



# Alemba Service Manager v10.1.20

Release Notes

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# About this guide

These release notes contain instruction and information on the features and upgrades that are incorporated in the current release of Alemba Service Manager™ version 10.1.20.

## Intended Audience

This guide is written for the analysts and system administrators responsible for the upgrade and maintenance of Alemba Service Manager™.





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## Standards and Conventions

The following standards and conventions are used throughout the document:

	Prerequisites, including security rights and access you may need prior to completing the task. Prerequisites are also highlighted in a shaded box.
	Information related to the current topic that may be of particular interest/significance. Notes are also highlighted in a shaded box.
	Examples. These are also highlighted in a shaded box.
	Warnings. These are also highlighted in a shaded box.
<b>Field Name</b>	Fields are highlighted in bold text.

## Version Details

The table below contains version details for this document.

Version No.	Date	Details
1.0	02 March 2020	New features and changes for ASM v10.1.20 release

# Introducing ASM v10.1.20

This release contains new feature functionality for:

- ASM Core
- Self Service Portal
- Nano

## Installation

For installation instructions, please see the following publication:

- ASM v10.1 Prerequisites and Installation Guide

## Replicated Databases

If you replicate the database, you must apply any database schema changes and new indexes to all databases.

## Major and minor release conventions

Alemba® uses the following conventions for each release:

- Major release: denoted by a two-digit number, for example 10.3 These contain feature changes and bug fixes
- Minor release: denoted by a three-digit number, for example 10.3.5 These contain maintenance fixes to the major release

Release Notes are created for each major release, and the document is subsequently updated with the minor release changes.

# New Features and Changes in Alemba Service Manager™ v10.1

New features and improvements are being introduced all the time to make your system better, faster and easier to use.

## 23 New Features

- **Multi Language 2.0**

Full translation of the portal is now supported, including text input in the user's native language, translation of search results and translation of incoming and outgoing email – it's full on Babel Fish mode! Localization is now significantly faster in the portal.

Databases must be configured to use Unicode to support all multi language features. An SQL script is available to convert the schema to Unicode on request. For more information, see [page 10](#).

- **Risk Calculator**

Custom lists added to the Core Request screen now have a Score column. Request Risks have a "From" and "To" value. When a Request is updated via Core, the Risk Calculator will select a Request Risk based on the total score of all custom list values. For more information, see [page 11](#).

- **Action Approvals in Portal Delegation is now hidden**

This checkbox is not relevant to portal delegation and was causing confusion with new users. The checkbox does still apply to Analyst delegation and is visible in the analyst delegation screen in Core.

- **Portal Search Fields can now be set to display as a dropdown**

The dropdown will load the first page of search results (page size is configurable via the Search Field configuration screen). When in dropdown mode and when translation is enabled, Names are translated on demand to the users chosen language

- **Added a setting to Enabled the Advanced Search in Portal Search Fields**

The advanced search (the spy glass) will always be displayed in portal search fields when this setting is enabled. This setting is in the portal preview features section.

- **Show all tickets for my organization in Core searches**

When searching for tickets the analyst can see tickets for their organization regardless of which partition the ticket is in. Controlled by a Security Role settings. For more information, see [page 17](#).

- **Call Suspend Default Date**

When suspending a call, the Date field defaults to  $n$  days in the future, where  $n$  is a number defined in System Admin; can be overwritten by the suspending analyst. For more information, see [page 18](#).

- **Auto Unsuspend Calls and Start SLA Clock on Action**

Suspended calls are automatically unsuspended when they're updated. Suspended SLA clocks on calls are automatically restarted when the call is updated. For more information, see [page 19](#).

- **Search Text in Attachments**

Text is searchable in documents attached to calls, requests, and knowledge articles.

Applies to file types: *Word, Excel, PowerPoint, Outlook, Visio, Project, MS One Note* and *PDF*

- This does work for all supported versions of SQL Server but we are still working to confirm support for docx and other office formats in SQL Server on AWS. For more information, see [page 21](#).

- **Add Attachment Without Action**

Calls, requests and tasks allow Analysts to Add Attachments without taking action. Permission is controlled by Security Role setting. For more information, see [page 22](#).

- **Request Risk Assessment Derivation**

Ability to set a Risk Assessment based on selected values for Request Impact and Request Complexity. Similar to Call Priority Derivation. This is similar to the Risk Calculator but it's easier to set up and we think it is a worthwhile addition. For more information, see [page 23](#).

- **Propagate Emails and Attachments to Child Calls**

When there are linked child calls, the parent call can be used to send emails to users of those child calls and attach objects to them. For more information, see [page 26](#).

- **Assign Call Back to Forwarding Group**

After  $n$  days, forwarded calls are automatically forwarded back to the Forwarding Group of the call; where  $n$  is a value defined on the Forward Internal screen. For more information, see [page 28](#).



- **Search Fields for Call, Request and Knowledge**

Enables fields from these entities to be added to the screen as read-only linked fields. For more information, see [page 29](#).

- **Self-service Portal Request Search Enhancement**

Request Search Criteria page has criteria to search for requests that are “Open”, “Resolved < 1 week”, and “Resolved < 4 weeks”. For more information, see [page 30](#).

- **Store Local Password for AD Integrated Accounts**

A local password can be stored on person records that are integrated with Active Directory and use Windows Authentication to log in. This simplifies use of the classic API where windows authentication is configured.

- **Improvements to Caching in Core, Portal and Nano**

The app should now clear the browser cache automatically whenever a new version of ASM is installed (You may need to reload the page on first load after upgrading to 10.1.20). This change should also boost performance, particularly on slower networks.

- It won't work in IE and requires SSL.

- **Option to link Bulletins to Organizations using stakeholder links**

When configured, linked bulletins will only display for the current users Organization.

- **Outbound Actions for Azure DevOps Connector**

- **Blackberry UEM CMDB Connector (alpha)**

- **Self-service Portal Call Summary screen is now designable**

- **Option to hide the bulletin widget if there is no news**

- **Option to hide the Major Incidents widget if there are no incidents**

## 25 Resolved Issues

- Open/Resolved and Open/Unresolved Calls can now be reopened from the Self-service Portal.
- Resolved a problem with designing some Portal screens ('add note' 'add note out', 'add object' 'add object out').
- Resolved an issue with mandatory rules on the call description field.
- Resolved an issue with alphabetic sorting of the description in search results.
- Improved drag and drop of tab sections in the designer for Core screens.
- Resolved an issue that made it impossible to remove OOB fields from portal tables.
- Resolved an issue with portal knowledge matching when there is an apostrophe present.
- The Nano date picker will no longer disappear when using the up/down arrow.
- Core knowledge search will now show results as expected.
- Call Explorer Favourites is now accessible.
- Resolved an issue with filter rules on mandatory multi QD fields in Core.
- Resolved an issue with filter rules on multi QD fields in the Portal.
- Resolved a condition that could cause a deadlock when processing API queries. This would lead to persistently high CPU usage on the web server.
- Resolved an issue with logout from Core. Logout didn't always terminate the session.
- Years greater than '30 will now default to the 21<sup>st</sup> century rather than the 20<sup>th</sup> when using the portal date picker.
- Pressing enter in Search Fields on the Portal search criteria page will no longer open the advanced search for that field.
- Fixed an error that occurred at the end of the API install process in some environments.
- Plus other reported issues we have confirmed to be fixed since they were reported.

# Multi Language 2.0

Alemba Service Manager now supports full translation of the self-service portal into any language. The new multi-lingual feature is perfect for global service desk teams who need to support customers in multiple languages.

## Key Features

- **Translate labels in the self-service portal into any language.**

Your customers can interact with the self-service interface in the language of their choice.

- Supports text input in the user's native language.
- Translate search results and call descriptions into any language.

- **Dynamic translation of content.**

For example, when logging a call on the self-service portal:

- The user enters the call description in Japanese on the self-service portal.
- It appears in English to the analyst in Alemba Service Manager Core.
- The analyst then types an action into the call in English.
- When the user views this action in the self-service portal it will appear in Japanese.

- **Translation of incoming and outgoing emails.**

Emails are dynamically translated into the user's preferred language. For example:

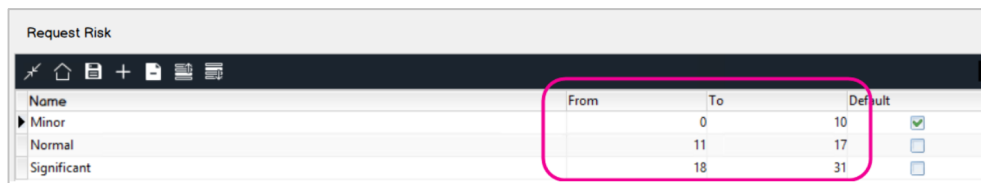
- A user logs a new call by email in the self-service portal. The email is written in Japanese.
- The assigned analyst receives the email translated into English.
- The analyst replies to the email in English.
- The user will receive the response email translated into Japanese.

# Risk Calculator

The Risk Calculator will allow users to configure their Task & Request screens to have a set of risk assessment questions with a list of weighted answers. The total value of the answers provided will be assessed against a set of threshold values to display a Risk Rating value. The ability to add questions and answers to the Task & Request screens are part of standard functionality so the feature allows a Customer to set a value against the answers in Designer and configure the threshold values.

## Risk Thresholds

The **Request Risks** screen allow for a threshold value to be assigned against each risk entry:



Name	From	To	Default
Minor	0	10	<input checked="" type="checkbox"/>
Normal	11	17	<input type="checkbox"/>
Significant	18	31	<input type="checkbox"/>

### Threshold value validation

Upon saving the screen the system will validate the threshold values entered and prevent saving if there is:

1. A gap between the threshold values, i.e. 0 - 10 and 12 - 15 – value 11 is not captured in either threshold.
2. An overlap between the threshold values, i.e. 0-10 and 9-15 – values 9 and 10 are captured in both threshold ranges.

The system should display a warning message to the user indicating the issue and provide an OK option that will return the user to the unsaved Request Risks screen.

## List Values

In Designer the ability to add a custom list to a custom drop-down field allows for a 'score' to be set against each item in the list:

1. Add a **Score** column to the **List Details** screen accessed by:  
*Designer > Task > Open Task Screen > Add a Field, Create New > Drop Down > Create List.*
  - a. The system allows duplicate numeric values to cater for equally weighted answers.
  - b. Users should only be able to enter whole positive numbers
  - c. The score column should not be mandatory – to allow for a simple 'unscored' list to be entered and used. However, should a list be created with a score against any of the values, the system should assume it is a weighted list and set any blank values to zero-0 for the purposes of calculation.



If the field settings for this field have **Display Blank Option** set to **No**, then the top item in the list is shown in the field when the screen loads. In the example image above it would be 'High'.

## Request Risk

1. The **Request Risk [RISK\_REF]** field properties in Designer include a new checkbox option called 'Calculate Value' with an associated pop-up screen accessed via a button adjacent to the checkbox – see image below.

2. Clicking the [...] button will open a window that lists all of the custom fields that have had values assigned to the list items – for this screen.
3. The analyst should select the fields that should be included in the threshold calculation at run time.
4. Clicking **OK** will close the window.
5. In order for the Request Risk field to be populated based on a calculated value, the checkbox must be selected.
6. If this checkbox is selected then the Risk field should be read-only.

Name	
Custom Answer 1	<input checked="" type="checkbox"/>
Custom Answer 2	<input checked="" type="checkbox"/>
Custom Answer 3	<input type="checkbox"/>
Custom Answer 4	<input checked="" type="checkbox"/>

### Run Time Behaviour:

1. At run-time when a Request is created with a Request Risk on a Task that has Calculate Value selected in the field settings, the Risk field should be read-only and display the default value that is selected in the Request Risk Admin screen.
2. When any of the fields selected in the Calculate Value window are updated within a Task on the Request, the system will ADD the selected values together to derive an overall score and match that to the Threshold values defined to display the associated Risk Value.
3. When the task is marked as Complete this activity will be written into the relevant Task and Request history, e.g. Task 12345 has updated the Risk from **Minor** to **Normal**.
4. Should a subsequent task also contain a risk assessment, the Risk field on the request will be updated with the new value and an entry written to the Request history to reflect the change.
  - a. Should a subsequent risk assessment not actually change the risk level, the activity will still be written to the Request History to reflect that e.g. Task 12345 has updated the Risk from **Minor** to **Minor**.

## Calculated Value

The Calculated Value is a total score of the selected values in any custom valued list fields that have been added to the screen – and selected in the Calculated Value window for the Risk field.

1. The default value will be zero - 0
2. At run-time when an option is selected in one of the 'answer' fields the 'score' associated with that option is added to the Calculated Value.
3. When an option is selected in another 'answer' field the 'score' of that selection will be added to the Calculated Value.
4. Should an option selected in an 'answer' field be changed the Calculated Value should be recalculated to reflect the 'score' associated with the newly selected value.

For example, three list value fields have been added to the Task Screen with the following selections:

Question	List Value Options	Selection
Question 1	Low (1), Medium (2), High (3)	Medium (2)
Question 2	Low (0), Medium (2), High (4)	High (4)
Question 3	Low (0), Medium (4), High (6)	High (6)
Calculated Value		12

With the following **Request Risk Rating** thresholds set up in the system, a **Calculated Value** of 10 would mean the **Risk Rating** field should display **Normal**.

Name	From	To
Minor	0	10
Normal	11	18
Significant	19	25

Should the configuration allow for a calculated value to be higher than that allowed for in the thresholds the 'highest' threshold value should be used.

For example, the Request Risks thresholds configured are:

Total Score	Risk Rating
0-10	Minor
11-18	Normal
19-25	Significant

The selections made on the task screen at run time are:

Question	Options	Selection
Question 1	Low (1), Medium (2), High (3)	Medium (2)
Question 2	Low (0), Medium (2), High (4)	High (4)
Question 3	Low (0), Medium (4), High (8)	Medium (4)
Question 4	Low (1), Medium (2), High (3)	High (3)
Question 5	Low (0), Medium (4), High (8)	High (8)
Question 6	Low (0), Medium (4), High (8)	High (8)
<b>Calculated Value</b>		29

The **Calculated Value** of 29 is larger than the highest threshold value allows, the system should apply the value that corresponds with the highest value allowed. In the example, the Request Risk will be set to SIGNIFICANT.

## Configuration

The configuration of the screens is part of standard functionality but in order for the feature to work as expected it is important to configure the system correctly.

1. There needs to be at least one drop-down field with values assigned to each list item.
2. The Risk Assessment answer fields should all be mandatory. Any not completed will have a default value of zero.
3. The Request Risk field should be added to the Task Screen that will be used for the Risk Assessment.
4. The Request Risk field settings should have the Calculated Value checkbox selected.



5. There should be at least one custom value field selected in the Calculated Value window.
6. Make sure that the Risk Thresholds added to the Request Risk screen will cover the set of values available for selection in the answer fields.



Please Note: If the threshold values are updated in the Request Risk Admin screen, the change will only impact future calculations and will not trigger previous risk values to be recalculated.

# Organization Visibility of Tickets Across Partitions

When searching for tickets the analyst can see tickets for their organization regardless of which partition the ticket is in. Controlled by a Security Role settings.

## System Admin:

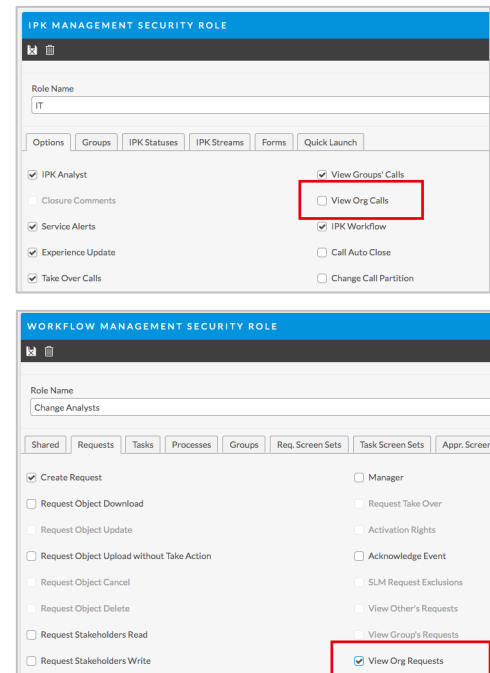
- New checkbox: “Review Org Calls” in IPK Security Roles
- New checkbox: “Review Org Tasks” in Workflow Security Roles
- New checkbox: “Review Org Requests” in Workflow Security Roles

## Search behaviour:

- Search results return items across all partitions, including those they cannot access, if the item has the same Organization as the analyst
- Applies when: Analyst has the relevant security role setting(s) enabled AND the work item has the same Organization as the analyst
- Applies to: **Call Search, Request Search, Task Search, Quick Search**

## Actions available on work items:

- Analysts can perform actions on work items in partitions they cannot access if the item has the same Organization as the analyst
- Applies when: Analyst has the relevant security role setting(s) enabled AND the work item has the same Organization as the analyst
- Actions available: **Review details, Add Notes, Add Objects, View History, View Objects**
- Actions not available: Take Action or Take Over the work item, Edit details of the work item, Delete Objects

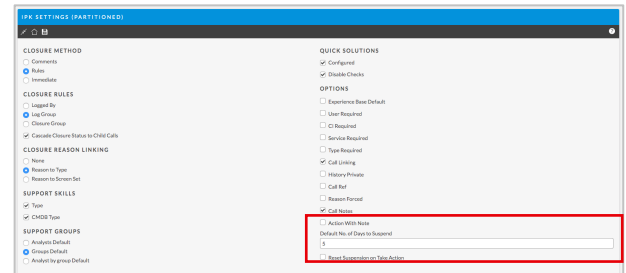


# Call Suspend Default Date

When suspending a call, the Date field defaults to  $n$  days in the future, where  $n$  is a number defined in System Admin; can be overwritten by the suspending analyst.

## System Admin

- Applies to: IPK Settings (Partitioned) screen
- New setting: “Default No. of Days to Suspend”
  - Field type: Numeric
  - Default value: 5.
  - Field accepts numbers from (zero) 0 to 99
- Configurable per partition (standard behaviour for that screen)
- When field value is 1 or higher: call suspend date defaults to current date + value entered in this field
- When field value is 0 (zero): call suspend date defaults to current date (reflecting standard behaviour).

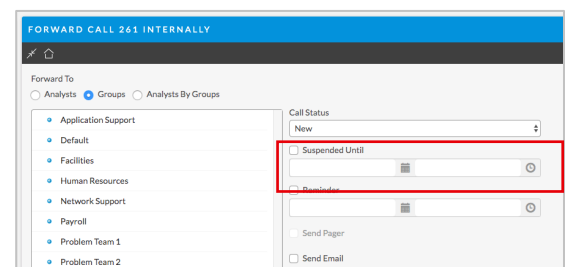


## Field Label Changes

- Change the Suspend field label to “Suspended Until”
- Applies to: Call Forward Internal screen, Call Defer screen

## Runtime - when suspending a call:

- Applies to: Call Forward, Call Defer
- When analyst ticks the Suspend Until checkbox, the date field defaults to  $n$  days in the future, where  $n$  is:
  - Value from Sys Admin field “Default No. of Days”
  - As defined for the partition of the call
- Analyst can select a different date
- Thereafter all suspension behaviour reflects standard system behaviour

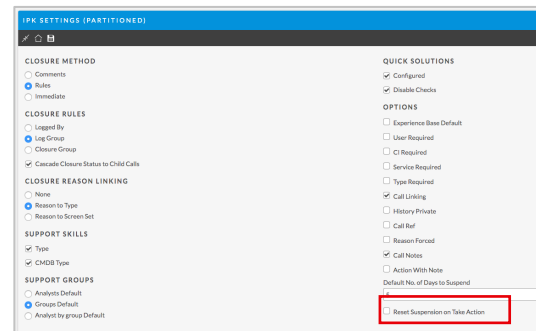


# Auto Unsuspend Calls and Start SLA Clock on Action

Suspended calls are automatically unsuspended when they're updated. Suspended SLA clocks on calls are automatically restarted when the call is updated.

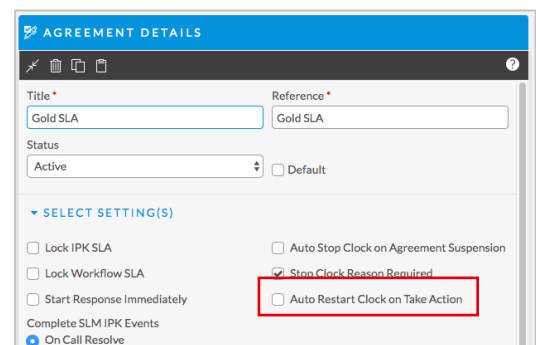
## System Admin

- Applies to: IPK Settings (Partitioned) screen
- New checkbox: "Reset Suspension on Take Action"
  - Location: under the Options section
  - Default: unselected
- Configurable per partition (standard behaviour for that screen)



## Agreement Details screen

- Applies to: SLA agreements
- New checkbox: "Auto Restart Clock on Take Action"
  - Location: in the Select Settings section
  - Default: unselected
- Applies only to calls with that SLA
- Does not apply to requests



## Runtime – “Reset Suspension on Take Action”:

- Applies when:
  - Current analyst updates Actions & Solutions
  - Another analyst Takes Action
- When disabled: standard system behaviour - call is not automatically unsuspended
- When enabled, and a suspended call is updated:
  - Call is automatically unsuspended

- SLA on call is automatically started if:
  - Call has SLA; and
  - SLA was suspended due to standard SLA setting “Auto Stop Clock when Agreement Suspended”
  - Regardless of new SLA setting “Auto Restart Clock on Take Action”

## Runtime - “Auto Restart Clock on Take Action”:

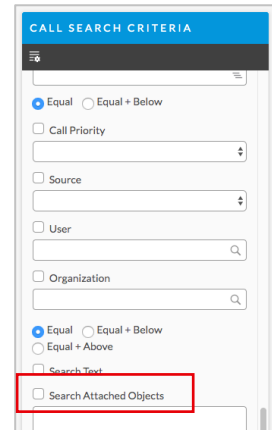
- Applies when:
  - Current analyst updates Actions & Solutions
  - Another analyst Takes Action
- When disabled: standard system behaviour – the SLA clock does not automatically start
  - *Exception:* scenario described in 3.3 above
- When enabled, and a call is updated that has a suspended SLA: SLA is automatically started.

# Search Text in Attachments

Text is searchable in objects attached to calls, requests, and knowledge articles.

## Search screens

- Applies to:
  - Call Search - criteria
  - Request Search - criteria
  - Knowledge Search - criteria
- New checkbox: “Search Attached Objects”
- Location: with “Search Text” checkbox



## Runtime - when “Search Attached Objects” is selected:

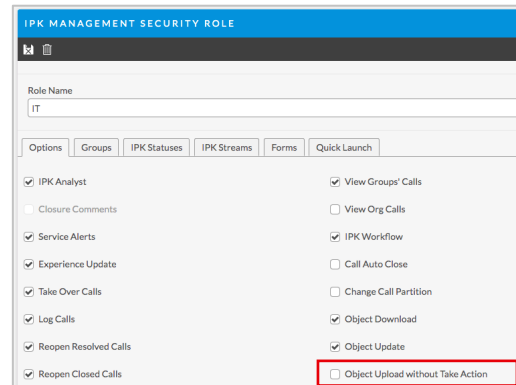
- Searches for matching text within files attached to the call, request, or knowledge article
- Applies to file types:
  - MS Word
  - MS Excel
  - MS PowerPoint
  - MS Outlook
  - MS Visio
  - MS Project
  - MS One Note
  - PDF
- Uses search logic identical to “Text Search”
- Is independent of “Text Search” checkbox:
  - If “Text Search” unselected: searches only attached files
  - If “Text search” is also selected:
    - searches attached files
    - searches call/request/kb (standard behaviour)
    - returns results match either search

# Add Attachment Without Action

Calls/requests/tasks allow Analysts to Add Attachments without taking action. Permission is controlled by Security Role setting.

## System Admin

- Applies to:
  - IPK Management Security Role
  - Workflow Management Security Role
- New checkbox: “Object Upload without Take Action”
  - Default: unselected
  - Disabled when “Object Upload” is unselected



## Runtime – when new checkbox selected:

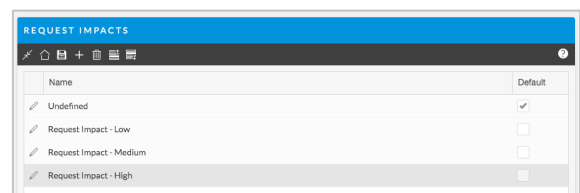
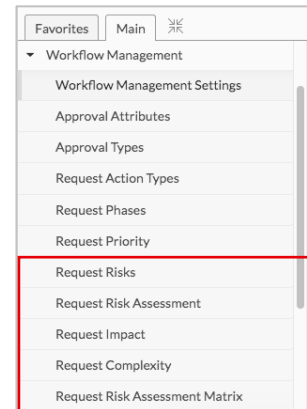
- Analyst can access the Upload functions on the Object screen without taking action on the call, request or task
- Applies to functions:
  - Upload an Image
  - Upload a File
- Version control functions are not available
- Object Delete functions are not available

# Request Risk Assessment Matrix

Ability to set a value on a custom field based on two other custom fields. Implemented through a matrix in Sys Admin, and the rules builder in Designer. Available to Search and Outstanding screens.

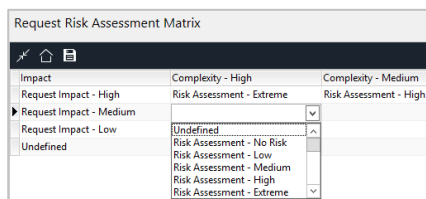
## System Admin – create values for the matrix

- New menu items and pages under Workflow Management:
  - Request Impact
  - Request Complexity
  - Request Risk Assessment
- These pages allow creation of data to be used in the matrix
- Toolbar options on page: Home, Save, Add, Delete, Move Up, Move Down
- Page structure consists of 2 columns:
  - Name (String)
  - Default (Boolean/Checkbox)



## System Admin – configure the matrix

- New menu item and page under Workflow Management: Request Risk Assessment Matrix

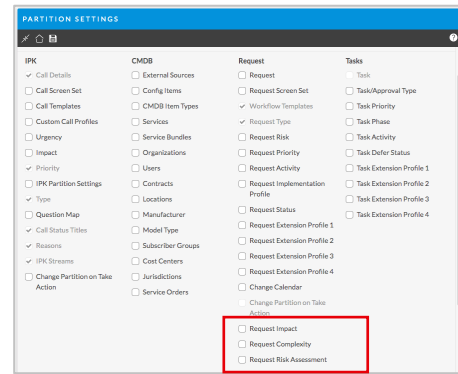


- This page enables configuration of a matrix from values in the Sys Admin pages: Request Impact, Request Complexity, and Request Risk Assessment.
- Toolbar options on page: Home, Save
- Page Structure forms a matrix with:
  - First column contains a row per value from the Request Impact page
  - Thereafter, one column per value from the Request Complexity page
  - Cells within the matrix are dropdowns displaying values from the Request Risk Assessment page.



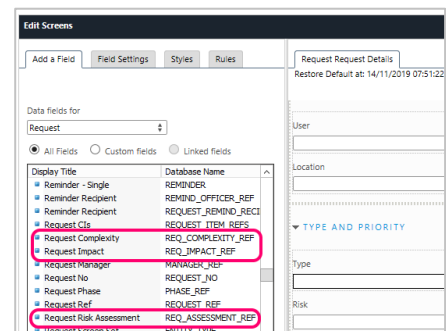
## System Admin > Partition Settings

- New checkboxes:
  - Request Impact
  - Request Complexity
  - Request Risk Assessment
- Default: unselected
- When selected, the correlating page under Workflow Management allows different settings per partition
- By partitioning all three settings, a matrix can be configured per partition.



## Designer

- New fields are available for selection:
  - Request Impact
  - Request Complexity
  - Request Risk Assessment
- Applies to:
  - Requests, Tasks, Approvals
  - Self Service Portal: Submission and Review screens
  - Core and Nano: Details screens
- The field “Request Risk Assessment”:
  - Is read-only
  - Is populated from matrix configured in Sys Admin



## Fields are available for selection in:

- Conditional Branching Tasks
- Rules Builder
- Search Criteria for:
  - Request Search
  - Task Search
- Columns on browse tables:
  - Request Search
  - Task Search
  - Requests Outstanding
  - Tasks Outstanding

# Propagate Emails and Attachments to Child Calls

When there are linked child calls, the parent call can be used to send emails to users of those child calls and attach objects to them.

## Email users of linked child calls

- Applies to: Find Recipients modal window
  - For emails from Calls
  - For recipients in To, CC, BCC
- New radio option: “Linked Calls”
  - Location: in section Find Recipients By
  - Hidden when there are no linked child calls
  - When selected: returns users from linked child calls
    - From the standard “User” field only
    - Does not support “On Behalf Of” user field
    - Open calls only
    - Child calls with no User are ignored
- New column: “Reference Number”
  - Location: in the Results browse table
  - Displays call number of the linked child call for the User returned in the results
- New column: “Record Type”
  - Location: in Results browse table
  - Displays the type of call, e.g.: Incident, Problem, etc.
- Any number of users from child calls can be recipients

**Find Recipients by**

☐ People
 ☐ Group
 ☐ Email Address
 ☒ **Linked Calls**

AND/OR Select Criteria

☒ Users
 ☒ Analysts
 ☒ External Contact

Name:  Organization:

%

Group:

☒ IPK Group
 ☐ Workflow Group

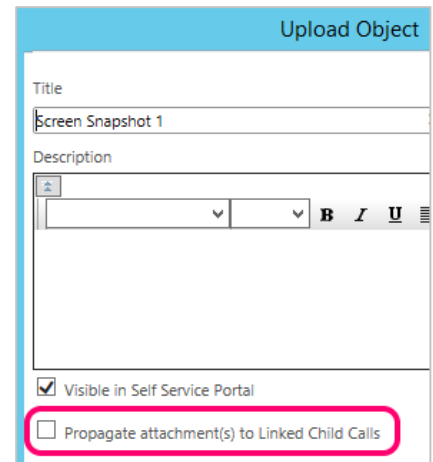
Find

**Results**

Name	Email	Organization	Reference Number	Record Type	Us
Phillip King		TELECOMM	121254	Incident	1
Robert Dang		TELECOMM	123572	Incident	1
Filippo Cacciapagl		IT INFRASTR	123597	Incident	1
Michael Ward		TELECOMM	123637	Incident	1

## Attach files to linked child calls

- Applies to:
  - Upload Object window from Call Details Toolbar
  - Upload Object window from Call explorer menu > Object
  - Upload Image window from Call explorer menu > Object
- New checkbox: “Propagate to Linked Child Calls”
  - Location: below the Description field
  - Hidden when there are no linked child calls
- When selected:
  - The object is also uploaded to all linked child calls
  - Open calls only
  - Object settings are also propagated on upload:
    - Security
    - Visible in Self Service Portal



The screenshot shows the 'Upload Object' window. It has a title bar 'Upload Object'. Below it, there is a 'Title' field with the text 'Screen Snapshot 1'. Below that is a 'Description' field with a rich text editor toolbar (bold, italic, underline, list, link, unlink, image, video, audio, document, table, table of contents, undo, redo, reset, help). Below the description field, there are two checkboxes: 'Visible in Self Service Portal' (checked) and 'Propagate attachment(s) to Linked Child Calls' (unchecked). The second checkbox is highlighted with a red rectangle.

# Assign Call Back to Forwarding Group

After  $n$  days, forwarded calls are automatically forwarded back to the Forwarding Group of the call; where  $n$  is a value defined on the Forward Internal screen.

## Call Forward Internal screen

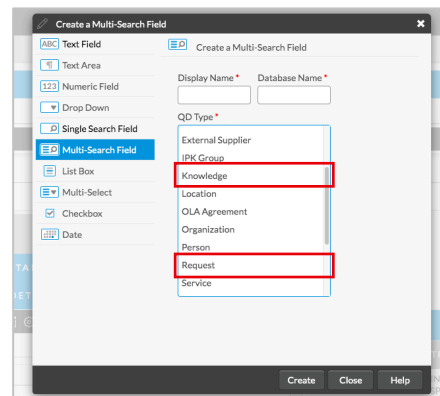
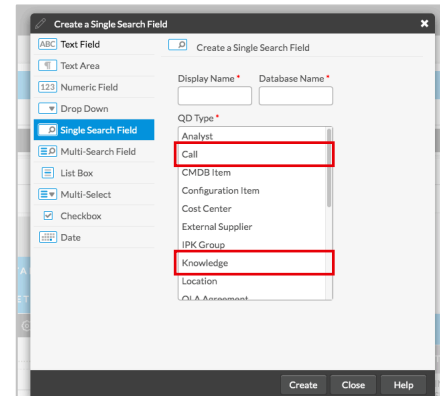
- New field: “Return if not actioned after [ ] days”
  - Consists of 2 input fields
  - 1<sup>st</sup> input field: Checkbox, unselected by default
  - 2<sup>nd</sup> input field: Numeric
    - Disabled when checkbox is unselected
    - Default value: 5
    - Accepts numbers from 0 (zero)
- When the field is selected on a forwarded call:
  - Receiving analyst has  $n$  days to take action on the call
    - Where  $n$  is the value entered in the field
  - If receiving analyst does not take action in  $n$  days, call is automatically sent back to the forwarding analyst’s group.

# Custom QD Fields for Call, Request, Knowledge

On request screens, custom QD fields can be created for request/call/KB entities, enabling fields from that entity to be added to the request screen as read-only linked fields.

## Designer

- Applies to:
  - Create Field window
  - On Request Details screens for Core
  - Single Value QD fields
  - Multiple Value QD fields
- When creating a QD field, the QD Type list includes:
  - Call
  - Knowledge
  - Request
- Enables QD fields to be created for Calls, Requests, Knowledge
- Allows 'Linked Fields' from the QD field's entity to be added to the request screen as read-only fields



## Runtime

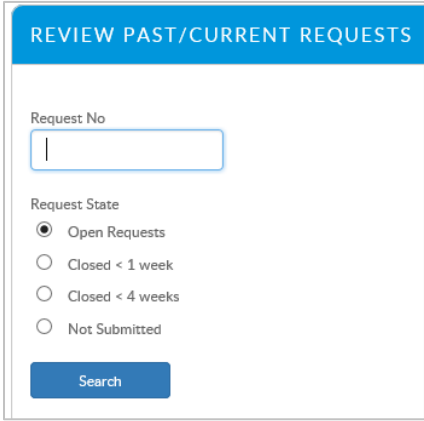
- Applies to fields on request details screens in Core:
  - Call QD field
  - Request QD field
  - Knowledge QD field
- The field is populated by typing the number of the call/request/KB and pressing Enter
- After the field is populated, if there are linked fields on the screen, they are also populated (standard system behaviour)

# Self Service Portal Request Search Enhancement

Request Search Criteria page has criteria to search for requests that are Open, Resolved < 1 week, and Resolved < 4 weeks.

## Request Search Criteria screen

- New criteria fields:
  - Radio button: “Open Requests”
  - Default: selected
  - Radio button: “Closed < 1 week”
  - Radio button: “Closed < 4 weeks”
  - Radio button: “Not Submitted”
- Runtime:
  - When “Open” selected: return open requests
  - When “Closed < 1 week” selected: return requests closed within the past week
  - When “Closed < 4 week” selected: return requests closed within the past 4 weeks
  - When “Not Submitted” selected: return requests that have not been submitted



The screenshot shows a web form titled "REVIEW PAST/CURRENT REQUESTS" in a blue header. Below the header, there is a "Request No" label followed by a text input field containing the number "1". Underneath, the "Request State" section contains four radio button options: "Open Requests" (which is selected), "Closed < 1 week", "Closed < 4 weeks", and "Not Submitted". At the bottom of the form is a blue "Search" button.