



Service Requests Import Utility

Importing Service Requests via CSV Files

NOTICES

ServicePRO Service Requests Import Utility

Edition – April 2015

HelpSTAR® and ServicePRO® are registered trademarks of Help Desk Technology International Corporation.

This publication may not be reproduced, stored in a retrieval system, or transmitted in any form without the written permission of Help Desk Technology Corporation.

Trademarks

ServicePRO, HelpSTAR, Help Desk Technology, and the Help Desk Technology logo are registered trademarks of Help Desk Technology Corporation. Unless otherwise provided in this document, marks identified by “®,” “™” and “SM” are registered marks, trademarks, and service marks respectively of Help Desk Technology. All other trademarks are the property of their respective owners.

Microsoft®, Microsoft® Office®, Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Adobe Reader® is either registered trademarks or trademarks of Adobe Corporation in the United States and/or other countries.

Help Desk Technology Support

- ❓ For additional support information, visit us at: <http://www.servicepro.solutions>
- Call us at: 1-800-563-4357, Option 3 for Technical Support

Table of Contents

Service Requests Import Utility (Open Source)	3
<i>Overview</i>	3
<i>What is the Service Requests Import Utility?</i>	3
<i>Prerequisites, Scope and Limitations</i>	3
<i>Fields Mappings for CSV file Data</i>	4
<i>How to access the ServicePRO Import Utility</i>	5
Technical Pre-requisites	5
Configuring, Building and Running the Utility	5
<i>User Interface Overview</i>	6

Service Requests Import Utility (Open Source)

Overview

This document describes how to use the Service Requests Import Utility. Importing requests can be performed by importing data from CSV files.

What is the Service Requests Import Utility?

The Service Requests Import Utility is an open source utility developed using the ServicePRO SDK to import Service Requests and memos into the ServicePRO database from a comma-separated values (CSV) file.

Data for tickets can be exported from other Help Desk systems into CSV file. And then added into ServicePRO Database in bulk using this import utility thus facilitating quicker and easier import of data for service requests without needing to create the tickets one by one manually from the ServicePRO application.

Prerequisites, Scope and Limitations

1. The input data for Service Requests Import has to come in a CSV (comma-separated values) file.
 - Only the very first row should contain Column/Field Names.
 - All other rows should contain the data values for the fields.
 - One CSV File for Service Requests and One CSV File for Memos, linked using a Logical Request ID, supplied by both CSV files.
2. The following basic properties of Request are required fields for creating Service Requests and they should be coming in the CSV file:
 - Request Title
 - Requester Name
 - Priority
3. The following information coming in the CSV file should be already present in the ServicePRO for the import to happen for the specific record:
 - Requester name
4. It is possible to have multiple memos imported per ticket.
5. The User need to provide a folder id in which all the requests will be imported to.
6. The User needs to select the request type (UDF or Generic) and map it appropriately.
7. It is not possible to import the following Base Service Request fields:
 - **TimeStateChanged** – This field is updated automatically whenever the request data is inserted or updated
 - **Status** – Status in ServicePRO may not match with the Status coming from another application

8. It is not possible to import the following Custom Fields:

- Reference Fields
- DB Lookup Fields (LookupBox)
- Function Fields
- Masked Entry

[Only the following Custom Fields Data can be imported – Text, HyperLink , Numeric, Date, CheckBox, DropDown, RadioButton - And no validation will be applied – The user should make sure that the correct/valid data is coming in for the fields in the CSV file.]

9. Requester name and Memo author name are mapped to tbluser.name

10. The following keys need to be updated with the correct values in the configuration file as a prerequisite:

- ❏ ServiceURL (i.e. <http://localhost/HelpSTAR.Server/>) - This needs to be updated to the Client's ServicePRO WCF Service URL
- Username and Userpassword - These needs to be updated to a ServicePRO User with Administrative credentials in the client's ServicePRO Database

Fields Mappings for CSV file Data

CSV files require specific fields to be available in order for them to be properly mapped during the import process. Mapped fields are as follows:

- **Required fields mapping:** RequestID [Logical Request ID for Mapping to Memos in Memo CSV File], Title, Requester, Priority code
- **TimeLogged:** this is an optional date-time field. If the user does not map it, then it will use current date time to log a ticket. Otherwise it will use the mapped field.
- **UDF fields mapping:** Only basic fields (ie. numeric, text, datetime) without validation

NOTE: The Request ID that comes with the CSV file is for logical mapping during memo import. The actual Request ID will always be generated by the utility.

The Memo CSV file is optional – If you do not import memos, then the imported request will have only one default memo.

The Memo CSV file features the following fields, required for mapping:

- RequestID (A logical Request ID for mapping memos to Requests in the Requests .CSV)
- Author
- Type
- Memotime
- Text Memo

For the Service Requests imported using the Service Requests Import Utility, the Category will be set to [none] by default. As a result, when a user tries to save these imported requests in ServicePRO, the user will be prompted to select a Category for them.

How to access the ServicePRO Import Utility

The Service Request Import Utility is supplied as an open source code Visual Studio project, as part of the ServicePRO SDK.

Technical Pre-requisites

Technical Prerequisites to build and run the Open source Service Requests Import utility are as follows:

- ServicePRO 14.0.72.6 version or Later
- ServicePRO SDK 14.0.72.6 version or Later
- Microsoft Visual Studio 2013
- .NET framework 4.5+

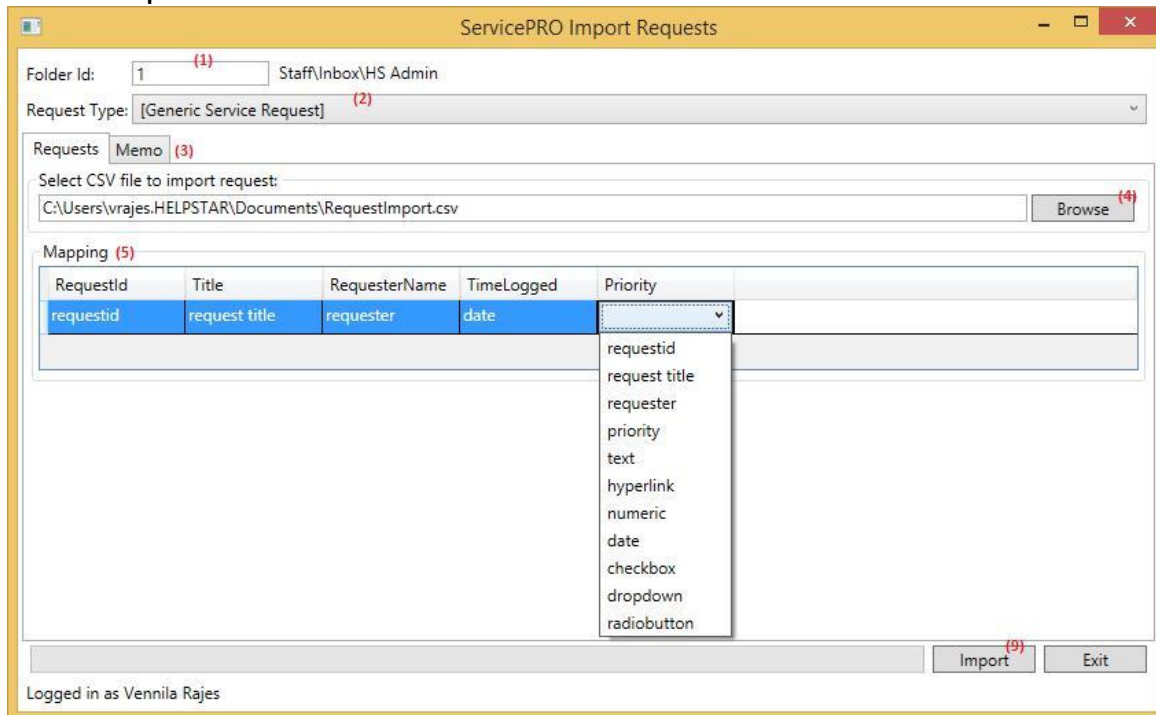
Configuring, Building and Running the Utility

1. Extract the provided ZIP file containing the ServicePRO SDK into a local directory.
2. Using Visual Studio 2013, browse to the extracted files location and open the project file ImportRequests.csproj.
3. Correct and/or add the references in the project for the following ServicePRO SDK related DLL files:
 - HelpSTAR.PCL.Common.dll
 - HelpSTAR.PCL.ObjectDesigner.dll
 - HelpSTAR.Transport.Hybrid.dll
 - ICSharpCode.SharpZipLib.dll
 - ServicePRO.Sdk.Windows.dll
4. In the App.Config file (in the case of the Compiled Utility – ImportRequests.exe.config file), the values for the following keys need to be updated with appropriate values:
 - **ServiceURL Key** – Update with your ServicePRO service url. This URL can be found in the appsettings.json of your ServicePRO installation as the "api" value, typically found under:
C:\HelpSTAR\HSSITES\HSSupportNET\web\assets\globalconfigs
 - **Username & Userpassword keys** – Update with the user login name and password for an Administrative user in ServicePRO. The utility will use these credentials to login as that user:

```
<add key="serviceURL" value="http://localhost/HelpSTAR.Server/" />
<add key="Username" value="adminUser" />
<add key="Userpassword" value="helpstar" />
```
5. After correct url and login information has been provided, build and run the utility.

User Interface Overview

With the Requests Tab selected:

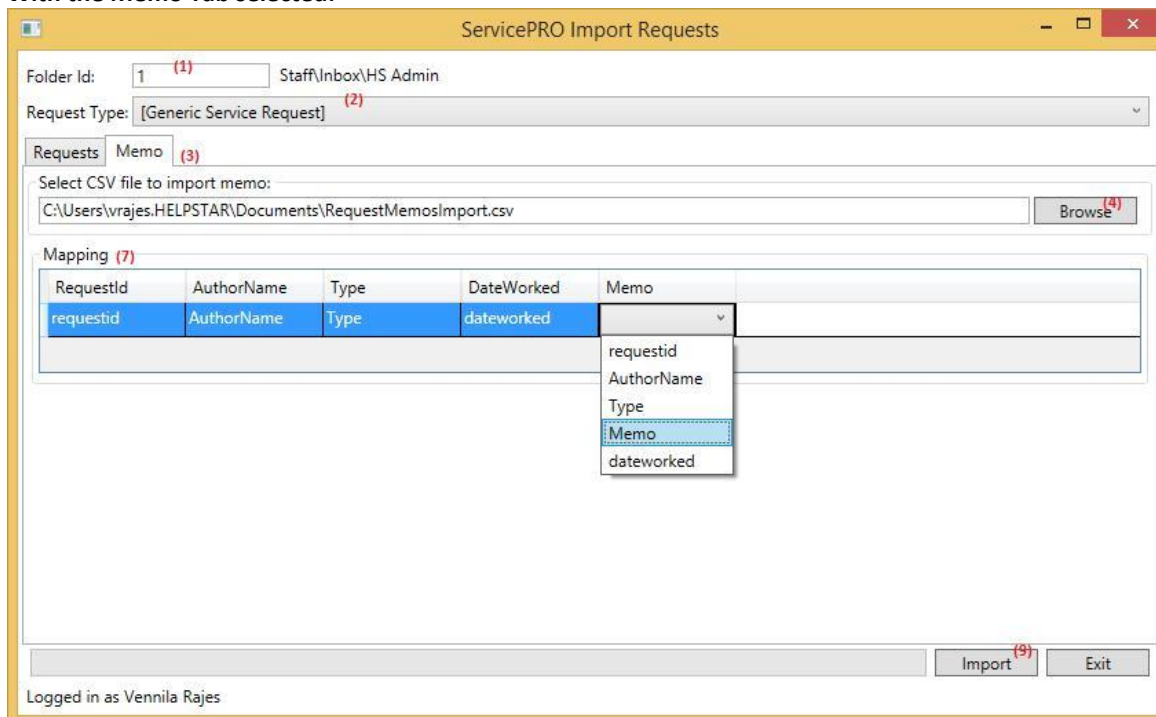


The screenshot shows the 'ServicePRO Import Requests' window. The 'Requests' tab is selected. The 'Folder Id' is set to '1' and the 'Request Type' is '[Generic Service Request]'. The 'Select CSV file to import request:' field shows the path 'C:\Users\vrages.HELPSTAR\Documents\RequestImport.csv'. The 'Mapping' table is as follows:

RequestId	Title	RequesterName	TimeLogged	Priority
requestid	request title	requester	date	requestid

The 'Priority' dropdown menu is open, showing options: requestid, request title, requester, priority, text, hyperlink, numeric, date, checkbox, dropdown, radiobutton. The 'Import' button is labeled with a red (9). The status bar shows 'Logged in as Vennila Rajes'.

With the Memo Tab selected:



The screenshot shows the 'ServicePRO Import Requests' window with the 'Memo' tab selected. The 'Folder Id' is set to '1' and the 'Request Type' is '[Generic Service Request]'. The 'Select CSV file to import memo:' field shows the path 'C:\Users\vrages.HELPSTAR\Documents\RequestMemosImport.csv'. The 'Mapping' table is as follows:

RequestId	AuthorName	Type	DateWorked	Memo
requestid	AuthorName	Type	dateworked	requestid

The 'Memo' dropdown menu is open, showing options: requestid, AuthorName, Type, Memo, dateworked. The 'Import' button is labeled with a red (9). The status bar shows 'Logged in as Vennila Rajes'.

The following are the main parts of the open source Service Requests Import utility User Interface (Please reference the above images):

1. **Folder Id input** – This is the ID of the Queue folder to where the request will be moved to after creation. To find the id run the following sql statement on your ServicePRO HS2000CS database:

```
select * from tblqueue where QueueType in (2,8)
```
2. **Service request type selection** – This will depend on your ServicePRO database. Selecting a custom request type will also allow you to map values to custom fields on the request.
3. **Requests and Memo CSV import selection** – You may import request data only OR request PLUS memo data, although memo data is not mandatory. If a Memo CSV is not selected, a default memo will be entered for newly created requests.
4. **Browse** – Browse and select a comma separated values (CSV) file that contains the data to import here. Please note that the data file needs to include a header row containing Column/Field names to facilitate field mapping in Step 5 (Request field mapping) and Step 6 (Memo field mapping).
5. **Mapping (Requests)** – Once a valid CSV file is selected for Requests, the field headers in Mapping Grid should be mapped to the corresponding columns in the CSV file.
6. (Details on field mapping are provided in the Section '**Fields Mappings for CSV file Data**'))
7. **Mapping (Memo)** – [Not Mandatory] Once a valid CSV file is selected for Memos, the field headers in Mapping Grid should be mapped to the corresponding columns in the CSV file.
8. (Details on field mapping are provided in the Section '**Fields Mappings for CSV file Data**'))
9. **Import** – Import the data and create new requests. If you have not specified a memo CSV, the utility will prompt if you want to import with the default memo. Click Yes to continue.

After the import is completed, a success prompt will be displayed.

