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14.2.19.x

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ServicePRO Feature Enhancements

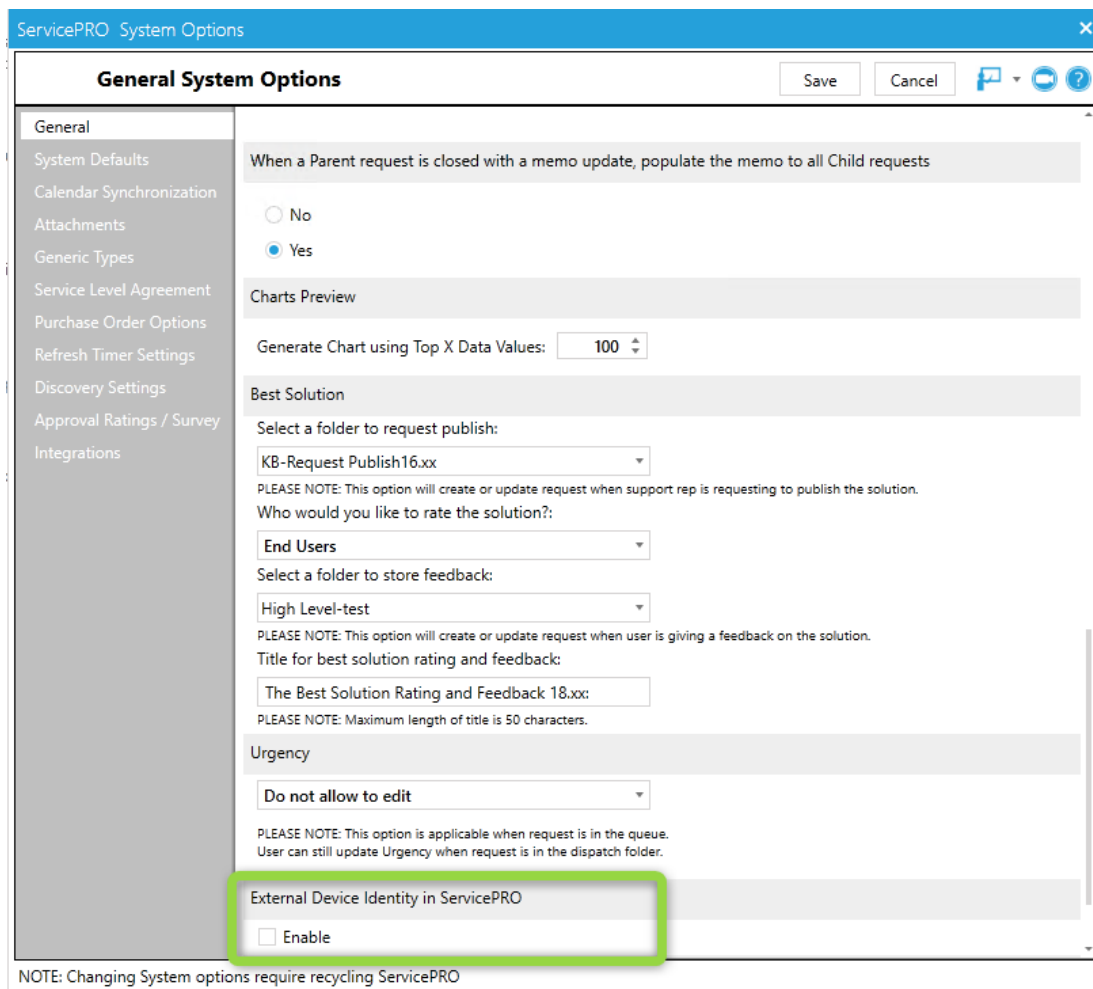
The following client-requested features have been implemented as of ServicePRO version 14.2.19.x.

1. Azure Active Directory Passthrough Authentication for ServicePRO outside of the Domain Network

ServicePRO now allows Active Directory Passthrough authentication when accessing the application outside the domain network, by validating and registering the external device using a one-time password.

This new feature of ServicePRO allows the privileged users to login to ServicePRO by means of passthrough authentication from outside of their domain network (e.g. from home computers/laptops).

ServicePRO Administrators can enable the feature 'External Device Identity in ServicePRO' from the System Options under the General tab.



The screenshot shows the 'ServicePRO System Options' window with the 'General System Options' tab selected. The 'External Device Identity in ServicePRO' option is highlighted with a green box and is currently set to 'Disable'.

ServicePRO System Options

General System Options [Save] [Cancel] [Help] [Refresh] [Search]

General

- System Defaults
- Calendar Synchronization
- Attachments
- Generic Types
- Service Level Agreement
- Purchase Order Options
- Refresh Timer Settings
- Discovery Settings
- Approval Ratings / Survey
- Integrations

When a Parent request is closed with a memo update, populate the memo to all Child requests

No
 Yes

Charts Preview

Generate Chart using Top X Data Values:

Best Solution

Select a folder to request publish:

PLEASE NOTE: This option will create or update request when support rep is requesting to publish the solution.

Who would you like to rate the solution?:

Select a folder to store feedback:

PLEASE NOTE: This option will create or update request when user is giving a feedback on the solution.

Title for best solution rating and feedback:

PLEASE NOTE: Maximum length of title is 50 characters.

Urgency

PLEASE NOTE: This option is applicable when request is in the queue.
User can still update Urgency when request is in the dispatch folder.

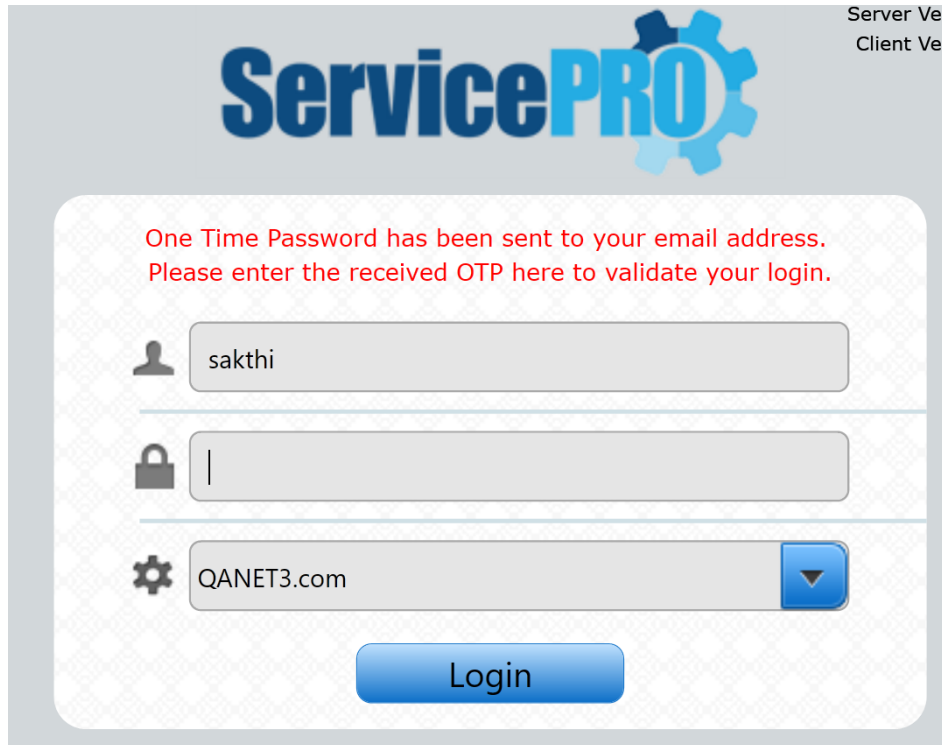
External Device Identity in ServicePRO

Enable

NOTE: Changing System options require recycling ServicePRO

If Active Directory Authentication is enabled for ServicePRO and if a privileged user has enabled the “Don’t Show ADS Login Screen” option in their User Options and the new System option ‘External Device Identity in ServicePRO’ is enabled in ServicePRO:

When the user tries to login to ServicePRO from a PC/Laptop outside of the domain network, an OTP (One-time password) is generated and sent to the user’s mailbox that is registered with the ServicePRO account.



The screenshot shows the ServicePRO login interface. At the top, the ServicePRO logo is displayed. Below the logo, there is a message in red text: "One Time Password has been sent to your email address. Please enter the received OTP here to validate your login." Below this message, there are three input fields: a username field containing "sakthi", a password field with a vertical bar indicating a password, and a domain field containing "QANET3.com" with a dropdown arrow. A blue "Login" button is positioned below the input fields. In the top right corner, there are labels for "Server Ver" and "Client Ver".

NOTE: User must enter the received OTP within 10 minutes to login into ServicePRO.

If the user tries to use the OTP after 10 minutes, a new OTP gets generated and sent to the user.

User has now successfully enabled Active Directory passthrough authentication for the current device.

From this point onwards, any time the user launches ServicePRO on the same device, the user will be automatically logged into ServicePRO without prompting for credentials.

2. Restrict Support rep Views in System Options

ServicePRO’s new feature for professional edition allows the ServicePRO Administrator to restrict some of the request listing views when support rep has one or more of the below roles:

- Update
- Data Analysis
- Data Analysis Designer.

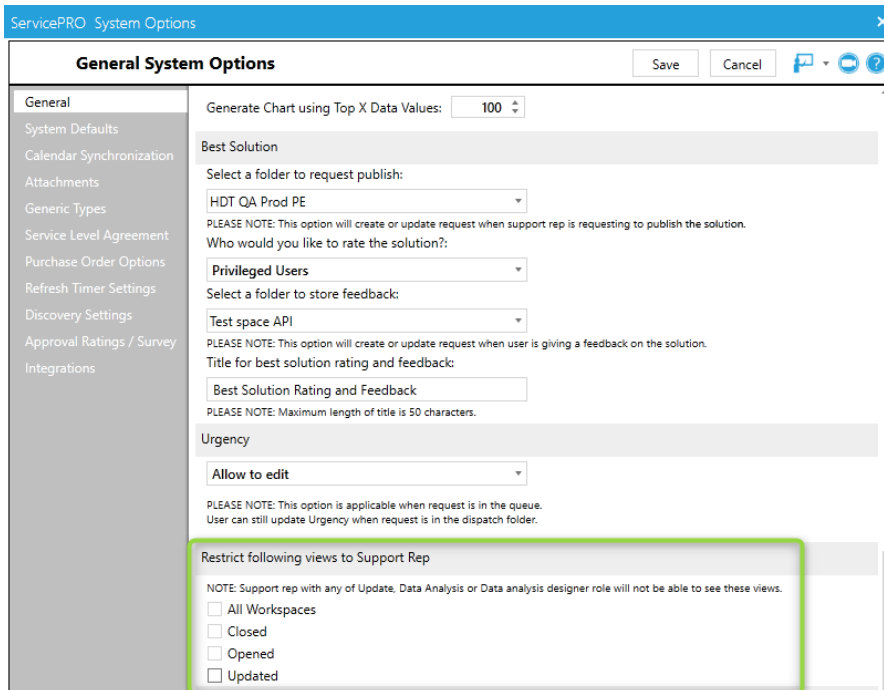
ServicePRO administration can enable this restriction from the settings available under the “General” section in System Options. This feature does not change the role access behavior, it only controls the Request views that are available for the Support Rep.

2.1. Configuration

In ServicePRO Professional Edition, the ServicePRO Administrator can select any of the checkboxes under “Restrict following views to Support Rep” option in the “General” section of System Options to restrict the following views for the Support rep users whom have at least one of the following roles: ‘Update’, ‘Data Analysis’ or ‘Data Analysis Designer’:

- All Workspaces
- Closed
- Opened
- Updated

By default, none of the checkboxes are checked.



When one or more of these checkboxes are checked by the ServicePRO administrator, the following scenarios will apply:

- If the checkbox for “All Workspaces” view is selected, then the Support Rep will not see the “All Workspaces” option under the ServicePRO backstage menu “Views” and will not see the “All Workspaces” option under the ServicePRO Web Navigation Menu “Service Requests”.
- If the checkbox for “Closed” view is selected, then the Support Rep will not see the “Closed” option in the ServicePRO backstage menu “Views”.
- If the checkbox for “Opened” view is selected, then the Support Rep will not see the “Opened” option in the ServicePRO backstage menu “Views”.
- If the checkbox for “Updated” view is selected, then the Support Rep will not see the “Updated” option in the ServicePRO backstage menu “Views”.

NOTE: The system option “Restrict following views to Support Rep” is not available in the ServicePRO Enterprise Edition.

3. Enhancements to Query Designer – Two additional criteria values for Memo Author field

Whenever the “Requester” of a service request makes any updates or changes to the request, an e-mail notification can be sent out by setting up a Business Rule.

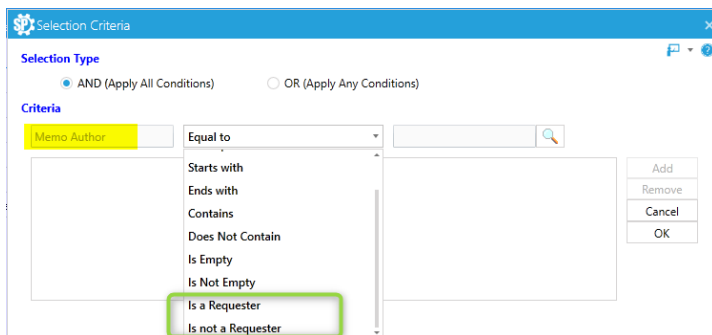
In Order to facilitate setting up criteria for filtering the memo updates done by the requester, two new criteria values ‘Is a Requester’ and ‘Is not a Requester’ are implemented for Memo Author field.

3.1. Enhancements to Memo Author Query Criteria

In the Query Designer selection criteria for “Memo Author” field, two new options have been added as shown in the below screenshot:

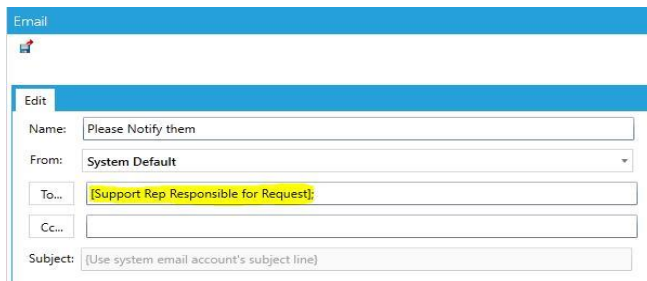
- Is a Requester
- Is not a Requester

When the “Memo Author” criteria is set to “Is a Requester”, the query will filter all the memos that are added by the Requester. When the “Memo Author” criteria is set to “Is not a Requester”, the query will filter all the memos that are not added by the Requester.



The implementation of the additional criteria values for the “Memo Author” field will allow setting up notifications through the business rules upon any updates being made by the requester user OR by the non-requester user.

3.1.1. Example to demonstrate the use of the new criteria values for “Memo Author” field



The screenshot shows an email configuration interface. At the top, there is a blue header with the word "Email" and a small icon. Below this is an "Edit" section with several input fields: "Name" (text box with "Please Notify them"), "From" (dropdown menu with "System Default"), "To..." (text box with "[Support Rep Responsible for Request]"), "Cc..." (text box), and "Subject" (text box with "[Use system email account's subject line]").

In a Business Rule,

- If in the Rule conditions, “**Is a Requester**” is selected in Memo Author selection criteria, and the ‘To’ field in the Email notification is selected with ‘Support Rep Responsible for Request’, then the “Responsibility” user will be notified through the business rule, whenever any updates are made by the requester.
- If in the Rule conditions, “**Is not a Requester**” is selected in Memo Author selection criteria, and the ‘To’ field in the Email notification is selected with ‘Support Rep Responsible for Request’, then the “Responsibility” user will be notified through the business rule, whenever any updates are made by any user other than the requester.

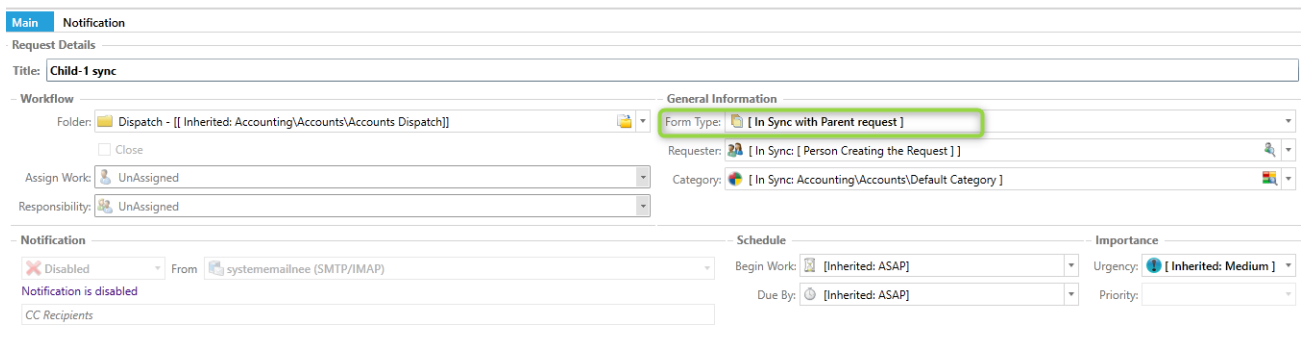
4. Child Request Form Type 'In Sync' with Parent request

ServicePRO facilitates updating the custom field values in the Child requests from the Parent request in the project, when the form type in the child request is set to be 'In sync with Parent request' in the Project template.

For example, if the form type in a particular child request in the Project template is set to be 'In sync with Parent request', whenever the user updates the value for a specific custom field in the Parent request, it automatically updates the respective custom field value in the child request as well.

NOTE: *In-Sync option only syncs the field values from the Parent request to the child request, not the other way around.*

Below Screenshot shows the option present in project template:



The screenshot displays the 'Request Details' form in ServicePRO. The 'Form Type' dropdown menu is highlighted with a green box and is currently set to '[In Sync with Parent request]'. Other visible fields include 'Folder' (Dispatch - [[Inherited: Accounting\Accounts\Accounts Dispatch]]), 'Requester' ([In Sync: [Person Creating the Request]]), 'Category' ([In Sync: Accounting\Accounts\Default Category]), 'Assign Work' (UnAssigned), 'Responsibility' (UnAssigned), 'Notification' (Disabled), 'Begin Work' ([Inherited: ASAP]), 'Due By' ([Inherited: ASAP]), and 'Importance' ([Inherited: Medium]).

5. Other Enhancements / Feature Implementations

- Assets Import Utility will no longer overwrite the Asset Allocation type field value as Inventory for the existing assets in both the following scenarios, irrespective of the Auto-Overwrite option chosen:
 - If the allocation type field is not mapped.
 - If the allocation type is mapped, but the value is empty in the mapping data file

- ServicePRO James Chatbot, which is a paid Add-on feature, is now integrated with Microsoft Teams.

6. 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’ for 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.