



September 2023
Feature Requests

Documentation

14.2.21.x

Table of Contents

ServicePRO Feature Enhancements.....	2
1. Encrypt Attachments for Team(s).....	2
1.1. Encrypt Attachment(s) - 'Find Team' option to encrypt the attachments for Teams	2
1.2. Edit Team – “Re-synch Team Encryption” option for the newly added member(s)	4
1.3. Edit Team – Automatic Removal of users from encrypted file, when a team member is removed from a team	4
1.4. Delete Team – Automatic Removal of team from the encrypted file(s)	5
2. Rule Design – Workflow - Unchanged Option in Assign Work field	5
3. Function Field in Queries / Filters in Charts, Reports / Conditions in Business Rules	5
3.1. Limitation	6
3.2. Function fields in Query designer, Charts, Custom Reports and Business Rules.....	6
4. OAuth 2.0 for Gmail in System Email Accounts and User Email Accounts	6
4.1. Pre-requisite Settings to use OAuth 2.0 Authentication for Gmail	7
4.2. Enhancements to System Email Account Settings.....	7
4.3. Enhancements to User Email Server Setting	8
5. Other Enhancements / Feature Implementations.....	8
6. ServicePRO Add-on Feature Enhancements	8

ServicePRO Feature Enhancements

The following client-requested features have been implemented as of ServicePRO 14.2.21.x version.

1. Encrypt Attachments for Team(s)

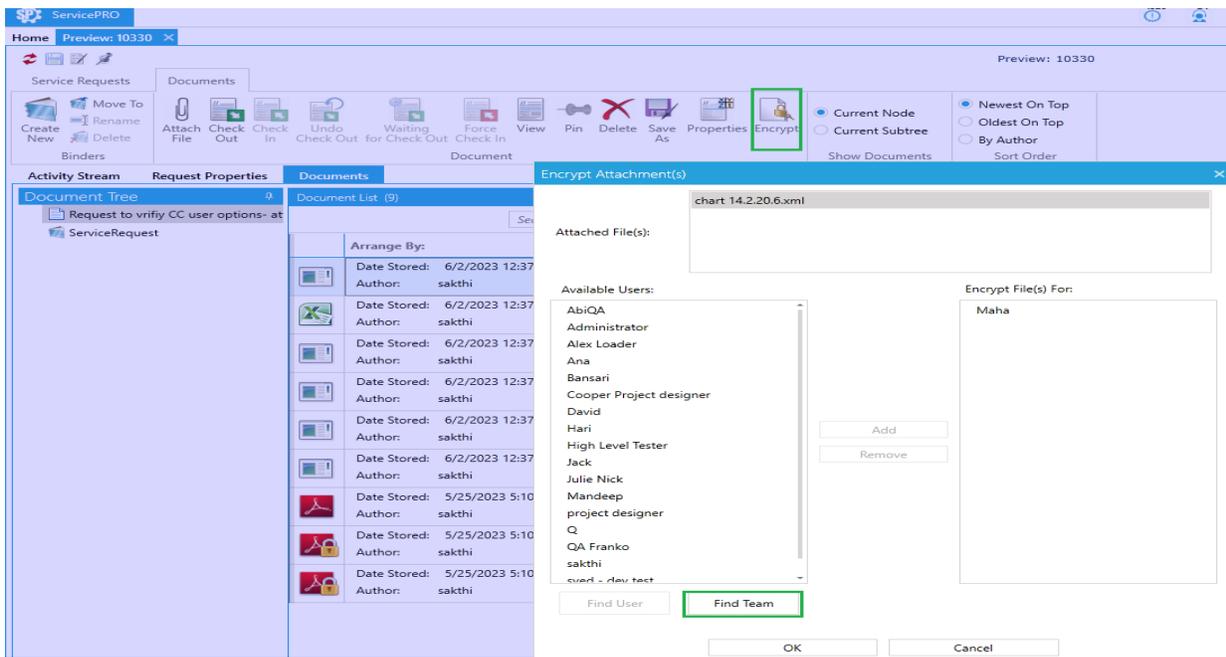
ServicePRO facilitates encrypting the Attachments for Team(s), in addition to encrypting for specific users.

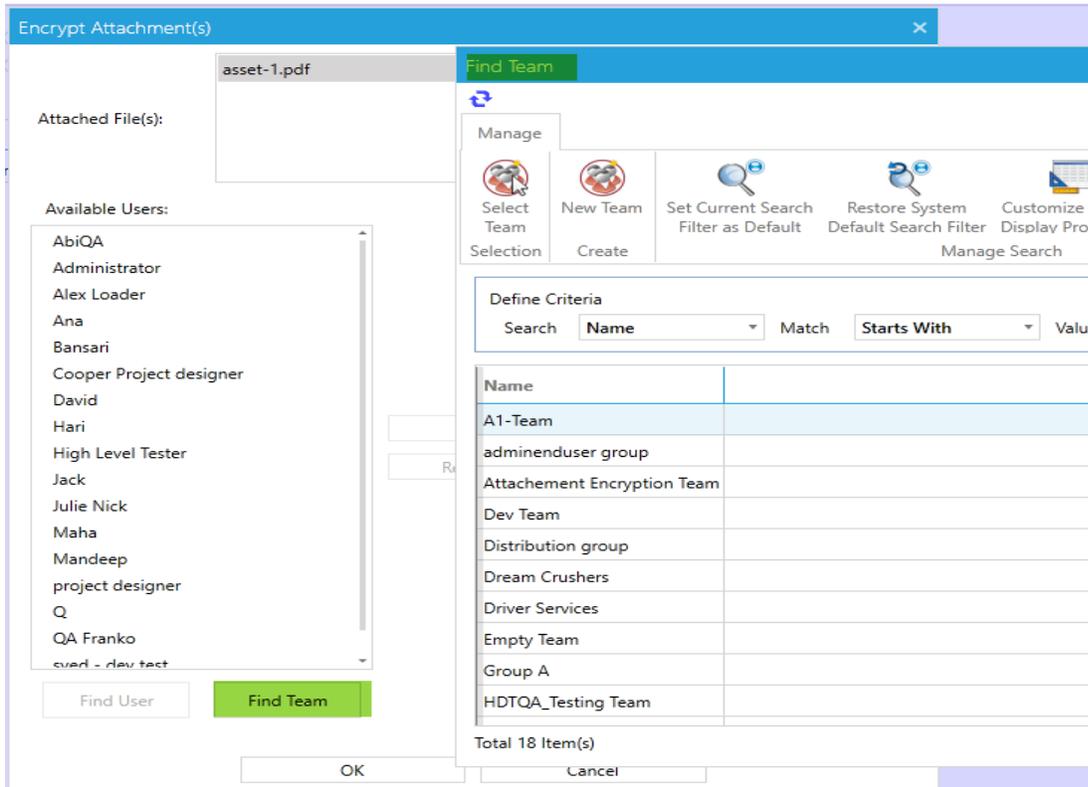
Users attaching the documents can encrypt the attachment for specific teams. Also, when the administrator edits a team to add a new user to the team or to remove a user from the team, the encryption for the documents that are associated to this team can be synchronized.

It is required to have passphrase set for all the members of the team that is selected for attachment encryption. If any team member does not have a passphrase set, that member will be excluded from accessing the encrypted attachment.

1.1. Encrypt Attachment(s) - 'Find Team' option to encrypt the attachments for Teams

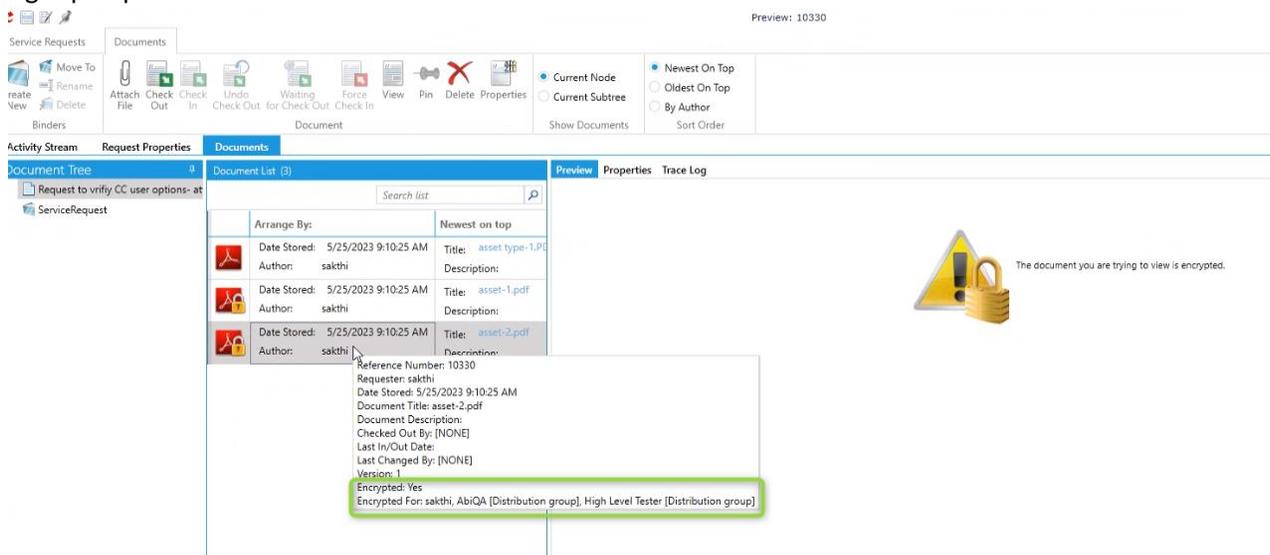
In the Encrypt attachment screen, the "Find Team" option has been introduced beside the "Find User" option, which allows to choose a team that you want to encrypt the attachment for. On choosing the team, all current members of the team will be added for encrypting the attachment.





Note: Only the attachment owner can add new users / teams or remove existing users/teams from the “Encrypt File(s) for” list.

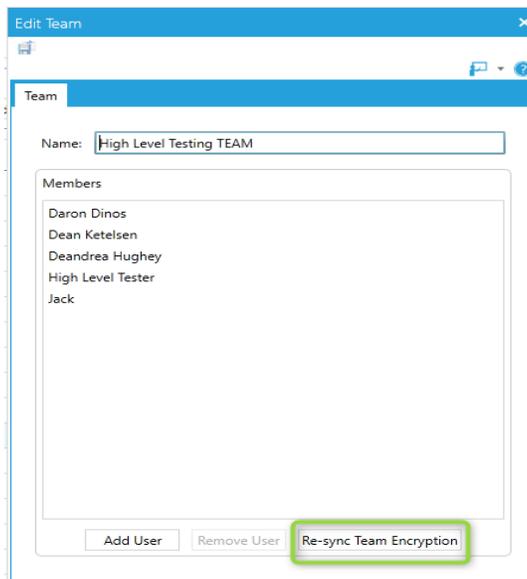
When the user hovers over an Encrypted attachment that is encrypted for one or more teams, followed by “Encrypted For:”, it will list all the users who are members of these teams, along with the team name in the bracket. The files that are encrypted for a team can be decrypted by the team members with the right passphrase.



1.2. Edit Team – “Re-sync Team Encryption” option for the newly added member(s)

In the Edit Team screen, when a new member is added to an existing team, and if any attachment has been encrypted for this team, then the “Re-sync Team Encryption” button will be enabled. If the administrator clicks on the “Re-sync Team Encryption” button, all the attachments that are encrypted for this team will be encrypted for the newly added team member, after validating the passphrase for the current user.

Note: “Re-sync Team Encryption” button will be enabled only for users with ServicePRO Administrator role and also, designated as a trustee in Encryption Settings.



1.3. Edit Team – Automatic Removal of users from encrypted file, when a team member is removed from a team

In the Edit Team screen, when a user is removed from an existing team, and if any attachment has been encrypted for this team, while saving the team, the removed user will be automatically removed from the encrypted attachment. If the user had been directly added to the encryption list, then that user will still be able to access the encrypted attachment.

Note: It is **not** required to click on “Re-sync Team Encryption” button, while removing a member from the team as it will be taken care of automatically when the team is saved.

1.4. Delete Team – Automatic Removal of team from the encrypted file(s)

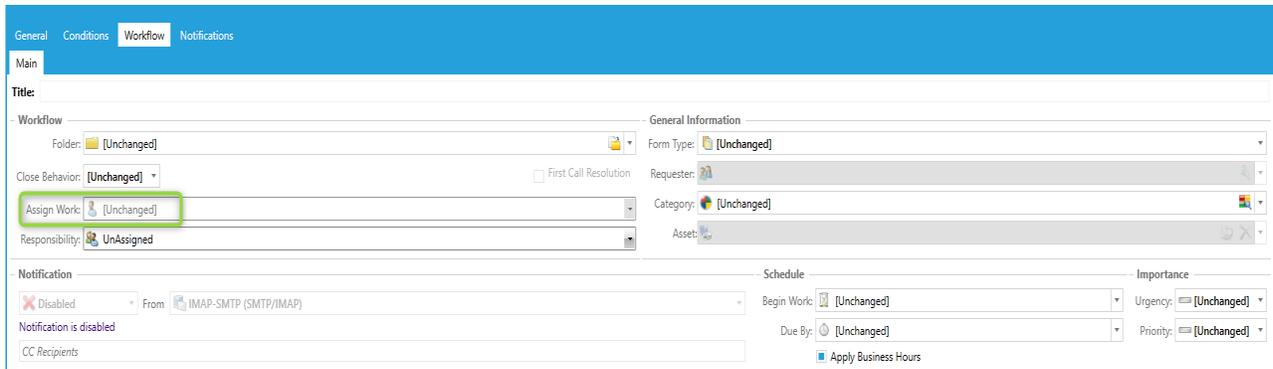
When a team is deleted and saved, and if any attachment had been encrypted for this team earlier, then the team (and hence its member users) will be removed from the encrypted attachments, that were encrypted for this team.

2. Rule Design – Workflow - Unchanged Option in Assign Work field

In the Business Rules designer and Email Rules designer, for the “Assign Work” field on the Workflow tab, a new option “Unchanged” has been added.

While creating a new Business rule or a new Email Rule, the new “Unchanged” option will be selected by default in the Assign Work field.

If the option “Unchanged” is selected in the ‘Assign Work’ field, in a Business rule/Email rule and when the rule runs, if the rule conditions apply to a request, the “Assign work” workflow for that request will not be changed.



The screenshot shows the Business Rules designer interface with the Workflow tab selected. The 'Assign Work' field is highlighted with a green box, and its value is '[Unchanged]'. Other fields include 'Folder', 'Close Behavior', 'Responsibility', 'Form Type', 'Requester', 'Category', 'Asset', 'Schedule', and 'Importance'.

3. Function Field in Queries / Filters in Charts, Reports / Conditions in Business Rules

ServicePRO provides the ability to include the Function fields in Custom Forms, from the query designer/Filters/Conditions tab in the following Modules.

- Queries
- Charts

- Custom reports
- Business Rules

While creating a query in query designer or setting filters in Custom Reports or Charts or setting conditions in Business Rules, the user can now add the function fields in Custom forms,

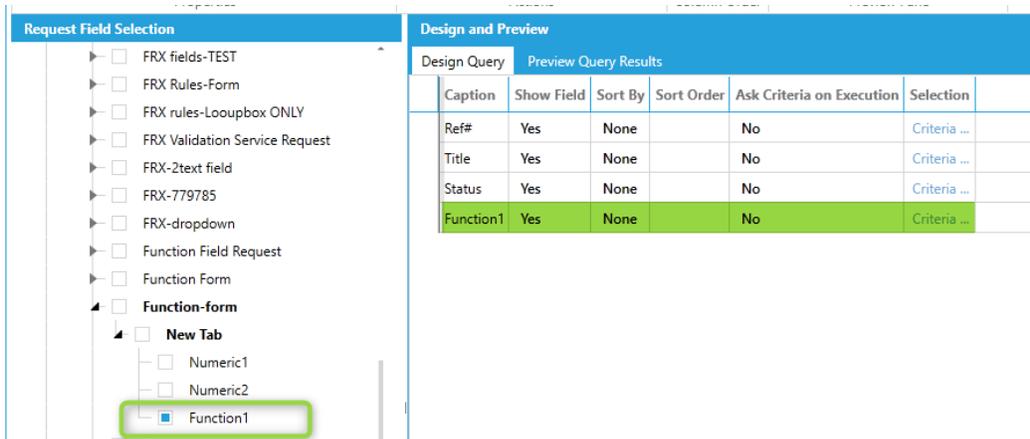
- To fetch and show the calculated data/values from the function fields.
- To set criteria on the function fields

3.1. Limitation

This feature will work only with the service requests that are created from ServicePRO version 14.2.21.x and above. Querying using the Function field will not work with the data from previous versions.

3.2. Function fields in Query designer, Charts, Custom Reports and Business Rules

- Functions fields within custom form is available to pull into query and for setting the criteria.
- Allows the user to select a function field while designing queries in Query Designer, while setting filters in charts and custom reports, and while setting conditions in Business Rules.



A.

4. OAuth 2.0 for Gmail in System Email Accounts and User Email Accounts

ServicePRO facilitates OAUTH 2.0 Authentication for Gmail Accounts, with System email account settings and User Mail Account settings.

By default, when “POP or IMAP” configuration is selected either in System Email Account Setting or User Email Server Setting, the “Authentication Kind” will be set to “Basic”, and the Basic authentication will continue to work as before. You now have the option to choose OAUTH 2.0 in the “Authentication Kind” field.

4.1. Pre-requisite Settings to use OAuth 2.0 Authentication for Gmail

In order to enable the OAUTH 2.0 Authentication kind for Gmail, the following are the steps to be followed to create Service account and generate the key and authorize Client ID for the Service account. Without these settings this feature cannot be utilized.

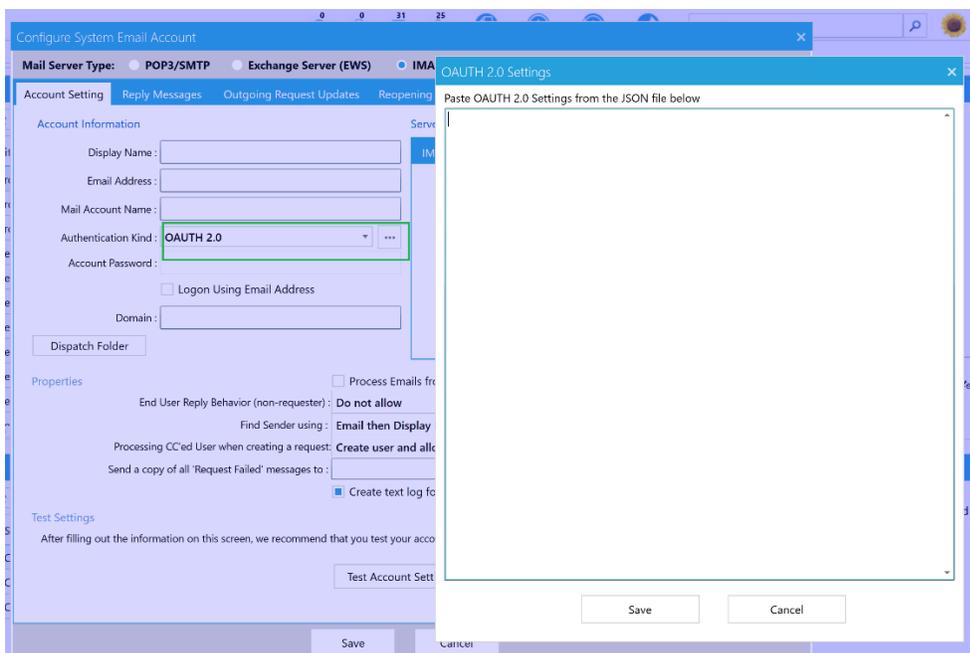
Check the document available at the following ServicePRO Wiki section: [Setting up OAuth 2.0 in Gmail](#) and follow the steps given to set Gmail for OAUTH 2.0. Please take note of the Service account email address from Step 3.4 in the document, and the Json key from Step 3.8 in the document and keep them ready for configuring the System email account and User email account in ServicePRO.

Note: None of the above settings are required for 'Basic' authentication.

4.2. Enhancements to System Email Account Settings

When "POP3/SMTP or IMAP/SMTP" server type is selected in the Account Setting section, a new field " Authentication Kind" shows up. This field has two options to choose from "Basic" and "OAUTH 2.0". By default, "Basic" Authentication Kind is selected.

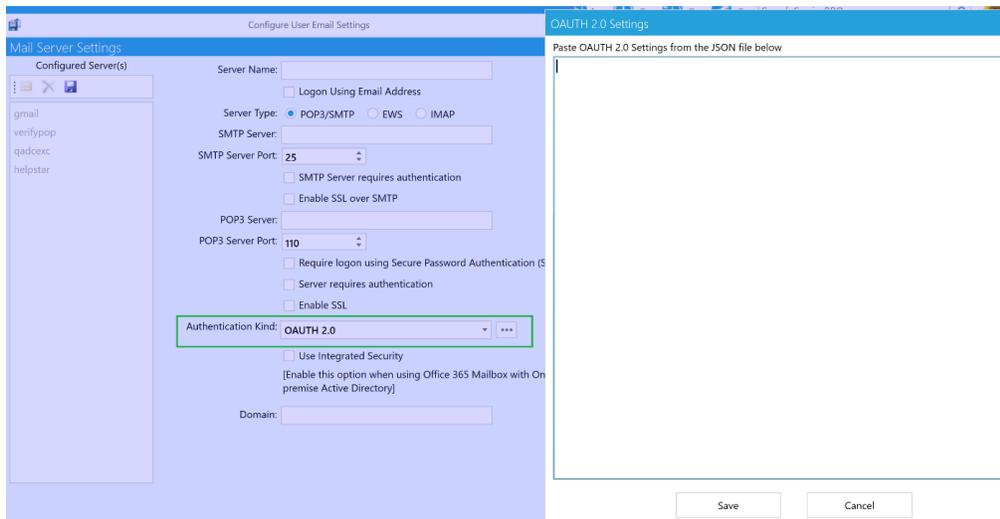
When 'OAuth 2.0' is selected for Authentication Kind, please make sure to click on the ellipsis button next to the field and enter the JSON private key that was downloaded for the Gmail Service account (Step 3.8 in the Gmail OAuth 2.0 setup document) in the dialog that opens up. In the Email Address field, please make sure to enter the Service Account email address that was created in step 3.4 in the Gmail OAuth 2.0 setup document. ServicePRO and Starwatch Service will access this mailbox using the OAuth 2.0 authentication.



4.3. Enhancements to User Email Server Setting

In the User Email Server Setting, when "POP3/SMTP or IMAP" server type is selected, a new field "Authentication Kind" shows up. This field has two options to choose from "Basic" and "OAUTH 2.0". By default, "Basic" Authentication Kind is selected.

When 'OAuth 2.0' is selected for Authentication Kind, please make sure to click on the ellipsis button next to the field and enter the JSON private key that was downloaded for the Gmail Service account (Step 3.8 in the Gmail OAuth 2.0 setup document) in the dialog that opens up. Once the user email server setting is configured using OAuth 2.0, ServicePRO accesses the user's mailboxes using the OAuth 2.0 authentication method.



5. Other Enhancements / Feature Implementations

- Active Directory User Import process in the Starwatch Service has been optimized to run faster.
- Integration with JIRA, which is a paid Add-on feature, is now enhanced to support 'EPIC' Issue type.
- Attachment export utility, which is a paid Add-On, is now enhanced to provide the reason for the skipped attachment files.

6. ServicePRO Add-on Feature Enhancements

The following features in the product 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.

Note: In the 14.2.21.x maintenance release, JIRA integration has been enhanced to support ‘EPIC’ issue type.
- **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.
 - *In the 14.2.21.x maintenance release, Attachment export utility has been enhanced to provide the reason for the skipped attachment files.*