

SERVICEPRO

August 2014

Release Notes

Version 14.0.72.6

NOTICES

ServicePRO Release Notes

August 2014

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- Call us at: 1-800-563-4357, Option 3 for Technical Support

Table of Contents

1.	New Features and Improvements	1
1.1.	Introducing the ServicePRO® WorkBench	1
	Announcements.....	2
	Messages.....	3
	My Workspace	4
	My Documents.....	5
	My Calendar	6
	Email Inbox.....	7
	ServicePRO	8
	Service Request.....	9
	Quick Request	10
	Purchase Request.....	11
	Project Request.....	12
	Recent Requests.....	13
	Recent Documents.....	14
	My Views.....	15
	Action Items	16
	Find.....	17
	Knowledge Base.....	18
	Training Center.....	19
	Chat	20
	Setup/Administration	21
	Data Analysis.....	22
	Header Modules.....	23
1.2.	Training Center.....	26
	What is the Training Center?	26
	Manage Training Center Privileges	26
	How to access Training Center in ServicePRO	26
	Training Center Main Screen	27
	Creating new Training Module from the Training Center.....	28
	Training Category.....	29
	Title	29

Description	29
Screen Name	29
“Object Name”	29
Keywords.....	30
Tool Tip.....	32
Destination URL	32
Content Type.....	33
View Training Modules	34
Adding and Editing Training Modules	35
Updating and Deactivating Training Modules	37
Deleting and Re-activating Training Modules.....	38
Searching in Training Modules.....	40
2. Service Requests Import Utility (Open Source)	41
Import Utility Overview	41
What is the Service Requests Import Utility?	41
Pre-requisites, Scope and Limitations of Service Requests Import Utility	41
Fields Mappings for CSV file Data	43
How to access the ServicePRO Import Utility	44
Technical Pre-requisites.....	44
Detailed Steps to Configure, Build and Run the Utility.....	44
User Interface Overview	45
3. Module Bug Fixes	47
Service Requests, Project Requests, Quick Requests, Workspace & other Views.....	47
Email Inbox.....	47
ServicePRO Objects.....	47
Administration / Configuration.....	47
Assets/Configuration	47
Purchasing.....	47
AD Authentication.....	48
Query Designer	48
Reports, Charts, Dashboard	48
Object Designer / Custom Fields Editor	48
Quick Request Templates	48

Rule Designer & Rule Service	48
Starwatch Service.....	48
Import Utility.....	48
Others [Application Level].....	48

1. New Features and Improvements

1.1. Introducing the ServicePRO® WorkBench

A key new feature to ServicePRO is the ServicePRO Workbench.



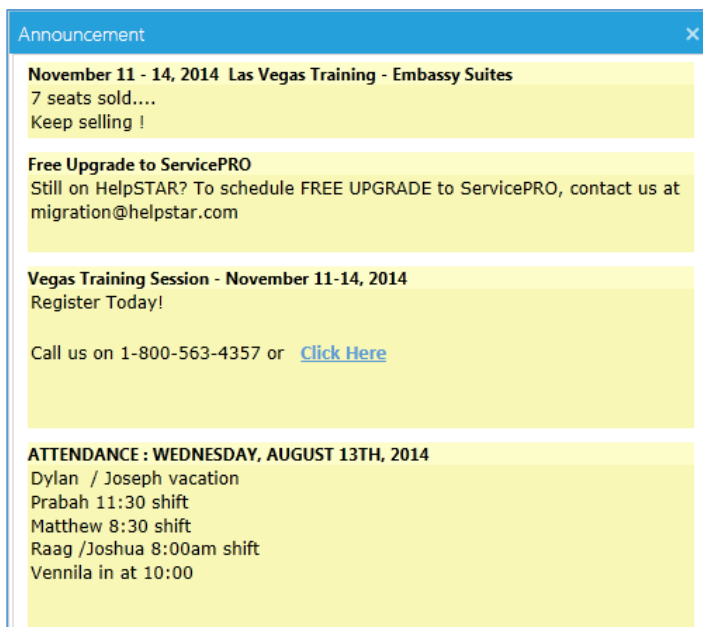
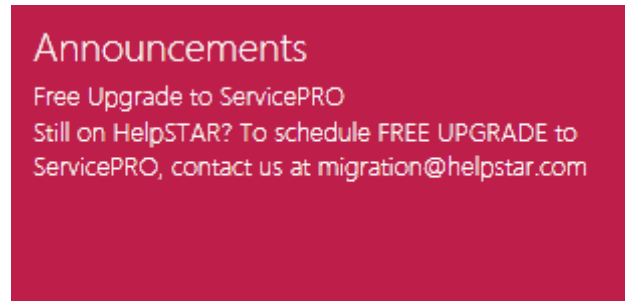
Why Workbench? We call it ‘Workbench’, because it provides a convenient access to the tools you need to manage your service desk, and your work day. The WorkBench comprises numerous apps, views, search tools, tutorials and navigational aids.

The following is a list of all modules in ServicePRO, with a description of the window that opens.

Announcements

In this tile you will see all active announcements at a glance, and it will cycle through the current announcements. Clicking on the tile will open the Announcements pop-up to view the Announcements in a list.

The option to Manage Announcements (Add New, Update and Delete) is now available under the “Set-up Administration” module.



Messages

In this tile you will see Quick Messages which are sent to you. Quick messages are instant conversations among users which creates a dialog thread within a request. All active quick messages will cycle through this tile. Clicking on the tile will open a new tab with the list of all quick messages.


Messages


Subject : setting font/color/size for all the users
And what is the default setting he would like to use?


Sender: Vennila Rajes


ServicePRO Workbench My Workspace - Sandeep Soni Update Service Request: 639268 ServicePRO Messages Preview: 648760


Home Message Actions



Request Detail
Update


Snooze


Clear







Reply to Sender


Post to Participants


Message Thread
View

Emails & Communications List (12)

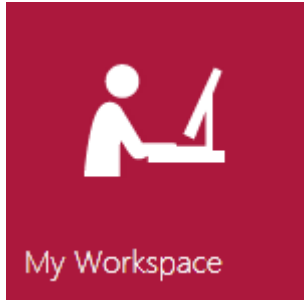
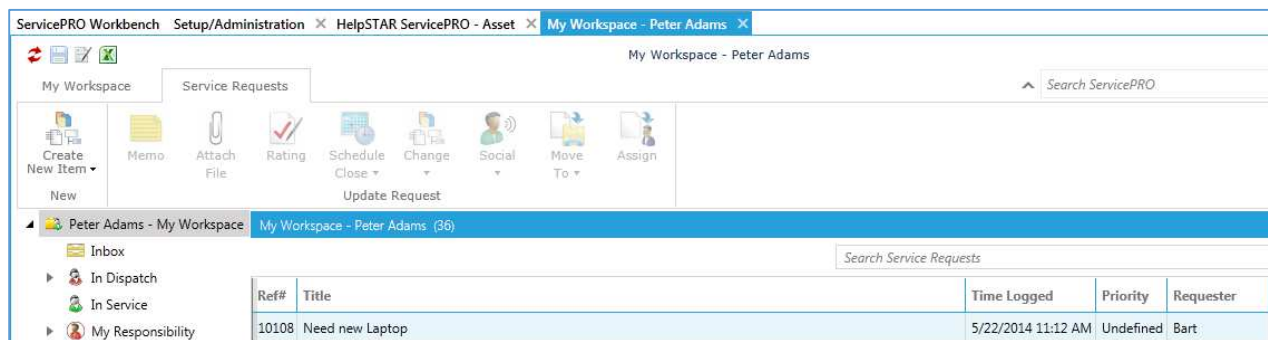
Search Emails, Communications

	Arrange By: Time Sent	Newest on top
	Sender: Michelle Lockey Ref#: 644945 Create Captivate Video - "Dashboard" Sandeep Soni	Thread: Dashboard video Priority: High Time Sent: 2014-08-14 11:27:44 AM
	Sender: Michelle Lockey Ref#: 643474 Create Captivate Video - "Charts" Sandeep Soni	Thread: Charts Video Priority: High Time Sent: 2014-08-13 4:43:04 PM
	Sender: Leah Bales Ref#: 634734 CCR - Feature Requests from NHS Mathew Burt	Thread: BUG NHS Priority: Critical Time Sent: 2014-08-12 9:08:17 AM
	Sender: Joseph Thomas Ref#: 640970 Vegas Seat Sale Process Documentation Sandeep Soni	Thread: Vegas Training documentation Review Priority: Medium Time Sent: 2014-08-04 3:00:55 PM
	Sender: Joseph Thomas Ref#: 641188 Check-up Process Documentation Sandeep Soni	Thread: Checkup documentation review Priority: Low Time Sent: 2014-08-04 3:00:04 PM

My Workspace

Clicking on this tile will open a new tab with the workspace view. My Workspace View is your dynamic viewport for work that is assigned to you. It will display a listing of all open requests contained in the folders that you have permission on. At a glance, you can view:

- Requests and tasks that have come into your personal inbox, or folders that are shared with other team members
- Requests that you are actively working on
- Requests that you manage or are responsible for

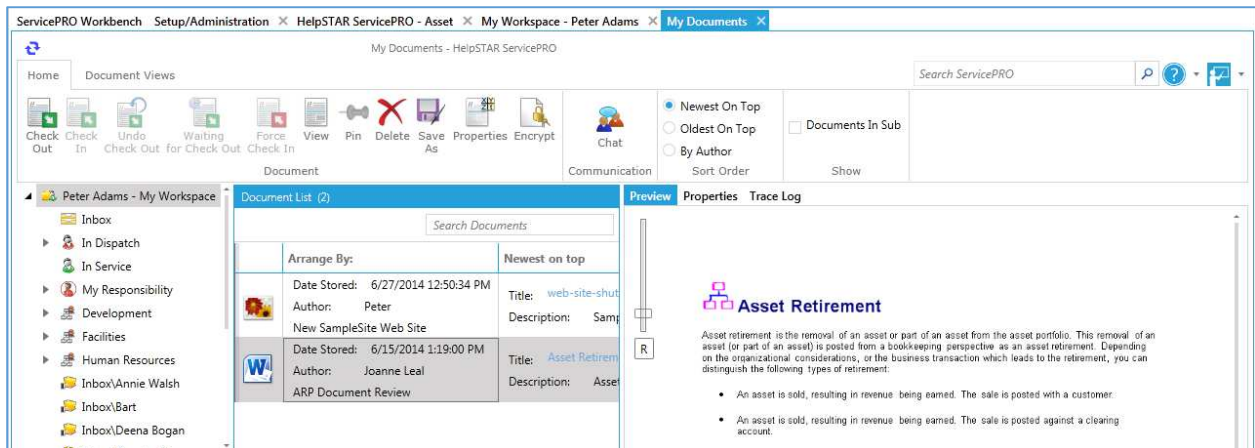
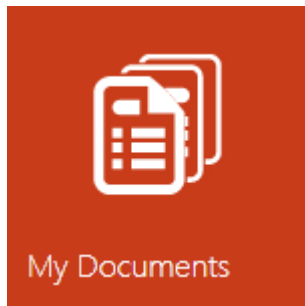
Ref#	Title	Time Logged	Priority	Requester
10108	Need new Laptop	5/22/2014 11:12 AM	Undefined	Bart

My Documents

Clicking on this tile will open a new tab with document management module. From this module, not only can you view the documents attached to requests in your Workspace, but also those attached to the assets you manage.

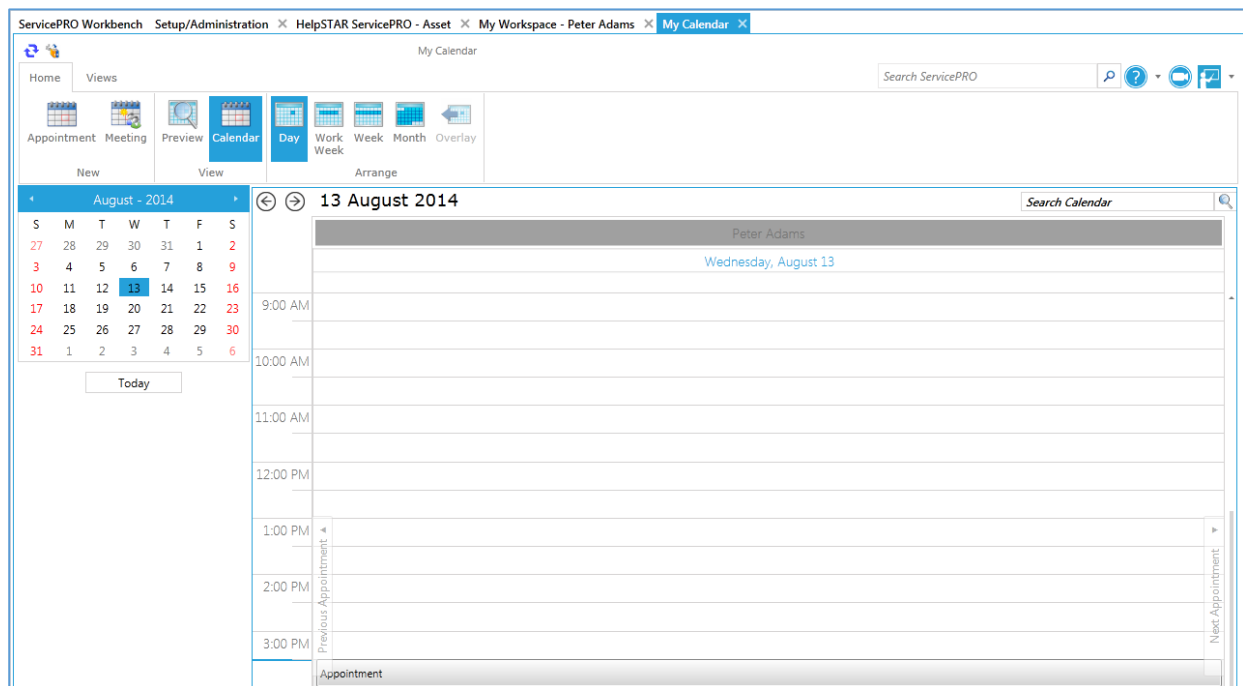
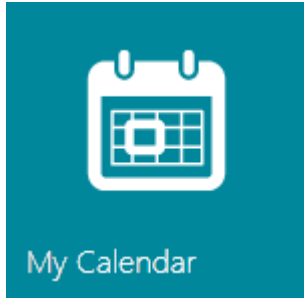
You can also check out documents, view and modify them. You can check properties to see who created the document and when, which request it is attached to. The Trace Log will show who checked out the attachment, when, and what was done to it.

For extra protection, documents can be encrypted so that only individuals or groups who have been explicitly authorized to access the document can do so.



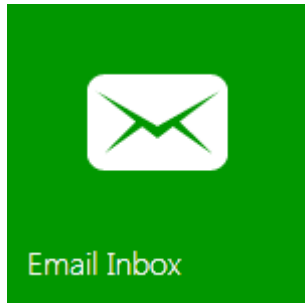
My Calendar

Clicking on this tile will open ServicePRO Calendar module. You can create meetings and appointments and link them to Service Requests. You can also configure your calendar to send notifications of upcoming events.



Email Inbox

Clicking on this tile will open ServicePRO email inbox which can be synchronized with your outlook or any other email client that is being used by the organization. The Email Inbox allows users in ServicePRO to create or update service or purchase requests by using email messages that are available in their local email accounts.



ServicePRO Workbench ServicePRO Messages My Workspace - Douglas Chow Update Service Request: 641780* Email Inbox

Email Inbox (dchow@helpstar.com)

Search ServicePRO

Douglas Chow (dchow@helpstar.com) Account Settings Options

Search Email Inbox

Sandeep Soni	8/13/2014 2:55 PM
Training Centre 1f	
Vennila Rajes	8/13/2014 1:44 PM
RE: 14.0.72.6 ServicePRO...	
Vennila Rajes	8/13/2014 12:51 PM
14.0.72.6 ServicePRO...	
Sandeep Soni	8/12/2014 4:39 PM
Training Centre 1c	
Adobe MAX	8/12/2014 4:04 PM
Learn from the experts	
Adobe MAX	8/12/2014 2:59 PM
Learn from the experts	
Mansee Mongia	8/12/2014 2:03 PM
RE: Reviewed the...	
Mansee Mongia	8/12/2014 1:55 PM
RE: Reviewed the...	
Mansee Mongia	8/12/2014 10:18 AM
Reviewed the document	
Mansee Mongia	8/11/2014 8:43 AM
RE: Training Centre...	
Vennila Rajes	8/8/2014 12:45 PM
RE: 14.0.72.3 Build...	
Vennila Rajes	8/8/2014 11:40 AM
14.0.72.3 Build (August...	
Gagan Deep	8/7/2014 2:05 PM
Hope you all enjoyed the...	
Sandeep Soni	8/7/2014 12:36 PM
Canceled: Vegas Training...	
Kawaljot Kaur	8/7/2014 10:44 AM
RE: can i get script for...	
Kawaljot Kaur	8/7/2014 10:41 AM
RE: can i get script for...	
Kawaljot Kaur	8/7/2014 10:40 AM
can i get script for charts	

Total 1792 items

Preview

Subject: RE: 14.0.72.6 ServicePRO (August Release build) - Posting in Live
 From: Vennila Rajes <vrajes@helpstar.com>
 To: All HelpSTAR Employee <all@helpstar.com>
 Sent: 8/13/2014 1:44:05 PM

Posted. Please log back into ServicePRO
 [If you hadn't logged out earlier, please log out & log back in]

If you encounter any issues, please check with Bart or me.

Thanks & Regards,
 Vennila

From: Vennila Rajes
Sent: Wednesday, August 13, 2014 12:51 PM
To: All HelpSTAR Employee
Subject: 14.0.72.6 ServicePRO (August Release build) - Posting in Live

Hi All,

Please be informed that we are posting 14.0.72.6 Production Release build in Live today at **1.30 pm today**.

The posting will take about 10 minutes.
 Please kindly log out of ServicePRO by 1.30 pm & log back in after receiving the confirmation email on posting from me.

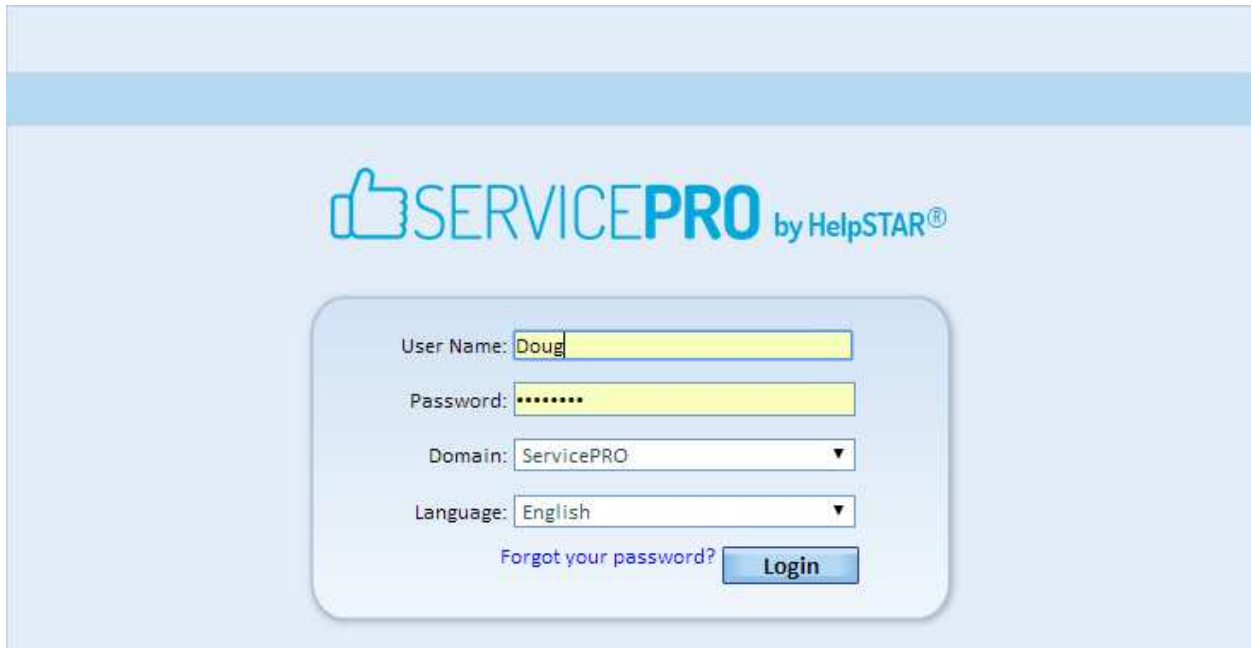
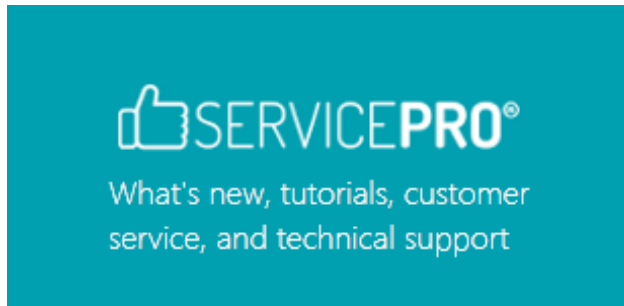
[This build includes some important fixes for the bugs that were noticed after the 14.0.72.3 posting in live]

Thanks & Regards,
 Vennila Rajes
 Development Manager | Help Desk Technology Corporation
 T: 905-829-3405 Ext. 287 | F: 905-829-4156
 E: vrajes@helpstar.com | Website www.helpstar.com

ServicePRO
 "If it's not PRO, just what kind of service is it?"
[For information on our upcoming Vegas Training, Click Here](#)

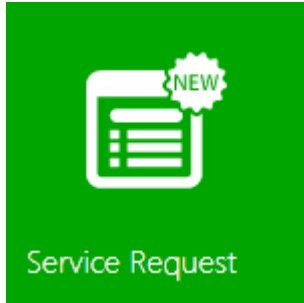
ServicePRO

This tile opens support portal for our clients: <http://enduser.helpstar.com>

A screenshot of the ServicePRO login page. At the top, it displays the 'SERVICEPRO by HelpSTAR®' logo. Below the logo is a login form with the following fields: 'User Name:' with the text 'Doug' entered; 'Password:' with a masked password of seven dots; 'Domain:' with a dropdown menu showing 'ServicePRO'; and 'Language:' with a dropdown menu showing 'English'. Below the form, there is a link for 'Forgot your password?' and a blue 'Login' button.

Service Request

This tile will open a new tab to create a new service request.



ServicePRO Workbench ServicePRO Messages My Workspace - Douglas Chow Update Service Request: 641780* Email Inbox New Service Request

New Service Request

Home Search ServicePRO

Save Delete Attach File Schedule Close Quick Message Requester Details Requester History Contact History

Main [Tech Support] Custom Fields

Title:

General Information

Type: Tech Support

Requester: Douglas Chow

Category:

Asset:

Workflow

Folder: Dispatch - [Tech Support,Tech Dispatch]

Close First Call Resolution

Assign Work: UnAssigned

Responsibility: UnAssigned

Notification

Disabled From HelpSTAR Technical Support (Exchange)

Notification is disabled

CC Recipients

Schedule

Begin Work: ASAP

Due By: ASAP

Importance

Urgency: Medium

Priority:

Memo

Time Worked: 0 minute on Wed, 13-Aug-2014

Time Code: 1

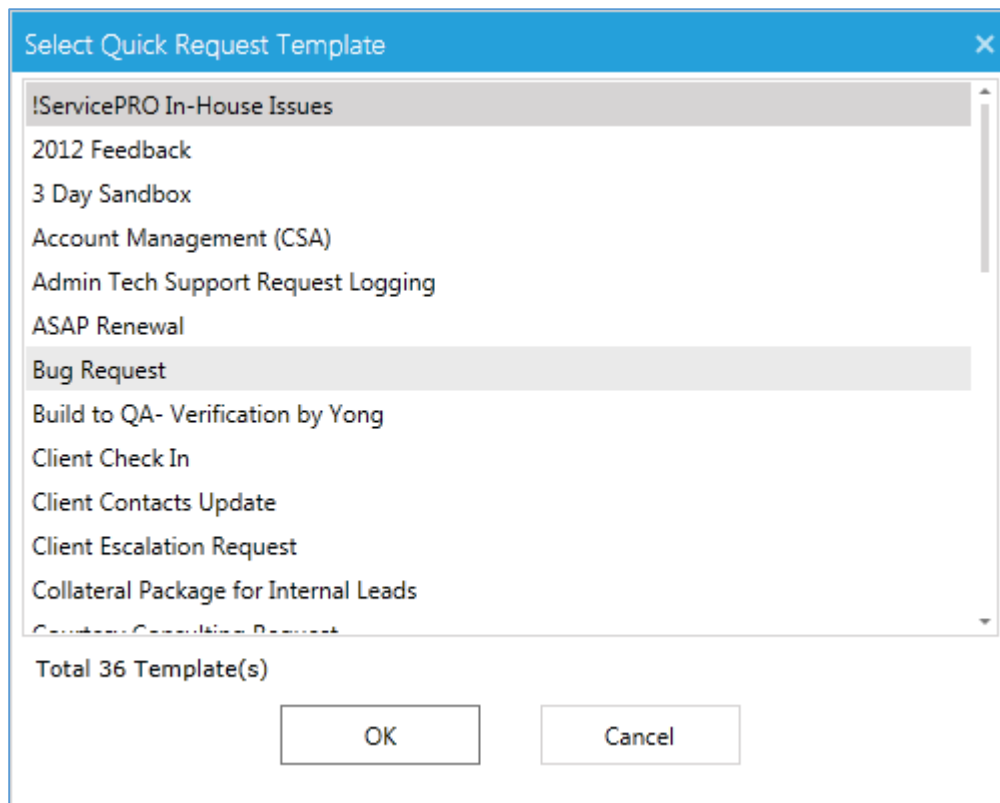
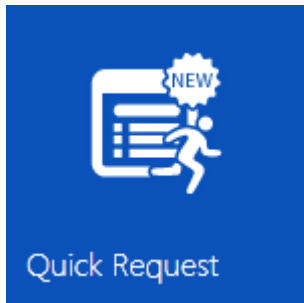
Private Memo

Calibri 9

Quick Request

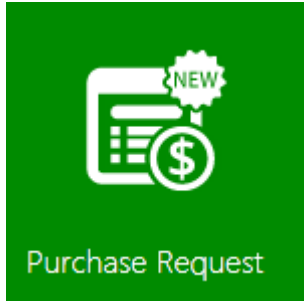
Clicking on this tile will prompt to select a quick request template from the list.

Users can create a service request using a predefined *Quick Request* template. Request templates are created for commonly occurring tasks or requests, and are pre-populated with default values and workflow options.



Purchase Request

This tile will open a new tab to create a new purchase request.



Search ServicePRO

Actions

- Save
- Delete
- Attach File
- Schedule Close
- Quick Message

Requester

- Requester Details
- Requester History
- Contact History

Lookup / View

Main [[Generic Purchase Request]]

Title:

General Information

Type: [Generic Purchase Request]

Requester: Douglas Chow

Category:

Asset:

Workflow

Folder: Dispatch - [Tech Support,Tech Dispatch]

Close First Call Resolution

Assign Work: UnAssigned

Responsibility: UnAssigned

Notification

Disabled From HelpSTAR Technical Support (Exchange)

Notification is disabled

CC Recipients:

Schedule

Begin Work: ASAP

Due By: ASAP

Importance

Urgency: Medium

Priority:

Line Item(s)

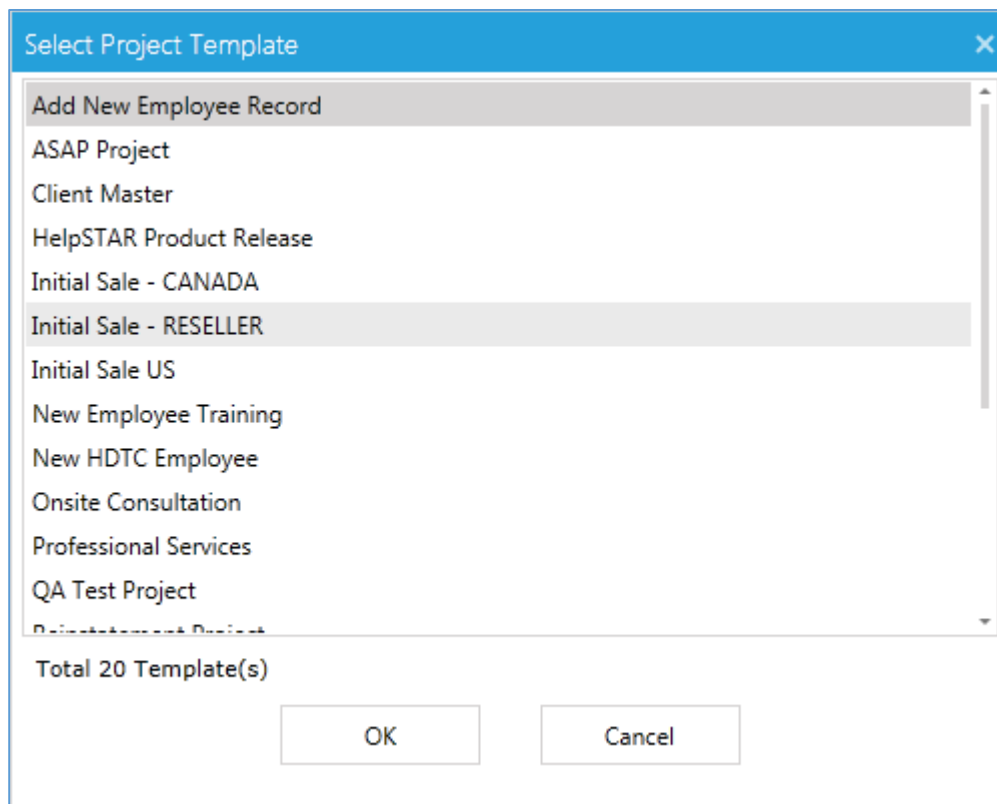
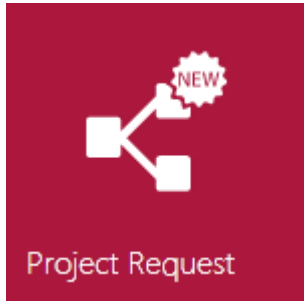
Time Worked: 0 minute on Wed, 13-Aug-2014 Time Code: 1 Private Memo Memo

Product	Vendor	Qty	Unit Cost	Total	Approved Qty	Status	Due By	Urgency	Memo	Allocation
Click here to add new item										

Project Request

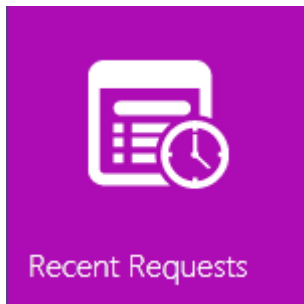
Many projects recur frequently in the life of a typical service desk. Examples include setting up new employees, testing procedures for software release and more. For recurring projects, it is helpful to design project templates that will automatically create a standard hierarchy of requests and child-requests.

Clicking on this tile will prompt to select a project request template from the list.



Recent Requests

Clicking on this tile will open a new tab that will have a list and preview of all the requests that were recently viewed by the user.



ServicePRO - Recent Requests
Search ServicePRO

Request ID	Time Logged	Project / Task	Priority
Sandeep Soni Ref#637654 : Vegas Training 2014 - ServicePRO Training Manual	10:15 AM	Vegas Training 2014 - ServicePRO Training Manual	Medium
Sandeep Soni Ref#617654 : Show-me project meeting notes	7:02 PM	Show-me project meeting notes	Medium
Sandeep Soni Ref#641742 : Special Project - ServicePRO - Training Center - Documentation (Help/ User Guide/Release Notes)	4:51 PM	Special Project - ServicePRO - Training Center - Documentation (Help/ User Guide/Release Notes)	Critical
Sandeep Soni Ref#641780 : Special Project - ServicePRO 2014 - WorkBench - Documentation [Help/User Guide/Release Notes]	6:06 PM	Special Project - ServicePRO 2014 - WorkBench - Documentation [Help/User Guide/Release Notes]	Critical
Sandeep Soni Ref#642845 : Special Project - ServicePRO 2014 - Release 3 [August 2014] - 14.0.71.x - Release Notes Preparation	6:32 PM	Special Project - ServicePRO 2014 - Release 3 [August 2014] - 14.0.71.x - Release Notes Preparation	Critical
Kawaljot Kaur Ref#646162 : Special Project - Standard report - New Samples for Standard Reports to be created [by running the latest Production build - 14.0.71.3]	10:24 AM	Special Project - Standard report - New Samples for Standard Reports to be created [by running the latest Production build - 14.0.71.3]	High
Vennila Rajes Ref#639022 : Special Project - Technical Specs Update - To remove the support for Windows XP on Client Machines	4:59 PM	Special Project - Technical Specs Update - To remove the support for Windows XP on Client Machines	High
Sandeep Soni Ref#641855 : Special Project - ServicePRO Editions & Licensing Structure - Document for Internal Communications	10:10 AM	Special Project - ServicePRO Editions & Licensing Structure - Document for Internal Communications	Critical
Sandeep Soni Ref#641782 : Special Project-ServicePRO 2014 - SDK - Utility to Import Service Requests from a CSV File - Documentation (Help/User Guide/Release Notes)	6:11 PM	Special Project-ServicePRO 2014 - SDK - Utility to Import Service Requests from a CSV File - Documentation (Help/User Guide/Release Notes)	Critical
Sandeep Soni Ref#644944 : Create a script - "Dashboard"	11:25 AM	Create a script - "Dashboard"	High

Activity Stream | Request Properties

(Douglas Chow) - Communications
Logged On: 7/16/2014 1:42 PM

Workflow
- Time Worked: 17 secs Worked on Wed, 7/16/2014
- Request suspended

Memo (Update)
Suspending Vegas Training materials until late Aug or Sept

(Douglas Chow) - Communications
Logged On: 7/8/2014 9:58 AM

Workflow
- Time Worked: 5 mins 28 secs Worked on Tue, 7/8/2014

Memo (Update)
Meeting with Sandeep from 9:30-9:46
Clarifications:

1. Format Ruby's Case Study docs in FM
2. Do Vegas Training 2014 manual half the day; the other half will be Help File
3. When working on Help File, set up separate Project Requests for each tasked; create each Request from Email, sent by other users
4. Send QMs (not emails) to Sandeep to notify when a doc is ready for revision
5. Save a clean copy without markup in the **K:\Vegas Training 2014** folder, along the one with markup
6. Make sure these are the two latest files, don't bother with older versions

- Also include a copy of 2013's manual for comparison purposes

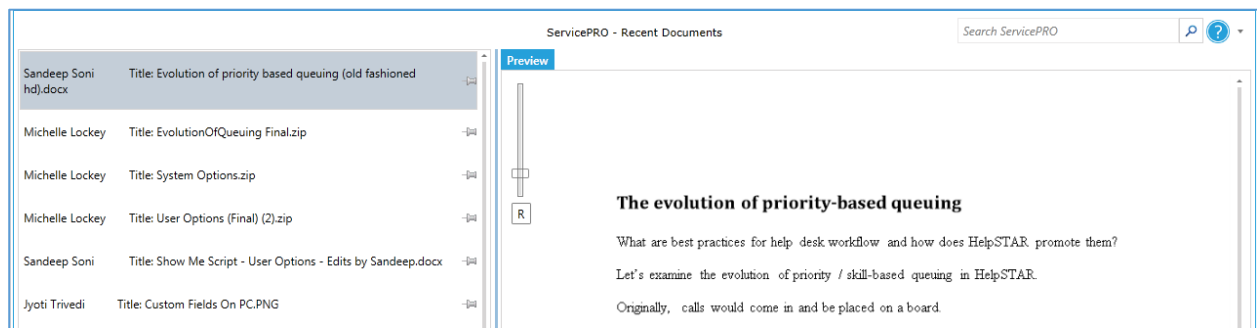
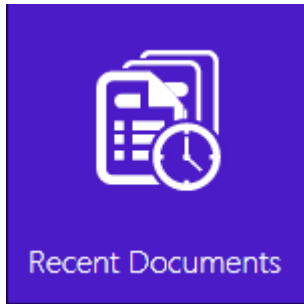
- Workspace section (Ch 3) may have to be shifted around a bit to accomodate what is covered

- For example, the Recent modules are covered in later chapters, but may have to be moved into this chapter

Search

Recent Documents

Clicking on this tile will open a new tab that will have a list and preview of all the documents/attachments that were recently viewed by the user.

A screenshot of the ServicePRO web interface showing a list of recent documents and a preview pane. The list includes documents from Sandeep Soni, Michelle Lockey, and Jyoti Trivedi. The preview pane shows the content of the selected document, "Evolution of priority based queuing (old fashioned hd).docx".

Author	Title	Actions
Sandeep Soni	Title: Evolution of priority based queuing (old fashioned hd).docx	[icon]
Michelle Lockey	Title: EvolutionOfQueuing Final.zip	[icon]
Michelle Lockey	Title: System Options.zip	[icon]
Michelle Lockey	Title: User Options (Final) (2).zip	[icon]
Sandeep Soni	Title: Show Me Script - User Options - Edits by Sandeep.docx	[icon]
Jyoti Trivedi	Title: Custom Fields On PC.PNG	[icon]

The evolution of priority-based queuing

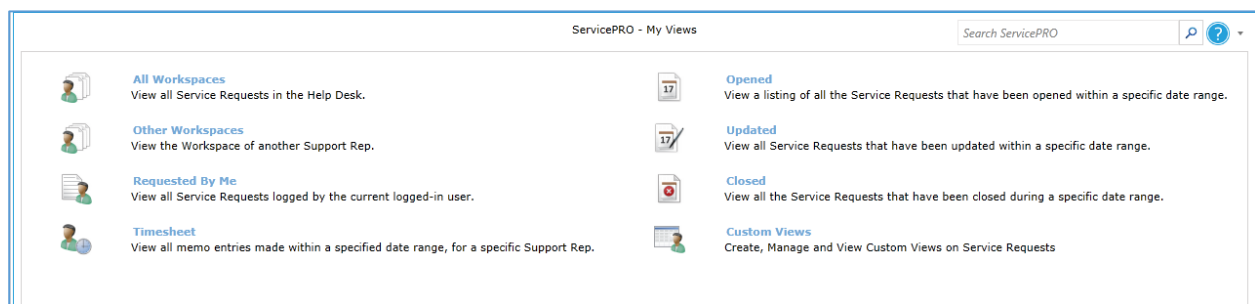
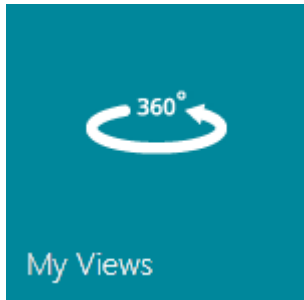
What are best practices for help desk workflow and how does HelpSTAR promote them?

Let's examine the evolution of priority / skill-based queuing in HelpSTAR.

Originally, calls would come in and be placed on a board.

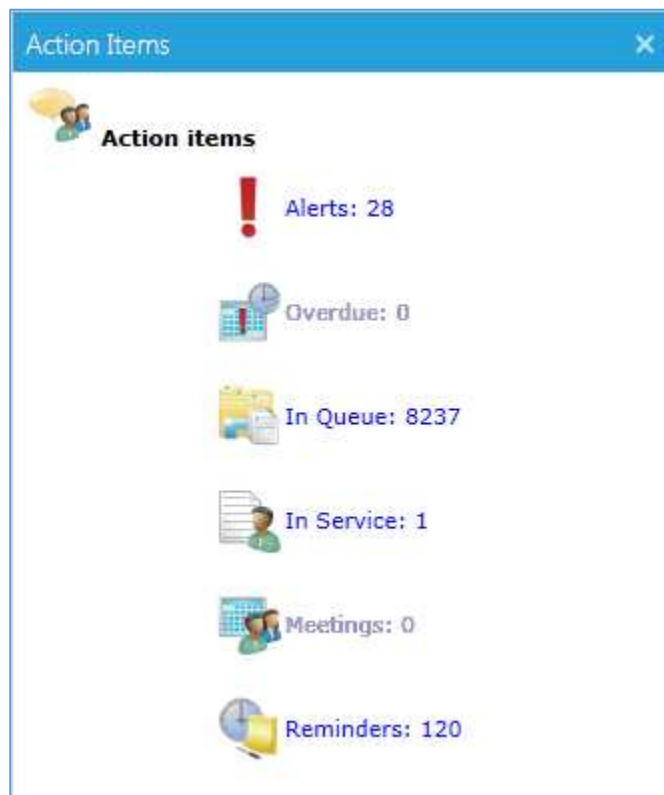
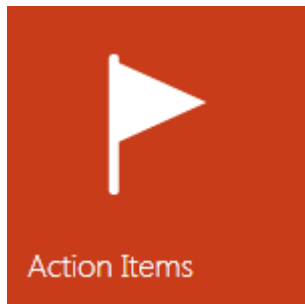
My Views

Clicking on this tile will open a tab for selecting different request views, including requests logged by yourself, closed requests, or open requests. In addition, you have the ability to create custom views and check other workspaces.



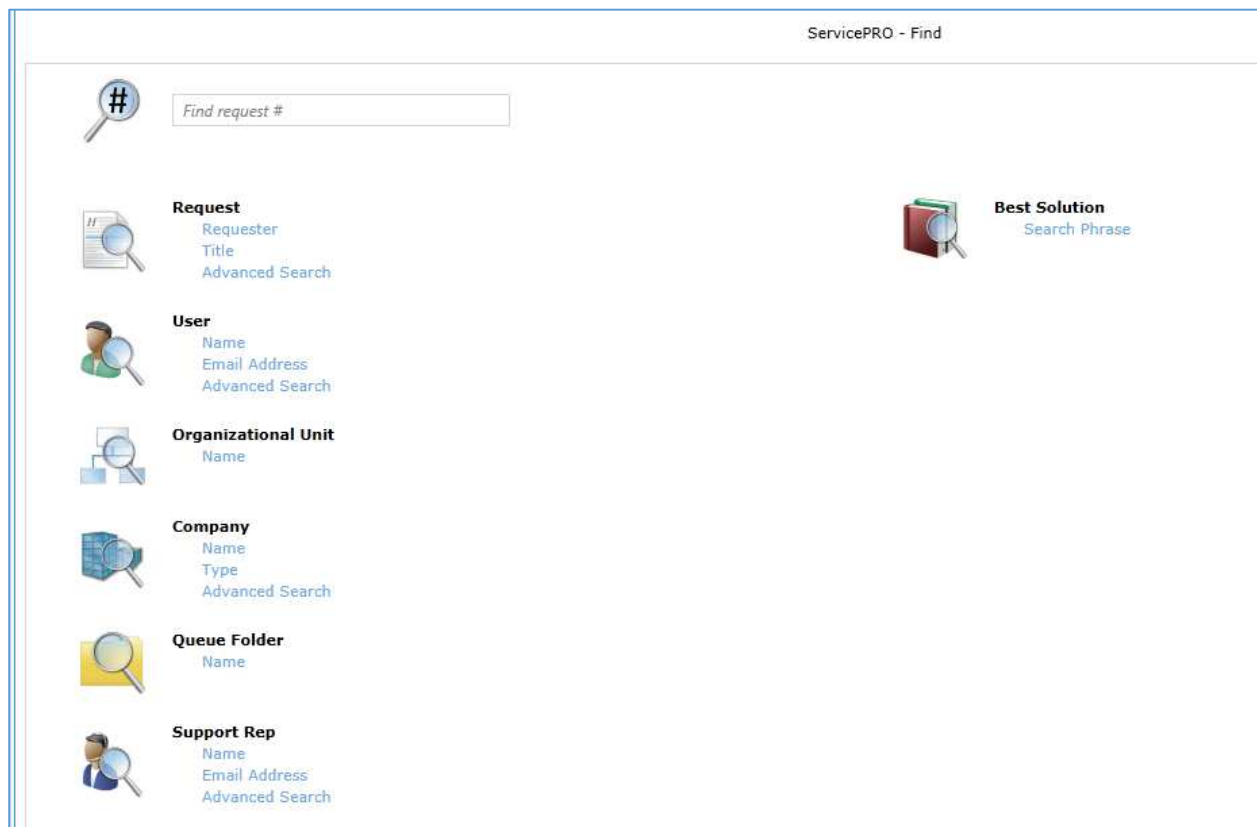
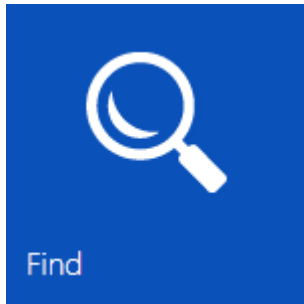
Action Items

Clicking this tile will display counters for all Action Items at a glance. Clicking on any of the action items will open a separate tab to display the list of notifications and requests.



Find

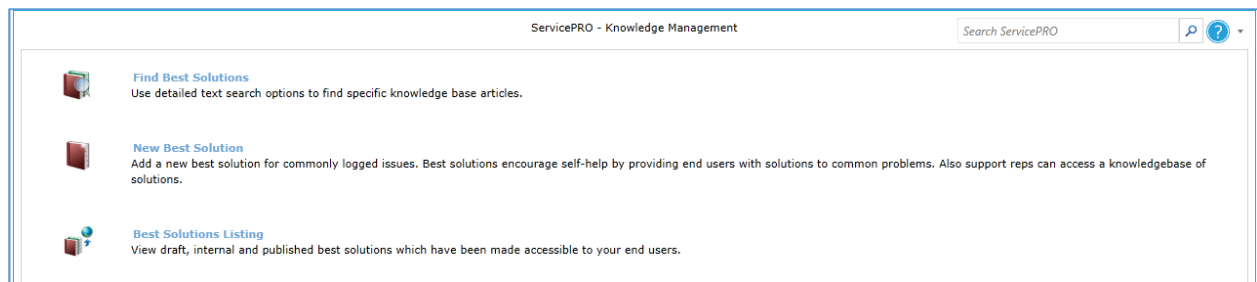
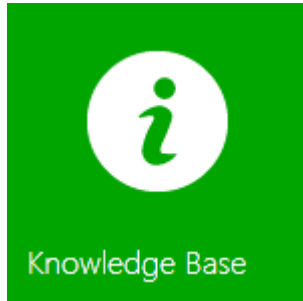
Clicking on this tile will open ServicePRO advanced search module, where you can specify various criteria's to narrow down your search results.



Knowledge Base

Clicking on this tile will open Knowledge Base module.

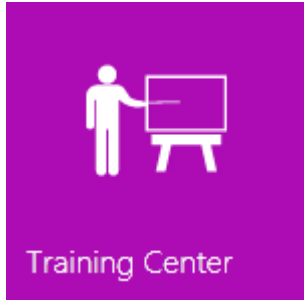
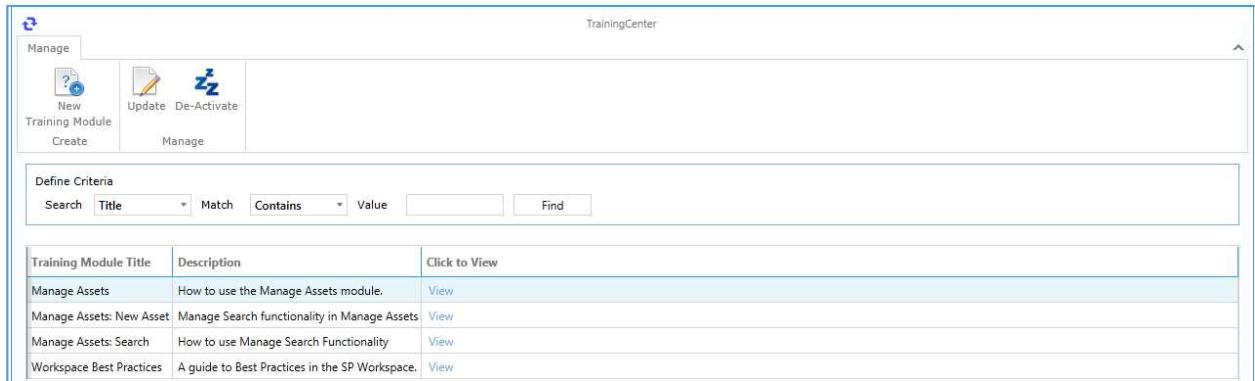
Building a knowledge base will assist in providing solutions to end users, which will potentially reduce the requests logged to your help desk. In this module ServicePRO users can create, view and search for best solutions.



Training Center

Clicking on tile will open Training Center module.

Training Center in ServicePRO facilitates delivery of training modules for not only ServicePRO, but any process and procedure in your organization.

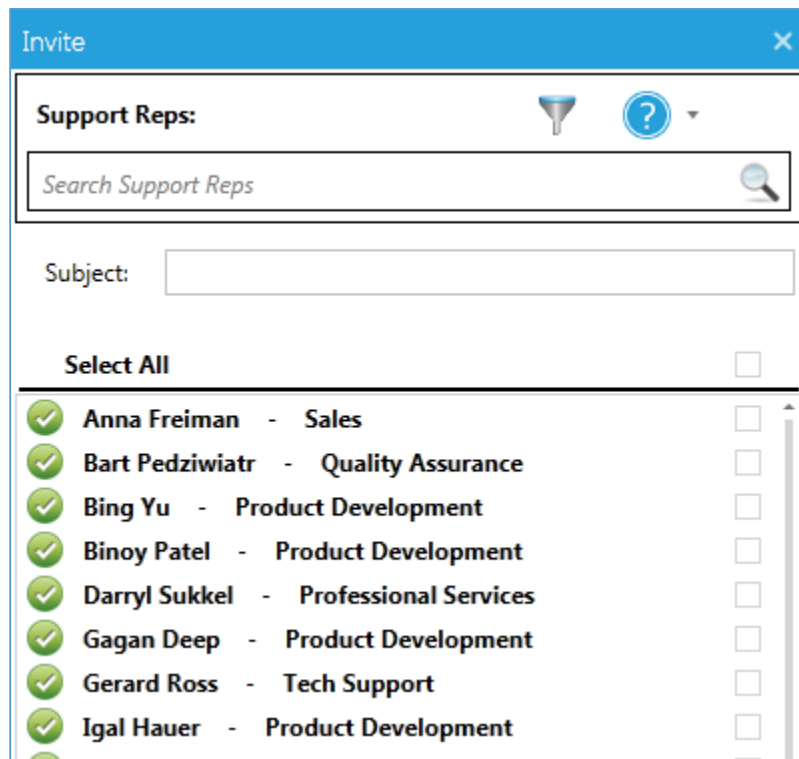
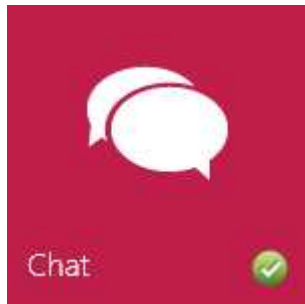



The screenshot shows the Training Center interface. At the top, there is a "Manage" tab and a "TrainingCenter" title. Below this, there are three buttons: "New Training Module Create", "Update", and "De-Activate Manage". A search bar is present with the text "Define Criteria" and fields for "Search Title", "Match", "Contains", "Value", and a "Find" button. Below the search bar is a table with the following data:

Training Module Title	Description	Click to View
Manage Assets	How to use the Manage Assets module.	View
Manage Assets: New Asset	Manage Search functionality in Manage Assets	View
Manage Assets: Search	How to use Manage Search Functionality	View
Workspace Best Practices	A guide to Best Practices in the SP Workspace.	View

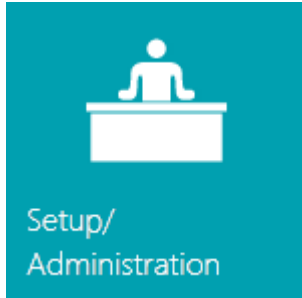
Chat

Clicking on tile will open Chat invite window. Users can also set their availability on the tile.



Setup/Administration

Clicking this tile will open the Setup/Administration module in a separate tab. Here you can manage ServicePRO Objects, Administration modules such as RBAC, Configuration modules such as system email or Design project templates and create request types.



HelpSTAR ServicePRO - Setup/Administration

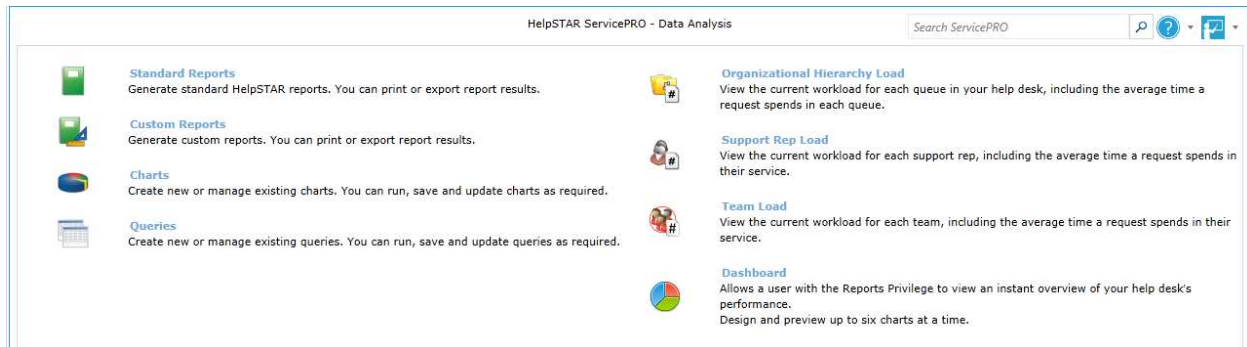
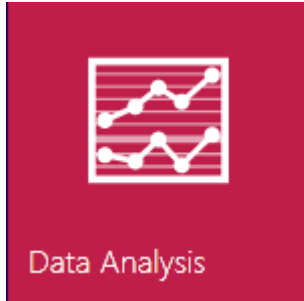
Search ServicePRO

ServicePRO Objects Administration Configuration Design

<p>Manage Users Create or Manage Users in ServicePRO Users are those people who interact with your help desk, including help desk staff, management and the users your help desk supports.</p>	<p>Manage Products Create or Manage Products in ServicePRO Products are items that can be requested when creating a purchase request.</p>
<p>Manage Teams Create or Manage Teams in ServicePRO A team is a group of users who interact with your help desk including teams of help desk staff, management and other users your help desk supports.</p>	<p>Manage Assets Create or Manage Assets in ServicePRO Assets consist of the hardware and software assets which belong to your organization.</p>
<p>Manage Roles Create or Manage Roles in ServicePRO A role is a specified group of privileges that can be assigned to a user or a team. A role is used to grant or deny access to functions and requests in ServicePRO.</p>	<p>Manage vendors Create or Manage Vendors in ServicePRO Vendors can be linked to products and services that are specified in a purchase request.</p>
<p>Manage Companies Create or Manage Companies in ServicePRO Companies are those businesses (external to your own) that you deal with as clients or vendors. Associate external users to their company for reporting, searching, and client history purposes.</p>	<p>Manage Manufacturers Create or Manage Manufacturers in ServicePRO Manufacturers are associated with products. This allows you to specify the manufacturer of each of the products that you purchase/support.</p>
<p>Manage Categories Create or Manage Categories in ServicePRO Each service request is assigned a category for reporting and analysis purposes.</p>	<p>Manage Announcements Broadcasts messages viewable by all Users. Users with Administrative privileges can add, edit Information such as scheduled downtime, upcoming changes or maintenance notes can be published here to inform the user base or help desk staff.</p>
<p>Manage Organizational Hierarchy Create or Manage Organizational Hierarchy in ServicePRO Queue folders are holding areas where requests are stored for a qualified rep to begin work. Queue folders ensure a balanced workload for support reps and accurate prioritization of requests.</p>	

Data Analysis

Clicking on this tile will give you the options to work with Reports, Charts, Queries, and Dashboards.



The screenshot shows the "HelpSTAR ServicePRO - Data Analysis" interface. At the top, there is a search bar labeled "Search ServicePRO" and navigation icons. The main content area is divided into two columns of options, each with an icon and a brief description:

- Standard Reports**: Generate standard HelpSTAR reports. You can print or export report results.
- Custom Reports**: Generate custom reports. You can print or export report results.
- Charts**: Create new or manage existing charts. You can run, save and update charts as required.
- Queries**: Create new or manage existing queries. You can run, save and update queries as required.
- Organizational Hierarchy Load**: View the current workload for each queue in your help desk, including the average time a request spends in each queue.
- Support Rep Load**: View the current workload for each support rep, including the average time a request spends in their service.
- Team Load**: View the current workload for each team, including the average time a request spends in their service.
- Dashboard**: Allows a user with the Reports Privilege to view an instant overview of your help desk's performance. Design and preview up to six charts at a time.

Header Modules

The top of the Workbench features additional options that includes Search functionality, access to Help Files, and User Options.

Search ServicePRO

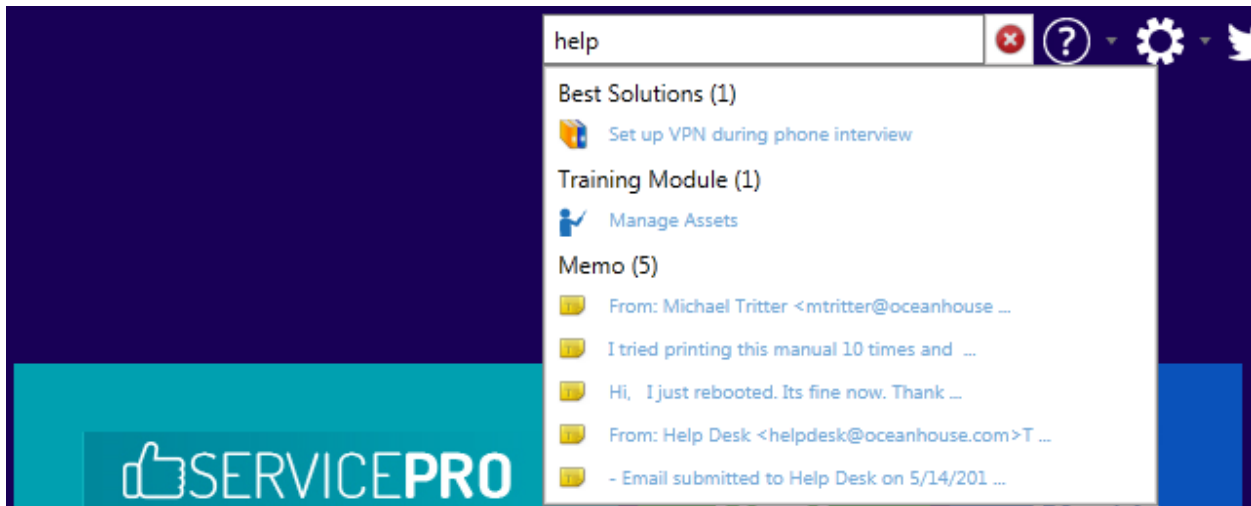
The search bar allows you to seek out related memos, requests and other items for a specific keyword(s) across various ServicePRO objects.



Search results can include the following categories:

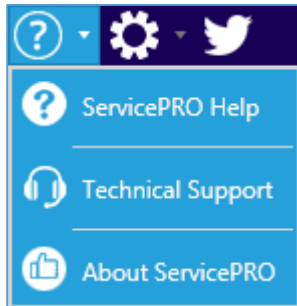
- Best Solutions
- Calendar Items
- Companies
- Organizational Units
- Service Requests
- Training Modules
- Documents
- Memos

A number in brackets next to the type of result indicates how many total items have been found. If the desired item does not appear in the search list, click on the result type (i.e. Best Solutions, Memos) to view all of those results.



Help and Support (Question Mark Icon)

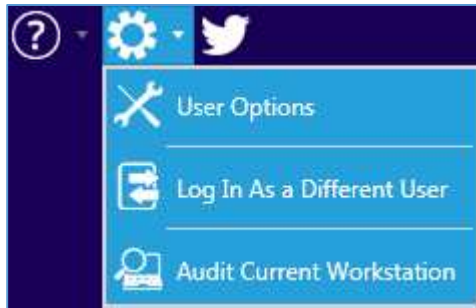
Additional links to help and support pages can be found under the Question Mark icon in the header.



- **ServicePRO Help** – Opens the help file.
- **Technical Support** – Opens the End User Portal, located at <http://enduser.helpstar.com>
- **About ServicePRO** – Provides ServicePRO information such as ServicePRO's current version number, License information, Default System Email Account and company Website URLs.

Options (Gear Icon)

User Options, as well as Log Out and Auditing functionality can be found under the gear icon.



- **User Options** – Adjust and customize a variety of different user-specific options
- **Log In as a Different User** – Logs out of the current account to log in as a different user.
- **Audit Current Workstation** – This will perform a software and hardware audit on the current computer

Summary	Device Driver	Disk Drives	Printers	Communication Settings	Installed Software
Computer Name:	HD400				
Computer Description:					
Domain:	helpstar.com				
Organization:					
Registered To:	hsadmin				
System Manufacturer:	System manufacturer				
System Model:	System Product Name				
Serial Number:	System Serial Number				
Processor:	Intel(R) Core(TM) i7-2600 CPU @ 3.40GHz				
Processor Speed:	3401				
Processor Id:	0000-06A7-BFEB-FBFF-0002-0000				
Operating System:	Microsoft Windows 7 Enterprise Service Pack 1.0				
BIOS:	BIOS Date: 04/20/12 10:17:49 Ver: 37.01				
BIOS Date:	4/20/2012 12:00:00 AM				
BIOS Version:	ALASKA - 1072009				
BIOS Tag:	Asset-1234567890				
Login Name:	HELPSTAR\dchow				
Network Address:	C8:60:00:5A:14:DC				
TCP/IP Address:	172.17.233.164,fe80::2003:9c57:7a7e:752				
Product Type:					
Keyboard:	Enhanced (101- or 102-key)				
Pointing Device:	Microsoft Hardware USB Mouse				
Date Audit:	8/11/2014 8:15:42 PM				
Total Memory [RAM]:	7906MB				
Memory Available:	3968MB				
Screen Resolution:	1024x768 Pixels				

A.

Twitter

Selecting the Twitter icon opens ServicePRO’s Twitter page.

@ServicePROnews (<https://twitter.com/ServicePRONews>) will open in a new tab or window.

1.2. Training Center

What is the Training Center?

Human capital is the most expensive resource in a knowledge based economy. ServicePRO's Training Center promotes the development of employees skills (in any department or discipline), and retention of corporate knowledge. Training Center facilitates delivery of training modules for not only ServicePRO, but any process and procedure in your organization.

Manage Training Center Privileges

A licensed user with any of the below listed privileges will have the ability to manage the Training Center in ServicePRO.

- ServicePRO Administrator
- Access Control
- Asset Administrator
- Data Analysis Designer
- Object Designer
- Project Designer
- Rule Designer

How to access Training Center in ServicePRO

- 1) Via the Training Center tile from the WorkBench.

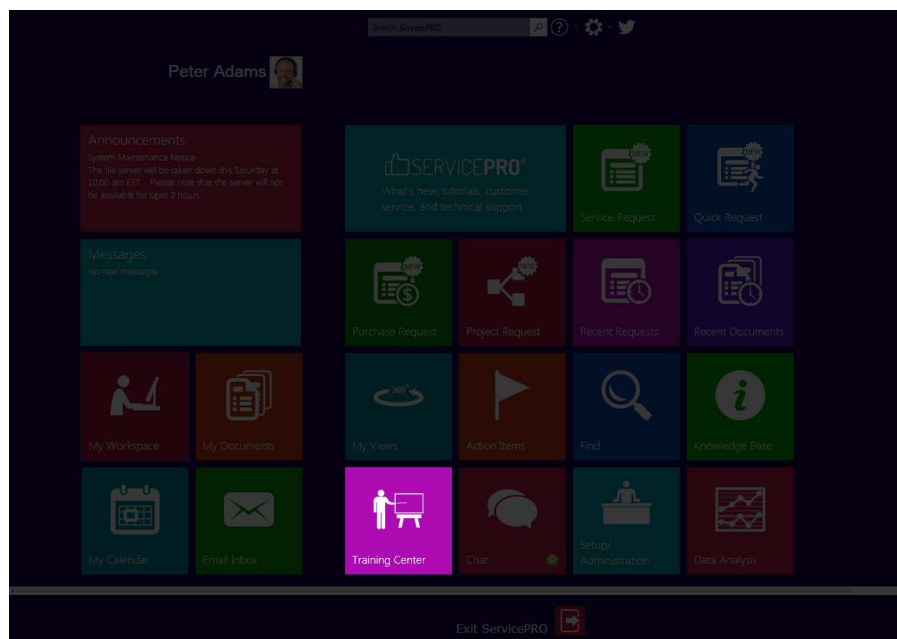


Figure 1.2-1: Training Center highlighted on the WorkBench screen

- From the context-sensitive Training Center icon, located on the upper right of ServicePRO screens

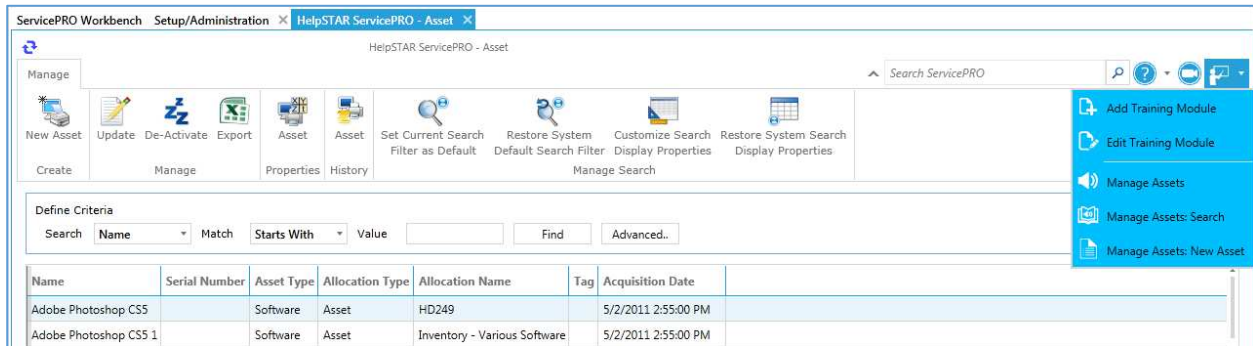


Figure 1.2-2: Manage Assets' Training Module menu

Training Center Main Screen

When the Training Center is selected from the WorkBench, it will take the user to the following Screen:

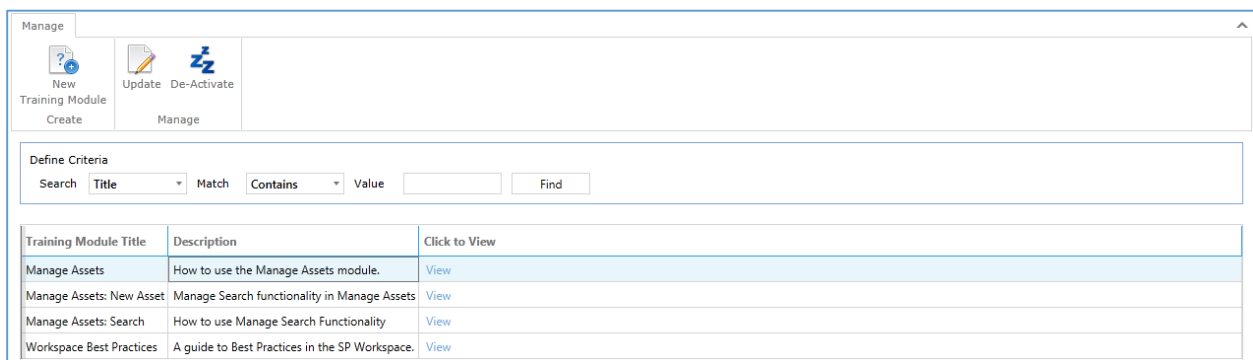


Figure 1.2-3: Training Center's main page with System Management privileges enabled.

Depending on privileges set for a licensed user, they will be allowed or prevented from viewing specific functions for the Training Center.

If the user has not been assigned any privileges listed in the above section, options for Managing the Training Center such as **Add**, **Update** and **De-Activate** will be unavailable,. The user will only be presented with the list of Training Modules that are accessible to them (i.e. filtered based on which screens the user has access to).

The user will be able to click the **View** link beside each training module to view it.

The user can search for specific accessible training modules in the Search field.

Creating new Training Module from the Training Center

New Training Modules can be created by selecting the icon in the upper left corner.

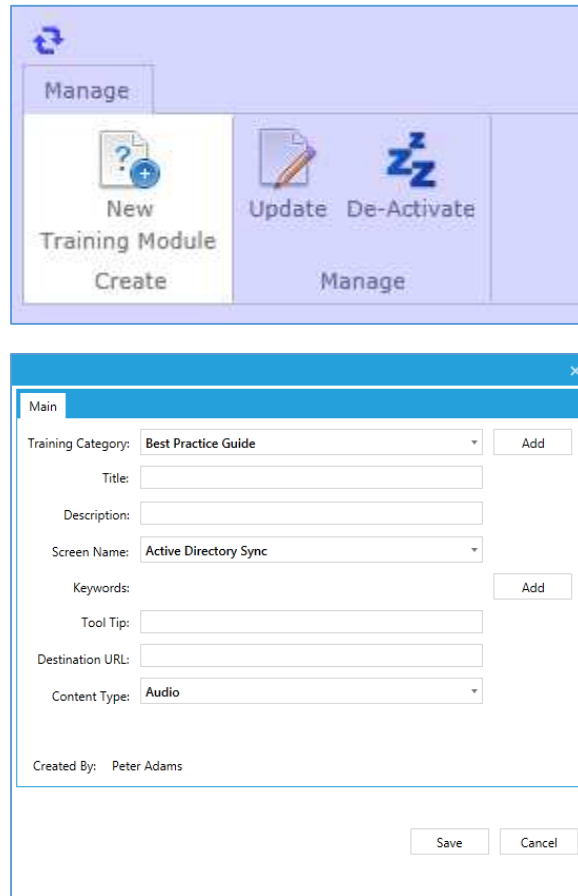


Figure 1.2-4: New Training Module

The New Training Module window will open, and you will be able to populate fields with information to create a Training Module. Note that the following fields are mandatory for completion:

- Training Category
- Title
- Screen Name
- Destination URL
- Content Type

Training Category

By default, the available categories will be:

- Best Practice Guide
- Training Module
- Tutorial

Note that Users may also add more Training Categories to the list using the **Add** button. The Default Categories, however, cannot be modified.

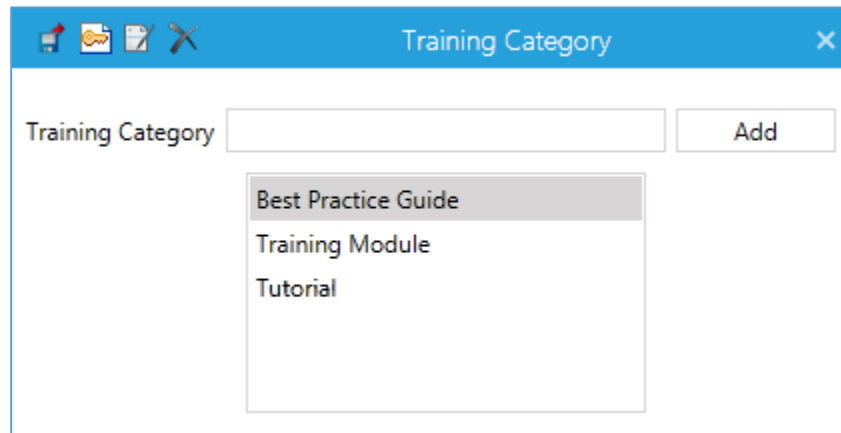


Figure 1.2-5: Adding new Training Categories.

Title

This will determine the title that is displayed in Training Module lists.

Description

A brief description for the Training Module, stated under the **Description** column in the list.

Screen Name

This dropdown list features every module in ServicePRO that can be assigned a Training Module.

In some cases, selecting a Screen Name will enable an additional Object Name field.

“Object Name”

The Object Name field’s label will dynamically change based on the Screen Name selected. Not all Screen Names will have Name fields associated to them.

Examples:

- If Charts or Dashboard Designer is selected, **Chart** name will be displayed.
- If Query Designer is selected, **Request Query Name** will be displayed.
- If Manage Assets is selected, **Asset Type** will be displayed.
- If Manage Users is selected, **User Type** will be displayed.

Screen Name:	Charts
Chart Name:	Closed by Day - This Month

Screen Name:	Query Designer
Request Query Name:	All Reminders

Screen Name:	Manage Assets
Asset Type:	Building

Screen Name:	Manage Users
User Type:	Internal Staff

Figure 1.2-6: Examples of “Name” fields enabled by specific Screen Name selections.

Keywords

Keywords can be added to this field, and any entries can be used as additional search queries for the Training Module.

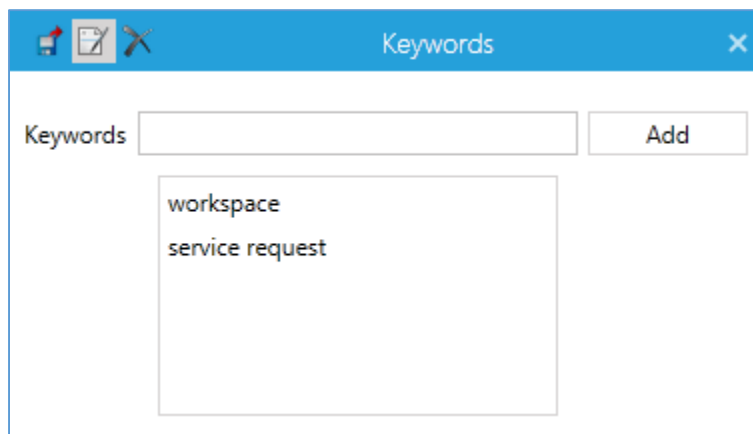
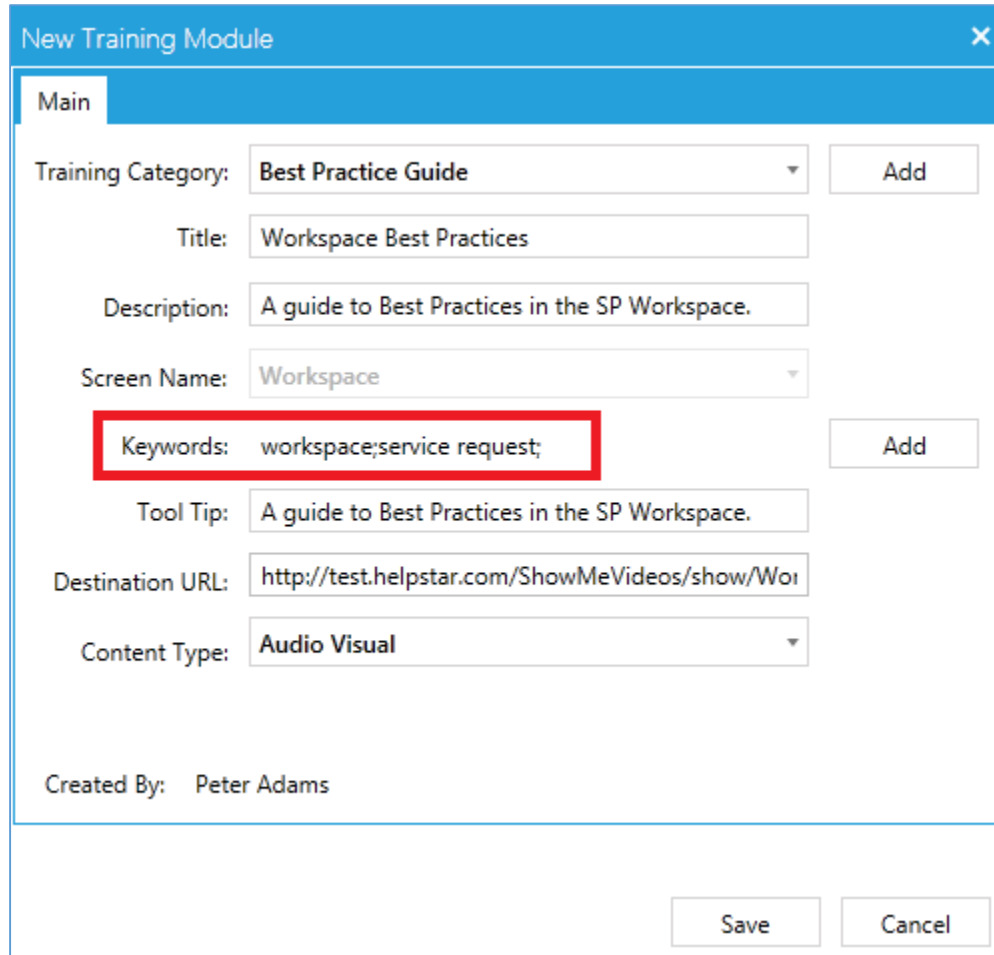


Figure 1.2-7: Adding Training Module Keywords



New Training Module [X]

Main

Training Category:

Title:

Description:

Screen Name:

Keywords:

Tool Tip:

Destination URL:

Content Type:

Created By: Peter Adams

Figure 1.2-8: The Keywords are listed here, separated by semicolons.

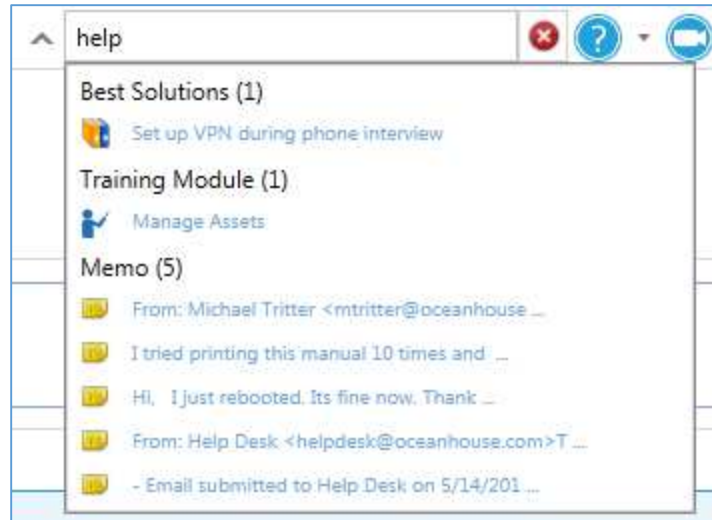


Figure 1.2-9: Searching using keywords will allow you to find Training Modules.

Tool Tip

Write a brief description of the training module here. When selecting a training module from any other part of ServicePRO, hovering the mouse over one of the Tool Tip options will produce a Tool Tip briefly.

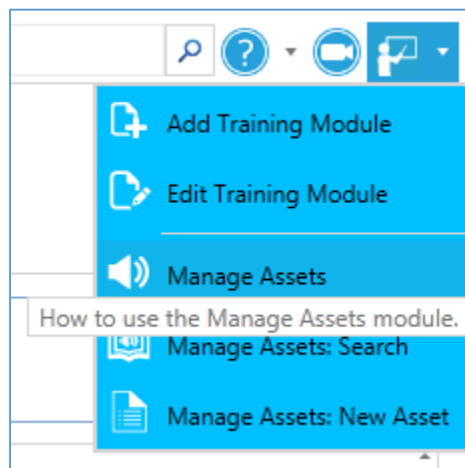


Figure 1.2-10: Tooltips are displayed when hovering over Training Modules.

Destination URL

The Destination URL will allow you to place the custom URL for where your Training Module is located. Selecting the Training Module or clicking 'View' in the Training Center will open the link to the Training Module in your default browser or application.

Content Type

Here you can designate the icon to represent the type of content being shown in the module. Select from the following:

1. **Audio**
2. **Audio Visual**
3. **Document**

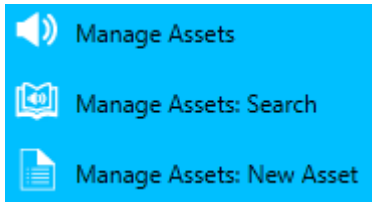


Figure 1.2-11: Audio, Audio Visual and Document Training Modules feature separate icons.

View Training Modules

All users will be able to view Training Modules by selecting the upper right icon. Training Modules will be listed with icons indicating the type of content (Audio, Audio-Visual, or Document).

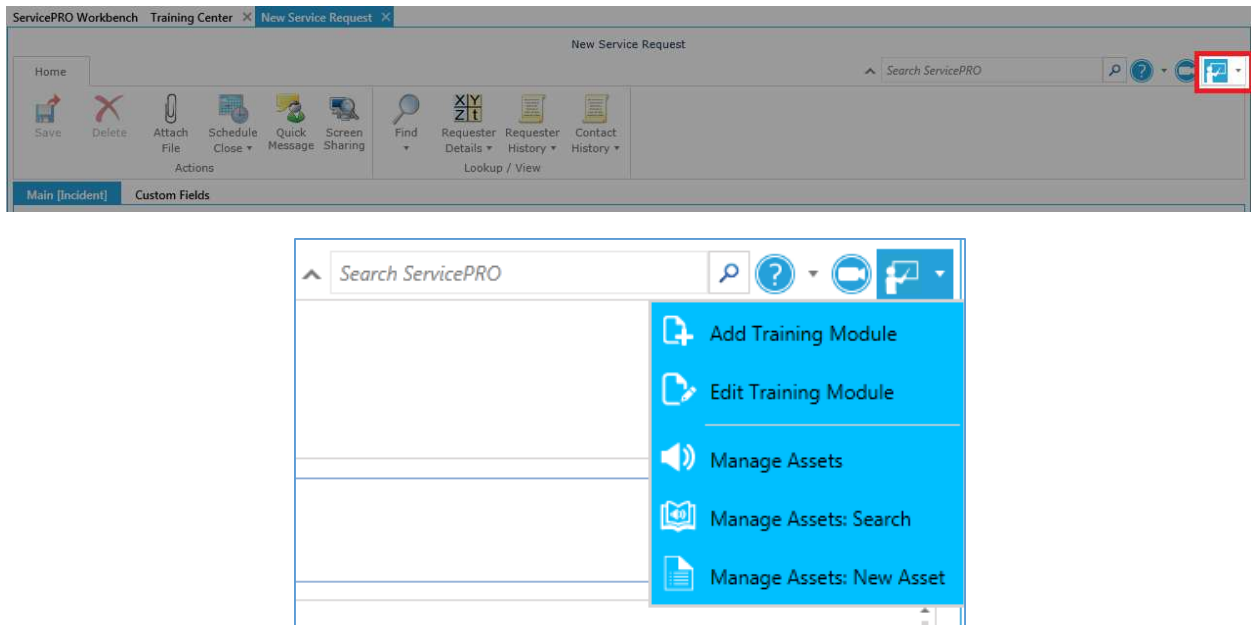


Figure 1.2-12: Accessing screen-specific Training Center options

Adding and Editing Training Modules to Screens

If user has privileges for managing the Training Center, a menu for Add and Edit will also be available in the drop-down

Add Training Module

Fill in the fields to complete information about the new Training Module. The 'Screen' field will automatically be filled indicating the screen for which training module is being created.

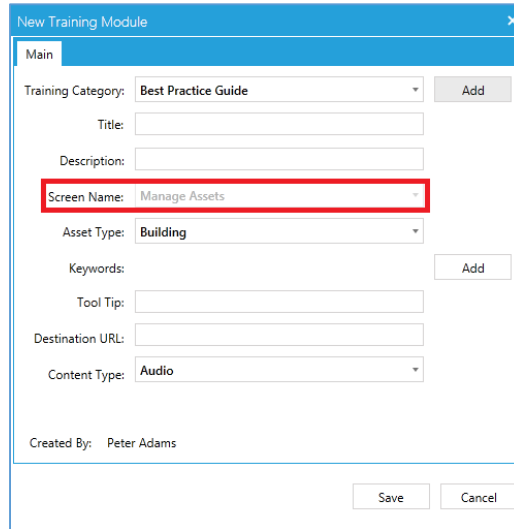


Figure 1.2-13: Screen Name cannot be altered if Adding a Training Module out of a particular page.

Edit Training Module

An additional dropdown list will pop out, allowing you to select which module you wish to edit.

Like with Add Training Module, the Screen Name field cannot be edited when editing a Training Module this way. The "Object Name" field, if applicable, will also already be set as a result.

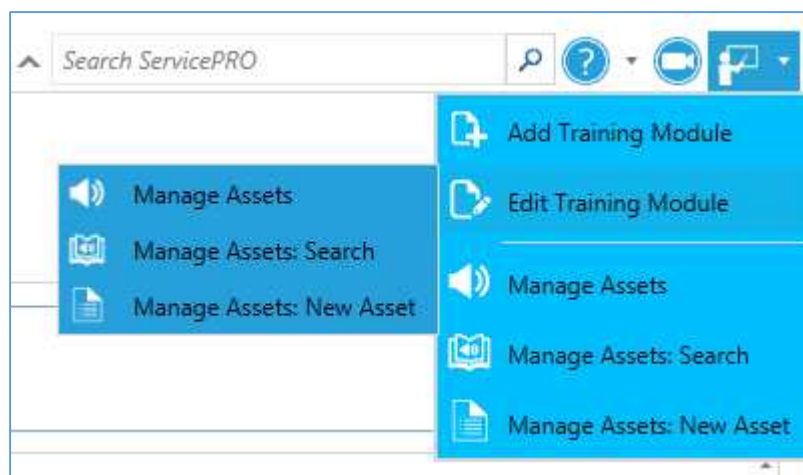
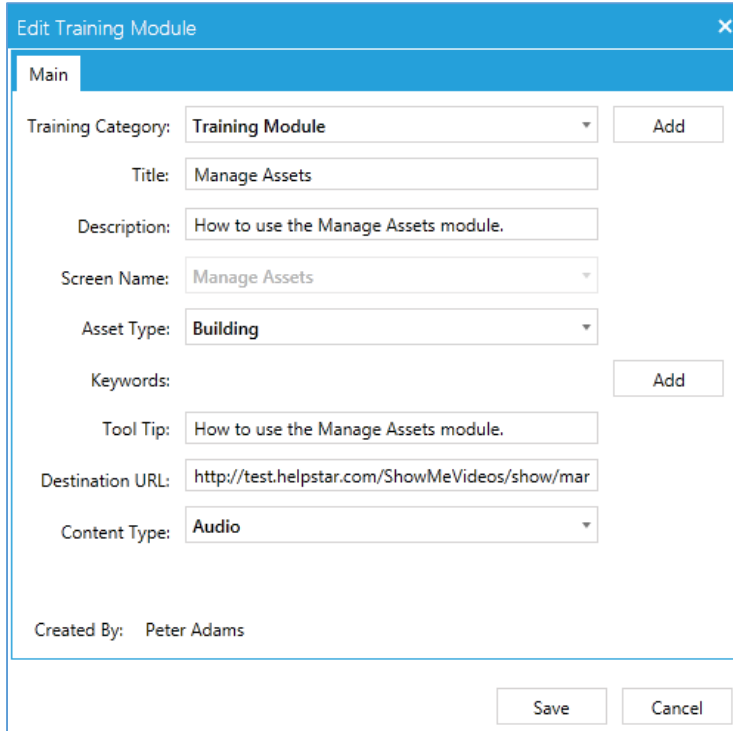


Figure 1.2-14: Edit screen-specific Training Modules



Edit Training Module [X]

Main

Training Category:

Title:

Description:

Screen Name:

Asset Type:

Keywords:

Tool Tip:

Destination URL:

Content Type:

Created By: Peter Adams

Figure 1.2-15: Screen Name cannot be altered if Editing a Training Module out of a particular page. Other fields will already be populated.

Updating and Deactivating Training Modules

Under the Manage grouping in the Ribbon Toolbar, there are options for Updating and Deactivating selected Training Modules.

Update

This would open the Add/Edit Training Module dialog in Edit Mode with loading all the existing properties of the selected Training Module facilitating the user to update the required properties.



Figure 1.2-16: Update Training Modules icon

De-Activate

De-activating an Existing Training Module is possible from the Training Center Screen by selecting an Existing Training Center module in the list and clicking on 'De-Activate' ribbon menu.

Note it is possible to choose multiple entries to De-activate by holding down CTRL and selecting multiple list items.

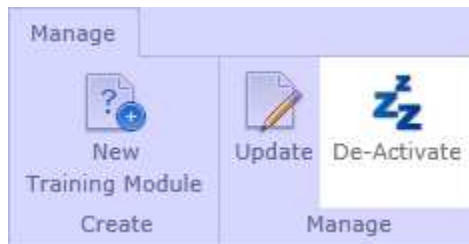


Figure 1.2-17: De-Activate Training modules icon

Deleting and Re-activating Training Modules

The option to Re-activate or Delete a de-activated Training Module is available under the **Setup/Administration – Administration** tab, as illustrated in the picture below.

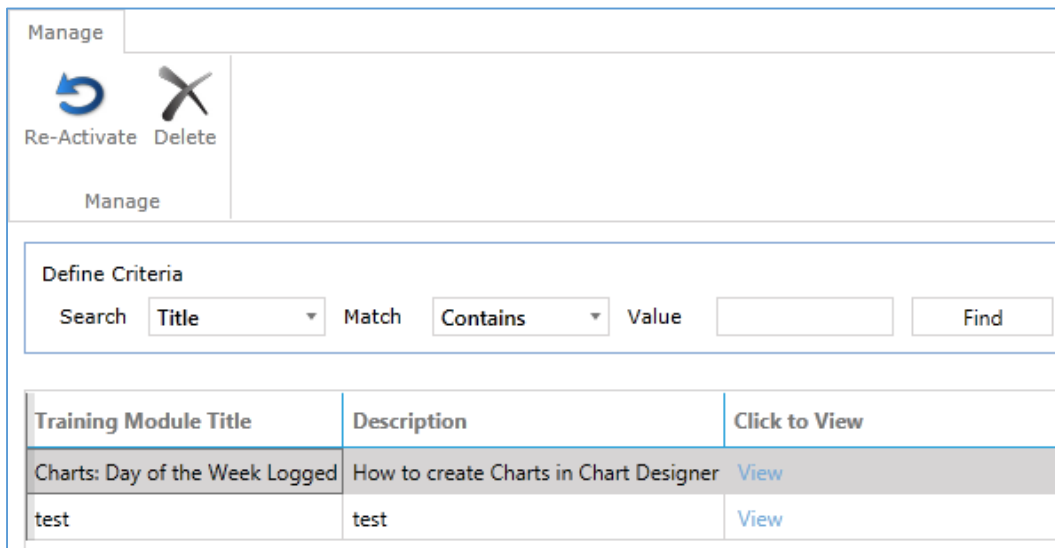
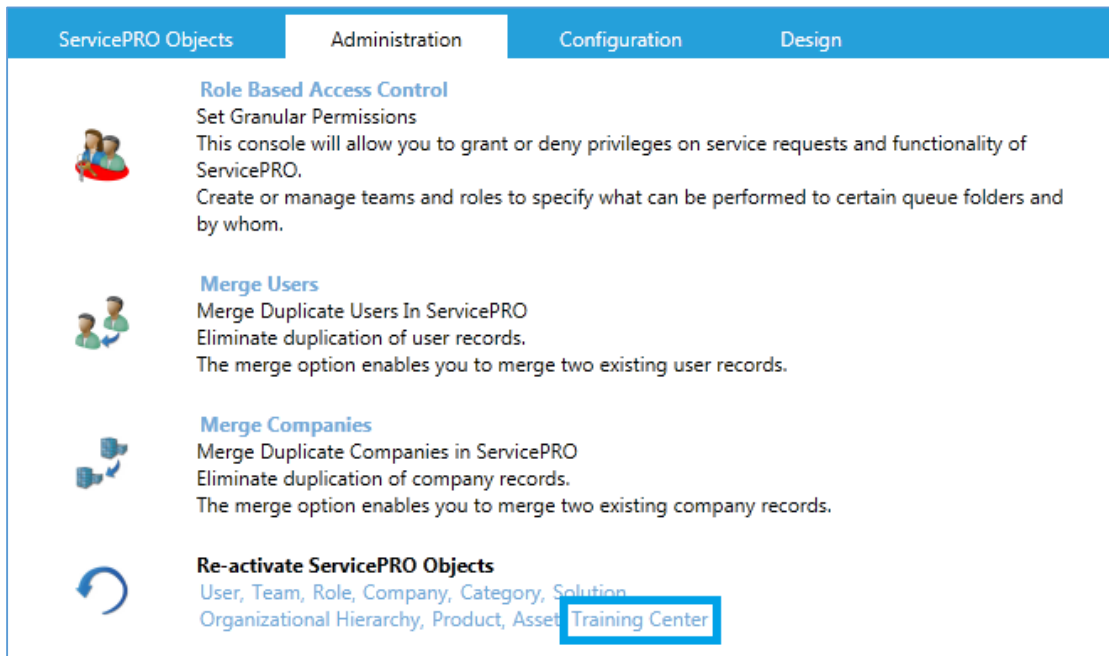


Figure 1.2-18: Accessing the Re-activate ServicePRO Objects – Training Centre screen.

Clicking on Re-Activate Ribbon menu option will re-activate the currently selected de-activated Training Module item in the list. Likewise, clicking on **Delete** in the Ribbon menu will delete the currently selected deactivated Training Module items in the list after prompting the user for Delete Confirmation.



Figure 1.2-19: Re-activate and Delete deactivated Training Modules from the ribbon.

Searching in Training Modules

Find Functionality in the Training Center

Entering a value and searching using the Find function will populate the list with Training modules that match the search criteria.



Figure 1.2-20: The Find fields above the list of Training Modules

Training Modules in ServicePRO Global Search

ServicePRO Global Search can also search for Training Modules, using values set in the following fields:

1. Training Module Title
2. Training Module Description
3. Training Module Keywords

If the user has privileges to manage the Training Center, he will be able to see all training modules in the system.

If user does not have these privileges, the Training Modules will be filtered based on which screens the user has access to.

2. Service Requests Import Utility (Open Source)

Import Utility Overview

This document describes the details on the usage of the utility to import Service Requests from CSV files.

What is the Service Requests Import Utility?

This is an open source utility developed using ServicePRO SDK to import Service Requests and memos into the ServicePRO database from a comma-separated values (CSV) file.

Data for tickets can be exported from other Help Desk systems into CSV file, then added into ServicePRO Database en masse using this import utility thus facilitating quicker and easier import of data for Service Requests without needing to create the tickets one by one manually from the ServicePRO application.

Pre-requisites, Scope and Limitations of Service Requests

Import Utility

1. The input data for Service Requests Import must come in a CSV (comma-separated values) file.
 - Only the very first row should contain Column/Field Names.
 - All other rows should contain the data values for the fields.
 - One CSV File for Service Requests and One CSV File for Memos, linked using a Logical Request ID, supplied by both CSV files.
2. The following basic properties of Request are required fields for creating Service Requests and they should be coming in the CSV file:
 - Request Title
 - Requester Name
 - Priority
3. The following information coming in the CSV file should be already present in the ServicePRO for the import to happen for the specific record:
 - Requester name
4. It is possible to have multiple memos imported per ticket.
5. The User need to provide a folder ID in which all the requests will be imported to.
6. The User needs to select the request type (UDF or Generic) and map it appropriately.
7. It is not possible to import the following Base Service Request fields:
 - **TimeStateChanged** – This field is updated automatically whenever the request data is inserted or updated
 - **Status** – Status in ServicePRO may not match with the Status coming from another application

8. It is not possible to import the following Custom Fields:

- Reference Fields
- DB Lookup Fields (LookupBox)
- Function Fields
- Masked Entry

Only the following Custom Fields Data can be imported: Text, HyperLink, Numeric, Date, CheckBox, DropDown, RadioButton. No validation will be applied; the user should ensure that the CSV file contains correct field data.

9. Requester name and Memo author name are mapped to tbluser.name

10. Following elements are hard-coded in the Open Source (limitations):

- **Service URL** (i.e. <http://localhost/HelpSTAR.Server/>): This needs to be updated to the Client's ServicePRO WCF Service URL
- **ServicePRO userid and password**: This needs to be updated to a User with Administrative credentials in the client's ServicePRO Database

Fields Mappings for CSV file Data

Mapping fields for the Service Requests CSV file should contain the following criteria:

- **Required fields mapping:** RequestID (Logical Request ID for Mapping to Memos in Memo CSV File), Title, Requester, Priority code
- **TimeLogged:** This is an optional date-time field. If the user does not map it, then it will use current date time to log a ticket. Otherwise it will use the mapped field.
- **UDF fields mapping:** This should contain only basic fields (ie. numeric, text, datetime) without validation

NOTE: The Request ID that comes in the CSV file is used in logical mapping for memo imports. The actual Request ID will always be generated by the utility.

The Memos CSV file is optional – If you do not import a memo, then the imported request will have default one memo. The mapping of fields for Memo CSV file are as follows:

- **Required fields mapping:** RequestId [Logical Request ID for Mapping Memos to Requests in Requests CSV File], author, type, memotime, text memo

For the Service Requests imported using the Service Requests Import utility, the Category will be set to [none] by default. As a result, when a user tries to save these imported requests in ServicePRO, the user will be prompted to select a category.

How to access the ServicePRO Import Utility

Service Request Import Utility is supplied as an open source code visual studio project as part of ServicePRO SDK.

Technical Pre-requisites

Technical Prerequisites to build and run the Open source Service Requests Import utility are as follows:

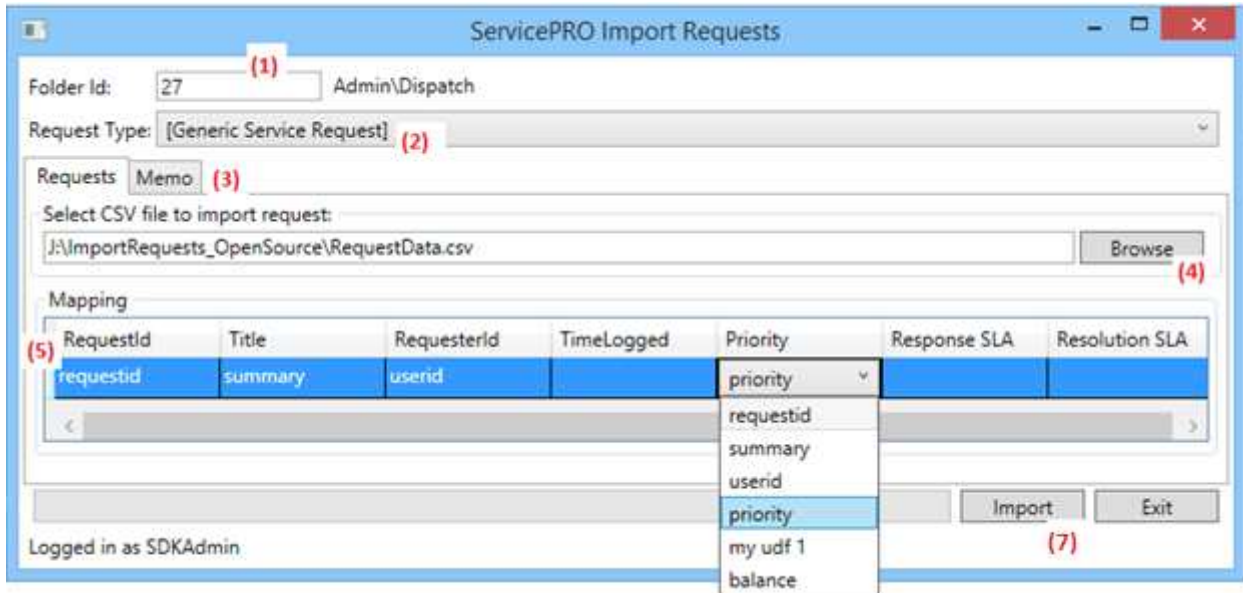
- ServicePRO 14.0.72.6 version or Later
- ServicePRO SDK 14.0.72.6 version or Later
- Microsoft Visual Studio 2013
- .NET framework 4.5+

Detailed Steps to Configure, Build and Run the Utility

1. Extract the provided zip (ServicePRO_SDK_14.0.72.6) file into a local directory.
2. Using Visual Studio 2013, browse to the extracted files location and open the project file ImportRequests.csproj.
3. Correct and/or add the references in the project for the following ServicePRO SDK related DLL files:
 - HelpSTAR.PCL.Common.dll
 - HelpSTAR.PCL.ObjectDesigner.dll
 - HelpSTAR.Transport.Hybrid.dll
 - ICSharpCode.SharpZipLib.dll
 - ServicePRO.Sdk.Windows.dll
4. Open MainWindow.xaml.cs and on the Window_Loaded method, update with your ServicePRO service url [This URL can be found in the web.config of your ServicePRO installation, typically found under: C:\HelpSTAR\HSSITES\HSSupportNET\web\
`//Step 1: Set Server URL (This is stored in Web.config for ServicePRO.Web)`
`ServerSettings.SetServiceUri("http://localhost/ServicePRO.Server/");`
5. Update with the user login name and password for an admin user in ServicePRO. The utility will use these credentials to login as that user.
`//Step 4: Login`
`_loginManager.Login(selectedDomain, _session, "SDKAdmin", "helpstar", true,`
6. After correct url and login information has been provided, build and run the utility.

User Interface Overview

Requests Tab Selected



ServicePRO Import Requests

Folder Id: Admin\Dispatch

Request Type: [Generic Service Request]

Requests Memo

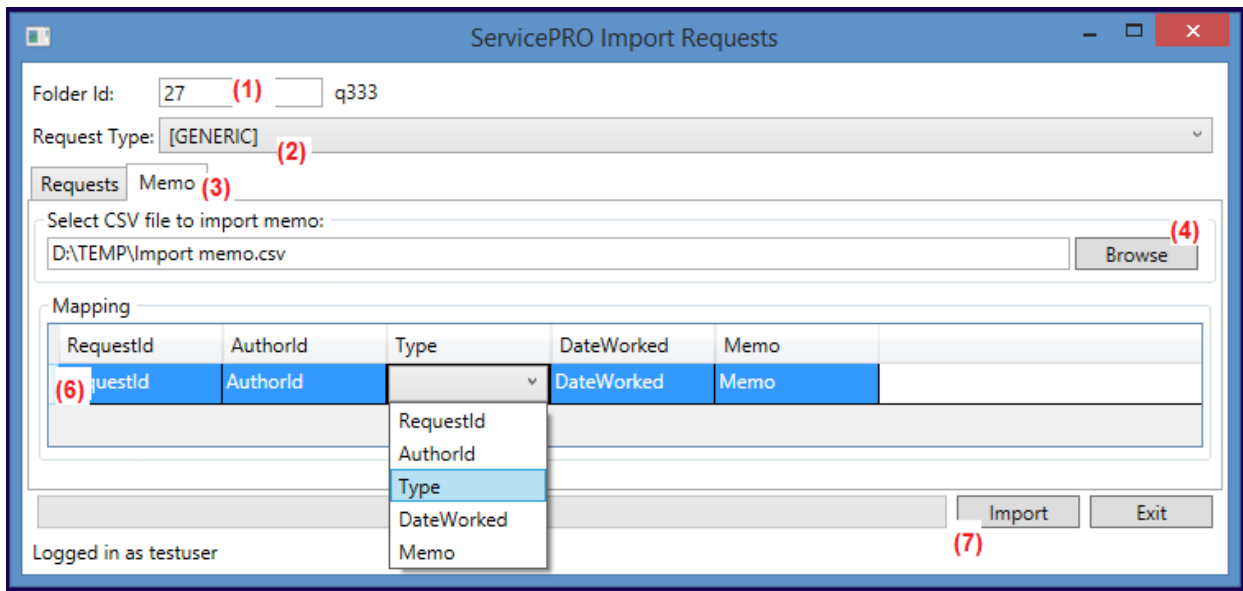
Select CSV file to import request:

Mapping

RequestId	Title	RequesterId	TimeLogged	Priority	Response SLA	Resolution SLA
requestid	summary	userid		priority		

Logged in as SDKAdmin

Memo Tab Selected



ServicePRO Import Requests

Folder Id: q333

Request Type: [GENERIC]

Requests Memo

Select CSV file to import memo:

Mapping

RequestId	AuthorId	Type	DateWorked	Memo
requestid	AuthorId	Type	DateWorked	Memo

Logged in as testuser

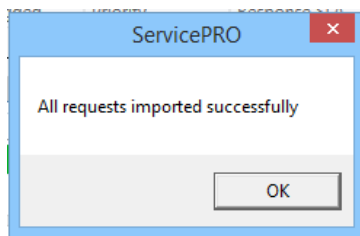
The following are the main parts of the open source Service Requests Import utility User Interface (reference the above images).

1. **Folder Id input** – This is the ID of the Queue folder to where the request will be moved to after creation. To find the id run the following sql statement on your ServicePRO HS2000CS database:


```
select * from tblqueue where QueueType in (2,8)
```

2. **Service request type selection** – This will depend on your ServicePRO database. Selecting a custom request type will also allow you to map values to custom fields on the request.
3. **Requests and Memo CSV import selection** – You may import request data only OR request PLUS memo data, although memo data is not mandatory. If a Memo CSV is not selected, a default memo will be entered for newly created requests.
4. **Browse** – Browse and select a comma separated values (CSV) file that contains the data to import here. Please note that the data file needs to include a header row containing Column/Field names to facilitate field mapping in Step 5 (Request field mapping) and Step 6 (Memo field mapping).
5. **Mapping (Requests)** – Once a valid CSV file is selected for Requests, the field headers in Mapping Grid should be mapped to the corresponding columns in the CSV file.
*[Details on field mapping are given in **Fields Mappings for CSV file Data**]*
6. **Mapping (Memo)** – [Not Mandatory] Once a valid CSV file is selected for Memos, the field headers in Mapping Grid should be mapped to the corresponding columns in the CSV file.
*[Details on field mapping are given in **Fields Mappings for CSV file Data**]*
7. **Import** – Import the data and create new requests. If you have not specified a memo CSV, the utility will prompt if you want to import with the default memo. Click Yes to continue.

After import finishes, there will be a success prompt shown.



3. Module Bug Fixes

Service Requests, Project Requests, Quick Requests, Workspace & other Views

- Users can customize their “In Service” view
- Custom fields with no permissions to update or view behave as expected when creating Project requests or regular service requests.
- Users able to make changes to multiple project tasks in the same session
- Trace “Closed” is included if user assigns to self and closes the request in one step.
- Workspace (Dispatch) refreshes as expected
- Requester Company or OU link in Activity Stream/Request properties behaves as expected
- Issue with recursive project reference is now fixed
- Sorting by any column now behaves correctly in Advanced Search Results Window.

Email Inbox

- Launching and working with email inbox behaves correctly using IBM Domino server.

ServicePRO Objects

- Removing roles and saving changes in RBAC is no longer throwing exception
- Moving queue folders from one location to another in organizational hierarchy is no longer throwing exception
- When creating a new announcement, audience field now defaults to privileged users
- Users can now print PO details
- Changing search criteria while searching for an asset is now bringing results as expected

Administration / Configuration

- In priority escalation, adding queue folders behaves as expected
- SLA does not allow resolution time to be less than the response time

Assets/Configuration

- In Asset Explorer, viewing asset properties is displayed in the correct font size.
- Assets are sorted alphabetically in Discovered Hardware
- Right clicking on existing discovery schedule shows the correct labels
- In Asset Explorer, inventory node loads as expected
- Performance improvements in loading the Discovered hardware tree
- Discovered hardware behaves as expected when associating with assets
- Fields can be edited when dragging more than one hardware to create assets
- Discovered item queries saved with “Total Memory (RAM)” field from previous versions behaves correctly
- When configuring discovery schedules, IP range values show correctly in the UI after saving

Purchasing

- The character length of PO number is now restricted to 20 characters
- Vendors show correctly for products assigned to more than one vendor
- Purchase order behaves as expected in Firefox browser

AD Authentication

- Request Details and Approval link behaves as expected when accessed by a support rep using AD authentication

Query Designer

- When exporting to excel, the issue with time closed for open requests is now fixed
- First memo logged via end user portal shows correctly in query results
- Order of fields does not change in query results when “ask for criteria” is used
- “Request Originated By” criteria shows correct results

Reports, Charts, Dashboard

- Correct report is generated and emailed when manually adding a grouping to a customized Overview report
- Removing a grouping from the custom report designer removes it from the report layout
- Grouping tab is displayed correctly in different resolutions
- PO Detail report is properly formatting the vendor address
- Users can now edit/preview Company and OU listing reports if there is a filter on “Type”

Object Designer / Custom Fields Editor

- Creating an alphanumeric dropdown without specifying a choice/item behaves as expected
- Users can cancel out of a look up or dropdown field
- Fields set as “Required” and given a default value behaves as expected

Quick Request Templates

- Message is shown when user tries to add a quick request template with duplicate name

Rule Designer & Rule Service

- Rule end date behaves correctly when business rule schedule is modified
- Status shows correctly when using request status variable in business rule email template

Starwatch Service

- Request priority variable shows correctly in emails
- Starwatch behaves as expected when sending out memos from business rules
- .WAV attachments are attached as expected
- Emails are sent to CC recipients as expected

Import Utility

- While importing users, Utility does not reset passwords to default value for users already in the database.

Others [Application Level]

- Automated shut down sequence behaves as expected