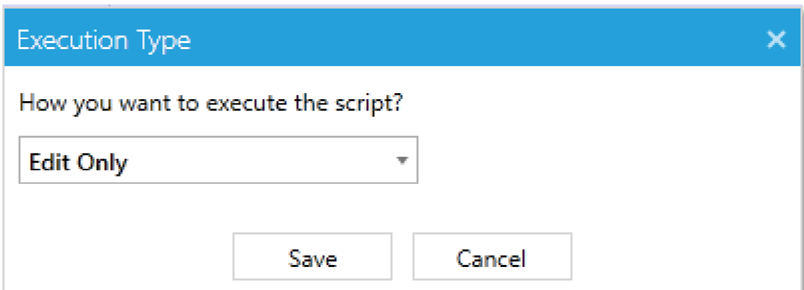


The “PowerShell” window has the following menu options:

1. **New**: User can create a new PowerShell script
2. **Edit**: User can edit the selected PowerShell script
3. **Delete**: User can delete the selected PowerShell script
4. **Save**: Saves the PowerShell Script associations set for the currently selected Custom Form.

The user can associate one or more PowerShell script(s) in the list to the selected custom form by selecting the checkbox next to the name of the script.

When the checkbox is checked for a script, then the PowerShell script is associated to the custom form and it will prompt the user to select an execution type:



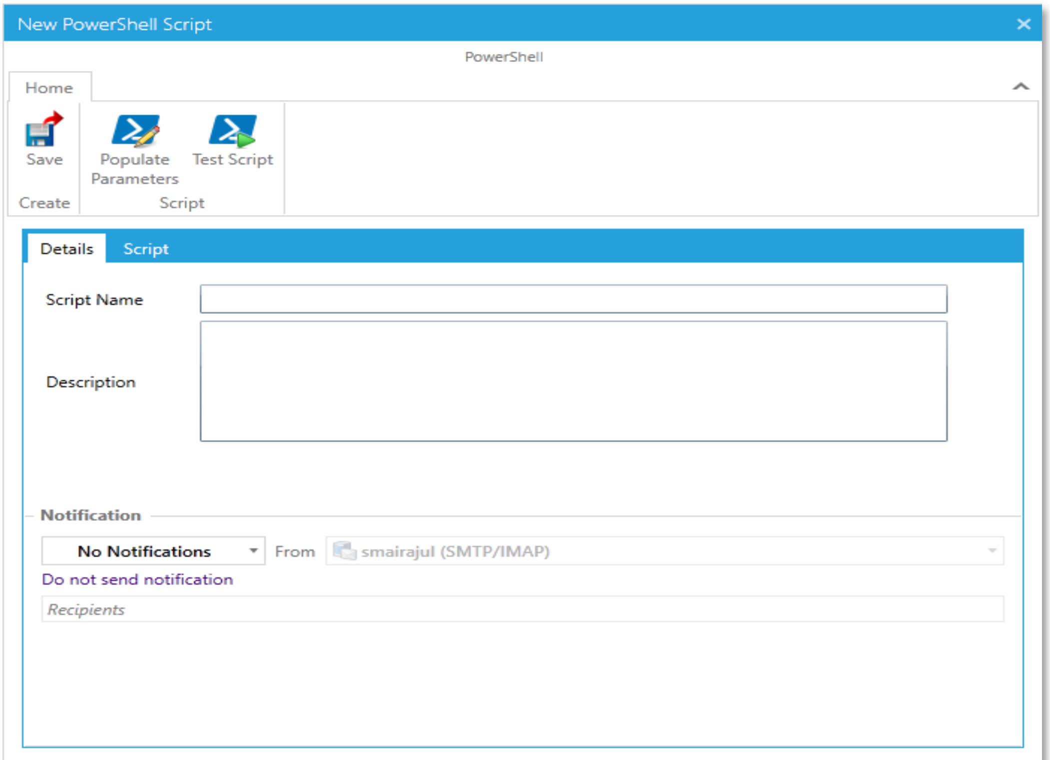
User can select one of the following options from the dropdown list to indicate when to execute the PowerShell script:

i. **Add only**: Execute PowerShell script at the time of creating an entity/object.
For e.g.: while creating a new request or a new user.
ii. **Edit only**: Execute PowerShell script at the time of updating an entity/object.
For e.g.: while updating an existing request or user.
iii. **Add and Edit**: Execute the PowerShell script in both the cases: Creating an entity and updating an entity.

“Search box in the PowerShell List” – This facilitates the searching for a script in the list of available PowerShell Scripts. It searches on the following fields: Script Name, Script Author, Script Description, and Last Modified.

New/Edit PowerShell Script

When the user clicks on the “New” option in the PowerShell window, the below “New PowerShell Script” will be displayed. In this window, user can enter all the details for the new script including the script itself, its parameters, and notifications and save the script.



PowerShell Script - Details tab

Under Details tab, the user should enter the script details such as Script Name, Description, and Notification.

Email notification can be set using one of the following options:

- No Notification: Notification will not be sent
- Failed notification: Send only failure notification (when PowerShell script resulted to an error)
- All notification: Send failure or success notification

When “Failed Notification” or “All Notification” option is selected, in the Recipients autocomplete text box, the user can add multiple users who should be notified.

Sample Email Notification is as follows:

Email Subject: FYI: ServicePRO PowerShell: Create New User

Email Attachment Name: “Create New User-YYYY-MM-DD-HH-MM.txt”

Email Body:

Hi {Recipient Name},

Please be informed that ServicePRO executed Create New User PowerShell script when adding service request. Execution log is attached with this email for more details.

Entity Name: Service Request

Operation: adding

This email is generated by ServicePRO PowerShell integration module. Please do not reply to this email as it may not be monitored.

PowerShell Script - Script tab

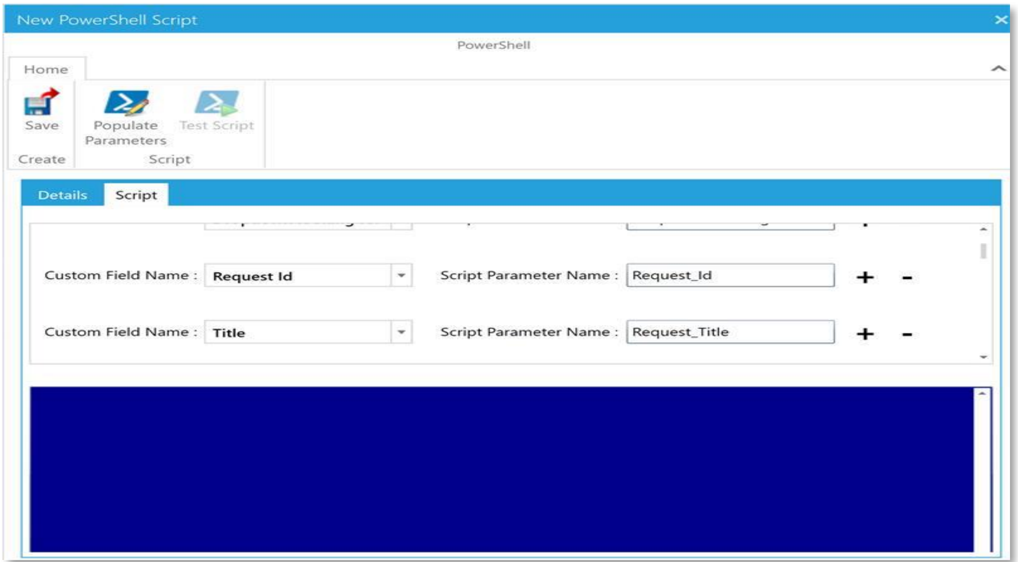
Under “Script” tab, there are 2 sections:

- **Top section – Parameters List**: The user can add or delete parameters which are required to execute the script along with the ServicePRO fields from where the parameter value should be passed. (i.e. a mapping between ServicePRO Fields and PowerShell Script Parameters)

  By default, there will be an empty row to start adding parameters. User can add or delete parameters by clicking plus (**+**) or minus (**-**) buttons in the end of each item.

  In the parameter list, “Custom Field Name” drop down choices are populated from the name of input fields in the selected custom form and a set of regular base fields for the specific object/entity. The user must choose the name of the ServicePRO field from which the Script Parameter value should be passed. In the “Script Parameter Name” text box, the user should specify the name of the actual PowerShell Script parameter.

- **Bottom Section – PowerShell Script**: The user should enter the actual PowerShell script in the multi-line text box with blue background color at the bottom.



Populate Parameters Menu Option

When the user clicks on “Populate Parameters” option, the application populates the Parameters list with one item each for all the allowed regular fields for the entity and for all custom input fields based on the selected custom form. The user can delete the unwanted items in this list and plan to map only the needed fields to the appropriate PowerShell Script Parameters by entering the “Script Parameter Name” in the particular row.

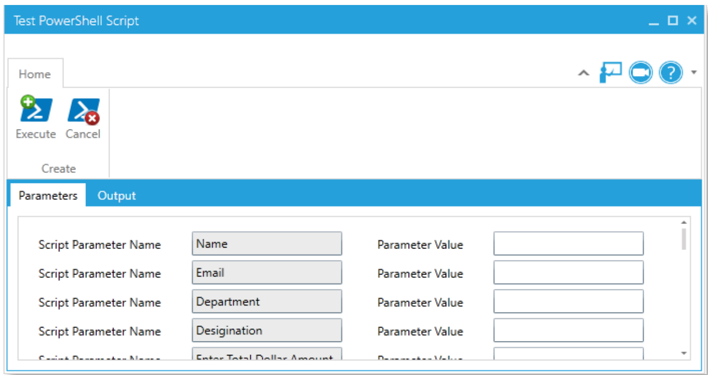
The input custom fields like Checkbox, Date, Dropdown, Formula, Hyperlink, LookUpBox, MaskedEntry, Numeric, Radio Button, Text are considered for populating parameters to the PowerShell script. Along with these custom fields, the regular ServicePRO fields as listed in the table below will also populated, according to the object selected:

User	Category	OU/Folder	Best Solutions	Purchase Order	Service Request	Purchase Request	Company	Asset	Product
ID	Category ID	Queue ID	ID	N/A	Request ID	Request ID	ID	ID	ID
Name	Category Name	Queue Name	Title		Title	Title	Name	Name	Name
Email					Status	Status			
Phone					Queue Id	Queue Id			
Mobile					Queue Name	Queue Name			
					Request Type Id	Request Type Id			
					Request Type	Request Type			
					Urgency	Urgency			
					Priority	Priority			
					Category Id	Requester Id			
					Category Name	Requester Name			
					Requester Id	Requester Email			
					Requester Name	Support Rep Id			
					Requester Email	Support Rep Name			
					Support Rep Id	Support Rep Email			
					Support Rep Name	Requester Mobile			
					Support Rep Email	Support Rep Mobile			
					Requester Mobile				
					Support Rep Mobile				

Test Script Menu option:

After the user keys in a PowerShell script in the Script section, the “Test Script” option will be enabled. User can test the PowerShell script by clicking the “Test Script” option. This helps to make sure that the script works without any errors.

When the user clicks on “Test Script” option, the below “Test PowerShell Script” window will popup, where the user can enter the values for the Script parameters.



Once the parameter values are entered, the user can click on the “Execute” button to test the execution of the script. While executing the PowerShell script, the form will be disabled and will display the status as “Executing..”. After the completion of Script execution, the results of the execution will be displayed in the “Output” tab. And also, the configured email notifications for the Script will be sent out to the specified recipients.

Enhancement to System Options

Default Culture for ServicePRO

A new System Option “Default Culture for ServicePRO” has been introduced to facilitate rendering the specified currency format throughout ServicePRO [for eg: Asset Cost in the Asset Properties view].

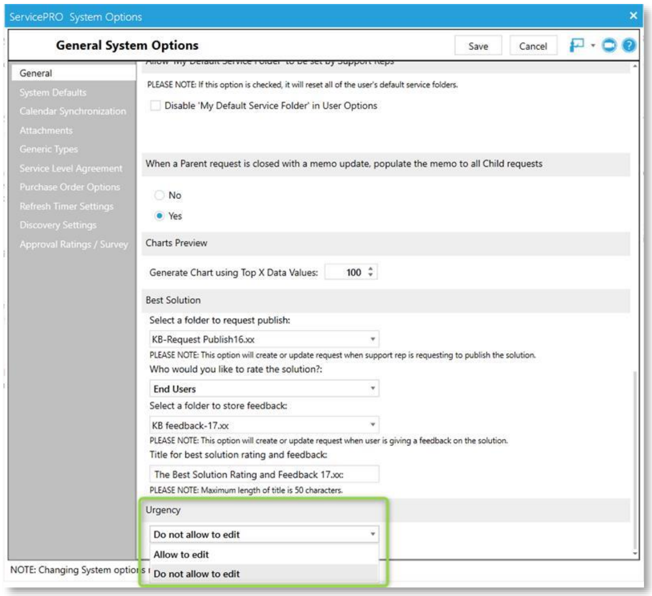
Ability for Support Reps to update Request Urgency

ServicePRO now provides the ability for the Support Reps to update the Urgency field of a Service Request after the request is moved out of dispatch. This option is controlled by the ServicePRO Administrator and is located under System Options.

A new system option called “Urgency” has been added under the “General” section with the following two choices:

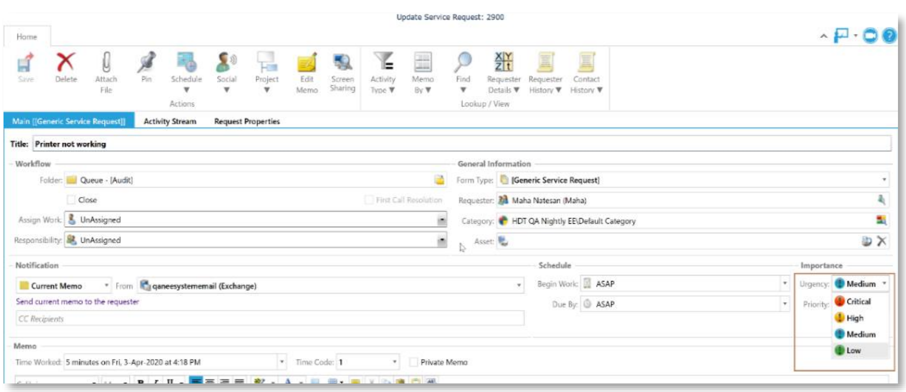
- **Do not allow to edit**
- **Allow to edit**

The Default selection for this option is “Do not allow to edit” which will ensure the same behavior as in previous versions of ServicePRO.

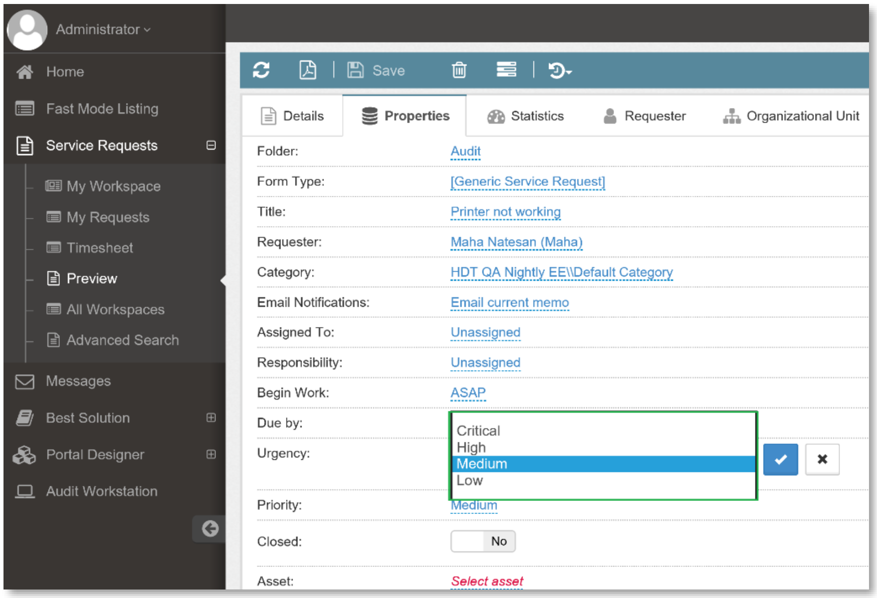


When the ServicePRO Administrator selects "Allow to Edit" option for "Urgency" field under System Options, the Support Reps will be allowed to update the Urgency field for the existing service requests that they have access to, even after the request is moved out of dispatch.

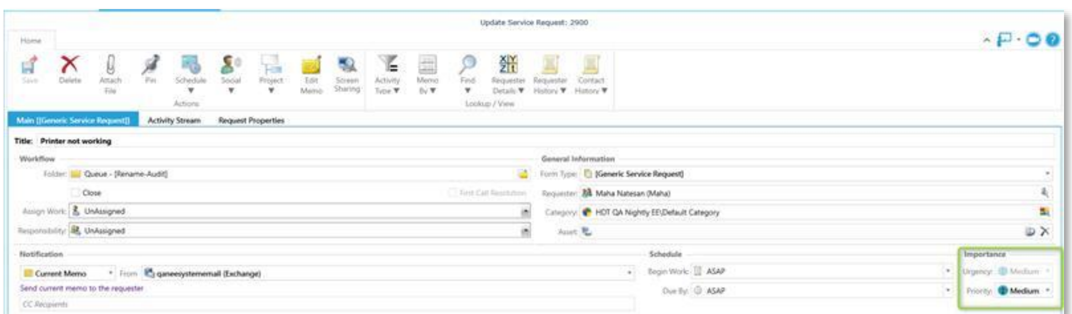
Editing of Urgency for Support reps from ServicePRO:



Editing of Urgency for Support Reps from ServicePRO Web:



When ‘Do not Allow to Edit’ option is selected in System options, as shown in the screen shot, the “Urgency” field is disabled for the Support Reps after the request is moved out of dispatch.



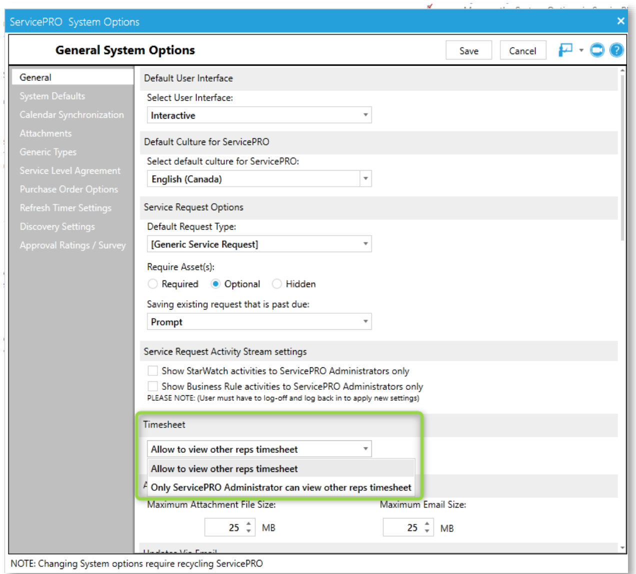
NOTE:	If the request is in Dispatch, the Urgency field will be enabled for the privileged user. There is no change in this behavior.

Restricted Timesheet View

ServicePRO provides a new system level option for the ServicePRO Administrators to control the ability of Support Reps to view other Support Reps’ Timesheet and this option is controlled from the ServicePRO ‘System Options’.

A new “Timesheet” dropdown option has been added under “General” section in the System Options with the following two choices:

- **Allow to view other reps timesheet**
- **Only ServicePRO Administrator can view other reps timesheet**



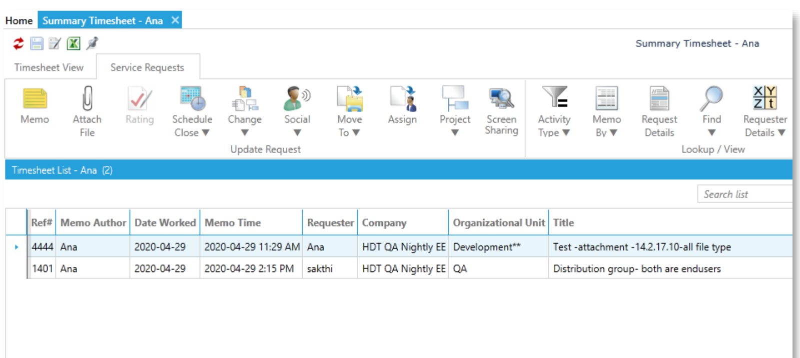
By default, “Allow to view other reps timesheet” option is chosen by the system. With this option, all the support reps can view other support reps timesheet as in the previous versions of ServicePRO.

When the option “Only ServicePRO Administrator can view other reps timesheet” is selected, the support reps are restricted from viewing other reps timesheet, and only the ServicePRO Administrator will be able to review all the Support Reps timesheets.

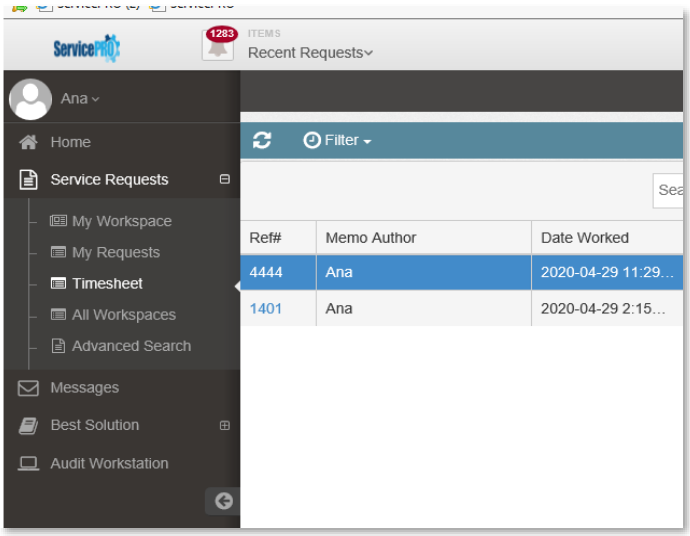
Changes to Timesheet View

When the option “Only ServicePRO Administrator can view other reps timesheet” is selected in the System Options:

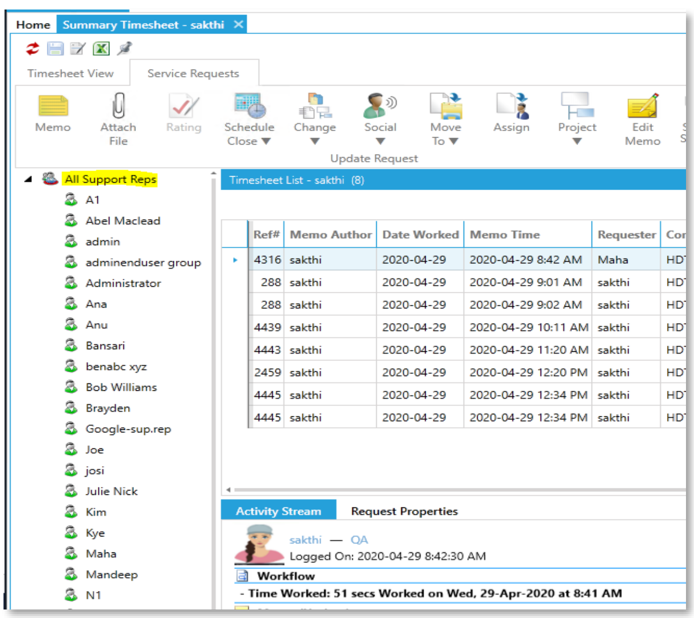
Timesheet view of a Support Rep in ServicePRO [Support Rep tree is not shown]:



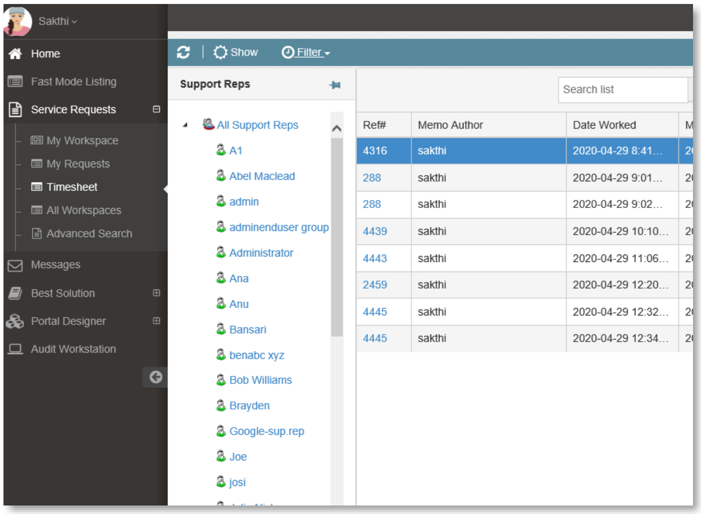
Timesheet view of a Support Rep in ServicePRO Web [Support Rep tree is not shown]:



Timesheet view of Administrator in ServicePRO [Support Rep tree is shown]:

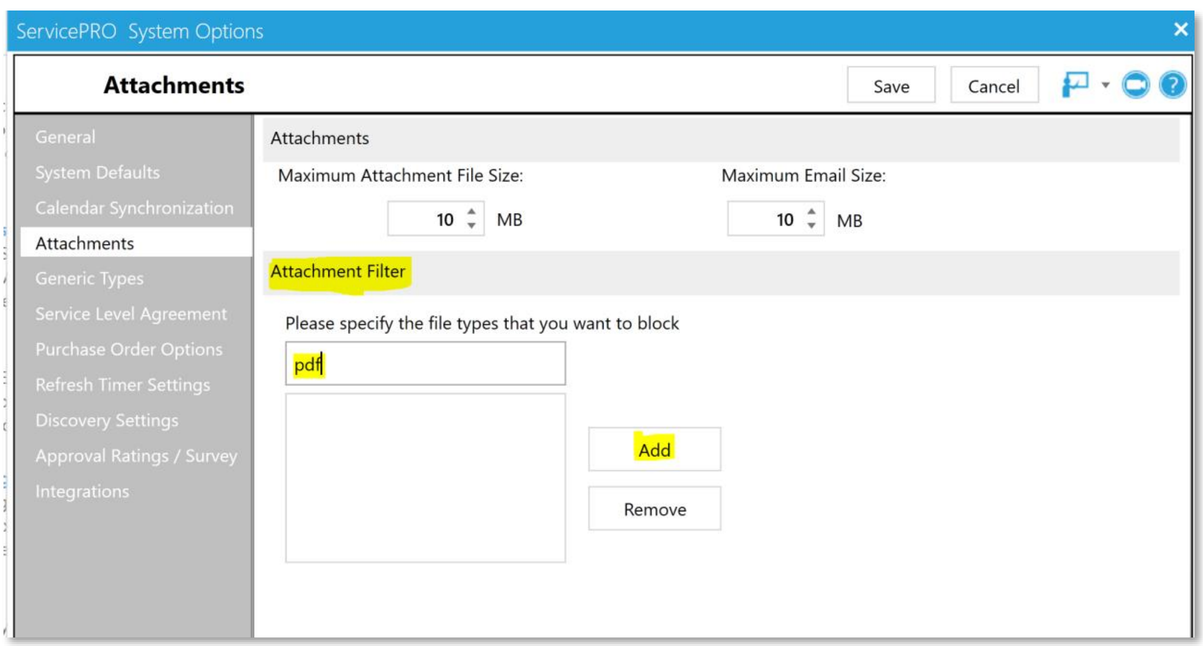


Timesheet view of Administrator in ServicePRO Web [Support Rep tree is shown]:



Attachments tab

A new "Attachments" tab has been added to System Options, where the ServicePRO Administrator can use the "Attachment Filter" option to specify which file types should be blocked from being attached to a request within ServicePRO and ServicePRO Web.



NOTE:	The 'Maximum attachment File size' and 'Maximum Email Size' options are moved from General tab to Attachments tab.

If the ServicePRO Administrator adds a specific file type in the "Attachment Filter" section for blocking and if the ServicePRO user tries to attach a document of the blocked file type from either ServicePRO or ServicePRO Web, the application will show a warning message to the user and will not allow the user to save until the attachment is removed.

End User Manager

ServicePRO facilitates the designation of an end user as a "Manager" who can view and update other end users' service requests.

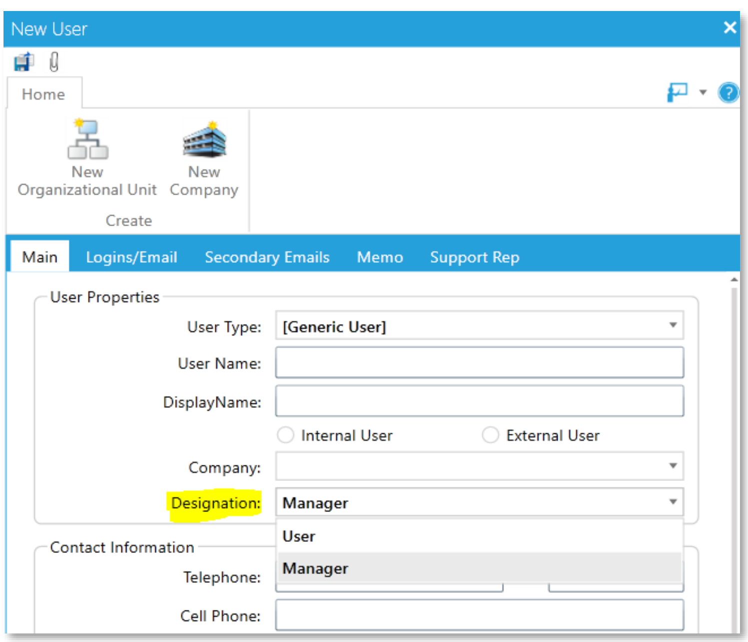
End User Managers in ServicePRO will have access to perform the following activities from ServicePRO Web.

- View the service requests created by other end users in their own company or Organizational Unit
- Update the service requests created by other end users in their own company or Organizational Unit.

Designating an End user as "Manager"

For designating an End User as a "Manager", while creating or updating an end user in ServicePRO, for '**Designation'** select "Manager" as shown in the below screenshot. The end user created can be either Internal or External.

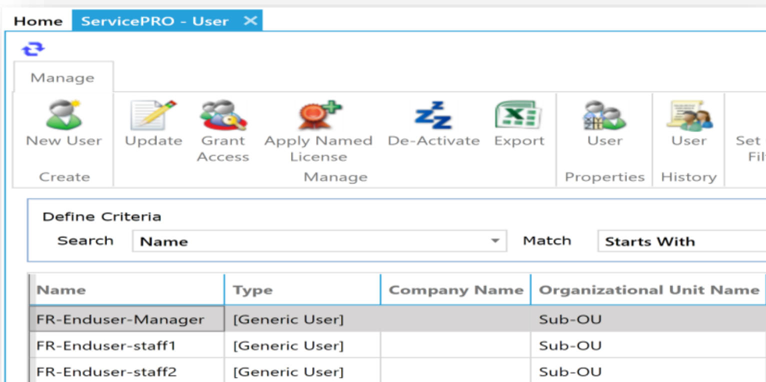
The default selection for the "Designation" field is "User". Whenever an End user that is designated as "Manager" is assigned with one or more roles, the Designation will be set back to "User", as they will no longer be considered an end user, but a privileged user.

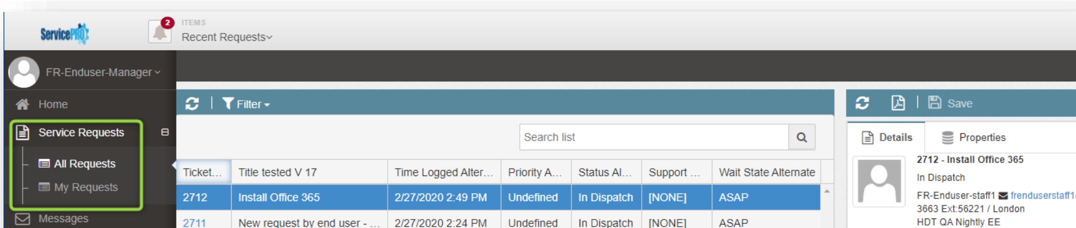


End User Manager – View/Update other End user's requests

When an internal end user that is designated as a "Manager" logs into ServicePRO Web, the user will see the newer "All Requests" option in addition to "My Requests" option in the Navigation Panel. Under "All requests" view, the Manager will see the requests logged by all the end users in their organizational unit from the "All Requests" view.

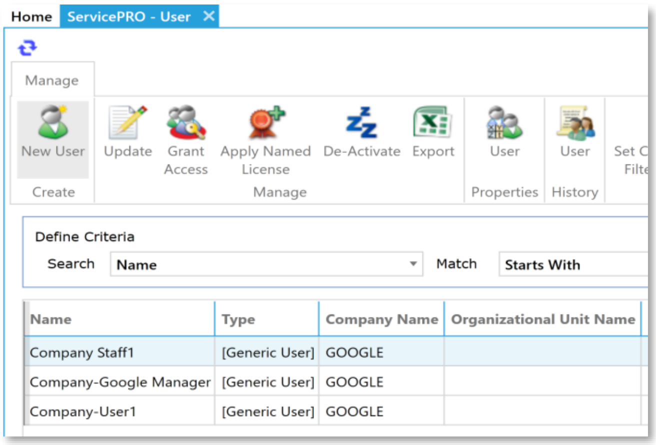
Also, the Manager will be able to update these requests in the same way as the requester can update the request.

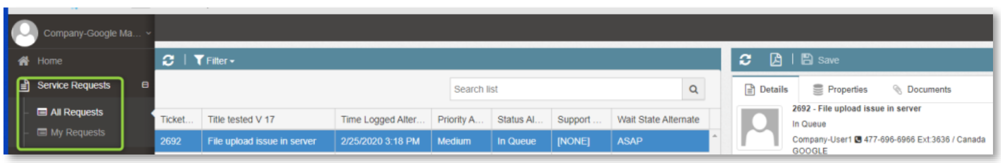




When an external end user that is designated as "Manager" logs into ServicePRO Web, the user will see the newer "All Requests" option in addition to "My Requests" option in the Navigation Panel. Under "All requests" view, the Manager will see requests logged by end users in their Company from the "All Requests" view.

In addition, the Manager will be able update these requests in the same way as the requester can update the request.





System Email Account

OAuth 2.0 EWS Authentication

ServicePRO facilitates OAuth 2.0 EWS Authentication with System email accounts, User Mail Accounts and Calendar Synchronization.

By default, when "EWS" configuration is selected either for System Email Account Setting, User Email Server Setting or in the Calendar Sync settings, the "EWS Authentication Kind" will be set to "Basic", and the Basic EWS authentication will continue to work as before.

Pre-requisites

In order to enable the OAuth 2.0 EWS Authentication kind, the following the pre-requisites must be met. Therefore, without these settings, this feature cannot be utilized.

Step 1:

To use OAuth, an application must have an application ID issued by Azure Active Directory. Browse to the below link and follow the steps given in "Register your application" section in order to register the application.

How to Authenticate a EWS Application - Using OAuth

After completing the application registration in your Azure Active Directory, please capture the Application ID, Tenant ID and Client Secret values.

Step 2:

Update the following keys in the ServicePRO Server *web.config* file and in the exe configuration files StarWatch Service, Rule Service and Calendar Sync Service using the Application ID, Tenant ID and Client Secret that were captured after completing Step 1.

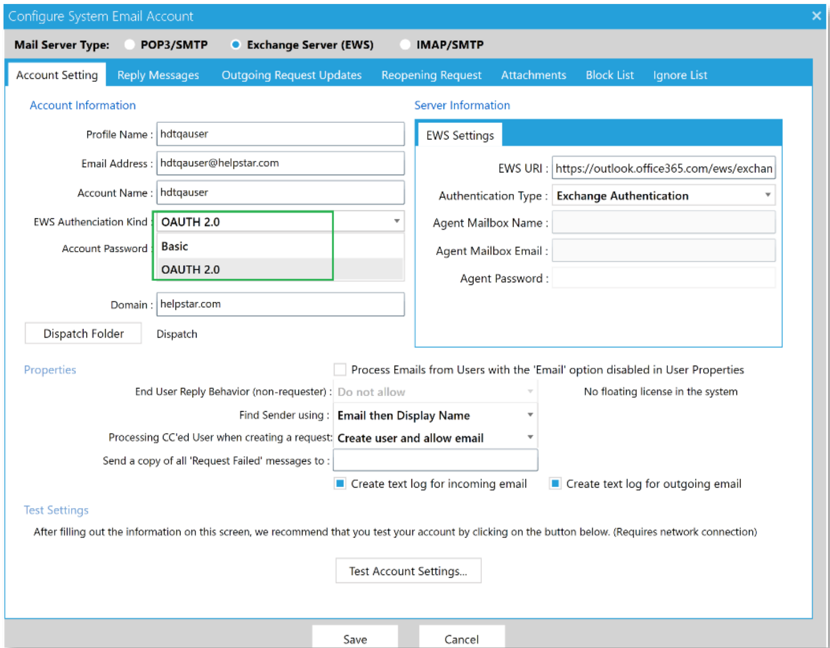
<!-- The application ID from your app registration -->
<add key="starwatchappId" value="#####" />
<!-- If you registered your app to support only users in your organization, change the value of this key to your tenant ID -->
<add key="starwatchtenantId" value="######"/>
<!-- The application's client secret from your app registration. Needed for application permission access -->
<add key="starwatchclientsecret" value="#########"/>

NOTE: *Please contact HDT support in case of any assistance required in making the above listed changes in the application configuration files. None of the above settings are required in the CONFIG files for 'Basic' EWS authentication.*

EWS Authentication Kind in System Email Account Settings

When "Exchange Server (EWS)" server type is selected in the Account Setting section, a new field "EWS Authentication Kind" shows up. This field has two options to choose from "Basic" and "OAUTH 2.0". By default, "Basic" EWS Authentication Kind is selected.

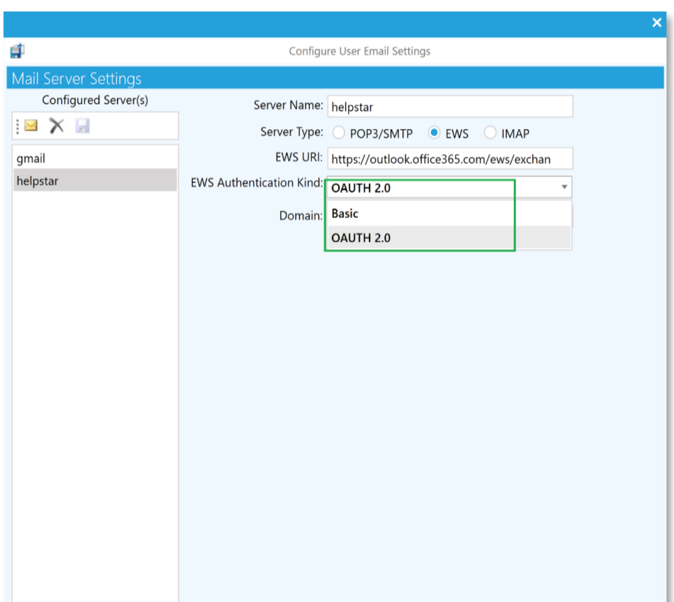
When 'OAuth 2.0' is selected for EWS Authentication Kind, ServicePRO and StarWatch Service access the mailbox using the OAuth 2.0 authentication method, by utilizing the App ID, Tenant ID and Client Secret entered in the CONFIG files.



EWS Authentication Kind in User Email Server Setting

In the User Email Server Setting, when "Exchange Server (EWS)" server type is selected, a new field "EWS Authentication Kind" shows up. This field has two options to choose from "Basic" and “OAUTH 2.0". By default, “Basic” EWS Authentication Kind is selected.

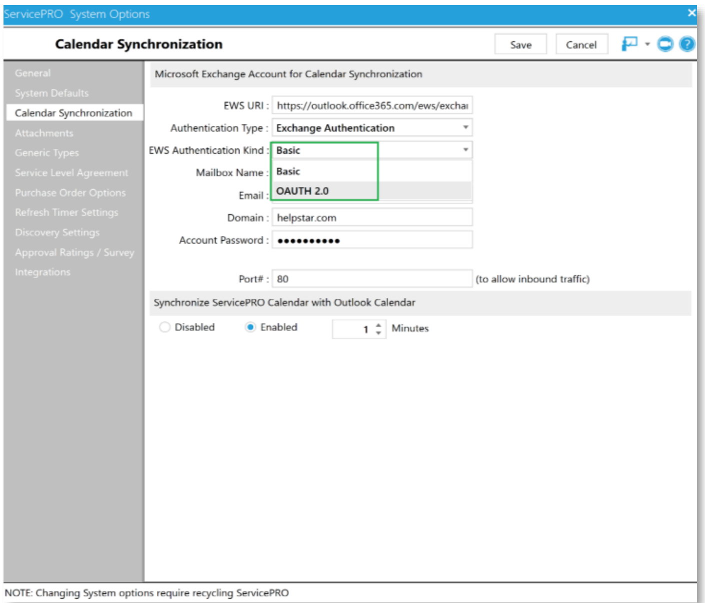
When ‘OAuth 2.0’ is selected for EWS Authentication Kind, ServicePRO accesses the user’s mailboxes using the OAuth 2.0 authentication method, by utilizing the App ID, Tenant ID and Client Secret entered in the CONFIG files.



EWS Authentication Kind in Calendar Synchronization

Under “Calendar Synchronization’ tab in System Options, a new option ‘EWS Authentication kind’ is added. This field has two options to choose from "Basic” and “OAUTH 2.0". By default, “Basic” EWS Authentication Kind is selected.

When ‘OAuth 2.0’ is selected for EWS Authentication Kind, Calendar Sync Service accesses the mailboxes using the OAuth 2.0 authentication method, by utilizing the App ID, Tenant ID and Client Secret entered in the CONFIG files.



Handling of ‘CC’ user who is not present in ServicePRO

In System Email Account settings, added a new field to specify the handling of ‘CC’ user who is not present in ServicePRO, when creating request from email processing. This field can be set by the administrator to one of the below options according to their requirement:

- Create user and allow email - This is the default option. When this option is selected, the CC user will be created as a user in ServicePRO with enabling email. This means that the emails from this user will be processed by StarWatch.
- Create user and don't allow email - When this option is selected, the CC user will be created as a user in ServicePRO with disabling email. This means that the emails from this user will not be processed by StarWatch.
- Do not create user – When this option is selected, the CC user will not be created as a user in ServicePRO. (i.e.), If this option has been selected, when a non-ServicePRO user responds via email where they are CC'ed, it will not create a new ServicePRO user.

Other Enhancements / Feature Implementations

- Azure Active Directory Pass through with Multi-Factor Authentication is implemented for ServicePRO and ServicePRO Web.
- In the Asset explorer, an option to clear/cancel the search has been implemented.
- In the Asset Explorer, Implemented the new checkbox in the Ribbon menu "Assets in Subfolders" and it is checked by default.
  - When "Assets in Subfolders" is checked, all the assets under the current node as well the assets in the children under this hierarchy are displayed in the right-side list.
  - When "Assets in Subfolders" is not checked, only the assets under the current node are displayed in the right-side list.

ServicePRO Add-on Feature Enhancements

The following new features are introduced in the product and these are available based on custom request(s). Please contact our ServicePRO Customer Support Representatives if you are interested in these add-on features.

*****Additional charges apply for enabling these features***

- **Customized Rating Survey** - A feature to facilitate rating of the Service Requests with Customized feedback questions has been implemented. While performing "Approval Rating" process, the requester will be prompted to answer additional questions, including the existing timeliness rating, quality rating and approval memo.
- **JAMES Chatbot** - Help Desk Technology has partnered with *Actionable Science* to incorporate their AI powered conversational Virtual Assistant called "James" in ServicePRO. James is a specialized IT Help desk virtual assistant that can provide instant support to your customers round the clock, increase usage of self-help tools and enhance SLA performances.
- **Integration with JIRA** - ServicePRO integrates with JIRA using the Zapier platform and ServicePRO JIRA Plug-in. Workflows introduced through this integration are as follows:
  i. Creation of a new JIRA issue when a ServicePRO request is placed in a specific queue.
  ii. Two-way memo updates syncing between ServicePRO request and JIRA Issue.
  iii. Closing of the corresponding ServicePRO request when a JIRA issue is closed
- **Best Solution Request for Publish, Review and Rating** - New feature to Review and Rate Best Solutions is introduced in ServicePRO and ServicePRO Web as a separate add-on. This feature allows privileged users, ends users, or both to rate and review published best solution articles. The feature to facilitate the Support reps to 'Request for Publish' a Best Solution has also been implemented in ServicePRO and ServicePRO Web as an add-on. This allows support reps to request a solution to be published by an Administrator in ServicePRO, which is the only role that can publish a draft solution.
  Another option, which separately tracks hits on a Solution by End users and Privileged users has been implemented as part of this add-on as well.
- **Attachments Extraction Utility -** A utility to extract and export all the attachments from ServicePRO is available.