

ServiceWise/CustomerWise 10.1

Highlights

- Widescreen and multi monitor support
- Unified incident level attachments
- New HTML5 ProjectPlan with resource management
- Doubled number of available customer tracking fields
- Performance and UI improvements (Conversation, links, action buttons and more...)
- New ServiceWise mobile app

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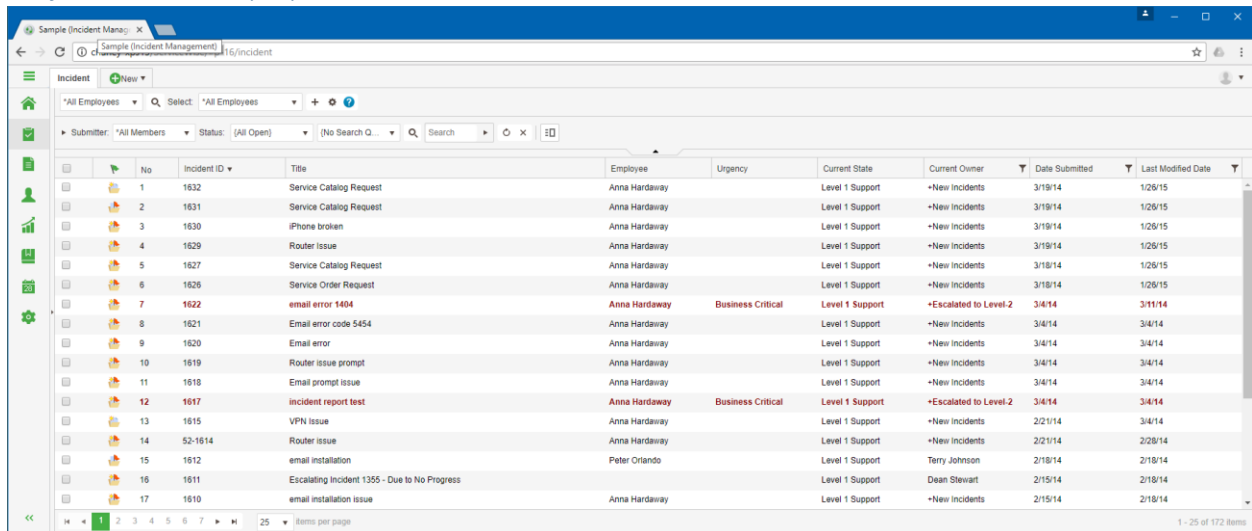
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ServiceWise/CustomerWise Web

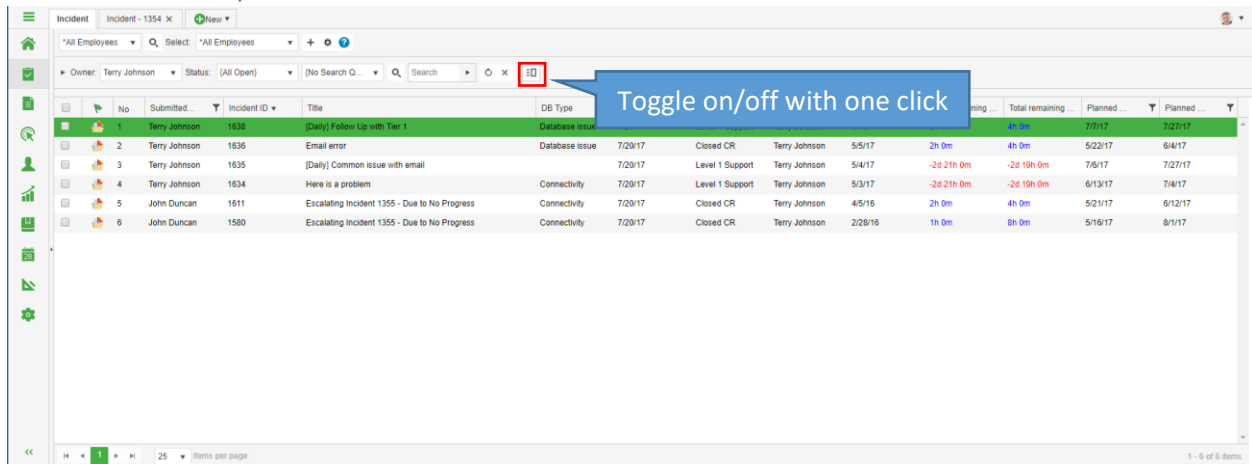
UI Change

Project name is displayed in browser tab title

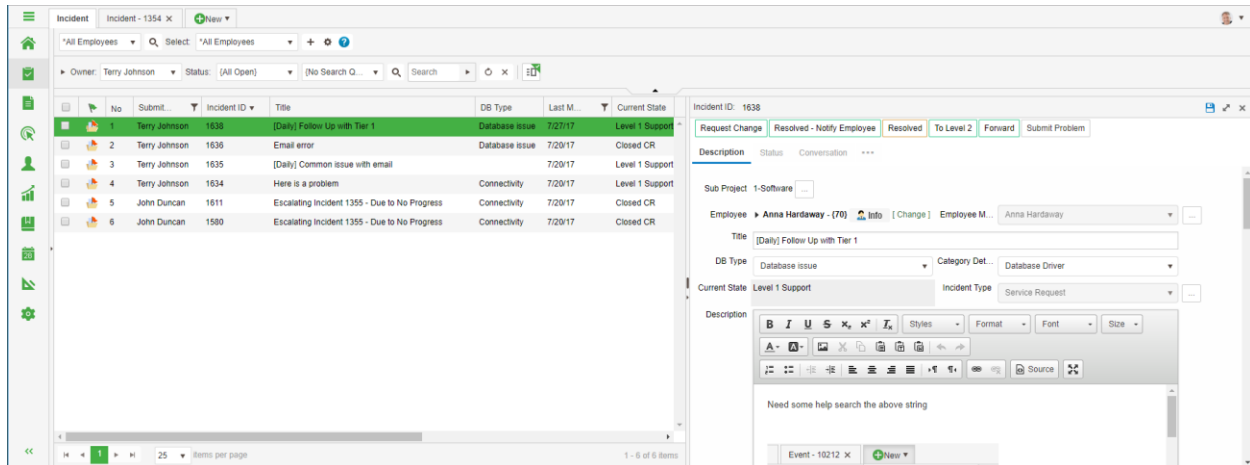


No	Incident ID	Title	Employee	Urgency	Current State	Current Owner	Date Submitted	Last Modified Date
1	1632	Service Catalog Request	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14	1/26/15
2	1631	Service Catalog Request	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14	1/26/15
3	1630	iPhone broken	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14	1/26/15
4	1629	Router issue	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14	1/26/15
5	1627	Service Catalog Request	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14	1/26/15
6	1626	Service Order Request	Anna Hardaway		Level 1 Support	+New Incidents	3/18/14	1/26/15
7	1622	email error 1404	Anna Hardaway	Business Critical	Level 1 Support	+Escalated to Level-2	3/4/14	3/11/14
8	1621	Email error code 5454	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14	3/4/14
9	1620	Email error	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14	3/4/14
10	1619	Router issue prompt	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14	3/4/14
11	1618	Email prompt issue	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14	3/4/14
12	1617	incident report test	Anna Hardaway	Business Critical	Level 1 Support	+Escalated to Level-2	3/4/14	3/4/14
13	1615	VPN issue	Anna Hardaway		Level 1 Support	+New Incidents	2/21/14	3/4/14
14	52-1614	Router issue	Anna Hardaway		Level 1 Support	+New Incidents	2/21/14	2/28/14
15	1612	email installation	Peter Orlando		Level 1 Support	Terry Johnson	2/18/14	2/18/14
16	1611	Escalating Incident 1355 - Due to No Progress			Level 1 Support	Dean Stewart	2/15/14	2/18/14
17	1610	email installation issue	Anna Hardaway		Level 1 Support	+New Incidents	2/15/14	2/18/14

Quick on/off Side panel with full detail

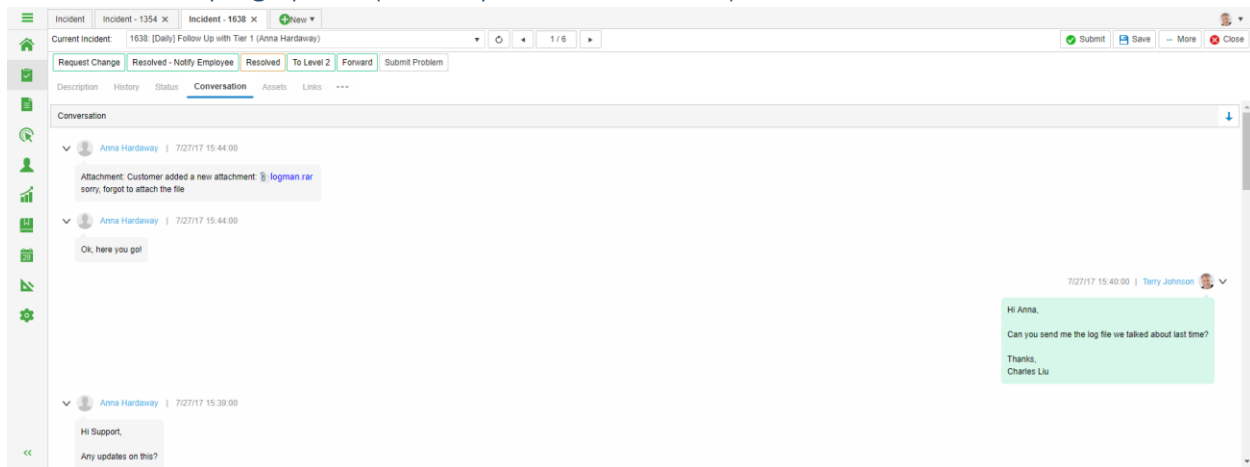


No	Submitted...	Incident ID	Title	DB Type	Urgency	Current State	Current Owner	Date Submitted	Last Modified Date
1	Terry Johnson	1636	[Daily] Follow Up with Tier 1	Database issue		Closed CR	Terry Johnson	5/5/17	5/22/17
2	Terry Johnson	1636	Email error	Database issue	7/20/17	Closed CR	Terry Johnson	5/4/17	7/6/17
3	Terry Johnson	1635	[Daily] Common issue with email		7/20/17	Level 1 Support	Terry Johnson	5/3/17	7/6/17
4	Terry Johnson	1634	Here is a problem	Connectivity	7/20/17	Level 1 Support	Terry Johnson	4/5/16	6/13/17
5	John Duncan	1611	Escalating Incident 1355 - Due to No Progress	Connectivity	7/20/17	Closed CR	Terry Johnson	2/28/16	5/12/17
6	John Duncan	1580	Escalating Incident 1355 - Due to No Progress	Connectivity	7/20/17	Closed CR	Terry Johnson	2/28/16	8/1/17



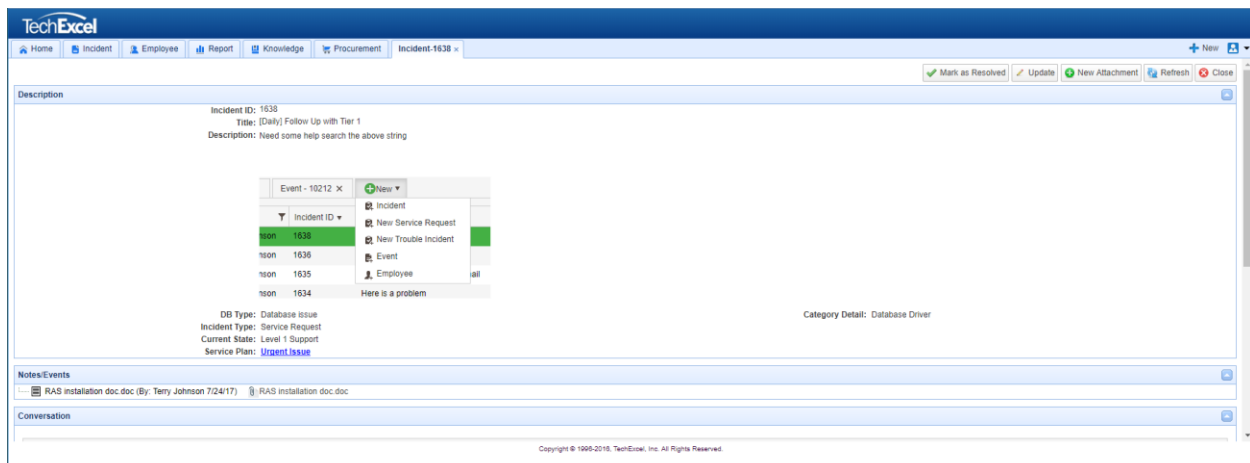
The screenshot displays the TechExcel incident management system. On the left, a sidebar contains navigation icons. The main area shows a table of incidents with columns for No., Submit..., Incident ID, Title, DB Type, Last M., and Current State. The table lists six incidents, with the first one highlighted. On the right, a detailed view for Incident ID 1638 is shown, including fields for Request Change, Resolved - Notify Employee, Resolved, To Level 2, Forward, and Submit Problem. Below these are fields for Sub Project, Employee, Title, DB Type, Category Det., Current State, Incident Type, and Description. The description field contains the text "Need some help search the above string".

Conversation styling update (formerly web conversation)



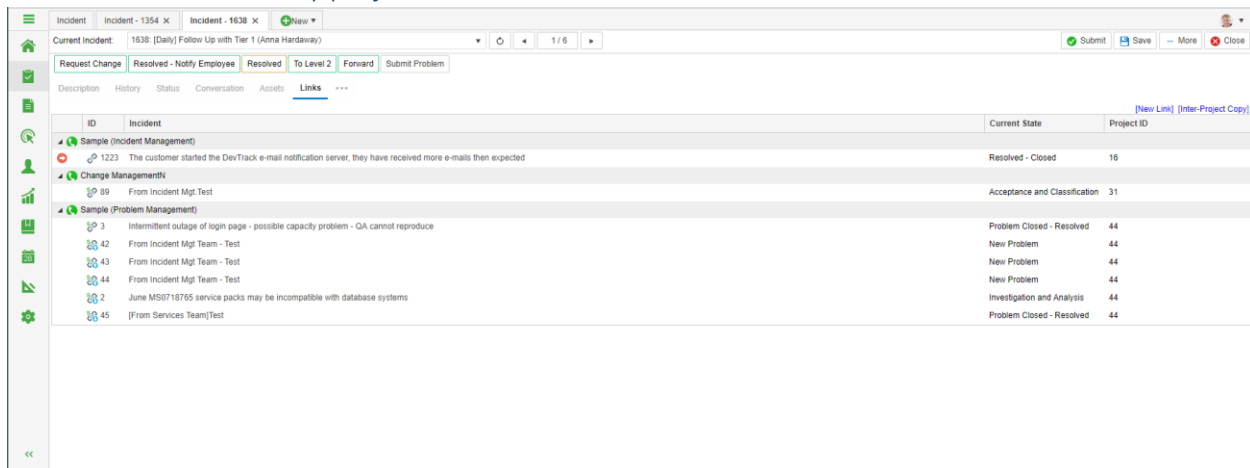
The screenshot shows the conversation thread for Incident ID 1638. The interface includes tabs for Description, History, Status, Conversation, Assets, and Links. The Conversation tab is active, displaying a list of messages. The first message is from Anna Hardaway at 7/27/17 15:44:00, stating "Attachment: Customer added a new attachment: logman.rar sorry, forgot to attach the file". The second message is from Anna Hardaway at 7/27/17 15:44:00, stating "Ok, here you go!". The third message is from Anna Hardaway at 7/27/17 15:39:00, stating "Hi Support, Any updates on this?". On the right, a preview of the conversation thread is visible, showing the same messages.

Mark as resolved function in EWP now available as a dedicated action button



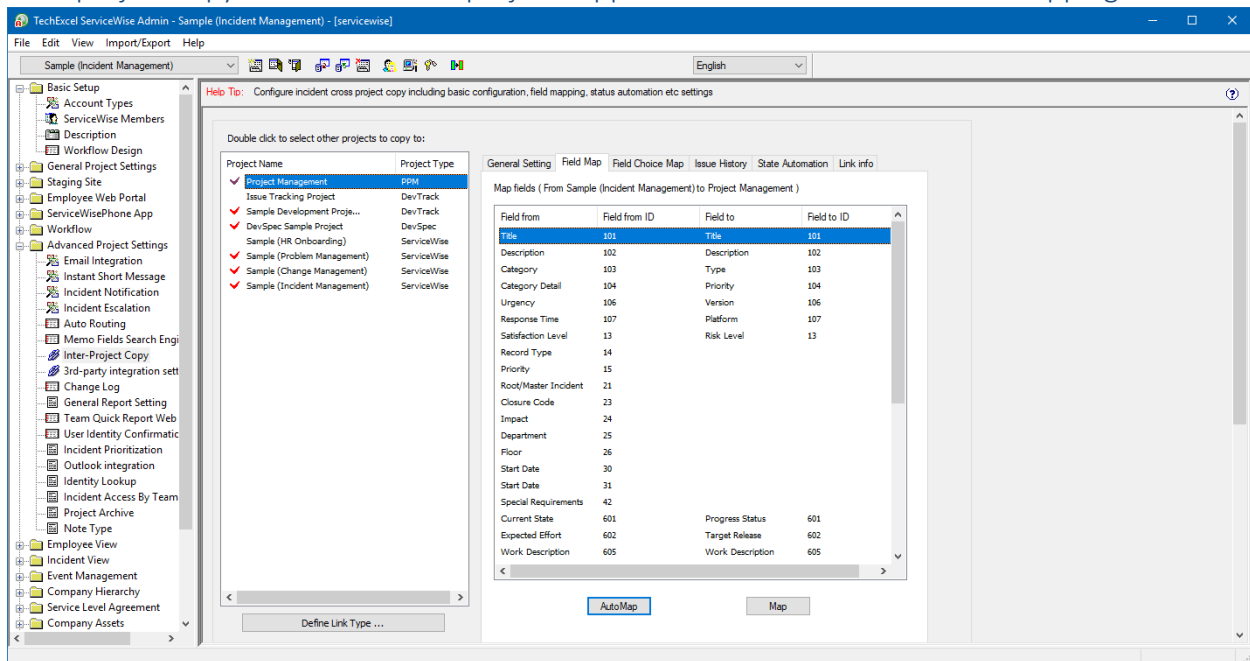
The screenshot shows the TechExcel incident management system with the 'Mark as Resolved' action button highlighted. The interface includes a top navigation bar with links for Home, Incident, Employee, Report, Knowledge, Procurement, and Incident-1638. Below the navigation bar, there are buttons for Mark as Resolved, Update, New Attachment, Refresh, and Close. The main area displays the incident details for Incident ID 1638, including the Title, Description, DB Type, Incident Type, Current State, and Service Plan. A dropdown menu is open, showing options for Incident ID, Incident, New Service Request, New Trouble Incident, Event, Employee, and all. The bottom section of the interface contains tabs for Notes/Events and Conversation.

linked incidents listed by projects



ID	Incident	Current State	Project ID
1223	The customer started the DevTrack e-mail notification server, they have received more e-mails than expected	Resolved - Closed	16
89	From Incident Mgt Test	Acceptance and Classification	31
3	Intermittent outage of login page - possible capacity problem - QA cannot reproduce	Problem Closed - Resolved	44
42	From Incident Mgt Team - Test	New Problem	44
43	From Incident Mgt Team - Test	New Problem	44
44	From Incident Mgt Team - Test	New Problem	44
2	June MS0718765 service packs may be incompatible with database systems	Investigation and Analysis	44
45	[From Services Team]Test	Problem Closed - Resolved	44

Inter project copy to DevSuite PPM project support user defined custom field mapping



Field from	Field from ID	Field to	Field to ID
Title	101	Title	101
Description	102	Description	102
Category	103	Type	103
Category Detail	104	Priority	104
Urgency	106	Version	106
Response Time	107	Platform	107
Satisfaction Level	13	Risk Level	13
Record Type	14		
Priority	15		
Root/Master Incident	21		
Closure Code	23		
Impact	24		
Department	25		
Floor	26		
Start Date	30		
Start Date	31		
Special Requirements	42		
Current State	601	Progress Status	601
Expected Effort	602	Target Release	602
Work Description	605	Work Description	605

Show view name under navigation panel

Setting to display view name

Refresh browser tab to see view name

Change Sort by option for sub-project directly on the menu

No	Incident ID	Title	Employee	Urgency	Current State	Current Owner	Date Submitted	Last Modified
1	1612	Service Catalog Request	Anna Hardaway	Level 1 Support	+New Incidents	3/19/14	1/26/15	
2	1613	Service Catalog Request	Anna Hardaway	Level 1 Support	+New Incidents	3/19/14	1/26/15	
3	1614	iPhone broken	Anna Hardaway	Level 1 Support	+New Incidents	3/19/14	1/26/15	
4	1615	Router issue	Anna Hardaway	Level 1 Support	+New Incidents	3/19/14	1/26/15	
5	1616	Service Catalog Request	Anna Hardaway	Level 1 Support	+New Incidents	3/18/14	1/26/15	
6	1617	Service Order Request	Anna Hardaway	Level 1 Support	+New Incidents	3/18/14	1/26/15	
7	1618	email error 1404	Anna Hardaway	Business Critical	+Escalated to Level-2	3/4/14	3/11/14	
8	1619	Email error code 5454	Anna Hardaway	Level 1 Support	+New Incidents	3/4/14	3/4/14	
9	1620	Email error	Anna Hardaway	Level 1 Support	+New Incidents	3/4/14	3/4/14	
10	1621	Router issue prompt	Anna Hardaway	Level 1 Support	+New Incidents	3/4/14	3/4/14	
11	1622	Email prompt issue	Anna Hardaway	Level 1 Support	+New Incidents	3/4/14	3/4/14	
12	1623	incident report test	Anna Hardaway	Business Critical	+Escalated to Level-2	3/4/14	3/4/14	
13	1624	VPN issue	Anna Hardaway	Level 1 Support	+New Incidents	2/21/14	3/4/14	
14	1625	Router issue	Anna Hardaway	Level 1 Support	+New Incidents	2/21/14	2/28/14	
15	1626	email installation	Peter Orlando	Level 1 Support	Terry Johnson	2/18/14	2/18/14	
16	1627	Escalating incident 1355 - Due to No Progress	Level 1 Support	Dean Stewart	2/15/14	2/18/14		

Add 'Submit' button when editing event detail

Submit updates and close the dialog

Multiline edit box with a round corner and drag to expand

For a smooth look and feel, multiline edit box is displayed with a corner radius and drag to expand

UI color schema update

#FFFFFF background-color for controls

No	Incident ID	Title	Employee	Level	Status	Created	Resolved
1	1632	Service Catalog Request	Anna Hardaway	Level 1 Support	New Incidents	3/19/14	1/26/15
2	1631	Service Catalog Request	Anna Hardaway	Level 1 Support	New Incidents	3/19/14	1/26/15
3	1630	iPhone broken	Anna Hardaway	Level 1 Support	New Incidents	3/19/14	1/26/15
4	1629	Router issue	Anna Hardaway	Level 1 Support	New Incidents	3/19/14	1/26/15
5	1627	Service Catalog Request	Anna Hardaway	Level 1 Support	New Incidents	3/19/14	1/26/15
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11	1618	Email prompt issue	Anna Hardaway	Level 1 Support	New Incidents	3/4/14	3/4/14
12	1617	incident report test	Anna Hardaway	Business Critical	Escalated to Level-2	3/4/14	3/4/14
13	1615	VPN issue	Anna Hardaway	Level 1 Support	New Incidents	2/21/14	3/4/14
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16	1611	Escalating Incident 1355 - Due to No Progress	Anna Hardaway	Level 1 Support	Dean Stewart	2/15/14	2/18/14
17	1610	email installation issue	Anna Hardaway	Level 1 Support	New Incidents	2/15/14	2/18/14

#FEFEFE background-color for Detail Panel background

Current Incident: 1632: Service Catalog Request (Anna Hardaway)

Request Change | Resolved - Notify Employee | Resolved | To Level 2 | Forward | Submit Problem

Sub Project: [Select]

Employee: Anna Hardaway - (70) [Info] [Change]

Title: Service Catalog Request

Category: Computer hardware setup | Category Detail: Installation

Description: [Text Area]

Priority: [Select] | Incident Type: Service Request

Urgency: [Select] | Impact: [Select]

Dashboard View

Multiple dashboard

Ability to setup multiple dashboard tab for different purpose with access control

Welcome Terry Johnson

My Workspace | Manager

Work Summary for Terry Johnson

Current Project: Sample (Incident Management)

Project Name: ServiceWrite

ServiceWrite

- Change ManagementN
- Sample (HR Onboarding)
- Sample (Problem Management)
- CustomerWrite
- Sample (Customer Support)
- Sample (Marketing Campaign Management)
- Sample (Sales Force Automation)
- AssetWrite
- ABC Software CustomerBase
- ABC Company, Inc
- DevSuite
- Portfolio Project Template
- Project Management
- DevTrack Project Template
- Issue Tracking Project
- Sample Development Project - DevTrack
- DevSpec Sample Project
- DevSpec Project Template

Setup Tabs

Manager

Daily Review

Users

Account Types	Access
Director of support	Can edit
Team Groups	
West Coast Group	Can view
Users	
William Neil	Can edit

My Incidents by Urgency/Category

(Unspecified) 4 67%

Medium 2 33%

Calendar

August 2017

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Support Team 52 29%

Escalated to Level-2 2 1%

New Incidents 68 39%

(Unspecified) 2 1%

John Duncan 13 7%

William Neil 10 6%

Terry Johnson 4 3%

Able to target view when switch to another project from dashboard

The screenshot shows the ServiceWise dashboard for user Terry Johnson. The main table lists various projects with columns for Project Name, Project Type, Open Incidents, and Open Events. A context menu is visible over the 'Sample JHR Onboarding Ticket' project, showing options like 'Switch To', 'Home', and 'Employee'. The right-hand panel displays 'My Incidents by Urgency/Category' with a bar chart, a calendar for August 2017, and 'My Team Members' with incident ownership statistics.

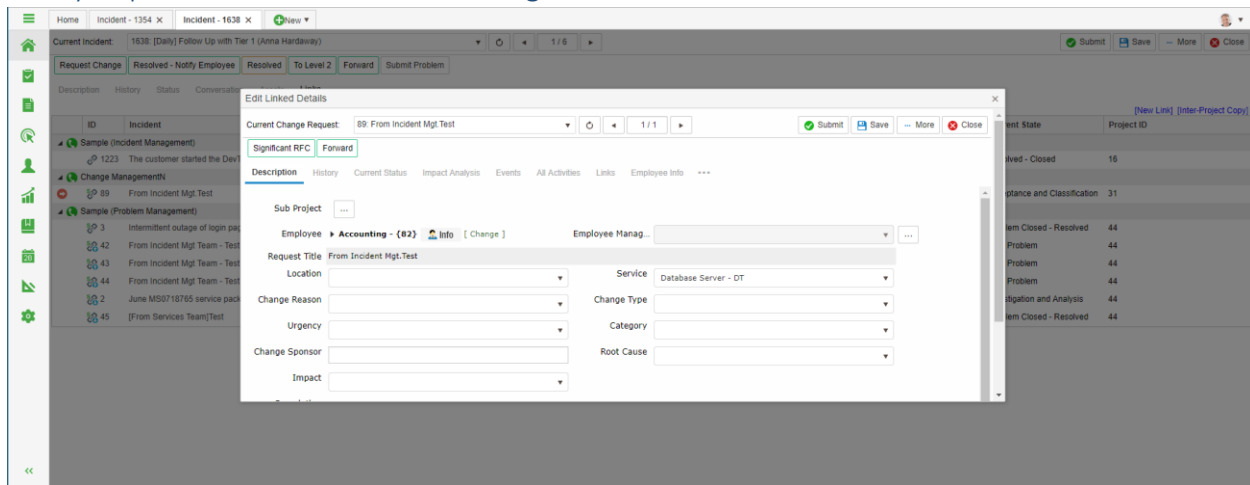
Project Name	Project Type	Open Incidents	Open Events
ServiceWise			
Change ManagementN	Help desk project	7	0
Sample JHR Onboarding Ticket	Help desk project	0	0
Sample (Problem Ma	Help desk project	8	0
Event	Help desk project	0	0
CustomerWise			
Sample (Customer Support)	Support project	11	21
Sample (Marketing Campaign Management)	Marketing project	4	0
Sample (Sales Force Automation)	Sales project	15	10
AssetWise			
ABC Software CustomerBase	CMDB project	0	0
ABC Company, Inc	CMDB project	0	0
DevSuite			
Portfolio Project Template	PPM project	0	0
Project Management	PPM project	103	0
DevTrack Project Template	DevTrack Project	0	0
Issue Tracking Project	DevTrack Project	8	0
Sample Development Project - DevTrack	DevTrack Project	17	0
DevSpec Sample Project	DevSpec project	0	0

Incident View

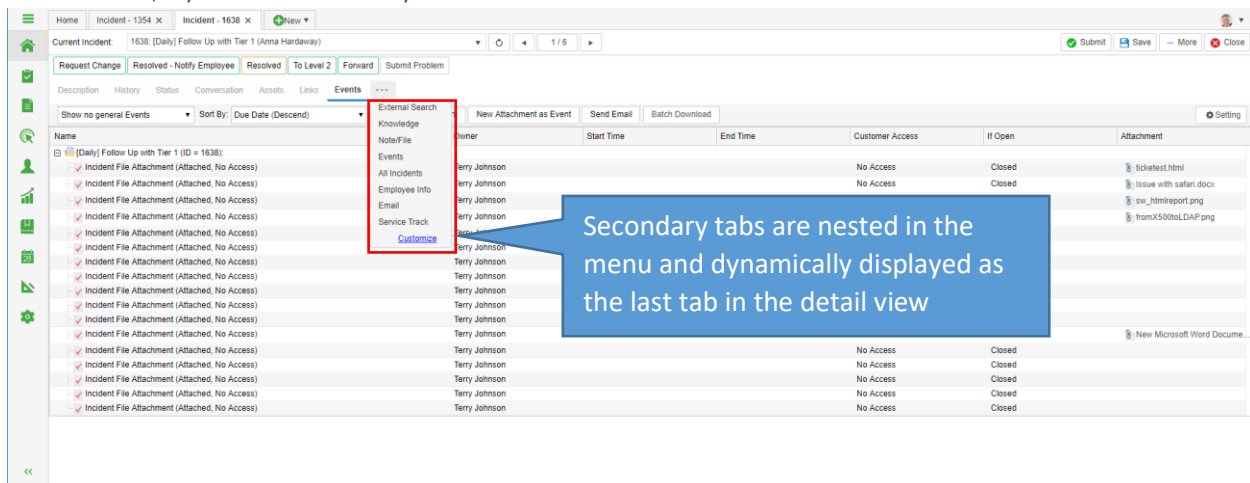
Updated print description

The screenshot shows the incident view for incident #1638. On the left, a print dialog is open, showing options to save as PDF, print all pages, and choose a layout. The main content area displays the incident details for '#1638 [Daily] Follow Up with Tier 1'. The details include the sub-project 'Hardware', employee 'Anna Hardaway', title '[Daily] Follow Up with Tier 1', DB type 'Database issue', current state 'Resolved - Closed', and description 'clock # 677587'. A note at the bottom of the description area says 'Need some help search the above string. Close Description. [Closed by Terry Johnson - 7/13/17 15:00:00]'.

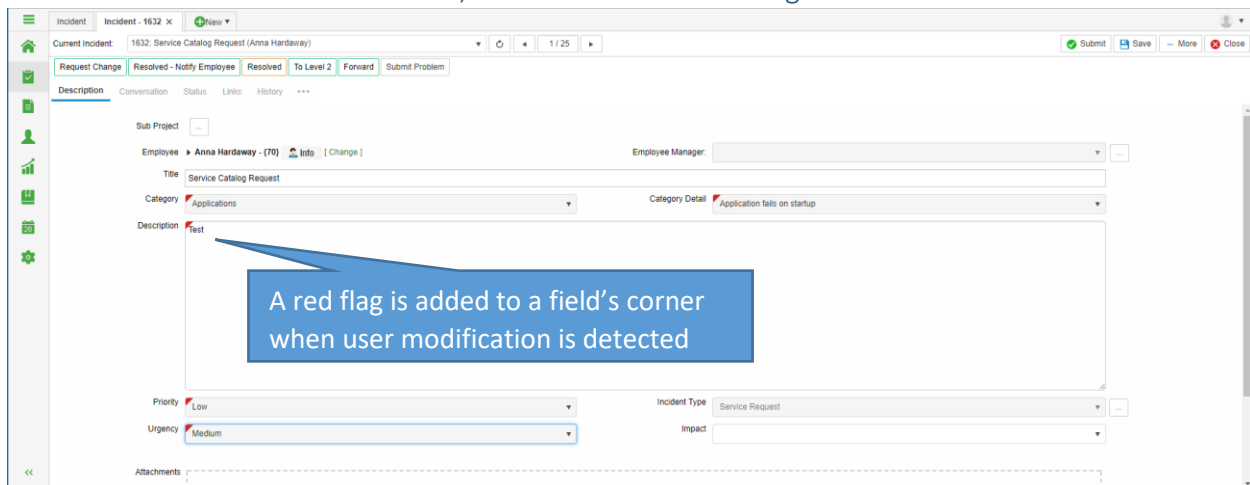
Ability to perform transition when editing linked incident

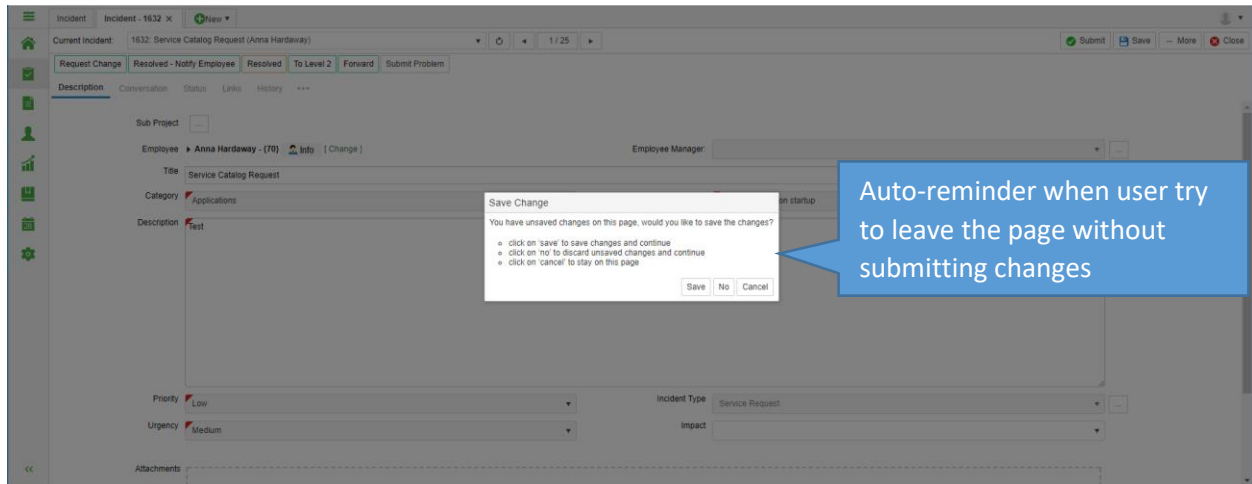


Detail View, dynamic secondary tab

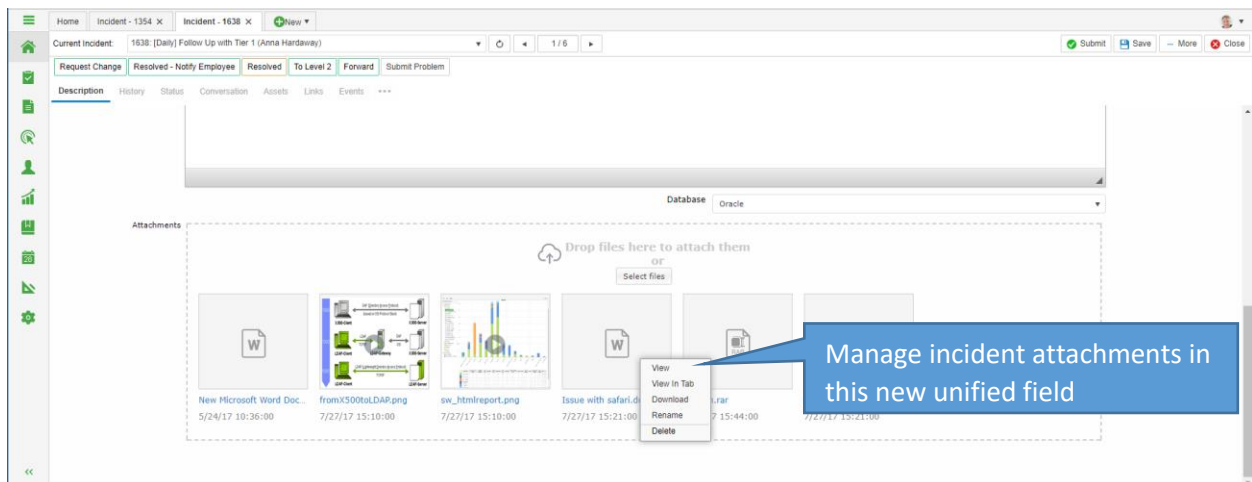
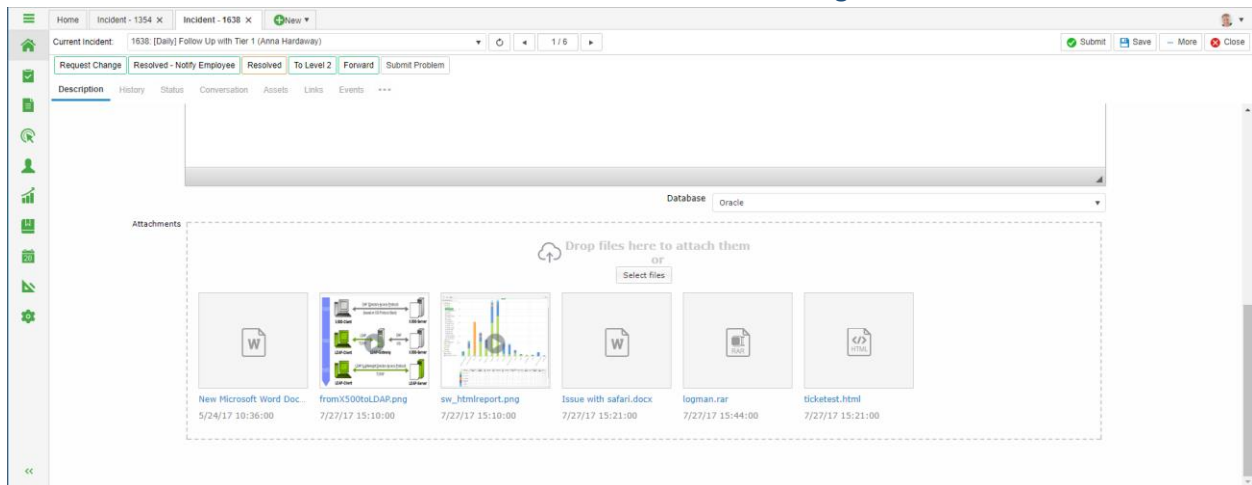


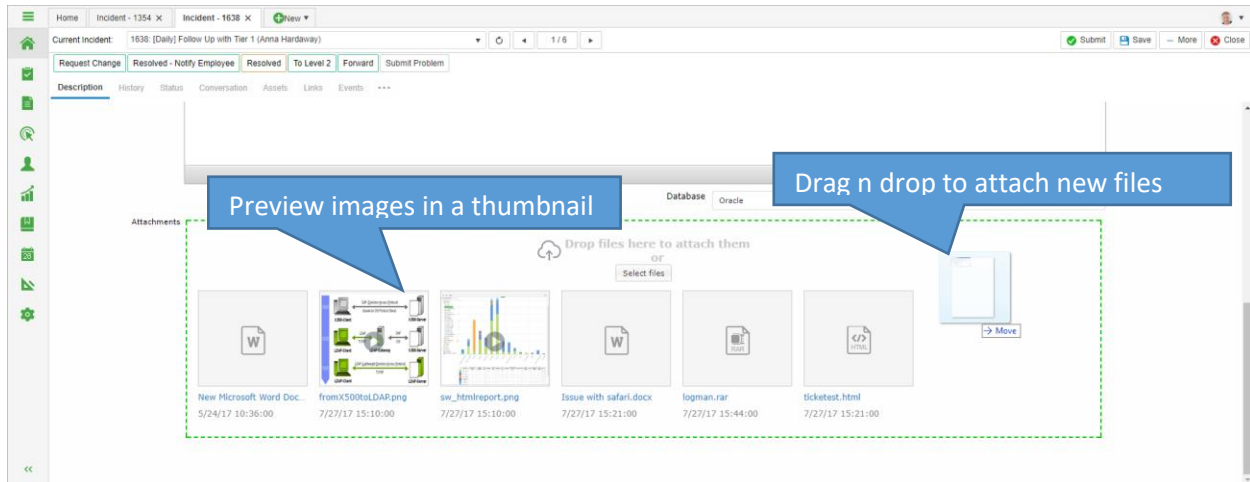
Smart indication for modified fields, reminders for save changes



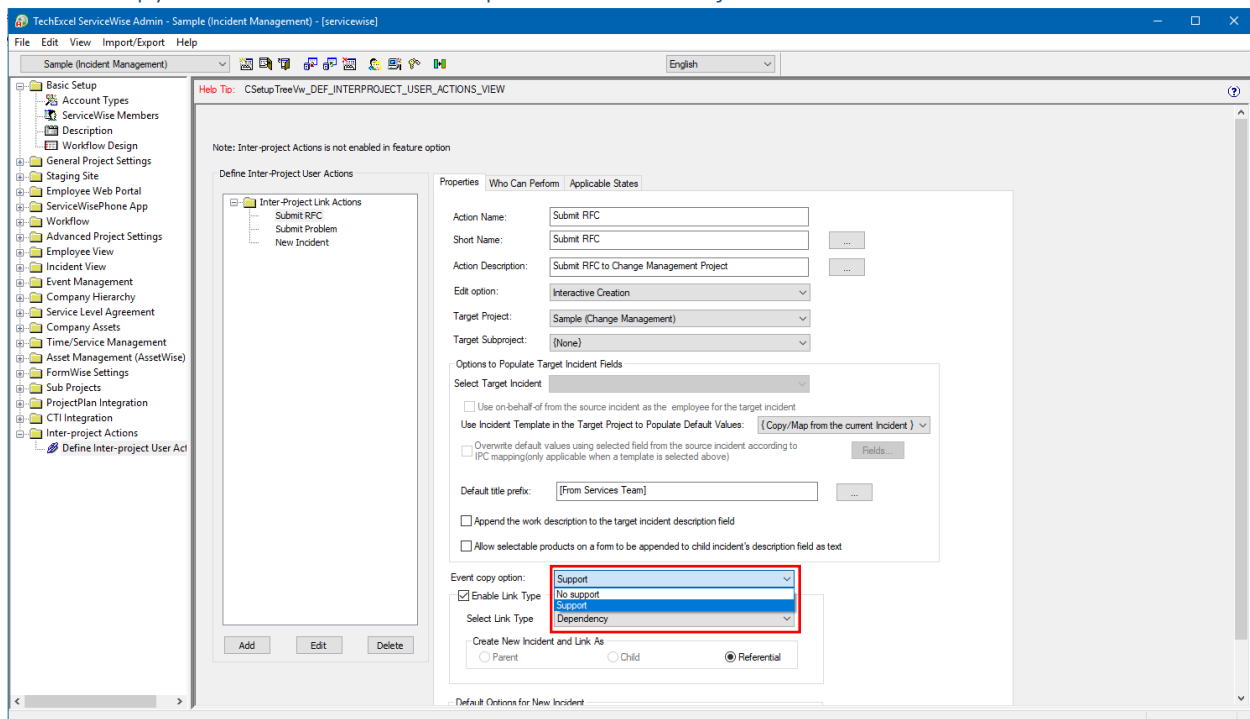


New attachment control and unified incident attachments management

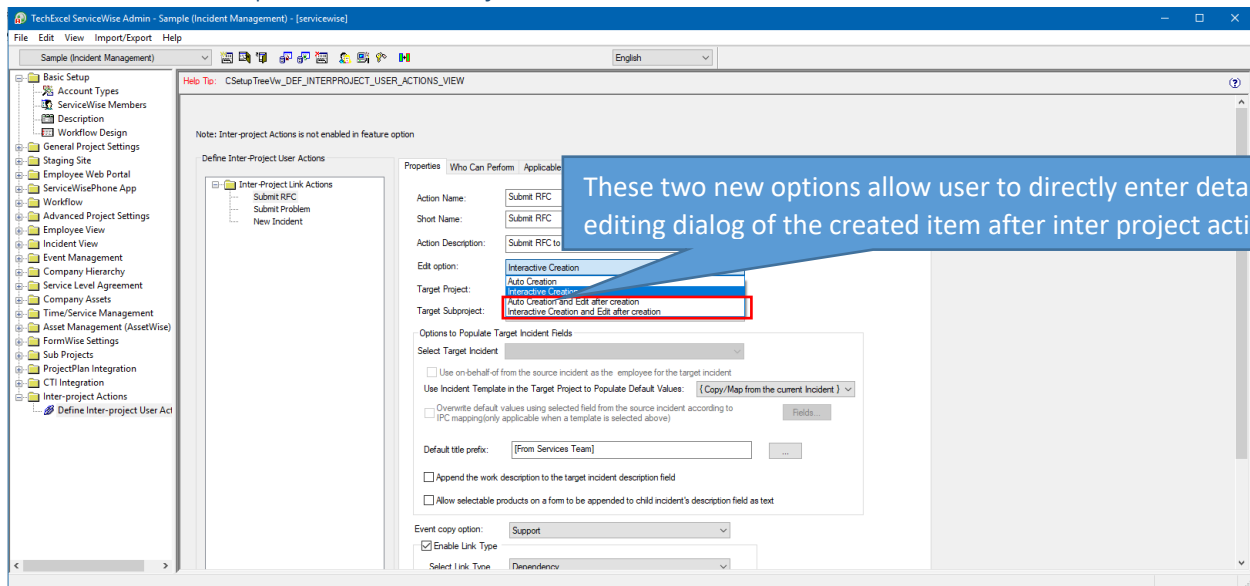




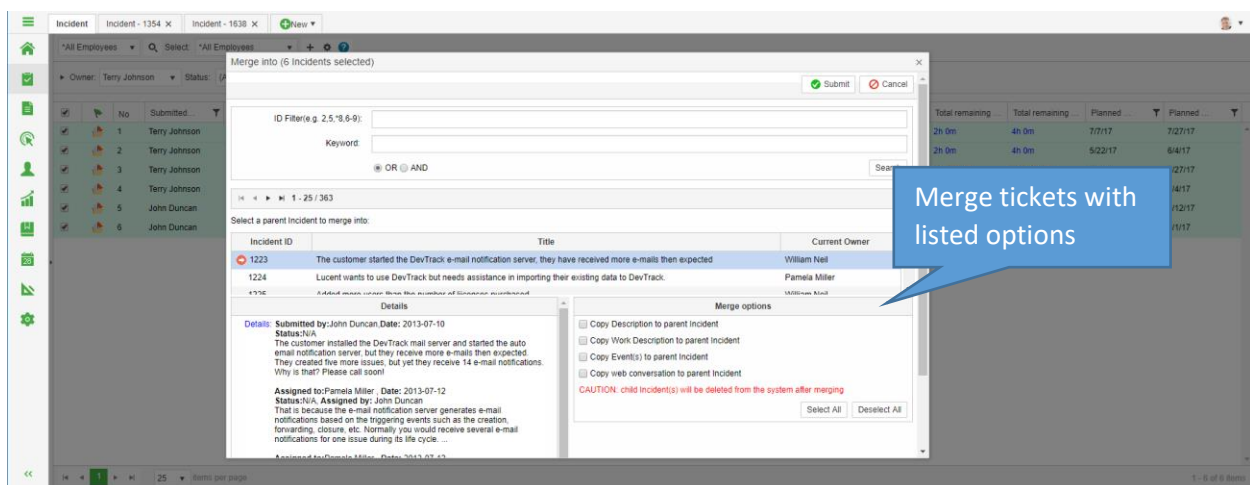
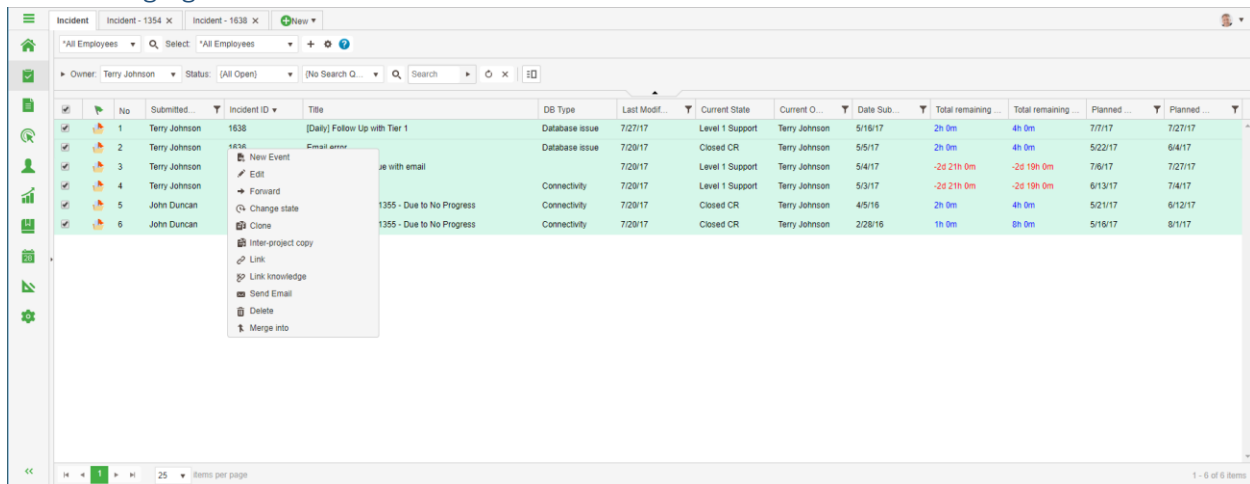
Define 'copy events' as an available option for Inter Project Action



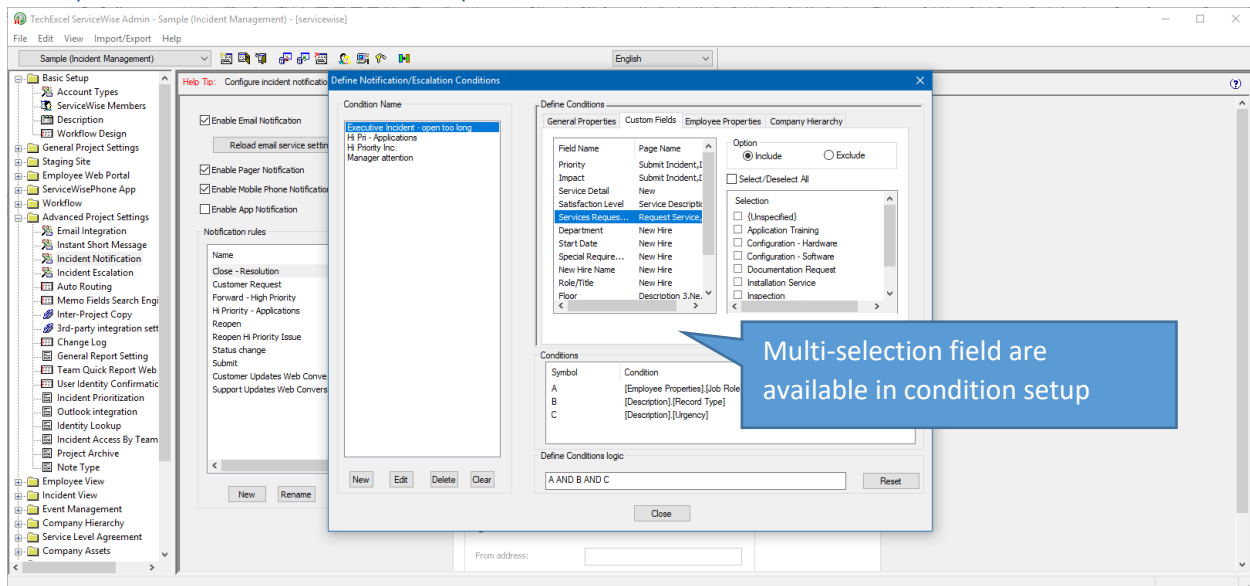
Define direct edit option for Inter Project Action



Ticket merging

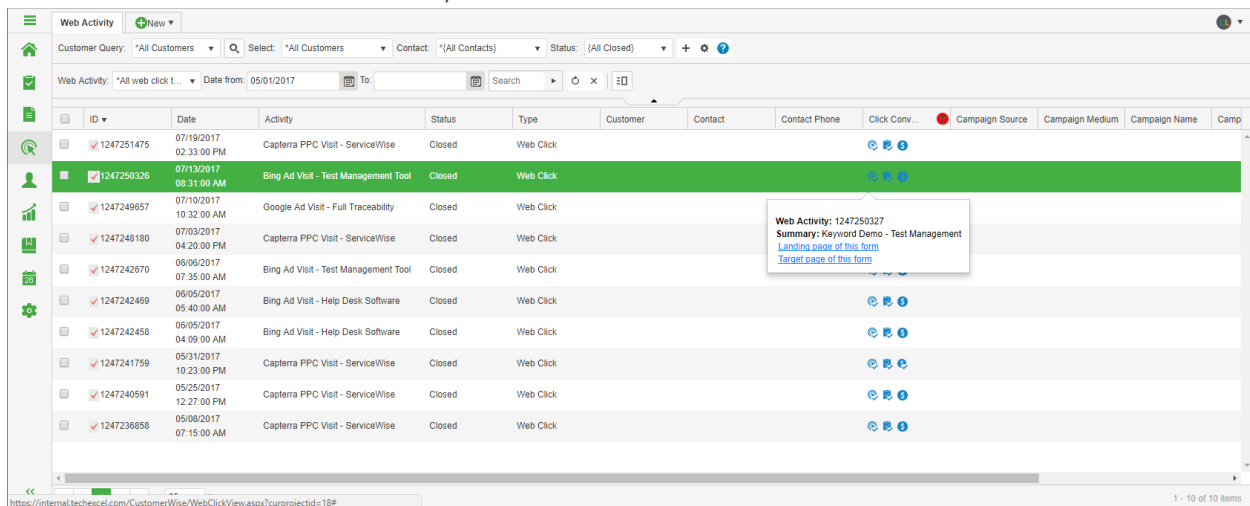


Multiple selection in condition setup

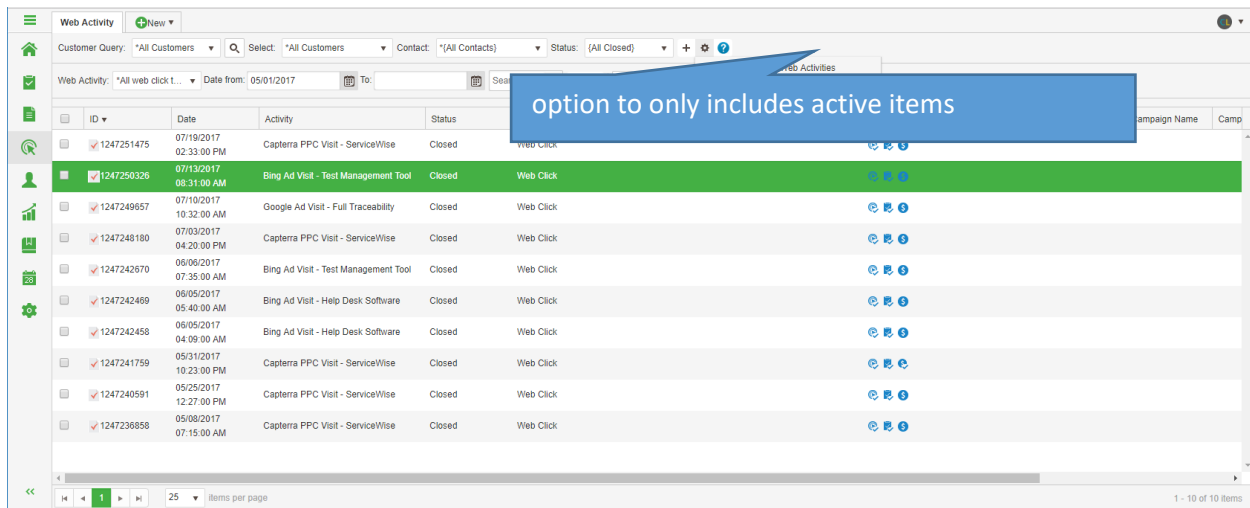


Web Click View

View linked form from web activity list

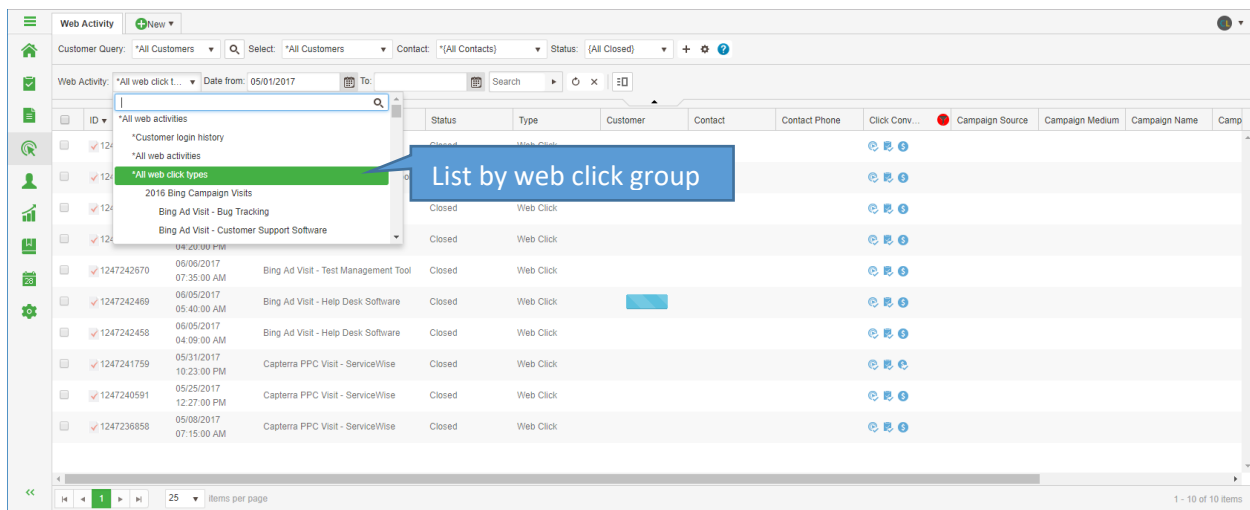


Web Activity list view filtering update



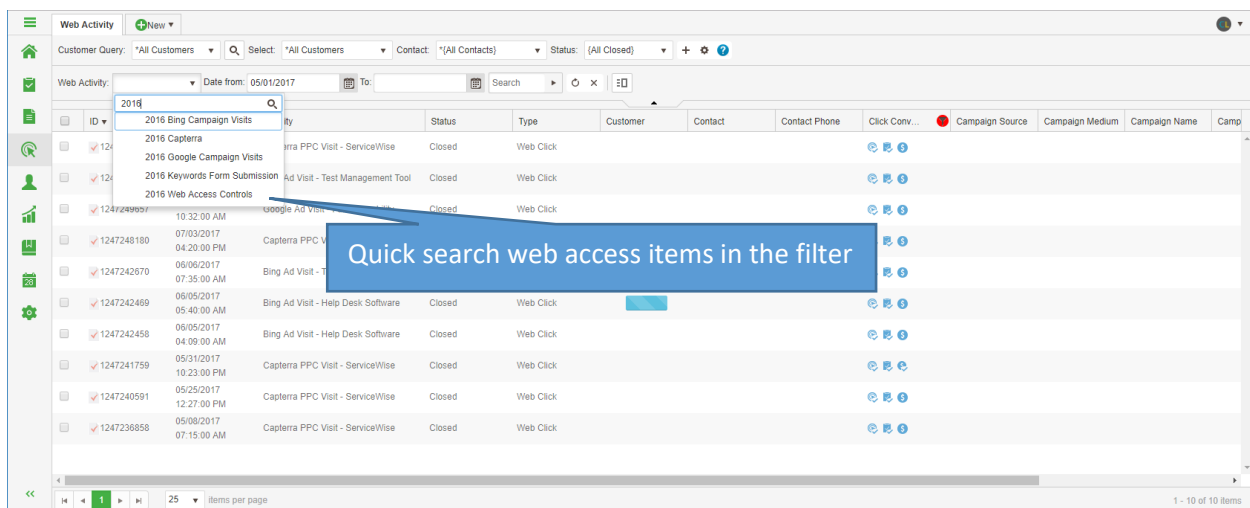
option to only includes active items

ID	Date	Activity	Status	Type	Campaign Name
1247251475	07/19/2017 02:33:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click	
1247250326	07/13/2017 08:31:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click	
1247249657	07/10/2017 10:32:00 AM	Google Ad Visit - Full Traceability	Closed	Web Click	
1247248180	07/03/2017 04:20:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click	
1247242670	06/06/2017 07:35:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click	
1247242469	06/05/2017 05:40:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click	
1247242458	06/05/2017 04:09:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click	
1247241759	05/31/2017 10:23:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click	
1247240591	05/25/2017 12:27:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click	
1247236858	05/08/2017 07:15:00 AM	Capterra PPC Visit - ServiceWise	Closed	Web Click	



List by web click group

ID	Date	Activity	Status	Type	Customer	Contact	Contact Phone	Click Conv...	Campaign Source	Campaign Medium	Campaign Name	Camp
1247251475	07/19/2017 02:33:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247250326	07/13/2017 08:31:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click								
1247249657	07/10/2017 10:32:00 AM	Google Ad Visit - Full Traceability	Closed	Web Click								
1247248180	07/03/2017 04:20:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247242670	06/06/2017 07:35:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click								
1247242469	06/05/2017 05:40:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click								
1247242458	06/05/2017 04:09:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click								
1247241759	05/31/2017 10:23:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247240591	05/25/2017 12:27:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247236858	05/08/2017 07:15:00 AM	Capterra PPC Visit - ServiceWise	Closed	Web Click								



Quick search web access items in the filter

ID	Date	Activity	Status	Type	Customer	Contact	Contact Phone	Click Conv...	Campaign Source	Campaign Medium	Campaign Name	Camp
1247251475	07/19/2017 02:33:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247250326	07/13/2017 08:31:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click								
1247249657	07/10/2017 10:32:00 AM	Google Ad Visit - Full Traceability	Closed	Web Click								
1247248180	07/03/2017 04:20:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247242670	06/06/2017 07:35:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click								
1247242469	06/05/2017 05:40:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click								
1247242458	06/05/2017 04:09:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click								
1247241759	05/31/2017 10:23:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247240591	05/25/2017 12:27:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247236858	05/08/2017 07:15:00 AM	Capterra PPC Visit - ServiceWise	Closed	Web Click								

Web Activity tool bar settings are remembered

The screenshot shows the 'Web Activity' tool bar with the following settings: Customer Query: 'All Customers', Select: 'All Customers', Contact: 'All Contacts', Status: 'All Closed'. The 'Web Activity' dropdown is set to '2016 Google ...' and the 'Date from' is '05/01/2017'. The 'To' field is empty. The 'Search' button is highlighted. The table below shows a single row of activity:

ID	Date	Activity	Status	Type	Customer	Contact	Contact Phone	Click Conv...	Campaign Source	Campaign Medium	Campaign Name	Camp
1247249657	07/10/2017 10:32:00 AM	Google Ad Visit - Full Traceability	Closed	Web Click								

Ability to show click conversions and filter on conversion targets

The screenshot shows the 'Web Activity' tool bar with the same settings as the previous screenshot. The 'Click Conv...' column is highlighted, and a dropdown menu is open showing the following options: 'Filter items with value that: Equal to', 'Sales opportunity cre...', 'Sales opportunity created', 'Sales event created', and 'Form submitted'. The table below shows a single row of activity:

ID	Date	Activity	Status	Type	Customer	Contact	Contact Phone	Click Conv...	Campaign Source	Campaign Medium	Campaign Name	Camp
1247249657	07/10/2017 10:32:00 AM	Google Ad Visit - Full Traceability	Closed	Web Click								

Web click detail view with linked landing page

The screenshot shows the 'Web Click' detail view for activity ID 1247249659. The 'Target URL' is highlighted with a red box and the text 'click to view'. The 'If closed' checkbox is checked. The 'Follow-up Incident' section shows a table with the following data:

ID	Title	Type	Start Date	Due Date	If open
15005	Lead Tracking			07/19/2017	Closed

The 'Description' field contains the following text: '****Escalation (No progress) - Auto-Reassignment****', '****Escalation (No progress) - Auto-Reassignment****', and '[Closed by Brian Jones -- 07/19/17 06:39 PM]'. The 'Customer Info' section shows buttons for 'Change Customer', 'Create Contact', and 'Select Contact'. The 'Contacts' section is empty.

Web click item conversion target improvement

Web Activity

Customer Query: *All Customers Select: *All Customers Contact: *(All Contacts) Status: (All Closed)

Web Activity: *All web click... Date from: 05/01/2017 To: Search

ID	Date	Activity	Status	Type	Customer	Contact	Contact Phone	Click Conv.	Campaign Source	Campaign Medium	Campaign Name	Campaign
1247251475	07/19/2017 02:33:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247250326	07/13/2017 08:31:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click								
1247249657	07/10/2017 10:32:00 AM	Google Ad Visit - Full Traceability	Closed	Web Click								
1247248180	07/03/2017 04:20:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247242670	06/06/2017 07:35:00 AM	Bing Ad Visit - Test Management Tool	Closed	Web Click								
1247242469	06/05/2017 05:40:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click								
1247242458	06/05/2017 04:09:00 AM	Bing Ad Visit - Help Desk Software	Closed	Web Click								
1247241759	05/31/2017 10:23:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247240591	05/25/2017 12:27:00 PM	Capterra PPC Visit - ServiceWise	Closed	Web Click								
1247236858	05/08/2017 07:15:00 AM	Capterra PPC Visit - ServiceWise	Closed	Web Click								

https://internal.techexcel.com/CustomerWise/WebClickView.aspx?curprojectid=18#

1 - 10 of 10 items

Web Activity - 1247251205

Current Item: 1247251205 1 / 26

Web Click Customer Note/File Web Activity Quick Reports Assets

Customer: *Unknown

Activity: Keyword Demo - Test Management

Date: 07/18/2017 11:00:00 AM

Address: Please select a project

Project: Lead Management

Target URL: ☒ OK Cancel

Follow-up Incident

ID	Title	Type	Start Date	Due Date	If open
----	-------	------	------------	----------	---------

Create New

Customer Info: Create Customer Select Customer Create Contact Select Contact

1 - 25 of 56 items

Customer View

New customer/employee view with ultra-fast toggling

Employee Incident - 1354 X Incident - 1638 X

Employee Query: *All Employees View: New employee view Search

Employee	Phone	Location	Division	Site
Raymond Nathan	(925)871-3912	85 - Rm 221	Division - Northern California	Corporate - California
Peter Orlando	434-897-4567	82-Rm501	Division - Northern California	Corporate - California
Anna Hardaway	434-897-9900	82-Rm301	Division - Northern California	Corporate - California
Bill D			Division - Northern California	Corporate - California
Robert			Division - Northern California	Corporate - California
Dan			Division - Northern California	Corporate - California
John			Division - Northern California	Corporate - California
Oscar White	408-356-3600	83-Rm103	Division - Northern California	Corporate - California
Peter Folger	408-356-3600		Division - Northern California	Corporate - California
Leo Doble	434-897-4567	83-Rm103	Division - Northern California	Corporate - California

Ultra-fast detail information loading when you are toggling through the customer or employee list view use keyboard 'arrow'

Employee Info

First Name: Peter Last Name: Orlando

Title: CEO Job Role: CEO

Phone: 434-897-4567 Cell Phone:

User ID: Employee Status: CEO

Date of Hire: 11/10/13 Attention:

Site: Corporate - California Division: Division - Northern California

Department: Group:

Location: Employee Mana:

Survey Option: Subscribed

Location: Edit Address

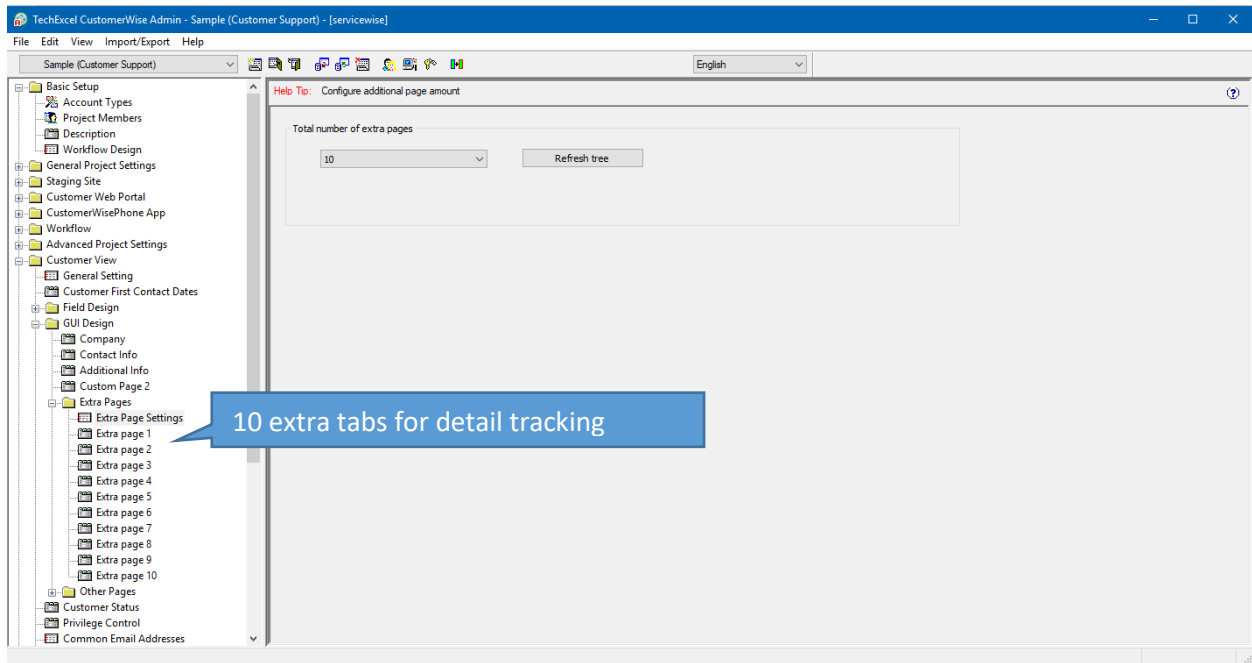
Address: 3400 1st Street

City: San Jose State: CA

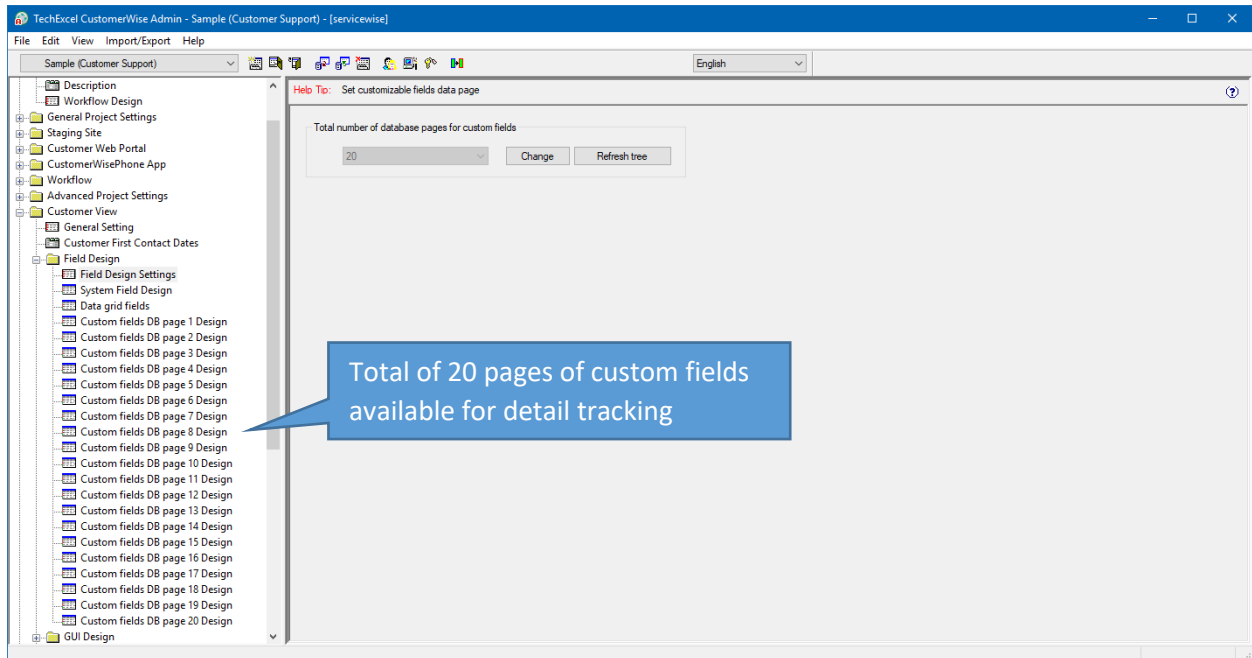
Zip: 94506 Country: USA

1 - 10 of 18 items

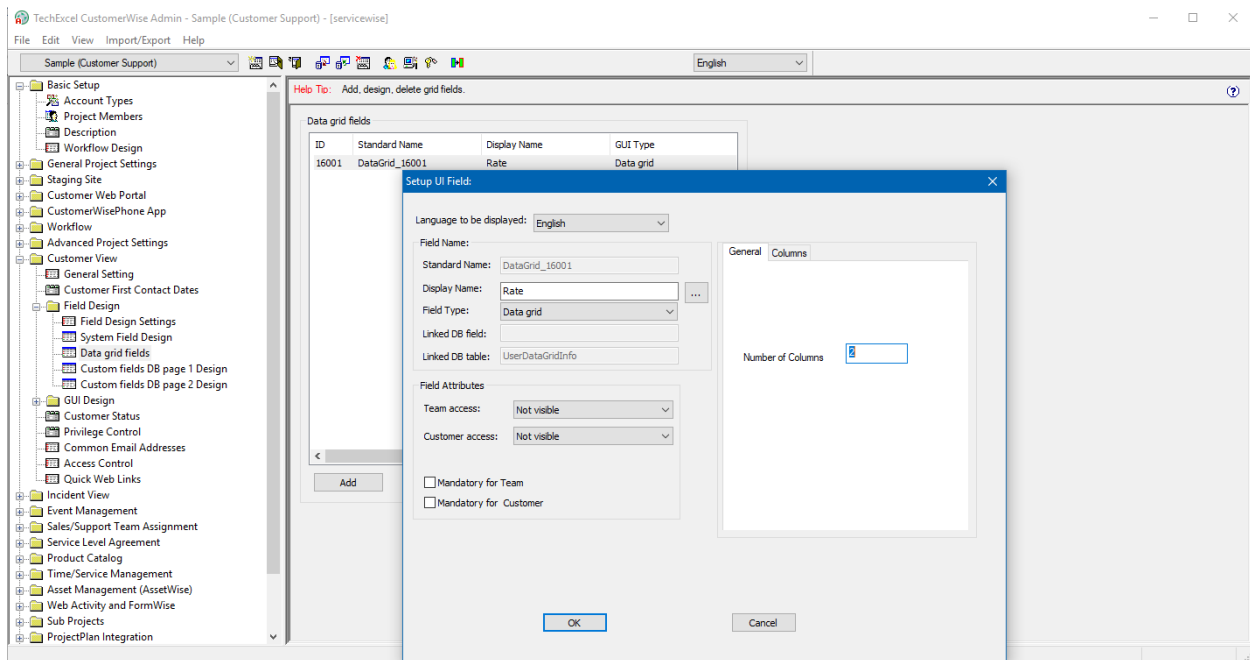
Additional tabs in Customer



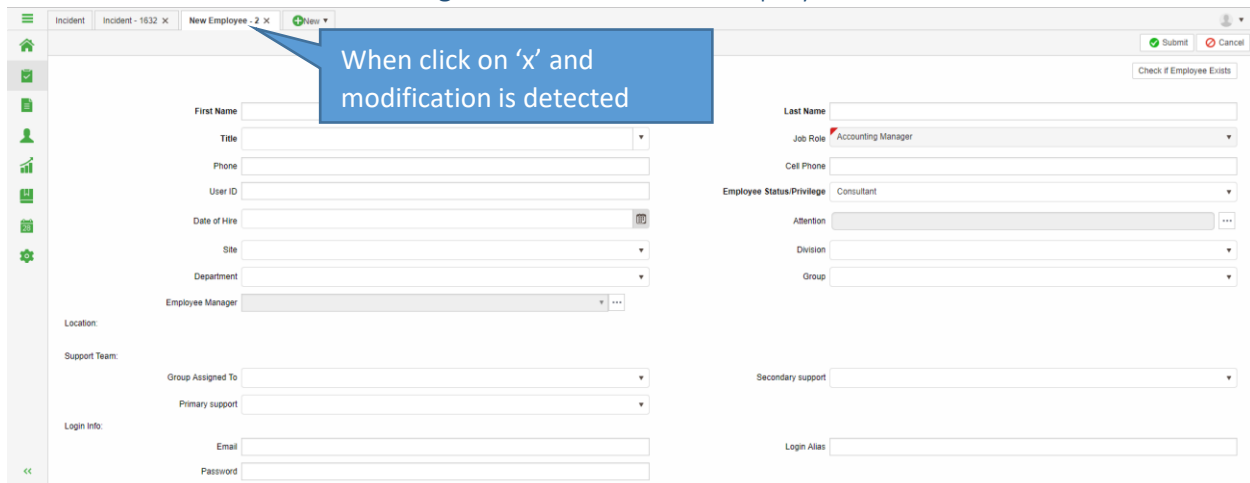
Additional fields in Customer view

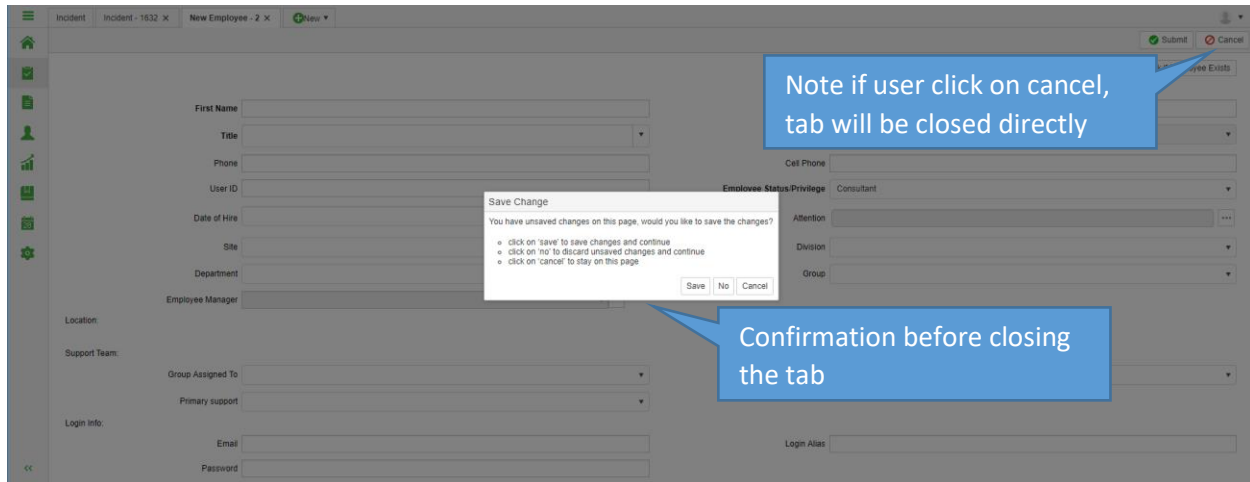


Data Grid available in customer view



Confirmation before discard changes when create new employee/customer





First Name

Title

Phone

User ID

Date of Hire

Site

Department

Employee Manager

Location

Support Team

Group Assigned To

Primary support

Login Info

Email

Password

Cell Phone

Employee Status/Privilege

Attention

Division

Group

Save Change

You have unsaved changes on this page, would you like to save the changes?

- click on 'save' to save changes and continue
- click on 'no' to discard unsaved changes and continue
- click on 'cancel' to stay on this page

Save No Cancel

Note if user click on cancel, tab will be closed directly

Confirmation before closing the tab

Employee Web Portal

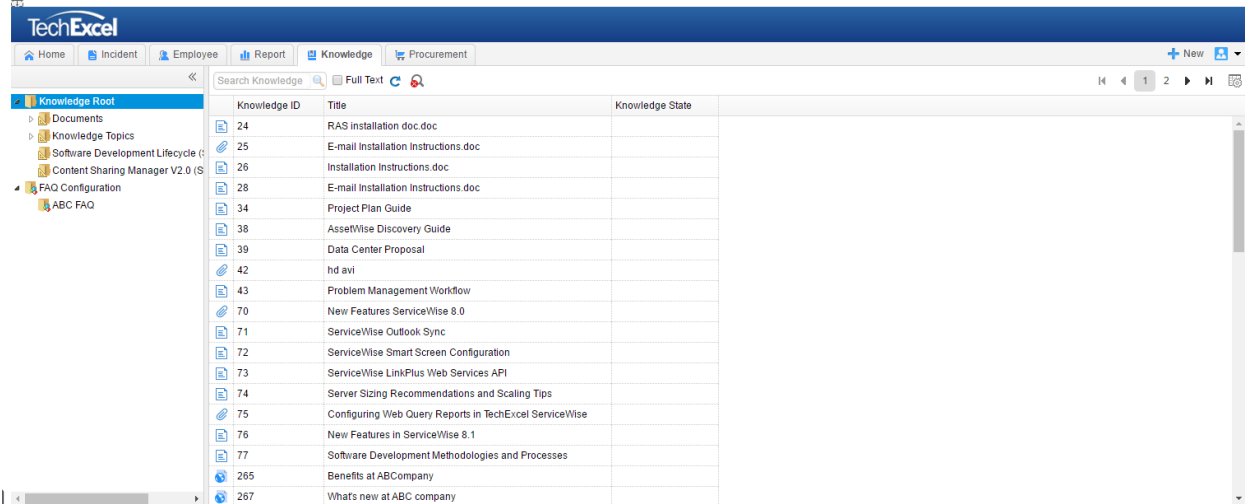
Support single sign on directly to knowledge view

Singel Sign On sample url: <http://charley-deskpc/scripts/txexcel/ServiceWise/CLogin.dll?singlesignon?keystr=anna-h&email=anna-h&viewID=4&ProjectID=16>

DB pre-condition: insert into SSOKeys (BaseProjectID, Username,EmailAddress,KeyString,DateCreated)

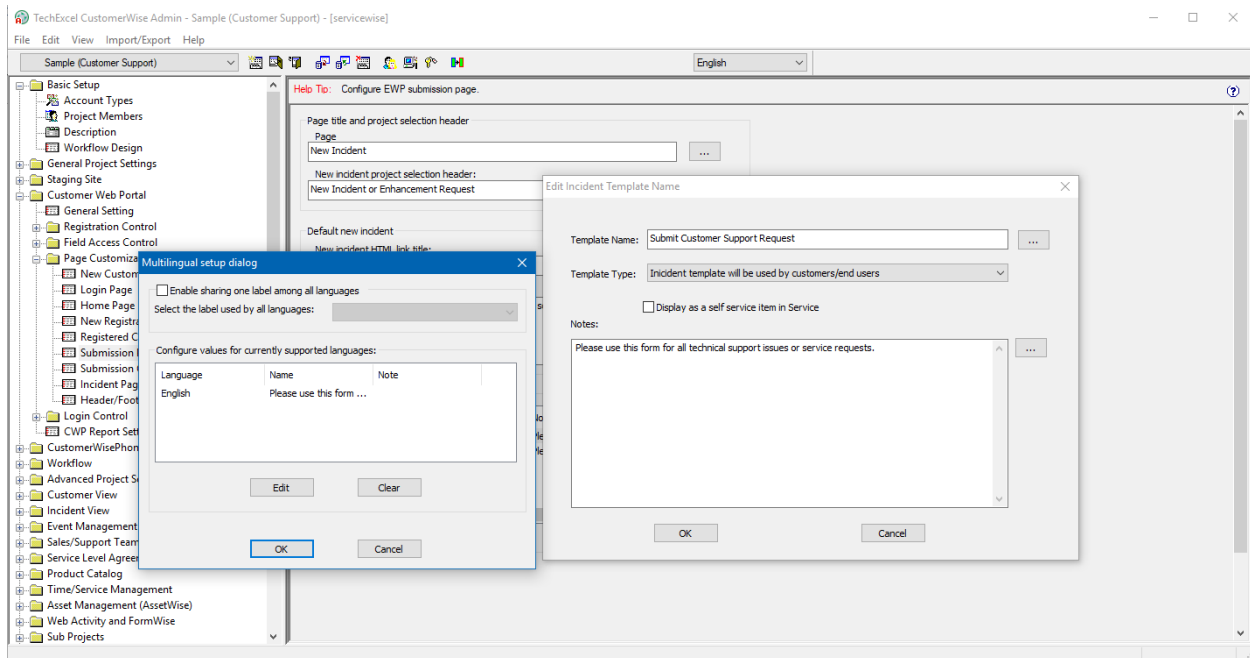
values ('15','anna-h','anna-h','anna-h','2017-05-26 00:00:00.000')

GO



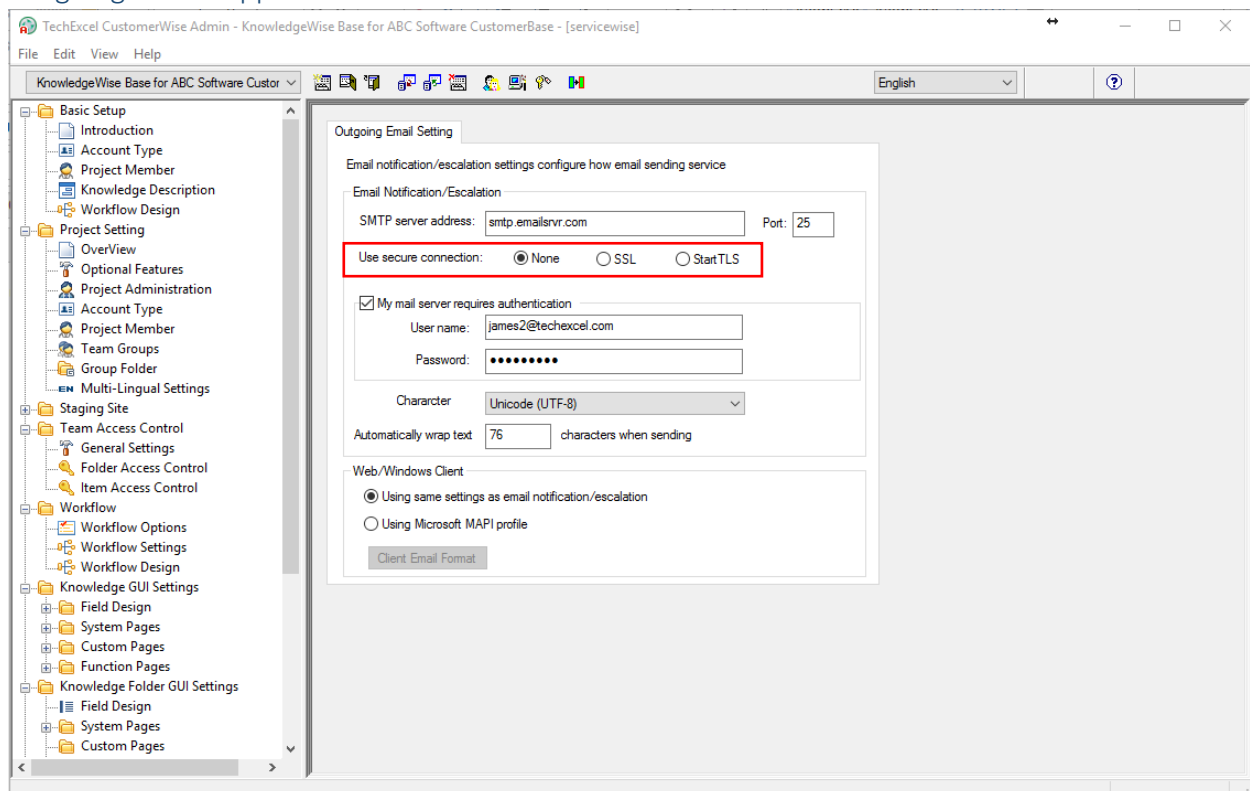
Knowledge ID	Title	Knowledge State
24	RAS Installation doc.doc	
25	E-mail Installation Instructions.doc	
26	Installation Instructions.doc	
28	E-mail Installation Instructions.doc	
34	Project Plan Guide	
38	AssetWise Discovery Guide	
39	Data Center Proposal	
42	hd avi	
43	Problem Management Workflow	
70	New Features ServiceWise 8.0	
71	ServiceWise Outlook Sync	
72	ServiceWise Smart Screen Configuration	
73	ServiceWise LinkPlus Web Services API	
74	Server Sizing Recommendations and Scaling Tips	
75	Configuring Web Query Reports in TechExcel ServiceWise	
76	New Features in ServiceWise 8.1	
77	Software Development Methodologies and Processes	
265	Benefits at ABCcompany	
267	Whats new at ABC company	

Multilingual support for incident template note and name



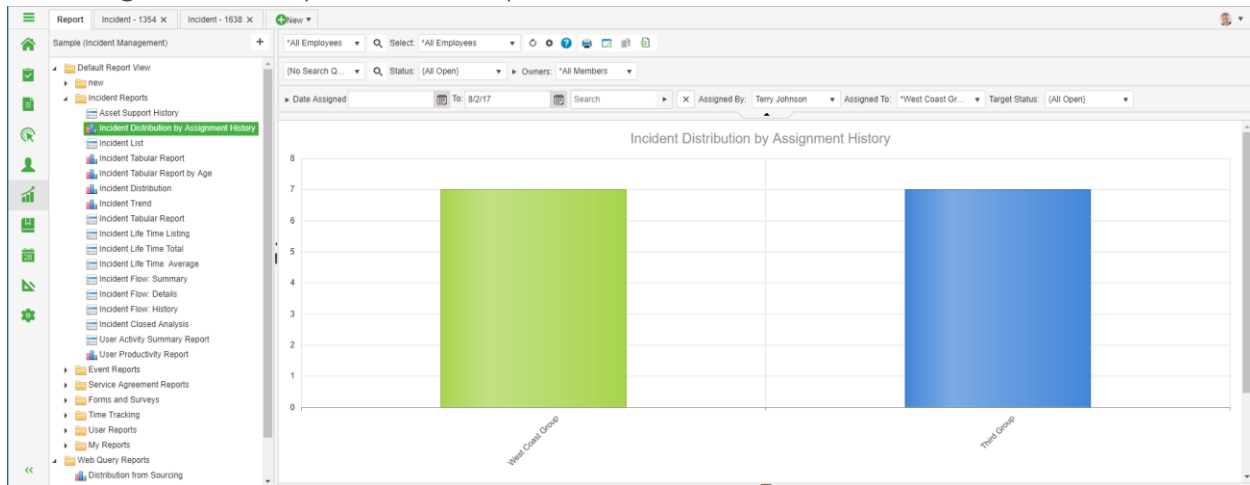
Knowledge

Outgoing email support secure connection to SMTP server

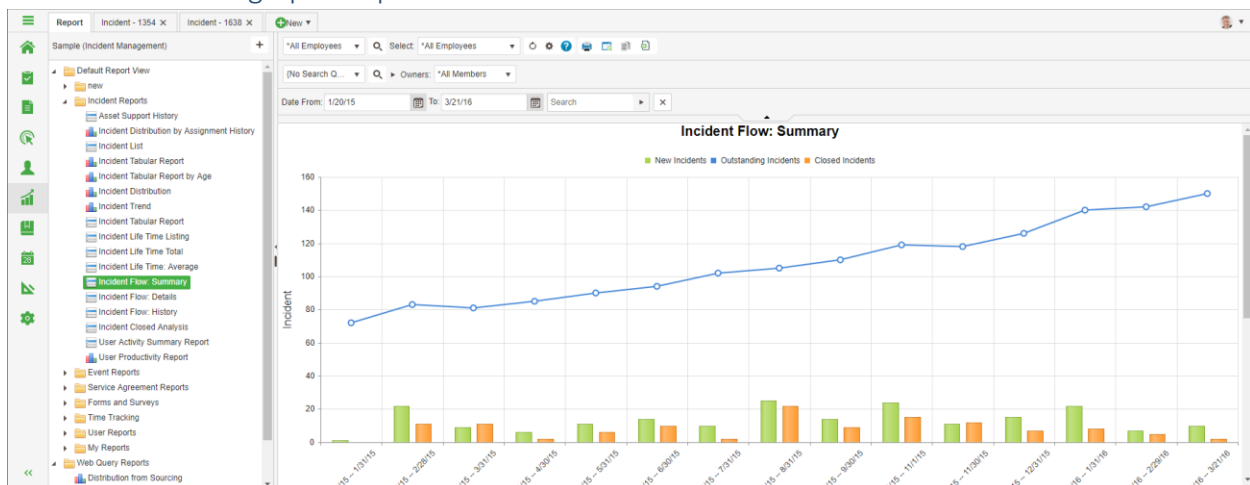


Report View

New assignment history distribution report



New Incident flow graphic report

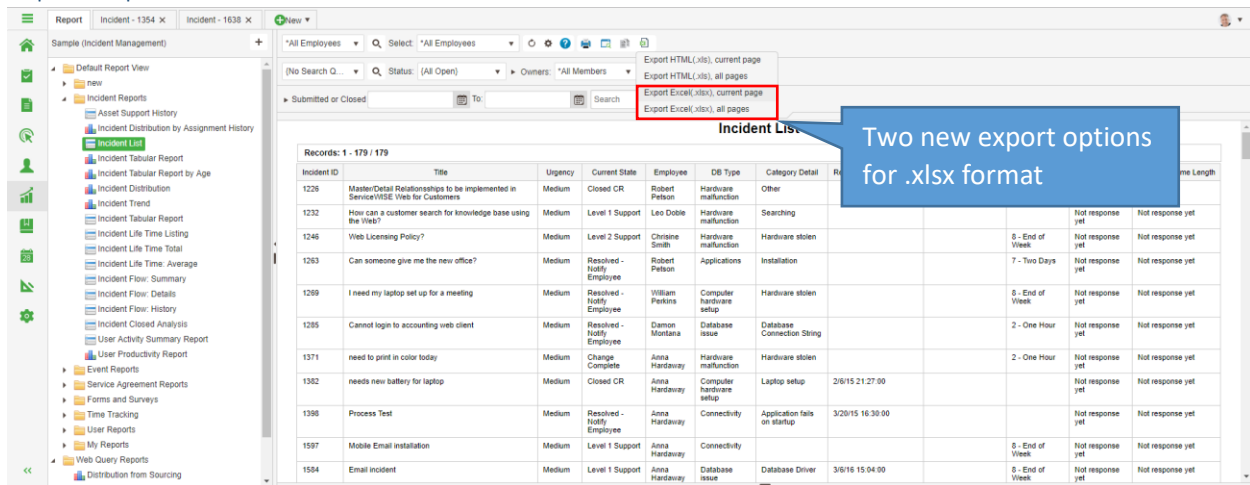


SLA change history report

This table provides a detailed history of SLA changes. It includes columns for Incident ID, Title, Service Plan, SLA Response Time Plan, Team, Current Owner Group, Current Owner, Reopen, SLA Start Time, Required Response Time, Response Time, SLA Response Time Length, Total Response Time In Progress, Is Within SLA Response Time, Response Time Delta, Required Resolve Time, and R.

Incident ID	Title	Service Plan	SLA Response Time Plan	Team	Current Owner Group	Current Owner	Reopen	SLA Start Time	Required Response Time	Response Time	SLA Response Time Length	Total Response Time In Progress	Is Within SLA Response Time	Response Time Delta	Required Resolve Time	R
1335	cannot access any email attachments sent to me	Urgent Issue				Terry Johnson	No	1/26/14 14:40:00								
1332	CRM application crash on login	Urgent Issue				Terry Johnson	No	1/17/14 15:51:00								
1329	application crash on login	Urgent Issue				Terry Johnson	No	1/17/14 15:51:00								
1326	new software	Urgent Issue				Terry Johnson	No	1/16/14 15:14:00								
1325	Standard Software Installation Request	Urgent Issue				Terry Johnson	No	1/16/14 14:47:00								
1315	e-mail installation	Urgent Issue				Terry Johnson	No	10/26/13 17:57:00								
1309	new e-mail problem	Urgent Issue				Terry Johnson	No	10/26/13 14:48:00		11/28/13 15:45:00						
1308	e-mail installation issue	Urgent Issue				Terry Johnson	No	10/26/13 14:32:00								
1306	e-mail installation issue	Urgent Issue				Terry Johnson	No	10/25/13 15:53:00								

Export report in native excel format

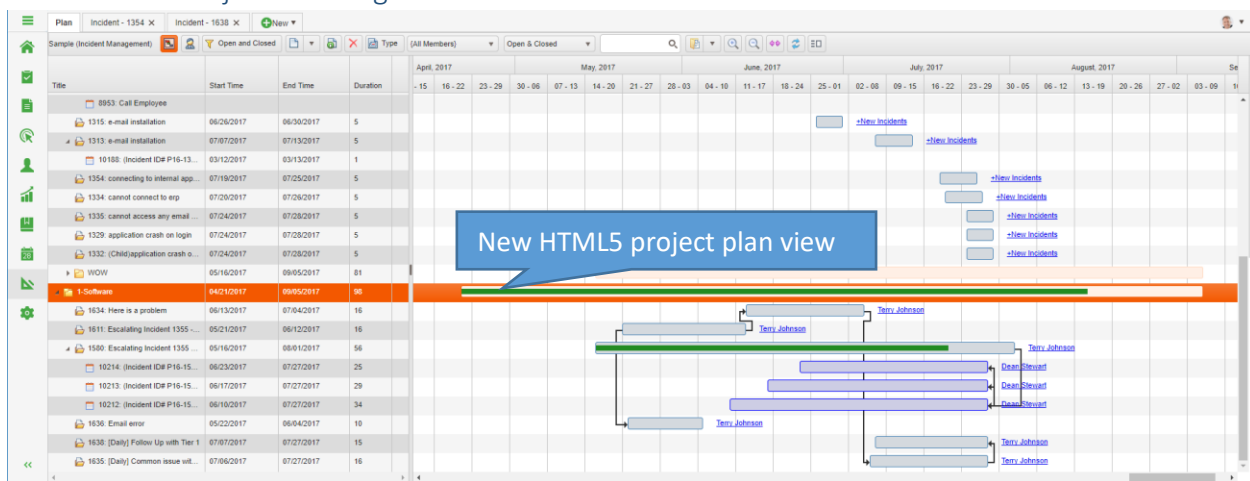


Two new export options for .xlsx format

Incident ID	Title	Urgency	Current State	Employee	DB Type	Category Detail	Resolution	Response Length
1226	Master/Detail Relationships to be implemented in Service/IDE Web for Customers	Medium	Closed CR	Robert Peterson	Hardware malfunction	Other		
1232	How can a customer search for knowledge base using the Web?	Medium	Level 1 Support	Leo Dobie	Hardware malfunction	Searching		Not response yet
1246	Web Licensing Policy?	Medium	Level 2 Support	Christine Smith	Hardware malfunction	Hardware stolen		Not response yet
1263	Can someone give me the new office?	Medium	Resolved - Notify Employee	Robert Peterson	Applications	Installation	7 - Two Days	Not response yet
1289	I need my laptop set up for a meeting	Medium	Resolved - Notify Employee	William Perkins	Computer hardware setup	Hardware stolen	8 - End of Week	Not response yet
1285	Cannot login to accounting web client	Medium	Resolved - Notify Employee	Damon Montana	Database issue	Database Connection String	2 - One Hour	Not response yet
1371	need to print in color today	Medium	Change Complete	Anna Hardaway	Hardware malfunction	Hardware stolen	2 - One Hour	Not response yet
1362	needs new battery for laptop	Medium	Closed CR	Anna Hardaway	Computer hardware setup	Laptop setup	2/6/15 21:27:00	Not response yet
1366	Process Test	Medium	Resolved - Notify Employee	Anna Hardaway	Connectivity	Application fails on startup	3/20/15 16:30:00	Not response yet
1587	Mobile Email installation	Medium	Level 1 Support	Anna Hardaway	Connectivity			Not response yet
1584	Email incident	Medium	Level 1 Support	Anna Hardaway	Database issue	Database Driver	3/6/15 15:04:00	Not response yet

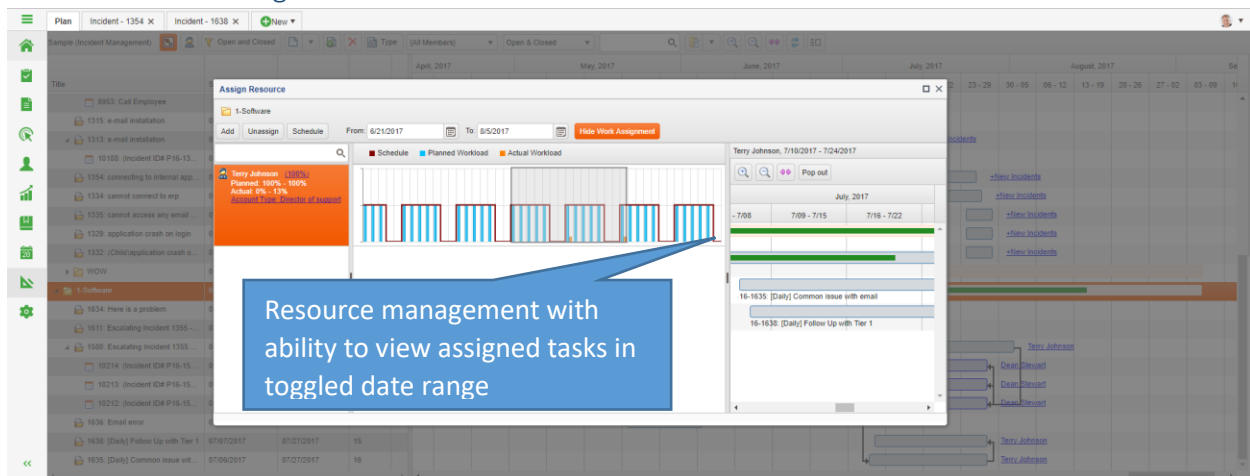
Project Plan View

New HTML 5 Project Planning View



New HTML5 project plan view

New Resource Management module



Resource management with ability to view assigned tasks in toggled date range

New project roll up summary

The screenshot shows the 'Edit Sub Project' dialog box with the 'Project Roll up Summary' section highlighted. The summary includes the following data:

Field	Value
Spent	1W 3H
Remaining	1D
Total	1W 1D 3H
Percentage	84.31%
Estimate finish date	

Applicable owner same as sub-project team option

The screenshot shows the 'Edit Sub Project' dialog box with the 'Applicable Owners' tab selected. The 'Same as sub-project team' option is highlighted with a red box. Below this, a table lists applicable team members:

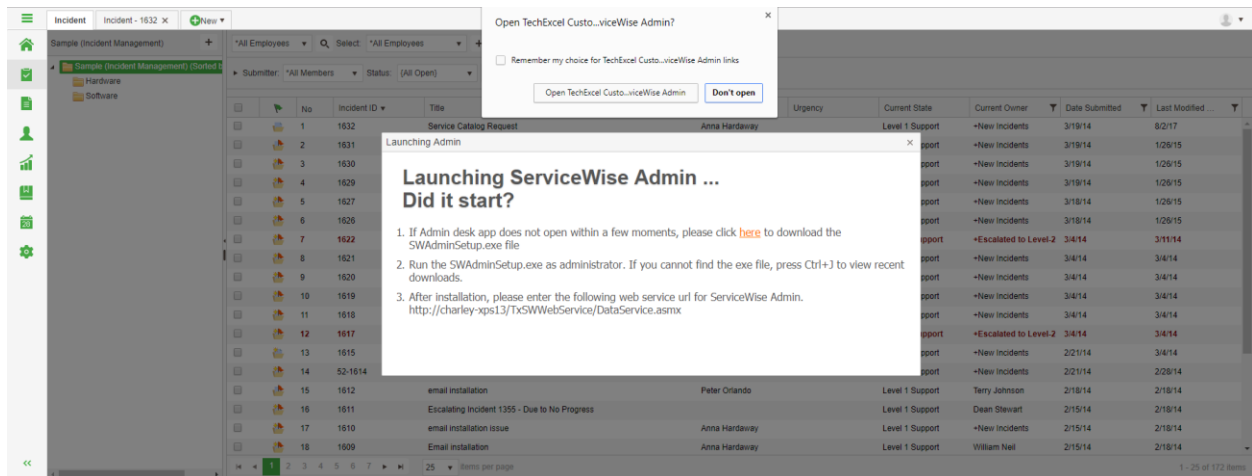
Team Member	Account Type	Phone	Email
John Duncan	Director of support	(408)555-5555	JDuncan@abcsotf.com
Matt Peterson	Level I support	(408)111-2222	MPeterson@abcsotf.com
Pamela Miller	Level I support	(408)111-3333	PMiller@abcsotf.com
Paul Wagner	Level II support	(408)111-5555	PWagner@abcsotf.com
Terry Johnson	Director of support	(408)222-1111	terry@abcsotf.com
Tim Simpson	Level I support	(408)222-3333	TSimpson@abcsotf.com
William Neil	Level II support	925-283-8930	WNeil@abcsotf.com

Convenience feature UX

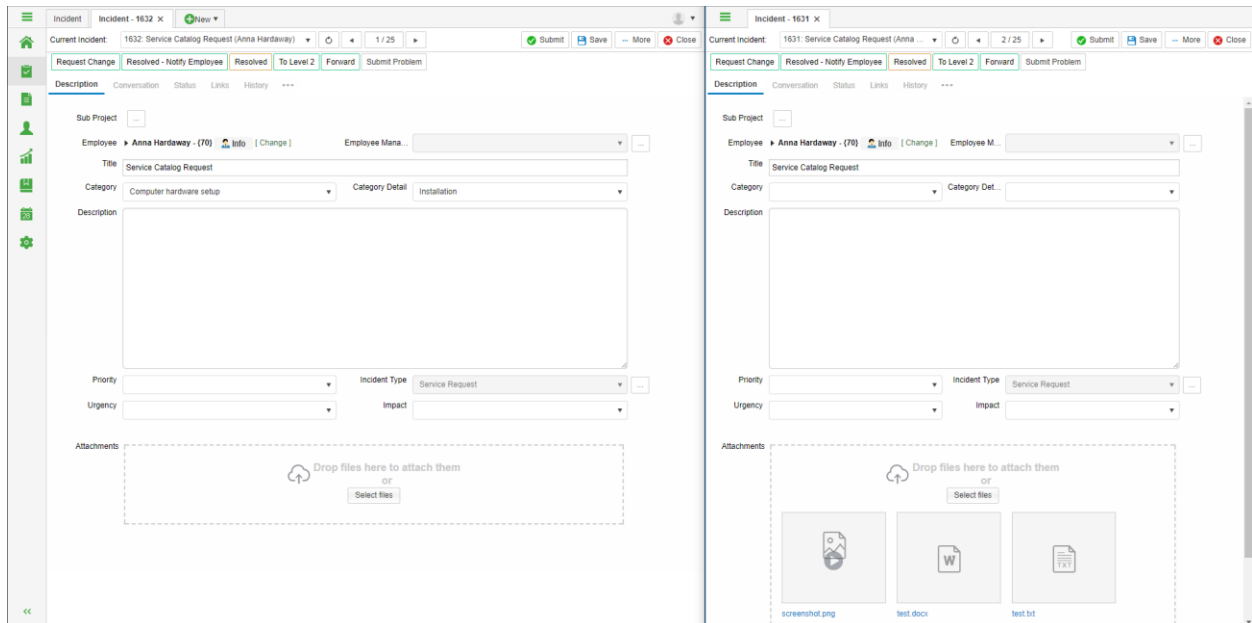
Open Admin directly from web browser

The screenshot shows the TechExcel web interface with a list of incidents. The 'Admin' link in the right-hand menu is highlighted. The incident list is as follows:

No	Incident ID	Title	Employee	Urgency	Current State	Current Owner	Date Submitted
1	1632	Service Catalog Request	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14
2	1631	Service Catalog Request	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14
3	1630	iPhone broken	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14
4	1629	Router issue	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14
5	1627	Service Catalog Request	Anna Hardaway		Level 1 Support	+New Incidents	3/19/14
6	1626	Service Order Request	Anna Hardaway		Level 1 Support	+New Incidents	3/18/14
7	1622	email error 1404	Anna Hardaway	Business Critical	Level 1 Support	+Escalated to Level-2	3/11/14
8	1621	Email error code 5454	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14
9	1620	Email error	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14
10	1619	Router issue prompt	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14
11	1618	Email prompt issue	Anna Hardaway		Level 1 Support	+New Incidents	3/4/14
12	1617	incident report test	Anna Hardaway	Business Critical	Level 1 Support	+Escalated to Level-2	3/4/14
13	1615	VPN issue	Anna Hardaway		Level 1 Support	+New Incidents	2/21/14
14	52-1614	Router issue	Anna Hardaway		Level 1 Support	+New Incidents	2/21/14
15	1612	email installation	Peter Orlando		Level 1 Support	Terry Johnson	2/18/14
16	1611	Escalating Incident 1355 - Due to No Progress			Level 1 Support	Dean Stewart	2/15/14
17	1610	email installation issue	Anna Hardaway		Level 1 Support	+New Incidents	2/15/14
18	1609	email installation	Anna Hardaway		Level 1 Support	William Neil	2/15/14



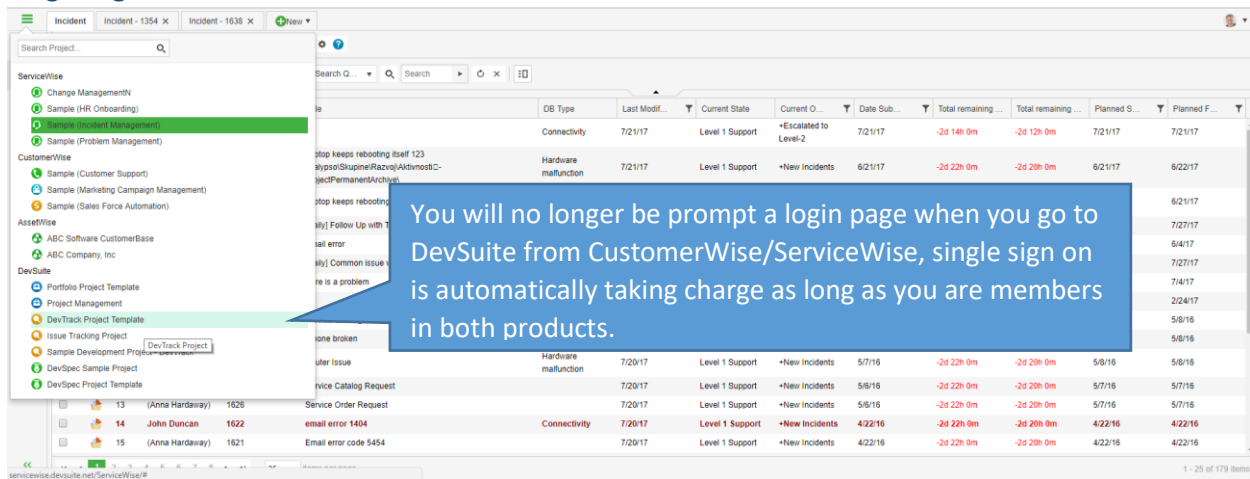
Second window



Search against merged Incident id to find target incident

When incidents are merged into a target incident, search on the merged incident will return the target incident even if the merged incident is no longer in the system.

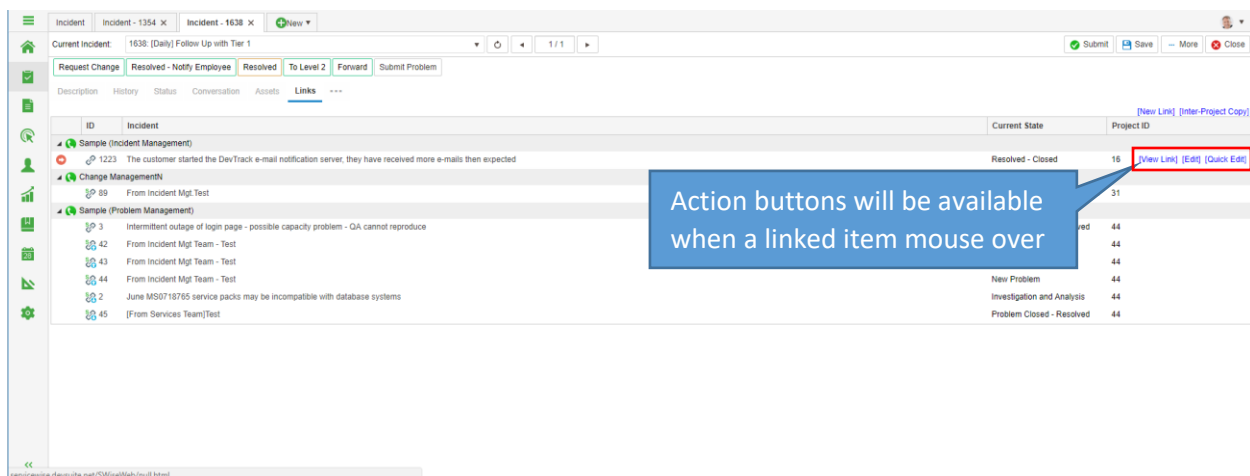
Single Sign On now works between DevSuite and CustomerWise/ServiceWise



You will no longer be prompt a login page when you go to DevSuite from CustomerWise/ServiceWise, single sign on is automatically taking charge as long as you are members in both products.

ID	DB Type	Last Modif...	Current State	Current O...	Date Sub...	Total remaining ...	Total remaining ...	Planned S...	Planned F...
13	Connectivity	7/21/17	Level 1 Support	+Escalated to Level-2	7/21/17	-2d 14h 0m	-2d 12h 0m	7/21/17	7/21/17
14	Hardware malfunction	7/21/17	Level 1 Support	+New Incidents	6/21/17	-2d 22h 0m	-2d 20h 0m	6/21/17	6/21/17
15	Hardware malfunction	7/20/17	Level 1 Support	+New Incidents	5/7/16	-2d 22h 0m	-2d 20h 0m	5/7/16	5/7/16
16	Connectivity	7/20/17	Level 1 Support	+New Incidents	5/6/16	-2d 22h 0m	-2d 20h 0m	5/7/16	5/7/16
17	Connectivity	7/20/17	Level 1 Support	+New Incidents	4/22/16	-2d 22h 0m	-2d 20h 0m	4/22/16	4/22/16
18	Connectivity	7/20/17	Level 1 Support	+New Incidents	4/22/16	-2d 22h 0m	-2d 20h 0m	4/22/16	4/22/16

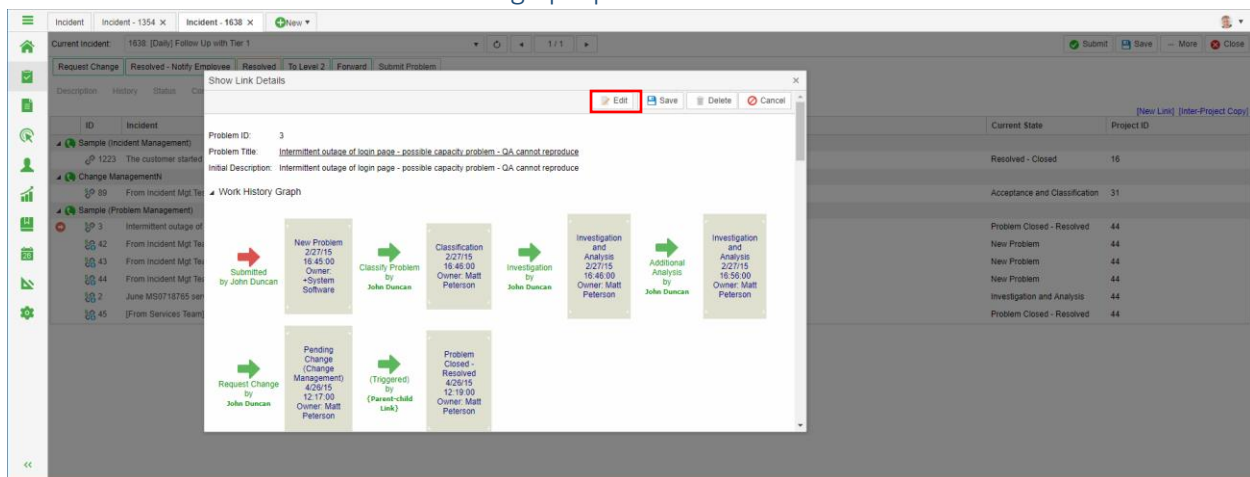
Linked incident with mouse over edit



Action buttons will be available when a linked item mouse over

ID	Incident	Current State	Project ID
13	Sample (Incident Management)	Resolved - Closed	16
14	Change Management	Resolved - Closed	31
15	Sample (Problem Management)	Resolved - Closed	44
16	Sample (Problem Management)	Resolved - Closed	44
17	Sample (Problem Management)	Resolved - Closed	44
18	Sample (Problem Management)	Resolved - Closed	44
19	Sample (Problem Management)	Resolved - Closed	44
20	Sample (Problem Management)	Resolved - Closed	44
21	Sample (Problem Management)	Resolved - Closed	44
22	Sample (Problem Management)	Resolved - Closed	44
23	Sample (Problem Management)	Resolved - Closed	44
24	Sample (Problem Management)	Resolved - Closed	44
25	Sample (Problem Management)	Resolved - Closed	44
26	Sample (Problem Management)	Resolved - Closed	44
27	Sample (Problem Management)	Resolved - Closed	44
28	Sample (Problem Management)	Resolved - Closed	44
29	Sample (Problem Management)	Resolved - Closed	44
30	Sample (Problem Management)	Resolved - Closed	44
31	Sample (Problem Management)	Resolved - Closed	44
32	Sample (Problem Management)	Resolved - Closed	44
33	Sample (Problem Management)	Resolved - Closed	44
34	Sample (Problem Management)	Resolved - Closed	44
35	Sample (Problem Management)	Resolved - Closed	44
36	Sample (Problem Management)	Resolved - Closed	44
37	Sample (Problem Management)	Resolved - Closed	44
38	Sample (Problem Management)	Resolved - Closed	44
39	Sample (Problem Management)	Resolved - Closed	44
40	Sample (Problem Management)	Resolved - Closed	44
41	Sample (Problem Management)	Resolved - Closed	44
42	Sample (Problem Management)	Resolved - Closed	44
43	Sample (Problem Management)	Resolved - Closed	44
44	Sample (Problem Management)	Resolved - Closed	44
45	Sample (Problem Management)	Resolved - Closed	44

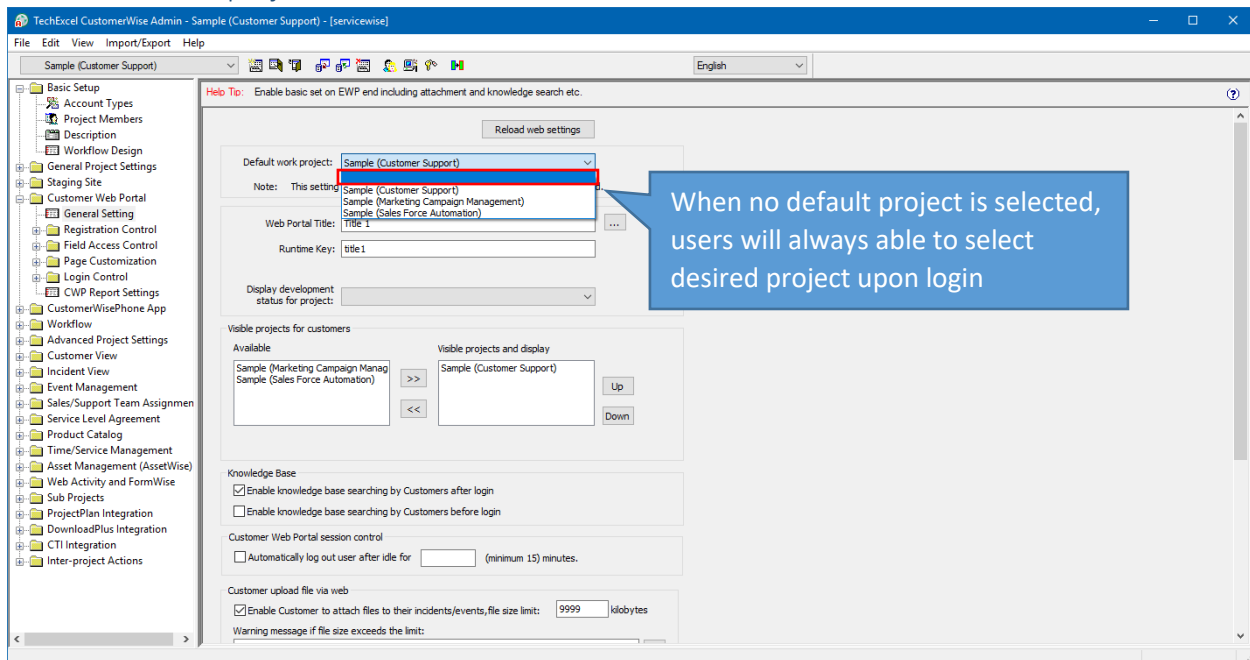
Edit button is available when view linkage properties



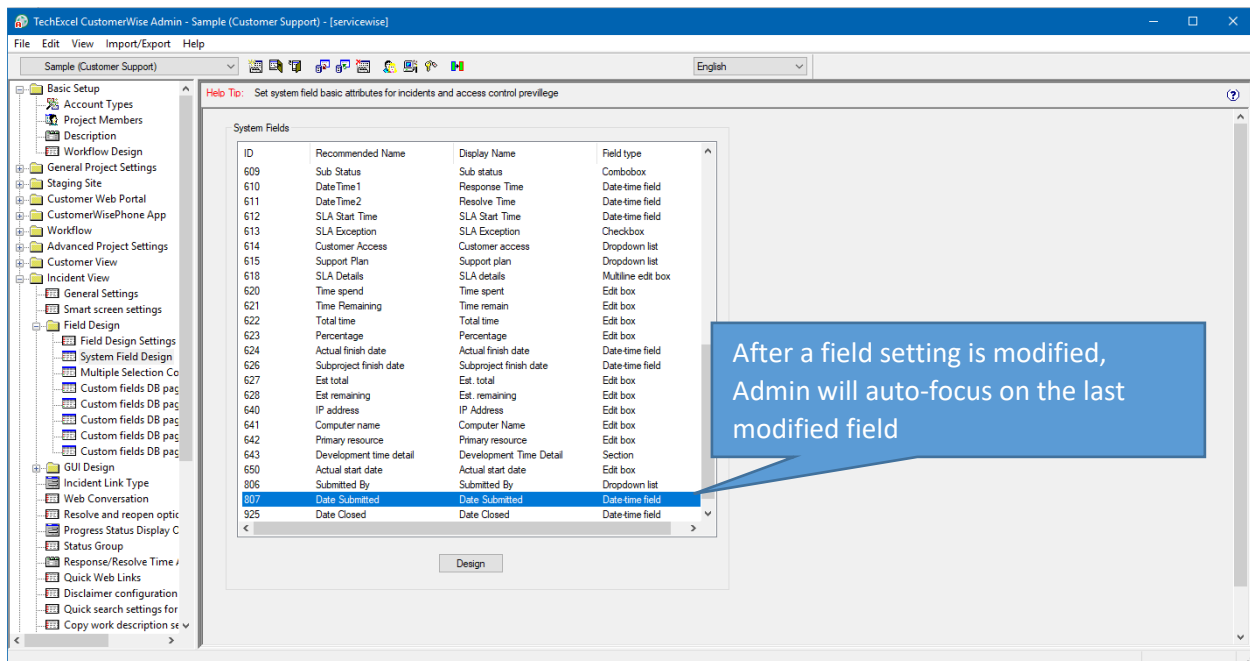
Edit button is available when view linkage properties

ID	Incident	Current State	Project ID
13	Sample (Incident Management)	Resolved - Closed	16
14	Change Management	Resolved - Closed	31
15	Sample (Problem Management)	Resolved - Closed	44
16	Sample (Problem Management)	Resolved - Closed	44
17	Sample (Problem Management)	Resolved - Closed	44
18	Sample (Problem Management)	Resolved - Closed	44
19	Sample (Problem Management)	Resolved - Closed	44
20	Sample (Problem Management)	Resolved - Closed	44
21	Sample (Problem Management)	Resolved - Closed	44
22	Sample (Problem Management)	Resolved - Closed	44
23	Sample (Problem Management)	Resolved - Closed	44
24	Sample (Problem Management)	Resolved - Closed	44
25	Sample (Problem Management)	Resolved - Closed	44
26	Sample (Problem Management)	Resolved - Closed	44
27	Sample (Problem Management)	Resolved - Closed	44
28	Sample (Problem Management)	Resolved - Closed	44
29	Sample (Problem Management)	Resolved - Closed	44
30	Sample (Problem Management)	Resolved - Closed	44
31	Sample (Problem Management)	Resolved - Closed	44
32	Sample (Problem Management)	Resolved - Closed	44
33	Sample (Problem Management)	Resolved - Closed	44
34	Sample (Problem Management)	Resolved - Closed	44
35	Sample (Problem Management)	Resolved - Closed	44
36	Sample (Problem Management)	Resolved - Closed	44
37	Sample (Problem Management)	Resolved - Closed	44
38	Sample (Problem Management)	Resolved - Closed	44
39	Sample (Problem Management)	Resolved - Closed	44
40	Sample (Problem Management)	Resolved - Closed	44
41	Sample (Problem Management)	Resolved - Closed	44
42	Sample (Problem Management)	Resolved - Closed	44
43	Sample (Problem Management)	Resolved - Closed	44
44	Sample (Problem Management)	Resolved - Closed	44
45	Sample (Problem Management)	Resolved - Closed	44

Allow no-default project for CWP



Auto-focus on last modified field in Admin



Power search (formerly keyword go to)

When tool bar filters are folded, power search helps quickly find item by matching title and id while discard any conditions on the tool bar. Power search will be enhanced to match keyword in description in the future.

Right click on sub-project with auto-select

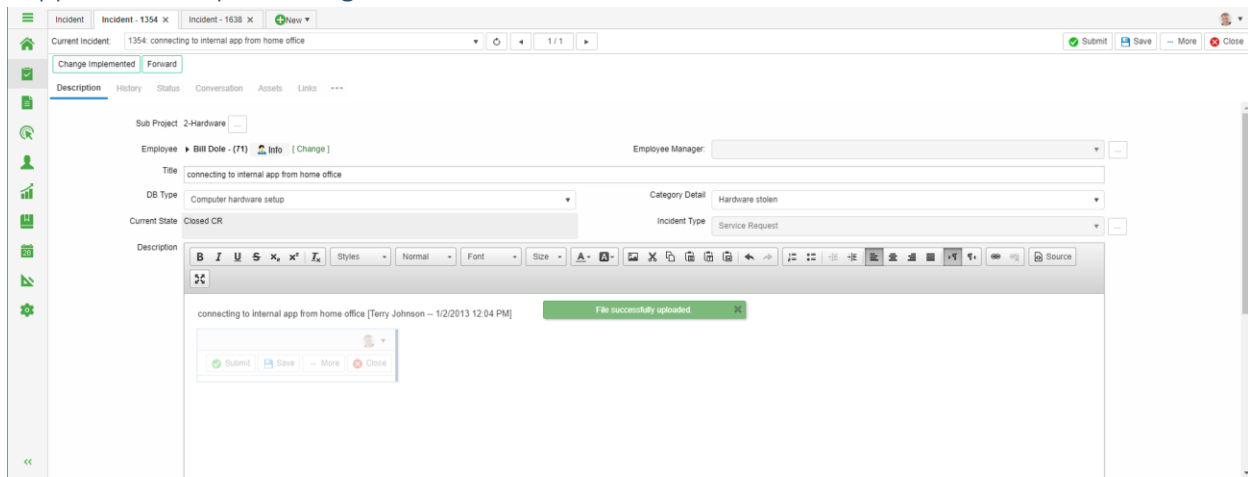
Auto-selected when right click on a sub-project, say bye to 'please select a sub-project first...'

No data found with explanation

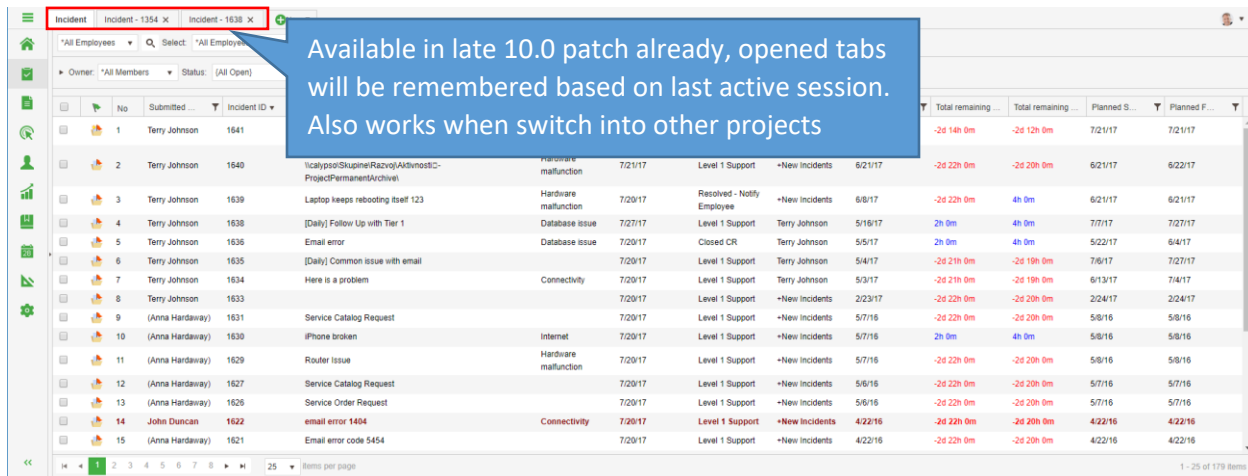
No items were found
Search Criteria:
Status: (All Open)
Incident Query: --Current Working Query
Column Filter: Last Modified Date after 2017-06-01
Sub Project: 1-Software

When no data is returned in the list, a friendly reminder of current applied conditions to help user adjust setting to get desired list results.

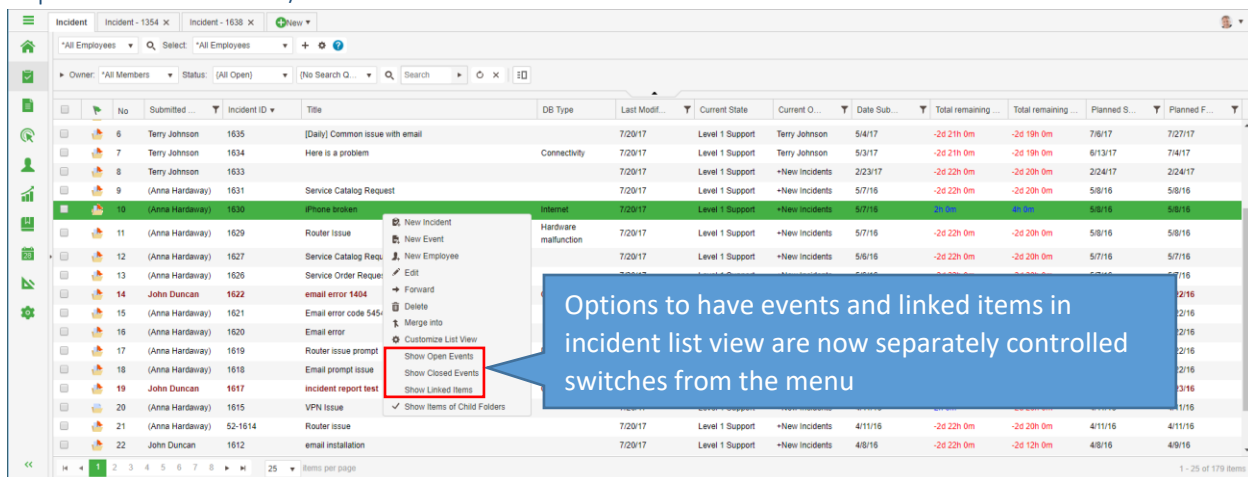
Support ctrl-c/v paste image in html editor



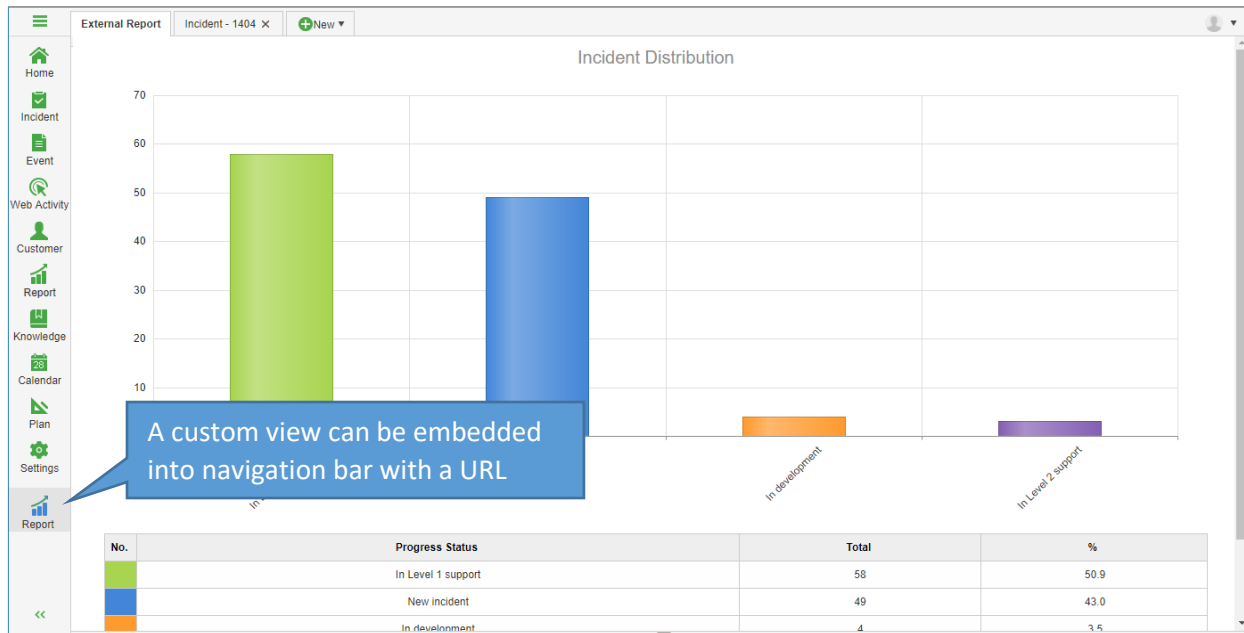
Remember last visited tabs



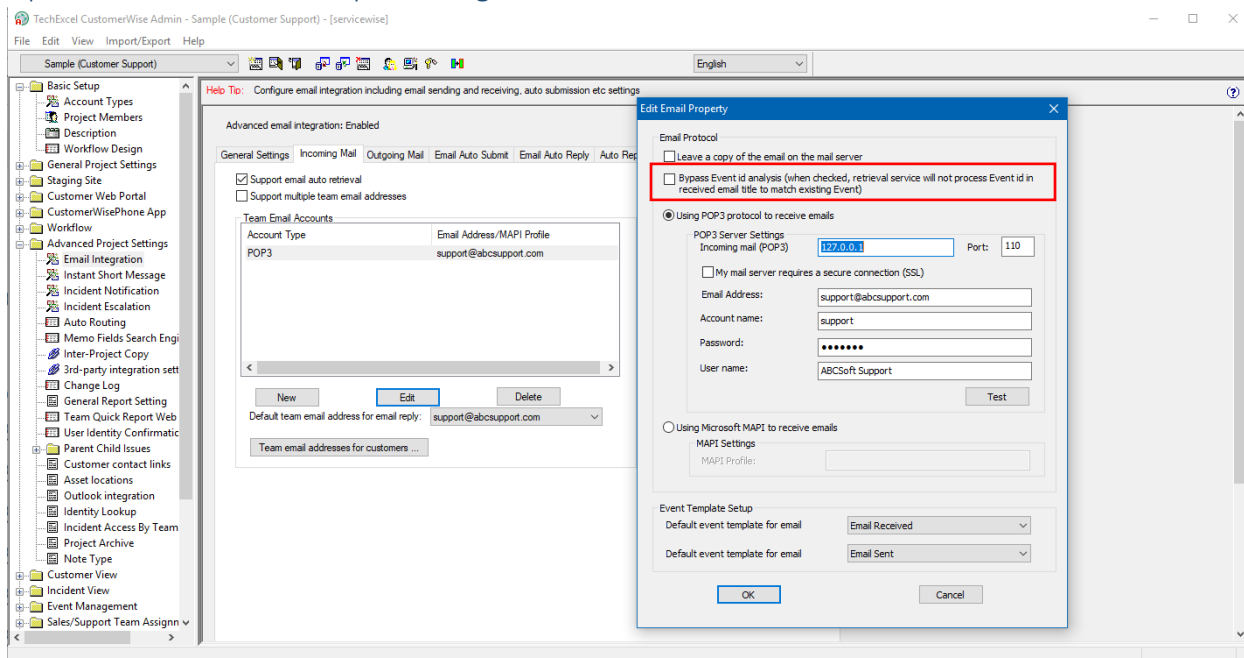
Separate show events/ linked incidents



Embeddable custom view (custom development required)

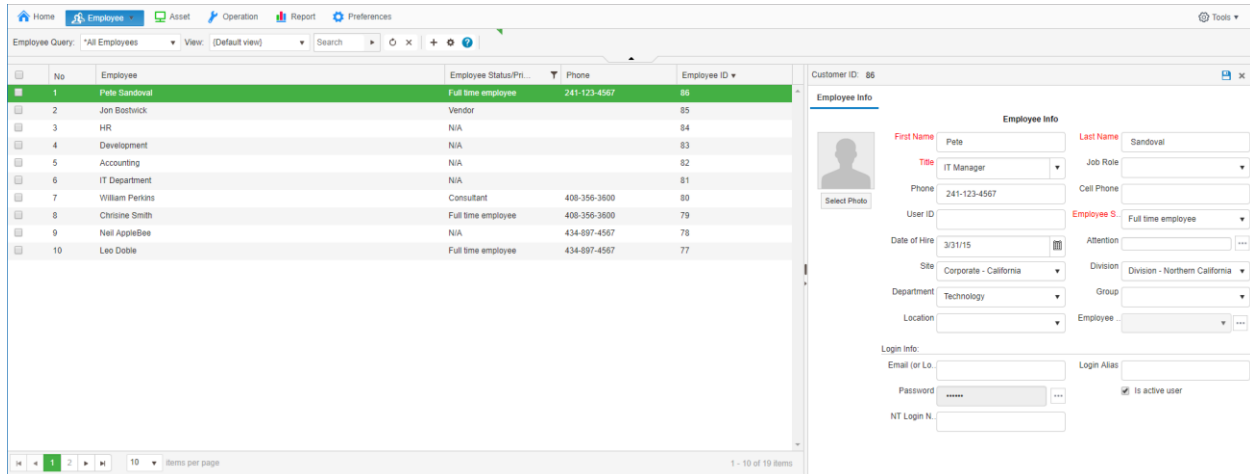


Option to turn off event id processing in email retrieval



AssetWise Web

Customer/Employee View available in AssetWise



The screenshot shows the AssetWise Web interface. On the left, there is a table of employees. On the right, there is a form for the selected employee, Pete Sandoval.

No	Employee	Employee Status/Pri...	Phone	Employee ID
1	Pete Sandoval	Full time employee	241-123-4567	85
2	Jon Bostwick	Vendor		85
3	HR	N/A		84
4	Development	N/A		83
5	Accounting	N/A		82
6	IT Department	N/A		81
7	William Perkins	Consultant	408-356-3600	80
8	Christine Smith	Full time employee	408-356-3600	79
9	Neil AppleBee	N/A	434-897-4567	78
10	Leo Doble	Full time employee	434-897-4567	77

The Employee info form for Pete Sandoval includes the following fields:

- First Name: Pete
- Last Name: Sandoval
- Title: IT Manager
- Job Role: [dropdown]
- Phone: 241-123-4567
- Cell Phone: [dropdown]
- User ID: [dropdown]
- Employee S: Full time employee
- Date of Hire: 3/31/15
- Attention: [dropdown]
- Site: Corporate - California
- Division: Division - Northern California
- Department: Technology
- Group: [dropdown]
- Location: [dropdown]
- Employee: [dropdown]
- Login Info:
 - Email (or Lo): [dropdown]
 - Login Alias: [dropdown]
 - Password: [password field]
 - NT Login N: [dropdown]
 - Is active user: [checkbox]

LinkPlus

Owner/status change merged into incident notification

Owner/status change made through LinkPlus API can trigger notification rule to send out emails.

V10.0 or later New email service required.

Attachment URL available in XML

Incident and knowledge attachments URL are available to retrieve from returned XML. Refer details API documentation.

Sample:



```

1 <Incident>
2   <IncidentID>1225</IncidentID>
3   <ContactID>91</ContactID>
4   ...
5   <Attachments>
6     <Attachment>
7       <FileID>816</FileID>
8       <Type>0</Type>
9       <EventID>1663</EventID>
10      <FileName>2016-11-23 15.52 Meet Now.mp4</FileName>
11      <FileUrl>http://localhost/scripts/texcel/customerwise/TxSwDownload/e2f302d81d0cfe9e2f302dce2f301ed/2016-11-23%2015.52%20Meet%20Now.mp4</FileUrl>
12    </Attachment>
13    <Attachment>
14      <FileID>817</FileID>
15      <Type>0</Type>
16      <EventID>1664</EventID>
17      <FileName>8523 - SLA History with Multiple Response Time ver Contract.docx</FileName>
18      <FileUrl>http://localhost/scripts/texcel/customerwise/TxSwDownload/e2f302d81d0cfe9e2f302dce2f301ed/8523%20-%20SLA%20History%20with%20Multiple%20Response%20Time_ver_Contract.docx
19    </Attachment>
20  </Attachments>
21 </Incident>
22

```

Newly added for Incident retrieval APIs

[illegible]

Newly added attachments section in returned XML of **GetKBItemInfo**

Query incident info with date range filter
Refer details API documentation.

- ConditionNames: PlannedStartDate, PlannedFinishDate
 - new PlannedStartDate, PlannedFinishDate
- ConditionChoices: 2017-03-10;2017-01-10
 - new datetime value
- ConditionRelation:0
 - 1: OR
 - other: AND

QueryIncidentsInfo

Test

To test the operation using the HTTP POST protocol, click the 'Invoke' button.

Parameter	Value
LinkedSystemID:	LPSYS
LinkedProjectID:	LPPRJ
status:	0
fieldNames:	
conditionNames:	
conditionOps:	
conditionChoices:	
conditionRelation:	
pageSize:	
currentPage:	

Invoke

Query incident info to support paging/sorting
Refer details API documentation.

add "sort" parameter

value	sort by incident id
asc	ascending
desc	descending

Click [here](#) for a complete list of operations.

Test

To test the operation using the HTTP POST protocol, click the 'Invoke' button.

Parameter	Value
LinkedSystemID:	
LinkedProjectID:	
status:	
fieldNames:	
conditionNames:	
conditionOps:	
conditionChoices:	
conditionRelation:	
pageSize:	
currentPage:	
sort:	

Invoke

New CTI UI

Employee ID: 70	Name: Anna Hardaway	<input type="text" value="Search"/>	<input type="button" value="+ Create new Employee"/>	<input type="button" value="Refresh info"/>	<input type="button" value="Save info"/>	<input type="button" value="Select a default project"/>	<input type="button" value="Print info"/>
Phone: 4348979900							

Call Event Info	All Incidents	Assets
------------------------	---------------	--------

Event Info: Employee called
✖

Name: Employee called

Description: Record the event that an employee initiated a call

State: Called and open ▼

Start date:

Access: Currently No Access ▼

Parent Incident: *General Event ▼ +

Owner: Paul Wagner ▼

Due Date:

☐ If closed

Employee Info: Anna Hardaway
✖

Address: 3400 1st Street

City: San Jose

Zip: 94506

Phone: 434-897-9900

Promotion:

Employee Status/Privilege: Executive managers

State: CA

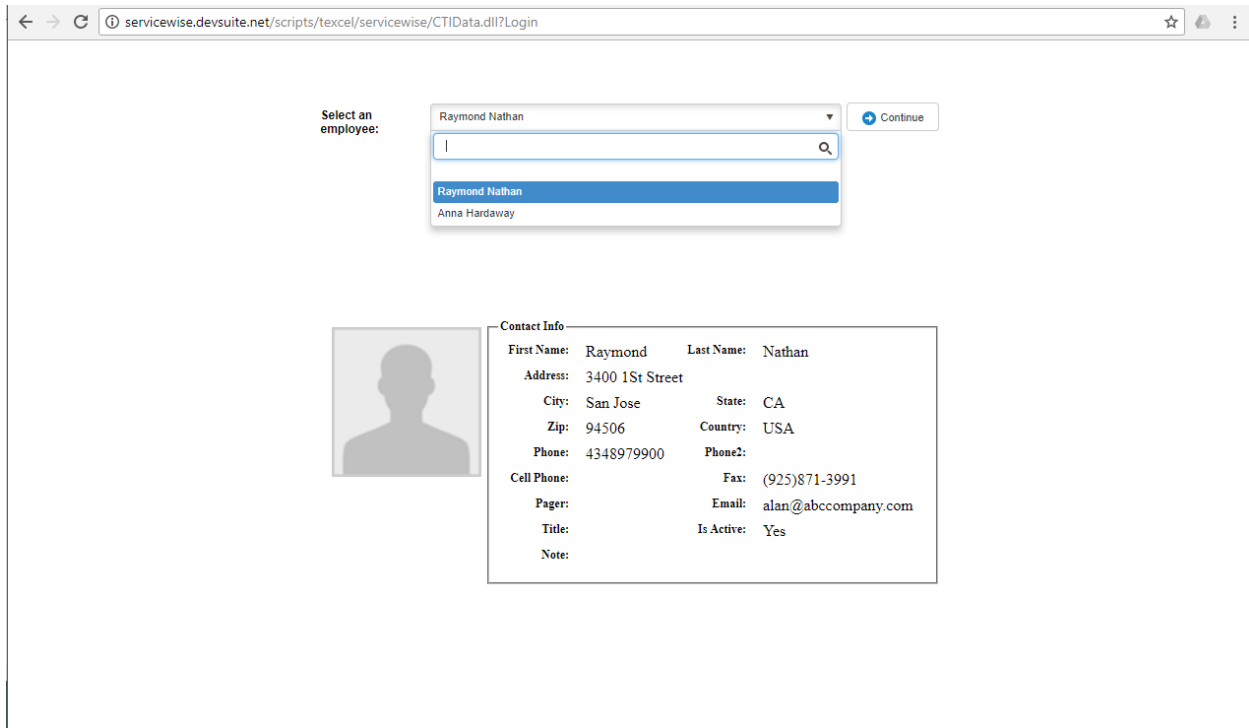
Country: USA

Fax:

Job Role: Director

Date of Hire: 11/10/13

Matching multiple user in CTI when numbers are shared among users



Reference and changes

Report view can be closed upon click on 'Submit'

Duplicate Memo fields 42, 43, 43 in sample solution template have been removed

Forward page submit/cancel button have been removed

Inter project copy button are moved to the top

Setup location now can be configured in a pop up

Account profile setting on team web has been merged into Tools menu

New email service will have a dedicated delivering service

Security has been improved on various areas related to cross site scripting

Oracle data connector is available for Admin by configuration

Digitally signed email attachments is supported by mail service