

## What's New?

### Efficiency

#### 1. Split and create new request ticket

If an existing ticket thread seems to cover more than one issue and needs to be segregated into individual request tickets, a technician can now split a ticket by using the Split Ticket feature. Consider the following scenario:

A particular customer has initiated a support based ticket. The ticket is followed by a lengthy update thread explaining the cause and actions required to resolve the issue. On the same ticket, the sales department added some comments that ideally should be treated as a new ticket. Technician can now ensure that this most recent update is *split* into a completely new ticket, and assigned to a staff member in the sales department. This is in line with help desk best practices, since each ticket thread specifically relates to a single issue.

You can access the feature by going into ticket details. Go to the Request > All Open Request. On the list page of request tickets, click on the name of the ticket to go into its details. On details page, click on the vertical three dots at top right corner and choose 'Split'. A 'create request' popup will open up with pre-filled all basic details from the existing ticket.

#### 2. Export support for request, problem, change, requester and technician search result

If technician wants to share details of the some of the request, problem or changes to other team members for further discussion. Instead of manually preparing the details, this functionality will enable the user to filter out required entities (request/problem/change) from GUI and directly send these details in an email to the members.

You can access the feature by going into ticket details. Go to the Request > All Open Request (Same for problem, change, technicians and requesters). Select the tickets/records that you want to export. Click on the vertical three dots on top right corner. Select 'Export'. A popup will open up for you to select the export file type and the fields.

#### 3. Display columns selection support for request, problem and change search result as per user preference

By default product provides set of fields to be visible in the listing view of the request/problem/change modules. For further information you can go into the details view of each entity. As per business need there can be some important fields that user may need to view on the listing page. This feature will enable users to customize column list as per his/her need, so that he can perform daily operations efficiently.

You can access the feature on request, problem and change list page. Toggle the 'list' view of the tickets. A settings icon will appear. Click on the icon and select/unselect

the fields that you want to show/hide on list page. The view is user specific. This means, you'll see your choice of fields and your friend will see his choice of fields.

#### **4. Enabling custom fields support in request, problem and change templates.**

You can use ticket templates to quickly create tickets by using predefined values, which eliminates repetitive tasks in the process. Till now only predefined system fields were supported for template creation, but now support of custom field is also enabled.

You can access the feature for request, problem and change templates. Go to Admin > Request Custom Fields (Same for problem and change). Add the custom fields that you want to include in template. These fields will reflect while creating a new template.

#### **5. Searchable drop down support for technician group and location.**

This feature will enable easy searching of specific location or technician group in the system in case number of locations or technician groups are very large.

You can access the feature while creating a new ticket. The feature is available at all places that uses location and technician group drop-down. For example, go to Quick Actions > Create Request. In 'create request' popup, click on the drop-down of location. In the drop-down, you can search a location by typing the name.

#### **6. Email based approval – Approval/Rejection link on email.**

This feature enables users to approve or reject the approvals via email itself. Users can directly respond to the pending approval without logging into the application from the notification email that users receive. This email contains key information about the request pulled from the notification message with hyperlinks to approve or reject.

You can access this feature from email. Go to your email and open an approve/reject email received from ITSM. Click on the 'Approve' or 'Reject' link to approve/reject the request.

## **Flexibility**

#### **1. Dependent custom field support for request, problem and change.**

Dependent custom field, which lets you create a three-level hierarchy that is dependent on the user's choice in the previous level. In a way it helps administrator to configure or impose rules on the field selection that are dependent on each other. Using dynamic sections in your ticket form will improve the structure and help users filter tickets easily and resolve them faster.

You can access the feature from Admin > Request custom fields (Same for all custom fields except 'user custom fields'). You can add a 'dependent field' in the form. Add a name to the field and click save. Then click on the name of the field. A second field will open up as the second level hierarchy. Similarly, you can add the 3<sup>rd</sup> level hierarchy.

#### **2. Automation Workflow: "Contains" operator support for category attribute.**

This improvement in qualification will be helpful in reducing the number of workflow configuration that are required to be configured in the system. Till now only “equals” operator was supported for category attribute.

You can access the feature from Admin > Workflow. While creating a workflow condition, whenever you select a ‘Category’, you can use ‘contains’ parameter for evaluation.

### **3. Allowing operations on assigned request to technician having “Restricted Access”.**

This access change will enable technicians having “Restricted Access” to perform an operation on the requests assigned to him. Now assignment of requests to such technicians will be possible also.

You can access the feature by assigning a ticket to a technician who has restricted feature. The technician will be able to perform all operations like a normal function.

### **4. LDAP Integration: “User Group” import support.**

This improvement in LDAP integration will enable system to import users of the specified user groups along with the other users that are available under the specified base DN.

You can access the feature from Admin > LDAP Configurations > Add LDAP Configurations. You can add the name of the group in group base field.

### **5. Support of adding custom request source.**

As a part of this enhancement, system now supports configuration of additional custom request source as per business need. In the integration REST API, at the time of creation of request an optional parameter to specify request source is also provided. In addition to this support of “source” field in the workflow qualification for Request “is Create” event is provided.

You can access the feature from Admin > Request Management > Source. You can add new custom source values.

### **6. Create Request Form - system fields display customization support**

Application supports display control parameters customization for custom fields such as “marking field as mandatory”, “Field to be displayed on requester portal”. Now this new enhancement will enable display control customization for following system fields: Location, Technician Group, Department and Description.

You can access the feature from Admin > Request Management > Request Custom Fields. On this page, you can select what fields are mandatory. Also, two new fields: ‘Description’ and ‘Location’ are added to show for customer support center.

**Note:** In Customer Portal Preference configuration support “Allow Requester to Report with Location” parameter is removed.

### **7. Search filter – support of created date, resolved date and close date parameter**

In search filter of the request, problem and change along with other parameters support of created date, resolved date and close date fields is added. For these date

parameters support of “function as value” such as “Today”, “Yesterday”, “This Week”, “This Month”, “Last 24 Hours” is added. Support of such predefined function will reduce overhead of changing search query every time.

You can access this feature from Request > All Open Requests (Same for problem and change tickets). On list page, use the search query: ‘created date’, ‘resolved date’ or ‘closed date’. On selecting the query, you will option to select dates.

#### **8. Contract Management: Display restrictions - Technician Group based restriction**

As per business need, there can be requirement of restricting visibility of some of the important contracts to limited users. With this improvement, by associating Technician Group with contract, visibility of that particular contract can be restricted to a particular group of users. Other users that are not in that technician group will not be able to view/search such contracts.

You can access this feature from Contract Management > All open contracts. Edit a contract. In ‘Technician Group’, select a group. Only the people of this group can access and manage the contract.

#### **9. Asset Management: Alert notification support on software uninstallation**

This feature will enable alert generation, in case selected software is uninstalled from any pre-discovered hardware asset, to pre-subscribed users. During change log scanning if any uninstalled software found than respective notification will be sent. System provides predefined email template for this event, which can be customized as per client needs.

You can make enable/disable and make changes in the notification email from Admin > Automation > Email Notifications. In ‘Asset’, select ‘Notify Subscriber When Software UnInstallation Found’. Enable/disable the email notification or edit the content of the email.

## **Stability**

#### **1. Purging support of archived request.**

This feature will enable users to permanently delete archived requests available in the system. This feature is particularly useful to avoid performance related problem when large number of requests are managed by the system.

You can access the feature from Request > All Open Requests. On top right corner, click on the vertical three dots and select ‘View Archived Requests’. On the archived requests page, select the requests that you want to delete. Click on the delete button to delete requests.

#### **2. Maintaining same communication email thread in case of change request category operation.**

Prior to this change for “Email to Ticket” cases whenever a technician change category of ticket from “Request” to “Incident” or vice versa then email thread communication was getting broken due to new sequence number generation. Now

as a part of this enhancement a common suffix sequence number will be maintained in the system for “Incident” and “Request”. In case of change category only prefix will be updated and entire ticket identification process will consider suffix sequence number only.

For example, First request is created with SR-1 number, Second with SR-2 and now if incident is created then its number will be INC-3 not INC-1. In case of change category operation of SR-2 from Request to Incident, its number will be changed from SR-2 to INC-2.

Note: For older pending tickets if change category is changed then new sequence number will be generated.

### **3. Deprecating support of “All Requester Group” from notification related operations.**

Support of “All Requester Group” is removed from the notification related functionality. Main purpose of introducing this change in the system is to avoid misconfiguration, which may lead to large number of notifications generated by the system and cause an overload on the client email server. At following places on the GUI support of “All Requester Group” is removed.

Manual Approval, Auto Approval Workflow, Workflow - Add Watcher Action, Scenario - Add Watcher Action, Add Watcher, Send notification