Richdesk Version 15 New Features

JUNE 2020

Summary of Main New Features

- Richremote Integration – connect anytime to remote computers
- SAML Single Sign On – sign on to hosted systems with Windows authentication
- Customer Portal Cloning – duplicate portals for multi-customer personalisation
- Rich Text Control – easily add formatted text and images to portal pages
- Summary and Detail Control – copy customer responses to specific ticket fields
- Customer Portal Dashboards – graphical view of status on the portal
- Dashboard Filter Criteria – more control over dashboard chart metrics
- Chart Auto-Refresh – ensure your metrics are always up to date
- Additional Controls for Automated Incident Updates – time saving automation
- New Settings for Automatic Incident Re-assignment – ensures group visibility
- New Navigator Refresh – efficiencies when working with huge data sets
- Brute-Force Attack Prevention – securing richdesk access points
- Escalation Service – control over SLA alerts and escalations
- Email Service – increased email processing, visibility and control
- Active Directory Service – fully comprehensive integration with richdesk
- Extensions Manager – dashboard with centralised control over services

Read on to learn how richdesk v15 effortlessly improves the delivery of customer service...

Richremote Anytime Connect Integration

Richremote Anytime Connect is now integrated with richdesk enabling access to and management of remote computers and devices. Launched directly from richdesk, the Anytime Connect device directory shows available computers and allows a connection session to be seamlessly initiated from the asset via the richdesk Navigator or support ticket (incident).

SAML Single Sign On

A new Single Sign On (SSO) method has been added based on Security Assertion Markup Language (SAML). This allows hosted instances of richdesk to use Windows authentication for customers to sign onto the system.

Customer Portal Cloning

A new 'Clone' option has been added to the CSP Group settings area where portal homepages are configured. This allows portal groups and their portal homepage design, look and feel to be copied (duplicated). Designed primarily for providers of external customer service such as MSPs, the new clone feature makes it quick and easy to provide personalised portals to different customers.

Rich Text Control

A new text editor control has been added to the Customer Portal Workflow engine that allows portal builders to control the look and feel of text through a WYSIWYG interface. The editor allows pictures to be simply pasted onto a page without the need to use the HTML control.

Summary and Detail Control

Two new controls, Summary and Detail, have been added to the workflow designer that allows customer inputs to be captured and "copied" to the Summary and Detail field of the Incident record. For example, a customer is prompted to describe an issue and their description is automatically copied to the detail area of the incident. Previously the Summary or Details were only pre-definable using an Incident Variable or Incident Submit click-action.

Customer Portal Dashboards

A new Dashboard builder (introduced to the Specialist client in version 14) has been added to the customer portal configuration to enable the creation of customer facing dashboards.

Dashboard Filter Criteria

A new report filter has been added to the Dashboard manager for 'Logged By', which allows specialists to create a dashboard based on how the incident was logged (method), including Specialist, Email and Web.

Chart Auto-Refresh

A new option has been added to the Dashboard Manager that allows the refresh rate for individual charts to be set.

Additional controls for Automated Incident Updates

Additional rules have been added for the Incident update settings so that it is possible to configure Action types for up to five different Incident statuses. This means that when an incident is updated, it's status can be changed (or not) based on its current status.

This is particularly useful when implementing a 'two stage' closure process. For example, once the incident is resolved, if the user updates it via email or Portal, an action such as 'Resolved Update' can be added that automatically set the incident status to re-opened. Whereas if the user updates a closed Incident, a different action type can be applied that keeps the status as closed.

New Settings for Automatic Incident Re-assignment

The automatic Incident assignment feature, which is typically used to ensure that unassigned incidents are automatically assigned to specialists when they open them, now assigns the incident to the Specialist's Group if this different from the Group selected when logged by email or the Portal. These settings are within the Business Rules Automation area of the Setup Console.

New Navigator Refresh

A new setting has been added to the user profile called 'Refresh Navigator after saving item record' with this unticked, saving a record item will prevent the Navigator from performing a refresh. This is to prevent delays to the system when updating an item under a single parent that has many thousands of items within the folder.

Brute-Force Attack Prevention

New 'Brute Force' controls have been added to the Specialist Web Client allowing administrators to control login attempts before an account is automatically locked out. This includes the:

- Number of attempts with incorrect password allowed until login is paused
- Duration in minutes of the account lock pause period
- Number of attempts before the specialist account is permanently locked and can only be unlocked by an administrator

Escalation Service

A new Escalation Service has been implemented using updated web-based controls to control the service and view notifications.

Email Service

A new Email Service has been implemented with advanced functionality to improve performance and email management:

- After email have been successfully processed, they are now moved to a "ProcessedByRichmond" folder. Where emails are ignored, for example out of office replies, they are moved to an IgnoredByRichmond folder. This increases the speed of email processing and reduces the chance of the service stopping due to conflicts checking the status of previously processed emails, or accidentally processing the same email twice.

- A new setting allows control over the number of emails retained in the "ProcessedByRichmond" folder. For organisations that are required to retain original emails, this is now easily achieved without impacting system performance.

- Inbound emails are now retained in their original format as attachments, making it easy to view the original email and any in-line images or links. There is a setting that allows users to choose whether emails are retained using this method.

Active Directory Service

A new Active Directory Observer (ADO) application has been implemented with new controls for data transformation, synchronisation and multi-database mapping. Replacing the previous windows-based AD sync tool, the new ADO application is a web app that opens in the browser. The ADO app:

- Makes it easy to add new fields to map data from AD, ideal for organisations that use custom AD fields.

- Enables richdesk Configuration Item (CI) fields to be created based on a combination of LDAP fields and text strings. For example, a Customer Portal web ID can be automatically created based on "domain\" + "samaccountname", or a user name field can be created by concatenating "givenname" + ' ' + "sn".

- Allows friendly names to be created and displayed as aliases to domain names, for example, when organisations merge and retain separate domain names, this feature allows a common name to be used and displayed to support technicians.

- Provides control over AD moves, additions, deletions and changes, for example, the ability to replicate AD moves, add new OU records, move records deleted from AD to a nominated richdesk folder and update individual CIs with AD OU record data changes.

- Supports multiple richdesk instance population from a single AD source, for example, where an organisation has multiple help desks for different divisions or different support teams such as IT and HR, the AD extract file can map to, populate and synchronise multiple richdesk databases.

Extensions Manager

A new Extensions Manager has been added to the Specialist client. This provides a dashboard overview of services enabling centralised control and visibility of the:

- Escalation Service that manages notifications for SLA response and resolution warnings and breaches, and SLA escalation alerts.
- Email Service for incoming and outgoing email processing
- Processing services that manage notifications for activities (future tasks), maintenance (renewal and pending renewals), tracking (e.g. loaned item reminders) and service status change alerts when services become impaired or unavailable.

The Extensions Manager requires access rights to be enabled via the Setup Console in Rights → System → 'Extensions Manager Rights'.