SERVICE**PRO**

November 2015
Feature Requests
Documentation
14.2.1.12

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ServicePRO Feature Requests

ServicePRO

The following client-requested features have been implemented as of ServicePRO 14.2.X.

1. Network Audit Engine/Auto Discovery

1.1. 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
    - For auditing non-Windows Machines (Linux, MAC) and the devices, the service uses SNMP (Simple Network Management Protocol) Discovery.

1.2. 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

1.3. 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

1.4. 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.

2. Query Designer & Business Rules

2.1. Ability to run a 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. <u>**After Current Date By**</u>
   - **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**:

   Criteria

   | Time Scheduled | After Current Date By ▼ | Days: | 5 ▼ |

   - 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. <u>**Before Current Date By**</u>
   - **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**:

   Criteria

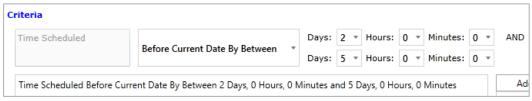 | Time Scheduled | Before Current Date By ▼ | Days: | 5 ▼ |

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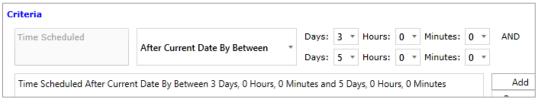
3. **Before Current Date By between**
   - **Values:** 'X' Days/hours/Minutes, and 'Y' Days/hours/Minutes
   - This criteria is met when the custom date/base date field value is **before the current date by a value ranging between** 'X' Days/hours/Minutes and 'Y' Days/hours/Minutes
   - **Example**:

Criteria			
Time Scheduled	Before Current Date By Between ▾	Days: 2 ▾ Hours: 0 ▾ Minutes: 0 ▾	AND
		Days: 5 ▾ Hours: 0 ▾ Minutes: 0 ▾	
Time Scheduled Before Current Date By Between 2 Days, 0 Hours, 0 Minutes and 5 Days, 0 Hours, 0 Minutes			Ad

   - 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:**

Criteria			
Time Scheduled	After Current Date By Between ▾	Days: 3 ▾ Hours: 0 ▾ Minutes: 0 ▾	AND
		Days: 5 ▾ Hours: 0 ▾ Minutes: 0 ▾	
Time Scheduled After Current Date By Between 3 Days, 0 Hours, 0 Minutes and 5 Days, 0 Hours, 0 Minutes			Add

   - 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.

2.2. 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.
     - **Field**: Custom Date Time Field or Base Date Time Field
     - **Condition**: Not Within Last
     - **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
     - **Field**: Custom Date Time Field or Base Date Time Field
     - **Condition**: Not Within Next
     - **Values**: 'X' Days/Hours/Minutes
   - **NOTES**:
     - This option is only available for all Custom Date Time fields, Time Due and Time Scheduled fields
     - 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
     - In the case of 'Time Statistics' fields, business hours will be taken into account while calculating 'X' Days/Hours/Minutes time.

3. Email Notifications

3.1. 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.

4. Charts

4.1. 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.

4.2. 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.

5. Reports

5.1. 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.
    - o The range of reports generated can filtered by alphabetical range.

Cloud9

The following client-requested features for Cloud9 have been implemented as of ServicePRO 14.2.X.

6. Cloud9 – Login

6.1. Allowing multiple logins at the same time for end users

- End Users are allowed to open multiple sessions of Cloud9.
- Support Rep Users will be restricted to only one session of Cloud9 login at a time.

7. Cloud9 – Login Page

7.1. Login Page Customization – Welcome Screen Text

- Users can now customize the Welcome screen, under Portal Designer > General > Theme. The following text can be edited:
  - Login Page LHS (Left Hand Side) Panel
  - Login Page Welcome Message (top right header above Login area)

8. Cloud9 – Language Support

8.1. German language support

- A German translation of the Cloud9 portal is now supported, alongside English French, Spanish and Slovenian. Users can select German language options from the upper right corner of the login interface.

9. Cloud9 – Home Page and Widgets

9.1. Home Page Customization – Pick and choose widgets to show

- Administrator users can customize which widgets can be shown or hidden on the Home Page from the Portal Designer.
  - Changes can be made to both the End User and Licensed User separately, under the respective Home Page Widgets tabs.
  - Widgets can be rearranged in different positions on the Home Page.

9.2. Service Catalog Widget

- Users can browse for available services and initiate them from the new Service Catalog Widget on the Home Page.
  - Available service request types include:
    - Generic Service Requests
    - Generic Purchase request
    - Custom Request types
    - Quick Request Templates
    - Project Request Templates
  - Administrators can customize the availability of service types from the Portal Designer.

10. Cloud9 – Request Management

10.1. Project Requests – Creation/Update

- Users can now create Project Requests in the New Request Wizard, under Service Type field in the Main Properties tab.
  - o Users can also create Project Requests from the newly implemented Service Catalog Widget on the Home Page.

10.2. Quick Requests – Submit button availability at all times

- While submitting Quick Requests, the Submit request button will be available on each step of the request wizard at all times.

10.3. Service Requests – Options for creating best solutions when a privileged user closes a request

- When privileged users close requests in Cloud9, they can also choose to create a Best Solution for the resolution of the request.
  - o Icons for creating solutions "From this Request" and a general "New Solution" icon are available in the ribbon toolbar, under the Create Solution section.

10.4. Service Request Views – Using and searching for email addresses in Send Email

- Users can now search and select email addresses to send emails from when using Send Email options. Entering a text string will begin searching for email addresses in the database.

11. Cloud9 – Best Solutions and Knowledge Base Articles

11.1. Create New / Update Best Solutions (For Privileged Users)

- Privileged Users are now able to Create and Update Best Solutions articles
  - o New articles can be created by selecting Best Solution > New Solution from the side bar.