CA Nimsoft Service Desk

Consolidated Release Notes

7.0.5

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Chapter 1: Introduction to NSD 7

CA Nimsoft Service Desk 7 delivers the full power of IT service management with an intuitive user experience. Users new to CA NSD 7 find it easy to request IT Services and initiate the resolution of problems without any training. CA Nimsoft Service Desk 7 minimizes complexity and ensures faster user-adoption as it leverages attributes from social media and consumer web sites.

This document combines features from version 7.0.0 which was released in December 2012 through the most recently version, 7.0.5, which came out in April 2013. All new features from 7.0.0 through 7.0.5 are included here. They provide a consolidated view for existing customers who are preparing to move from NSD 6.x to 7.

CA Nimsoft Service Desk 7 is a service desk application, which is available as part of the CA IT Management SaaS offering. CA Nimsoft Service Desk 7 can be accessed as part of the CA IT MaaS Portal to manage the delivery of IT Services and Support. CA IT MaaS Portal provides integrated organization and user management functions.

The tenant administrator can configure and manage organizations and users from the CA IT MaaS portal. Users can then access different applications that are available as part of the SaaS offering. As a true multitenant SaaS solution, CA NSD 7 enables organizations of all kinds to achieve their service management.

CA Nimsoft Service Desk is based on ITSM Principles. End Users can reach out to the IT Service delivery teams with requests for information, access to systems or services, or to report issues.

The major changes in CA NSD 7 are:

- NSD 6 which was available as both SaaS and On-Premise solution, CA Nimsoft Service Desk 7 is a SaaS only release.
- SaaS Customers can decide when they want to move to the new platform; they are automatically upgraded to the new releases.
- The application has moved from the old platform to the CA SaaS platform. The CA IT MaaS Portal delivers an integrated, suite-like access to the IT Management SaaS offerings.
- A new user interface is available for end users, analysts, and application administrator to view and manage the application functions.
- My Service Center for end users is a simplified and consolidated workspace for frequent interactions with the application.
- CA NSD 7 introduces social collaboration features such as Board and Chat to post and view comments. Users can follow and unfollow people and objects and chat with other users within the portal.

- Organization and User Management are available through CA NSD 7. However, some of the properties that are earlier managed through the Service Desk application are now managed CA IT MaaS platform functionality.

Chapter 2: Requirements

This section provides information about the requirements and supported languages for CA Nimsoft Service Desk Releases.

Web Browser Requirements

For a list of supported operating systems and supported operating environment, refer to the Nimsoft Compatibility Support Matrix at:

http://support.nimsoft.com/downloads/doc/NSDCompatibility_SupportMatrix_current.pdf.

Supported Languages

The CA Nimsoft Service Desk application is available in these languages:

- English
- Simplified Chinese
- Japanese
- Spanish
- Brazilian Portuguese
- French
- German

Note: Some CA Nimsoft Service Desk documents are currently available only in English. All documents are offered in English to all users regardless of the locale.

Chapter 3: New and Changed Functionality

This section describes the new and changed functionalities that are introduced in CA Nimsoft Service Desk 7.

The following new and changed functionalities are offered in CA Nimsoft Service Desk.

- New User Interface for Users
- Social Collaboration Tools including Board, Chat
- Ability to Configure Role Based View to Manage Ticket Views
- Ability for Analysts to take Bulk Actions on Tickets
- Features added to enhance Usability
    - Ability for Inline Addition of Worklogs within the Ticket List
    - Ability to Include Images in Ticket Templates and Knowledge Articles
    - Ability to Create Ad-hoc Reports with Selected Attributes
    - Ability to Schedule Reports
- Ability to create contacts while logging new tickets
- Ability to create and view customized Dashboards
- Apply Ticket Templates on a New Ticket
- Export the Details for Off-Line Viewing and Sharing
    - Configuration Item to a PDF File
    - Knowledge Base Article to a PDF File
    - Ad-hoc Reports to a PDF and CSV File
    - Ticket List to a PDF and CSV File
- Inclusion of a dedicated Save button on Tickets, Configuration Items, and Knowledge Articles
- Specify an Alert Message for Tickets Requested by VIP Users
- Identify and edit Scheduled Reports
- Sort Ad-hoc Reports
- Modified ordering of actions in the Actions drop-down to display more used groups of actions first
- Ability to delete a user from the Platform
- Ability to delete subtenant from the Platform
- Inclusion of the SLA Resolution Due date and time in the ticket lists
- Inclusion of the Total Time Spent field on ticket details

- Ability to apply workflow actions before a ticket is saved
- Ability to open a Configuration Item (CI) in a new tab by double-clicking the CI in the All Configuration Items list
- Categorization moved into the About tab on all tickets
- Ability to Lock Tickets
- Handle Locked Tickets in Bulk Actions
- Control Access to Workspace for End Users
- Create Tickets from Chat
- Log Tickets Quickly Using a Scratchpad
- Update Information Using Bulk Process
- Bulk Process Data for Entities
- Modified Display of Number of Days in Standard Reports

New User Interface for Users

Affected Users: All Users

A new user interface has been introduced for an enhanced user experience. You can access various workspaces to perform the necessary tasks using the application.

Access to a workspace is through permissions to different support groups or roles.

An overview of the main workspaces that is introduced is explained here:

- **My Service Center**: for end users to view announcements, browse and use the request catalog to log requests, view and update their tickets, and use the search functionality.
- **My Tickets**: for analysts to view announcements, review ticket queues for all ticket types, and to act on tickets.
- **Request Catalog**: for users to browse, search, and request an item from the available offerings.
- **Outstanding Items**: for users to approve or review tickets and submit service feedback.
- **Configuration Management**: for creating and maintaining Configuration Items and the CMDB.

- **Knowledge Management**: for creating maintaining knowledge articles and the knowledge base.
- **My Board**: for users to post comments and interact on tickets, configurations items, and use social media.
- **Chat:** for users to chat with other one or more users who are online. Users can view the online status of other users, can add participants, or mark the chat as Private.
- **Scratchpad:** for analysts to take notes from requesters calling in for IT support or services, and quickly log a ticket using the notes.

Users can update their personal profile and system password from the Manage toolbar.

Administration can access the following administration forms from the Manage toolbar:

- Application Setup
- Workflow Tools
- Administration Utilities

Social Collaboration Tools including My Board and Chat

Affected Users: All Users

My Board is a venue for social collaborations in the portal; it is also an extended profile page for users and objects like tickets and Configuration Items (CI). My Board displays activities and contributions for the user or the object. You can microblog in My Board. You can post comments which are visible to other users who follow you and view comments from other users you are following.

The Chat tool allows you to chat with other users from any workspace. You can view the presence of other contacts online and can initiate a chat. You can also follow or unfollow other users in their organization.

Tickets and Configuration Items have their own Board, which displays posts that are related to the ticket or configuration item. You can follow or unfollow the ticket or CIs from its Board.

Ability to Configure Role Based Views to Manage Ticket Views

Affected Users: All users

The application administrator can configure role-based views to manage how users in different roles view and interact with tickets. Administrators can select ticket fields or an entire ticket section to manage how users in the related role interact with the selected fields or section.

Administrators can select a field or section and click 'Show' to make it read only. Alternatively, administrators can click 'Show' and 'Edit' to make it visible and allow editing. Unchecking the 'Show' checkbox hides the ticket fields and the ticket sections from users belonging to the selected role.

Ability for Analysts to take Bulk Actions on Tickets

Affected Users: Analysts and Administrators:

Analysts can select one or more tickets from their ticket list and can act on them. The default bulk actions available for the administrator to set up are:

- Assign to Individual
- Assign to Group
- Accept Ownership
- Delete

In addition, the administrator can configure workflow actions within 'Workflow Tools' and can mark them as 'Bulk Action' in the Ticket Type field. Access to these actions is by permissions.

Features Added to enhance Usability

Ability for Inline Addition of Worklogs within the Ticket List

Affected Users: All users

You can use the ⊞ icon to expand a ticket in the ticket list to see the worklog section. You can view previous worklogs and can add worklogs to the ticket within the ticket list.

The ability to add worklogs from the ticket list allows you to update the ticket quickly without opening it in a new window or tab.

Ability to Include Images in Ticket Templates and Knowledge Articles

The application administrator can select a relevant image when configuring ticket templates that are included in the request catalog. An image for the template makes it easy to identify the template.

Images can also be included in Knowledge Articles to provide visual information about the item.

Ability to Schedule Reports

All users can schedule reports so that they get automatically generated according to a specified schedule. The schedule can be set to run daily, weekly, or monthly. The user can set a time period to specify the duration for which the schedule is valid. They can select the time intervals for the report creation. They can select the reporting format as PDF or CSV and can decide to have the report emailed to one or more recipients. The default recipient is the logged-in user.

Ability to Create Ad-hoc Reports with Selected Attributes

Affected Users: Analysts and Administrators

Analysts and administrators can configure their own reports by selecting various attributes to be included in the report. They can create new ad-hoc reports by choosing attributes for reporting. They can also copy an existing ad-hoc report and modify selected parameters to create an ad-hoc report. They can save the ad-hoc report for future use.

Ability to Create Contacts While Logging New Tickets

Affected Users: Analysts and administrators

While logging a ticket on behalf of a person, an analyst can create a contact in CA Nimsoft Service Desk. If the name specified as Requester or Requested For does not match an existing contact record, the system prompts the analyst to create a record.

The analyst provides the required information such as First Name, Last Name, and Email ID. The caller becomes a contact with records in the system. The new contact can receive automatic and manual email notifications from the ticket. The new contact is also available for new tickets that are logged after the contact is created.

Note: The new contact exists only in the application and not on the platform. The contact is not assigned a license and cannot log in to the application. The application administrator can create a corresponding new user in the platform with the same email ID. As a result, the user can log in.

Ability to Create and View Customized Dashboards

Affected Users: Analysts and administrators

You can now view Dashboards from the reports navigation menu to get a visual representation of the trends and activities in their organization. You can view system defined charts and dashboards. With the required permission, you can also view the customized dashboards.

The application administrator can configure charts by using a defined search query to generate the desired data. The administrator can then configure customized dashboards and permit to users to view these dashboards.

In the Dashboards option, you can see a list of dashboards that you have the permission to view. You can click a dashboard to view the dashboard in a new tab. You can also select the charts to be included in the dashboard, the pixel size of the charts, and the ordering of the charts.

Apply Ticket Templates on a New Ticket

Affected Customers: Analysts and administrators

You can select and apply a ticket template when creating a ticket from the My Tickets workspace. The Apply Ticket Template option is available in the Actions dropdown on new tickets. A list of the five most frequently requested templates for the selected ticket type are displayed below the Apply Ticket Template section. The logged-in user has permission to view and apply the templates that are displayed.

The ticket templates available are based on the ticket type. For example, a new Service Request that is created using the Create Request action displays ticket templates for Service Requests. Similarly, Incident Tickets that are created using the Create Incident action displays ticket templates for Incidents.

The list within the Actions button displays the top five most used ticket templates; after that a View More option is visible. When you click this option, a list of all permitted ticket templates for the selected ticket type is displayed. You can select a template from the list to apply to the ticket.

The Apply Ticket Template section within the Actions dropdown is only visible until the initial save of the ticket.

Note: In My Service Center, end users cannot view the Apply Ticket Template in the drop-down under the Actions button. The end users can use the Request Catalog workspace and the catalog items that are listed in the My Service Center to log catalog requests.

Export the Details of a Configuration Item to a PDF file

Affected Customers: All users

Configuration Item to a PDF File: You can export the details of a Configuration Item (CI) to a PDF file for off-line viewing or for sharing. The Actions dropdown on the CI record displays a Print action that is grouped under the Service Desk section. You can click Print to see a preview window an overlay.

You can select to include Service Hours and History by checking the Show Service Hours and Show History checkboxes. You can click the Print Screen option to display the print preview on the screen. Alternatively, you can click the Print PDF option to export the CI to a PDF file.

Knowledge Base Article to a PDF File: You can export the details of a Knowledge Base (KB) article to a PDF for offline sharing. The Actions dropdown on the KB Article record displays a Print action that is grouped under the Service Desk section. You can click Print to see a preview window in an overlay. Alternatively, you can click the Print PDF option to export the CI to a PDF file.

Ad-hoc Reports to a PDF and CSV File: You can export the details of an Ad-hoc report to a PDF file. You can also export it to CSV to view it off-line or share it. The buttons Print to PDF and the Export to CSV are for printing a PDF option or exporting the report to a CSV file, respectively.

Ticket List to a PDF and CSV File: You can export the details of a ticket list to a PDF or CSV file to view it off-line or share it. "Print to PDF" and "Export to CSV" buttons can be used to print a PDF option or to export the report to a CSV file, respectively.

The exported CSV or PDF files display any filtering done in the ticket list. The exported list includes the whole ticket list and not only the tickets list on display. Export is per the Grid View, and includes all the columns in the grid.

Dedicated Save Button within Tickets, CI's, and Knowledge Articles

Affected Users: All users

A Save button has been added as a prominently visible button for Tickets, Knowledge Base Articles (KB articles), and Configuration Items (CIs). Since Save is the most frequently used action, you can use this button to their advantage.

Save is also available to you as a drop-down option in the Actions button.

Note: In knowledge articles, the Save button displays only in a new knowledge article or when an existing article is opened in the edit mode.

Specify an Alert Message for Tickets Requested by VIP Users

Affected Customers: All users

A new configurable alert message to display on a ticket for the VIP users is now available. The message is displayed to the analyst or administrator of tickets that are "Requested By" or "Requested For" users who are marked as VIP Users. This function ensures that such tickets are addressed with the appropriate attention.

Administrators or analysts with the required permission can specify the message in the slice parameter VIP_ALERT_MESSAGE in Application Setup, Manage Config Parameters. The slice parameter has a default message, "This is a VIP user, please call the user to communicate all updates." This default message can be modified. The VIP message that is displayed on the ticket reflects the message in the slice parameter.

Identify and Edit Scheduled Reports

Affected Customers: Analysts and administrators

You can identify Standard and Ad-hoc Reports which they have already scheduled. Icons in the report list indicate whether the report is scheduled and if the schedule is active. You can also filter the list of reports to view only scheduled reports. The Show my Scheduled Reports Only checkbox allows you to filter the list to display only those reports that are scheduled.

You can also change and update the report parameters and modify schedule parameters. Schedule Report in Action displays information about the original schedule. You can modify the schedule.

All users can view and edit the schedule of their own reports. Only one schedule can be set for a report at a time by the owner of the report.

Sort Adhoc Reports

Affected Customers: All users

You can set the order for displaying Ad-hoc Reports. In this way, you see the list of reports in the order that best matches your needs and requirements. You can specify a Sort Order on the Ad-hoc Reports while editing or creating the report.

The Ad-hoc Reports list and sorted across all the types of the reports in the following way:

By Type - Defined Searches are listed first and then the Personal Searches.

By Sort Order – Defined Searches.

By Category – Alphabetically (0-9- and A-Z)

By ID of the Report – Reports created earlier show up on the top.

All existing reports have "0" as sort order.

Important! Sort order is now mandatory for saving a report.

Adjusted Sort Order within Actions Button

Affected Users: All users

You can now get to the workflow actions from the Actions button more quickly without needing to scroll through other actions. When a ticket is opened for editing, the Workflow actions are listed first under the Actions button. You can select an appropriate workflow and process the ticket toward the next stage in its resolution.

For new tickets, the Actions drop-down are displayed in the following sequence:

- Apply Ticket Template
- Workflow
- Service Desk
- Workspace

For an existing ticket, the Actions drop-down are displayed in the following sequence:

- Workflow
- Service Desk
- Workspace

Ability to Delete a User from the Platform

Affected Users: Administrators

The tenant administrator can delete a user from the platform to set the status of the user as inactive in the application. When the user is deleted from the platform, the license that is assigned to the user is revoked and the login is disabled. A deleted user is not able to access the application. The user is deleted from the portal, and the status of the user is set as Inactive in CA Nimsoft Service Desk.

Reasons to delete a user:

- The user has left the company.
- The user is no longer using any of the capabilities that the tenant, and indirectly the subtenant, has subscribed to.
- The role or location of a user has changed in a company; the current sub tenant or tenant position of the user requires an update.
- The user is a member of single or multiple tenants and single or multiple security groups. The tenant or groups are updated to reflect more actions correctly by tenant admin on the platform side.

Users that are related to multiple organizations are deleted only when they are deleted from all the organizations that they are related to.

Users that are related to only one organization are deleted when they are deleted from that organization.

Ability to Delete a Subtenant from the Platform

Affected Users: Analysts and administrators

The tenant administrator can delete a subtenant from the platform instance.

The subtenant can be of the following types:

- An organization with no sub-organizations under it
- An organization with sites and locations that are related in a hierarchical way; the organization has sites, and sites have locations under them.

Deprovisioning or deleting organizations is possible in the following ways:

- An organization with no sub-organization can be deleted directly.
- An organization with sites and locations is not deleted directly. First, all the locations are deleted; then, all sites are deleted; and only then, the organization is deleted.

The organization, site, or location that is deprovisioned is set as inactive in CA Nimsoft Service Desk.

The impact on users who are related to an organization that are being deleted result in:

- Users that are related to only one organization are deleted when the organization is deleted.
- Users are related to multiple tenants in the platform or they are related to multiple organizations within the same (single) tenant. These users are de-linked from the organization which is deleted. The user records are not deleted. User can still log in as they are linked to remaining organizations.

In CA NSD, the impact on the user is:

- The deleted users are made inactive, their email addresses are garbled, and the users cannot log in.
- Users that are de-linked from an organization, site, and location remain active; their email address remains the same; and they can log in.

Inclusion of SLA Resolution Due Date in Ticket Lists

Affected Users: Analysts and administrators

You can see the SLA Resolution due date on your ticket list. Displaying the SLA Resolution due date allows you to address tickets with upcoming thresholds or violations sooner than others. The My Tickets list displays 'Resolve by' date when a resolution or closure-related service target applies to the ticket. The Service Level Info portlet on the ticket detail also displays this information.

When the resolution SLA is not applied, the Resolve By information is absent.

Only those service targets with violation thresholds with status of "In Progress", and configured against resolution or closure metrics are considered.

Inclusion of Total Time Spent Field on Ticket Details

Affected Users: All users

Users must know how much time is spent on the different activities on the ticket.

When the worklog is entered, the time that is spent on the ticket is entered in the Time Spent (Min) field by the logged-in user.

The application calculates the Total Time Spent in hours and minutes (HH:MM) for the ticket. This calculation also includes the time that is spent on all child tickets. The total is displayed as 'Total Time' in the Summary portlet of the ticket detail.

The Total Time field in the summary portlet is dynamically updated to the latest calculation of total time spent. The ticket Board also displays the time that was taken for each of the worklog addition.

Ability to Apply Workflow Actions before a Ticket is Saved

Affected Users: All users

You can now select a workflow action before saving the ticket. The drop-down option under the Actions button list workflow actions that do not have matching conditions. These workflow actions can be applied to a new ticket before it is saved.

Analysts can apply a workflow action on a ticket to facilitate a fast resolution rather than putting the ticket through the entire life-cycle.

Some of the advantages that using a workflow action before a ticket is saved provides are as follows:

- Increase the efficiency and speed in process toward a resolution of the ticket
- Enable a first call resolution action so that you do not have to save the ticket before closing it out

Ability for CI to Open in New Workspace

Affected Users: All users

As an enhancement, a Configuration Item (CI) that is listed in the CI list can be double-clicked and opened in a new workspace. This feature quickly opens the CI in a new workspace and aids you to navigate faster and easier.

Categorization in About tab on All Tickets

Affected Users: All users

To create tickets quickly and efficiently, you can enter the categorization of a ticket during the creation of the ticket. Now, you do not need to click a tab and navigate to another workspace and enter the categorization details for the ticket.

You can search and select the CCTI in the About section of a ticket form under Affected Service. Categorization can be selected using the "Search Categorizations" look-up or by entering a text in the categorization field.

Ability to Lock Tickets

Affected Users: Analysts and administrators

When an analyst or an administrator opens a ticket in a new tab or new browser window, the ticket is locked. Another user cannot edit this locked ticket. The ticket list displays a lock icon against the ticket. In the ticket detail, the lock icon is displayed with the Locked By <user name>. When another user attempts to open the ticket, the lock icon indicates that a different user is editing the ticket. A message indicating the ticket is locked displays the Locked By <user name>. A presence icon allows the user to launch a chat session with that user.

The locking of tickets is helpful as it prevents multiple users from editing the same ticket. The lock on tickets prevents overwriting of simultaneous updates in the ticket by users.

Other users can open and view a locked ticket and add worklogs. Other users can also take Service Desk actions such as Create New, Send Mail, Copy to New, or Print.

Ticket locking is not applicable for end users. Analysts cannot perform Bulk Action on the locked tickets. When a user executes bulk action on the locked ticket, an error message is displayed.

The locked tickets get unlocked by the system in the following situations:

- When a user signs out of the application.
- When a user closes the application window.
- When a user reloads the application window.
- By any user who has rights to Manage Ticket Locks under Admin Utilities.
- When the user navigates to a different workspace and the session times out on the My Tickets workspace.

Note: Locking applies on tickets that can be edited. Tickets that are closed or submitted for approval cannot be locked as they are in the read-only mode.

Handle Locked Tickets in Bulk Actions

Affected Users: All users

When one user is editing a ticket, the ticket is displayed as locked to other users in their ticket list. A lock prevents more than one user from editing the ticket at a time. Bulk workflow actions can be applied to a group of selected tickets. Bulk Actions are not possible on Locked Tickets.

Bulk action can be taken on tickets that are listed in the following sections:

- My Tickets
- Related Tickets in the Ticket Detail section
- Related Tickets in the Configuration Items section

A user can select one or more or all tickets from a ticket list irrespective of locked status of the ticket to apply Bulk Action. Bulk Action on a single ticket that is locked is not possible. The application displays an alert message, "Action cannot be performed on the ticket as the ticket is locked by another <user name>".

Users can apply Bulk Action to all ticket listed in a page by selecting the "Select All" option. They can also click the check-boxes of the ticket to select more than one ticket and then apply Bulk Action.

The application executes Bulk Action according to the actual status of a ticket. Bulk action is not executed on the locked tickets. After the bulk action is executed, the Bulk Action Summary displays the status. The tickets to which bulk action was successfully applied are listed first. Another list displays tickets to which the bulk action could not be applied with the reason for the failure.

Access to the Workspaces for End Users

Affected Users: End Users and administrators

The application controls access to specific workspaces and actions even if the application administrator inadvertently permits the end user as members of roles or groups. Access to any restricted workspace is controlled as these work-spaces are not displayed when the end user logs-in.

The restrictions override the permissions that are granted to the end user by the application administrator.

End Users have permissions only to the following workspaces:

- My Service Center
- Request Catalog
- Outstanding Items
- Standard Reports
- Ticket Details
- Knowledge Management: Knowledge Base Article Details are displayed in the read-only mode. An end user can provide feedback and comments.
- My Profile
- My Password

Create Ticket from Chat

Affected Users: All Users

Users can now create tickets directly from their chat sessions based on their permission. By default, "Create Request" action is available for analysts and administrators to create a service request from the contents of a chat session.

The administrator grants permission and controls the chat actions. The administrator can configure the following chat actions from chat:

- Create Incident
- Create Problem
- Create Change

  Note: Task Tickets cannot be created from a chat session.

Without the permission from the administrator, an analyst or administrator is unable to create Incident, Problem, and Change. End Users can create a Request from a chat session only if the administrator grants permission. The end user cannot create the other ticket types.

The ticket that is created from chat opens in a new tab when it is created from a CA NSD workspace. The new ticket opens in a new window when it is created from My Board or a workspace outside CA NSD. The ticket incorporates information from the chat session into the ticket in the following way:

- The person who initiates the creation of ticket is the Requester.
- The other person in the chat session is the Requested For user. For more than two people in the chat session, the first person is the Requested For user.

  Note: If the end user creates a request, the Requested For field the name of the Requester.
- Primary Organization, Primary Phone Number, and Primary Email Address are automatically populated.
- The VIP flag is set if the Requester or the Requested For is a VIP.
- The Description is left blank to allow the user creating the ticket to fill it in.
- The Details field is populated with the content of the chat session. The ticket creator can edit the details before saving the ticket. All contents of the chat session are Public and included in the details. However, the participants can categorize a message as Private. Private Messages are excluded from the Detail section of the ticket.
- The ticket Source field value is set to "Chat" for all ticket types; it can be changed, if necessary.
- The chat transcript, which contains the full chat session, is added as an attachment to the ticket.

Tickets can be created simultaneously from multiple chat windows with different participants. When a user tries to create multiple tickets of a specific type during a chat session, a confirmation message is displayed. The confirmation message reads, "Ticket has already been created from this conversation. Would you like to create another ticket?" The user can confirm to create another ticket or cancel the action.

Log Tickets Quickly Using the Scratchpad

Affected Users: Analysts and administrators

The new Scratchpad enables analysts to take notes from requesters calling in for IT support or services, and quickly log a ticket using the notes. The goal of the Scratchpad is to simplify logging a ticket and allow the analyst to focus on resolving the issue. By capturing all significant information quickly in a single workspace, the Scratchpad minimizes navigation to different sections to log a request.

The scratchpad captures information that is required to log a request in the following way:

- Contact Name: the name of the Requester and Requested For the ticket.

  Name Search: this icon helps to locate a name from existing contacts.

  View Profile: this icon allows an analyst to view the details of the contact.

On selecting and entering a name in the Contact Name field, two accompanying portlets get populated.

  User Badge: displays the contact image and details such as Primary Organization, email, telephone, and VIP status.

  User Notes: displays information that is recorded for the contact as Notes in Contact Profile.

- Related Tickets: includes open tickets and tickets that were modified in the last 90 days in which the user is the “Requester" or the "Requested For”.
- Related CIs: includes CIs for which user is the owner or a related contact.
- Details: a field for the analyst to capture information from the requester. On Submit, the first 256 characters of the text in Details are copied into the ticket details field. The ticket description includes all the text of the Scratchpad details field.
- Source: set as Scratchpad.

When a user clicks submit, the ticket is created. Users can click "Open the ticket in a new tab" to open the ticket in a new tab for further editing.

Update Information using Bulk Process

Affected Users: Administrators

Bulk Processing now allows customers to make updates that are related to Contacts and Security Groups that is Organizations, Sites, and Locations. Users can add new users and security groups. They can also update properties for existing entities. Users provide new values only for data fields to be updated. Users do not reenter values in worksheet that remain unchanged. This approach to update information is useful for making limited, minimum changes to the existing information.

Updates in contact information can be done using Bulk Processing. Users can download the sample worksheet from the application and can insert the updated information. The application uses the email ID of the contact to search for contact records to be updated in the contact information. If the email ID of a contact is found, the existing record is updated with any changes included in the template. If no matching email ID is found, a fresh record is created.

The First Name, Last Name, Email, and Organization are mandatory fields. Information in Support Group, Primary Group, Organization, and Relation in the bulk upload template are added instead of being updated.

For updating information about Organizations, NSD bulk processes Organization records in the application that are based on the worksheet. Similarly, worksheets are used to bulk process records related to Sites for each organization, and Location for each site. The information in the Organization and Parent Organization columns are mandatory. Together these form the look-up that the application uses to update the existing information.

Bulk Process Data for Entities

Affected Users: Administrators

Bulk Process Data is now available through Manage, Application Setup. Users can bulk update entities other than contacts and security groups (organization, sites, and locations) efficiently. The import links for contacts and security groups are disabled in the Execute Operations tab. These imports are executed through Manage, Users on the Platform side.

For configuring the data, the administrator is provided with an ability to download three system defined bulk import templates. The administrator can select any of the following templates depending on the task:

- XLS Template for importing users and organizations
- XLS Template for bulk upload operations of all NSD entities other than Contacts and Organizations.

- XML Template for bulk upload operations of all NSD entities other than Contacts and Organizations.

Note: Do not download and use the Sample Excel File on the Import page in Users under Manage.

Modified Display of Number of Days in Reports

Some reports have day as one of the criteria to generate a report. The calendar to select the day now shows values that are based on the month and the year. For example, for February, the number of days is either 28 or 29 depending on whether the year is a leap year or not.

The change in the value is available in all browsers and in all the supported languages.

Chapter 4: Considerations

This chapter describes the characteristics and conditions of this release that could affect the general behavior of CA Nimsoft Service Desk.

This section contains the following topics:

Special Characters Restriction for Application (see page 31)
ASCII Characters not supported (see page 31)
Apache Tomcat Limit on Size of HTTP POST Requests (see page 31)

Special Characters Restriction for Application

Do not use special characters '|' and '~' when entering data in the application. They are restricted characters for application data. The application does not work correctly when these characters are used.

ASCII Characters not supported

The application does not support ASCII characters like Single Quote which get carried over when text is copied from a Microsoft Office Word file.

Do not copy and paste data from Microsoft Office Word files or other documents directly into any input field in the application.

Apache Tomcat Limit on Size of HTTP POST Requests

CA Nimsoft Service Desk uses the Apache Tomcat is the web application server. By default it sets a limit on the maximum size of HTTP POST requests that it accepts. In Tomcat 5, this limit is set to 2 MB. To alter this limit, refer to the “maxPostSize” in Tomcat Configuration Reference.

Chapter 5: Known Defects

The list identifies the known defects in CA Nimsoft Service Desk 7.0.5.

- **DE19624**: Instead of the dd/MM/yyyy format, dates are displayed in the US date format of MM/dd/yyyy.
- **DE21402**: The Chat window between two participants opens randomly when one participant terminates the chat session.
- **DE22024**: Ticket time is displayed incorrectly after daylight saving time changes.
- **DE22408**: Communication Template -2 and -16 are displayed as Related to Service Requests though they are for all the ticket types.
- **DE23413**: System is allowing user to add new 'Status' values and modify the Status from Manage Value Lists.
- **DE23438**: Unable to update the Custom Attributes of CIs through the Web Service Calls.
- **DE23491**: Unable to update the CCTI_class of a Configuration Item using the Web Service call.
- **DE23595**: Unable to delete or close a ticket without a Requester Name.