iSupport®
User's Guide

December 2010

iSupport® User's Guide

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- Spell-check functionality from Keyoti Inc (www.keyoti.com)
- HTML parsing functionality from HTML Agility Pack by Simon Mourier (simonm@microsoft.com)
- Text Editor toolbar functionality from Telerik (www.telerik.com)
- Charting functionality from Visifire (www.visifire.com)

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1 Introduction

iSupport® helps you perform help desk functions such as setting up customers, companies, assets, knowledge entries, and pulling the information into incidents, purchase requests, problems, and changes (if enabled). You can also generate reports on iSupport data. Administrators can enable and configure all of the features in the application.

iSupport Documentation

This guide contains information on entering and viewing customer profiles, incidents, problems and changes (if enabled), assets, purchase requests, knowledge entries, and frequently asked questions in the iSupport application. The *iSupport Administrator's Guide* provides information on enabling and setting up all iSupport functionality, and the *iSupport Installation Guide* contains information on how to install the product. Access the *iSupport Administrator's Guide* via the Desktop Help menu.

Documentation guides are published in PDF format and are available via the Help menu on the Desktop. Use Adobe Acrobat® Reader™ to view PDFs; to download a free copy of Adobe Acrobat® Reader™, go to www.adobe.com.

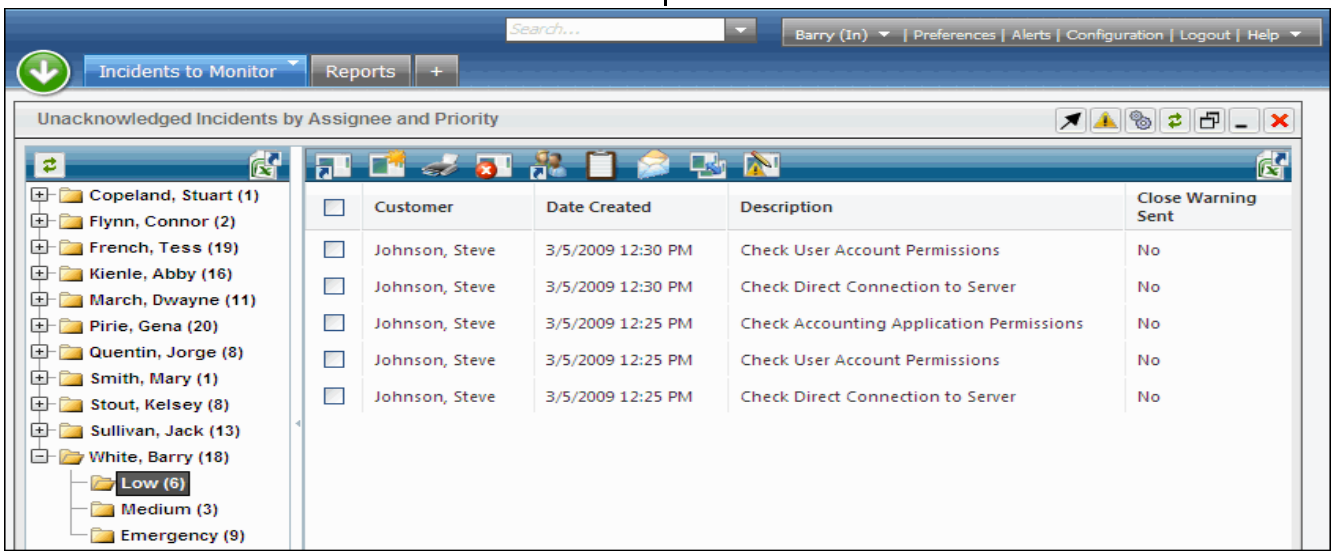
A cross-browser online help system is included in iSupport. It is installed in the Help\CSH directory under the directory in which the Desktop is installed (\cSupport\RepClient by default). The help system includes overviews and context-sensitive help topics. You can click the Online Help option on the Desktop Help menu to display the help system framework.

You can click the Help icon in iSupport screens to display a comprehensive help topic with information on the functionality in that screen.

iSupport Interfaces

iSupport has three interfaces: the Desktop for administrators and support representatives, the End User Desktop for customers, and the Mobile Desktop for support representatives.

Desktop



End User Desktop

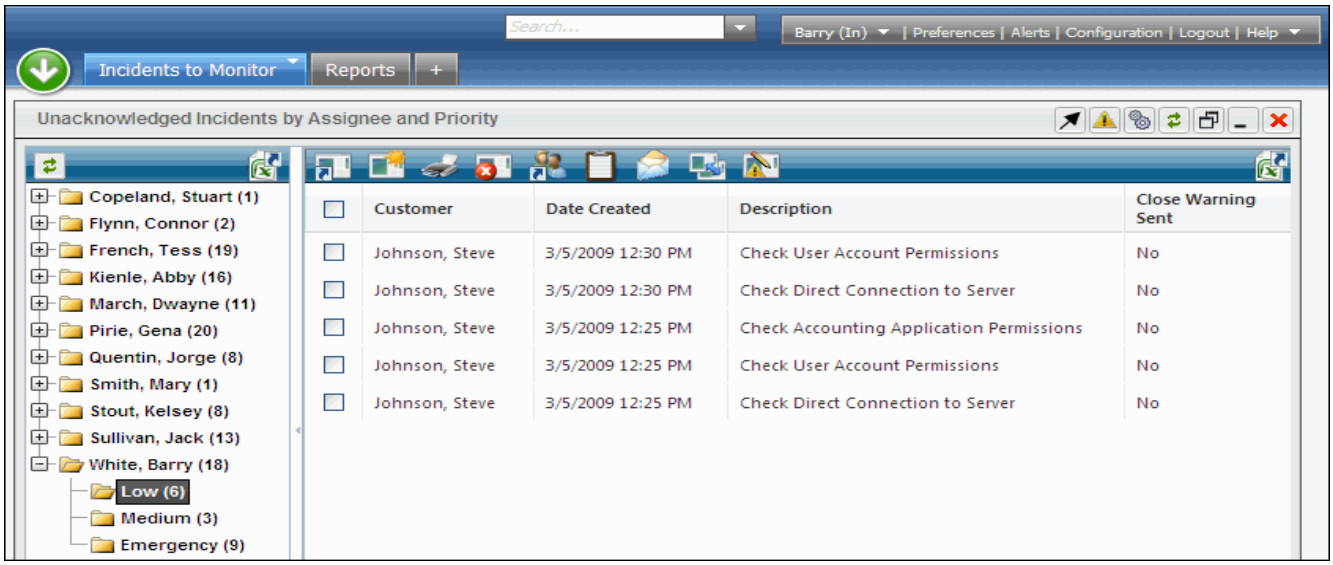
Mobile Desktop

- To access all iSupport functionality on the Desktop, use Microsoft® Internet Explorer® 7 or 8, Mozilla® Firefox® 3.5, Google™ Chrome 3.0, or Apple® Safari® 4.0. The URL is: http://*<server>/<virtual directory in which Desktop is installed>/*
- Use any current version HTML-compatible browser to access the End User Desktop. URL: http://*<server>/<virtual directory in which iSupport End User Desktop is installed>/*
- Use any current version HTML-compatible browser to access the Mobile Desktop. Note that some functionality will be disabled if the JavaScript is disabled or the browser does not support JavaScript. URL:
  http://*<server>/<virtual directory in which iSupport Mobile Desktop is installed>/*
  See "Mobile Desktop" on page 49 for more information.

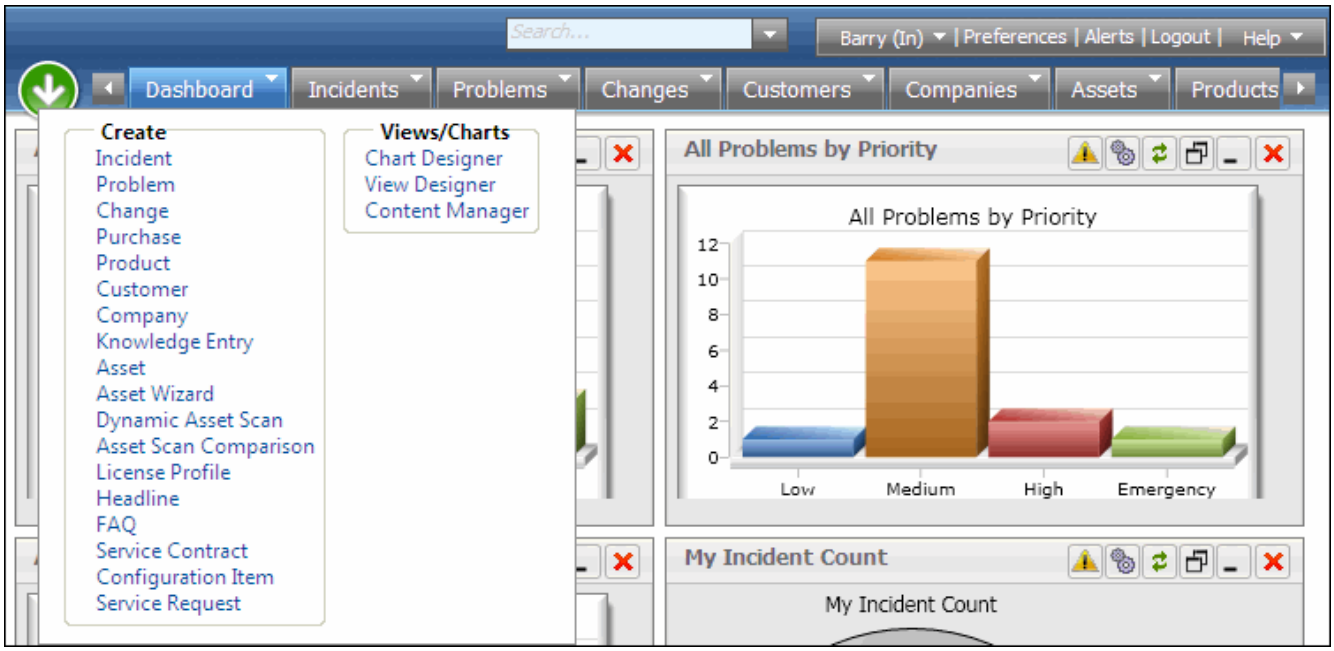
The Desktop

Use the Desktop to access all iSupport functionality. It contains customizable views and tabs, global search, alerts, and links for logging out and specifying availability for routing.

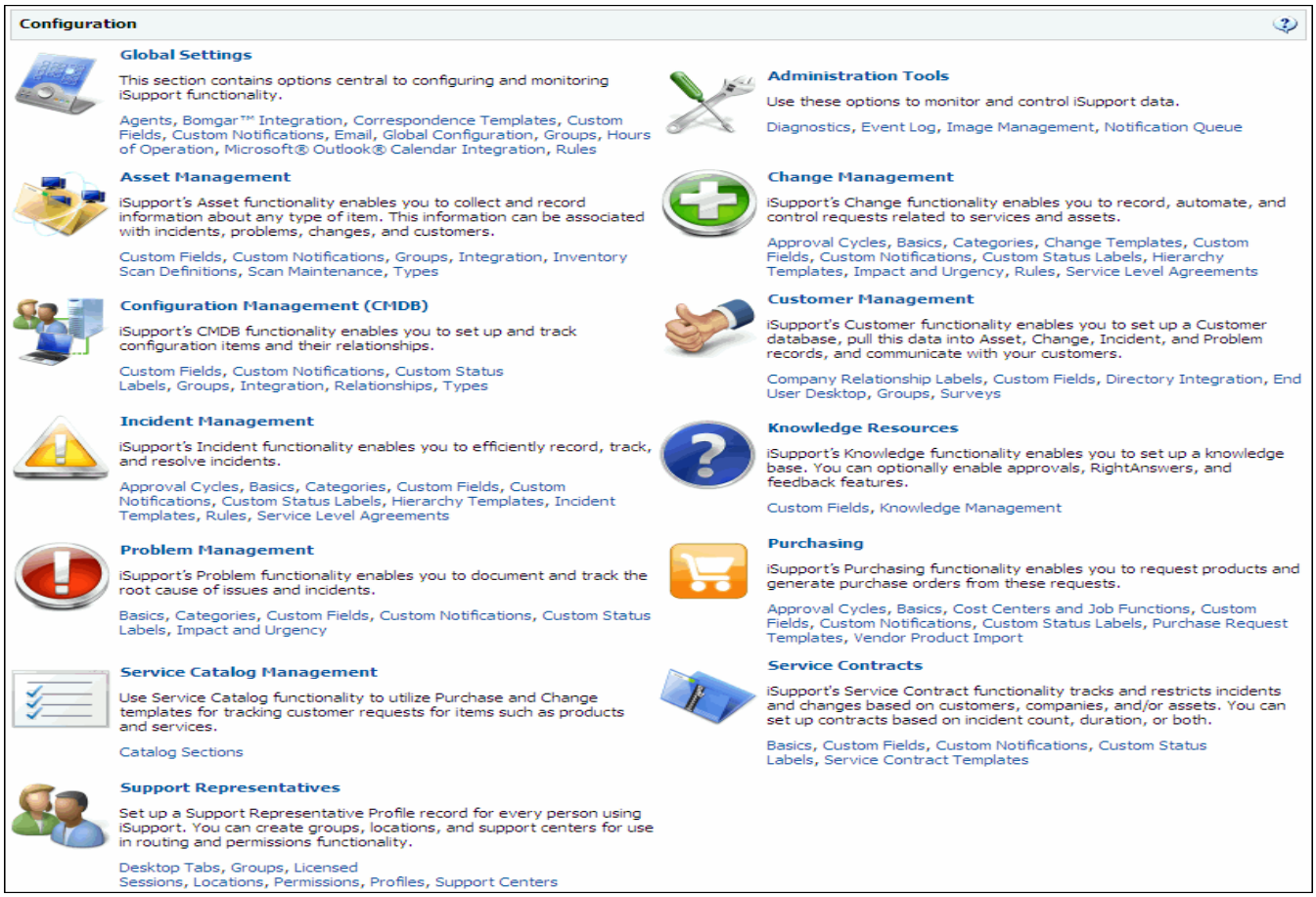
You can add headlines, URLs, RSS feeds, reports, weather, and views and reports of iSupport data to your Desktop tabs. You can also create a To Do list and search for knowledge entries. Selected view data can also be converted into formats such as Microsoft Excel.



Use the action menu to access iSupport entry screens and other features.



If you are set up as administrator in your Support Representative record, the Configuration option appears in the function bar on the upper right corner of the Desktop for configuring all iSupport functionality. You can set an option in Preferences to retain the Configuration tab on your Desktop. These options enable administrators to configure all iSupport functionality and view configured options and data.

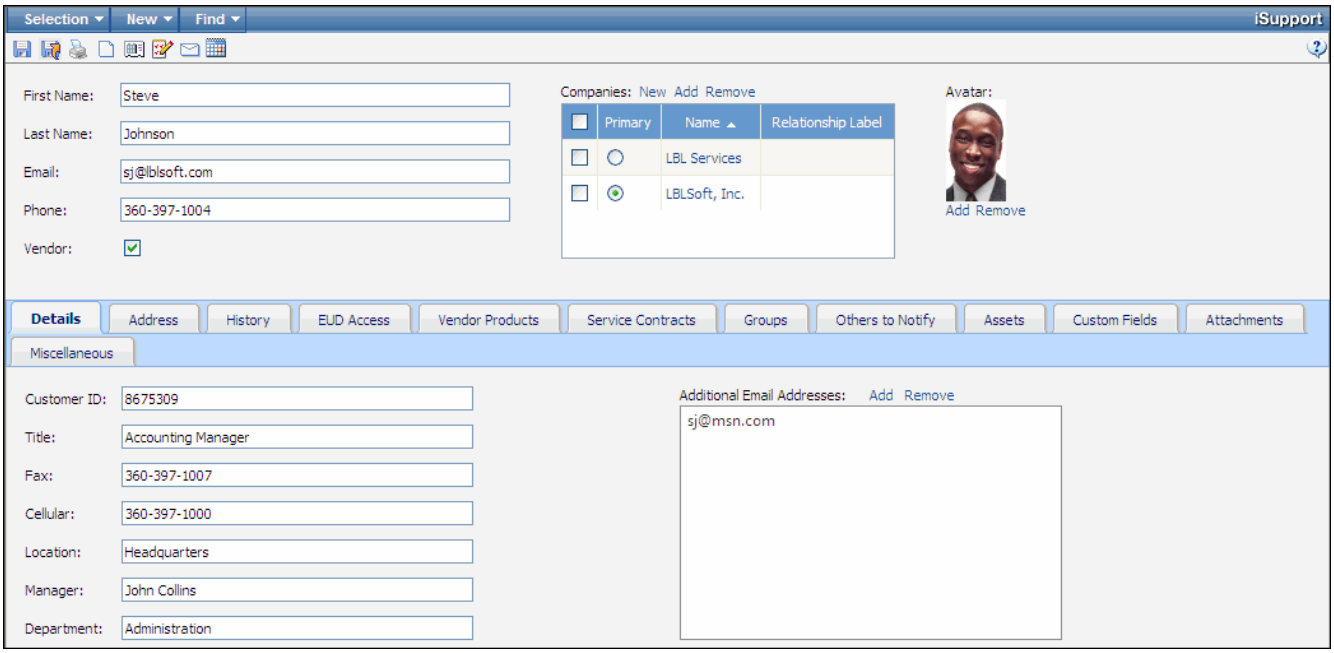


For more information on the Desktop, see "Using the Desktop" on page 65.

Options Available on the Desktop

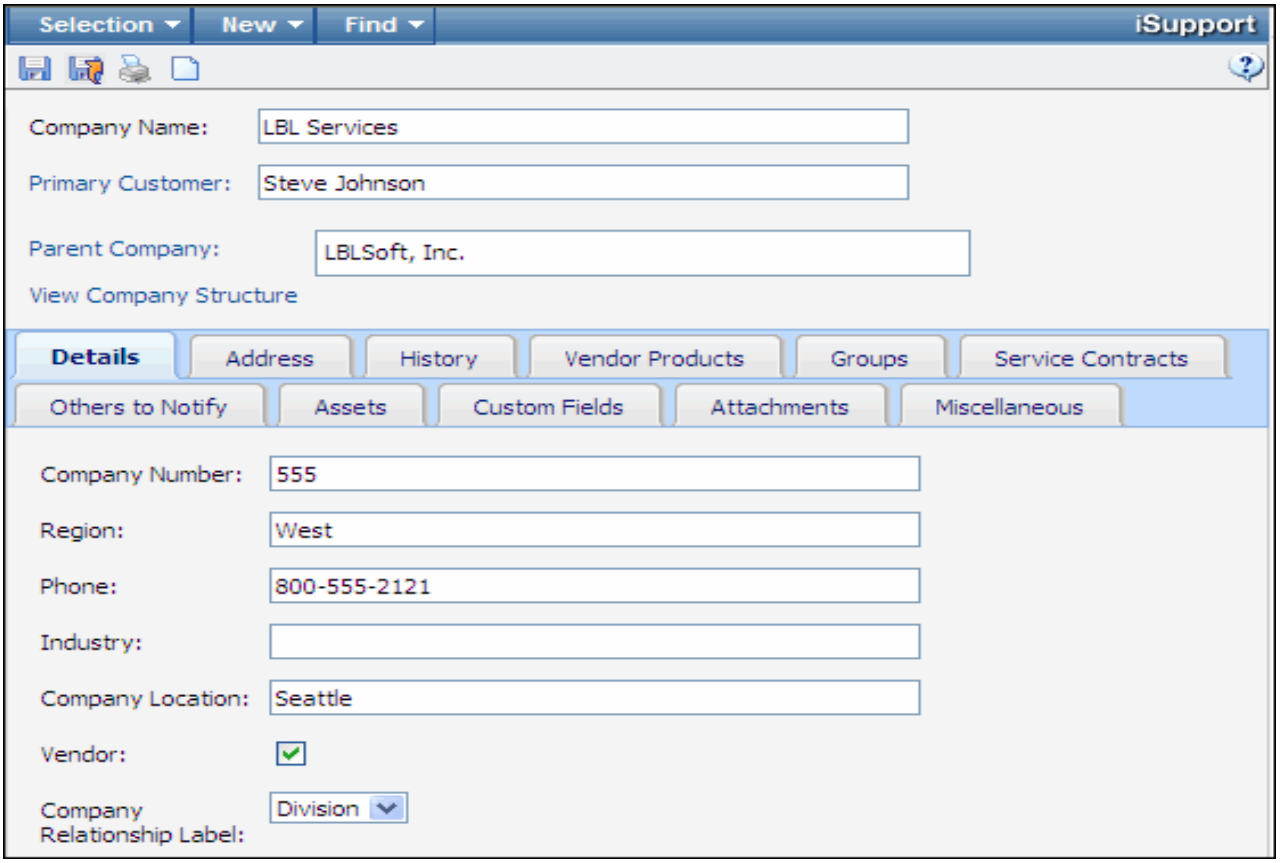
Tracking Customers

Use the Customer Profile screen to store contact, login, and company information for customers. You can associate a custom service level agreement if applicable, enter comments for display when the customer is selected in the Incident screen, generate a survey, define End User Desktop access, and specify group membership and others to notify.



Tracking Companies

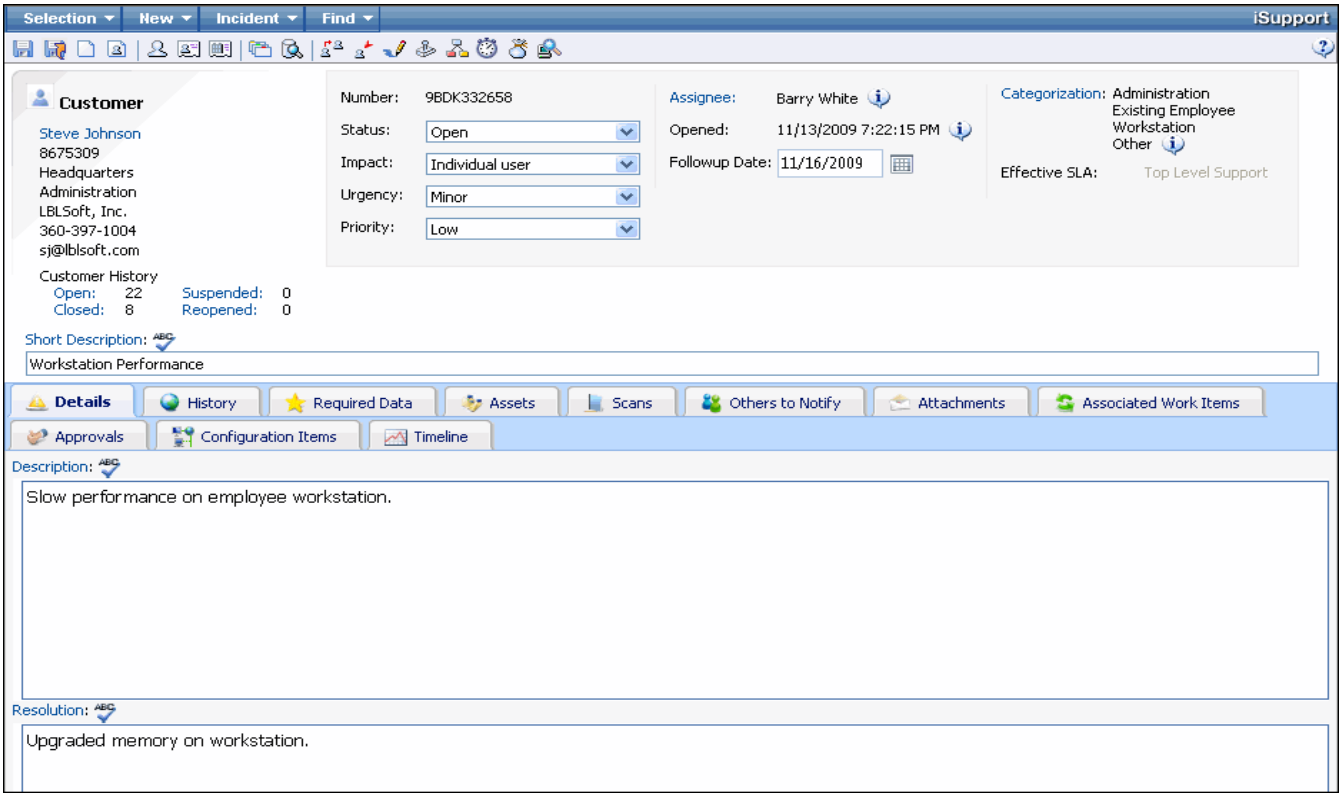
Use the Company screen to record the following for a company: primary customer, identification and address information, custom fields, associated groups, others to notify, and miscellaneous information such as comments to display when a customer of the company is selected.



Creating Incidents

Incidents can be created by:

- Customers completing incident fields on the End User Desktop
- Support representatives completing fields in the Incident screen from the Desktop and Mobile Desktop (if enabled)
- Customers submitting email



In the Incident screen, you can:

- Enter new **customers** or select existing customers. Search for existing customers by name, phone, email, location, department, company, or customer ID. Add additional customers to an incident. (Additional customers cannot view the incident on the End User Desktop and will not receive notifications configured to be sent via iSupport.)
- Use **incident templates** for common call types or reoccurring issues. Templates automatically complete fields with defaults for an incident's category set, issue description/resolution, assignee, status, and/or priority. An auto-close option can be set to populate fields and automatically close the incident after the template is selected. Administrators can create **incident hierarchy templates** for related tasks or requests.
- Follow **scripts** that can be displayed when the associated category combination is selected.
- **Schedule** one or more tickets to be created with an open status at a future date/time.
- Classify incidents via **categories**.

- Use the following fields for documenting incident information:
  - The **Work History** field records what was done, when it was done, and who did it.
  - The **Customer Work History** field enables you to, if configured, control the information made available to the customer through the End User Desktop.
  - The **Audit History** field automatically logs incident events with the date, time, and support representative name, providing an uneditable record of incident history.
- Use **custom text, keyword, and date fields**.
- **View and open related asset records and other incidents** associated with an incident and **perform asset scans**.
- **Route** an incident to a new assignee using routing methods based on skill, location, name, or group. All methods can also include load balancing, which involves weights based on incident priority. If you enable more than one routing method, you can choose the method when the incident route is initiated.
- **Create related incidents**. A related incident contains all of the same fields as a regular incident, but you can close all related incidents automatically when you close the original incident. All existing incident functionality (such as custom fields, routing, escalation, and followup dates) applies to related incidents.
- **Associate new and existing problems.** Use Problem functionality (if enabled) to document and track the root cause of incidents. You can configure associated incidents to be closed when a Problem record is closed.
- **Associate new and existing changes.** Use Change functionality (if enabled) to record and track requests seeking alterations related to services and assets.
- **Associate new and existing purchase requests.** Use Purchasing functionality (if enabled) to request and track products and services.
- **Associate configuration items.** Use Configuration Management Database (CMDB) functionality to track the assets, services, and other resources that are crucial to your organization's operation and the relationships between these components.
- For incidents that are not resolved within defined thresholds, incidents can **escalate** and be reprioritized. Custom service level agreement settings can be associated with categories, customers, and templates.
- Search for **knowledge** entries based on incident categorization. The issue resolution can be pasted into an open incident with one click. iSupport integrates with RightAnswers, which contains subscription-based knowledge content for common PC hardware, software, and network issues.
- **Send and track correspondence** from the Incident screen. You can utilize correspondence templates set up during configuration.
- **Attach files** to an incident.
- Generate **surveys**.

Processing Email-Submitted Incidents

iSupport's email-submitted incident processing functionality converts entries in an email mailbox into incidents. The subject and body of the email are placed in the issue description of the incident, a link to the correspondence is included in the Audit History field, and attachments are placed on the Attachments tab of the correspondence. If the sender does not have a Customer Profile record, a new one is created.

If configured, a template may be applied to newly created email-submitted incidents. An incident may be updated if an existing incident number is included in the subject or body of an email. Rules can be set up and applied to all incoming emails (except those that contain an existing incident number in the subject or body of the email), and incident or hierarchy templates can be applied if the rules are met.

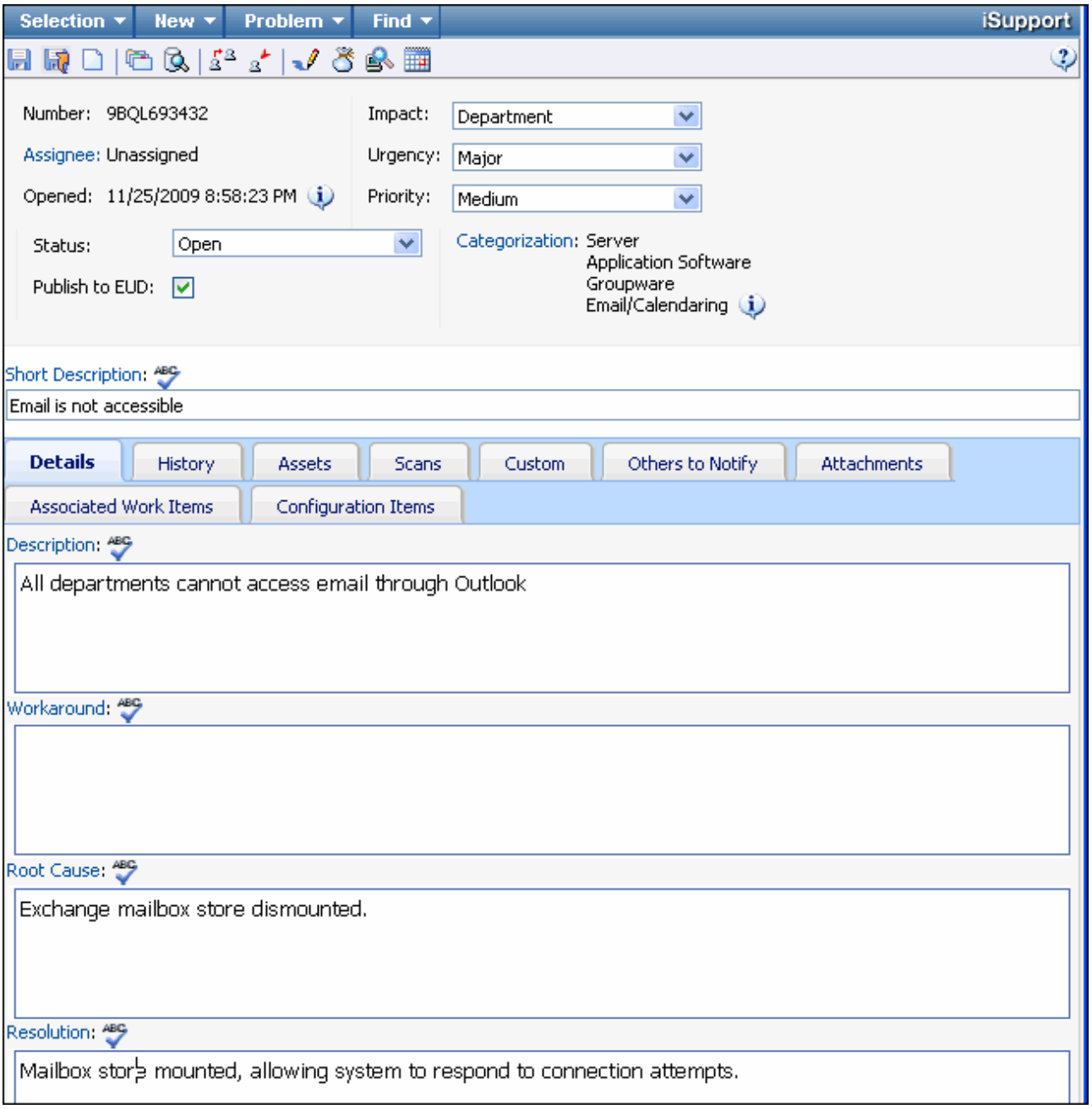
Notifications may be sent to the individuals specified by administrators in configuration.

Entering Problems

Problem functionality is available if you have the Service Desk edition. Use Problem Management functionality to document and track the root cause of issues and incidents. The Assignee, Description, Work History, Workaround, Root Cause, and Resolution fields track the process of troubleshooting the underlying issue until a resolution is discovered. You can also select a categorization, impact, urgency, and priority.

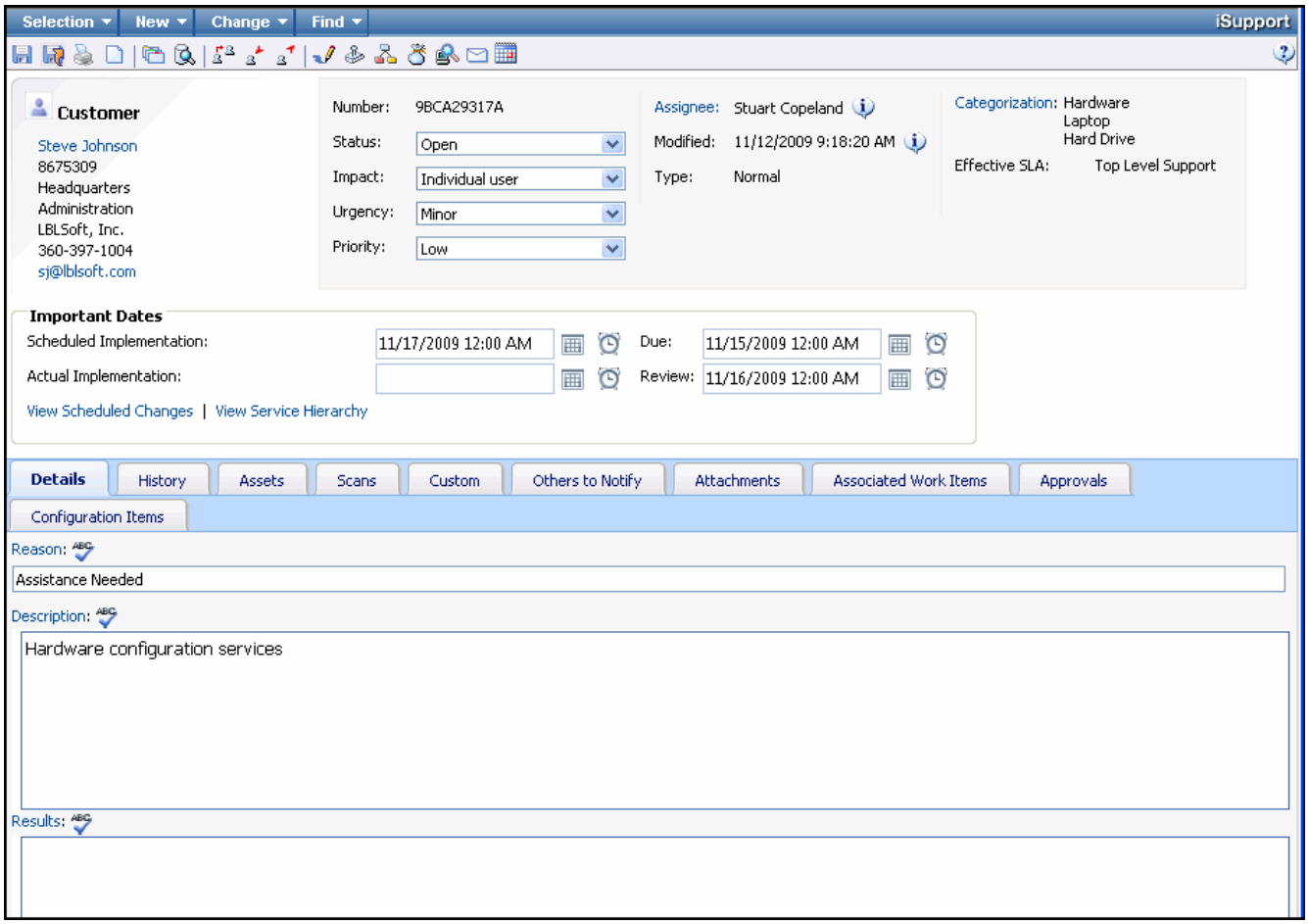
Asset, Incident, Change, and Purchase Request records can be linked to a Problem record. You can configure associated incidents to be closed when a Problem record is closed.

When a workaround and/or root cause is entered in a Problem record, the Problem record is designated as a Known Issue in reports and views on the Desktop and End User Desktop. Problem records can be published to the End User Desktop.



Entering Changes

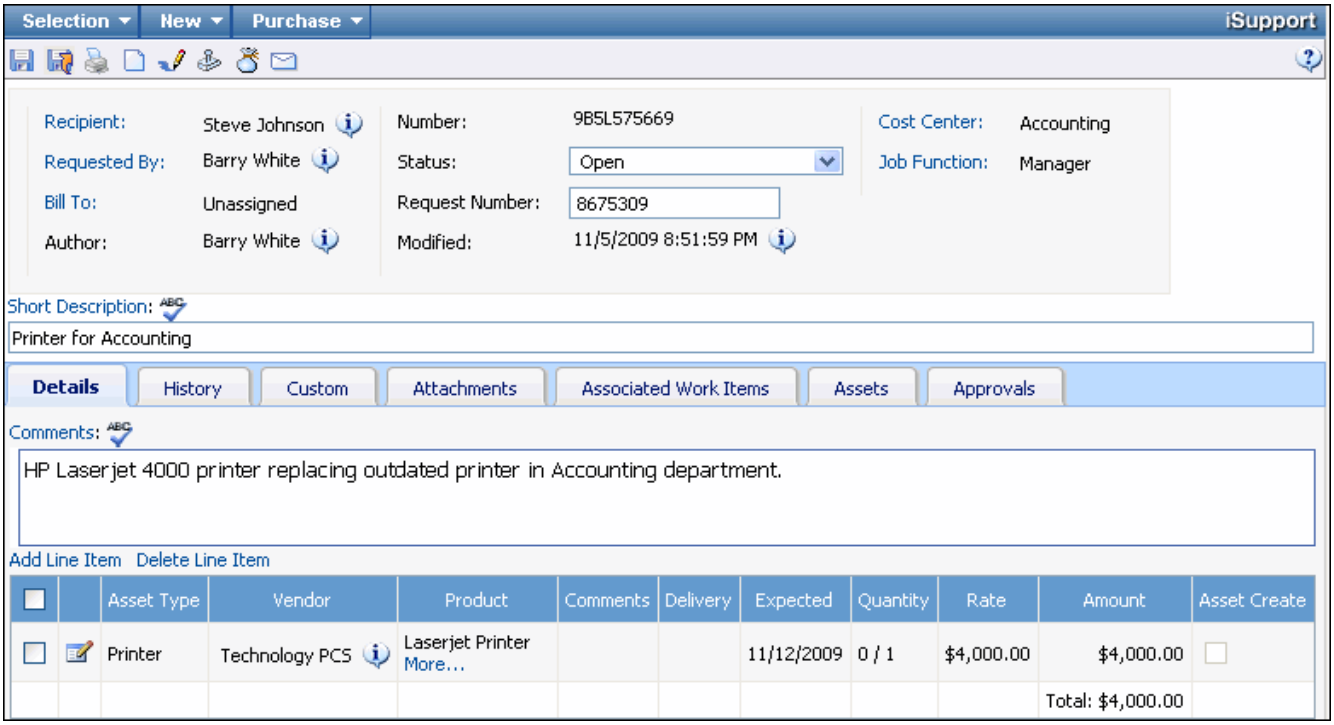
Change functionality is available if you have the Service Desk edition. Use Change functionality to record and track requests related to services and assets. Frequent requests with similar content can be automated via templates for efficient resolution. Approvals and notifications ensure communication between all involved, as well as an audit trail for any documentation requirements. A Change record can be created from the Incident screen, Problem screen, Desktop, and End User Desktop.



Entering Purchase Requests

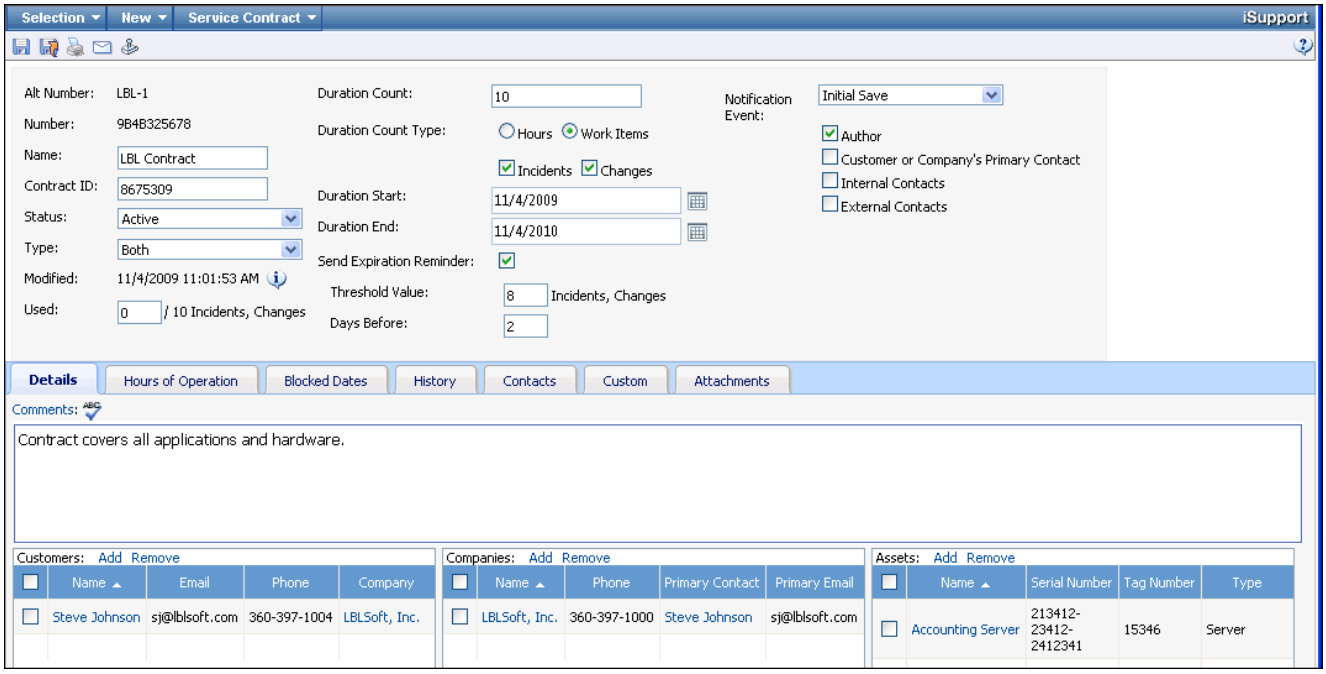
Purchase Request functionality is available if you have the Service Desk edition. iSupport's Purchasing functionality enables users to track products and services, submit purchase requests, and associate orders with Incident, Problem, Change, and Asset records. You create Product records using predefined asset types, designate customers, companies, and support representatives as vendors, and then associate vendors with products.

Purchasing functionality can be controlled via approval cycles and support representative permissions, and can include work history charges, custom fields, attachments, and cost center and job function fields for reporting. Asset records can be created from purchase orders when items are received. You can create templates for frequent purchase requests. The Purchase Request screen is shown below.



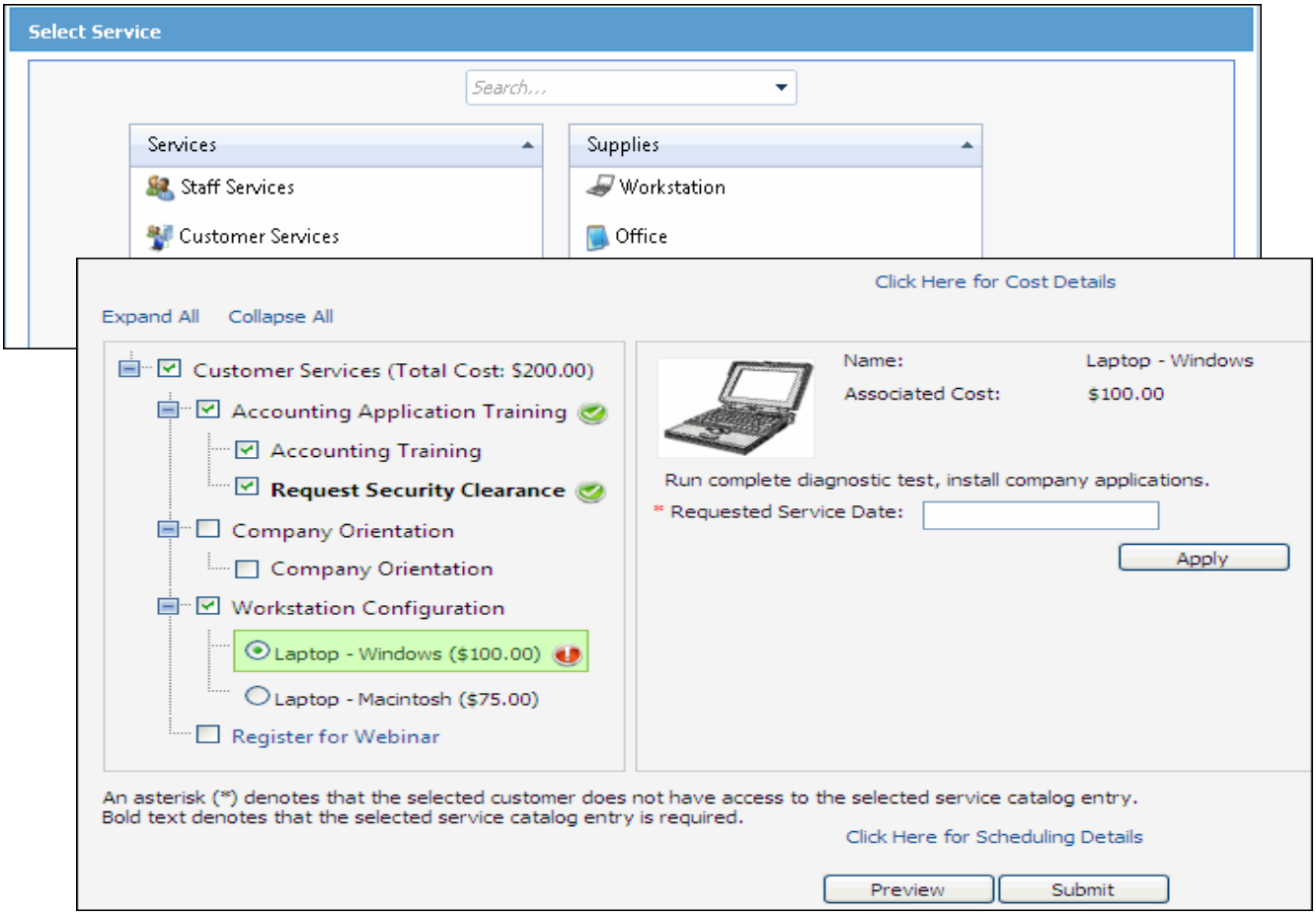
Entering Service Contracts

Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. You can set up contracts based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe). You can assign a service contract to one or more customers, companies, or assets.



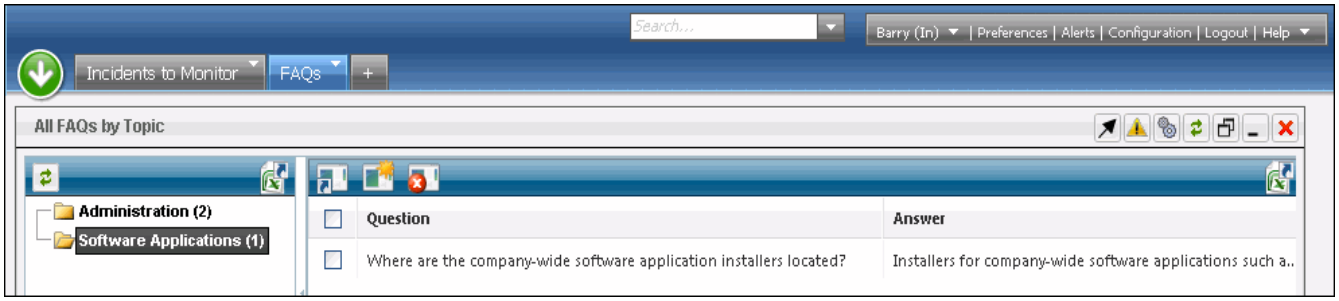
Entering Service Requests

Service Catalog functionality is available if you have the Service Desk edition. It enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the End User Desktop. The catalog will appear as follows. It can be accessed via the Service Request option on the Desktop action menu or the Service Catalog option on the End User Desktop. A link to a specific service catalog section can also be configured for the End User Desktop.



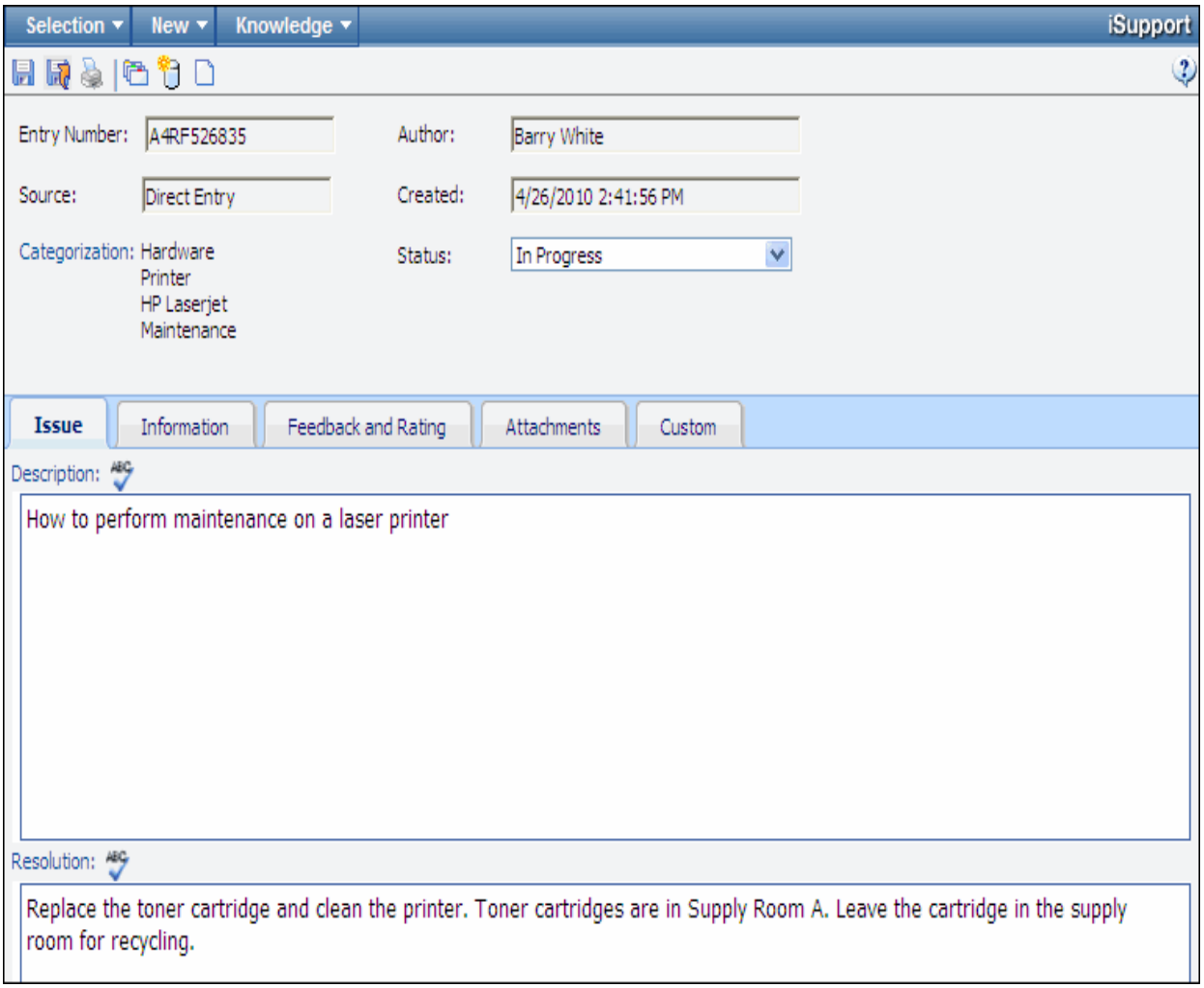
Entering and Viewing FAQs

Enter and view frequently asked questions (FAQs) via the Desktop. Customers can view FAQs on the End User Desktop.



Authoring/Accessing Knowledge Entries

You can directly **author knowledge entries** or create entries from resolved incidents and problems (if enabled). You can also search for knowledge entries based on categorization, and access RightAnswers (subscription-based knowledge content).

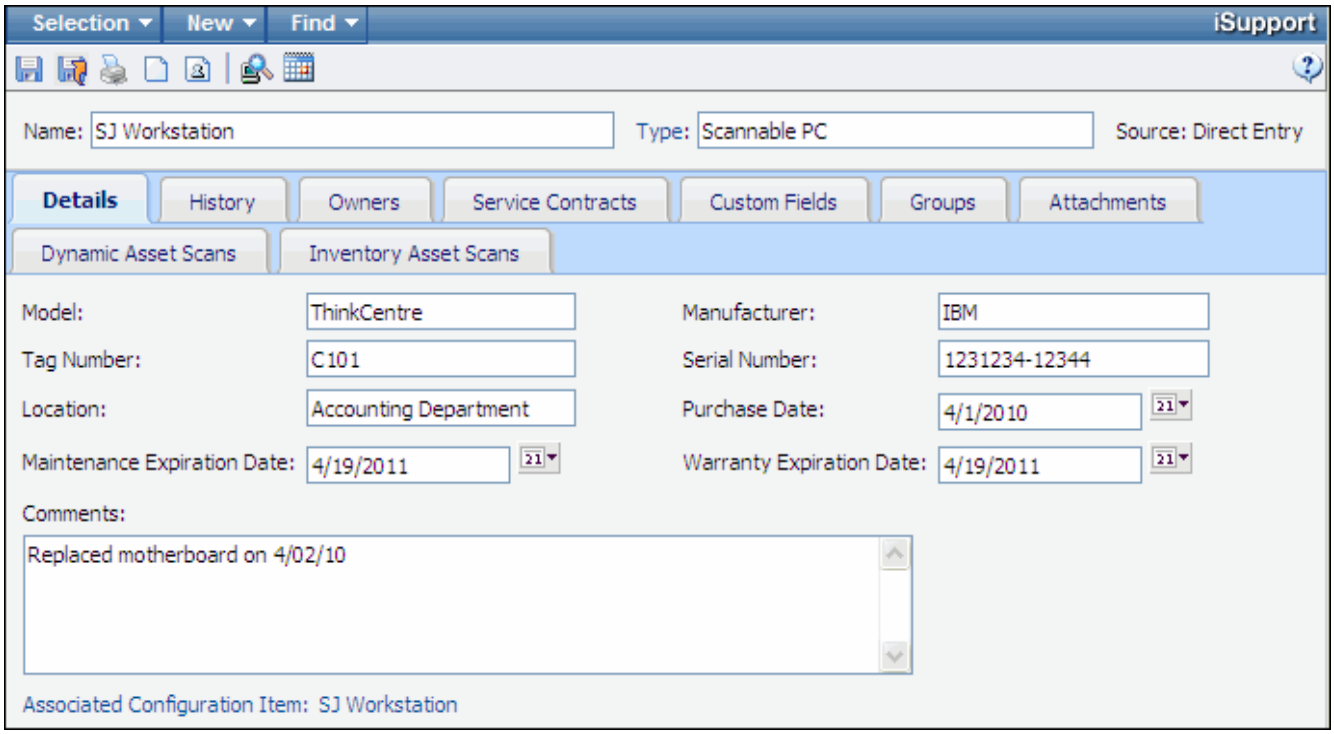


Tracking Assets

You can **record information about assets** such as computers, printers, and communication equipment. This information can be associated with a customer and pulled into an incident, purchase request, problem, or change (if enabled).

In addition to identification numbers and purchase, warranty, and maintenance information, asset types can be used for sorting assets for reporting purposes. Notifications can be configured to be sent before warranty and maintenance expiration dates.

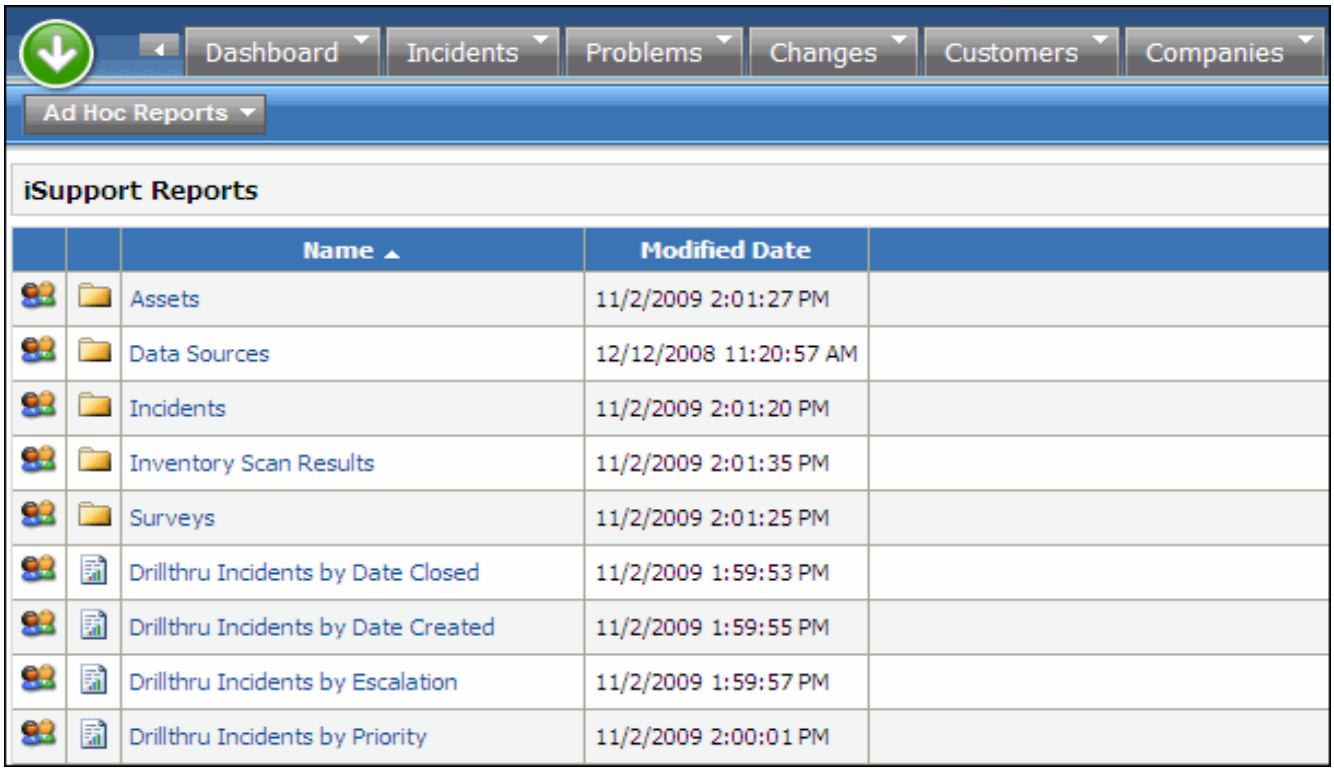
You can scan system details on customer PCs running Microsoft Windows® 98 and above (or any other WMI-compliant machine) as well as non-Windows devices on your local subnet. You can also directly enter details about assets that cannot be scanned. Warranty and maintenance contract details can be tracked.



Reporting

Use the Reports feature to generate reports of iSupport data for a specified timeframe. If you have Report Viewer permissions in iSupport, you can view SQL reports on the Desktop via the Reports tab or a Report Viewer frame. Reports in the iSupport/Reports folder on the report server will be included.

iSupport includes report models of iSupport database data built with Microsoft Report Designer. If you have a version of Microsoft SQL Server 2005 other than Express Edition, you can create reports based on these models using Microsoft Report Builder and Microsoft Report Designer. If you have iSupport's Ad Hoc Reports permission, you can access Microsoft Report Builder via the iSupport Reports tab to create ad hoc reports using a simple drag and drop interface. More information on this feature is available by selecting Ad Hoc Reports | Documentation on the Reports tab.



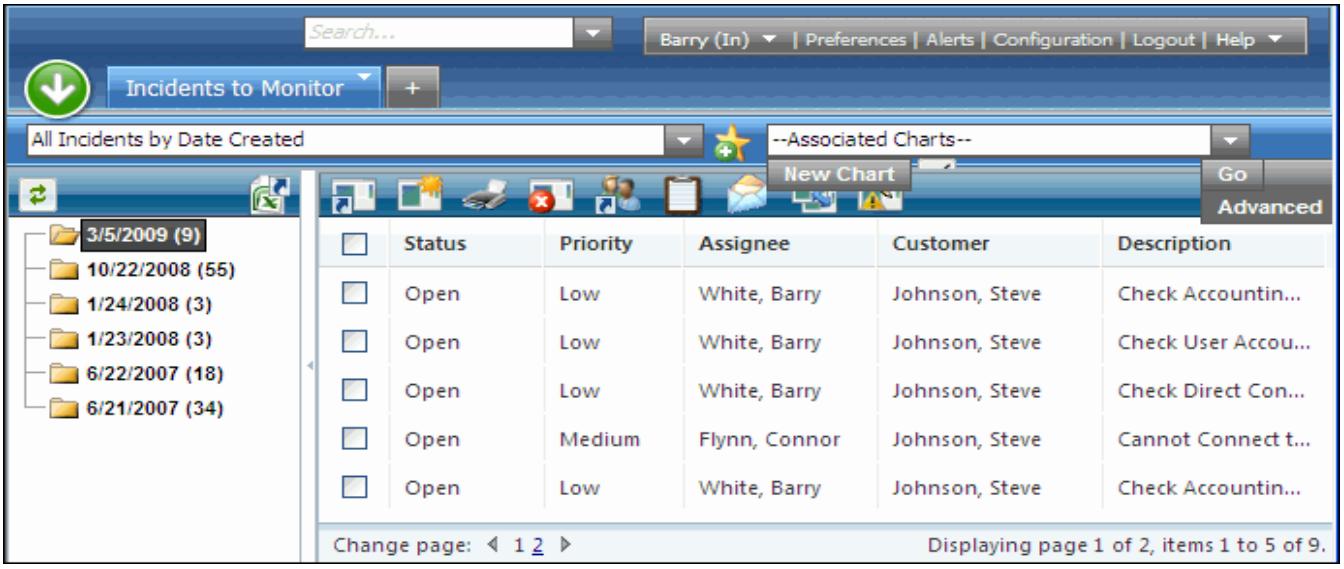
Keyboard Shortcuts

Throughout the application, you can use Microsoft® Internet Explorer® keyboard shortcuts such as Ctrl+W to close a window or Ctrl+F to display the Microsoft® Internet Explorer® Find dialog for text searching.

You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page

- Press Alt < to jump back to the last page



You can press Ctrl+N to access the Incident screen.

The End User Desktop

The End User Desktop (EUD) enables customers to submit and view incidents, service requests, purchase requests and changes, view problems, browse and search for knowledge entries, view headlines and FAQs, and access URLs. The End User Desktop is fully configurable; administrators can set up the feature links, fields that appear for viewing and submitting records, colors, etc.

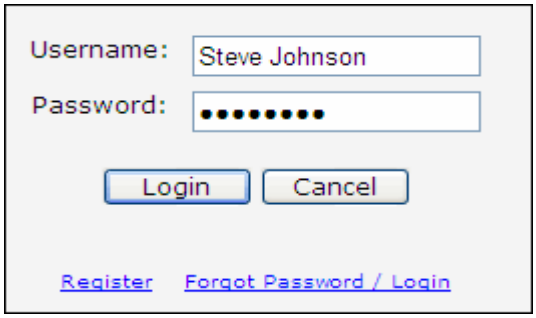
Multiple End User Desktop interfaces may be set up to target different customer groups. Use any current version HTML-compatible browser to access the End User Desktop.

Options Available on the End User Desktop

The links that display and available options depend on how the Desktop is configured. Therefore, the feature names in the following sections may be labeled differently on your Desktop.

Customer Information

- **Login**: Authentication (logging in) can be configured to be required in order to access the End User Desktop or to use the Submit Incident, View Incident, or template features. The End User Desktop login information is set up in Customer Profiles.



The password field is case sensitive. If a customer does not have a Customer Profile record, he/she will need to enter a name and email information to create an incident. After logging in, the customer's name will appear.

You can individually prevent access to the End User Desktop by clearing the Enable EUD Access checkbox on a customer's Customer Profile record.

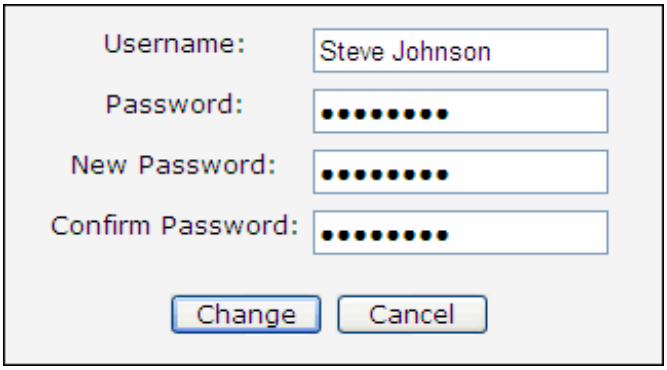
If no authentication is configured to be required, a customer will need to enter an email address in order to submit an incident or change (if enabled) and use that email address to view incidents and changes. A customer can also use templates. A Customer Profile record will be created after his/her first incident or change is submitted if one does not already exist for the email address and login name.

- **Register:** If a Register link is configured to be included on the End User Desktop, a customer can complete his/her contact information and set up a login. A Customer Profile will be created

if one does not already exist for the email address and login name. A Customer Profile record will be created with the Approved to Access EUD checkbox enabled.

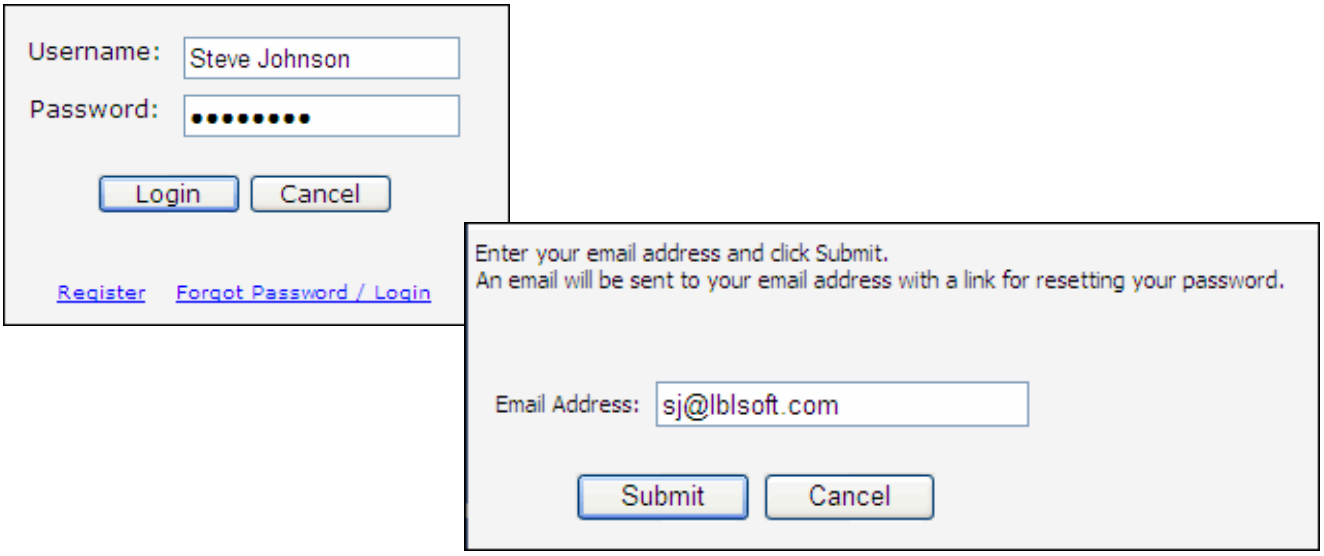
A customer will not be able to register with the same email address and login name as another customer.

- **Change Password**: This option enables the customer to change their password to access the EUD. The new password will be updated in the customer's Customer Profile record.



Customers cannot use the Change Password function if integration with Microsoft® Active Directory® is enabled.

- **Forgot Password/Login:** a Forgot Password/Login link can be enabled to appear in the End User Desktop Login dialog.



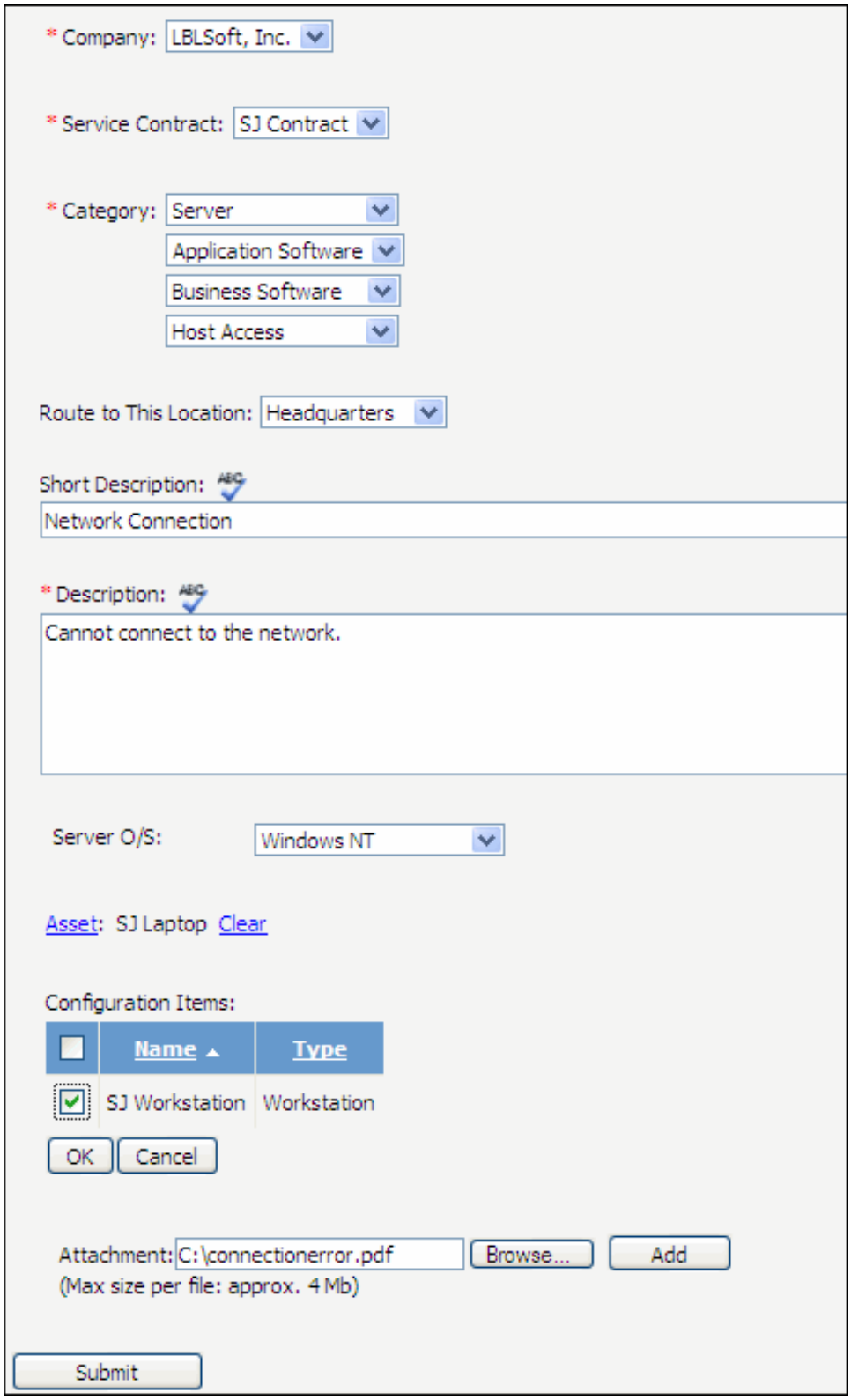
When the customer clicks the link, a dialog appears for the customer to enter his/her email address. When the customer enters his/her email address and clicks Submit, the following can occur:

- An email will be sent to the email address if the email address is associated with a single customer. The email will include the customer's login name and a link for resetting the End User Desktop password. When the customer sets the new password, it will be updated in the appropriate Customer Profile record.
- If no customer profile is associated with the email address, an error appears along with the Register link (if enabled in the End User Desktop Configuration screen).
- If the email address is associated with more than one customer profile, a dialog appears for the customer to enter his/her login name. After the customer enters a valid End User Desktop login name, the email will be sent for the customer to reset his/her password. If the Register option is enabled in the End User Configuration document, the dialog also includes a Request a Login link. When clicked, the customer can enter his/her name and contact information, click Submit, and an incident will be created for the forgotten login request.

Incidents

- **Submit Incident**: Customers can submit incidents from the End User Desktop. The issue description field will always display; fields can also be included for categorization, assets, and custom fields. When a customer categorizes an incident via the End User Desktop and there are

one or more knowledge entries with categories that match the selection, a View Knowledge for Selected Category link will appear for accessing the entries.



Links to incident templates can also be included. Incident templates contain defaults for the incident issue description and resolution, categorization, assignee, priority, and custom fields. If an auto-close incident template is included on the End User Desktop, the incident status will *not* change to Closed; the incident will remain open. If a hierarchy template is included, only the top-level template will display when the link is clicked.

Custom SLAs for the customer or category set are applied on EUD-submitted incidents. However, if a custom SLA is associated with a template, the template SLA will override any SLAs assigned to the category or customer.

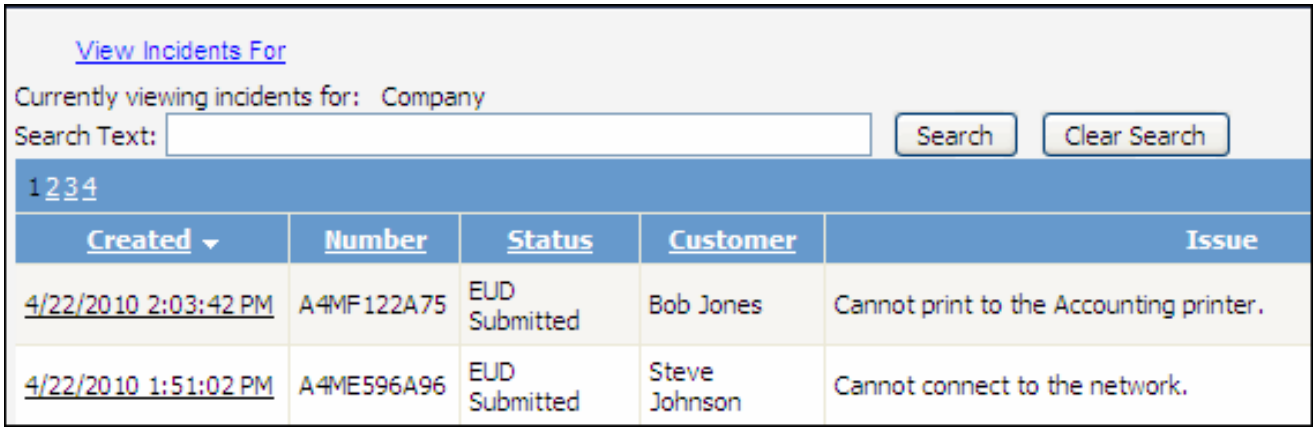
If a call script is enabled for a category set, it will not display on the End User Desktop.

Fields for selection of an asset, configuration item, and attachment may be configured.

If a customer submits an incident with contact information that is different from the information in his/her Customer Profile record, the information in the Customer Profile record will be overridden on the submitted incident. However, the information will not be overridden if integration with Microsoft® Active Directory® or Microsoft® CRM is enabled.

- **View Incidents**: Depending on what is specified in a customer's Customer Profile record, this option displays a list of incidents submitted by a customer or the customer's company, department, location, or group. The customer can display incident information by clicking on the date created.

  Authentication (logging in) may be configured to be required in order to access the View Incidents feature. The Log In dialog will display when the link is clicked. If authentication is not required, the customer *must* enter an email address order to view his/her incidents.



The fields displayed to customers are set up during configuration. A link may be included for customers to send an incident update email and attach a file.

First Name: Steve
Last Name: Johnson
Company: LBLSoft, Inc.
Location: Headquarters
Phone: 360-397-1004
Email: sj@lblsoft.com

Date Created: 22-Apr-2010 13:51
Number: A4ME596A96
Status: EUD Submitted
Urgency: Minor
Impact: Individual user
Assignee: Stuart Copeland
Service Contract: SJ Contract

Category: Server
Application Software
Business Software
Host Access

Short Description:
Network Connection

Description:
Cannot connect to the network.

History:
4/22/2010 1:51:02 PM - - New incident created.

SLA History:
4/22/2010 1:51:02 PM - Incident created with Top Level Support priority SLA. - Configured settings: Low - 8 hrs, Medium - 4 hrs, High - 1 hrs, Emergency - 0.5 hrs, Emergency Occurrences - 4 max, Closure - 16 hrs. - Priority: Low.

Audit History:
4/22/2010 1:51:02 PM - Set Priority **To:** Low - Set Status **To:** EUD Submitted - Set Customer **To:** Steve Johnson - Set Category **To:** Server - Application Software - Business Software - Host Access - Set Assignee **To:** Stuart Copeland - Set Group **To:** Applications - Set Short Description **To:** Network Connection - Set Description **To:** Cannot connect to the network. - Set Impact **To:** Individual user - Set Urgency **To:** Minor - Added to Assets: SJ Laptop. - Set Service Contract **To:** SJ Contract - Set Company **To:** LBLSoft, Inc. - Added to Associated Configuration Items: SJ Workstation.
4/22/2010 1:51:02 PM - New incident created. **From:** End User Desktop. - Set Priority **To:** Low - Set Status **To:** EUD Submitted (Open)
4/22/2010 1:51:02 PM - Applied against Service Contract: SJ Contract.

Server O/S: Windows NT

Asset Details:

Name	Type	Tag Number	Serial Number
SJ Laptop	IBM Thinkpad	C0293	987654-65435-6546

Configuration Item Details:

Name	Type
SJ Workstation	Workstation

File Attachments:

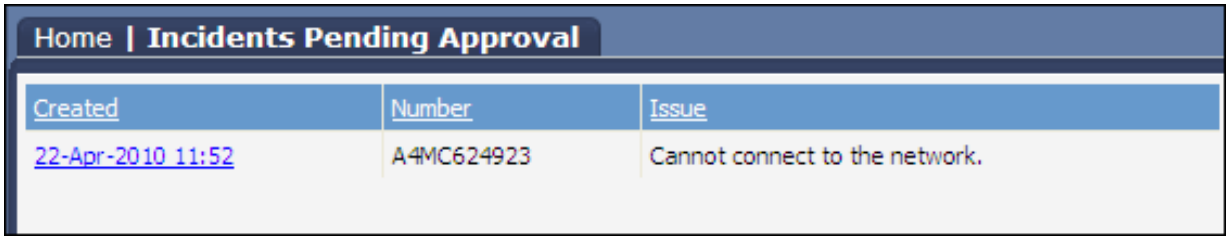
Attached File	Type	File Size
connectionerror.pdf	application/pdf	141,666 bytes

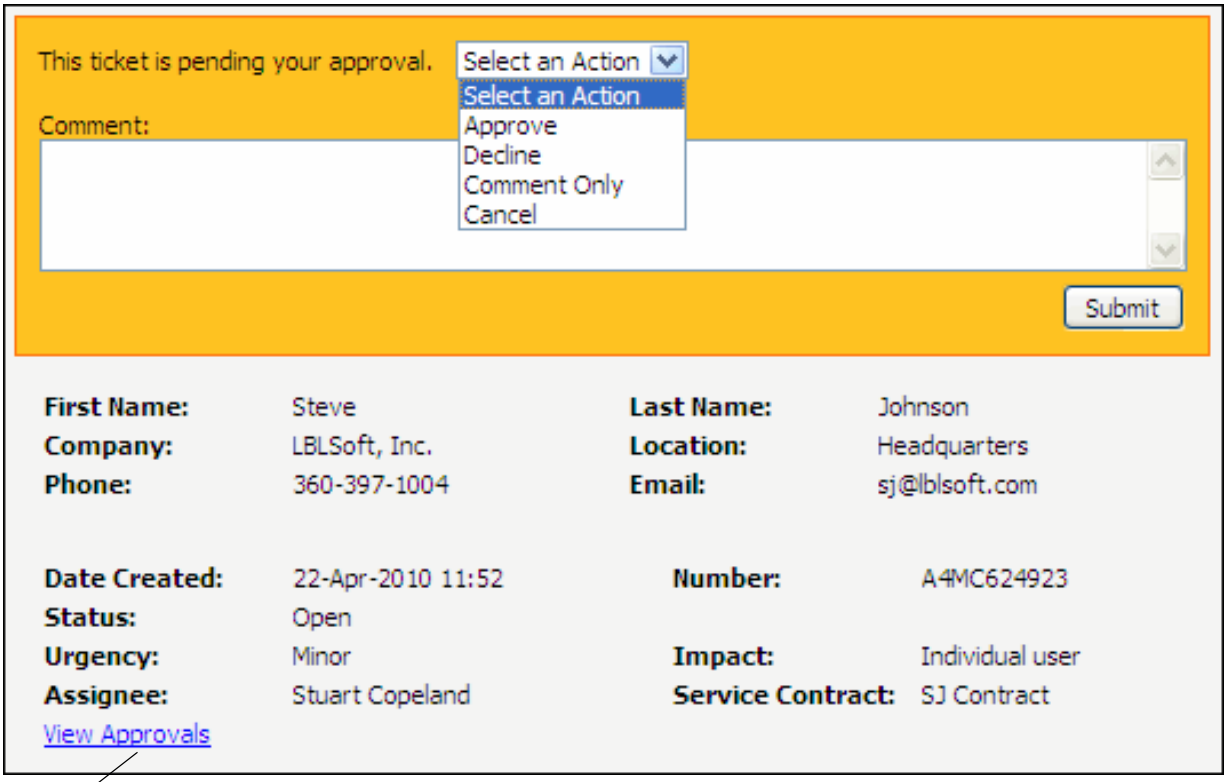
Total: 141,666 bytes

Update This Incident:

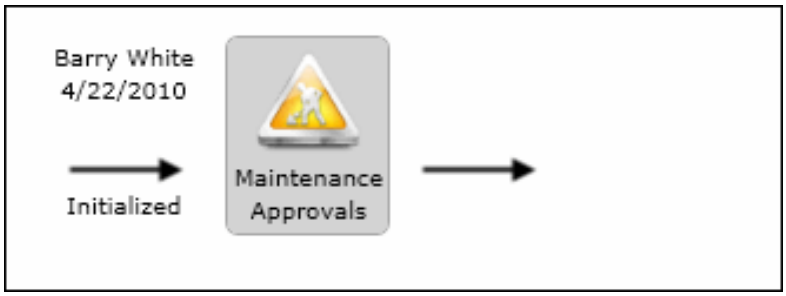
Attachment: Browse...
(Max size per file: approx. 4 Mb)
Send Update

- **Incidents Pending My Approval:** This option displays a customer's incidents that are pending approval (the customer is the current approver due to specify a verdict). The customer can use the alert bar to specify a verdict (Approve, Decline, or Comment Only).





Users can click the View Approvals link to display a graphic representation of the approval process



Problems

Problem functionality is available if you have the Service Desk edition. You can view all Problem records with the Publish to EUD checkbox enabled.

Created	Number	Status	Description	Workaround	Resolution
16-Sep-2008 14:29	89GF3A427A	Open	Server down in Accouting		
16-Sep-2008 14:24	89GF353436	Open	Printer dropped from network	Select the printer in the hall (network ID prn128). Redirect all print jobs to this printer until issue is resolved.	
24-Jan-2008 9:44	81PA552327				

Home | Problems | **Problem**

Create Associated Incident

Date Created: 25-Nov-2009 20:58 **Number:** 9BQL693432

Status: Open

Urgency: Major **Impact:** Department

Category: Server

Short Description:

Email is not accessible

Long Description:

All departments cannot access email through Outlook

Root Cause:

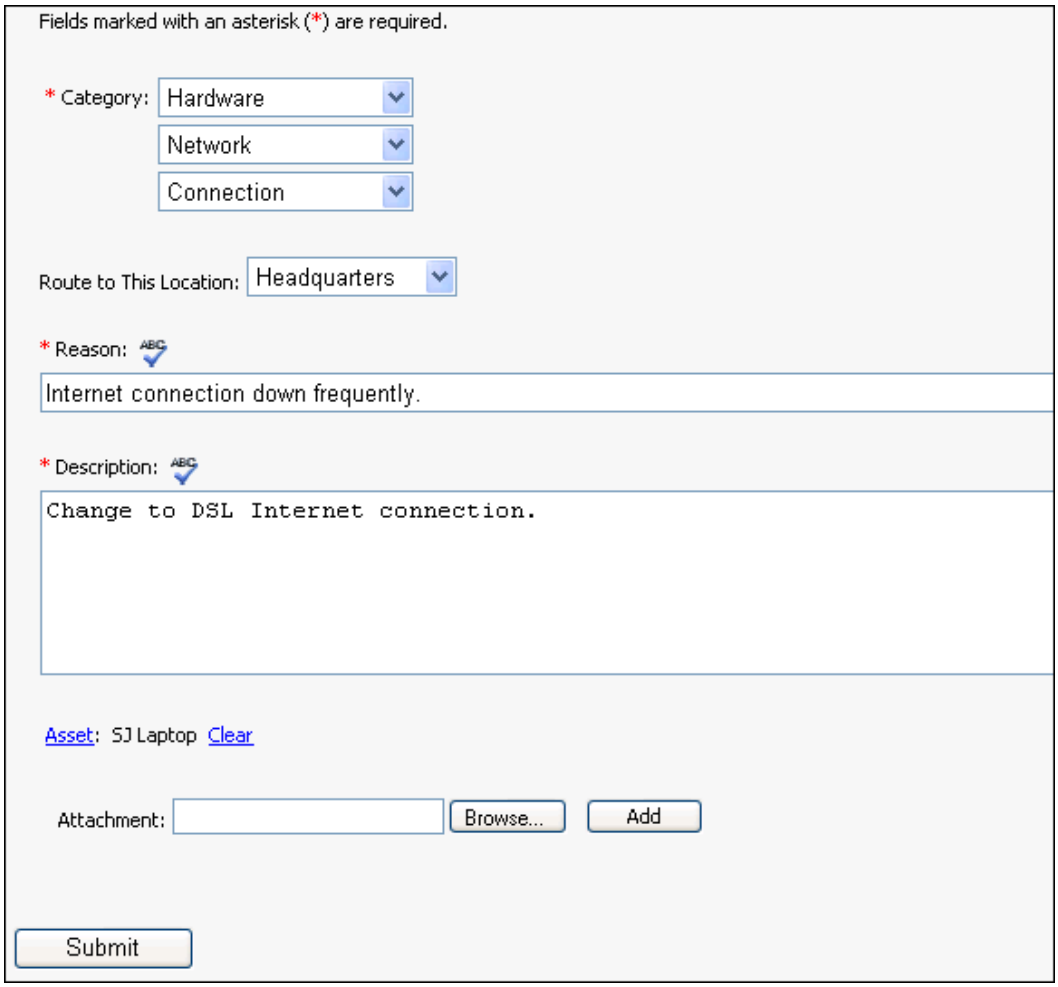
Exchange mailbox store dismounted.

Users can click the Create Associated Incident link to submit an incident that will be related to the problem. The text in the Short Description field will be included by default in the Description field in the Incident record.

Changes

Change functionality is available if you have the Service Desk version.

- **Submit Change:** The fields included on the EUD Submit Change screen, default EUD-submitted change owner, and the text to display after the change is submitted are specified in configuration.



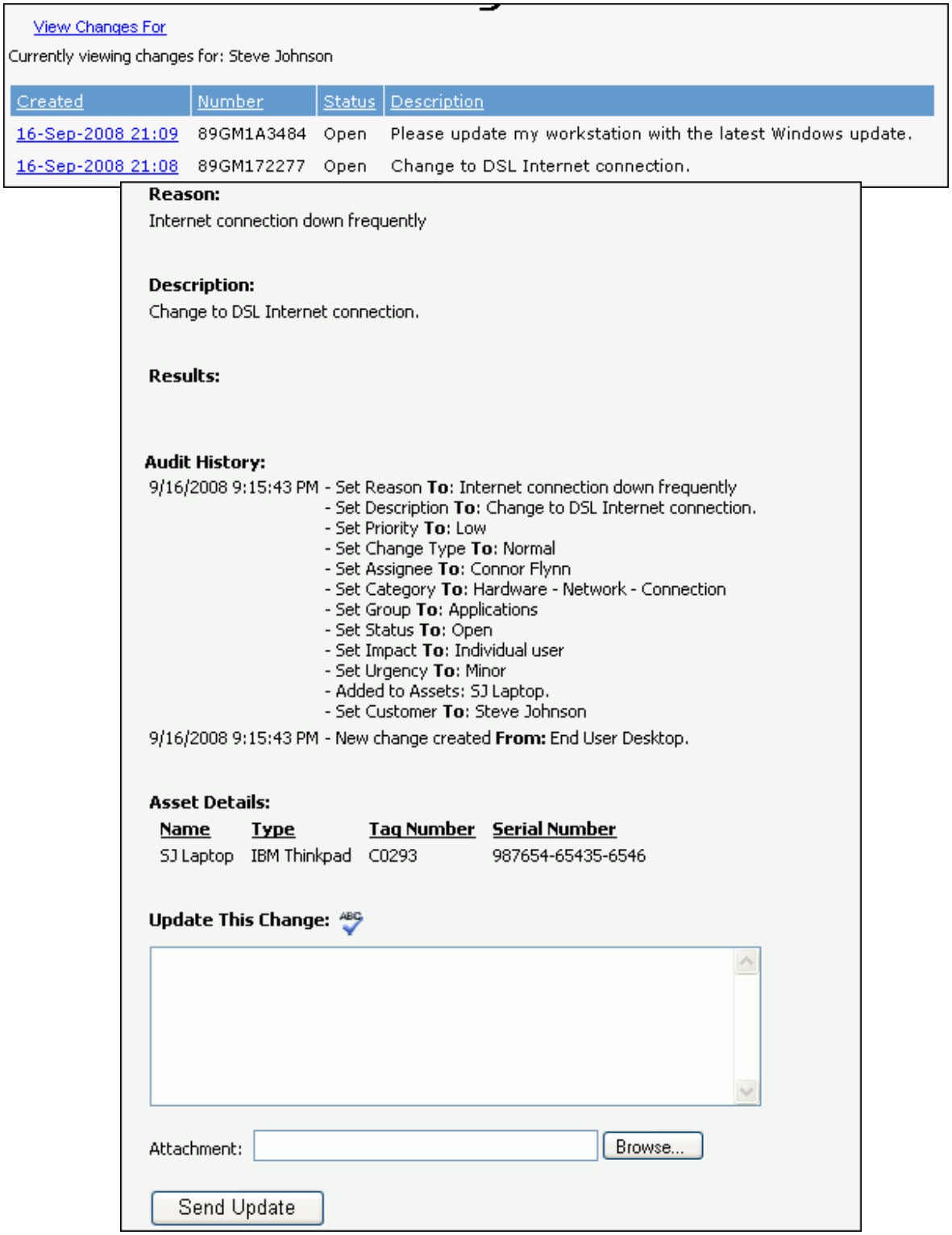
Links to Change templates can be included; change templates have defaults for populating Change record fields. A service level agreement (SLA) can be assigned to a template; when the template is selected from the End User Desktop, it takes effect based on the change creation date and time. Links to hierarchy templates can also be included; however, only the top-level template will appear when the link is clicked.

When an end user clicks a link for a change template and completes the fields, a change will be submitted. Any SLA associated with the lowest level of category will be applied. If none is associated, the next (higher) category level is searched, and so on. If a custom SLA is associated with a template, the template SLA will override any SLAs assigned to the category or customer.

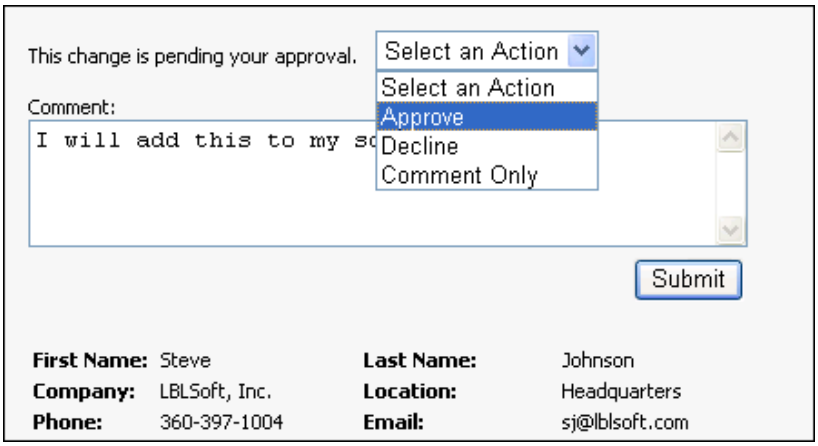
If a call script is enabled for a category set, it will not display on the End User Desktop.

Fields for selection of an asset, configuration item, and attachment may be configured.

- **View Changes**: Depending on what is specified in a customer's profile record, this option displays a list of changes submitted by a customer or the customer's company, department, location, or group. Customers can display change information by clicking on the date created. The fields to be included in changes displayed on the EUD are specified in configuration. A link can be included for customers to send a change update email.



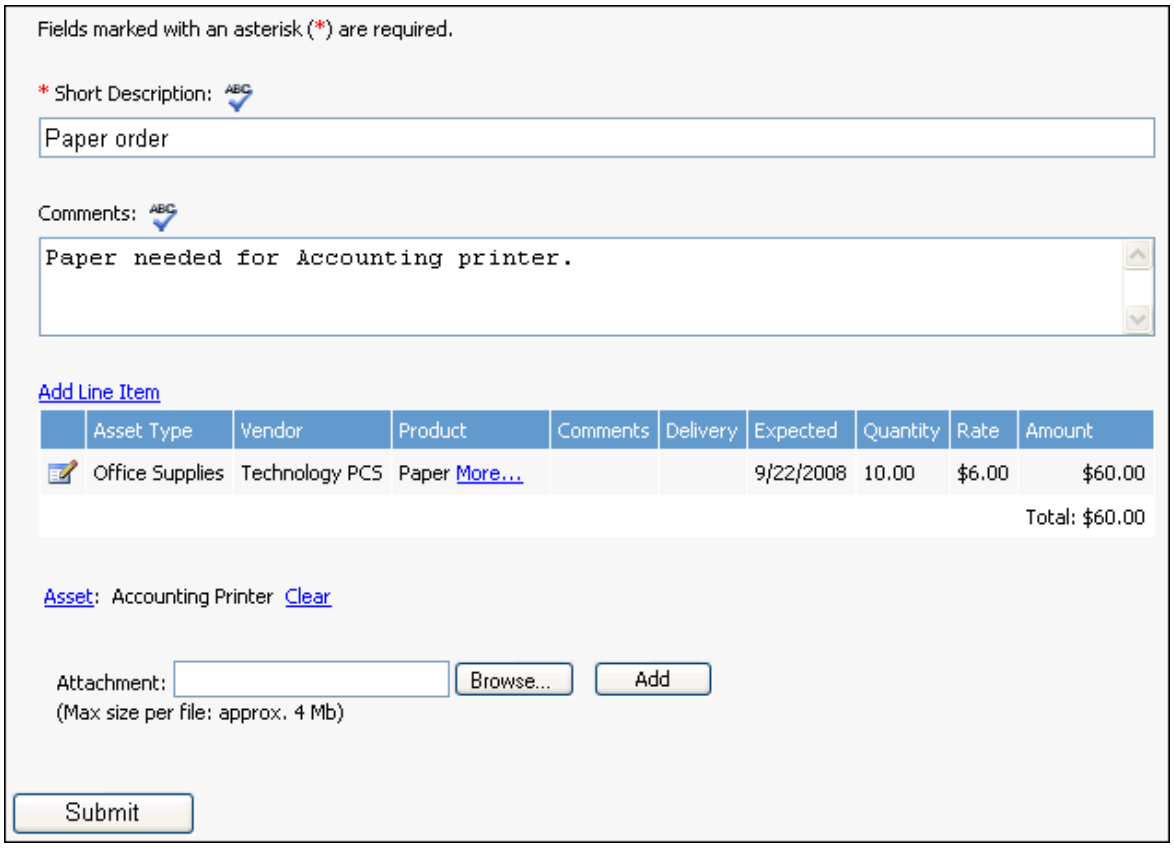
- **Changes Pending My Approval:** You can view the customer's changes that are pending approval (the customer is the current approver due to specify a verdict). The customer can use the alert bar to specify a verdict (Approve, Decline, or Comment Only).



Purchase Requests/Orders

Purchase request functionality is available if you have the Service Desk edition.

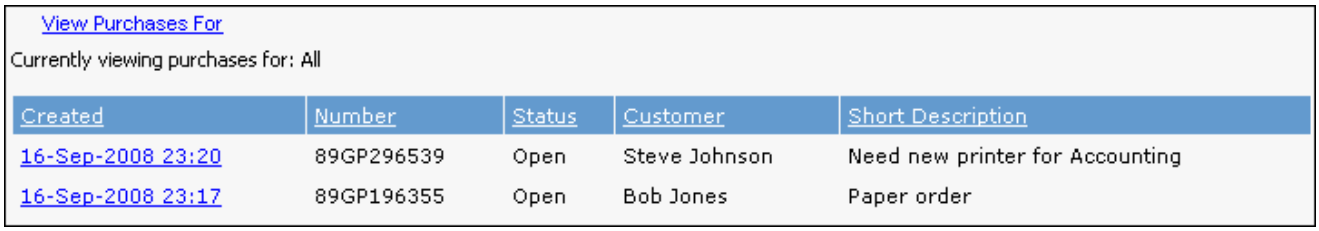
- **Submit Purchase Requests:** Customers can submit purchase requests from the End User Desktop. The fields to be included on EUD purchase requests can be configured, as well as the default EUD-submitted purchase request owner and the text to display after the purchase request is submitted.



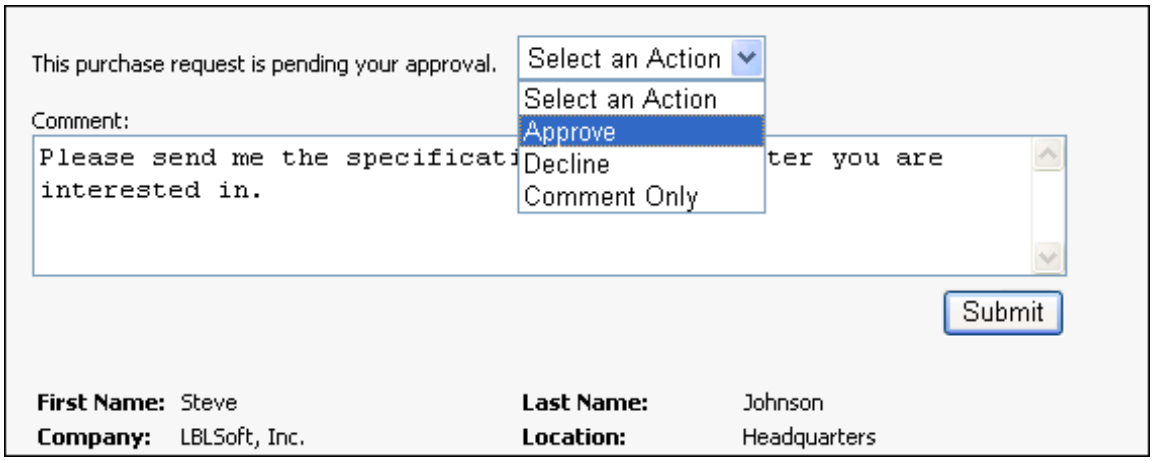
If the Initial Purchase Request Save notification is configured, an email can be sent to the customer when a purchase request is submitted from the End User Desktop.

Links to purchase request templates can also be included.

- **View Purchase Requests/Orders**: Depending on what is specified in a customer's profile record, purchase requests/orders submitted by a customer or the customer's company, department, location, or group can be viewed on the End User Desktop. Customers can sort purchase request information by clicking on the date created. The fields included when EUD purchase requests are displayed can also be configured.

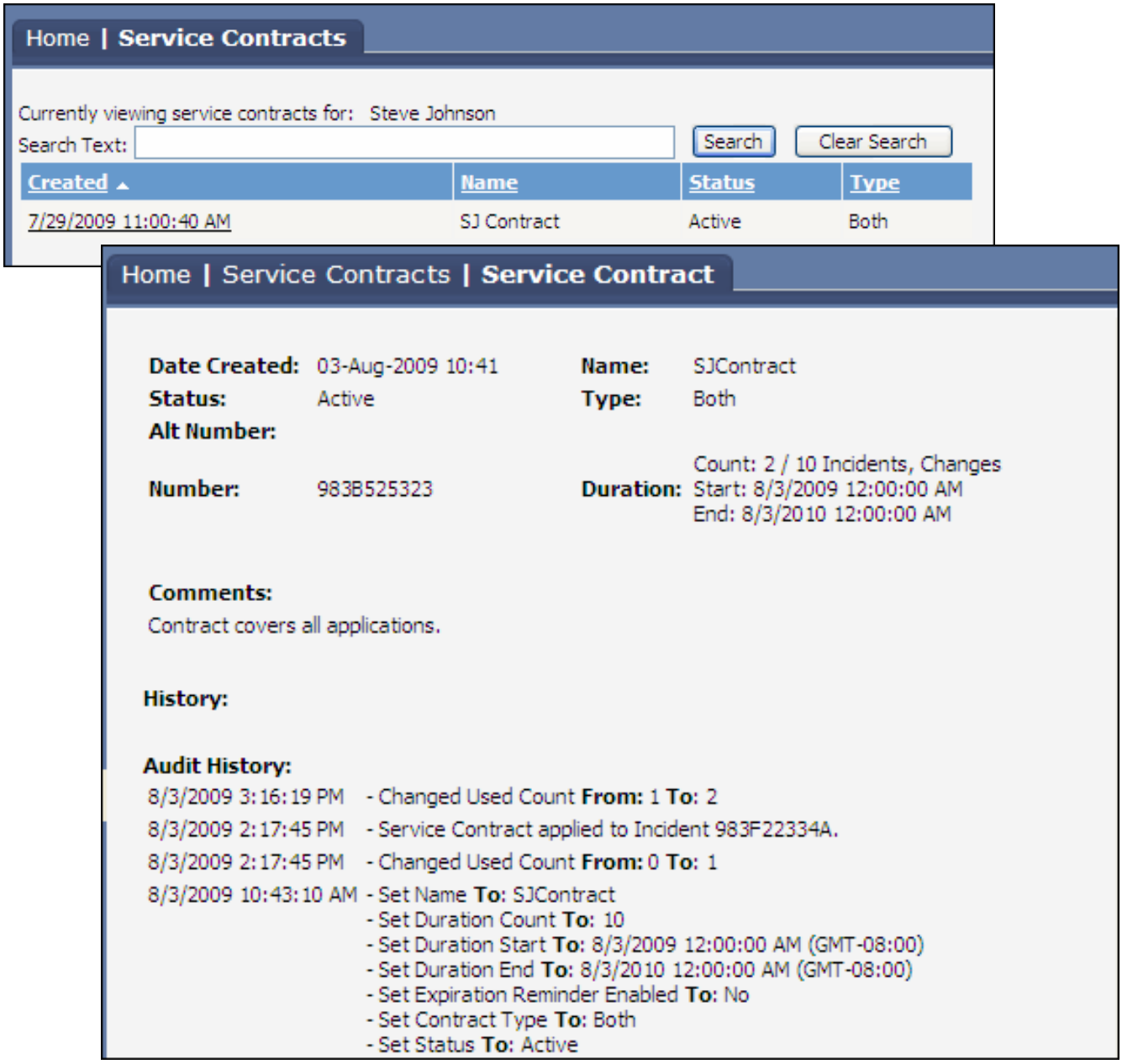


- **Purchase Requests Pending My Approval:** Customer purchase requests that are pending approval can also be configured (the customer is the current approver due to specify a verdict). The customer can use the alert bar to specify a verdict (Approve, Decline, or Comment Only).



Service Contracts

Service Contract functionality tracks and restricts incidents and changes for customers, companies, and/or assets. Contracts can be configured based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe). A service contract can be assigned to one or more customers, companies, or assets. A link can be added to the End User Desktop to display the customer's assigned service contracts.

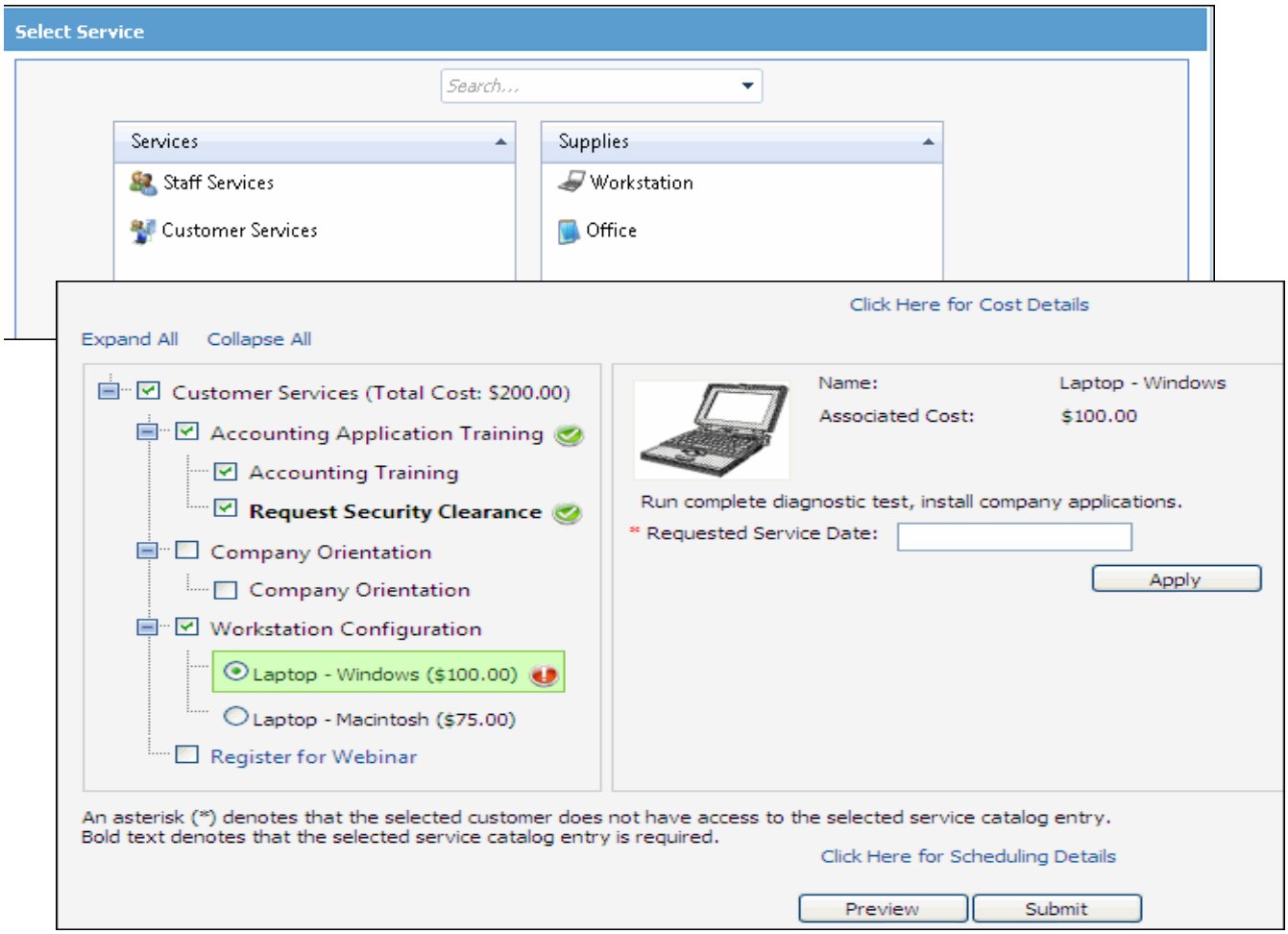


Service Requests

Service Catalog functionality enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the End User Desktop. Note that access to an entire service catalog or individual service catalog entries may be restricted to specific customer and support representative groups.

Service catalogs are entered in the Configuration module; each contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

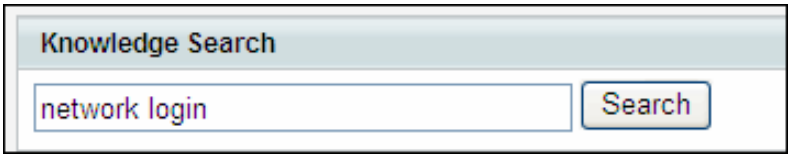
The catalog will appear as follows to customers using the End User Desktop. Note that display of the dollar amount next to an entry is controlled by the Can View Service Cost field in the customer's Profile record. The Total Cost amount includes the cost of all selections (including line items from the purchase template).



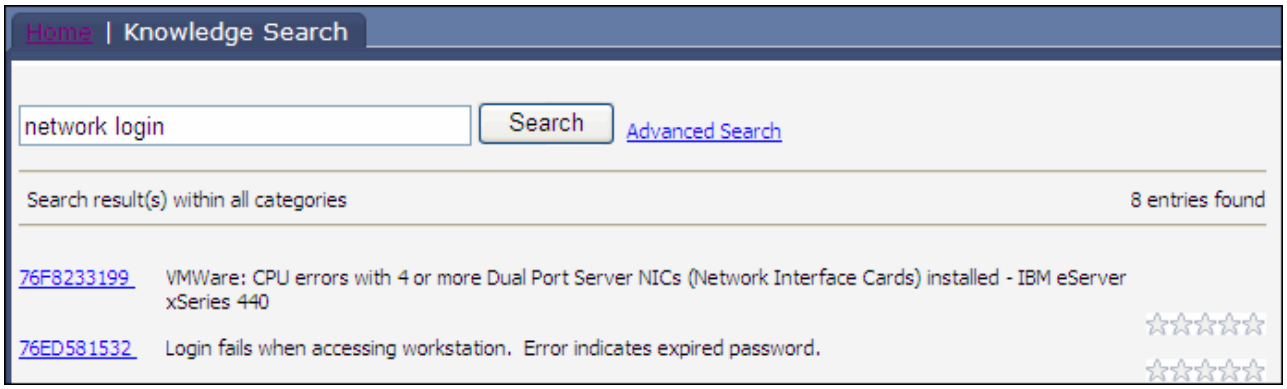
Information Searching

- **Knowledge Base**: This option displays a list of all knowledge entries that have been designated as Approved External. iSupport performs full text searches, so entries are returned if a match is found with any word in the phrase; different tenses of words are also used in the search. Noise words (commonly used words that not useful to searching such as "a," "and," and "the") are left out of the full-text index.

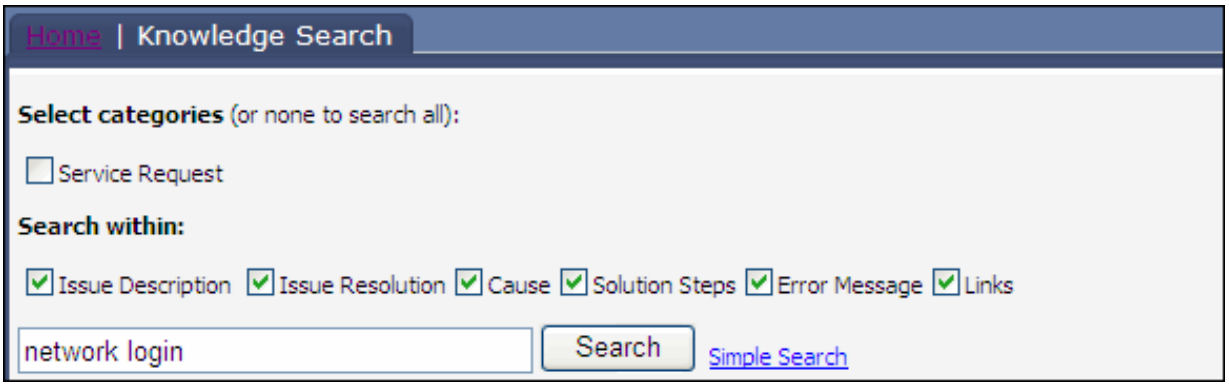
  Customers can use the Simple Search to enter a full or partial word or phrase and perform the search.



  Search results display in a list.

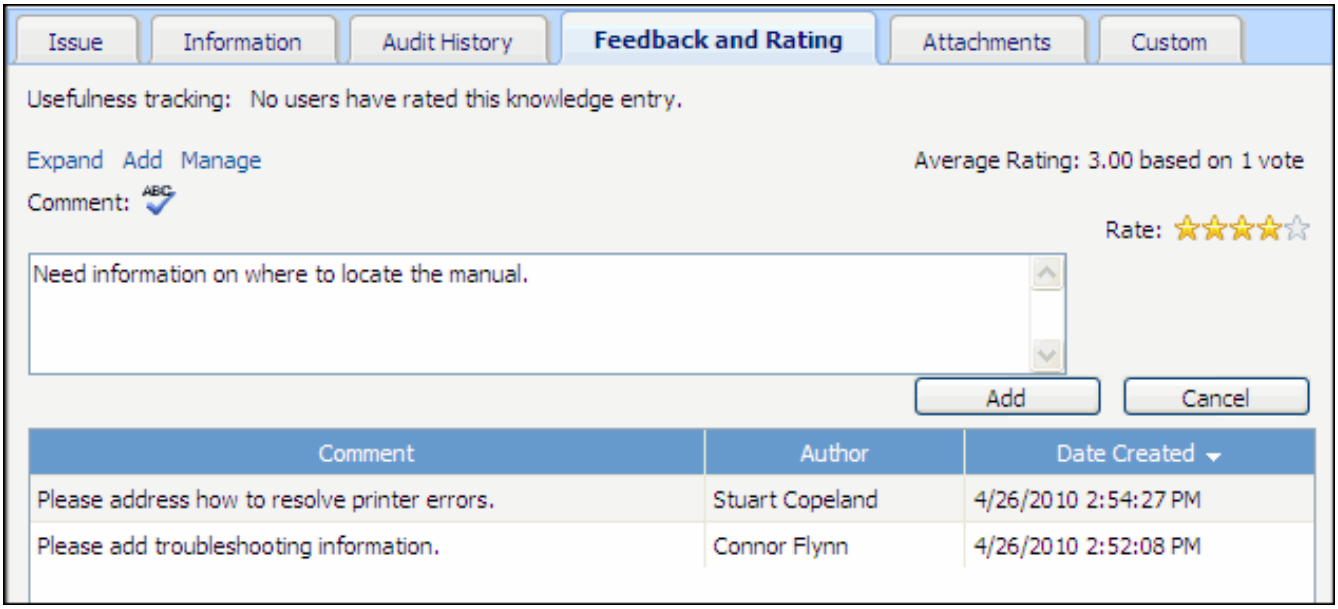


  Use the Advanced Search link to display fields for searching knowledge entries associated with one or more categories and/or search specified knowledge entry fields.

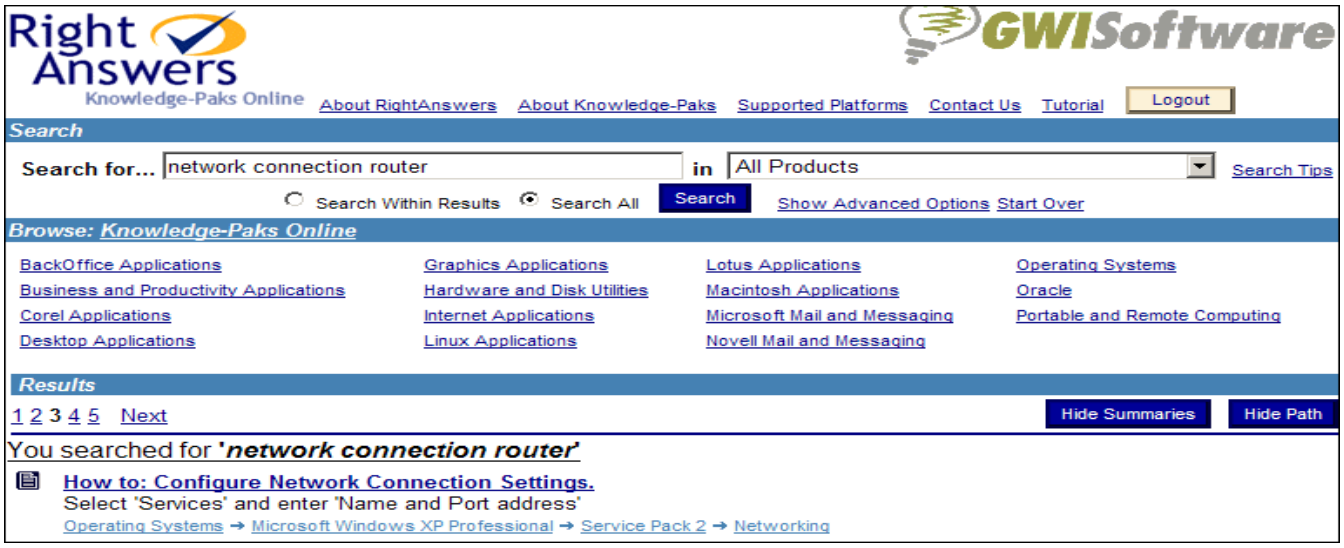


  When a customer categorizes an incident via the End User Desktop and there are one or more knowledge entries with categories that match the selection, a View Knowledge for Selected Category link will appear for accessing the entries.

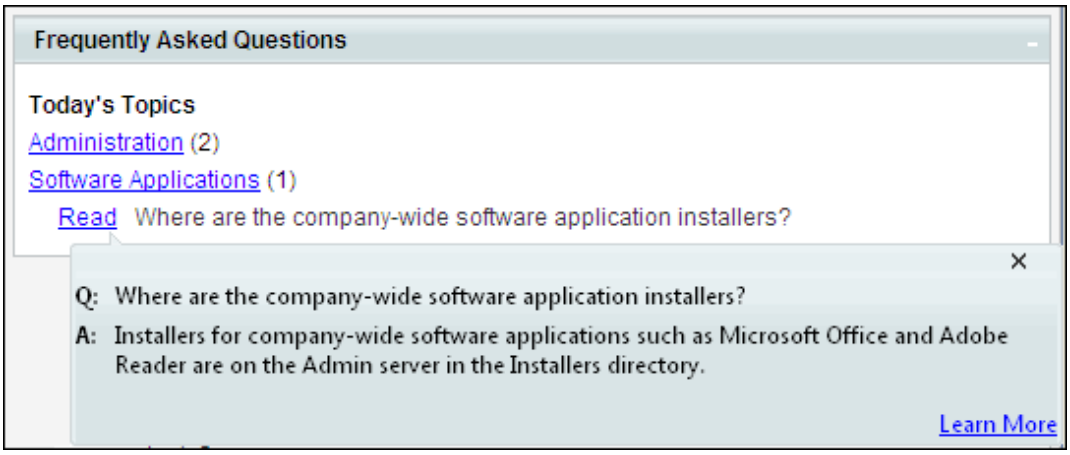
If configured, feedback and rating fields may appear for customers to provide comments and rate knowledge entries.



- **RightAnswers Integration:** A link can be included for accessing RightAnswers, which enables customers to access subscription-based knowledge content for common PC hardware, software, and network issues.

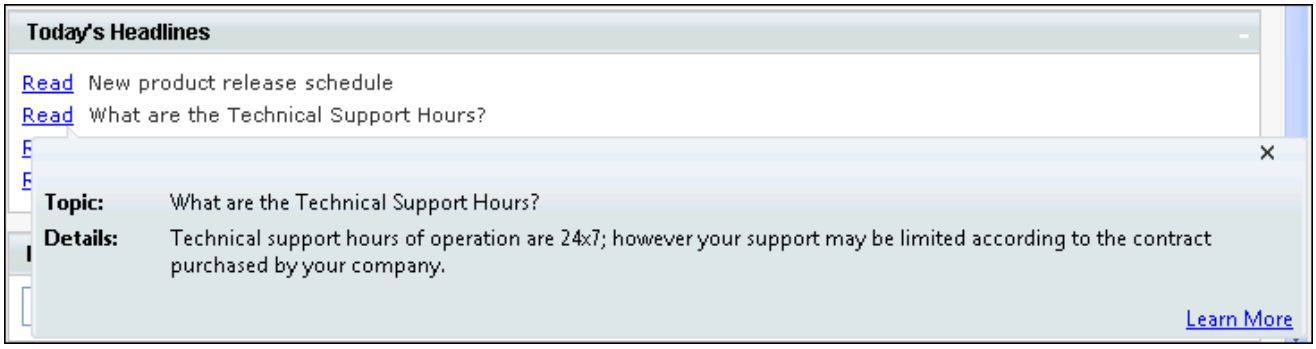


- **FAQs**: This option displays a list of frequently asked questions; when a user clicks the Read link, the answer appears along with a Learn More link for displaying the information in a larger window. You can create topics to sort FAQs on the Desktop and End User Desktop.



Headlines

Customers can view informational headlines with details. An expiration date can be configured for each headline.



Mobile Desktop

Use the Mobile Desktop microbrowser interface to create, edit, and view Incident, Change, Customer Profile, and Company records via a Blackberry®, iPhone, or other handheld device. If you have permission in your Support Representative Profile record, you can access this functionality via any web browser. Some functionality (for example, the Cancel button) will be disabled if JavaScript

is disabled or the browser does not support JavaScript. If JavaScript is later enabled, you'll need to logout and log back in.

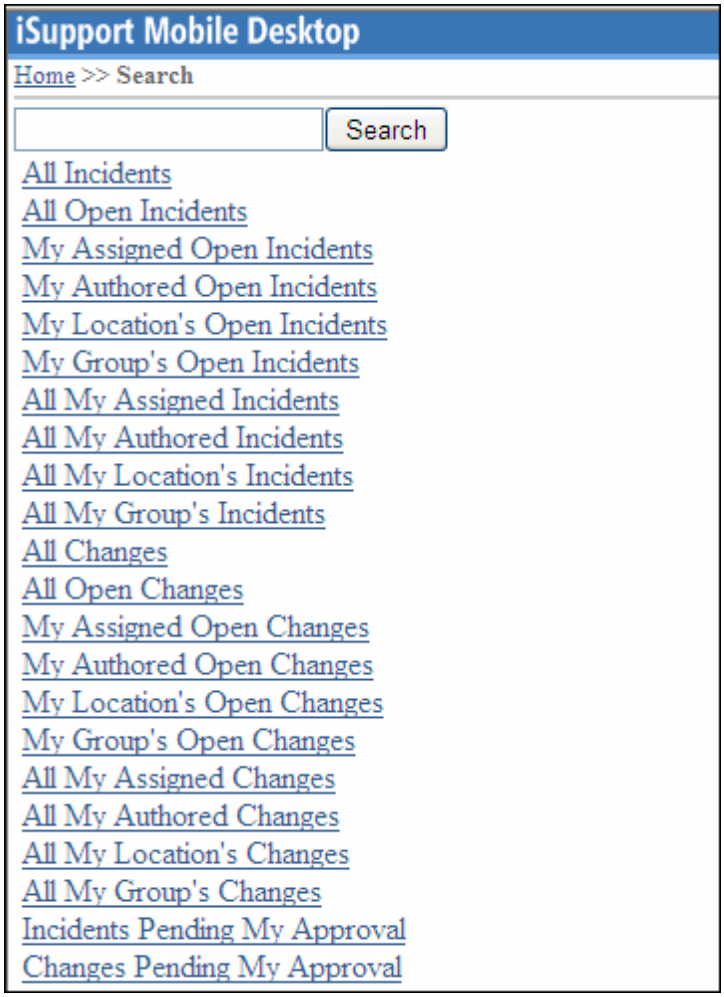
From the Home page, you can perform searches, create new incidents and changes, and set preferences.

Performing Searches

The Search page includes:

- Quick Search for searching incidents and changes that contain a specified value; quick search functionality is only available when JavaScript is available and enabled.

- Predefined searches (which appear based on support representative permissions):



Saving Preferences

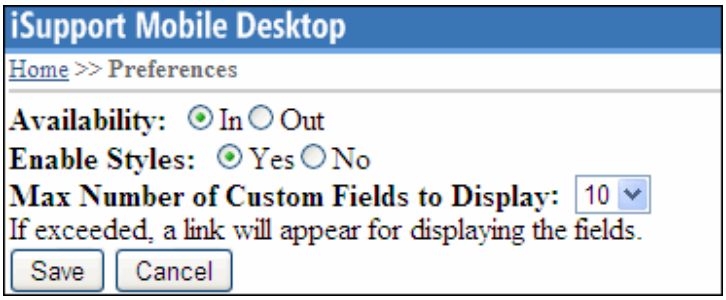
The Preferences page includes the following fields:

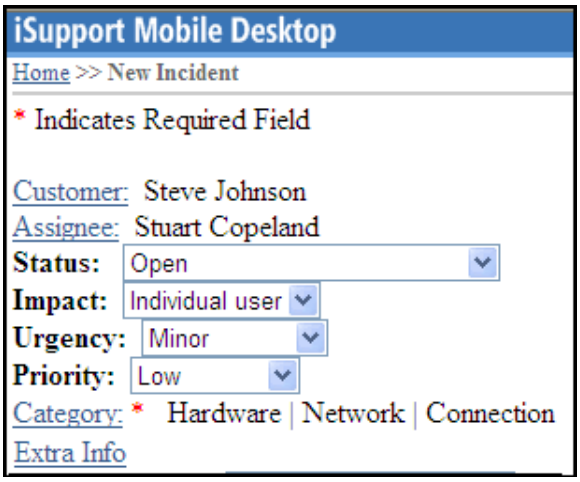
Availability - used for determining the support representatives available for routing.

Enable Styles - when set to No, the style sheet is not included in the HTML. Styles are applied if the browser supports styles.

Max Number of Custom Fields to Display - This field will appear if Java script is enabled; it determines the maximum number of custom fields that will appear in the Mobile Desktop Incident and Change screens. When the selected value is less than the number of custom fields to display for an incident or change, a link will appear with the text specified in the Custom Fields Tab Name field in the Incident Management Configuration and Change Management Configuration screens.

When clicked, the custom fields appear on a separate screen. All functionality associated with custom fields applies to custom fields on the Mobile Rep Desktop.

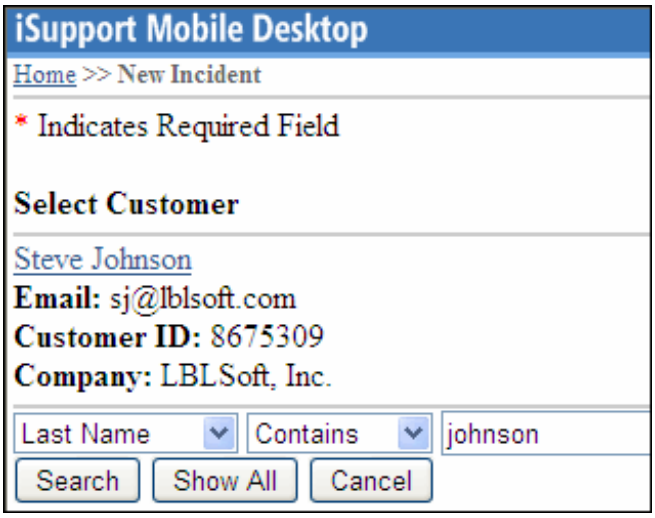




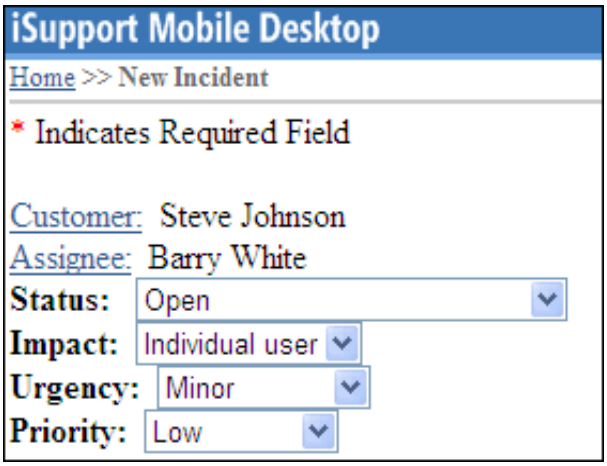
Creating Incidents

The following Incident functionality is available (depending on support representative permissions):

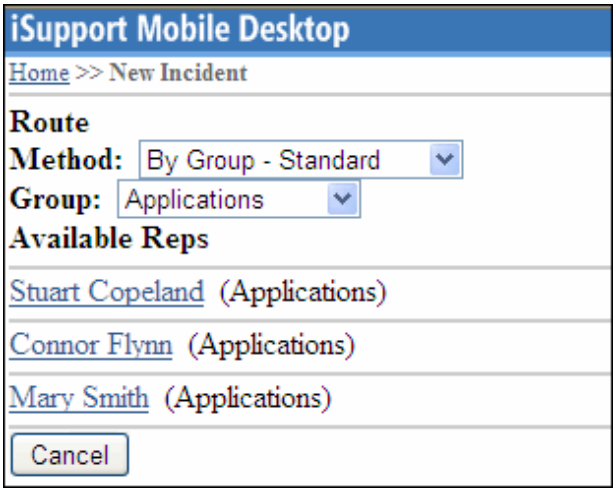
- Select a customer as shown below. If JavaScript is available, a Show All Button will appear for selecting a customer. Without JavaScript, you can enter an asterisk (*) in the Search box and click the Search button. Sorting and paging options will appear if the resulting number is greater than ten.



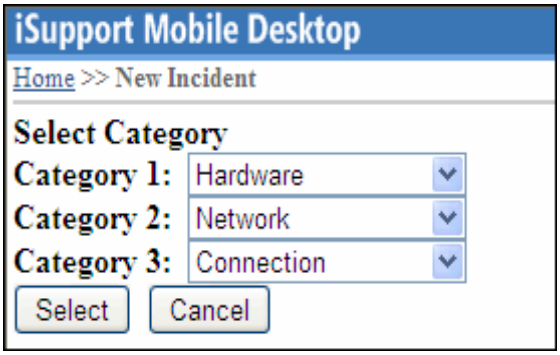
- You can select the impact, urgency, and priority, and status (which can be changed to any status type except Reopened). If JavaScript is not available, a Next button will appear for selecting the urgency and priority.



- If JavaScript is enabled, you can select standard and load-balanced routing by group, location, and name.



- You can select the categorization as shown below. (If JavaScript is not available, a prompt will appear for selecting a category and a Next button will appear for selecting category levels after the first level.)



- You can enter the followup date and short description (if enabled), description, and resolution,

Category: * Hardware | Network | Connection
Server O/S:
Windows NT
Verified Support Contract:
OK to support verified by Manager
Followup Date: 11/19/2009
Short Description:
Connection Error
Description:*
Cannot connect to network.
Resolution:*(if closing)

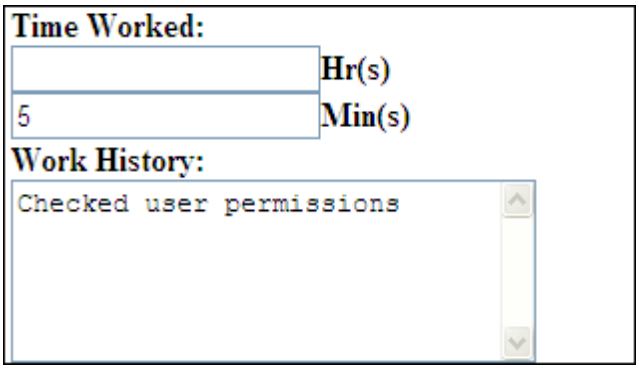
- The maximum number of custom fields that will appear in the Mobile Desktop Incident screen is determined in the Mobile Desktop Preferences screen. See "Creating Changes" on page 55 for more information. If the selected value is less than the number of custom fields to display for an incident, a link will appear with the text specified in the Custom Fields Tab Name field in the Incident Management Configuration screen. When clicked, the custom fields appear on a separate screen as shown below. All functionality associated with custom fields applies to custom fields on the Mobile Rep Desktop.

iSupport Mobile Desktop
Home >> New Incident
* Indicates Required Field

Customer: Steve Johnson
Assignee: Stuart Copeland
Status: Open
Impact: Individual user
Urgency: Minor
Priority: Low
Category: * Hardware | Network | Connection
Extra Info

Home >> New Incident
Server O/S:
Windows NT
Verified Support Contract:
Contract in Renewal
Recommendation:
n/a
Cost:
$100 per hour
Vendor Involvement Needed:
No
Date Issue First Noticed:
3/4
Back

- Use the following fields to record the work history, customer work history, and time worked.



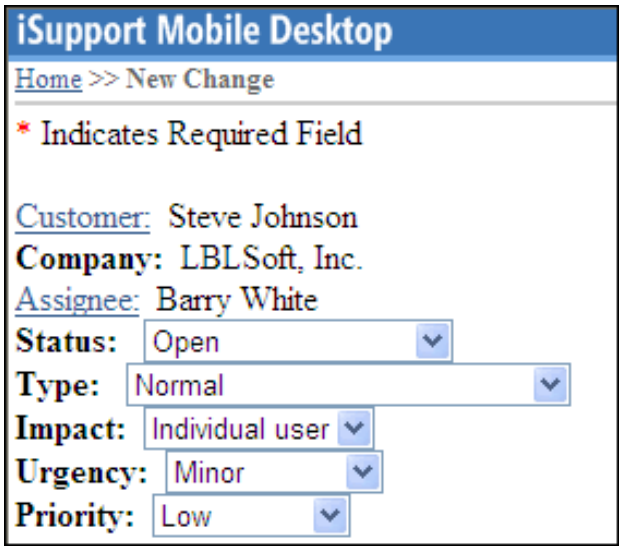
When an incident is saved, the audit history entry “Incident Created From: Mobile Desktop" is added (along with an entry regarding changed fields) and configured notifications are sent. The Incident View page appears for the incident.

Creating Changes

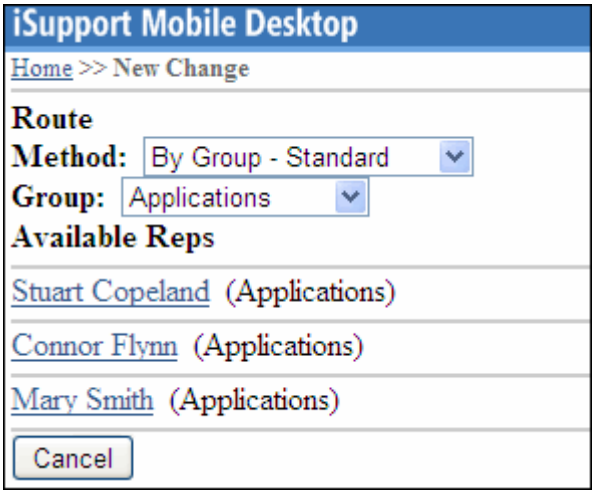
The following Change functionality is available (depending on support representative permissions):

- Select a customer as shown below. If JavaScript is available, a Show All Button will appear for selecting a customer. Without JavaScript, you can enter an asterisk (*) in the Search box and click the Search button. Sorting and paging options will appear if the resulting number is greater than ten.

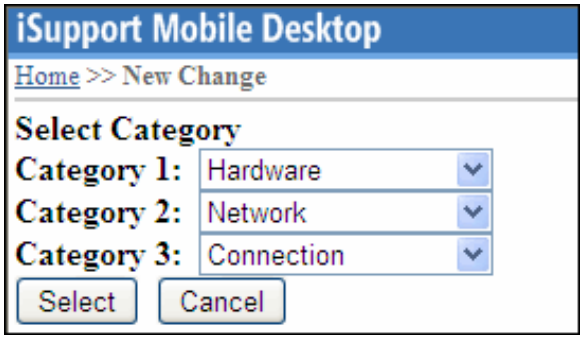
- You can select the status, type, impact, urgency, and priority. If JavaScript is not available, a Next button will appear for selecting the urgency and priority. After you save the change, you cannot modify the selection in the Change Type field.



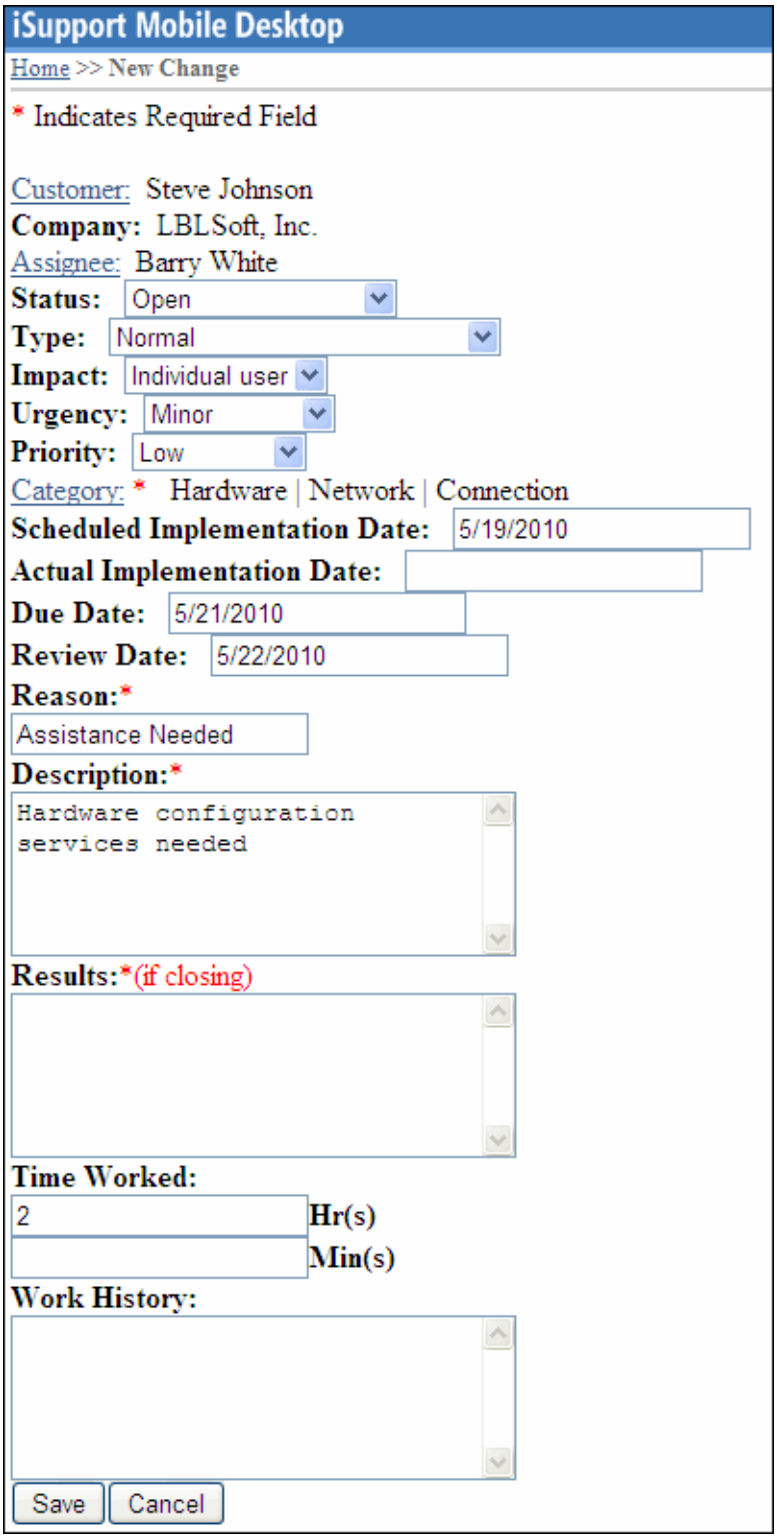
- If JavaScript is enabled, you can select standard and load-balanced routing by group, location, and name.



- You can select the categorization as shown below. (If JavaScript is not available, a prompt will appear for selecting a category and a Next button will appear for selecting category levels after the first level.)

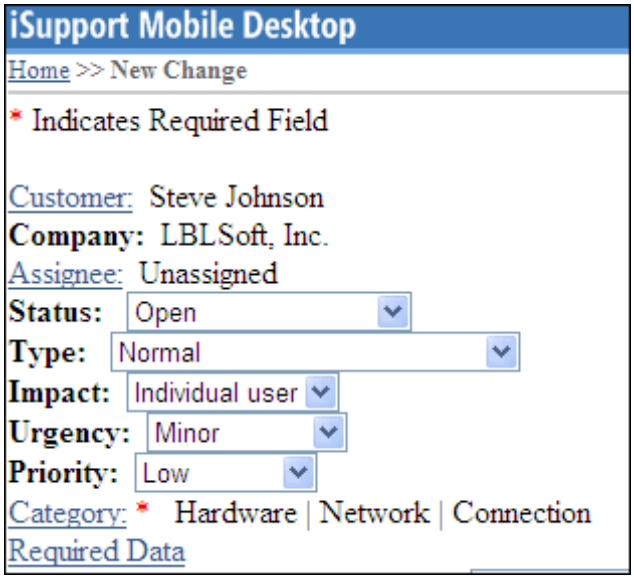


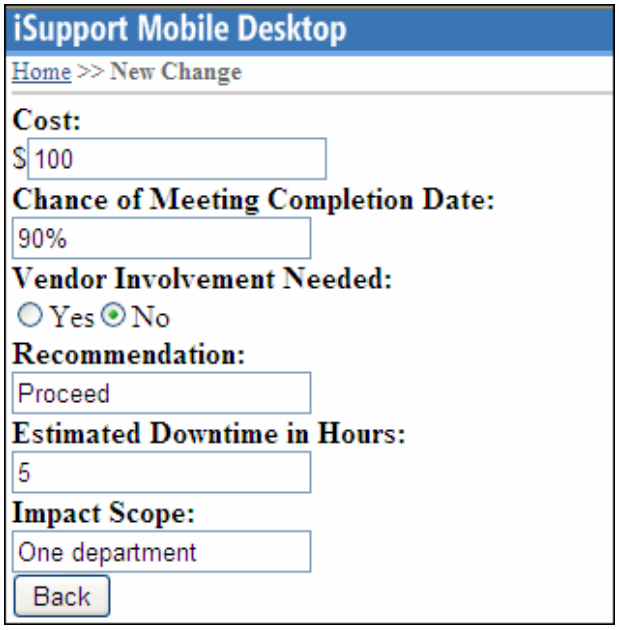
- You can enter the applicable dates, reason, description, results, time worked, and work history for the change.



- The maximum number of custom fields that will appear in the Mobile Desktop Change screen is determined in the Mobile Desktop Preferences screen. See "Creating Changes" on page 55 for more information. If the selected value is less than the number of custom fields to display

for a change, a link will appear with the text specified in the Custom Fields Tab Name field in the Change Management Configuration screen. When clicked, the custom fields appear on a separate screen as shown below. All functionality associated with custom fields applies to custom fields on the Mobile Rep Desktop.

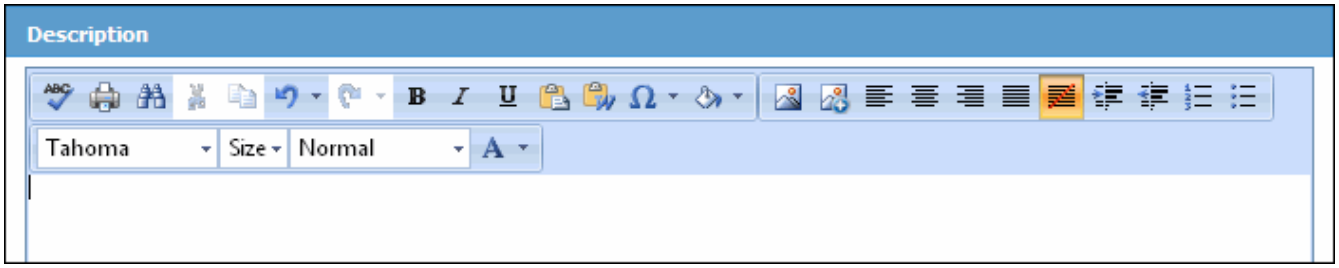




When a change is saved, the audit history entry "Change Created From: Mobile Desktop" is added (along with an entry regarding changed fields) and configured notifications are sent. The Change View page appears for the change.

Using the Text Editor Toolbar

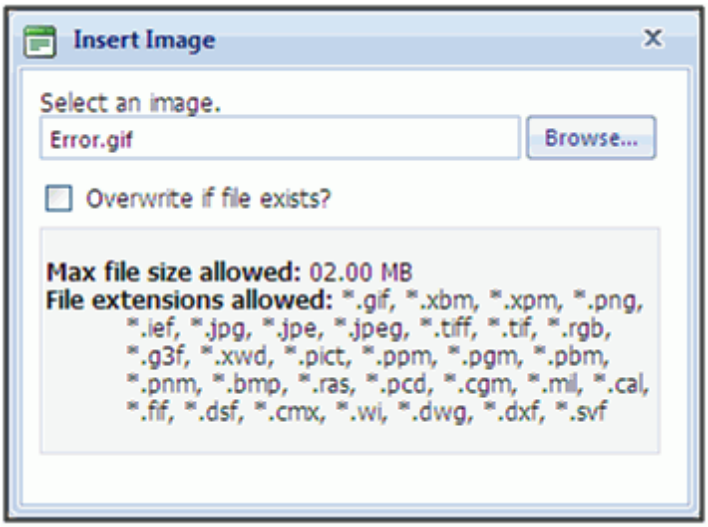
Use the HTML-based text editor toolbar to manipulate text and images in an entry field. Tooltips with keyboard shortcuts display as you hover over each icon with the mouse. When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field in fields with the text editor; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen. See "Setting Preferences for the Desktop" on page 106 for more information.



The toolbar options are similar to those in Microsoft Word, with the following exceptions:

- If you have formatted content from Microsoft Word on the clipboard and click the Paste icon, a prompt will appear with the option of clearing the Microsoft Word formatting.

- You can use the Paste From Word option to retain Microsoft Word formatting (but all unnecessary Microsoft Office related tags will be cleared).
- The Insert Symbol icon displays a dropdown list of special characters for insertion.
- You can use the Image Upload icon to paste saved images up to 2 MB. The following will appear; click the Browse button and select the image. The image will be inserted immediately.

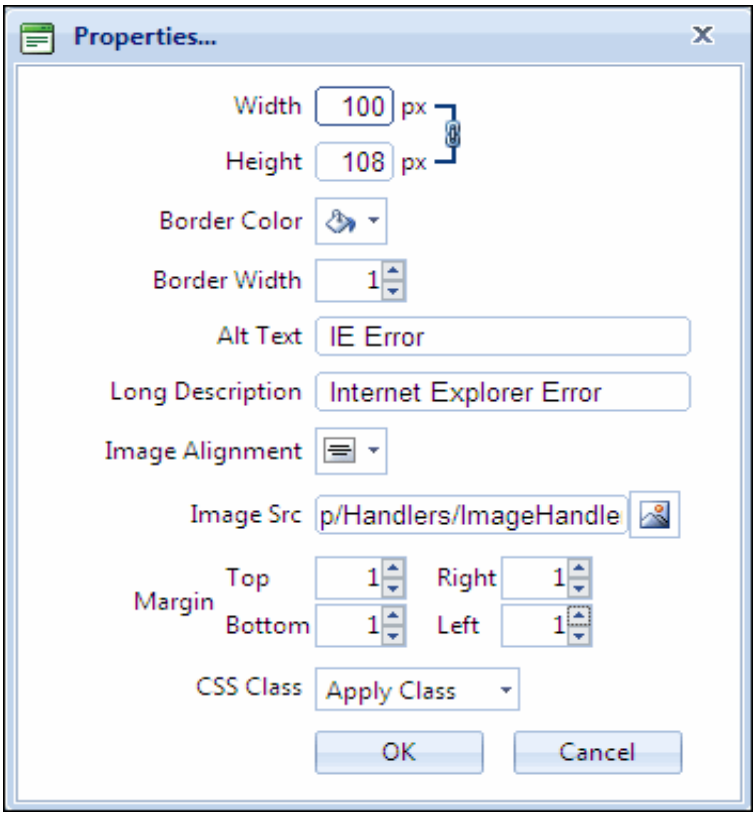


The image will be saved in a folder with the name of the support representative inserting the image. Access to images can be controlled via functionality in the Configuration module.

- You can use the Image Manager icon to create a new folder for images, upload saved screenshots and other images up to 2 MB, and access the Image Editor to manipulate images. See "Using the Image Manager" on page 62.

Setting Image Properties

After an image is inserted, you can right-click on it and select Properties to create a border, enter alternate text and a description, and other options.

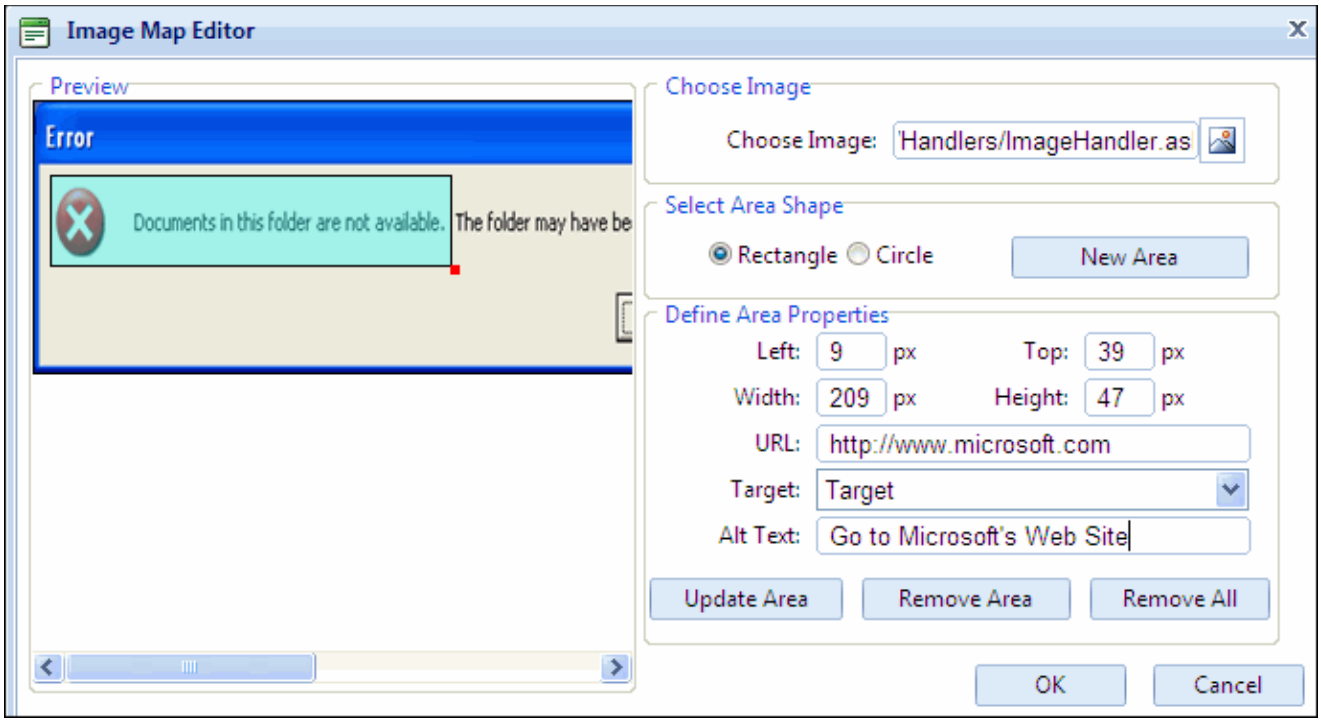


Field	Description
Width Height	Enter the width and/or height for display of the image. (The actual image file will not be changed.) Use the Constrain icon to lock and unlock the aspect ratio: Locks the aspect ratio Unlocks the aspect ratio
Border Color	Select the color of the border surrounding the image.
Border Width	Use the + and - symbols to select the thickness of the border surrounding the image. Select 0 to remove the border.
Image Alt Text	Enter text to appear as you hover over the image with your mouse. It will also appear if the image does not display (for example, due to a server connection problem).
Long Description	Enter a description of the graphic. This is for reference only.
Image Alignment	Select the alignment of the image: top, bottom, left, center, or right.
Image Src	Enter the path to the image file on the web server or click the ... icon to display the Image Manager dialog.

Field	Description
Margin	Use the + and - symbols to select the amount of space around the image.

Using the Image Map Editor

You can right-click on an image to access the Image Map Editor for creating an area on which, if a user clicks on it, will take the user to a specified URL. Note that image maps are only active on non-editable fields such as those on knowledge entries and closed incidents.



Select the area shape, rectangle or circle, and then click the **New Area** button.

Drag your mouse to create an area on the image. The dimensions of the area populate the **Left**, **Width**, **Top**, and **Height** fields; you can adjust it if necessary. If you later decide you don't want the image map area, you can use the **Remove Area** and **Remove All** buttons to remove one or all of the areas you have defined.

In the **URL** field, enter the URL to which the user will be directed.

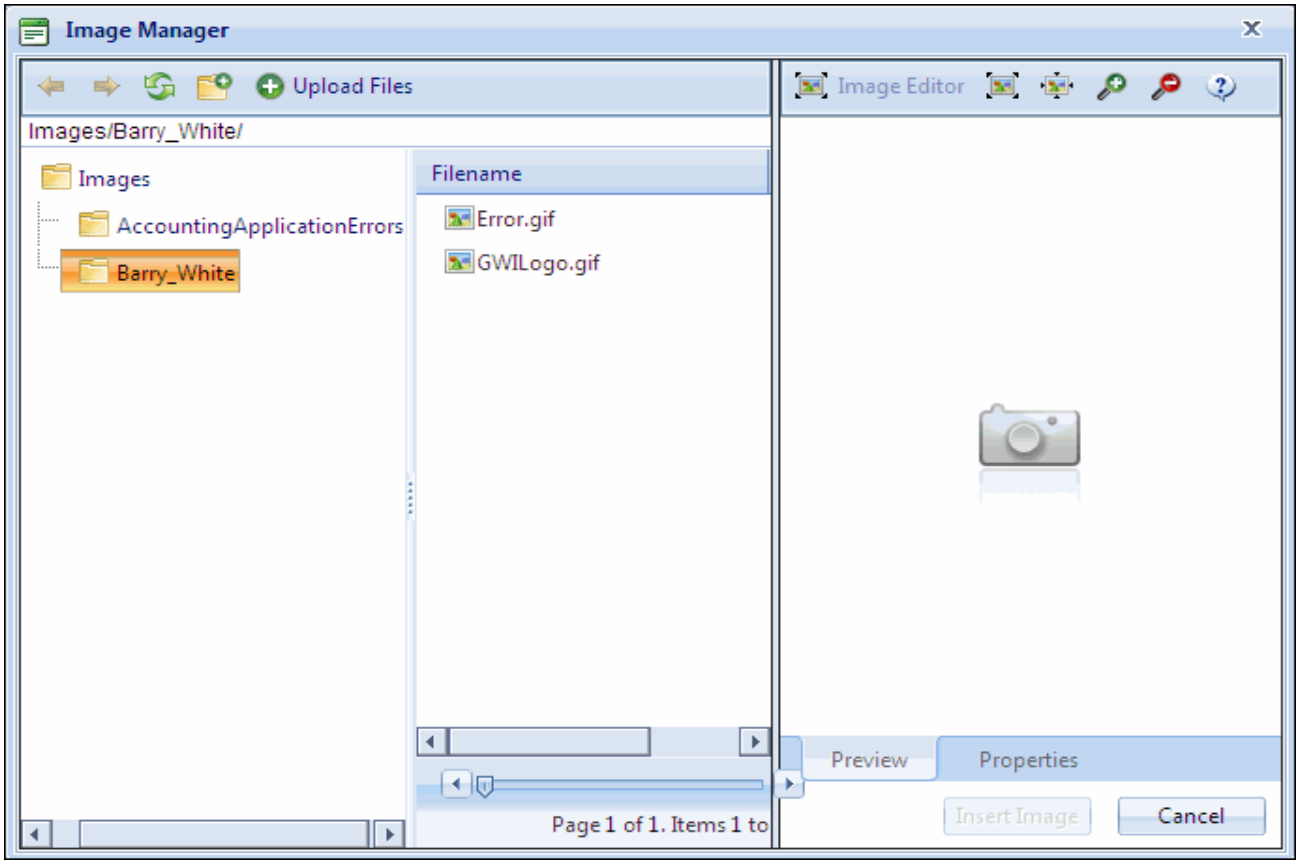
In the **Target** field, select how to display the web page to which the URL will appear.

In the **Comment** field, enter a comment to appear when the mouse hovers over the area.

When finished, click OK.

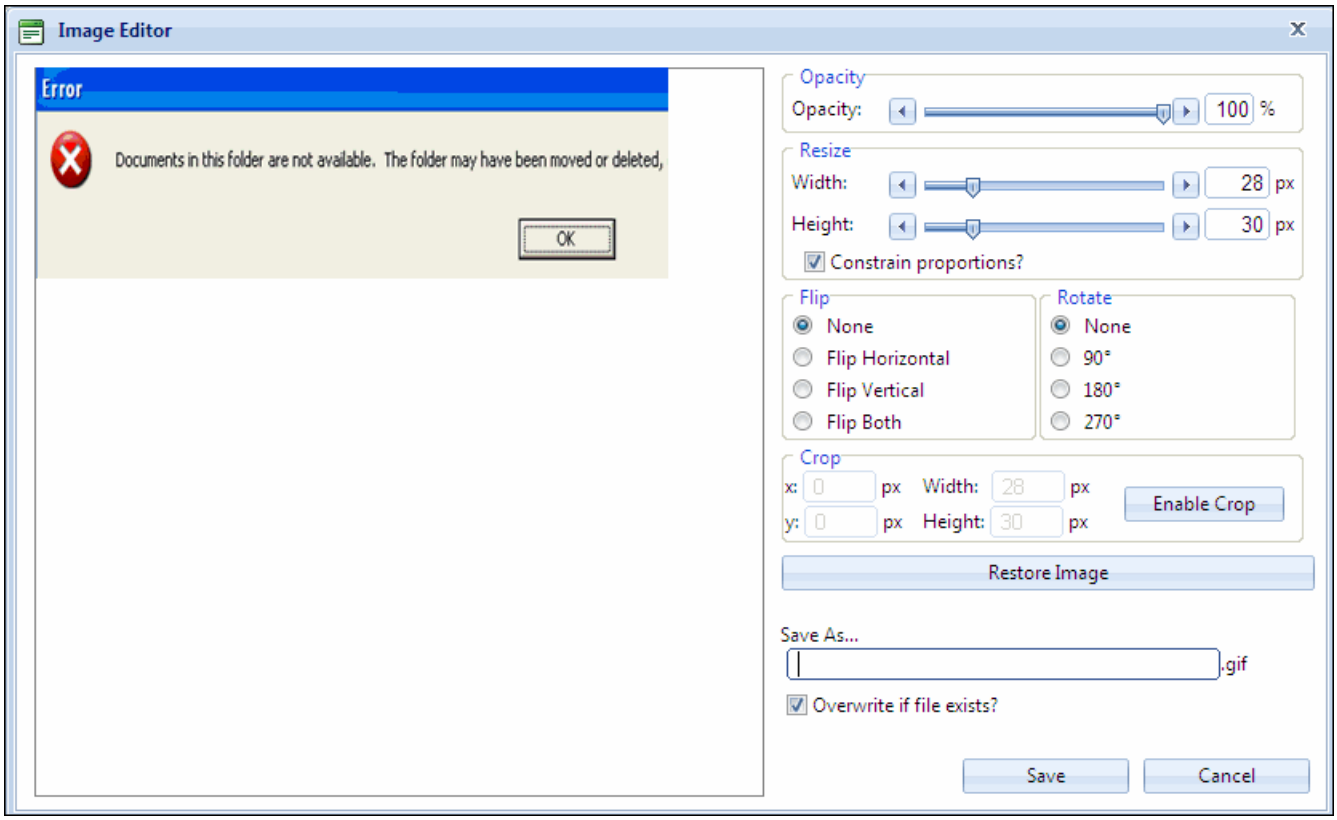
Using the Image Manager

You can use the Image Manager to create a new folder for images, upload saved screenshots and other images up to 2 MB, and access the Image Editor to manipulate images. Images are saved in the database and associated with directories on which group access restrictions can be enabled; this is done via the Administration | Image Management option in the Configuration module. (Note that images in inbound email are stored as attachments on the Correspondence record.)



Using the Image Editor

Use the Image Editor to resize, flip, rotate, crop, or change the opacity of an image.

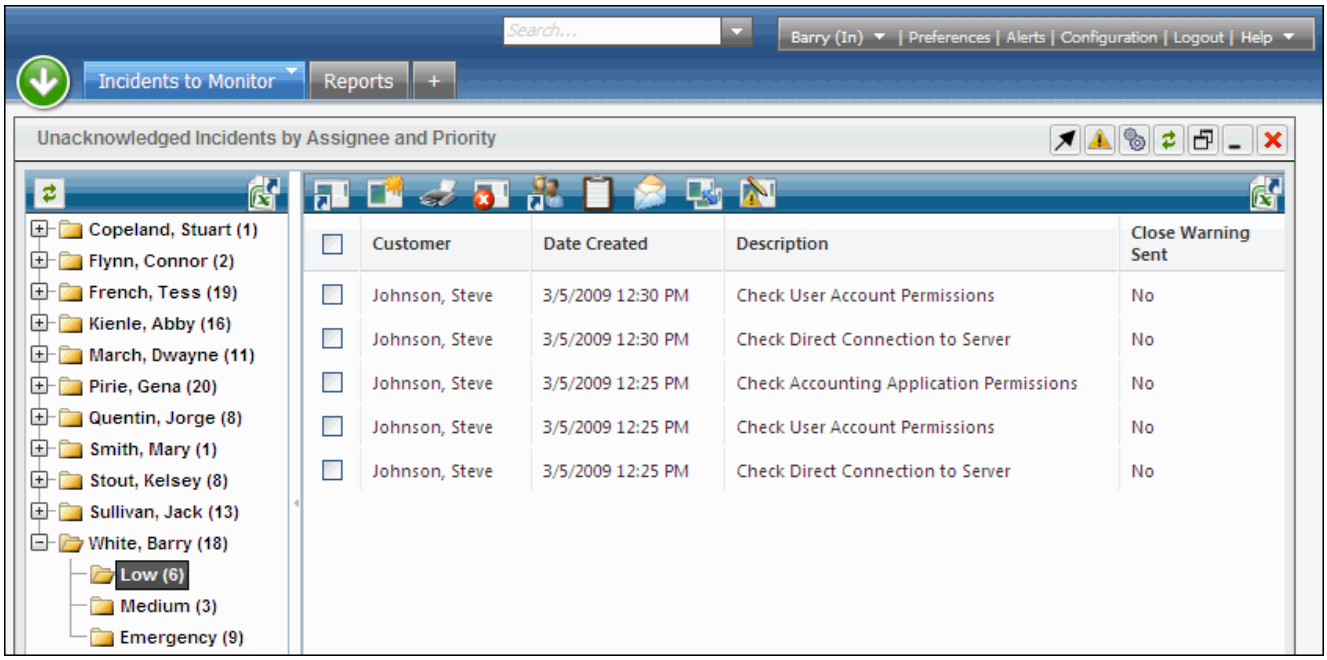


Field	Description
Opacity	Use the slider bar, icons, or entry fields to change the transparency of the image.
Resize Width Height	Use the slider bar, icons, or entry fields to change the size of the image. Select the Constrain Proportions checkbox to lock the proportion ratio.
Flip	Select the direction to turn the image: horizontally, vertically, or both.
Rotate	Select the degree in which to turn the image.
Crop	Select the Enable Crop button to display a red resizable box around the image, and then use your mouse or enter the number of pixels for the dimensions in which an area should be cut from the image.
Save As	Enter a name for the changed image. Select the Overwrite If File Exists checkbox to overwrite the file if your entry is the same as an existing file.

2 Using the Desktop

Overview

The Desktop provides access to all iSupport functionality.



You can:

- Click the **action** **menu icon** to access to all of iSupport's entry screens as well as the viewing and charting options. See "Using the Action Menu" on page 67 for more information.
- The **Home and Views tabs** are included by default; you can rename tabs, add and name tabs and include content in varying widths, set up tabs to display on the Desktops of other support representatives, and save tabs for use later. See "Working With Tabs" on page 71 for more information. See "Using Views" on page 67 for information on using icons and functions related to iSupport data views.
- Access the **View Designer** to create views of iSupport data for display on the Desktop. See "Using the View Designer" on page 75 for more information.
- Access the **Chart Designer** and manage access to charts. See "Using the Chart Designer" on page 89 for more information.

- Create **alerts** that will appear at the top of the Desktop tabs when a view field reaches a certain threshold. For example, you can configure an alert to appear when a certain number of Emergency priority incidents has been reached. The alert can also be sent via email and page. See "Creating Alerts" on page 96 for more information.
- Use the **Search** dropdown to perform a literal search for a character string within all iSupport data. If only one record matches the search, the record will open automatically when selected. See "Performing Searches" on page 102 for more information.
- Display a **Reports tab** for creating and viewing SQL reports. See "Creating and Viewing SQL Reports" on page 112 for more information.
- Display a **Configuration tab** for configuring all iSupport functionality.
- Use the **function bar** in the upper right corner for setting preferences and availability, creating alerts, accessing the Configuration module, logging out, and accessing documentation. See "Using Options on the Function Bar" on page 103 for more information.
- Add a **customized toolbar** for commonly used actions. See "Configuring a Create Toolbar" on page 108.

If permissions are enabled during configuration, you may not be able to:
- View reports, active or archived incidents, assets, companies, surveys, or Customer Profile records
- Create or delete incidents, assets, companies, or Customer Profile records

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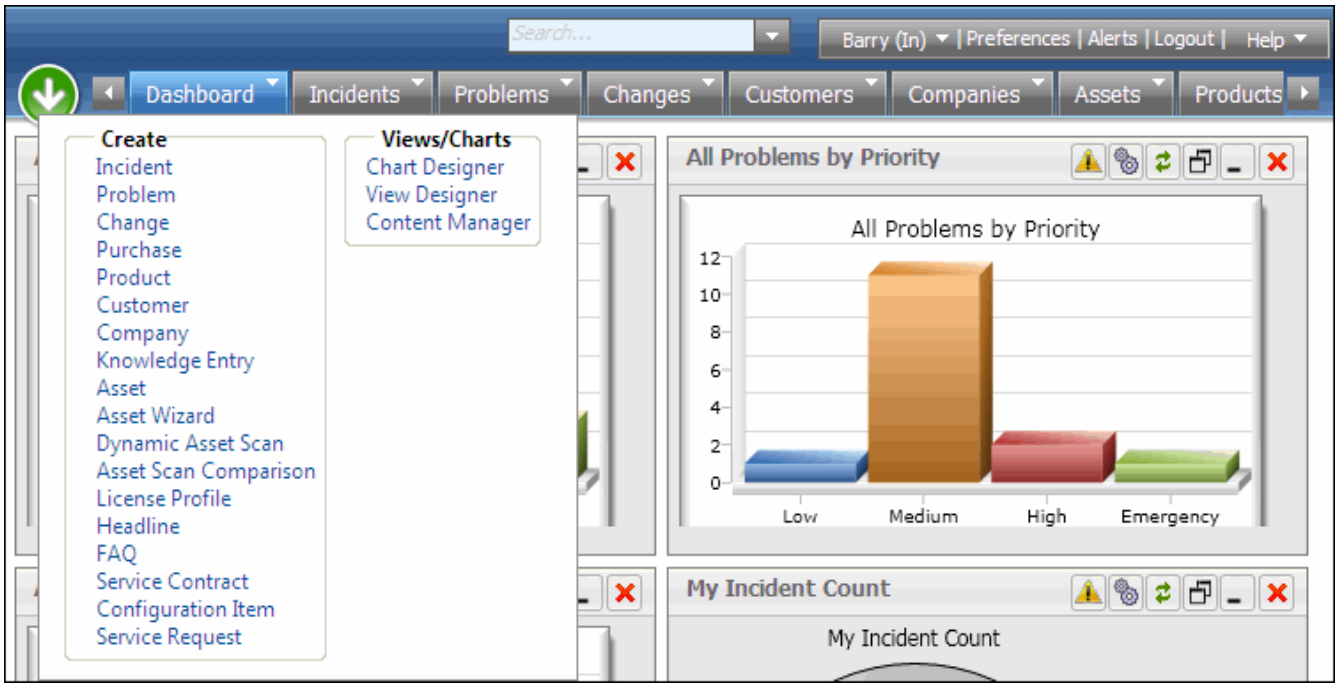
Using the Action Menu

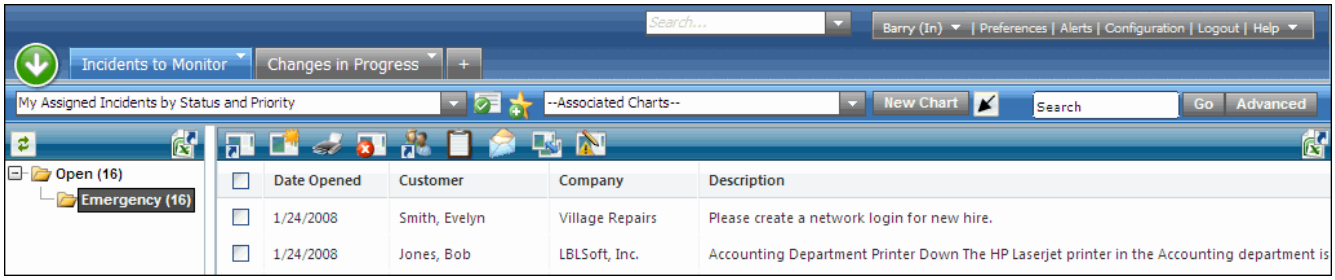
Click the action menu icon to access to all of iSupport's entry screens as well as the viewing and charting options.



The Problem, Purchase, Change, and Configuration Item entries only appear if you have the Service Desk edition. Functionality may not appear for support representatives if permissions are enabled in the Configuration module.

Using Views

Use the view area to display and open incidents, problems and changes (if enabled), customers, knowledge entries, frequently asked questions, survey responses, and asset records. Use the View dropdown to select the view to display.

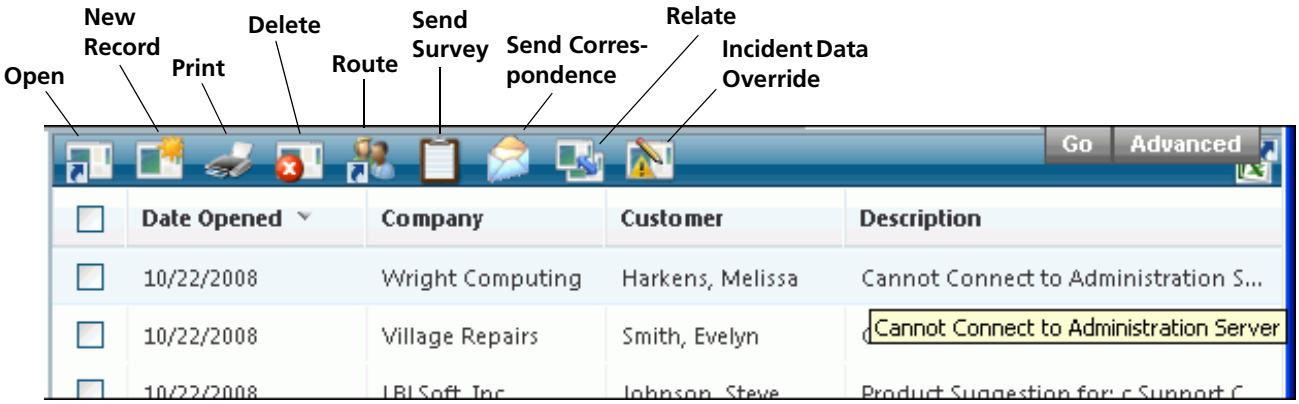


The following options appear when the view is maximized:

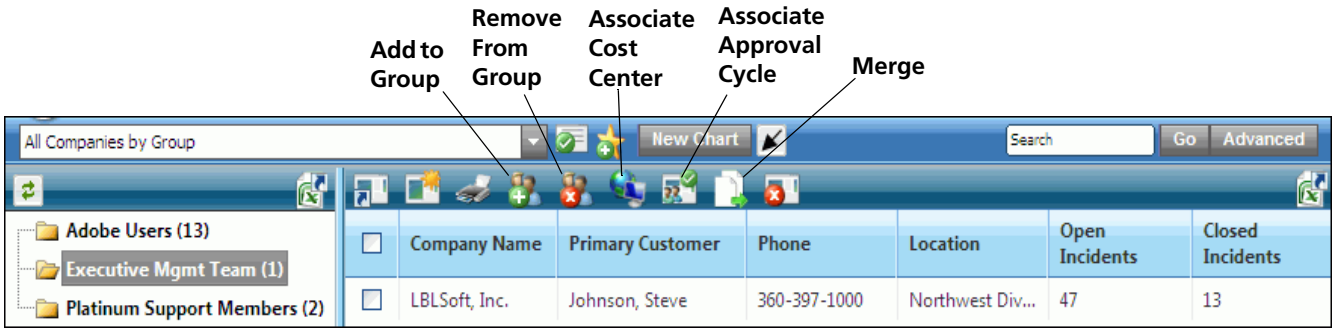
- Use the **Make Default** icon to change the default view to the current view (applies to maximized content only).
- Use the **Add to Favorites** icon to add the current view to your Favorite Views list.

- Use the **Associated Chart** menu to display any chart associated with the view in a new window. The **New Chart** button displays the Chart Designer.
- Use the **Minimize in Tab** icon to display the view in a frame instead of maximized in the tab.
- Use the **Search** field to perform a literal case-insensitive search for a character string within all data displayed in the current view. Place the cursor in the Search field, enter the character string, and click Go. You can search for an incident number in an incident view, even if it doesn't exist in a displayed column.

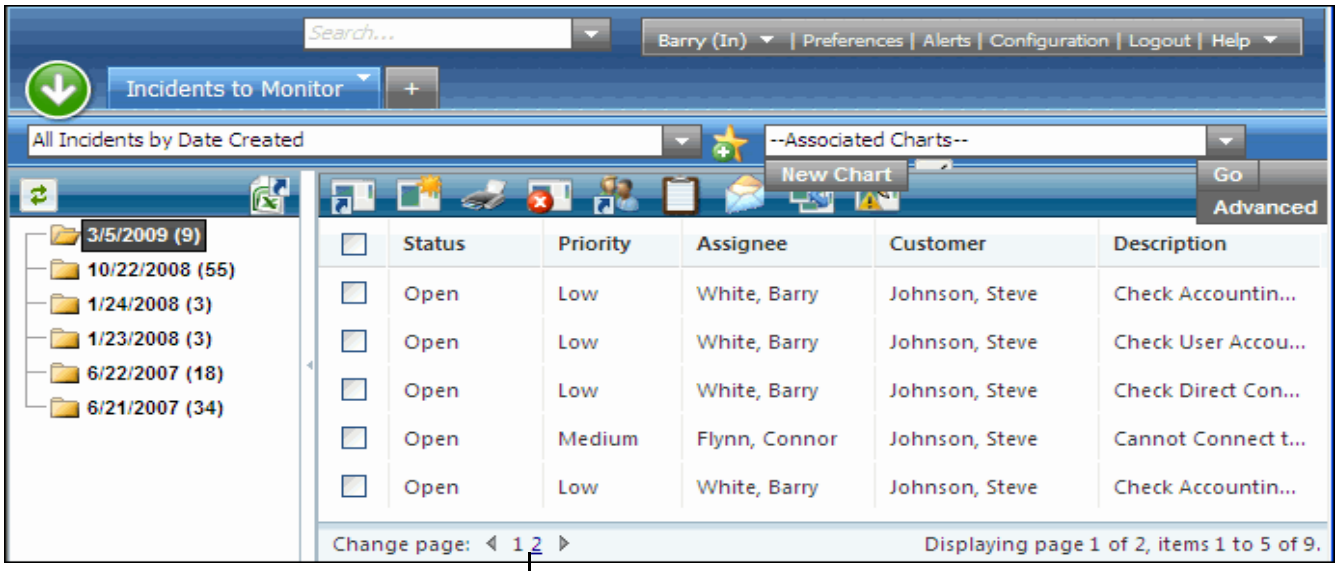
  The **Advanced** link on the Desktop enables you to define up to three sets of criteria for searching data in the view. In the Advanced Search dialog, select a field and a comparison method and enter the text string. Click the Add link to enter another set of criteria. When finished, click the Search button. After the results display, you can click the Cancel Search icon to clear the search results.
- Views do not refresh automatically when items are created, changed, or deleted. To refresh a view, click on the **Refresh** icon.
- You can open any item in a view by clicking on it, and you can click on a column heading to sort it in ascending/descending order.
- Use the icons in the view column area to print, delete, and open multiple records. You can also send surveys, add to customer and asset groups, and relate and route multiple records. If a field includes an ellipsis (...), the full text will appear when you hover over it with your mouse.



The icons that appear relate to the view selected; for example, Customer and Company views may include the following icons (depending on enabled functionality and permissions).



- You can press Ctrl+N to access the Incident screen from the Desktop.
- You can specify the number of entries per page in the Preferences screen; when the number of entries exceeds the specified number of view entries per page, a set of view paging links appear at the bottom of the entries as shown below:



View paging links

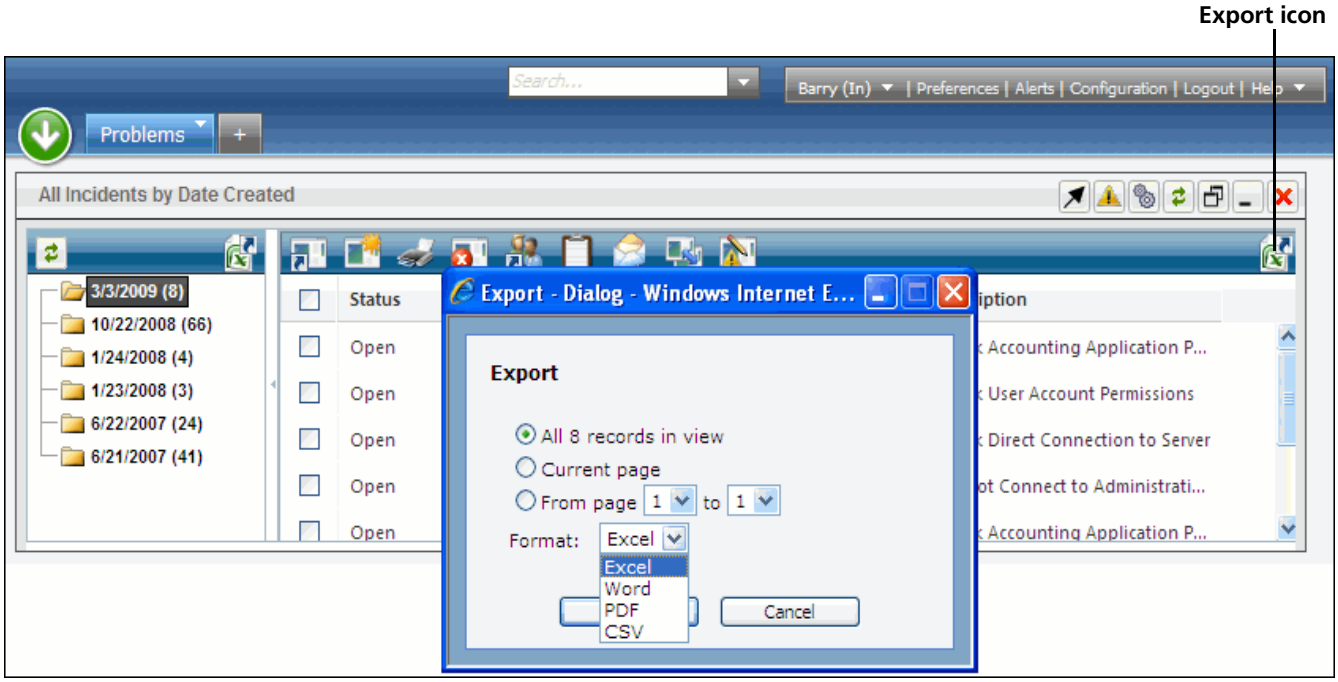
You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page
- Press Alt < to jump back to the first page

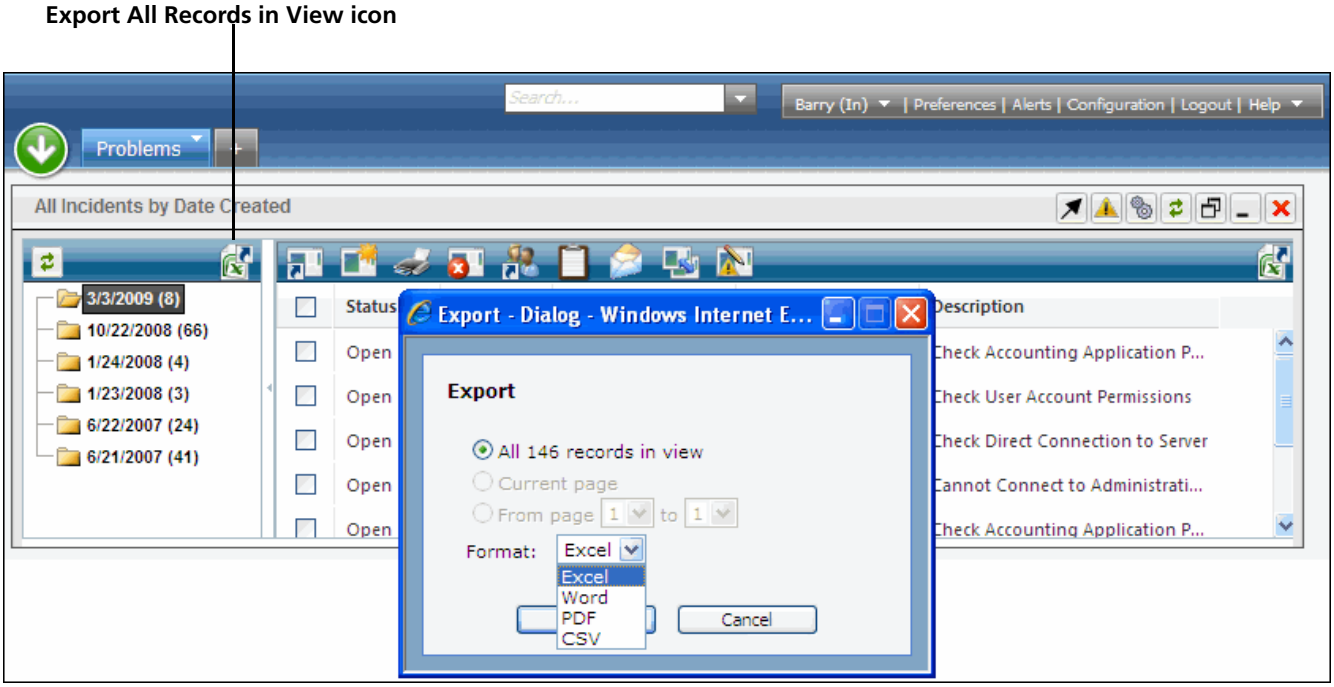
Exporting View Data

The Export View icon enables you to export view data in Microsoft® Excel (*.xls) format, Microsoft® Word (*.doc) format, Portable Document Format (*.pdf), or Comma Separated Value Format (*.csv). Comma Separated Value Format is usable with Microsoft Excel and other third party tools.

Use the Export icon in the right frame to export the data represented in the right frame; you'll be able to export all records at once, the current page, or a range of pages, all based on your current view, search, and sorting criteria.



Use the Export All Records in View icon in the left categorized frame to export all records in the view, preserving any search results.



A warning message may appear if using Microsoft® Excel® 2007. This occurs because iSupport exports the file as HTML and places an .xls extension on the file so users can view the file in Microsoft® Internet Explorer® if needed. Click Yes in the warning dialog to continue the export.

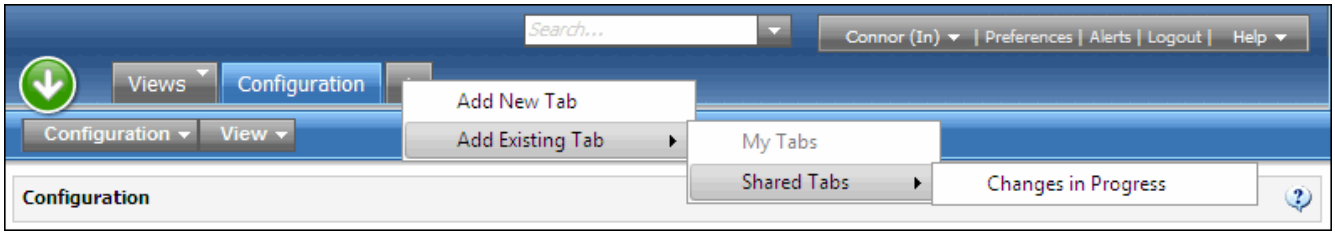
If you export more than Microsoft® Excel®'s limitation of 65,536 records, you'll have the option of exporting the data in comma-separated value (CSV) format or exporting only up to the limit of 65,536 records.

Working With Tabs

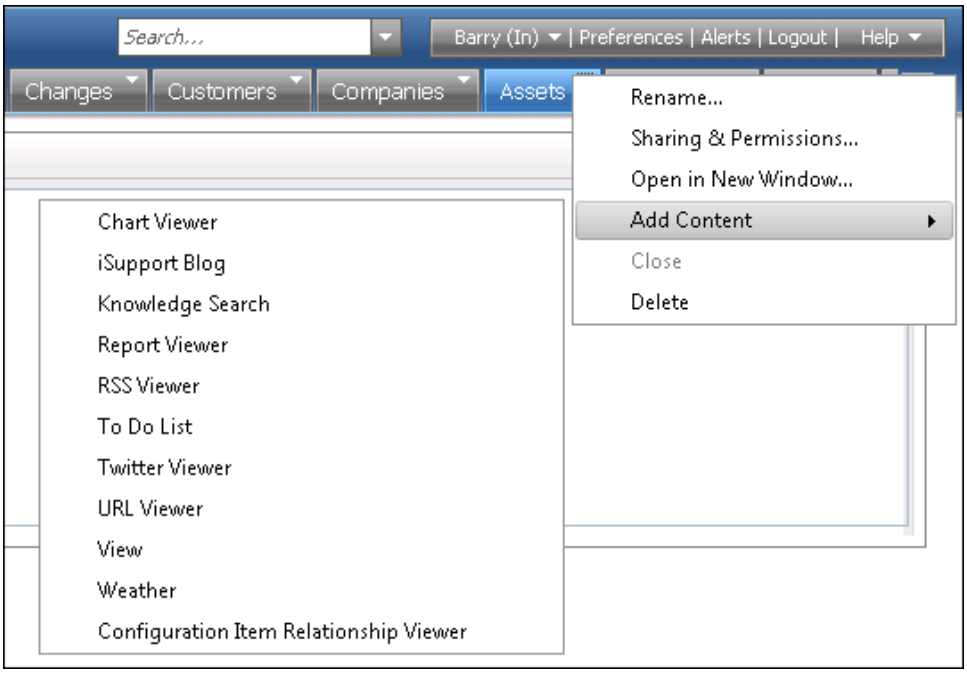
You can add charts, URLs, RSS feeds, reports, weather, and views of iSupport data to Desktop tabs. You can also add a To Do list and include a field for searching for knowledge entries. The content can display in frames of varying sizes or maximized in the tab. You can save tabs for use later, and share tabs with other support representatives.

Adding Tabs

To add a new or existing tab, click the Add Tab icon on the Desktop. Select Add New Tab to create a new tab; select Add Existing Tab | Shared Tabs to add a tab that has been created with Shared access (enabling others to add it to their Desktop).



The tab appears on the Desktop; use the tab dropdown icon display a menu for renaming, sharing, opening in a new window, adding content, closing, and deleting the tab.



Adding Tab Content

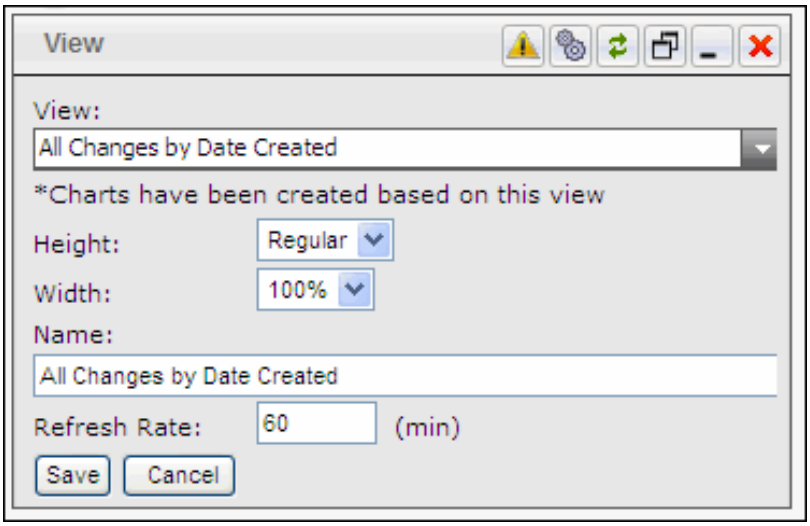
To add content to a tab, select Add Content on the tab menu. You can add the following:

- **Chart Viewer** - Displays private or shared charts (predefined or created via the Chart Designer). See "Using the Chart Designer" on page 89 for information on creating charts.
- **iSupport Blog** - The iSupport Blog enables you to view and comment on the iSupport and iSupport Marketing blogs.
- **Knowledge Search** - Displays the Knowledge Search field.
- **Report Viewer** - Displays a specified SQL report in the iSupport/Reports folder on your report server. Note that due to a limitation in Microsoft's RSClientPrint control, iSupport's SQL Report Viewer functionality is only supported with Microsoft® Internet Explorer®. Mozilla® Firefox®, GoogleTM Chrome, and Apple® Safari® can be used to view a report, but certain reporting features are not supported with those browsers.
- **RSS Viewer** - Displays an RSS 2.0 feed. When you specify the RSS Feed URL, be sure to include "http://" in your entry.
- **To Do List** - Enables you to create entries with a deadline and check off items when finished.
- **Twitter Viewer** - Displays Twitter entries for a valid Twitter account.
- **URL Viewer** - Displays a web page. When you specify the URL in the Preferences screen, be sure to include "http://" in your entry.
- **View** - Displays iSupport's predefined views and views created via the View Designer. See "Using the View Designer" on page 75 for information on creating views. If you display a

different view on a tab, you can click the Make Default icon to designate the current view as the content for the tab.

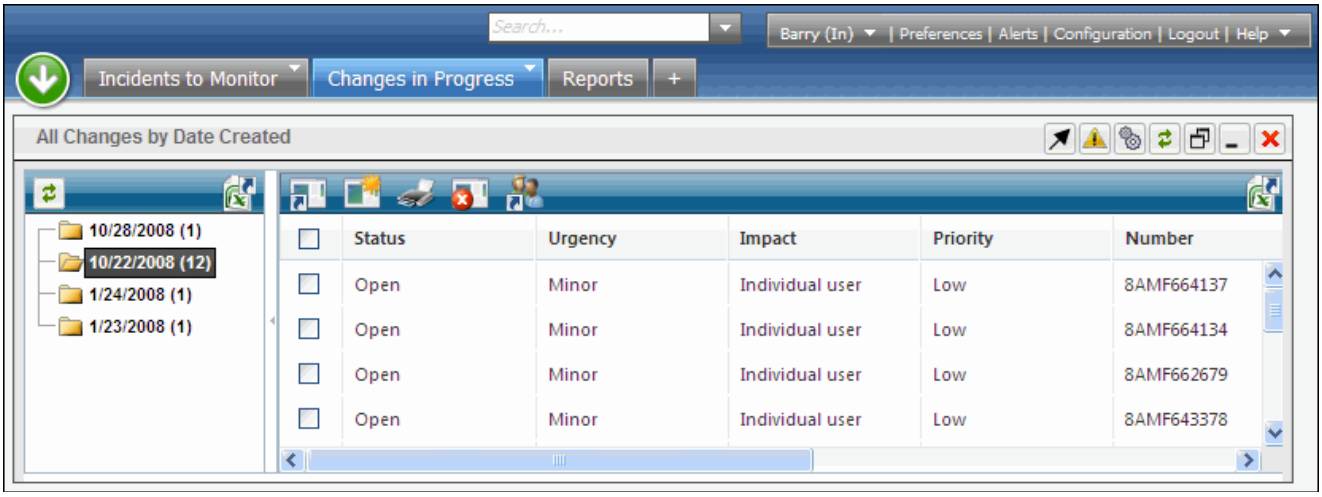
- **Weather** - Displays the weather report from www.nws.noaa.gov.
- **Configuration Item Relationship Viewer** - Graphically displays the configuration items related to a specified configuration item.

After creating the tab, the fields for configuring the content will appear. The Height, Width, Display, Name, and Refresh Rate fields will appear with every component:



Field	Description
Height	Select the height of the component frame: Regular or Tall. Select Tall for content such as vertical thermometer charts.
Width	Select the percentage for the width of the component: 16%, 25%, 30%, 50%, 70%, or 100% of the Desktop window.
Name	Enter the name to appear at the top of the frame.
Refresh Rate	Enter the number of minutes in the interval for the frame content to automatically refresh.

A feature-specific field will also appear; for example, if you selected View, you'll be able to select the view. Click the Save button. The content appears in a frame as shown in the example below:



Using Frame Icons

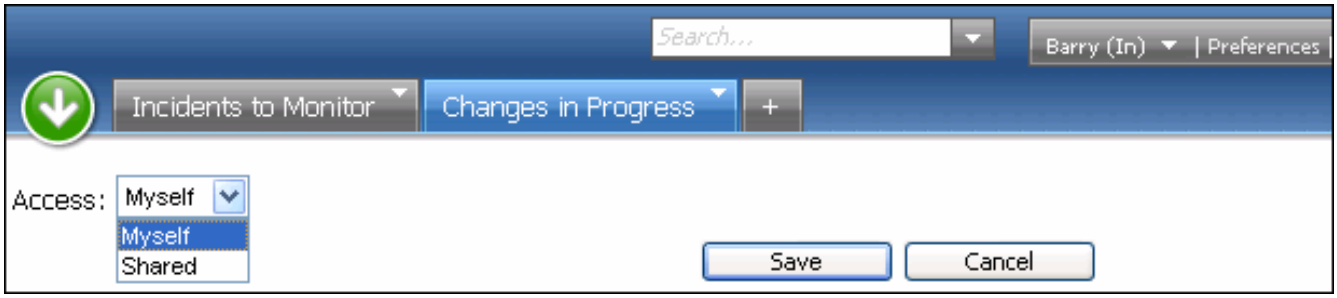
After frame content has been created, you can do the following:

- Use the Maximize in Tab icon to display the content in the entire tab. After the content is maximized, you can click the Minimize in Tab icon to revert back to the original frame size.
- Use the Alert icon to create an alert that will appear at the top of the Desktop tabs when a view field reaches a certain threshold. (For example, you can configure an alert to appear when a certain number of Emergency priority incidents has been reached.) The alert can also be sent via email and page. See "Creating Alerts" on page 96 for more information.
- Use the Configure icon to make changes to the frame height, width, name, refresh rate, and content.
- Use the Refresh icon to refresh the content on the tab.
- Use the New Window icon to display the content in a new browser window.
- Use the Minimize icon to minimize the content and display only the title bar of the frame.
- Click the Delete icon to delete frame from the tab.

After adding a frame and saving, if the frame is not maximized in the window, you can reposition the frame by clicking on the frame title bar and dragging and dropping it to another position.

Specifying Tab Access

Use the Sharing and Permissions option the tab menu to control tab access.



In the Access field:

- Select Myself to keep a tab private so only you can add it to your Desktop.
- Select Shared to make the tab available so that other support representatives can add it to their Desktop. Note: a tab set as your default cannot be designated as a shared tab.

Tab access (including restricting access by group) may be further controlled via options in the Configuration module.

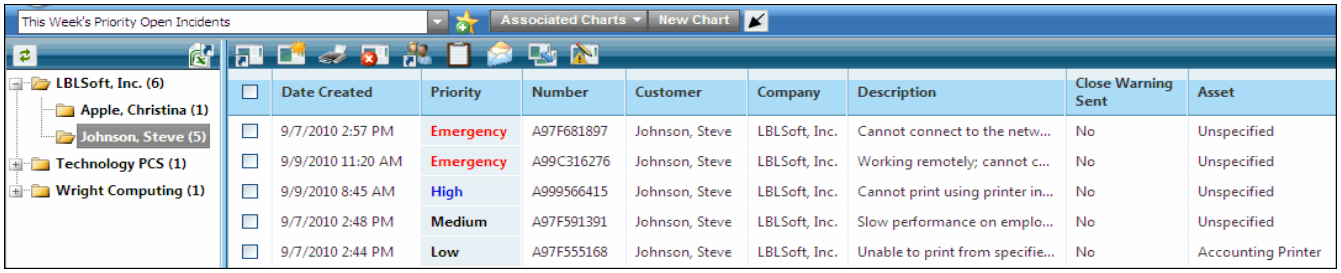
Using the View Designer

Use iSupport's View Designer to create a new view or make a copy of an existing view and modify it to create a new view of iSupport data for display on the Desktop. (Note, however, that you cannot modify shared views included by default in iSupport.) You can utilize iSupport's predefined data fields or any custom SQL views/queries that you have created.

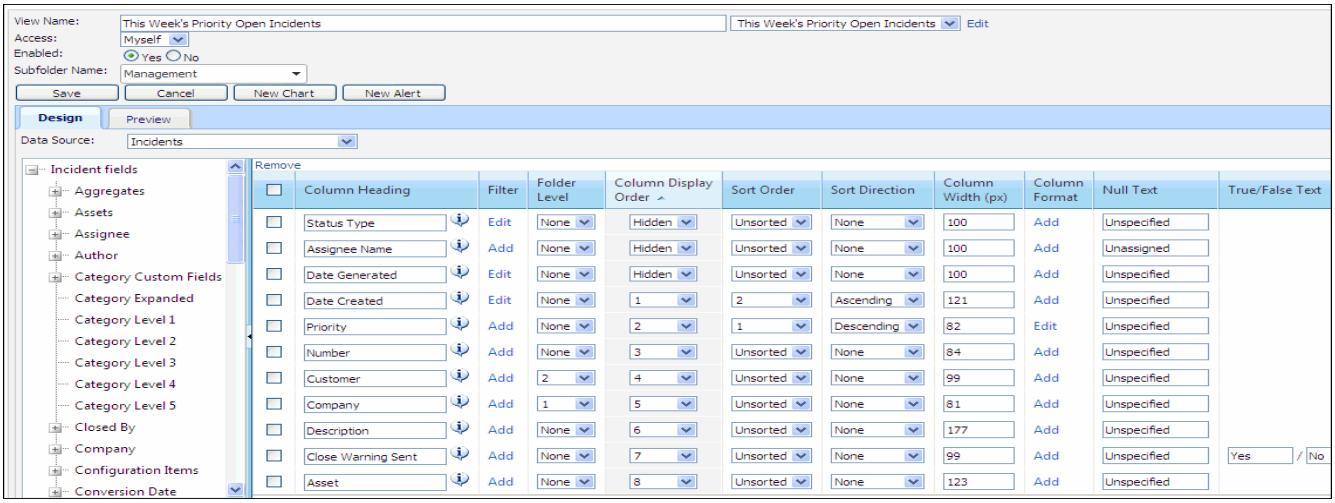
You can access the View Designer via the View Designer option on the Desktop action menu, the Edit button on a Desktop tab content frame, and the Edit and Copy links after selecting a view in the Content Manager.

To make a copy of an existing view, select Content Manager on the Desktop action menu, select the view on which to base your customized view, and select Copy.

The following sections reference creation of a custom view named This Week's Priority Open Incidents:



An example of view settings in the View Designer is shown below.



Naming the View and Specifying Access

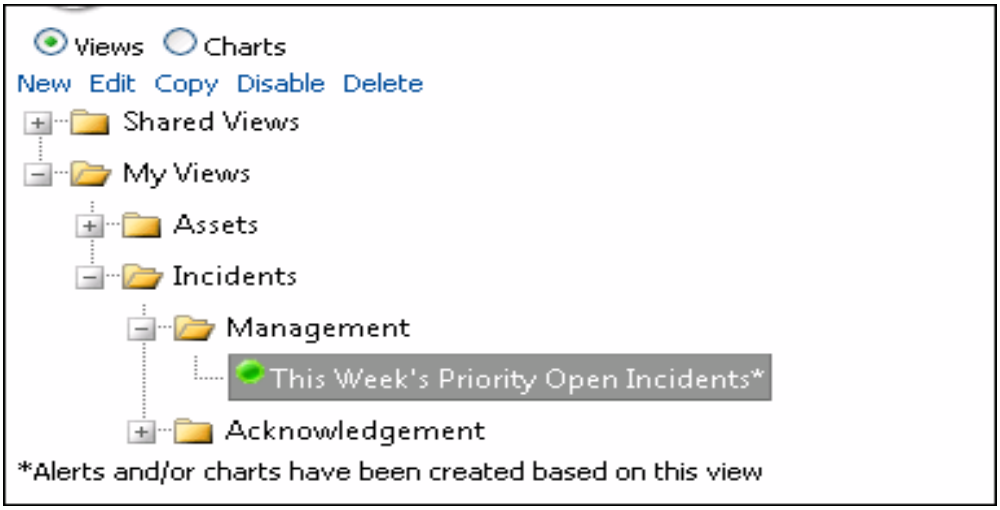
Enter the name of the view in the **View Name** field.

This name will appear in view lists (for example, in the view dropdown field in the tab content configuration dialog).

If displaying settings for an existing view on which one or more charts have been defined, the charts appear in the **Associated Charts** dropdown along with an Edit link. You can select a chart and click the Edit link to display the chart settings in the Chart Designer.

In the **Access** field, select:

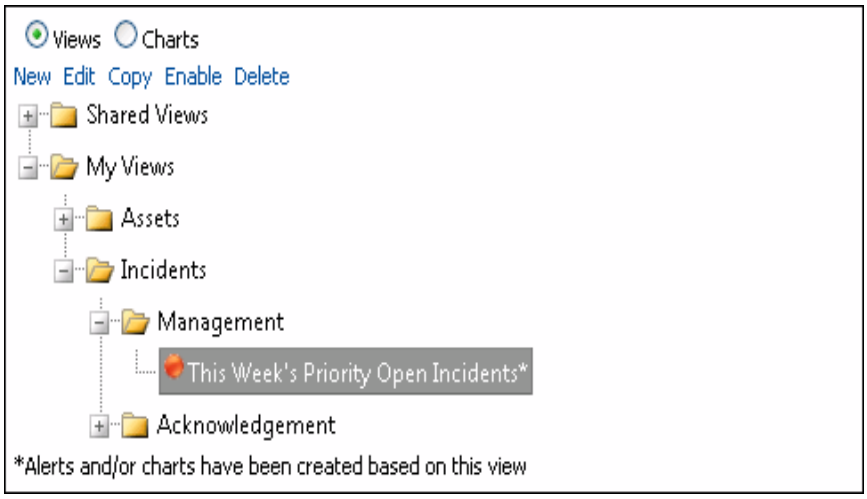
- Myself to keep the view private so only you can add it to your Desktop. The view will appear in the My Views folder in view lists (for example, in the View dropdown field in the tab content configuration dialog).



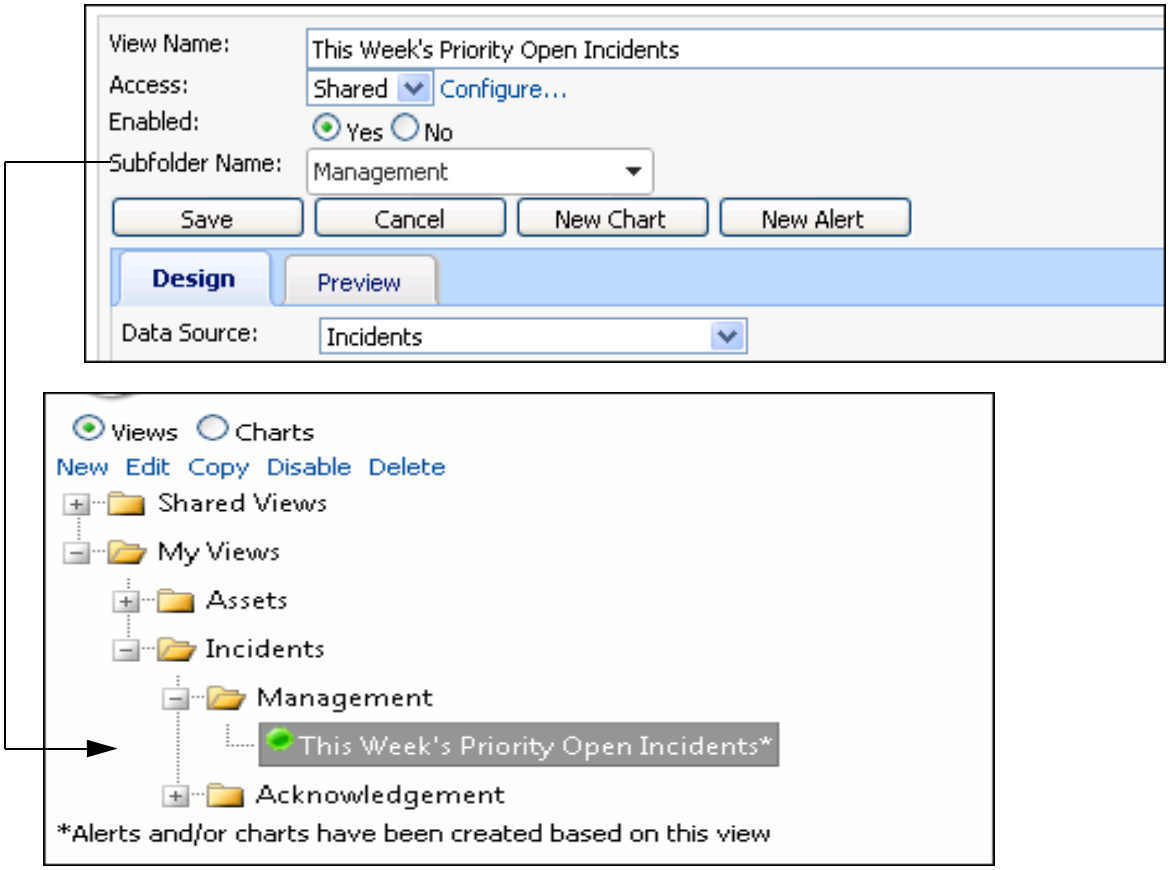
- Shared to make the view available for other support representatives to add to their Desktops. You can click the Configure link in the View Designer to restrict access to the view to only specified support representatives and support representative groups.

If you designate a view as Shared, it will appear to you under in the My Views folder; the My Views folder contains views that you have personally created via the View Designer.

In the **Enabled** field, select No if you wish to prevent the view from being included in the Chart Designer, Alert settings screen, and in the list of views available for selection in the View dropdown field in the tab content configuration dialog. Disabled views will appear as follows:

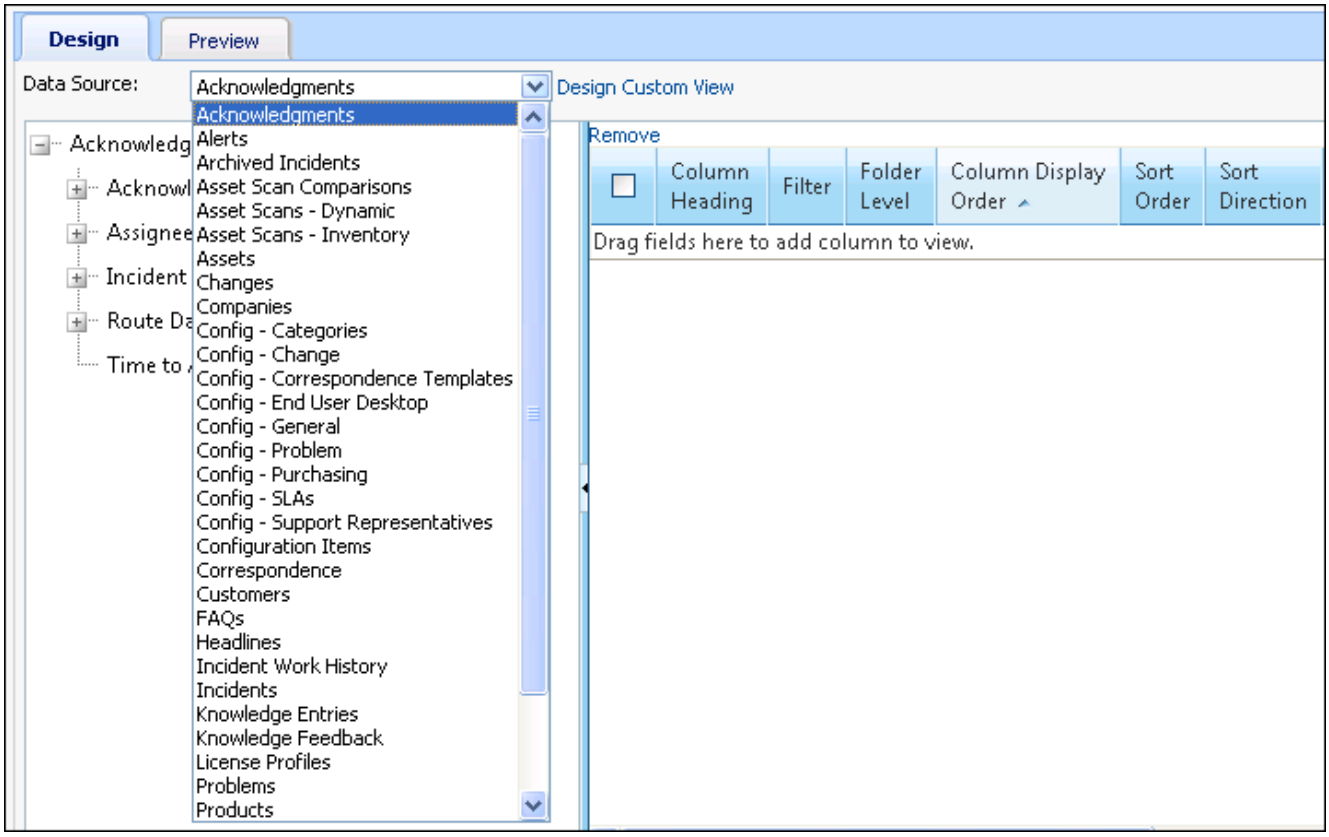


In the **Subfolder Name** field, enter the name of the folder in which to place the view in the Content Manager and in view lists. This folder will be placed under the folder named after the data source selected for the view.



Selecting the Data Source

Select the source of the data on which the view will be based. The Config options in the dropdown list correspond to functionality enabled in the Configuration module.

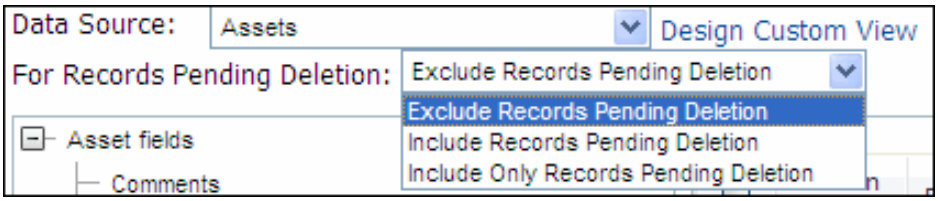


Use the **Design Custom View** link next to the Data Source Field to utilize any custom SQL views/ queries of iSupport data. The Custom Table or View Name field appears for you to enter the name of the query or custom SQL table of iSupport data. Click the Load Columns button to display the fields available for the view.

Use the **Design Standard View** link to redisplay the Data Source field.

Using the For Records Pending Deletion Field

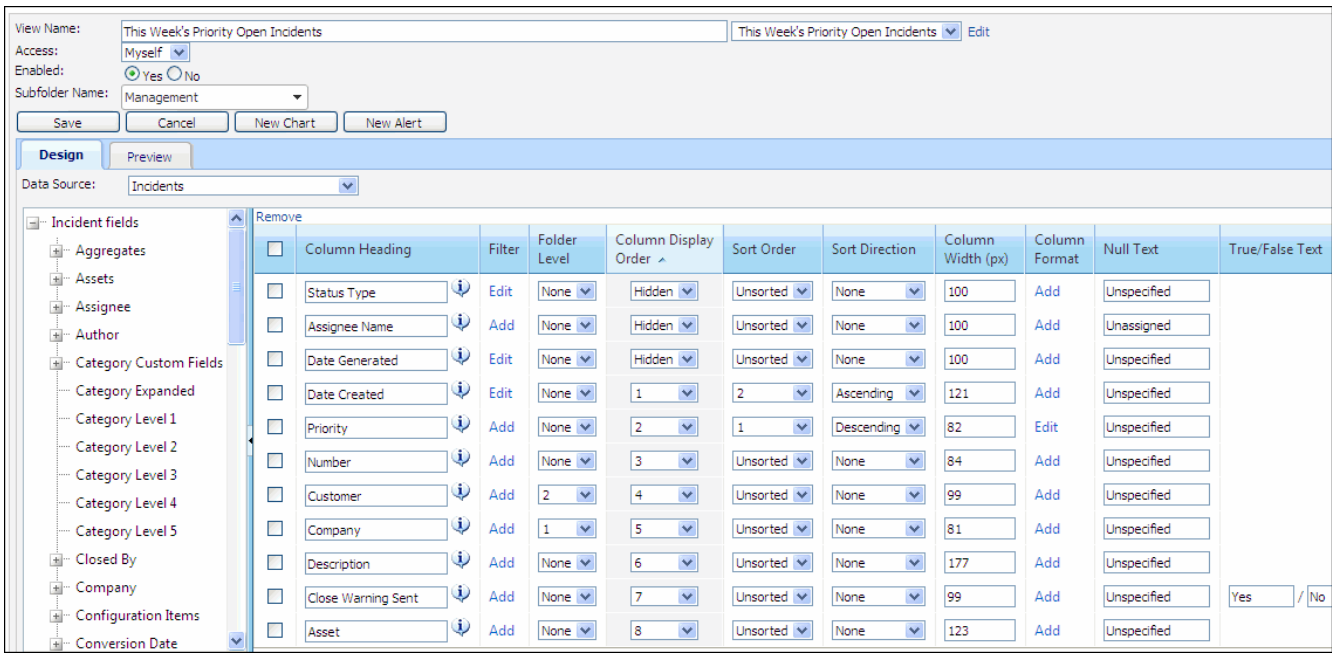
The **For Records Pending Deletion** field appears for data sources that have pending deletion functionality (Assets, Companies, Config - Categories, Config - SLAs, Config - Support Representatives, Customers, and Survey Requests).



Records pending deletion have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes the record. Use the For Records Pending Deletion field to specify whether to include, exclude, or include only records pending deletion.

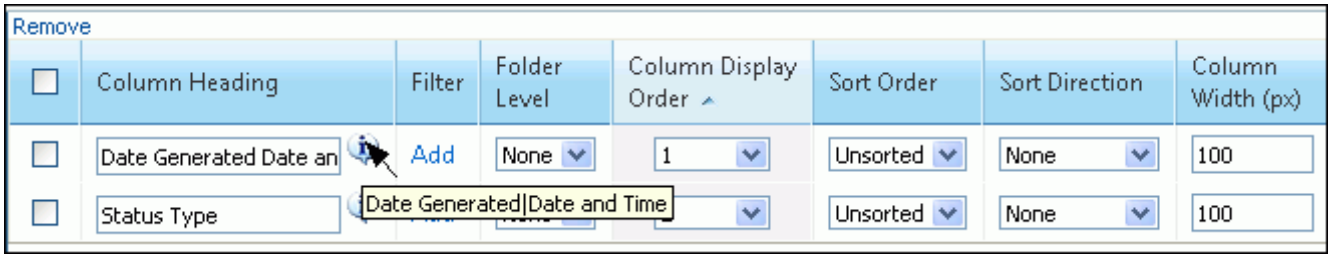
Including Fields in the View

The data source fields available for the view appear in the navigator on the left; drag the applicable fields to the section on the right.



To remove a field from the view, select the checkbox next to the field and click the Remove link. Note: The Date Generated field in the Incident source contains scheduled ticket information.

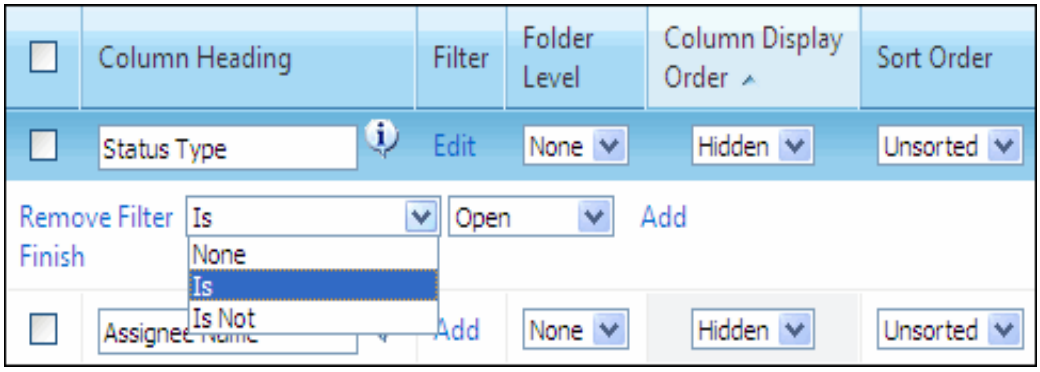
Under **Column Heading**, enter the text labeling the folder or column. If you select a field on a lower level in the navigator, all levels will appear in this field; edit it as necessary. You can hover your cursor over the Details icon to display the original name of the data source field.



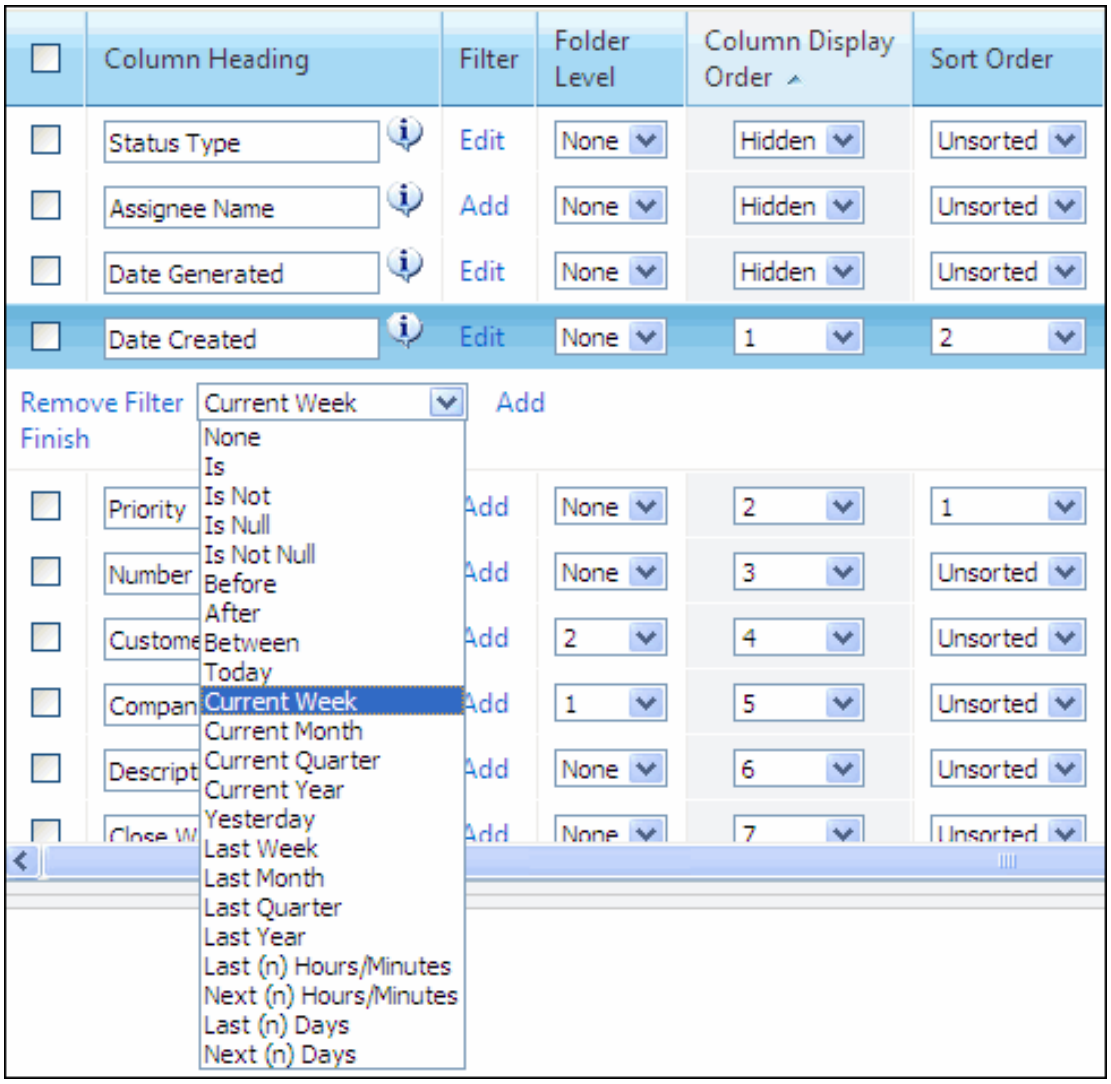
Filtering Your View

To set parameters for minimizing the amount of data that appears in the view, click the Add link. The Add Filter link appears; comparison methods applicable to the field appear in the dropdown. Select the comparison method and then enter the value to be used with it if applicable. Click Add to select another comparison method or click Finish when you are done.

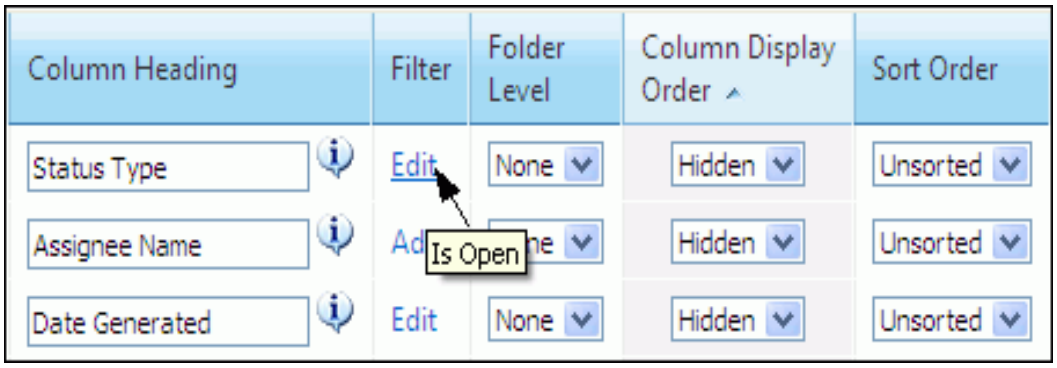
In the following example, the view will only include incidents with an open status.



This example view also includes a filter on the date created; the view will only include incidents with a creation date within the current week.



After a filter is created, you can hover your cursor over the Edit link to quickly display your filter.



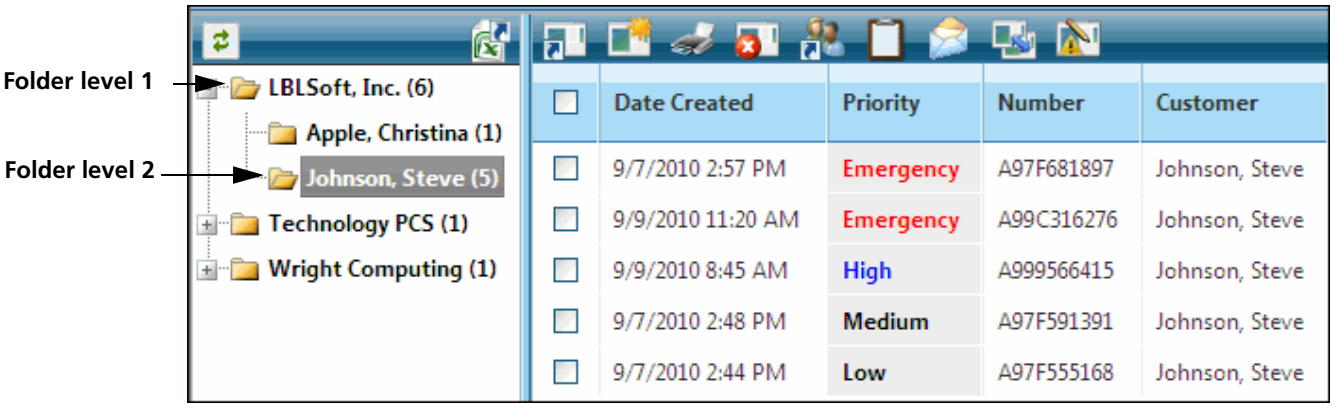
If a date field is selected, the Between comparison method does not include beginning and ending dates. The Current Week method is based on a Sunday through Saturday timeframe.

Specifying Folders in the View

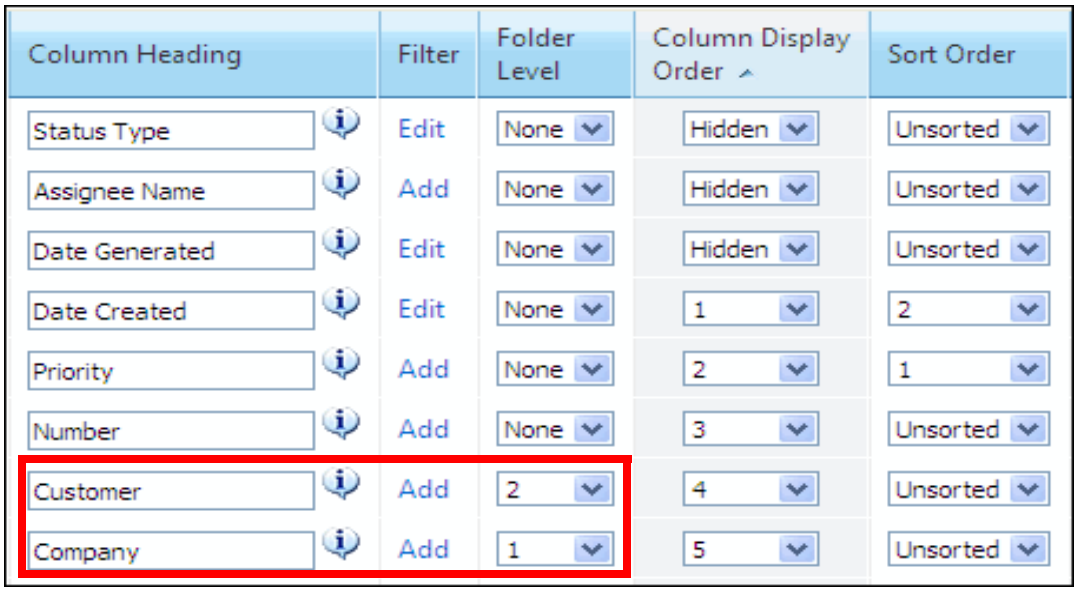
Use the Folder Level column to display a view field as a folder in the left navigator; enter the number for the position of the field as shown in the following example. If you wish to only display

the data as a folder, be sure to select Hidden in the Column Display Order field.

Folders in View



Settings in View Designer



Specifying View Columns

Select the number for the position of the column in the view (listed left to right): 1 = first column, 2 = second column, etc. Select Hidden if you do not wish to display the column (for example, if it is used as a folder in the left navigation frame).

View Columns

1	2	3	4	5	6	7	8
Date Created	Priority	Number	Customer	Company	Description	Close Warning Sent	Asset
9/7/2010 2:57 PM	Emergency	A97F681897	Johnson, Steve	LBLSoft, Inc.	Cannot connect to the netw...	No	Unspecified
9/9/2010 11:20 AM	Emergency	A99C316276	Johnson, Steve	LBLSoft, Inc.	Working remotely; cannot c...	No	Unspecified
9/9/2010 8:45 AM	High	A999566415	Johnson, Steve	LBLSoft, Inc.	Cannot print using printer in...	No	Unspecified
9/7/2010 2:48 PM	Medium	A97F591391	Johnson, Steve	LBLSoft, Inc.	Slow performance on emplo...	No	Unspecified
9/7/2010 2:44 PM	Low	A97F555168	Johnson, Steve	LBLSoft, Inc.	Unable to print from specifie...	No	Accounting Printer

Settings in View Designer

Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction
Status Type	Edit	None	Hidden	Unsorted	None
Assignee Name	Add	None	Hidden	Unsorted	None
Date Generated	Edit	None	Hidden	Unsorted	None
Date Created	Edit	None	1	2	Ascending
Priority	Add	None	2	1	Descending
Number	Add	None	3	Unsorted	None
Customer	Add	2	4	Unsorted	None
Company	Add	1	5	Unsorted	None
Description	Add	None	6	Unsorted	None
Close Warning Sent	Add	None	7	Unsorted	None
Asset	Add	None	8	Unsorted	None

Setting the Sort Order and Direction

In the **Sort Order** column, select the number for the order in which the field will be sorted relative to the rest of the fields in the view.

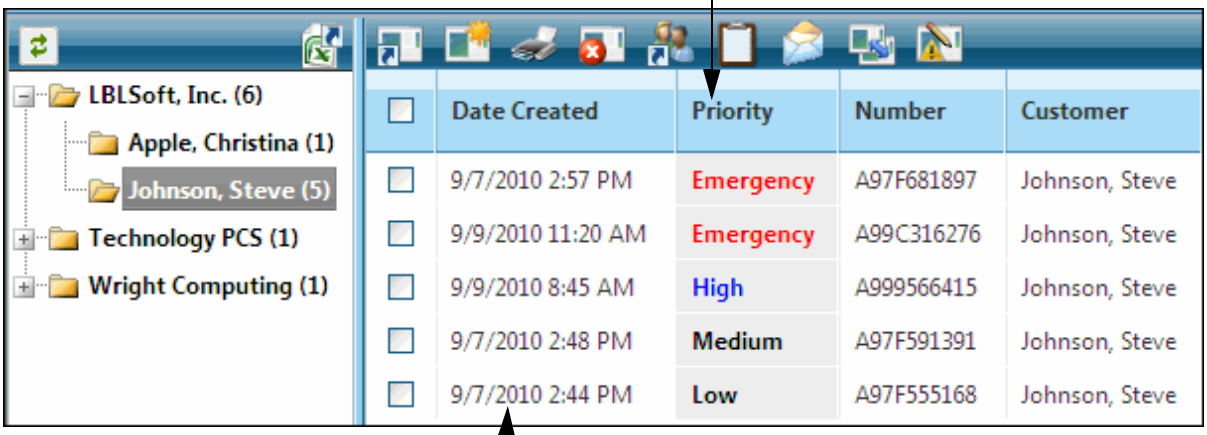
If a sort order was selected, select the following in the **Sort Direction** field:

- Ascending to sort field values in order from first to last/lowest to highest (alphabetically A-Z, lowest number to highest number, or in the case of Priority, Low to Emergency).
- Descending to sort field values in order from last to first/highest to lowest (alphabetically Z-A, highest number to lowest number, or in the case of Priority, Emergency to Low).

In the example below, incidents are sorted first by priority and then date created.

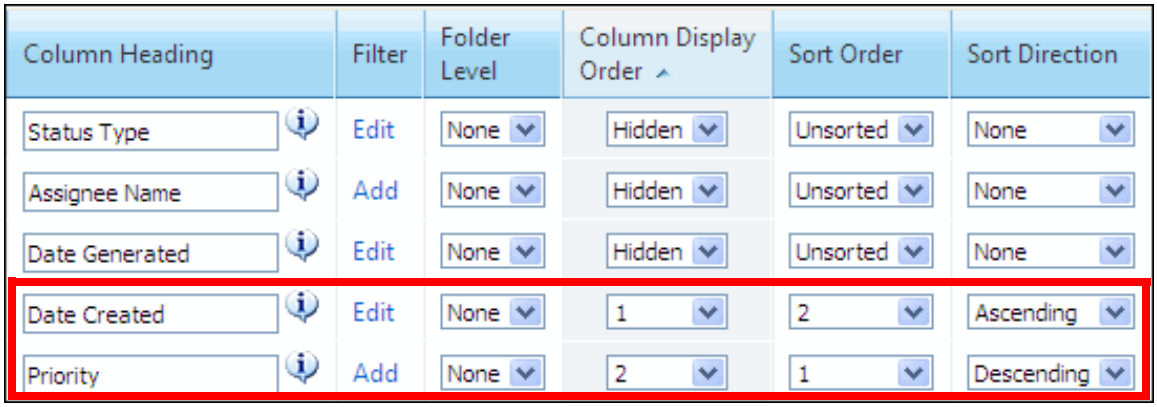
View

Sort Order 1: by Priority in Descending Order



Sort Order 2: By Date Created in Ascending Order

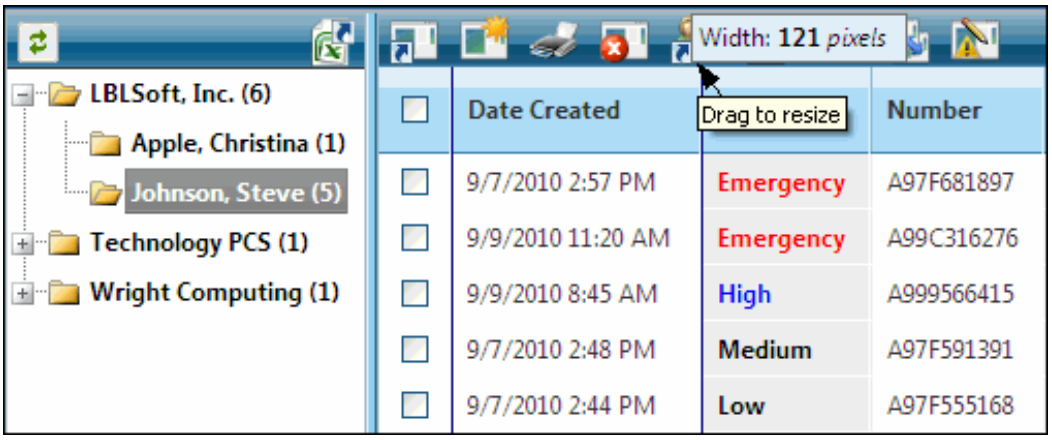
Settings in View Designer



Specifying the Column Width

Under Column Width (px), enter the width (in pixels) for the field to appear in the view column. When you display the view and resize the column, the width in pixels will appear in a tooltip.

Width appears in the view when you resize a column

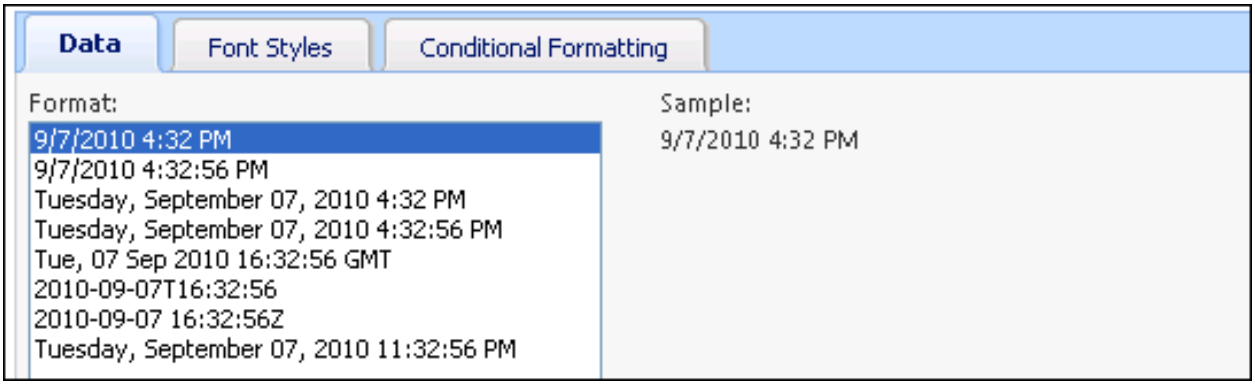


Settings in View Designer

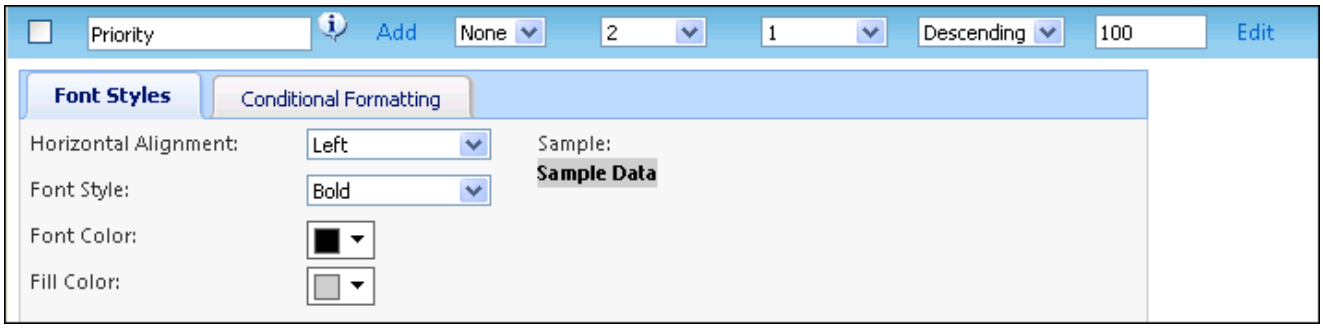
Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction	Column Width (px)
Status Type	Edit	None	Hidden	Unsorted	None	100
Assignee Name	Add	None	Hidden	Unsorted	None	100
Date Generated	Edit	None	Hidden	Unsorted	None	100
Date Created	Edit	None	1	2	Ascending	121
Priority	Add	None	2	1	Descending	82

Formatting Column Data

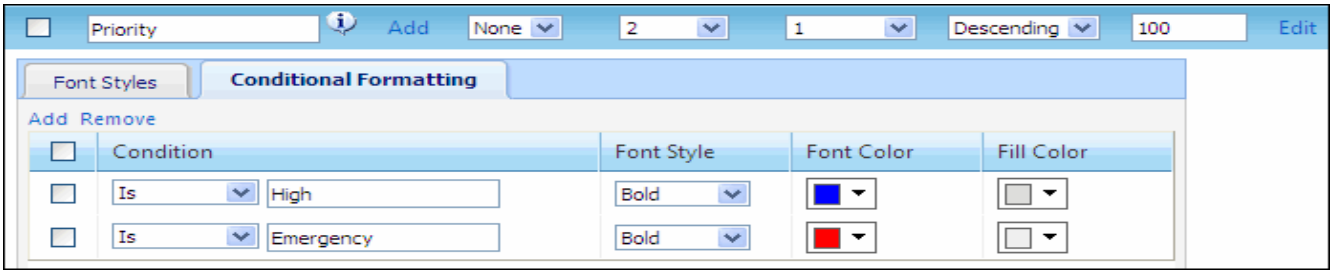
You can configure the appearance of column text in views. You can configure the date format, font and alignment of values in an entire column, and the format of values that meet specified parameters. The Data tab appears for date fields; use it to configure display of the day, month, year, and time.



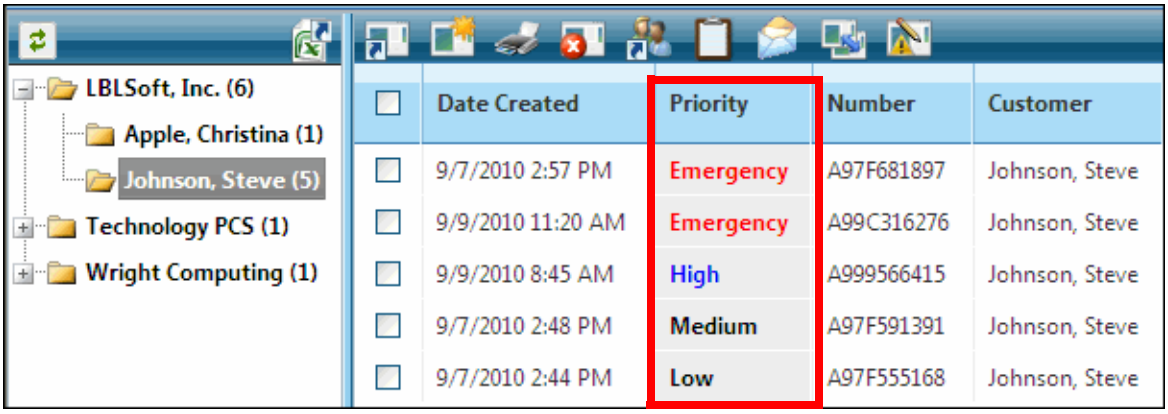
Use the Font Styles tab to set the horizontal alignment, font style, font color, and fill color for all of the data in the column.



Use the Conditional Formatting tab to base data formatting on set parameters. Select the comparison method, enter the value to be used with it, and then select the font style, font color, and/or fill color. If a value meets the specified condition, it will display in the specified format.

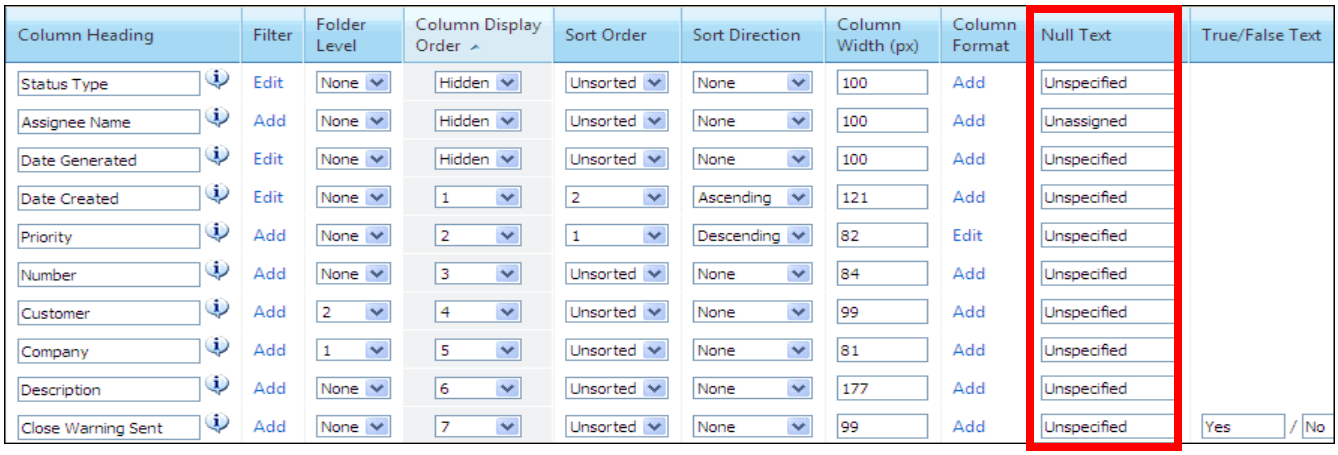


In this example the settings will appear as follows:



Specifying Null and True/False Text

In the **Null Text** column, enter the text to appear when the data value in the view is nothing or zero.

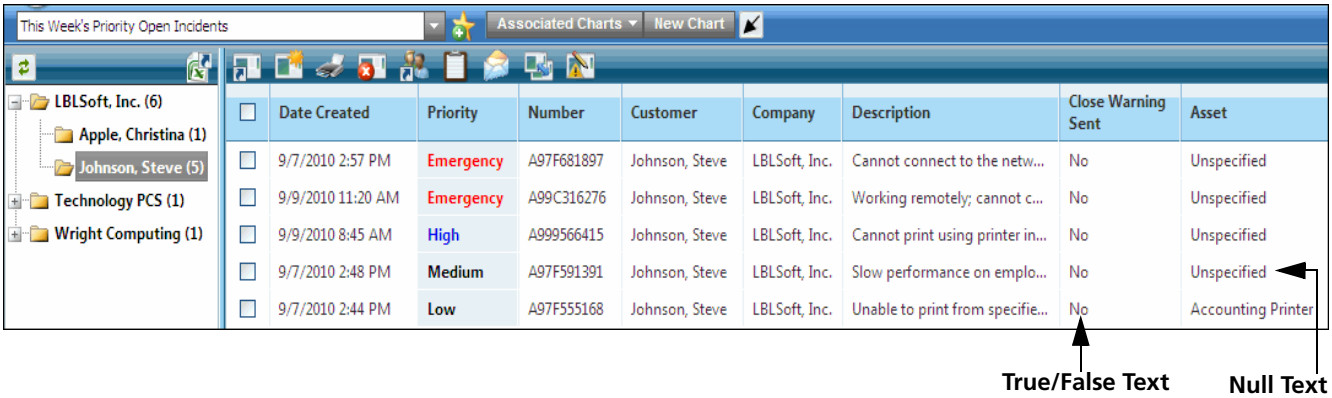


Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction	Column Width (px)	Column Format	Null Text	True/False Text
Status Type	Edit	None	Hidden	Unsorted	None	100	Add	Unspecified	
Assignee Name	Add	None	Hidden	Unsorted	None	100	Add	Unassigned	
Date Generated	Edit	None	Hidden	Unsorted	None	100	Add	Unspecified	
Date Created	Edit	None	1	2	Ascending	121	Add	Unspecified	
Priority	Add	None	2	1	Descending	82	Edit	Unspecified	
Number	Add	None	3	Unsorted	None	84	Add	Unspecified	
Customer	Add	2	4	Unsorted	None	99	Add	Unspecified	
Company	Add	1	5	Unsorted	None	81	Add	Unspecified	
Description	Add	None	6	Unsorted	None	177	Add	Unspecified	
Close Warning Sent	Add	None	7	Unsorted	None	99	Add	Unspecified	Yes / No

In the **True/False Text** column, enter the text to appear when the data value in the view is True/False.

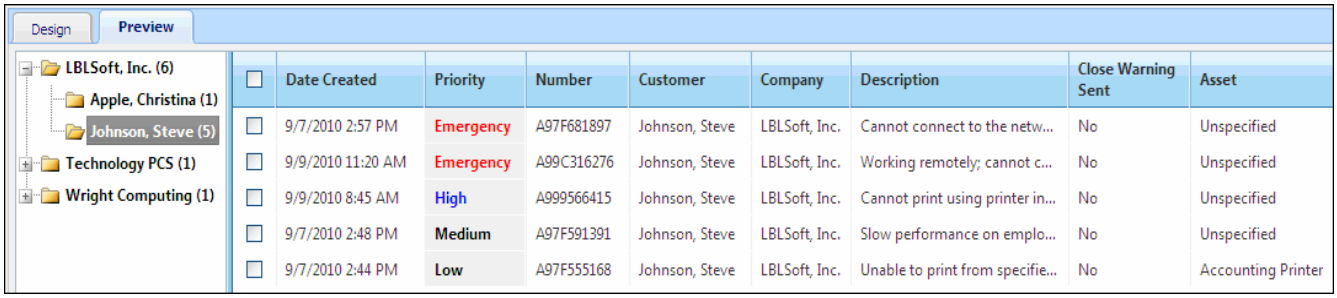
Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction	Column Width (px)	Column Format	Null Text	True/False Text
Status Type	Edit	None	Hidden	Unsorted	None	100	Add	Unspecified	
Assignee Name	Add	None	Hidden	Unsorted	None	100	Add	Unassigned	
Date Generated	Edit	None	Hidden	Unsorted	None	100	Add	Unspecified	
Date Created	Edit	None	1	2	Ascending	121	Add	Unspecified	
Priority	Add	None	2	1	Descending	82	Edit	Unspecified	
Number	Add	None	3	Unsorted	None	84	Add	Unspecified	
Customer	Add	2	4	Unsorted	None	99	Add	Unspecified	
Company	Add	1	5	Unsorted	None	81	Add	Unspecified	
Description	Add	None	6	Unsorted	None	177	Add	Unspecified	
Close Warning Sent	Add	None	7	Unsorted	None	99	Add	Unspecified	Yes / No

In this example these settings will appear as follows:



Previewing Your View

Use the Preview tab to display your view.



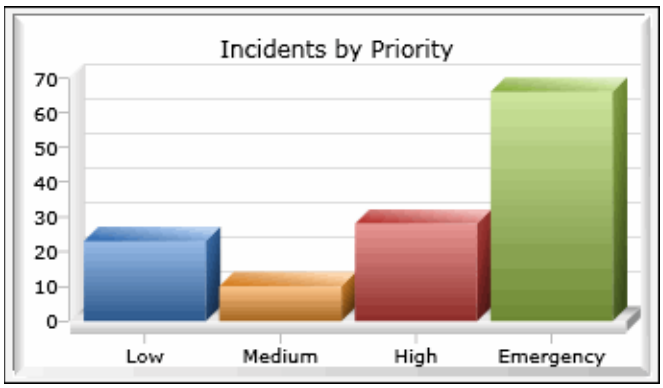
Using the Chart Designer

Use the Chart Designer to create charts based on views of iSupport data. You can make the chart available to all other support representatives or restrict access to specified support representatives and/or groups. You can access the Chart Designer from the Desktop action menu or the New Chart button in the View Designer.

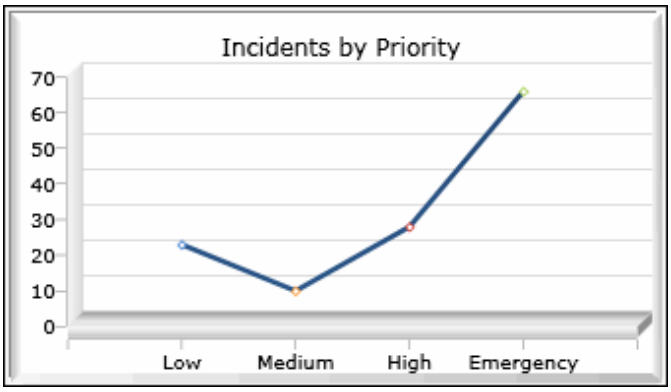
Display Types

Display types include both charts and gauges. You can create the following types of **charts**; the chart colors change dynamically based on value.

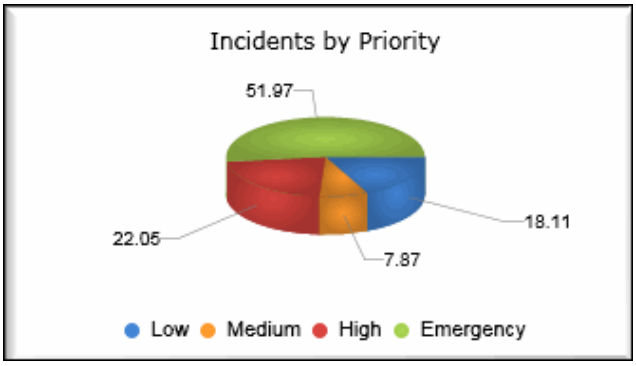
Bar Chart



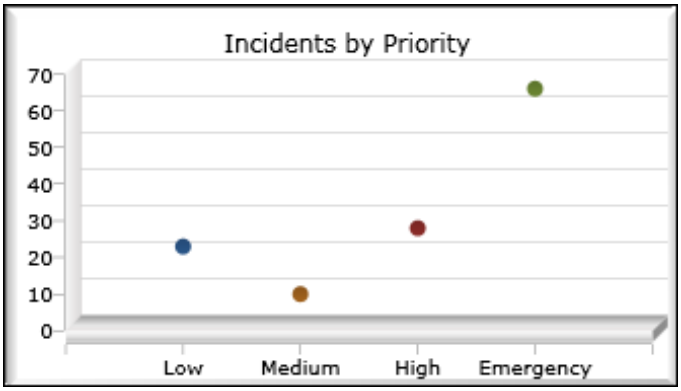
Line Chart



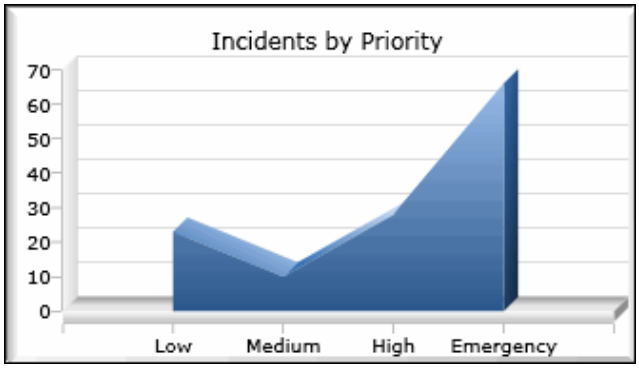
Pie Chart



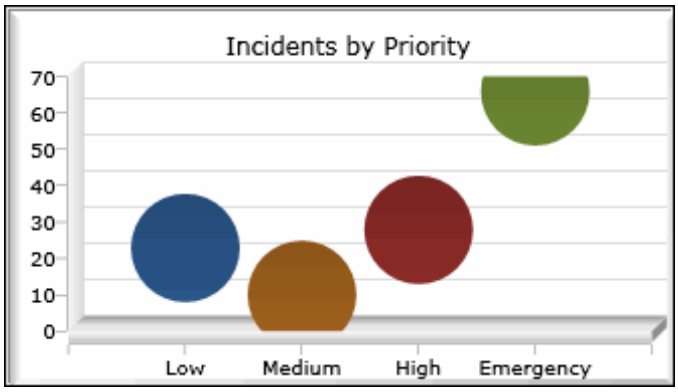
Point Chart



Area Chart

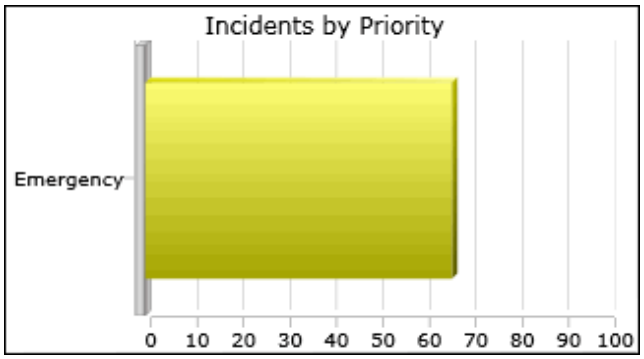


Bubble Chart

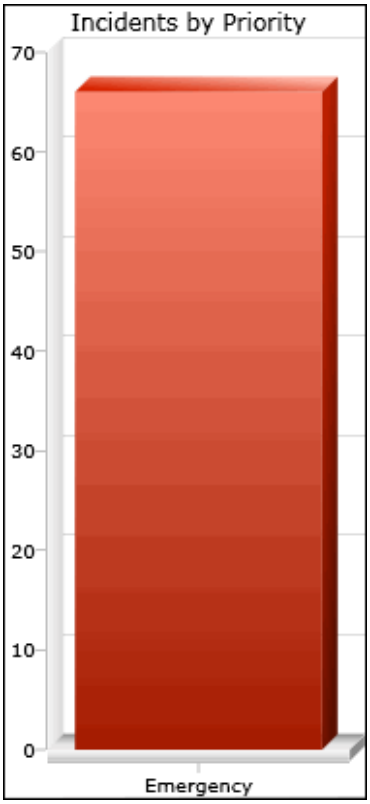


You can create the following types of **gauges**.

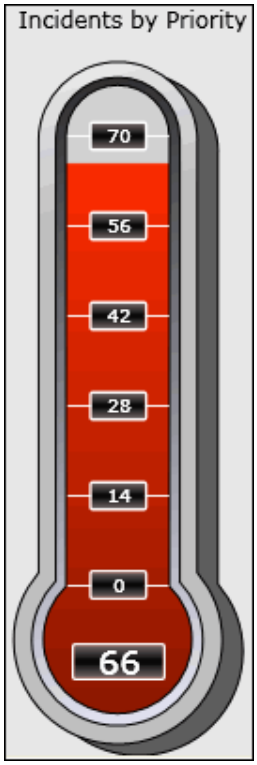
Horizontal Gauge



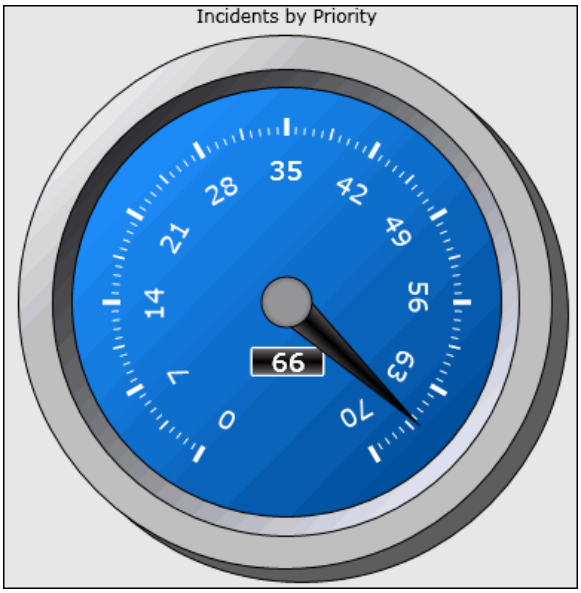
Vertical Gauge



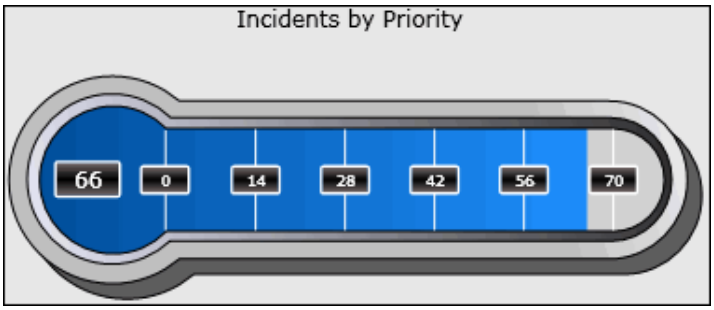
Vertical Thermometer



Full Gauge



Horizontal Thermometer



Half Gauge

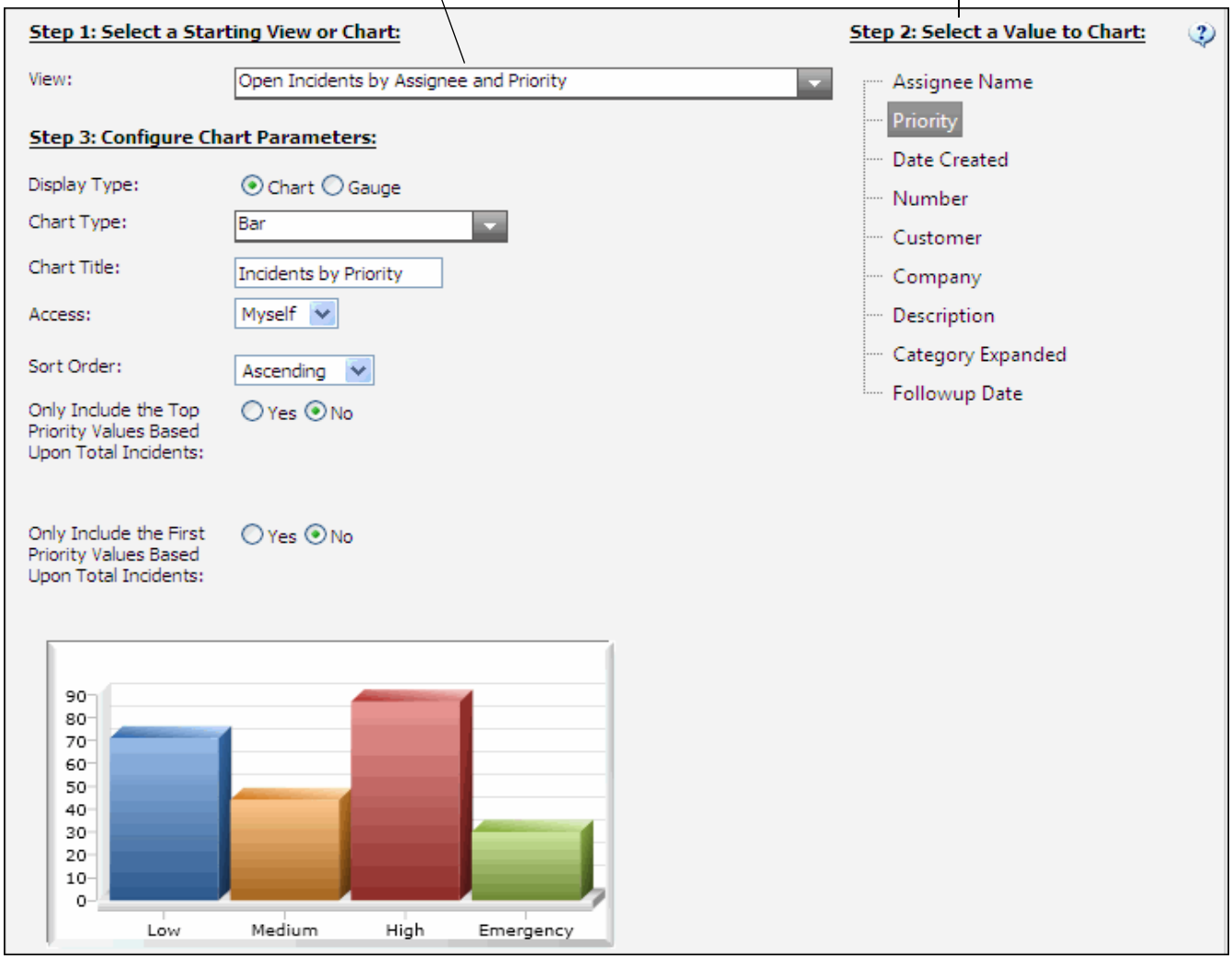
Quarter Gauge

Creating a Chart

Charts are based on view values; to get started, you'll need to use the View and Chart fields to select the view or existing chart on which to base the new chart. If you select an existing chart, the view, value, and other parameters configured for the chart will appear; you can make changes and save with a different chart title. The values in the views appear under Step 2.

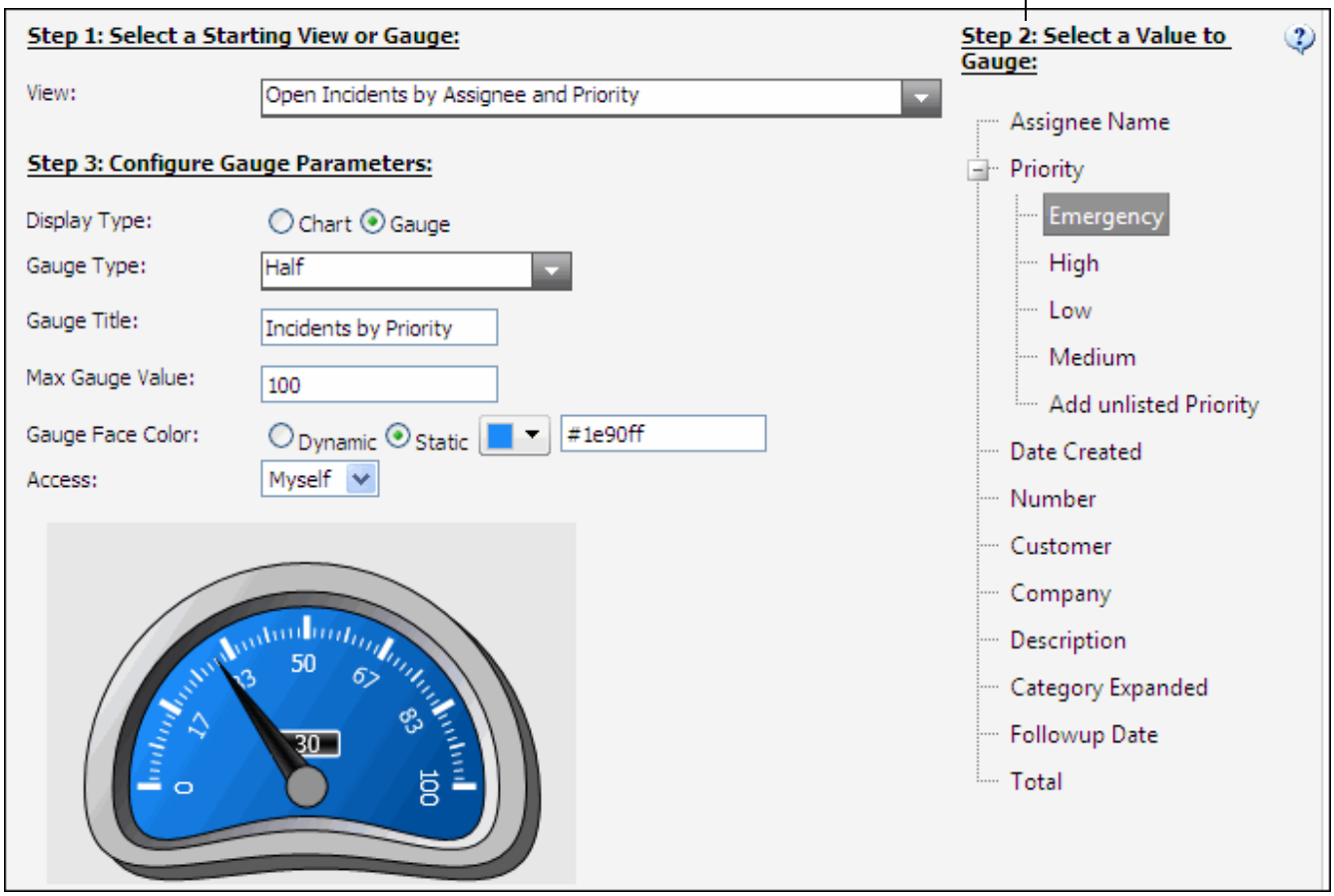
Use the dropdown in the View field to select one of your favorite views, a shared view, or a private view that you created previously.

The values in the view appear here; it will change depending on the display type. If you select a Chart display type, the chart will depict multiple types of values (for example, all types of priority).



The values in the **Step 2: Select a Value to Chart** section change if creating a Gauge display type.

If you select a Gauge display type, it will depict the amount of a specific value (for example, the number of emergency priority incidents), so you'll need to select a specific value in Step 2 if creating a gauge chart.

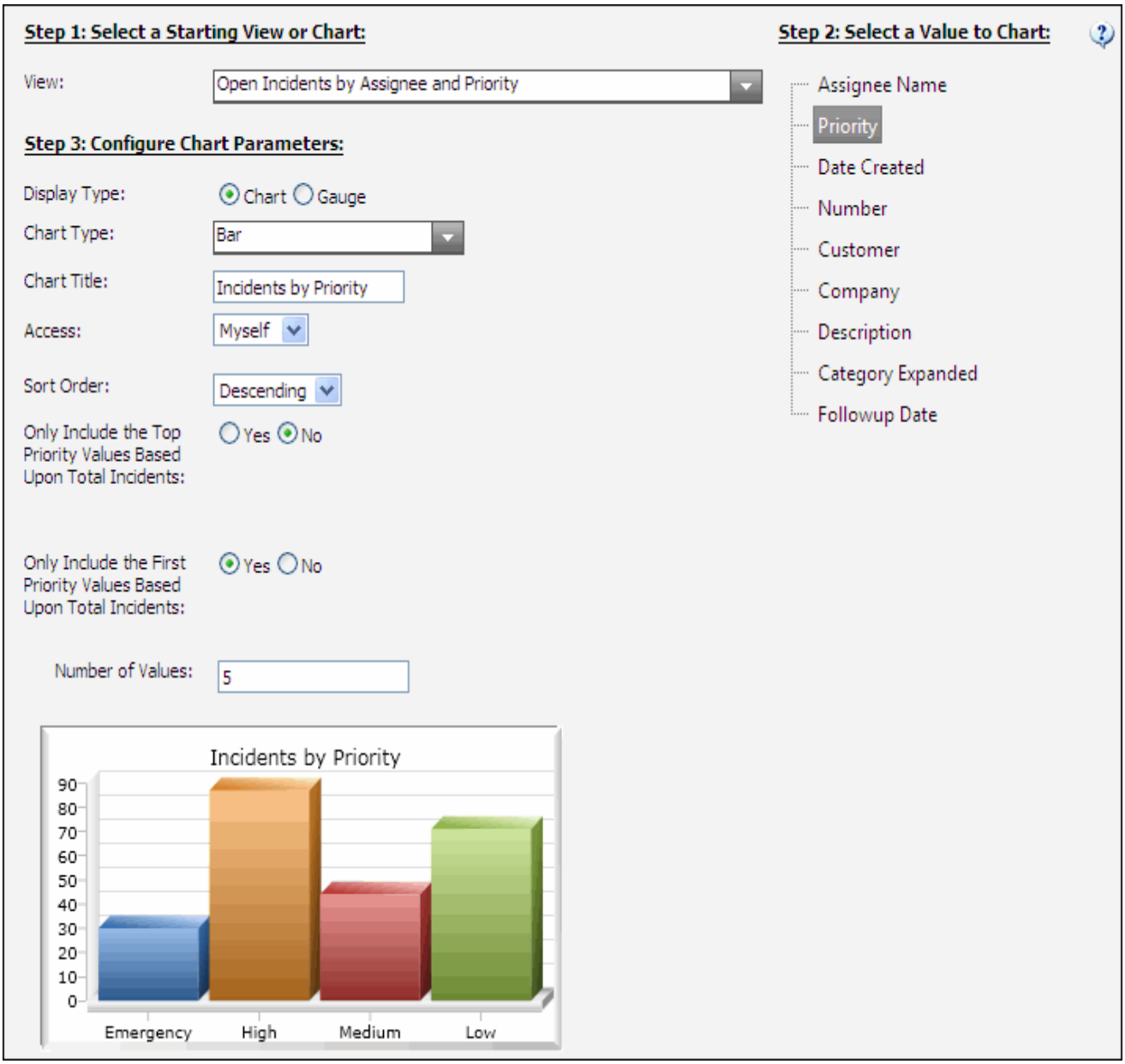


Use the fields in the **Step 3: Configure Chart Parameters** section to design the chart.

Field	Description
Display Type	Select: ■ Chart to depict multiple types of values (for example, all types of priority) in the format of a bar, line, pie, point, area, or bubble chart. ■ Gauge to depict the amount of a specific value (for example, the number of emergency priority incidents) in the format of a thermometer or dial.
Chart/Gauge Type	■ If Chart is selected in the Display Type field, you can select one of the following: Bar, Line, Pie, Point, Area, and Bubble. ■ If Gauge is selected in the Display Type field, you can select one of the following: Horizontal, Vertical, Full, Half, Quarter, Horizontal Thermometer, and Vertical Thermometer. See "Display Types" on page 90 for examples of each.
Chart/Gauge Title	Enter a name for the newly created chart or gauge.

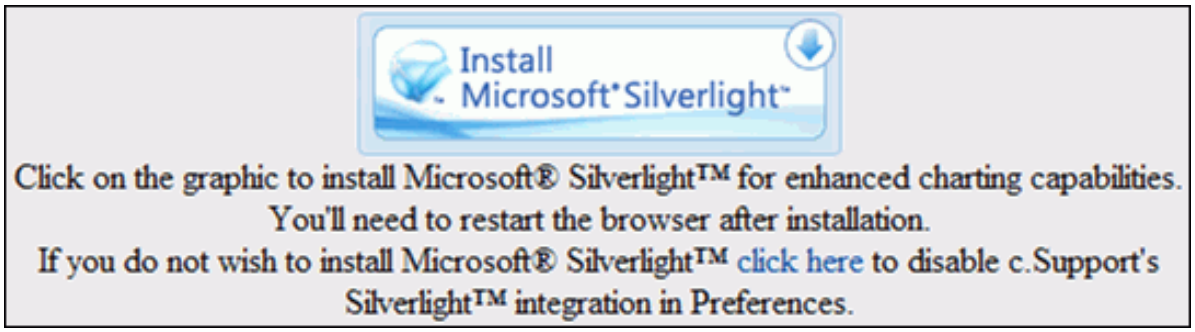
Field	Description
Max Gauge Value	This field appears if Gauge is selected in the Display Type field. Enter the number to appear at the top of the gauge.
Gauge Face Color	This field appears if Gauge is selected in the Display Type field and Full, Half, Quarter, Horizontal Thermometer, or Vertical Thermometer is selected in the Chart Type field. Select: ■ Static to display a specified color for the gauge; the gauge will remain this color as the amount of the selected value changes. You can choose the color from the color selector or enter the hexadecimal color code. ■ Dynamic to display a gauge that will change color (calculated along the color scale from blue to red) every time the amount of the value changes. If the current value exceeds the number entered in the Max Gauge Value field, the gauge will remain red.
Access	Select: ■ Select Myself to keep the chart or gauge private so only you can display it on your Desktop. ■ Select Shared to make the chart or gauge available for other support representatives for displaying on their Desktops.
Sort Order	Select the direction in which to sort the chart: Ascending or Descending.
Only Include the Top (*Entity*) Values Based on Total (*View Entity*)	If Chart is selected in the Display Type field, select Yes to only include a specified number of the top grouping. Then enter the number. For example, enter 10 to only include the top ten companies.

Field	Description
Only Include the First (*Entity*) Values Based Upon Total (*View Entity*)	If Chart is selected in the Display Type field, select Yes to only include a specified number of values, from the start of the list according to the specified sort order. Then enter the number. For example, if selecting incidents by followup date in descending order, enter 6 to only include the first 6 dates from newest to oldest date.



You can utilize Microsoft® Silverlight™ for enhanced charting capabilities; enable use of Silverlight charts via the Use Microsoft® Silverlight™ Charts field on the Functionality tab in Global Configuration. If enabled, a Use Microsoft® Silverlight™ Charts field appears on the Basics

tab in the Preferences screen for each support representative. Microsoft® Silverlight™ must be installed locally in order to utilize its capabilities; the following will appear if the Microsoft® Silverlight™ Charts fields are enabled but the Microsoft® Silverlight™ client is not installed.

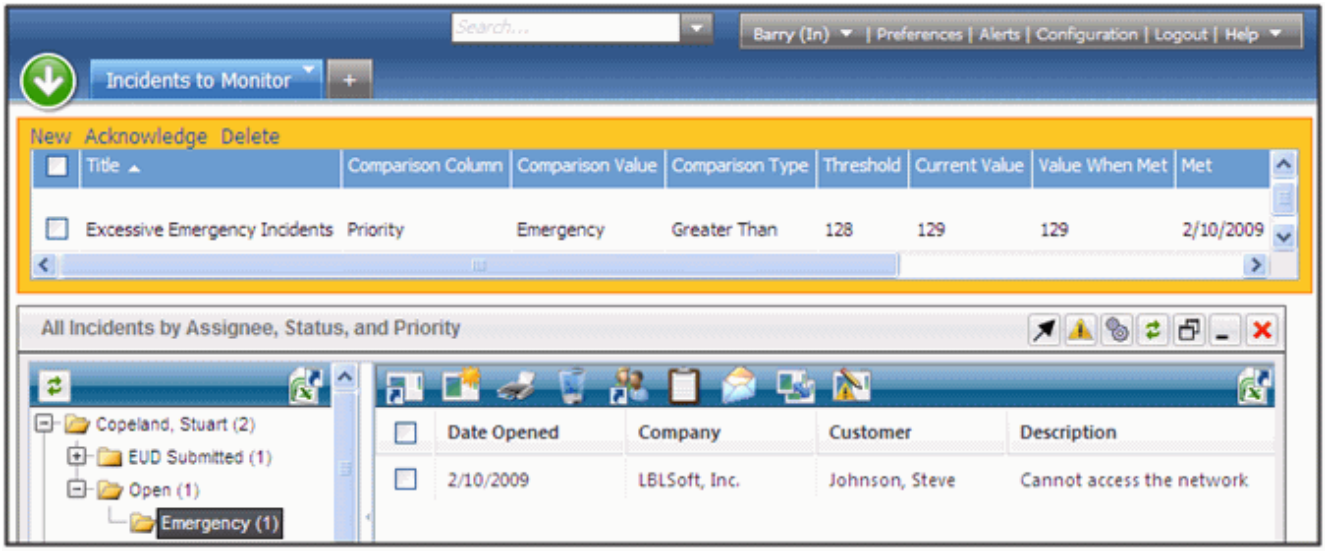


Depending on your gauge limit, iSupport will attempt to spread that value over the range of gauge tick marks, in whole integer values. Some values may not display well as they are calculated across the gauge face. For example, a quarter gauge, with a limit of 5 has the value 2 displayed twice on the tick marks, changing the value from 5 to 6 will cause the gauge to look correct and convey better information.

When displaying a guage in a component window on the Desktop, you can use the Scale Mode field in the component configuration dialog to stretch or proportionally display the guage.

Creating Alerts

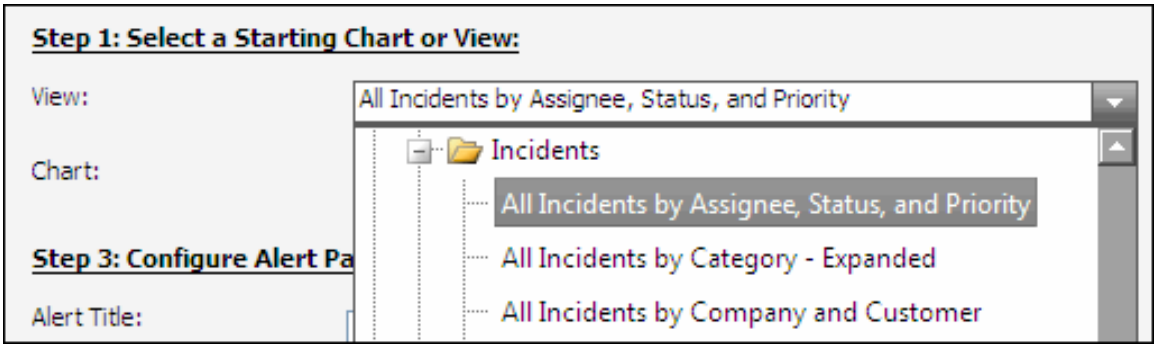
You can configure an alert to appear at the top of the Desktop tabs when a view field reaches a certain threshold. For example, you can configure an alert to appear when a certain number of Emergency priority incidents has been reached. The alert will appear until you select it and click the Acknowledge, Reinstate, or Delete link. Alerts can also be sent via email and page. Alert criteria is evaluated based on the schedule of the Alert agent.



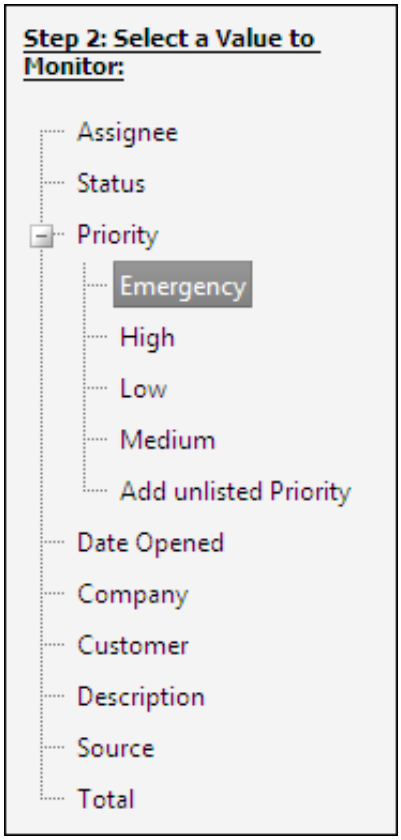
If sending an alert via email and/or page, and you wish to send a notification other than the default, first create the custom notification via the Global Settings | Custom Notifications screen.

To configure an alert, click the Alerts link in the menu bar at the top of the Desktop screen or click the Alert icon in a Desktop content frame.

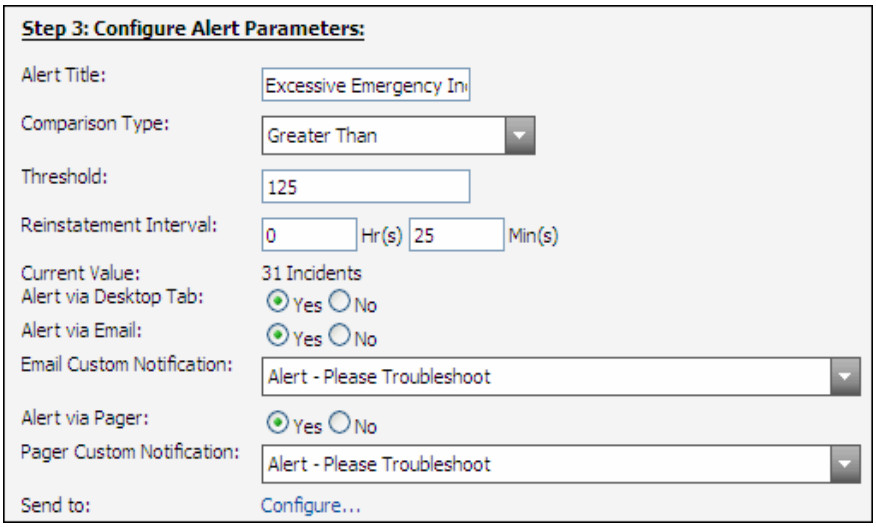
As with charts, alerts are based on view values; use the View field or the Chart field to select the view or existing chart on which to base the alert. If you select an existing chart, the view and value on which it is based will appear.



The values in the view appear in the Step 2: Select a Value to Chart section; select the value to be used as the basis for the alert. For example, if configuring an alert to appear when a certain number of Emergency priority incidents has been reached, you would select Emergency.



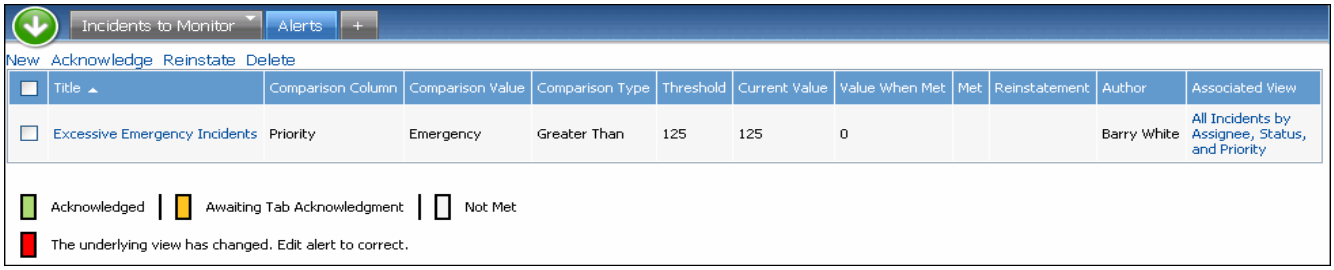
Use the fields in the Step 3: Configure Chart Parameters section to specify the title, criteria, and notification options.



Field	Description
Alert Title	Enter a name for the alert.

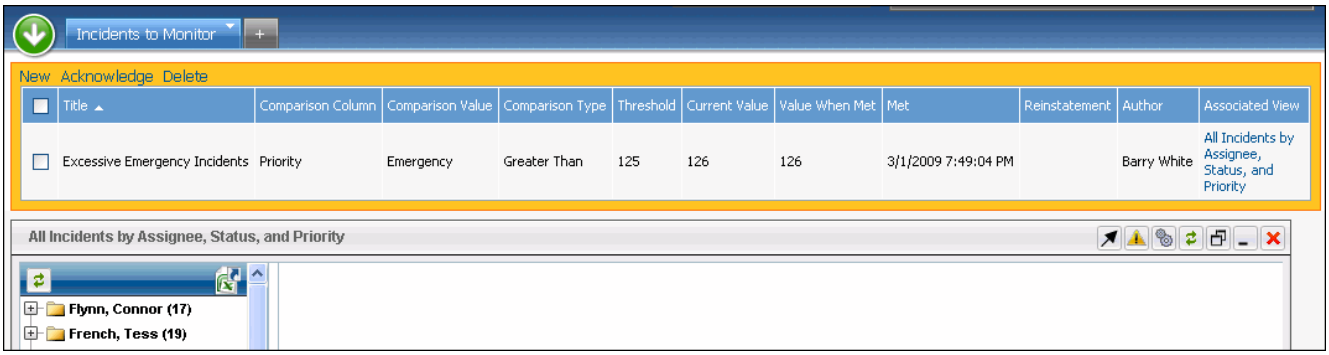
Field	Description
Comparison Type	Select the condition that will use the value in the Threshold field to trigger the alert: Greater Than, Equal, Less Than, Less than or Equal, or Greater Than or Equal.
Threshold	Enter the number that will be used by the value in the Comparison Type field to trigger the alert.
Reinstatement Interval	After an alert is acknowledged, enter the number of hours after which the alert criteria should be automatically evaluated (based on the schedule of the Alert agent). The alert criteria will also be evaluated when a support representative clicks the Reinstate link in the alert display frame.
Current Value	The current number of view items appears; for example, if your view is based on incidents, the current number of incidents appears.
Alert via Desktop Tab	Select Yes to display the alert on the Desktops of the support representatives and/or support representative groups designated in the Send To field.
Alert via Email	Select Yes to send an alert email to the support representatives and/or support representative groups designated in the Send To field. The email will contain the following: Subject: [iSupport] *<alert name>* Alert Met Body: Threshold of *<comparison type>* *<threshold>* *<data source>* for *<selected value to monitor>* met.
Email Custom Notification	Select No Notification to send no notification, iSupport Default to use the default notification text, or select a custom notification created via the Custom Notifications link under Global Settings in the Configuration module.
Alert via Pager	Select Yes to send an alert page to the support representatives and/or support representative groups designated in the Send To field.
Pager Custom Notification	Select No Notification to send no notification, iSupport Default to use the default notification text, or select a custom notification created via the Custom Notifications link under Global Settings in the Configuration module.
Send To	Click the Configure link to display a screen for selecting the support representatives and/or support representative groups that should receive the alert when the criterion is met.

After you click Save, the alert appears on the Desktop as shown below:

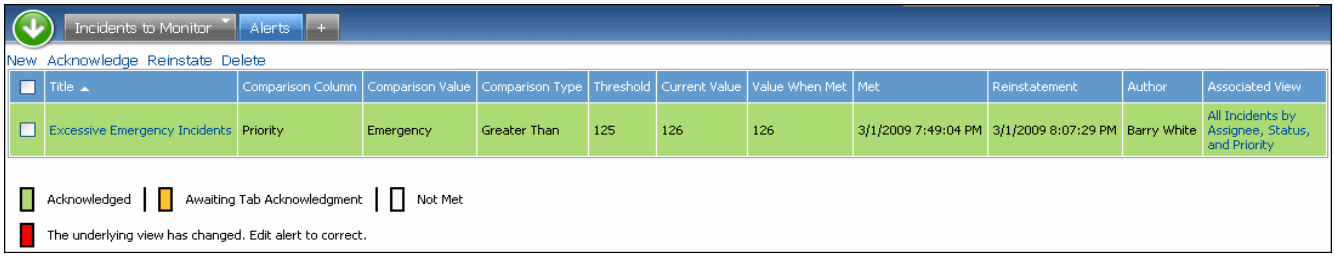


Be sure to schedule the Alert agent after you configure an alert; see the Miscellaneous Administrative Tasks chapter in the *iSupport Administrator's Guide* for more information.

When the alert is triggered, it appears as shown below to the support representative who configured it or support representatives specified in the Send To field:



To acknowledge an alert, select it and click the **Acknowledge** link. The alert appears as shown below:

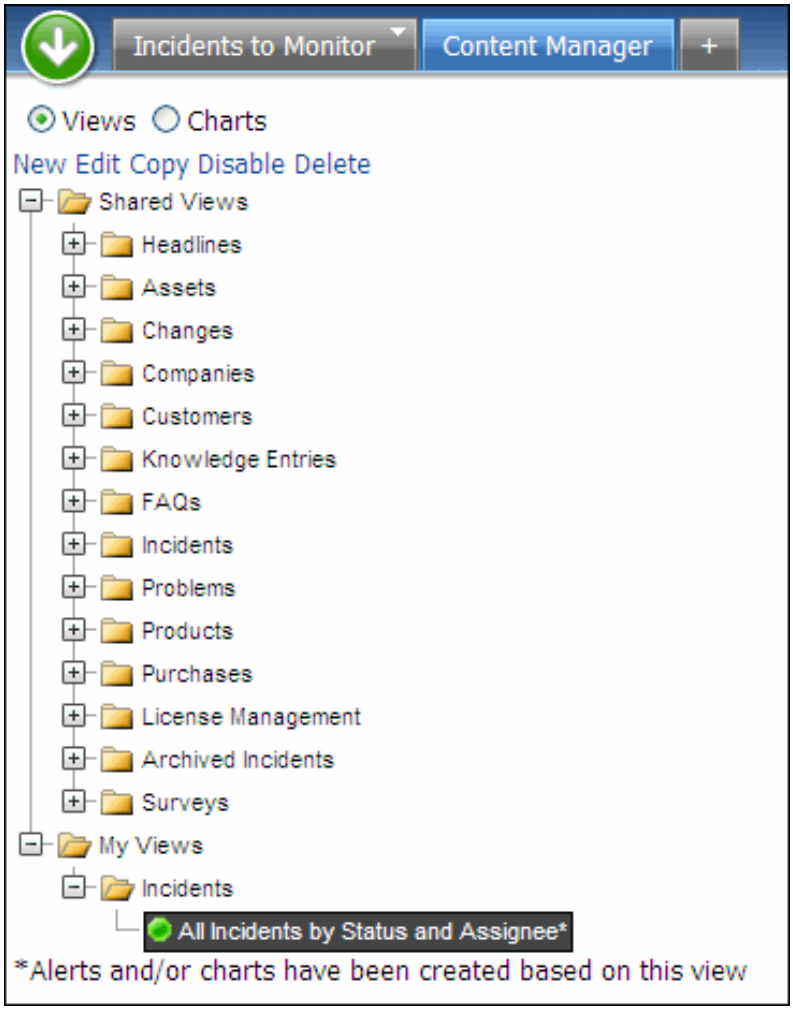


You can click the **Reinstate** link in the alert display frame to force the alert criteria to be evaluated the next time the Alert agent runs after the reinstatement interval has started.

If red appears, it is because an alert was based on a column in a view and then that column was later removed from the view. Select the alert in the Title column to change its settings.

Managing View and Chart Content

Use the Content Manager to create, edit, copy, enable/disable, and delete a view or chart. An asterisk indicates that alerts and/or charts are based on a view.



Use the View and Chart radio buttons to select the type of content you wish to work with.

Views

The views that appear under My Views are views that you have personally created via the View Designer.

- To **create** a view, click the New link to display the View Designer.
- To **edit** a view, select the view and click the Edit link to open the view in the View Designer. Note that you cannot modify views that are included in iSupport by default.
- To **copy** a view, select the view and then click the Copy link to open the view in the View Designer with "Copy of" in the View Name field.

- To **disable** a chart (enabled charts appear with a green dot), select the chart and click the Disable link. To enable a chart that has been disabled (it will appear with a red dot), select the chart and click the Enable link.
- To **delete** a view, select the view and click the Delete link.

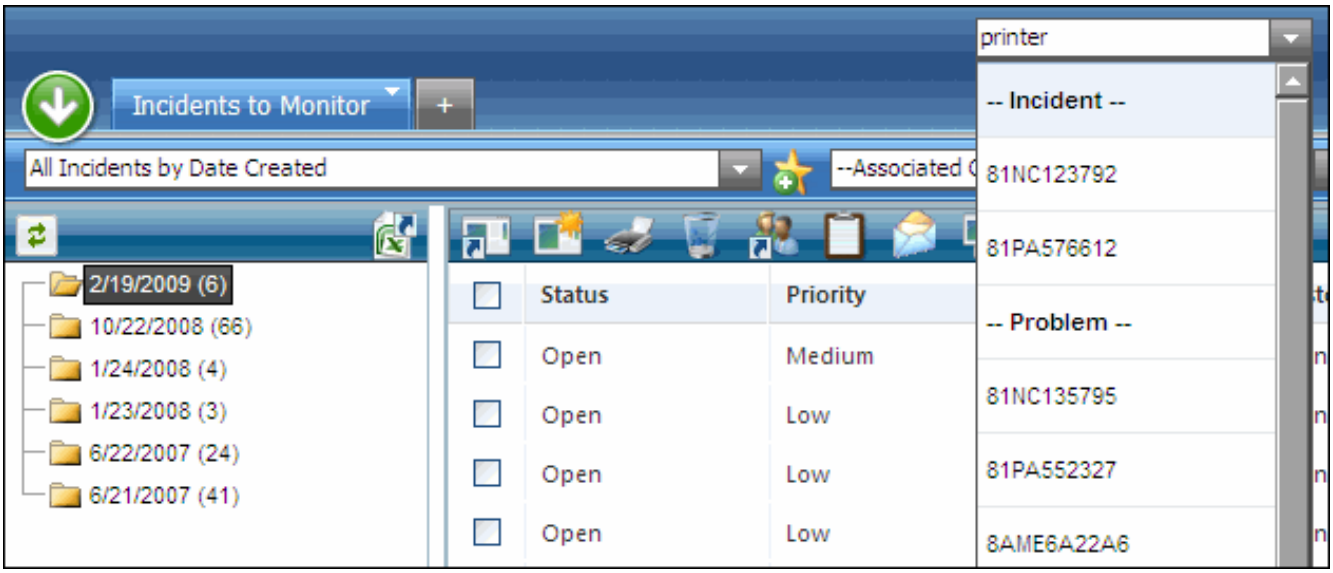
Charts

The charts that appear under My Charts are charts that you have personally created via the Chart Designer.

- To **create** a chart, click the New link to display the Chart Designer.
- To **edit** a chart, select the chart and then click the Edit link to open the chart in the Chart Designer. Note that you cannot modify charts that are included in iSupport by default.
- To **copy** a chart, select the chart and then click the Copy link to open the chart in the Chart Designer.
- To **disable** a chart (it will appear with a green dot), select the chart and click the Disable link. To enable a chart that has been disabled (it will appear with a red dot), select the chart and click the Enable link.
- To **delete** a chart, select the chart and click the Delete link. Note that you cannot delete charts that are included in iSupport by default.

Performing Searches

Use the Search dropdown on the Desktop to perform a literal search for a character string within all iSupport data. The 10 most recent records will be returned. If only one record matches the search, the record will open automatically when selected.



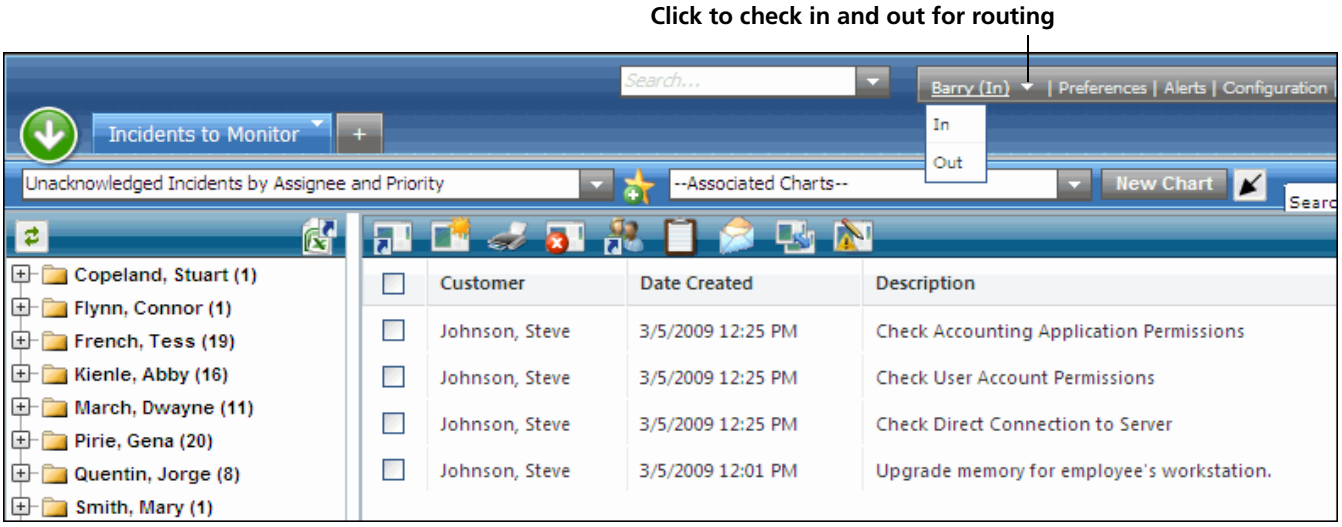
The following fields are searched:

Record Type	Fields Included in Global Search
Archived Incident	Description, Resolution, Number, Customer Name, Assignee Name, Company
Asset	Name, Comments, Owner, Tag Number, Serial Number
Change	Reason, Description, Results, Number, Customer Name, Assignee, Company
Company	Name, City, State
Customer	First name, Last Name, Customer ID, Company, EUD Login
FAQ	Topic Label, Question, Answer
Headline	Message, Details
Incident	Description, Resolution, Number, Customer Name, Assignee Name, Company, Short Description
Knowledge Entry	Problem, Resolution, Error Message, Solution Steps, Cause, Number
Problem	Short Description, Long Description, Root Cause, Workaround, Resolution, Number, Assignee
Product	Name, Description, Vendor
Purchase Request	Short description, Comments, Number, Recipient, Requested By, Bill To, Vendor

Using Options on the Function Bar

Specifying Availability

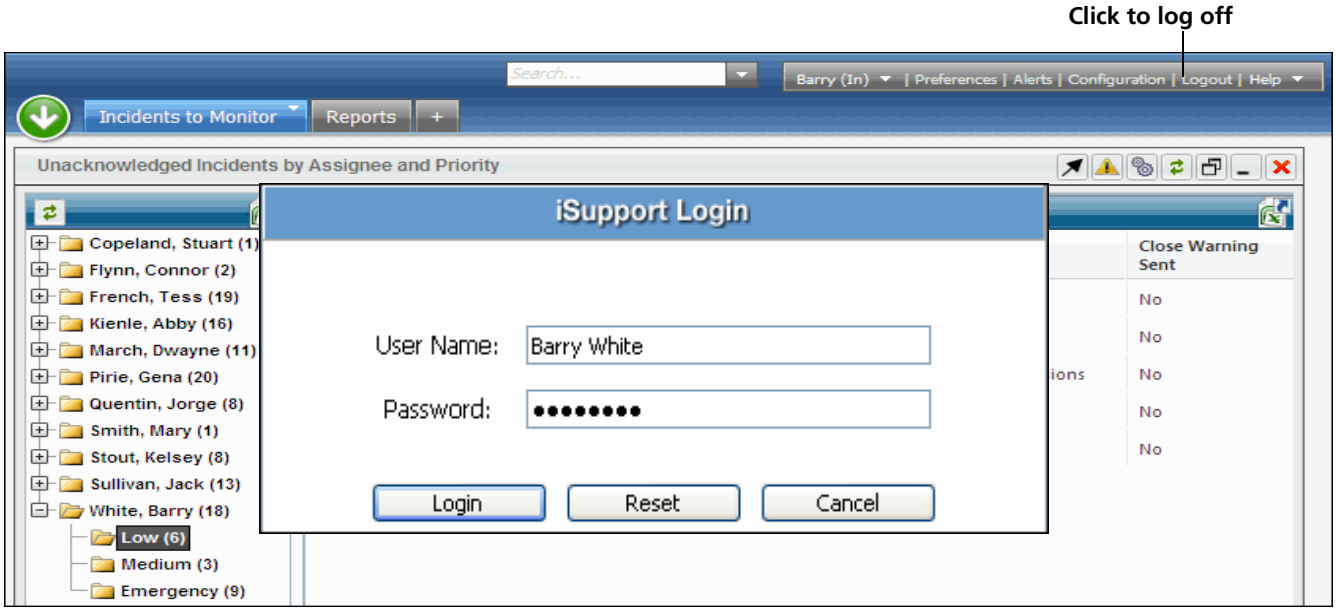
The first name in your login user name appears in the function bar in the upper right corner of the Desktop; click the dropdown to check in and out for incident, problem, and change (if enabled) routing.



Selecting Out will exclude (for routing purposes) the support representative from all of the groups in which the support representative is assigned. However, it will not prevent assignment if a support representative is the default owner of:
- incidents submitted via the End User Desktop
- an incident or change (if enabled) template, or
- email-submitted incidents.

Logging In and Out

Use the **Logout** link on the menu bar to log off of the Desktop and display the iSupport Login screen. (This link does not display if using Microsoft Windows-based authentication.)



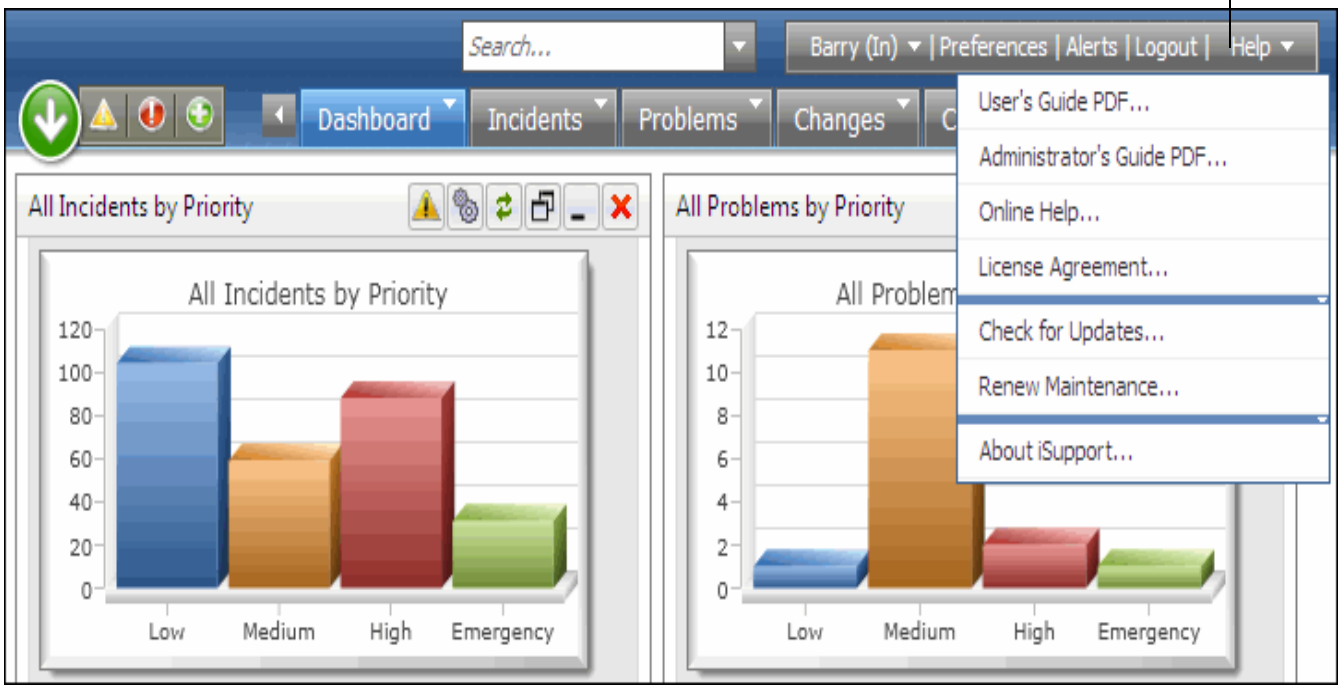
In the Login dialog, use the Reset button to clear the User Name and Password fields. Your user name and password are set up in your Support Representative Profile record, and you can change your password via the Preferences option.

The Password field in the Login dialog is case sensitive.

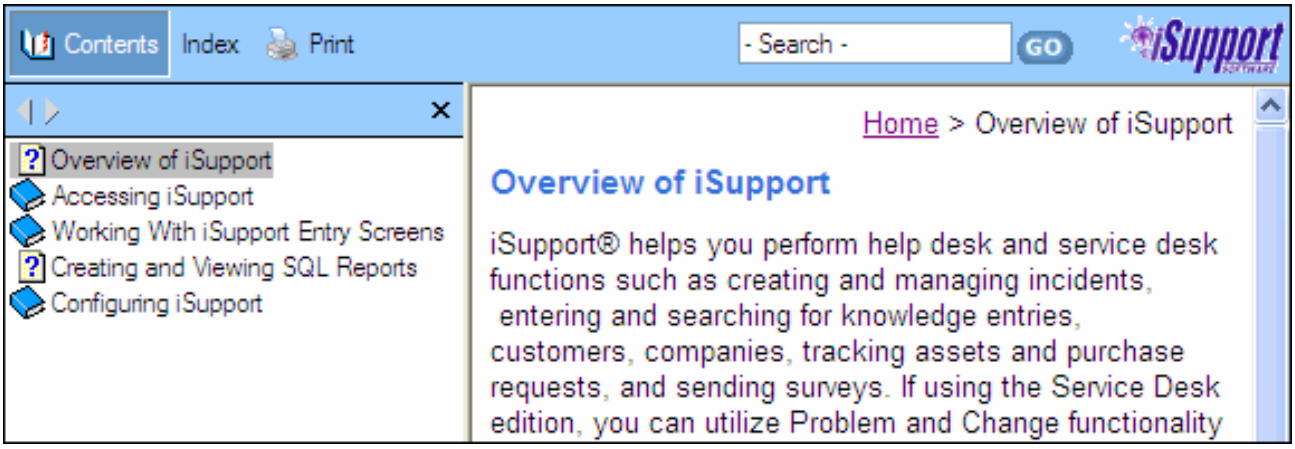
Accessing Documentation

Use the Help link to open a menu for accessing iSupport documentation, displaying the iSupport license agreement, and checking the version of your iSupport application.

Click to access the iSupport documentation, license agreement, and version



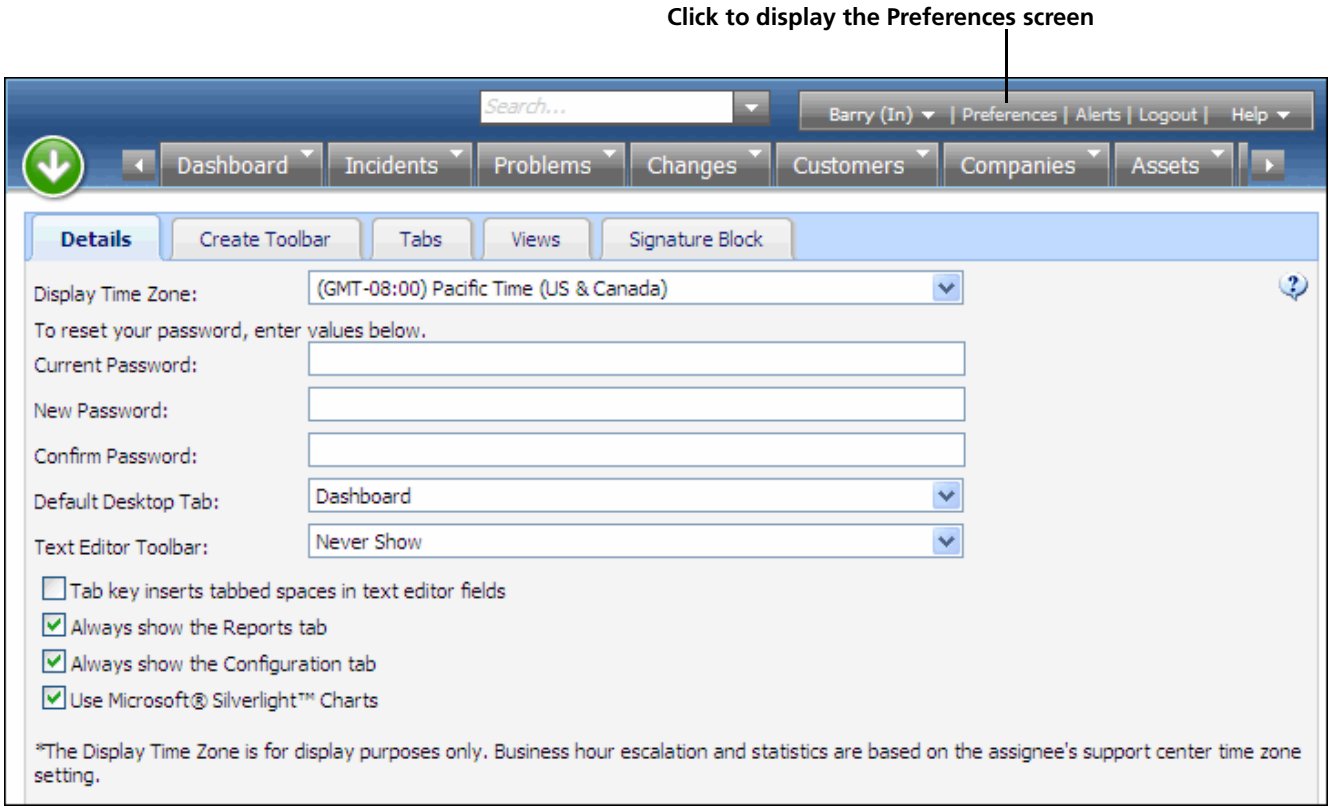
- The **User's Guide PDF** option displays this guide; the **Administrator's Guide PDF** option displays the *iSupport Administrator's Guide* pdf which contains information on configuring the iSupport application. Use Adobe Acrobat® Reader™ to view PDFs; to download a free copy of Adobe Acrobat® Reader™, go to www.adobe.com.
- Use the **Online Help** option to display a cross-browser online help system that includes overviews and context-sensitive help topics for iSupport. The help system is installed in the Help\CSH directory under the directory in which the Desktop is installed (\iSupport\RepClient by default).



You can click the Help icon to display a comprehensive help topic with information on the functionality in that screen.

Setting Preferences for the Desktop

Use the **Preferences** link to set display, password, tab, view, and signature block options for your Desktop.

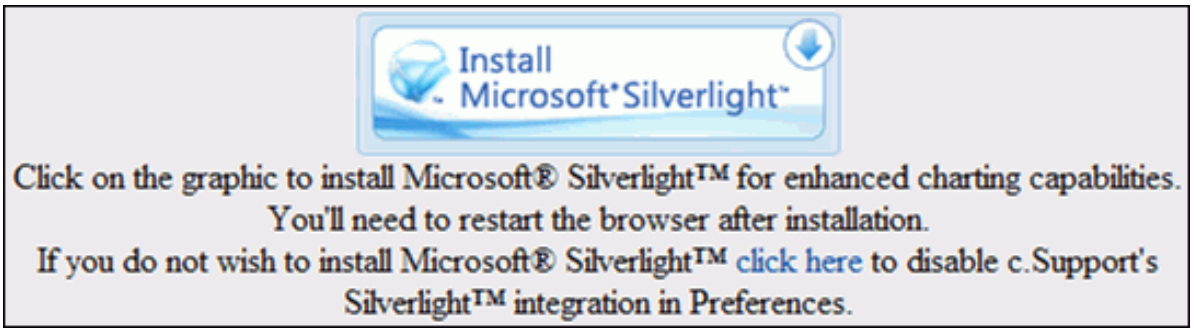


Setting Your Display Time Zone, Password, and Other Desktop Options

On the Details tab, you can:

- Select the display time zone to use for all date/time stamps. This is for display purposes only on your Desktop client; incident business hour escalation and statistics are based on the assignee's support center time zone setting.
- Change your password to log into iSupport. The new password will be updated in your Support Representative record.
- Use the **Default Desktop Tab** field to set the tab to display by default on the Desktop when you log in. Note that tabs can be set as default in the Support Representative Tabs screen in the Configuration module.

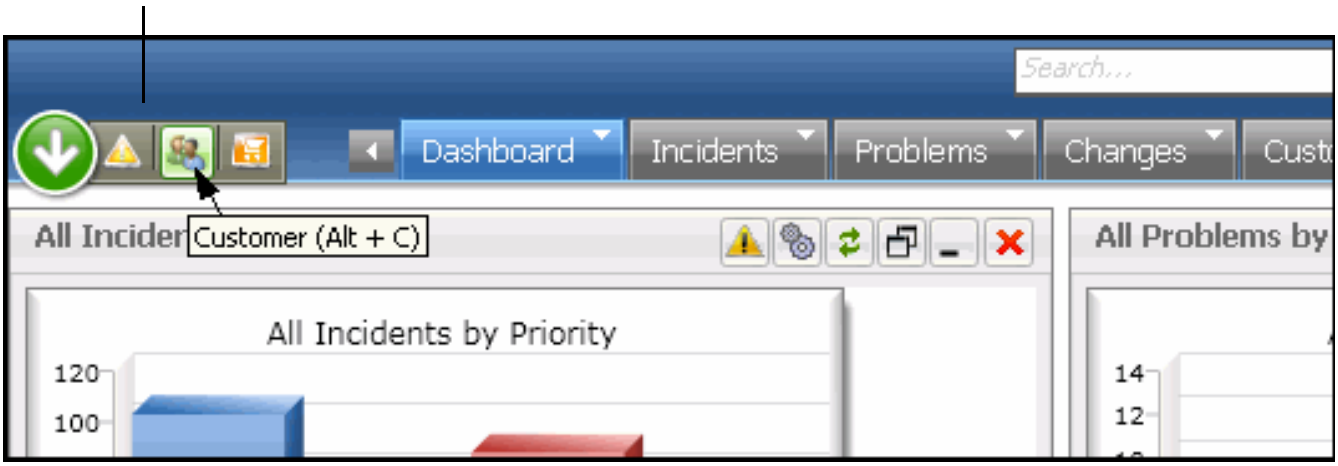
- Use the **Text Editor Toolbar** field to control whether to display the text editor toolbar when you place your cursor in a toolbar-enabled field (Popup), retain display of the toolbar over those fields (Always Show), or prevent display of the toolbar in those fields (Never Show). Note that if you select Never Show, you can still display the toolbar by clicking the field label link that displays a larger window.
- Select the **Tab Key Inserts Tabbed Spaces in Text Editor Fields** checkbox to enable the Tab key to insert spaces (instead of moving between fields) in fields with a text editor toolbar (such as the Issue Description and Issue Resolution fields). See "Using the Text Editor Toolbar" on page 58for more information on the text editor toolbar.
- Use the **Always Show the Reports Tab** option to retain the Reports tab on the Desktop tab bar for creating and viewing SQL reports.
- Use the **Always Show the Configuration Tab** option to retain the Configuration tab on the Desktop tab bar for accessing the iSupport Configuration module.
- If use of Silverlight Charts is enabled on the Functionality tab in Global Configuration, the **Use Microsoft® Silverlight™ Charts** field appears on the Details tab in the Preferences screen. Select this checkbox to utilize Microsoft® Silverlight™ for enhanced charting capabilities. Microsoft® Silverlight™ must be installed locally in order to utilize its capabilities; the following will appear if the Use Microsoft® Silverlight™ Charts fields are enabled but the Microsoft® Silverlight™ client is not installed:



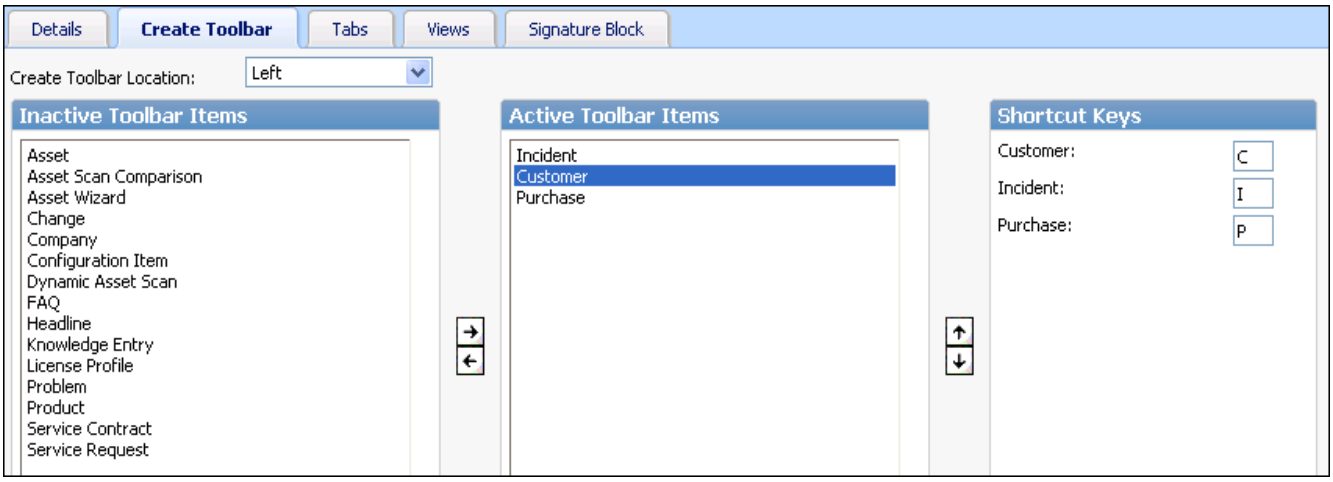
Configuring a Create Toolbar

Use the Create Toolbar tab to add a toolbar with icons for creating records.

Customizable Create Toolbar

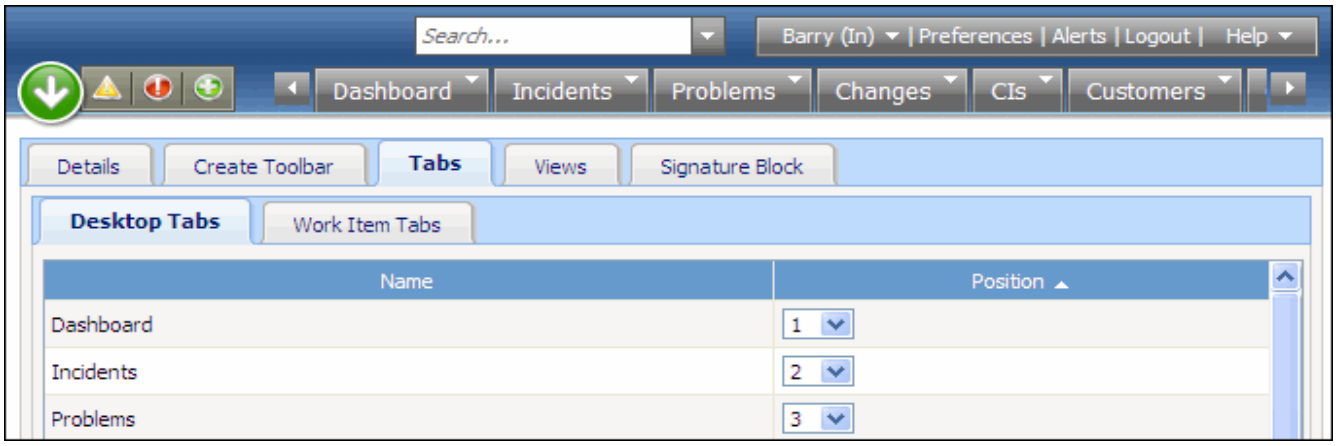


On the Create Toolbar tab in the Preferences screen, specify the position (left, right, or above the tabs) of the toolbar in the Create Toolbar Location field. In the Inactive Toolbar Items section, select the record types to include on the toolbar, and then click the .icon. In the Shortcut Keys section, assign an alphanumeric key (0-9 a-z) to each item. This key is used with the Alt key for Internet Explorer, Google Chrome, and Apple Safari, and it used with the Alt Shift keys for Mozilla Firefox.

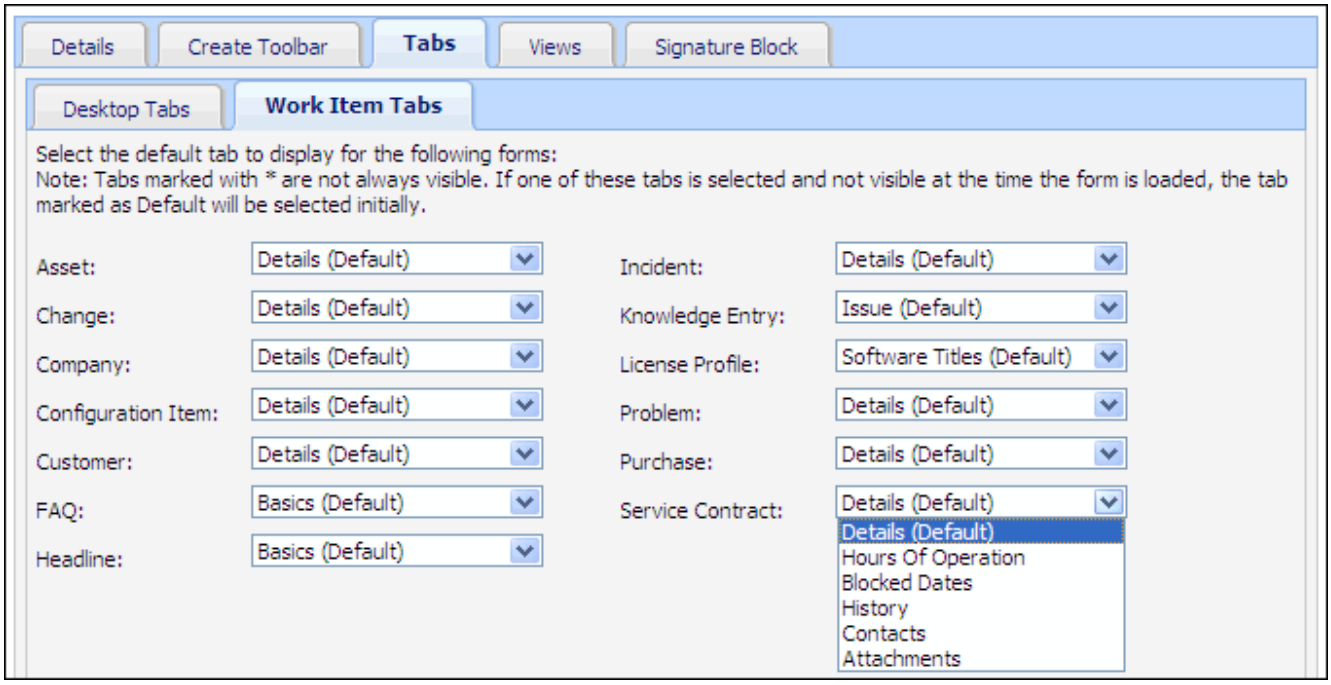


Reordering Tab Position

Select Tabs | Desktop Tabs to reposition the tabs on your Desktop; select the number for the position of the tab on the Desktop.



Select Tabs | Work Item Tabs to specify the tab to be enabled by default in each iSupport entry screen.

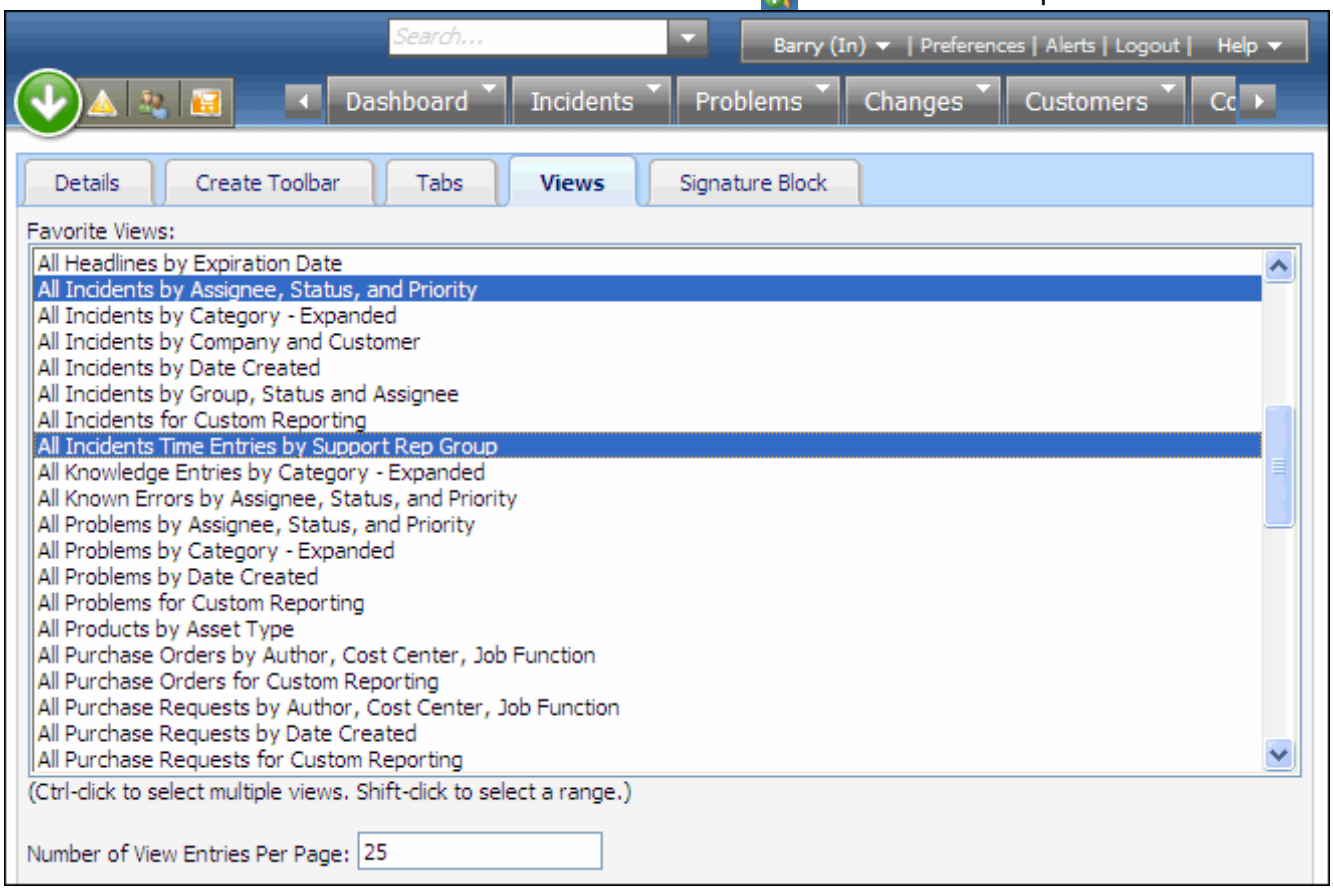


Designating Your Favorite Views

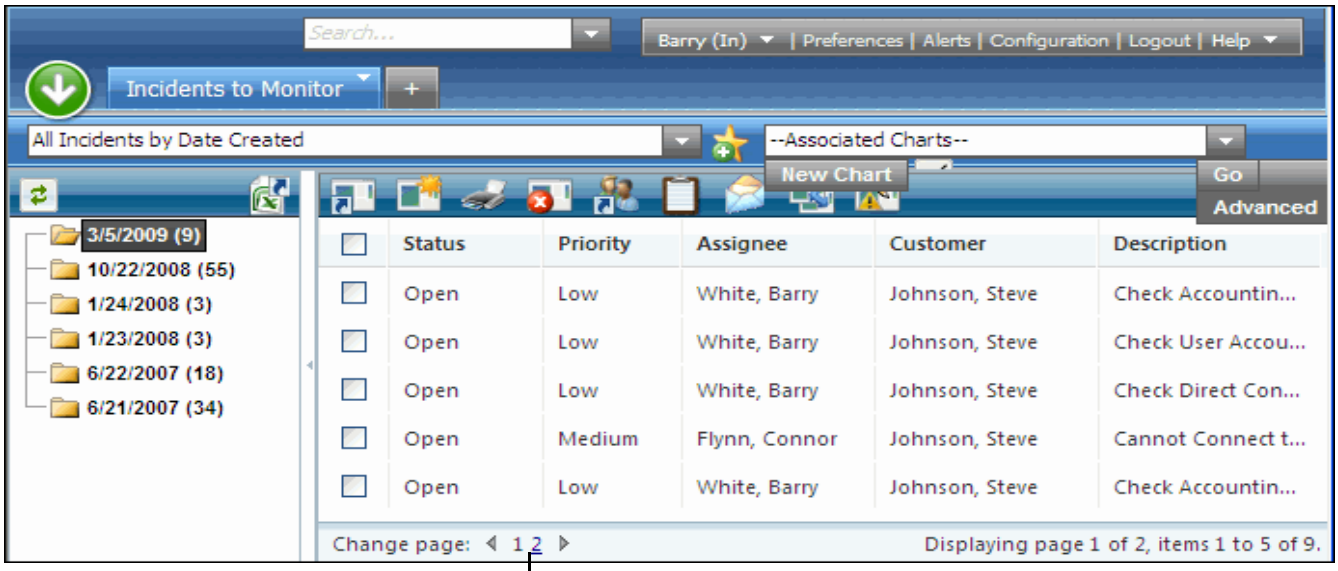
Use the Views tab in the Preferences screen to:

- Specify a set of favorite views; this list typically includes the views that you use most frequently. These views will appear in the Favorite Views folder at the top of the View dropdown list available in the View Designer, Chart Designer, Alert configuration, and tab content

configuration frame. To select multiple entries, hold down the Ctrl key and click on each entry. You can also add to this list via the Add to Favorites icon on a Desktop tab.



- Specify the number of entries to display at a time. When the number of entries exceeds the specified number of view entries per page, a set of view paging links appear at the bottom of the entries as shown below:



View paging links

You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page
- Press Alt < to jump back to the first page

Entering Your Signature Block

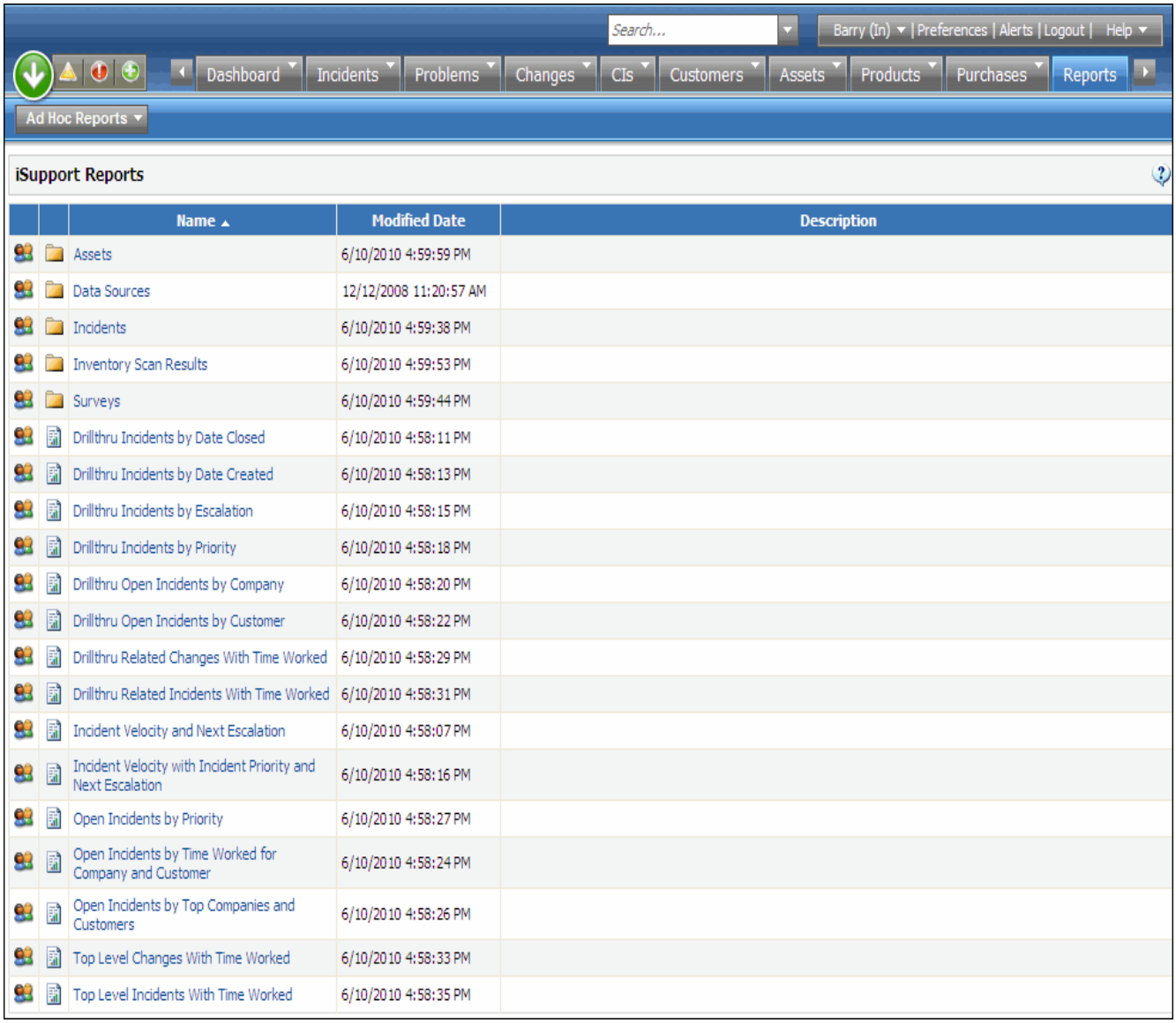
Use the Signature Block tab in the Preferences screen to enter text to append to all editable email that you send from iSupport.

The text editor toolbar appears when you place your cursor in the field or click the Signature Block link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information.

You do not need to enter blank lines before the text; two blank lines will be inserted before the signature block when a blank correspondence is initiated. If an editable correspondence template is selected in the Incident or Customer Profile screen, one blank line is inserted automatically before the signature block. You can edit the signature block text in the Correspondence screen if needed.

Creating and Viewing SQL Reports

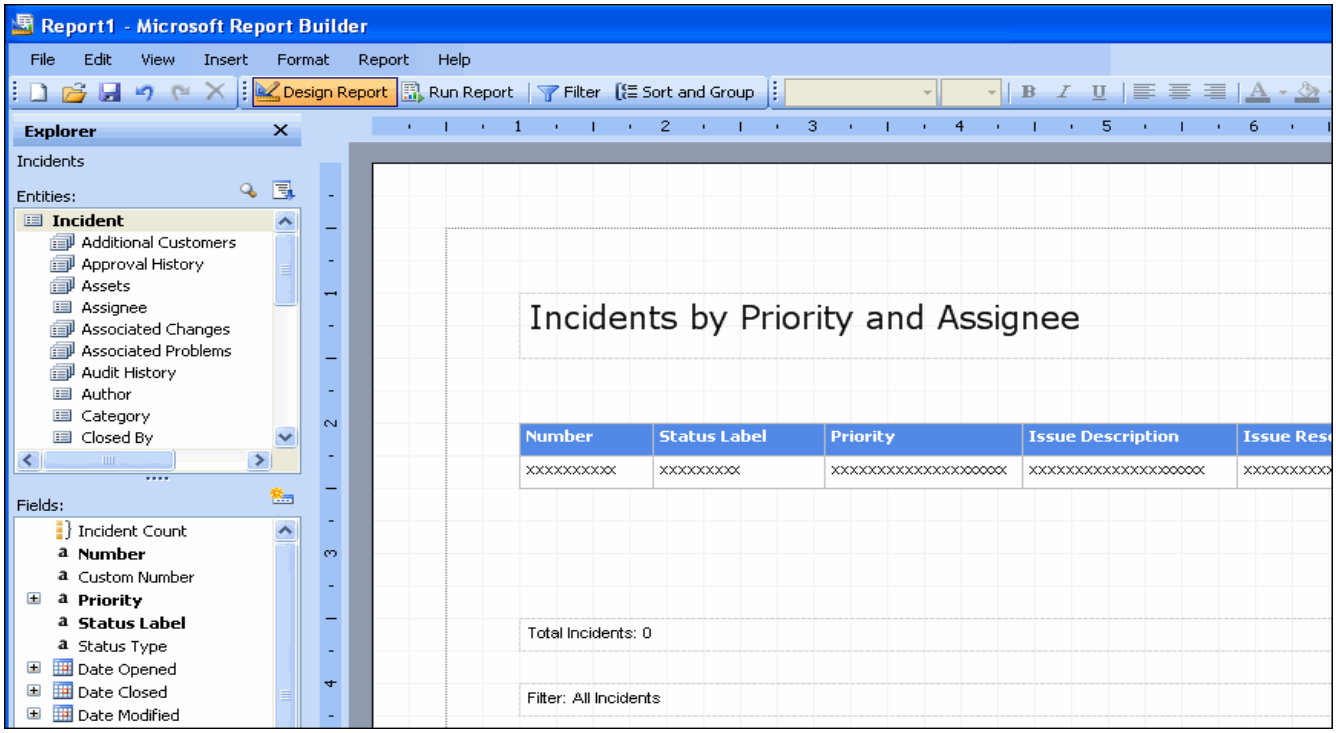
If Report Viewer permission is enabled in your Support Representative Profile record in iSupport, you can view SQL reports on the Desktop via the Reports tab or a Report Viewer frame on the Desktop. You can retain the Reports tab on your Desktop via an option in the Preferences screen.



Access to SQL-based iSupport reports and report folders can be restricted via group access permissions; if the Manage Folders and Reports permission is enabled in your Support Representative Profile record, the Group Access icon will appear next to the folders and reports on the iSupport Reports tab.

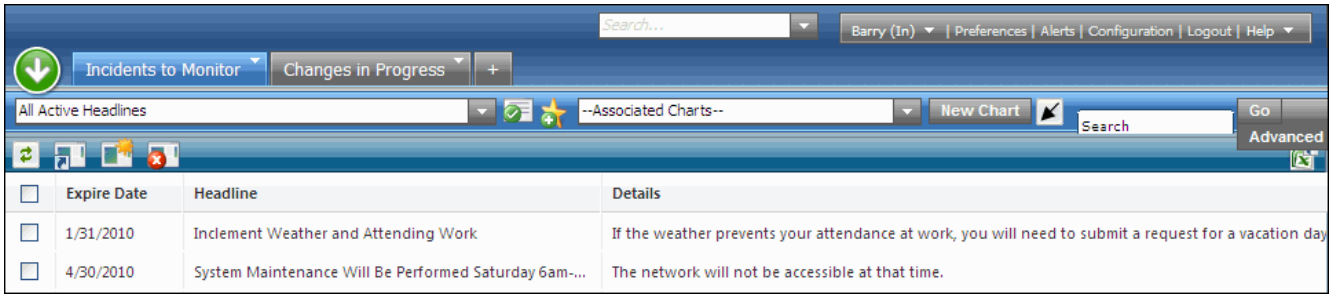
iSupport includes several report models for iSupport database fields, tables, and relationships. These models can be used to create ad hoc reports via Microsoft Report Builder or custom reports via Microsoft Report Designer. If you have iSupport's Ad Hoc Reports permission, you can access Microsoft Report Builder via the Desktop by selecting New Report on the Ad Hoc Reports menu on the Reports tab. (Note: This feature is not enabled for Express editions of Microsoft SQL Server.)

For more information, select Documentation on the Ad Hoc Reporting menu on the Desktop Reports tab.



Entering Headlines for the Desktop and End User Desktop

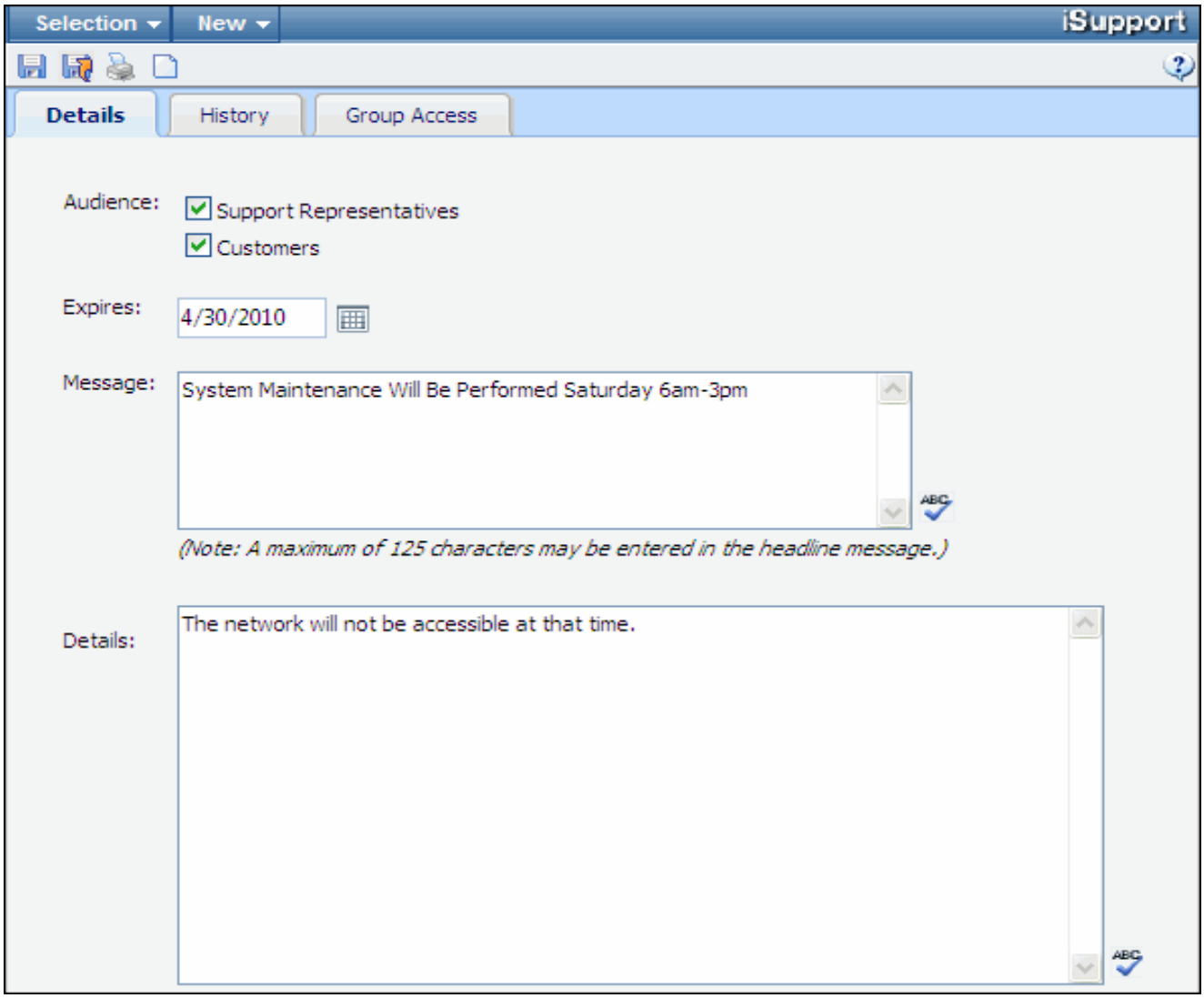
You can create informational headlines for display on the Desktop.



If configured, the headline can be included on the End User Desktop.

Entering Headline Basics

To access the Headline entry screen, select Headlines under Create on the Desktop action menu.

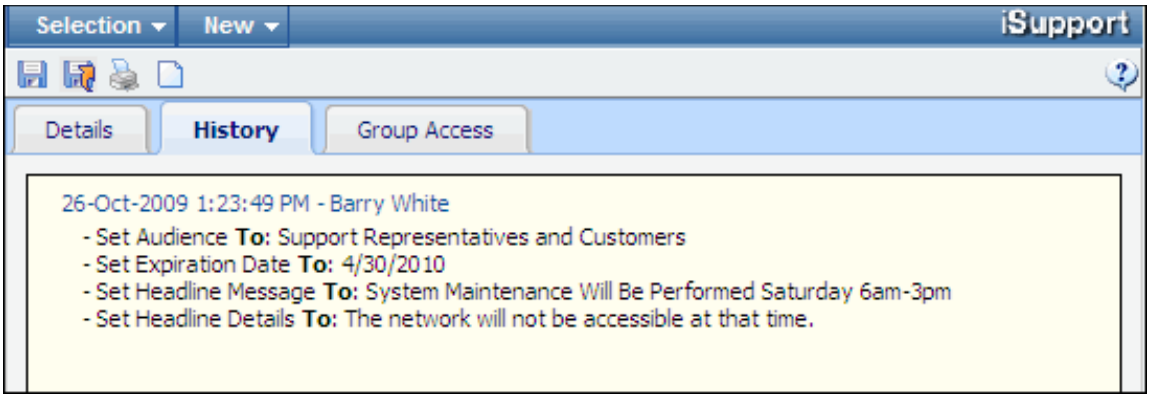


Field	Description
Audience	Select: ■ Support Representatives to display the headline only on the Desktop. ■ End Users to display the headline only on the End User Desktop (if a link is set up to access it).
Expires	Select the day on which the headline should no longer display. (The headline will not display on this day.)
Message	Enter the headline to display on the Desktop and/or End User Desktop. Headlines are limited to 125 characters. You can use HTML tags to format the text.

Field	Description
Details	Enter additional information to display on the Desktop and/or End User Desktop. You can use HTML tags to format the text.

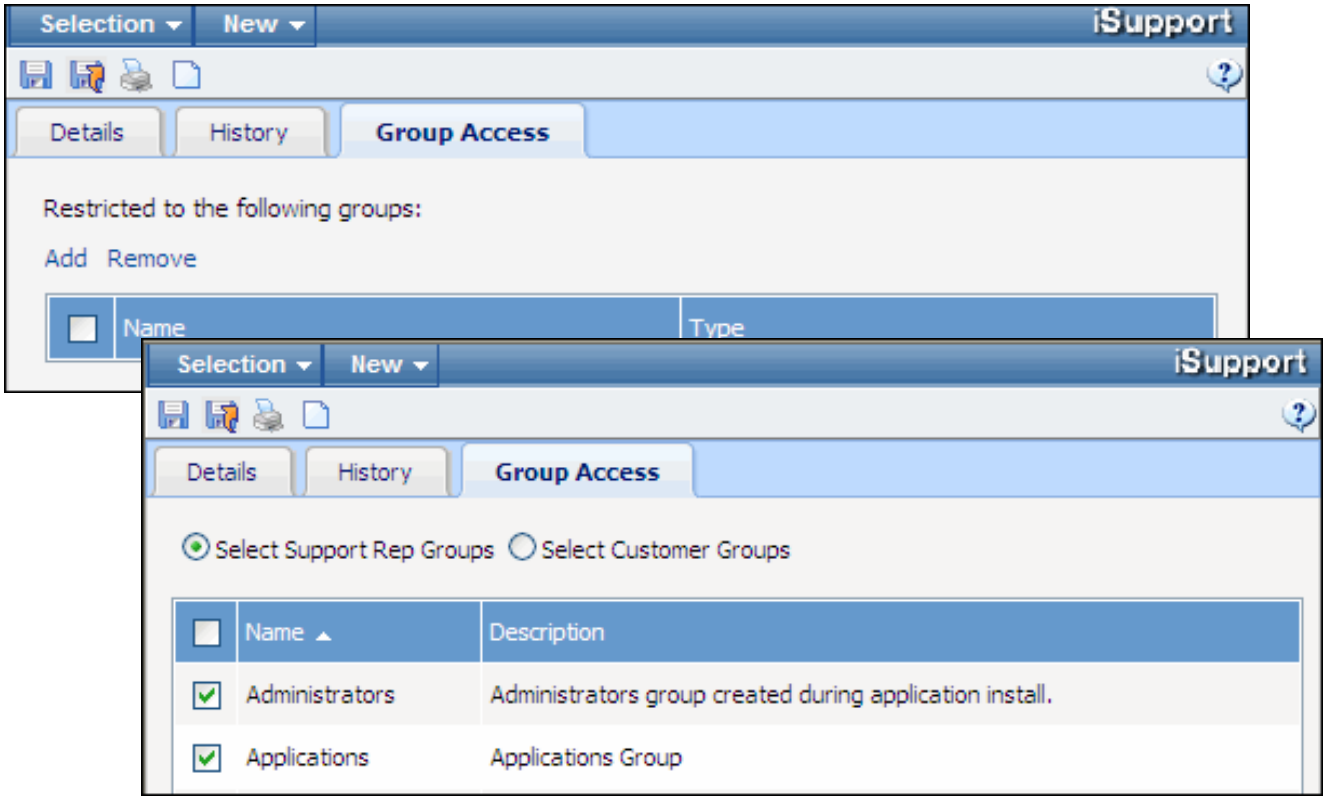
Viewing History

Use the History tab to view notations on all headline actions.



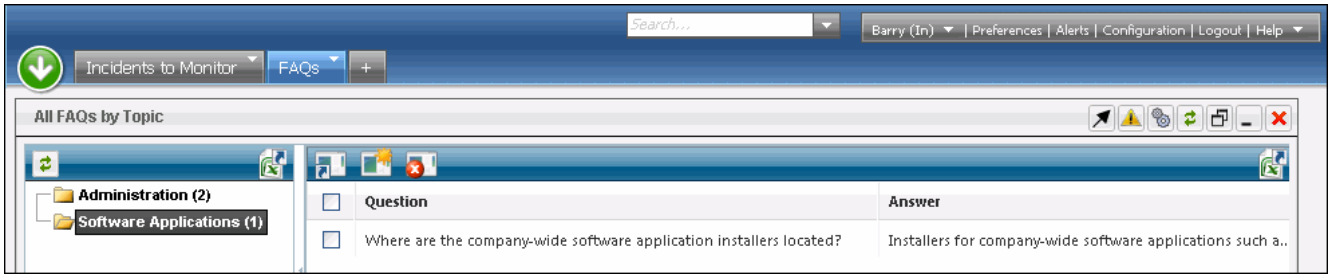
Restricting Access

Use the Group Access tab to restrict display of a headline to members of support representative and customer groups. Click the Add link to display the following dialog for selecting the groups. ***After you add one or more groups and save, the headline will display only to members of the selected groups.***



Entering FAQs

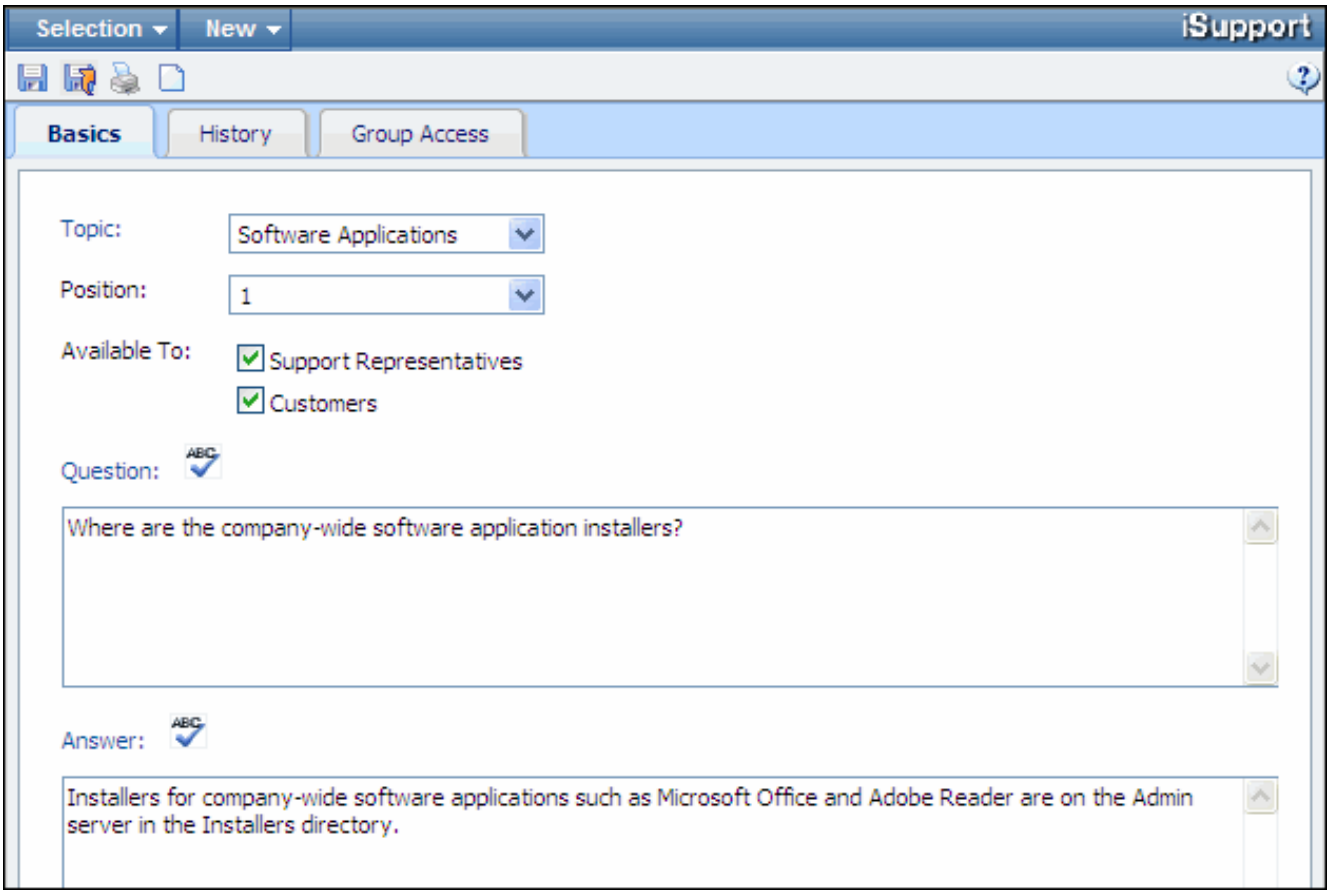
Frequently asked questions (FAQs) are informational documents in question and answer format. You can create topics to sort FAQs on the Desktop and End User Desktop.

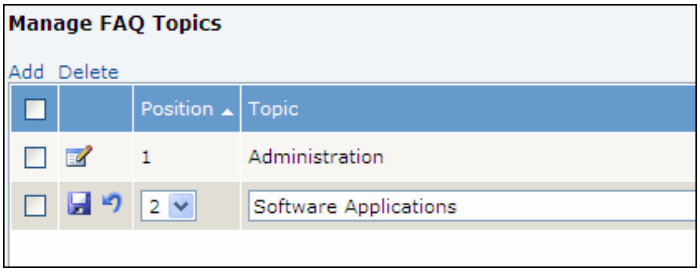


Customers can view frequently asked questions if you add a link on the End User Desktop.

Completing the Basics Tab

To access the FAQ entry screen, select FAQ under Create on the Desktop action menu.



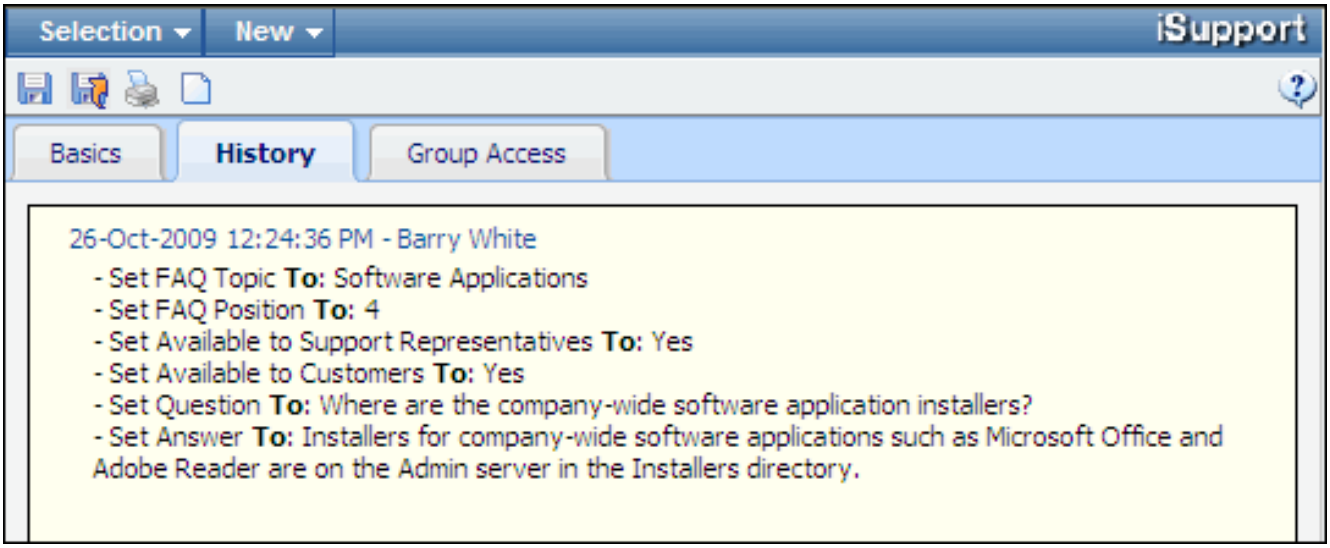
Field	Description
Topic	Select the topic under which the FAQ should be displayed on the Desktop and/or End User Desktop. If you select None, the FAQ will appear at the top of the FAQ topics. To enter a new topic, click the Topic link. In the Manage FAQ Topics dialog, click the Add link. Use the Position field to select the row number for the position of the topic on the End User Desktop; row one will be listed first, row two will be located under the first row, and so on. After making an entry, use the Save icon to save it or the Cancel icon to undo your entry. Use the Edit icon to modify an entry. 

Field	Description
Position	Select the row number for the position of the frequently asked question on the Desktop and/or End User Desktop. Row one will be listed first, row two will be located under the first row, etc.
Available To	Select one or both of the following: ■ Support Representatives to include the frequently asked question on Desktop. ■ End Users (Customers) to allow the frequently asked question to be used on the End User Desktop.
Question	Enter the frequently asked question. You can use HTML coding to format the text for display in the FAQ dialog from the Desktop.
Answer	Enter the answer to the frequently asked question. You can use HTML coding to format the text for display in the FAQ dialog from the Desktop.

To include a URL link in the question or answer, use the following format:
<A href="http://*domain*">http://*domain*/</A>
Example:
<A href="http://www.iSupport.com">http://www.iSupport.com/</A>

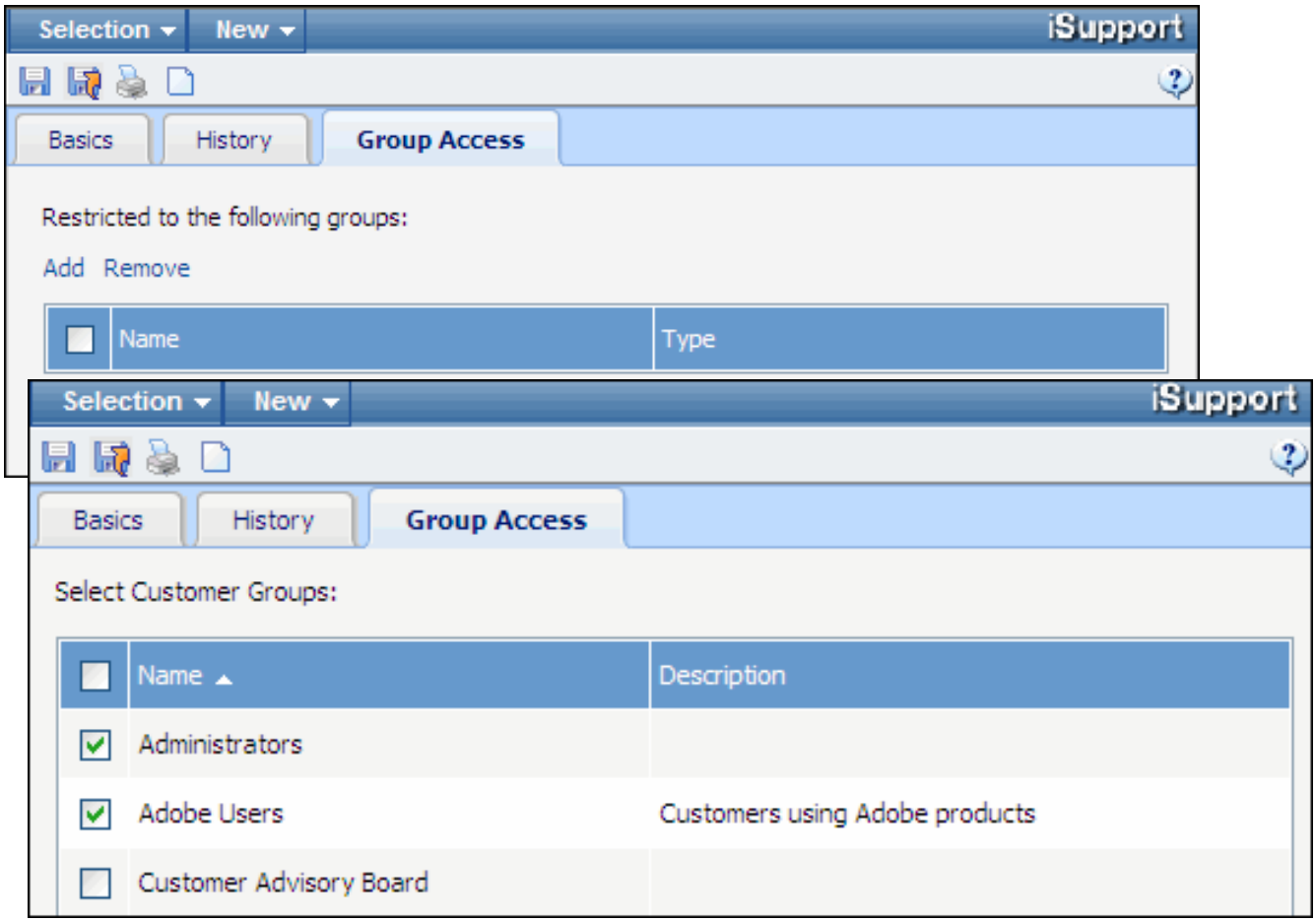
Viewing History

Use the History tab to view notations on all FAQ actions.



Restricting Access

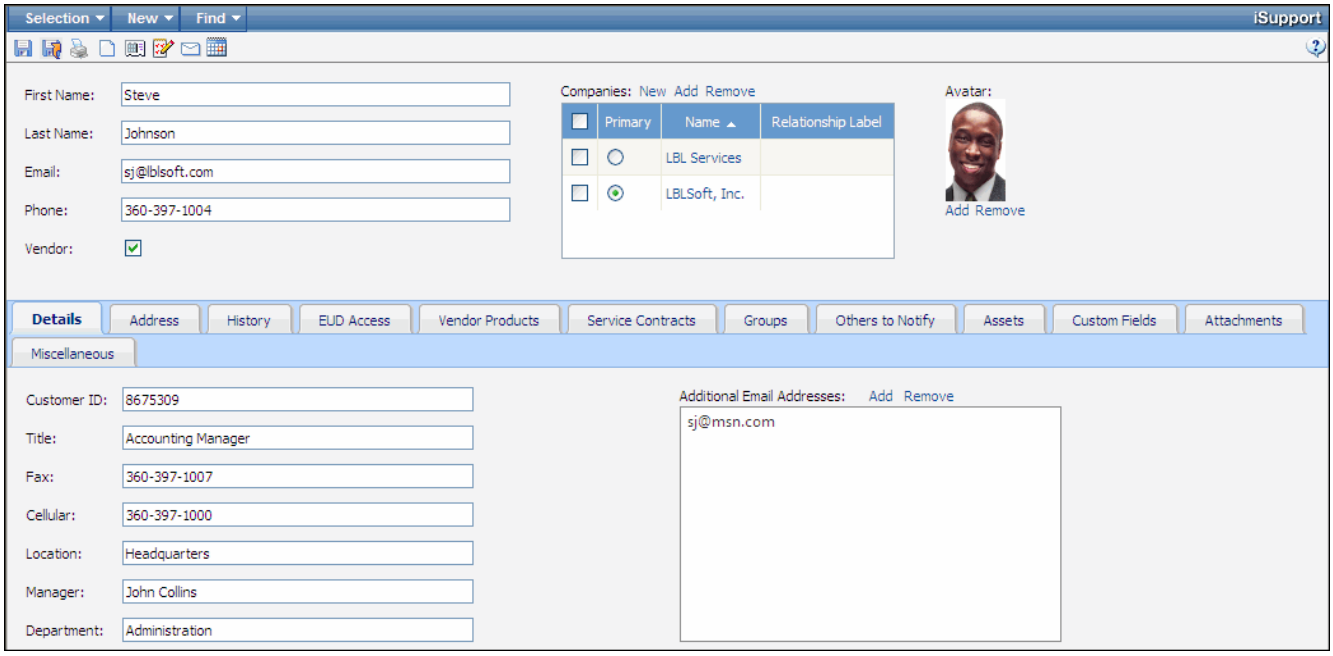
Use the Group Access tab to restrict display of a FAQ to members of customer groups. Click the Add link to display the following dialog for selecting the groups. ***After you add one or more groups and save, the FAQ will display only to members of the selected groups.***



3 Working with Customer Profiles

Overview

The Customer Profiles screen enables you to record customer information that can be used in all iSupport functionality.



Profiles Created by Customers Using the End User Desktop

A Customer Profile record can be created when a customer does the following from the End User Desktop:

- Uses the Register link to enter contact information and set up a login. This creates a Customer Profile record (if one does not already exist for the email address and login name). If the customer uses the Change Password dialog to change his/her password, it will be updated in the customer's Customer Profile record (unless Active Directory® integration is enabled.)
- Submits an incident and includes an email address that does not already exist in Customer Profiles.

A name may not be included in a Customer Profile record if the customer submitting an email incident does not have a profile record and does not have his/her name set up in their email application.

Customer Access to the End User Desktop

During iSupport configuration, an option may be set that requires customers to enter a user name and password in order to access the Submit Incident, View Incident, or template features on the End User Desktop. If authentication has been configured to be required for the entire End User Desktop, group-based customer access to the End User Desktop may be enabled.

Microsoft® Windows-based authentication can be set up to bypass the Login prompt for accessing the Submit Incident, View Incident, or template features. Each customer must have a Customer Profile record that includes his/her Microsoft® Windows user name (*domainname\username*).

If no authentication is configured to be required, a customer will need to enter an email address in order to submit an incident and use that email address to view incidents.

You can individually prevent access to the End User Desktop by clearing the Enable EUD Access checkbox on a customer's Customer Profile record.

Customer Groups

If you have the appropriate permissions set up in the configuration module, you can add a customer to one or more customer groups defined in the Configuration module. This enables you to:

- Send surveys and correspondence and report on incidents for a selected group of customers via the Desktop.
- Allow customers to view records via the End User Desktop for their associated groups. You can associate support representative locations for location-based routing of items submitted via the End User Desktop and email.
  - The location selected by the EUD customer takes precedence, then the support representative location associated with the customer's primary group, then the location associated with the company's primary group. If none is found, the default location specified in configuration is used.
  - For email-submitted tickets, the customer's profile will be searched for a primary group and associated support representative location. If there is no associated location, the customer's company record is searched for a primary group and associated location. If none are found, the location specified in configuration will be used.
  - Restrict access to headlines, FAQs, knowledge entries, and categories on the End User Desktop.

You can use the Groups tab in the Company screen to assign all of a company's current customers to a group. You can view customer group membership on the Desktop.

Others to Notify

If enabled in configuration, you can set up an Others to Notify list for a customer for use in sending correspondence and incident, problem, purchase request, and change (if enabled) notifications to those not directly involved in the process. For example, you could select a salesperson to be notified whenever an incident is created for one of their accounts. An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual record.

Service Contracts

If Service Contract functionality is enabled in configuration, you can use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe).

Associated Configuration Items

If you have the Service Desk edition, Configuration Management Database (CMDB) functionality enables you to display, report on, and send correspondence regarding the assets, services, and other resources that are crucial to your organization's operation and the relationships between those items. A CMDB contains configuration items (CIs) for the resources to be tracked and the relationships between those items. You can associate a predefined configuration item with a customer profile, and utilize the data on the associated customer profile for views, reports, and correspondence. For example, you can send a correspondence with information from the associated customer profile or customer group from the Configuration Item screen.

The associated customer profile and customer group feature is enabled for a CMDB type in the CMDB Type Configuration screen, and the association is performed in Customer Profile or Configuration Item screen. See "Working with Configuration Items" on page 403 for more information on CMDB functionality.

Outlook Calendar Access

If configured, a New Meeting icon will appear in the Customer Profile screen for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules of meeting attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent. See "Accessing Outlook Calendar" on page 143 for more information.

Service Level Agreements

Service level agreements (SLAs) monitor incidents and changes and send notifications regarding status.

- If priority-based escalation is enabled and an incident or change remains at a certain priority level without closure for a period of time longer than a specified time limit, the incident or change escalates to the next (higher) priority level.
- If reassignment-based escalation is enabled and the original assignee does not close the incident or change within a defined period of time, it will be automatically reassigned to a support representative in a group or a support representative with skill associated with the incident or change categories.

SLAs can also notify managers, customers, and/or support representatives when an incident or change is created, routed, escalated, or closed. SLAs and escalation settings are set up in the Configuration module.

Custom SLA settings can be used to define various levels of service; for example, a set of tighter thresholds can be set for premier customers and a set of more generous thresholds can be set for other customers. Custom SLA settings can be assigned to incident and change templates, categories, customers, and companies. The order in which SLAs are applied to incidents and changes is as follows:

- If the configured winner of a category and customer SLA conflict is set to Customer:
  - Incident or change created; default SLA applied.
  - The customer and customer's company are checked for custom SLAs; if both have a custom SLA, the customer's custom SLA is always applied. In the absence of a customer custom SLA or company custom SLA, if the categorization has a custom SLA, it is applied.
  - If an incident or change (if enabled) template is applied and it has a custom SLA, it will override any other SLA.
- If the configured winner of a category and customer SLA conflict is set to Category:
  - Incident or change created; default SLA applied.
  - If the categorization has a custom SLA, it is applied. In the absence of a categorization custom SLA, the customer's company and customer are checked for custom SLAs; if both have a custom SLA, the customer's custom SLA is always applied.
  - If an incident or change template is applied and it has a custom SLA, it will override any other SLA.

Consult with your administrator regarding escalation time frames in order to understand how quickly incidents and changes must be resolved.

The *iSupport Administrator's Guide* contains information on setting up service level agreements and escalation.

If permissions are enabled during configuration, you may not be able to create a new Customer Profile record, view, edit, or delete an existing Customer Profile record, or change the EUD access or password.

Customer Data Source Integration

iSupport can integrate with Microsoft Active Directory®, an LDAP source, Microsoft® Business Solutions Customer Relationship Management (CRM), Domino Directory, and/or a Microsoft SQL Server database as a source of customer information.

All integration features are set up in the Configuration module. The *iSupport Administrator's Guide* contains more information.

Active Directory Integration

iSupport's Active Directory® integration enables an agent that updates the records in iSupport Customer Profiles with the information in one or more Active Directory sources. This synchronizes the data in iSupport Customer Profiles with the data in Active Directory. After this synchronization, authentication with the End User Desktop can occur. If enabled, the following occurs when the agent runs:

- If there is an entry in Active Directory that does not exist in Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Active Directory, it must contain a first name, last name, and email address. If a login name exists in the Active Directory record, it will be included in the EUD User Name field for authentication to the iSupport End User Desktop. Active Directory integration will need to be disabled in order for the password to be entered or changed. The password will not be changed by re-enabling Active Directory integration.
- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, depending on the configured order of precedence, the Customer Profiles record is updated with the latest information from Active Directory. If a Customer Profile entry has already been synchronized with Active Directory, the Last Modified dates are compared and the Customer Profile is updated with the latest information.
- If an entry is deleted in the Active Directory, the record will be flagged for deletion and:
  - If incidents are **not** associated with that name, the entry will be deleted from Customer Profiles when the Database Maintenance agent runs.

- If incidents are associated with the name, the entry will remain flagged for deletion in Customer Profiles until those incident records no longer exist.

The interval at which the agent runs is set up in the Configuration module. The Active Directory Integration feature does not modify the contents in Active Directory in any way.

If a Customer Profile record has been synchronized with Active Directory, the synchronized fields (except for Secondary User Name) cannot be edited in the Customer Profiles screen. These fields can only be edited via Active Directory.

The *iSupport Administrator's Guide* contains information about setting up iSupport's Active Directory Integration and End User Desktop authentication features.

LDAP Integration

The LDAP integration feature enables an agent that, based on the email address and first and last name, updates the records in iSupport Customer Profiles with the information in one or more LDAP sources such as e-Directory. This synchronizes the data in iSupport Customer Profiles with the data in the LDAP source. After this synchronization, authentication with the End User Desktop can occur. If enabled, the following occurs when the agent runs:

- If there is an entry in the LDAP source that does not exist in Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from the LDAP source, it must contain a first name, last name, and email address. If the Enable EUD Access for Auto-Created Customer Records field is enabled on the LDAP tab in the Directory Integration Configuration screen, the Approved to Access EUD field will be enabled on the automatically-created Customer Profile record.

  If a Windows login name exists in the LDAP source record, it will be included in the EUD User Name field for authentication to the iSupport End User Desktop. You'll need to disable the LDAP integration in order to enter or change the password for accessing the EUD. The password will not be changed by re-enabling LDAP integration.

- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, depending on the configured order of precedence, the Customer Profiles record is updated with the latest information from the LDAP source. If a Customer Profile entry has already been synchronized with the LDAP source, the Last Modified dates are compared and the Customer Profile is updated with the latest information.

- If an entry is deleted in the LDAP source, the record will be flagged for deletion and:

  - If incidents are **not** associated with that name, the entry will be deleted from Customer Profiles when the Database Maintenance agent runs.

  - If incidents are associated with the name, the entry will remain flagged for deletion in Customer Profiles until those incident records no longer exist.

If a Customer Profile record has been synchronized with the LDAP source, the synchronized fields (except for Secondary User Name) cannot be edited in the Customer Profiles screen. These fields can only be edited via the LDAP source.

When the feature is enabled, the agent runs immediately and then on an interval basis according to the selection in the LDAP Synchronization field. The LDAP Integration feature does not modify the contents in the LDAP source in any way.

Microsoft® CRM Integration

iSupport's Microsoft Business Solutions Customer Relationship Management (CRM) Integration feature enables an agent that updates the records in iSupport Customer Profiles with the information in Microsoft CRM.

- If there is an entry in Microsoft CRM that does not exist in iSupport Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Microsoft CRM, it must contain a first and last name and email address.
- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, the Customer Profiles record is updated with the latest information from Microsoft CRM. If a Customer Profile entry has already been synchronized with Microsoft CRM, the Customer Profile is updated with the latest information.
- If an entry is deleted in the Microsoft CRM:
  - If incidents are **not** associated with that name, the entry will be deleted from Customer Profiles when the CRM Synchronization agent runs.
  - If incidents are associated with the name, the entry will remain flagged for deletion in Customer Profiles until those incident records no longer exist.

If a Customer Profile record has been synchronized with Microsoft CRM, the synchronized fields cannot be edited in the Customer Profiles screen. These fields can only be edited via Microsoft CRM.

iSupport's Microsoft Business Solutions Customer Relationship Management (CRM) Integration feature is set up in the Configuration module. The Microsoft CRM Integration feature does not modify the contents in Microsoft CRM in any way.

The *iSupport Administrator's Guide* contains more information about setting up Microsoft CRM integration.

Domino Directory Integration

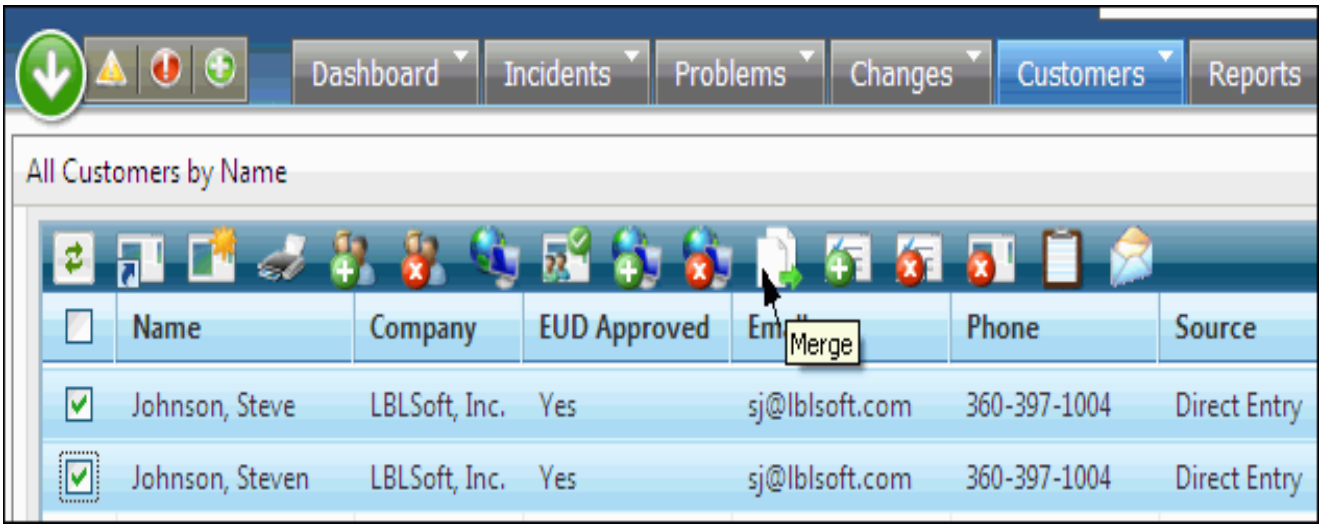
iSupport's Domino Directory integration enables an agent that updates the records in iSupport Customer Profiles with the information in a specified IBM Lotus®/Domino™ Directory (previously termed "NAB"). (Note: The customer's login information cannot be populated.)

Integration With Other Remote Databases

iSupport's Remote Database integration enables an agent that updates the records in iSupport Customer Profiles with the information in a specified Microsoft SQL Server database that contains customer data.

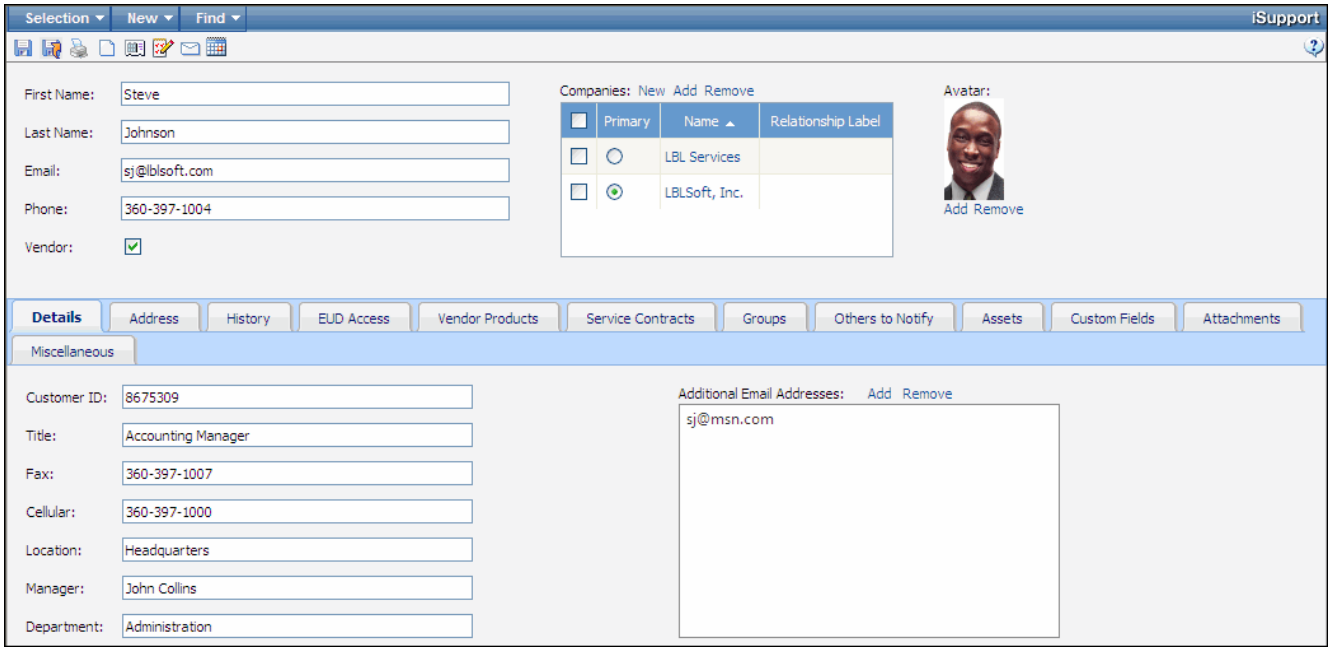
Merging Customer Profiles

Use the Customer/Company Merge feature if you wish to consolidate multiple Customer or Company Profile records; for example, if multiple Customer Profile records have been created for the same person or multiple companies have merged. From a customer or company view, you'll select a master containing some or all of the data you wish to use, as well as other profiles that you wish to consolidate. (Note that selected profiles other than the master will be deleted after the merge.) See "Merging Customer Profiles" on page 149 for more information.



Entering Customer Profiles

To access the Customer Profile screen, select Create | Customer on the Desktop action menu.



Field	Description
First Name Last Name	Enter the customer's name. These fields are required in order to save the record. When an incident is created for the customer, this information will display.
Email	Enter the customer's email address. This is a required field. When an incident is created for the customer, this information will display. If enabled, notifications will be sent to this address. Note: each customer profile must have a unique email address/first name/last name combination.
Phone	Enter the customer's telephone number. When an incident is created for the customer, this information will display.
Company	This field appears if the Related Companies feature is disabled in configuration. Click the Company link to select an existing company or enter a new company name. When an incident is created for the customer, this information will appear. To enter complete company information, access the Company screen from the Desktop. Note that the primary company cannot be changed on Customer Profile records with an active synchronization source.
Vendor	Select this checkbox to designate the customer as a vendor, which enables association with Product records for use in purchase requests. This also enables the Vendor Products tab to appear below the End User Desktop Access tab in the Customer Profile screen.

Field	Description
Companies	This field appears if the Related Companies feature is enabled in configuration. Select the companies associated with the customer; these companies will display for selection in the Select Customer dialog in the Incident, Change, and Purchase Request screens.
Avatar	Click the Browse button to select a picture to associate with the customer. This picture will appear on the Approvals tab in the Incident, Change, and Purchase Request screens if the customer is an approver in an approval cycle.

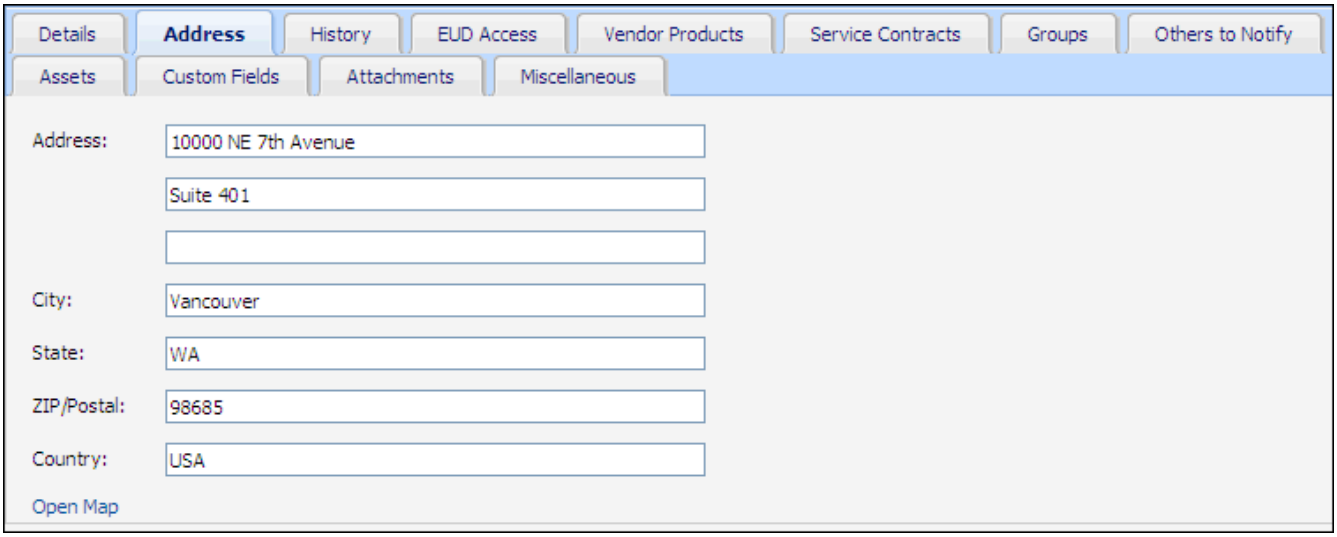
Entering Details

Use the Details tab to enter miscellaneous information about the customer.

Customer ID	Enter an identification number for the customer.
Title	Enter the customer's title.
Fax	Enter the customer's fax number. This number is used for reference.
Cellular	Enter the customer's cellular telephone number.
Location	Enter the location in which the customer works. When an incident is created for the customer, this information will display.
Manager	Enter the customer's manager. This information is used for reference.
Department	Enter the department in which the customer works. When an incident is created for the customer, this information will appear.
Additional Email Addresses	Click the Add link to enter additional email addresses for email-submitted processing. The address in the Email field (upper left corner of this screen) in all Customer Profile records will be checked first in the search for a matching Customer Profile; if there is no match the additional email addresses will be checked.

Entering Address Information

Use the Address tab to enter the customer's address. This information is used for reference purposes. You can click the Open Map link to search Google Maps® using the specified address, city, state, and ZIP/Postal code. This functionality requires an Internet connection.



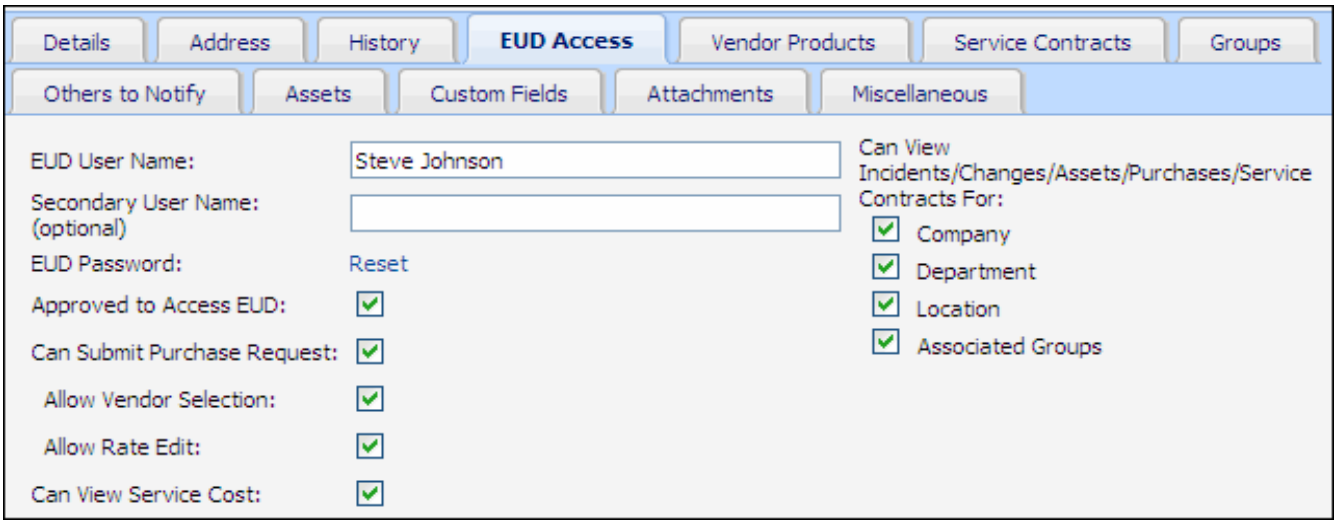
Field	Description
Address	Enter the customer's street address or post office box.
City	Enter the city in which the customer is located.
State	Enter the state in which the customer is located.
ZIP/Postal	Enter the ZIP code or postal code for the customer's address.
Country	Enter the country in which the customer is located.

Viewing Audit History

After you save a Customer Profile record, an entry appears on the Audit History tab. This tab includes a notation of every action performed on the record with the date, time, and author stamp.

Setting Up End User Desktop Access

Use the End User Desktop Access tab to set up the customer's login and access for the End User Desktop.



Field	Description
EUD User Name	Enter the customer's user name for logging into the iSupport End User Desktop. If using Microsoft® Windows-based authentication with iSupport to bypass the Login prompt for viewing records, enter the customer's complete Microsoft® Windows user name as follows: *domainname\username*. If using iSupport's Active Directory® integration, this field may be populated during synchronization.
Secondary User Name (optional)	If applicable, enter another user name for logging into the iSupport End User Desktop. If using iSupport's Active Directory integration, the initial synchronization process will populate this field. For ease of entry, it is approximated by: ■ Retrieving the text between the @ symbol and the next period from the user's principal name and converting it to upper case (for example, LBLSOFT would be retrieved from john@lblsoft.com) and adding a backslash ■ Retrieving the *username* portion from the samAccountName field of an AD user entry Because this login may be different if there are multiple domains, this field will be editable and will not be synchronized again after the initial synchronization. Note: This field is not applicable to Microsoft® CRM integration.

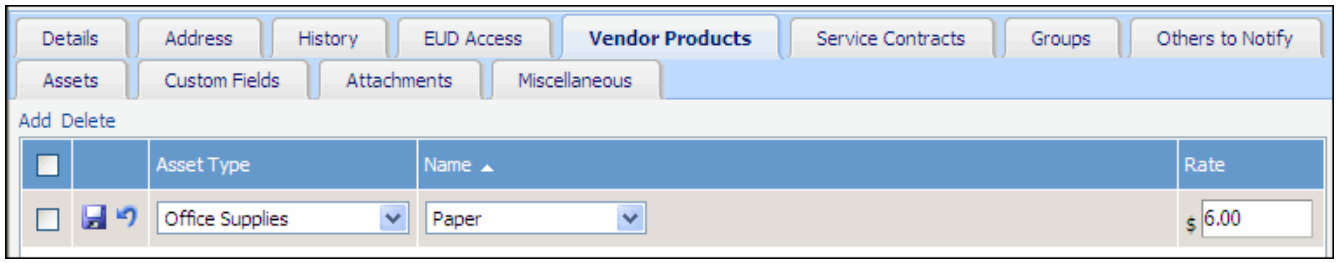
Field	Description
EUD Password	If you are *not* using iSupport's Microsoft® Windows-based authentication or Active Directory® integration, click this link to enter the customer's password for logging into the iSupport End User Desktop. This password will apply to both the EUD User Name field and the Secondary User Name field. If the Change Password is configured to be included on the End User Desktop, the customer can change their password and it will be updated in this field.
Approved to Access EUD	Select this checkbox to enable the customer to log in to view incidents or change his/her password on the End User Desktop. Clear this checkbox if you wish to prevent the customer from logging in to the End User Desktop.
Can Submit Purchase Request	Select this checkbox to enable the customer to submit a purchase request via the End User Desktop.
Allow Vendor Selection	Select this checkbox to enable the customer to select a vendor when selecting product line items for purchase requests via the End User Desktop.
Allow Rate Edit	Select this checkbox to enable the customer to change a line item rate on a purchase request submitted via the End User Desktop.
Can View Service Cost	Select this checkbox to enable the cost configured for service catalog entries to display on the End User Desktop Service Catalog screen for the customer. You can enable this permission for multiple customers via the Add Can View Service Cost Permission icon on customer views on the iSupport Desktop.
Can View Incidents/ Changes/Assets/ Purchases/Service Contracts For: Company Department Location Associated Groups	Select the appropriate checkbox to enable the customer to view (via the End User Desktop) the incidents, changes, assets, purchase orders, and/or service contracts for all customers with a matching company, department, location, or with matching associated groups in their Customer Profile record.

End User Desktop view permissions are cumulative; for example, if you select both the Allowed to View All Incidents/Changes/Assets/Purchases For This Location and the Allowed to View All Incidents/Changes/Assets/Purchases For Associated Groups checkboxes, the customer will be able to view the incidents, changes, and assets of all customers with matching locations *and* groups in their Customer Profile record.

Associating Vendor Products

This tab appears if you have the Service Desk edition and the customer has been designated as a vendor via the Vendor checkbox on the Details tab. When vendor products are associated with a customer, the products are available for selection on purchase requests. Products can also be associated with customer vendors in the Product screen.

Click the Add link to associate products with this customer. After making an entry, use the Save icon to save it or the Cancel icon to undo your entry. Use the Edit icon to modify an entry

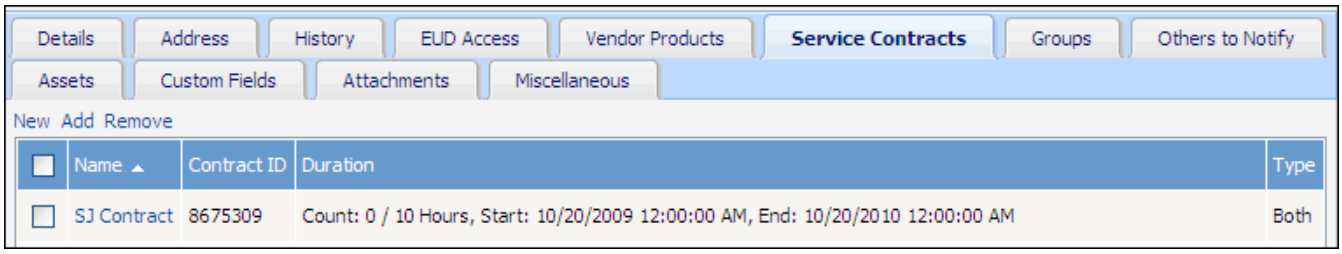


Field	Description
Asset Type	Select the predefined asset type for the product to be associated with this customer vendor.
Name	Select the product to be associated with this customer vendor.
Rate	Enter the cost of the product to be multiplied by the quantity entry for a line item in the Purchase Request screen.

Associating Service Contracts

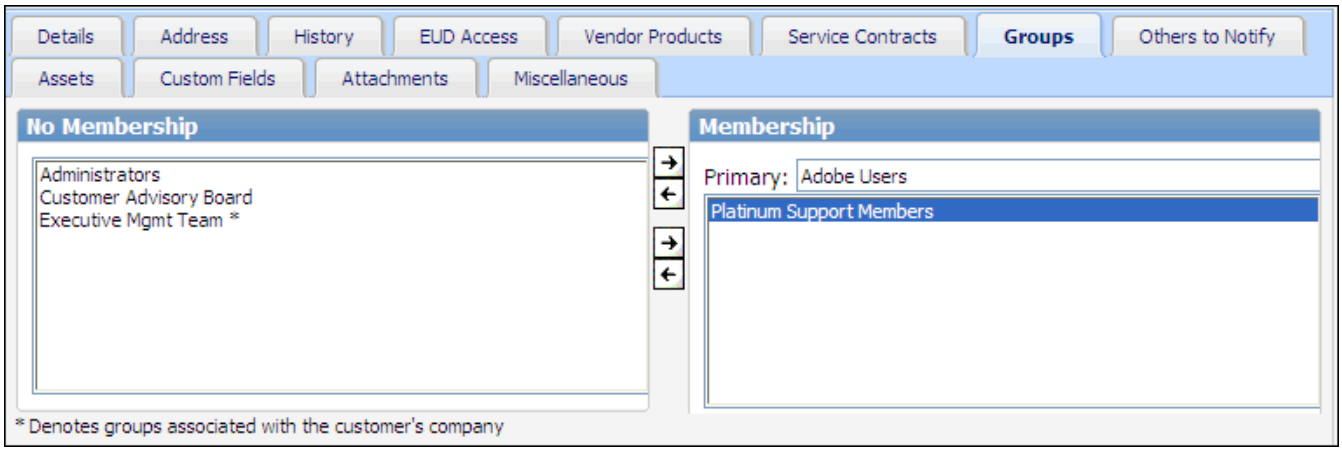
This tab appears if Service Contract functionality is enabled in configuration. Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe).

In the Service Contracts tab, click the New link to create a new service contract and assign it to the customer, click the Add link to assign the existing contract to the customer, or click the Remove link to remove the assignment. See "Working with Service Contracts" on page 459 for information on creating service contracts.



Assigning to Customer Groups

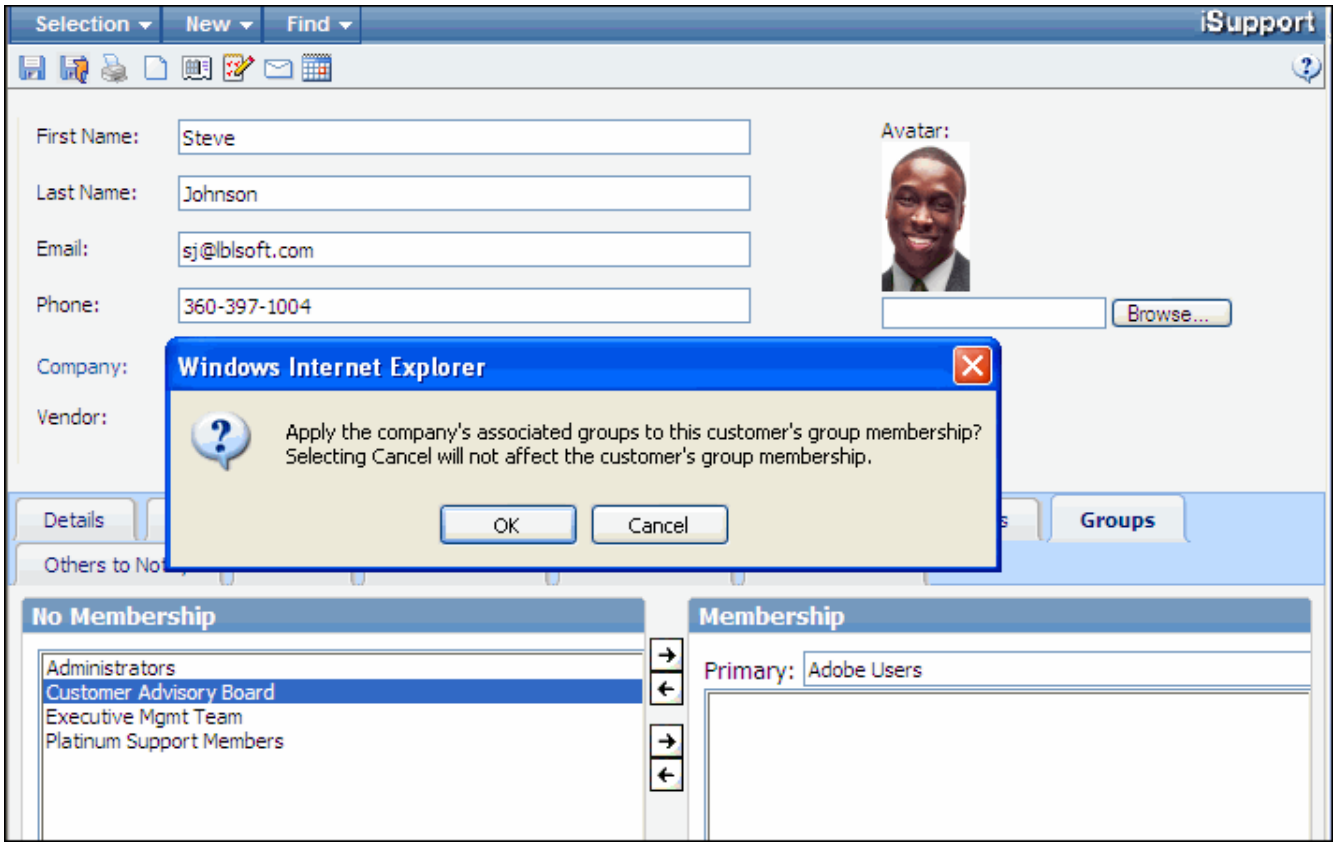
Customer groups enable you to generate surveys, generate correspondence, and view incidents for a group of customers. You can also enable customers to view incidents, changes, and assets via the End User Desktop for their associated groups. If configured, access to headlines, FAQs, categories, and knowledge entries may be restricted for members of a group. If you have Customer | Editor | Edit permission, you can add a customer to a group or remove a customer from a group. This can also be accomplished for selected customers and companies using the Add to Group and Remove From Group icons in customer views on the Desktop.



Field	Description
No Membership Membership	The No Membership field includes customer groups set up in the Configuration module. ■ To assign a customer to a group, select the group in the No Membership field and click the → icon. ■ To remove a customer from a group, select the group in the Membership field and click the ← icon. Use the Primary field to designate the customer group used for location-based routing of incidents submitted via the End User Desktop and email. The *Administrator's Guide* contains more information on location based routing.

Asterisks will appear next to any groups associated with the company. Groups are associated with companies for the purpose of easy customer assignment.

If customer groups are associated with a selected company, the following prompt will appear when you save a new record in the Customer Profile screen:

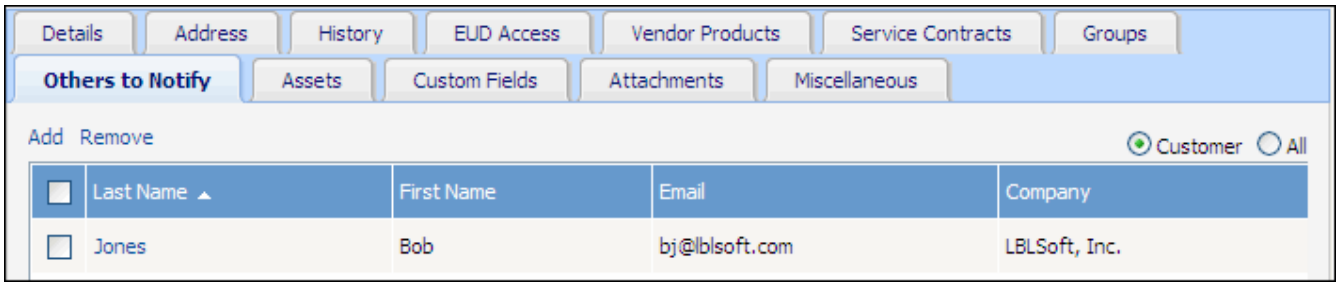


Click OK to assign the customer to the company's associated groups (those with asterisks).

Specifying Others to Notify

If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and support representatives that are not directly involved in the incident, problem, or change (if enabled) process to be sent event notifications and other correspondence. For example, notifications could be configured to be sent to a salesperson whenever an incident is created for one of their accounts. An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual incident, problem, change, or configuration item. This list can be viewed by clicking the All radio button.

To add someone to the Others to Notify list for a customer, click the Add link. Use the Remove link to delete anyone from this list.



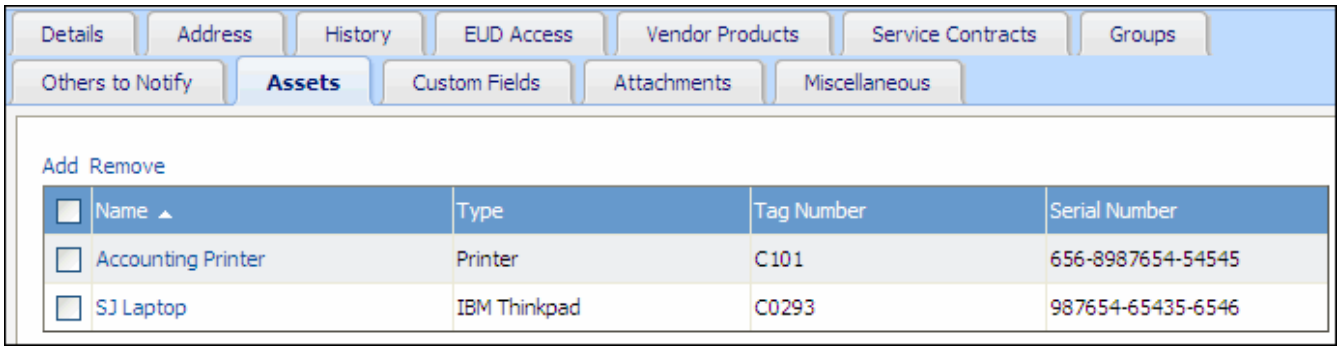
When you create a correspondence document from the Customer Profile screen or select a customer on the Desktop, you can choose to copy (CC) those in the selected customer's Others to Notify list. Note that the correspondence will also be sent to the Others to Notify list of the company assigned to the customer.

An Others to Notify list can be set up for a specific incident, problem, change, or configuration item; however, a record-specific list is only a subset. The comprehensive Others to Notify list also includes any Others to Notify lists for the selected customer profile, categorization, or company. When an event (for example, save or close) notifications are set up in the Configuration module, Others to Notify lists can be included in the To field or in the CC field. The comprehensive Others to Notify list will be used for these system-generated notifications as well as for any correspondence sent for incidents, problems, and changes via the Desktop or applicable entry screen.

Associating Assets

You can associate assets with Customer and Company records; this enables targeted customer and asset lookups when you create an incident while viewing a saved Asset, Customer Profile, or Company record. When you create an incident from the Customer Profile screen, the incident is created with the customer information and a list of the assets associated with the customer's company will appear.

Click the Add link to select the asset(s) to associate with the customer.

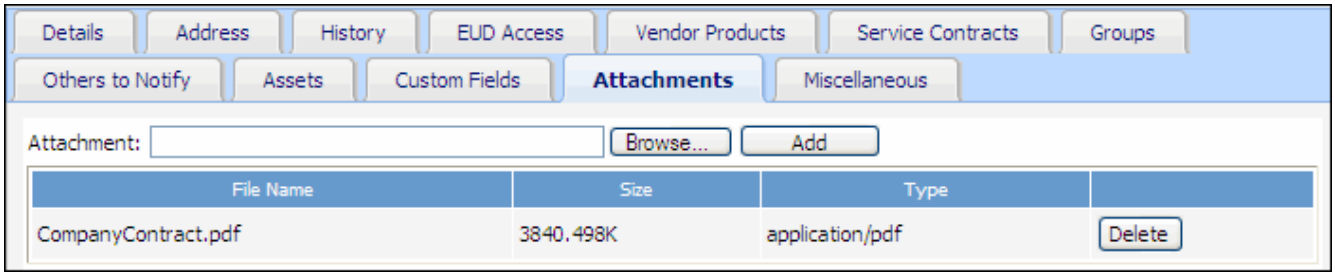


Completing Custom Fields

If custom fields have been set up for the Customer Profile screen, the Custom Fields tab will display as shown in the example below. You may be required to enter information in these fields.

Attaching Files

To attach a file to the customer profile, click on the Browse button in the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.



Completing the Miscellaneous Tab

Use the Miscellaneous tab to assign SLA settings other than the default to the customer, associate an approval cycle, and enter comments that will display when the customer is selected in the Incident or Change (if enabled) screen.

Field	Description
Source	One of the following will display in this field: ■ Direct Entry if the profile was created via the Desktop or Incident screen. ■ Email Submitted Incident if the profile was created via an email-submitted incident from an email address that did not exist in Customer Profiles. ■ End User Registration if a customer has registered via the End User Desktop or submitted an incident via the End User Desktop with an email address that does not exist in Customer Profiles. ■ Active Directory. If there is an entry in an Active Directory® source that does not exist in Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Active Directory®, it must contain a first name, last name, and email address. ■ Microsoft CRM. If there is an entry in Microsoft® CRM that does not exist in Customer Profiles, the entry is created in Customer Profiles. ■ Domino Directory. If there is an entry in Domino Directory that does not exist in Customer Profiles, the entry is created in Customer Profiles. ■ Other RDB. If there is an entry in an RDB source that does not exist in Customer Profiles, the entry is created in Customer Profiles. ■ LDAP. If there is an entry in the LDAP source that does not exist in Customer Profiles, the entry is created in Customer Profiles. The Customers | View All By Source view displays a list of all Customer Profile records sorted by the source from which they were created.
Custom SLA	Select the SLA settings to apply when an incident or change is created for the customer or leave None selected to apply the default escalation settings. Service level agreements (SLAs) monitor incidents (for example, the length of time an incident is open) and changes and can send notification email regarding status.
Approval Cycle	Select the predefined approval cycle to associate with the customer. Approvals require an incident or change (if enabled) to be approved by designated approvers before most functions can be used. The SLA in effect for the incident or change controls whether approvals are required, the first approval cycle, and any additional cycles to apply if the first cycle results in an approval. For more information on approval cycles, see "Specifying a Verdict" on page 194. You can associate multiple customers or companies with an approval cycle via the Associate Approval Cycle icon on customer and company views.

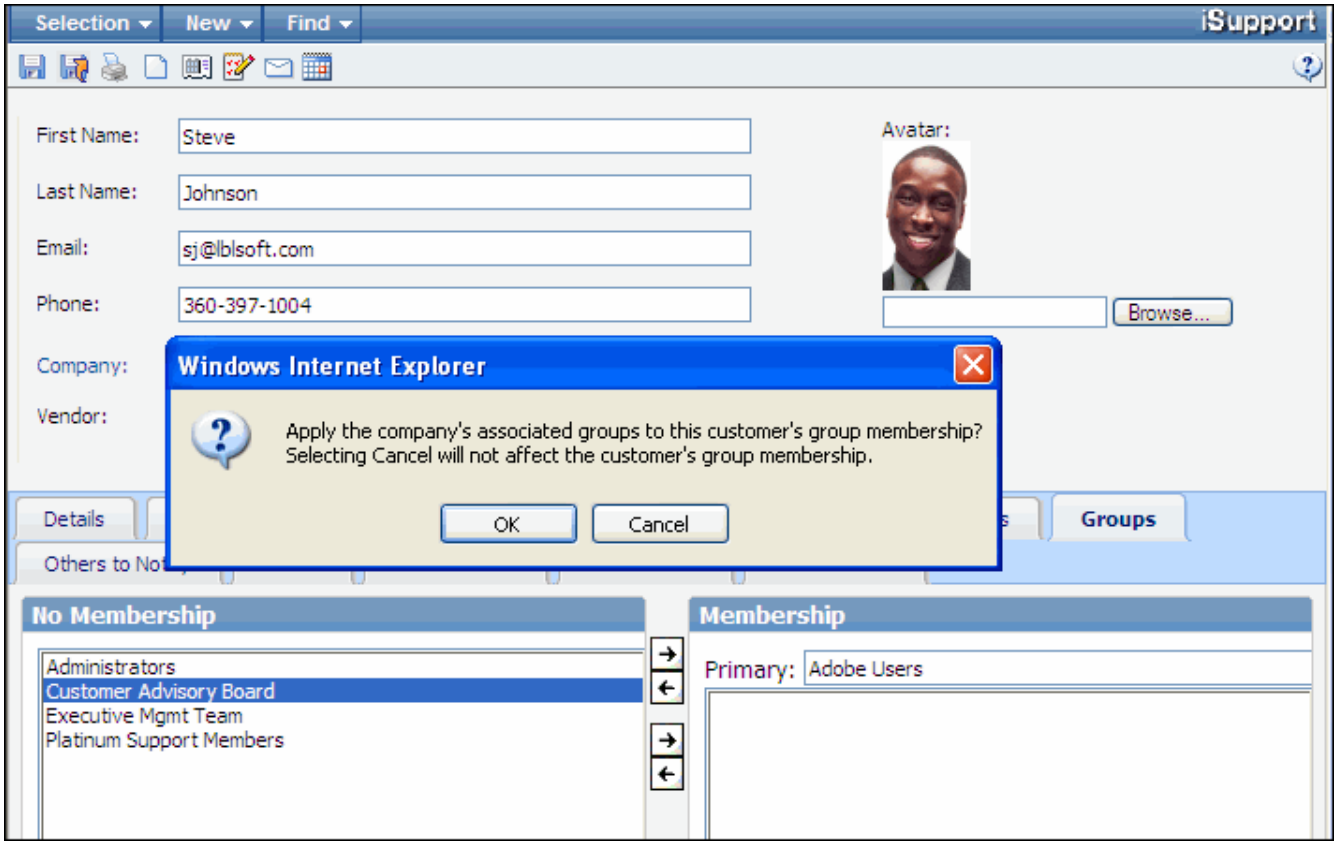
Field	Description
Purchasing Approval Cycle	Select the predefined purchasing approval cycle to associate with the customer. Approvals require a purchase request to be approved by designated approvers before most functions can be used. The SLA in effect controls whether approvals are required, the first approval cycle, and any additional cycles to apply if the first cycle results in an approval. For more information on approval cycles, see "Specifying a Verdict" on page 194. You can associate multiple customers or companies with an approval cycle via the Associate Approval Cycle icon on customer and company views.
Cost Center	If Purchasing is enabled, select the predefined cost center to associate with the customer. When the customer is selected as a recipient on a purchase request, this cost center will populate the Cost Center field in the purchase request. You can also associate a cost center with a customer via the Associate Cost Center icon on customer and company views.
Job Function	If Purchasing is enabled, select the predefined job function to associate with the customer. When the customer is selected as a recipient in a purchase request, this job function will populate the Job Function field in the purchase request.
Associated Configuration Item	If applicable, select a configuration item to associate with the customer profile. You can utilize the data on an associated item for views, reports, and correspondence; for example, you can send a correspondence to an associated group from the Configuration Item screen.
Comments	Enter comments that will display in an uneditable dialog when the customer is selected in the Incident screen. If a comment is entered for the customer's company as well, the company comment will appear before the customer's comment.

Saving a Customer Profile

To save a customer profile, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save or Save and Close Window icon.

If customer groups are associated with a selected company, the following prompt will appear when you save a new record in the Customer Profile screen:

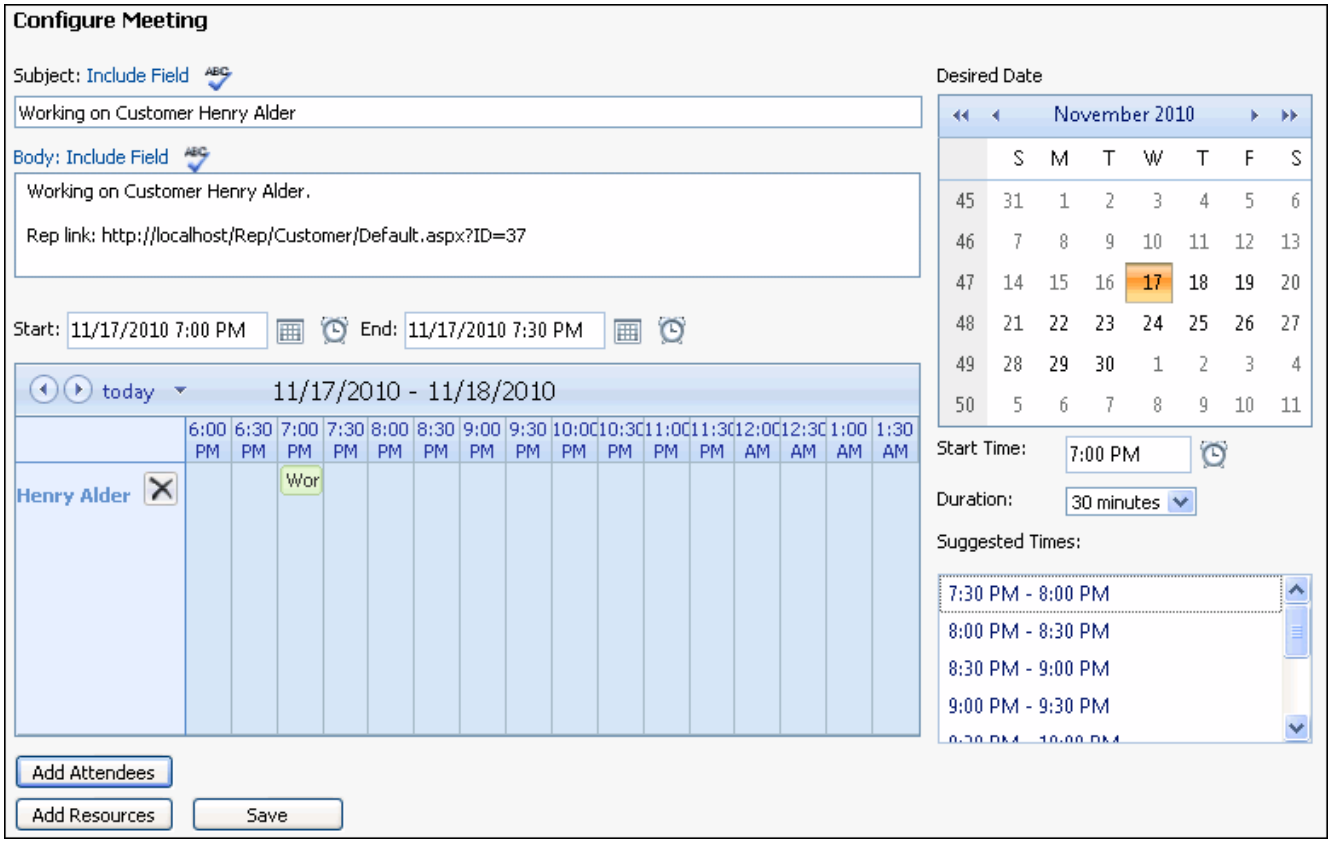


Click OK to assign the customer to the company's associated groups (those with asterisks).

Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Customer Profile screen for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules of meeting attendees,

enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

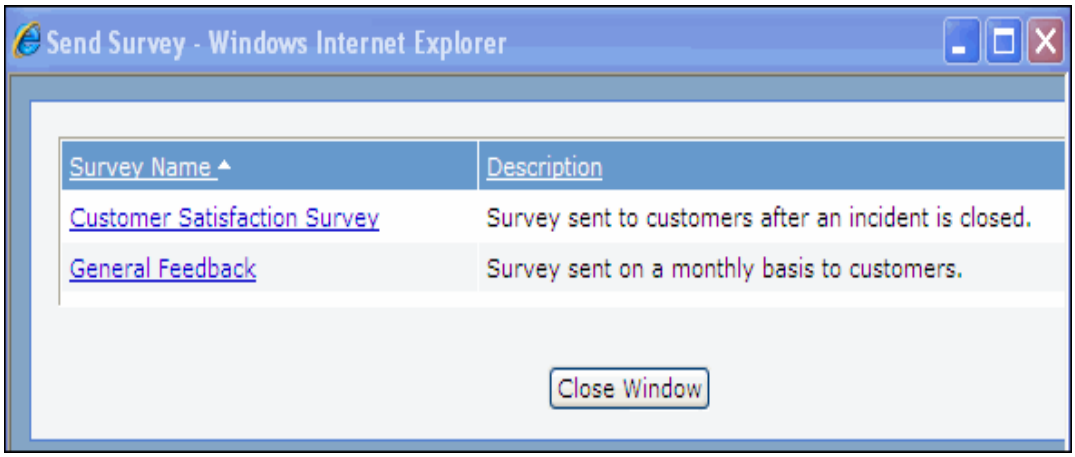
- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Customer *<customer name>*" will be included by default in the meeting entry along with a link to the record via the Desktop and End User Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees. The customer is added by default.

After scheduling a meeting, the View Meetings link will appear in the Customer Profile screen for displaying meeting details.

Sending a Survey

If iSupport's Survey functionality is enabled, you can send survey questionnaires to the customer. Surveys are defined in the Configuration module, and if configured, surveys can be sent automatically on an interval basis.

To send a survey, select New | Survey or click the Send Survey icon. The Send Survey dialog appears:



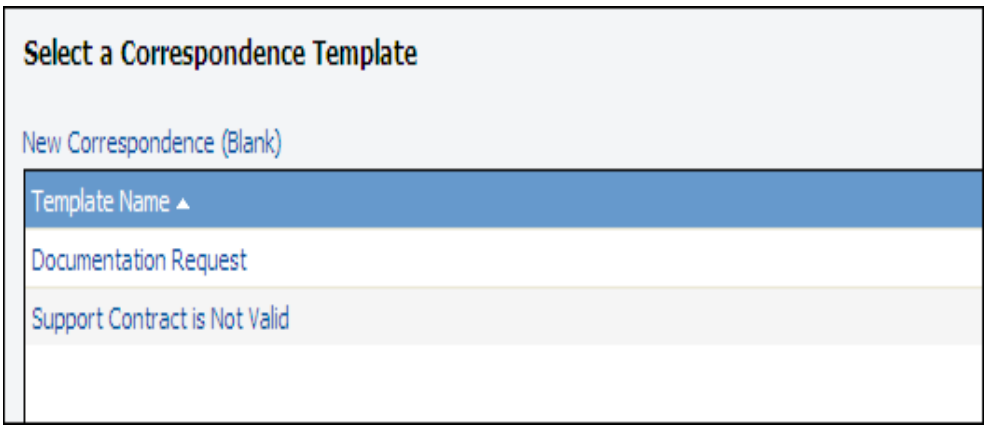
You can send surveys to multiple customers via the Desktop. If you have sufficient permissions, you can view survey responses on the Desktop.

Creating New Records From the Customer Profile Screen

Use the New menu to create a new Customer Profile record, incident, change (if enabled), service contract, or correspondence document from the Customer Profile screen.

- To create a new Customer Profile record, select New | Customer or click the New Customer icon. To create a new customer profile with the address, company, location, manager, groups, OTN, department, and SLA fields populated from the existing Customer Profile record, select New | Customer Similar Profile.
- To create a new incident, select New | Incident. See "Setting Up Incident Functionality" on page 327 for more information. The incident will be created with the information in the Customer Profile and a list of the assets associated with the customer's company will appear.
- To create a new Change record, select New | Change. See "Working with Change Records" on page 297 for more information.
- To create a service contract, select New | Service Contract. See "Working with Service Contracts" on page 459 for more information.
- To associate a configuration item, select New | Associated Configuration Item. See "Working with Configuration Items" on page 403 for more information.
- To create and send an email to the customer, after saving the Customer Profile record, select New | Correspondence or click the New Correspondence icon.

If creating correspondence, you can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).

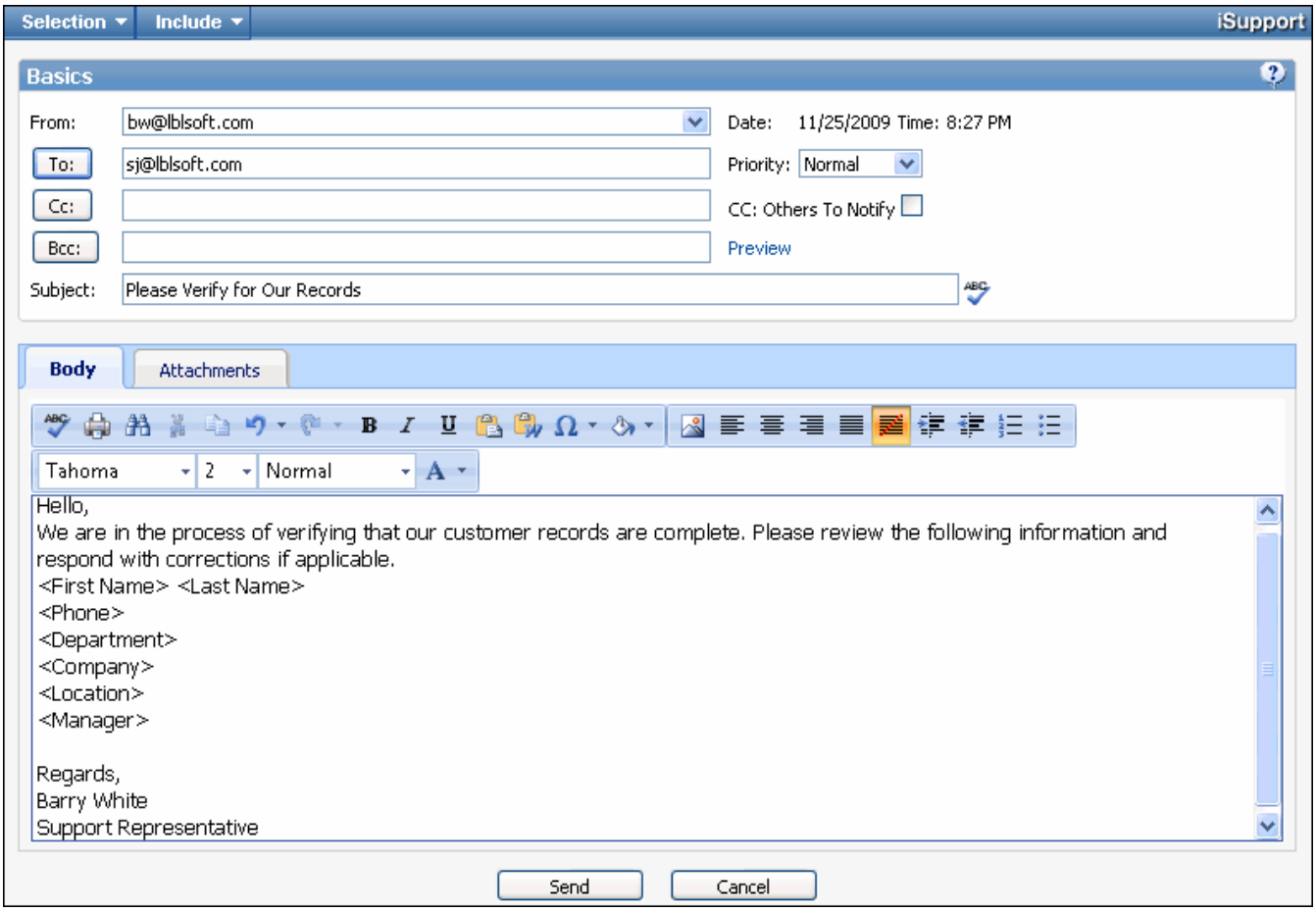


Correspondence templates may be configured to contain only read-only (greyed out) fields. Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

If creating a new correspondence document, the CC, BCC, Subject, and Attachment fields are blank. The Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop). If selecting a template, some or all of the fields may be populated.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included.

By default, the To field contains the email address set up for the customer in his/her Customer Profile record.



You can choose to copy (CC) those in the selected customer's Others to Notify list. Note that the correspondence will also be sent to the Others to Notify list of companies in which the customer is a member.

If using a template, fields (for example, <First Name>) may be included as set up during configuration. These fields will be replaced with corresponding data from the Incident, Change, or Customer screen when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Body field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the Customer Profile record.

Selection iSupport

Basics

From: bw@lblsoft.com Date: 11/25/2009 Time: 8:27 PM

To: sj@lblsoft.com Priority: Normal

Cc: CC: Others To Notify

Bcc:

Subject: Please Verify for Our Records

Body Attachments

Hello,
We are in the process of verifying that our customer records are complete. Please review the following information and respond with corrections if applicable.
Steve Johnson
360-397-1004
Administration
LBLSoft, Inc.
Headquarters
John Collins

Regards,
Barry White
Support Representative

Send Cancel

When finished completing fields in the Correspondence dialog, click the Send button.

Viewing Items Associated with a Customer

Use the Find menu in the Customer Profile screen to display incidents, changes, and assets entered for a customer and correspondence sent to a customer.

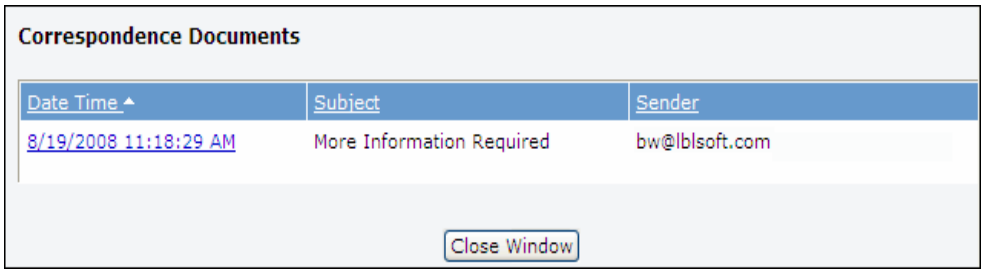
- To display a list of the customer's incidents, select options under the Find | Incidents menu. You can display open, closed, or all incidents for the customer or their company, location, or department.
- To display a list of changes assigned to the customer, select Find | Changes for Customer.
- To display a list of assets owned by the customer, select Find | Assets for Customer.

View Assets

Tag Number	Name	Type
203948	IBM Workstation	Desktop PC
C39839	Johnson Laptop	Computer

Close Window

- To display a list of all correspondence sent to the customer from the Incident, Change, or Customer Profile screens, select Find | Correspondence For Customer.



From the Correspondence Documents dialog, you can open a document by clicking on it.

Printing Customer Profiles

To print a customer profile, you can open the profile and select Print from the Selection menu or select the profile on the Desktop and then click the Print icon.

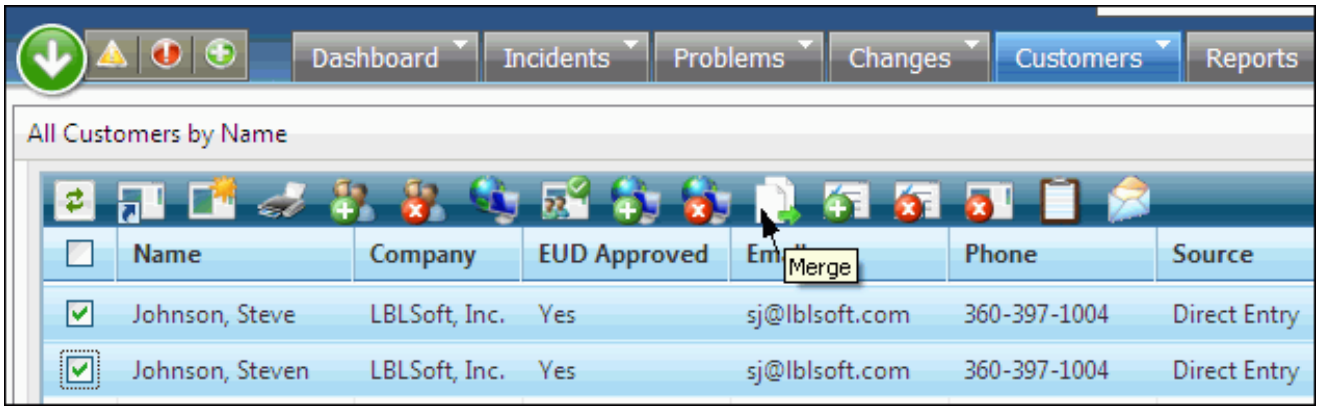
Deleting Customer Profiles

If you have permission to delete a Customer Profile record, you can:

- Open the profile and select Delete from the Selection menu.
- Select the profile on the Desktop and then click the Delete icon.

Merging Customer Profiles

Use the Customer/Company Merge feature if you wish to consolidate multiple Customer or Company Profile records; for example, if multiple Customer Profile records have been created for the same person or multiple companies have merged. From a customer or company view, you'll select a master containing some or all of the data you wish to use as well as other profiles that you wish to consolidate. (Note that selected profiles other than the master will be deleted after the merge.) Use the Merge icon to start the process; it will appear in customer and company views on the Desktop if you have the Customers | Merge permission.



The Merge dialog appears as shown below. Select the profile you wish to use for iSupport functionality in the Master Profile column and then select one of the following options:

- Take Master to use only the selected profile. The other selected profiles will be deleted.
- Merge to Master to add data from the other selected profile(s) to the profile selected as the master.

Merge Customers

Select the profile to use as a master. Then select:

- Use Master to retain only the selected profile. The other profiles will be deleted.
- Merge to Master to add values from the other selected profile(s) to the profile selected as the master.

Work items using these profiles will be updated when the merge is complete.

Values cannot be merged onto a master that is from a source that is synchronized via directory integration.

Master Profile	Last Name ▲	First Name	Phone	Location	Company	Department	Email	Customer ID	Synced
◉	Johnson	Steve	360-397-1004	Headquarters	LBLSoft, Inc.	Administration	sj@lblsoft.com	8675309	No
○	Johnson	Steven	360-397-1004	Headquarters	LBLSoft, Inc.	Administration	sj@lblsoft.com	8675309	No

Use Master Only | Merge to Master | Cancel

If you selected Merge to Master, the fields in each selected profile appear for selecting the data to be retained in the master profile.

Merge Customers

Select the profile to use as a master. Then select:

- Use Master to retain only the selected profile. The other profiles will be deleted.
- Merge to Master to add values from the other selected profile(s) to the profile selected as the master.

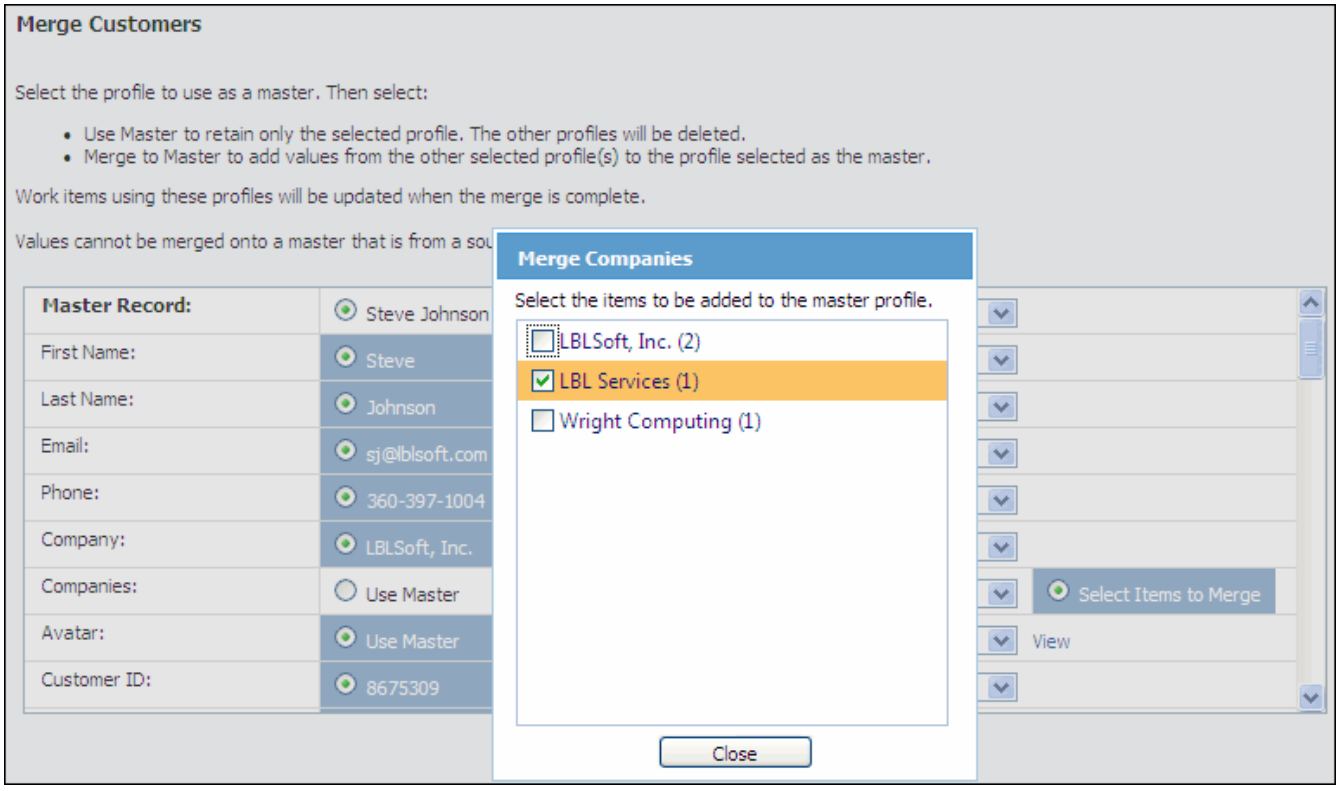
Work items using these profiles will be updated when the merge is complete.

Values cannot be merged onto a master that is from a source that is synchronized via directory integration.

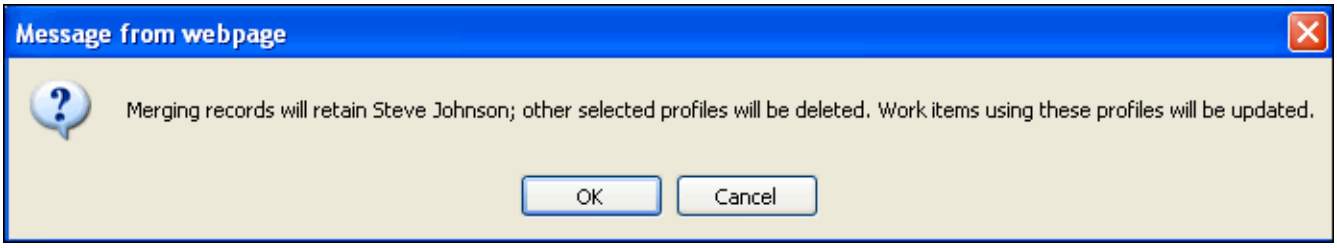
Master Record:	◉ Steve Johnson	○ Steven Johnson	
First Name:	◉ Steve	○ Steven	
Last Name:	◉ Johnson	○ Johnson	
Email:	◉ sj@lblsoft.com	○ sj@lbl.com	
Phone:	◉ 360-397-1004	○ 360-397-1004	
Company:	◉ LBLSoft, Inc.	○ LBLSoft, Inc.	
Companies:	○ Use Master	○ Steven Johnson	◉ Select Items to Merge
Avatar:	◉ Use Master	○ Steven Johnson	View
Customer ID:	◉ 8675309	○ 8675309	

Finish | Cancel

If a profile contains multiple items for an entity, click the Select Items to Merge link to select the items to be added to the master.



The following dialog will appear after clicking the Finish button:

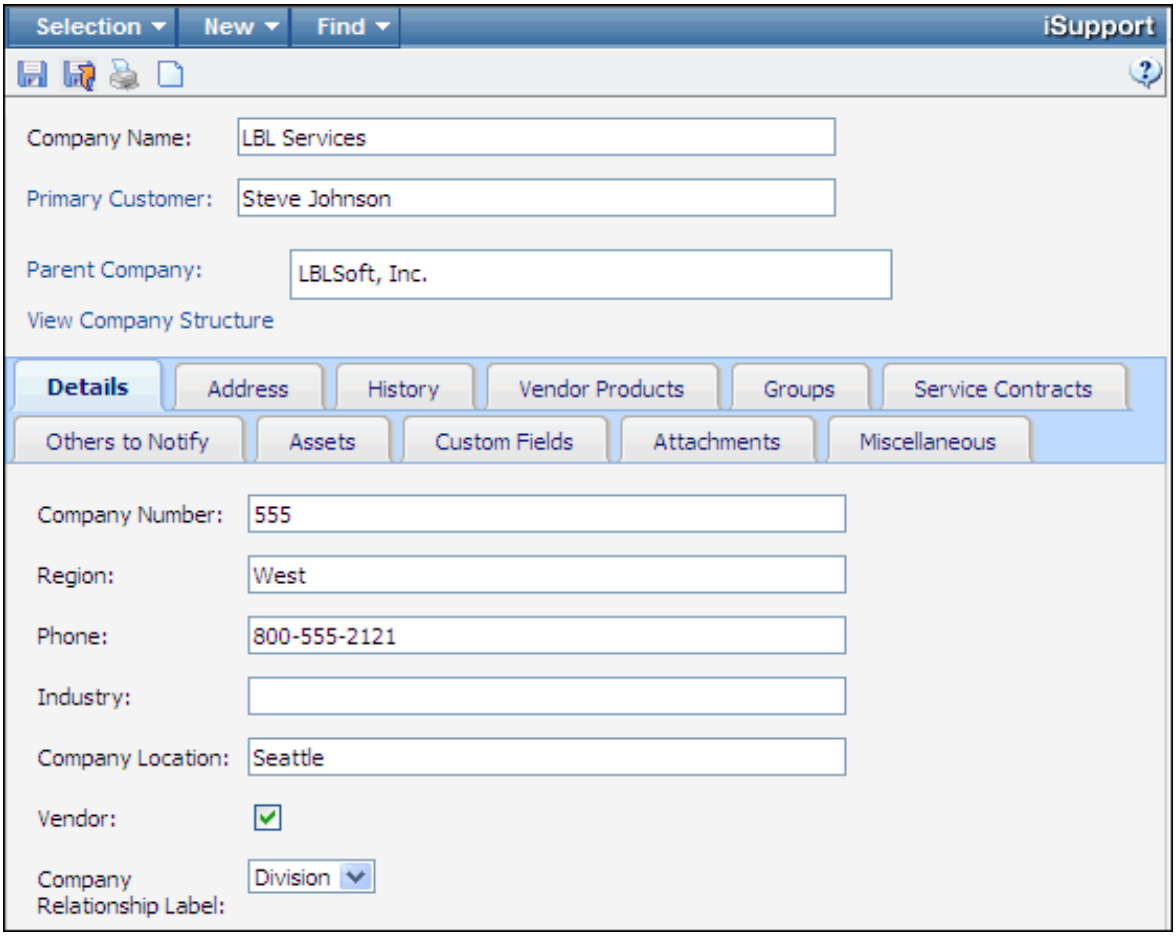


After clicking OK, the master will be created and all records (incidents, problems, changes, etc.) that were associated with the other selected profile(s) will be associated with the master profile. The other selected profiles will be deleted.

4 Working with Company Records

Overview

Use the Company screen to record company information that can be used in iSupport's Incident, Change, Purchasing, Service Contract, and Asset functionality.



After entering a company in this screen, it will be available for selection when a customer is added via the Customer Profile screen. You can send an email or survey to all customers within a company.

If permissions are enabled during configuration, you may not be able to create a new Company record, or view, edit, or delete an existing Company record.

Groups

Customer groups are defined in the Configuration module, and enable you to:

- Send surveys and correspondence and report on incidents for a selected group of customers via the Desktop.
- Allow customers to view records via the End User Desktop for their associated groups. You can associate support representative locations for location-based routing of items submitted via the End User Desktop and email.
  - The location selected by the EUD customer takes precedence, then the support representative location associated with the customer's primary group, then the location associated with the company's primary group. If none is found, the default location specified in configuration is used.
  - Email-submitted tickets. The customer's profile will be searched for a primary group and associated support representative location. If there is no associated location, the customer's company record is searched for a primary group and associated location. If none are found, the location specified in configuration will be used.
- Restrict access to headlines, FAQs, knowledge entries, and categories on the End User Desktop.

If you have the appropriate permissions set up in the Configuration module, you can add customers to groups via the Customer Profile screen. You can also use the Groups section in the Company screen to assign all of a company's current customers to a group. You can view customer group membership in the Customer Profile screen and on the Desktop.

Others to Notify

If enabled in configuration, you can set up an Others to Notify list of customers and support representatives for a company, to be used for sending correspondence and incident, problem, and change (if enabled) notifications to those not directly involved in the process. For example, you could select a salesperson to be notified whenever an incident is created for one of their accounts.

An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual incident, problem, change, or configuration item.

Service Contracts

If Service Contract functionality is enabled in configuration, you can use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or

assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe).

Associated Configuration Items

If you have the Service Desk edition, Configuration Management Database (CMDB) functionality enables you to display, report on, and send correspondence regarding the assets, services, and other resources that are crucial to your organization's operation and the relationships between those items. A CMDB contains configuration items for the resources to be tracked and the relationships between those items. You can associate a predefined configuration item with a Company record, and utilize the data on the associated Company record for views, reports, and correspondence. For example, you can send a correspondence with information from the associated Company record from the Configuration Item screen.

The associated Company record feature is enabled for a CMDB type in the CMDB Type Configuration screen, and the association is performed in Company or Configuration Item screen. See "Working with Configuration Items" on page 403 for more information on CMDB functionality.

Service Level Agreements

Service level agreements (SLAs) monitor incidents and changes and send notification email regarding status.

- If priority-based escalation is enabled and an incident or change remains at a certain priority level without closure for a period of time longer than a specified time limit, the incident or change escalates to the next (higher) priority level.
- If reassignment-based escalation is enabled and the original assignee does not close the incident or change within a defined period of time, it will be automatically reassigned to a support representative in a group or a support representative with skill associated with the incident or change categories.

SLAs can also notify managers, customers, and/or support representatives when an incident or change is created, routed, escalated, or closed. SLAs and escalation settings are set up in the Configuration module.

Custom SLA settings can be used to define various levels of service; for example, a set of tighter thresholds can be set for premier customers and a set of more generous thresholds can be set for other customers. Custom SLA settings can be assigned to incident templates, change templates, categories, customers, and companies.

- If the configured winner of a category and customer SLA conflict is set to Customer:
  - Incident or change created; default SLA applied.
  - The customer and customer's company are checked for custom SLAs; if both have a custom SLA, the customer's custom SLA is always applied. In the absence of a customer custom SLA or company custom SLA, if the categorization has a custom SLA, it is applied.

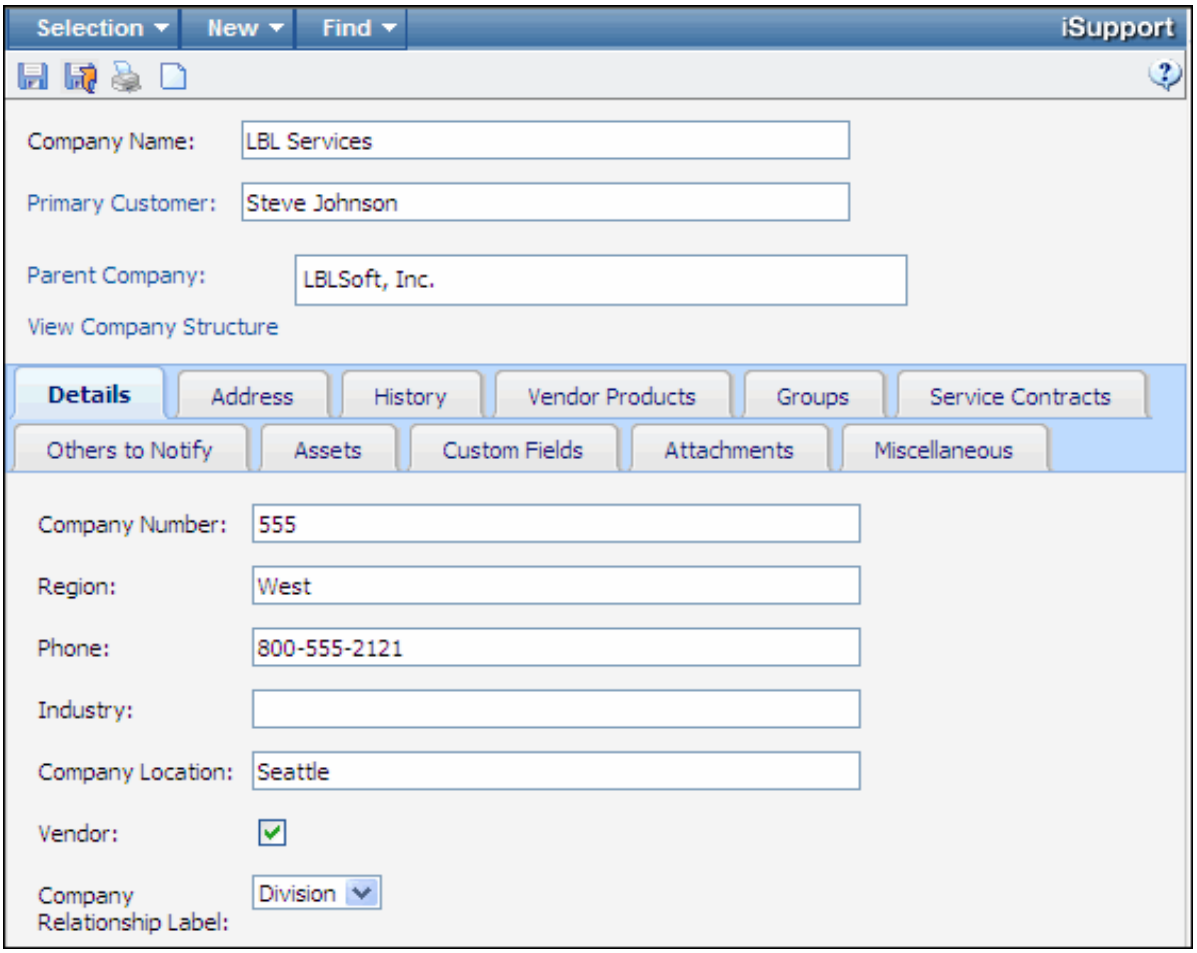
- If an incident or change template is applied and it has a custom SLA, it will override any other SLA.

- If the configured winner of a category and customer SLA conflict is set to Category:
  - Incident or change created; default SLA applied.
  - If the categorization has a custom SLA, it is applied. In the absence of a categorization custom SLA, the customer's company and customer are checked for custom SLAs; if both have a custom SLA, the customer's custom SLA is always applied.
  - If an incident or change template is applied and it has a custom SLA, it will override any other SLA.

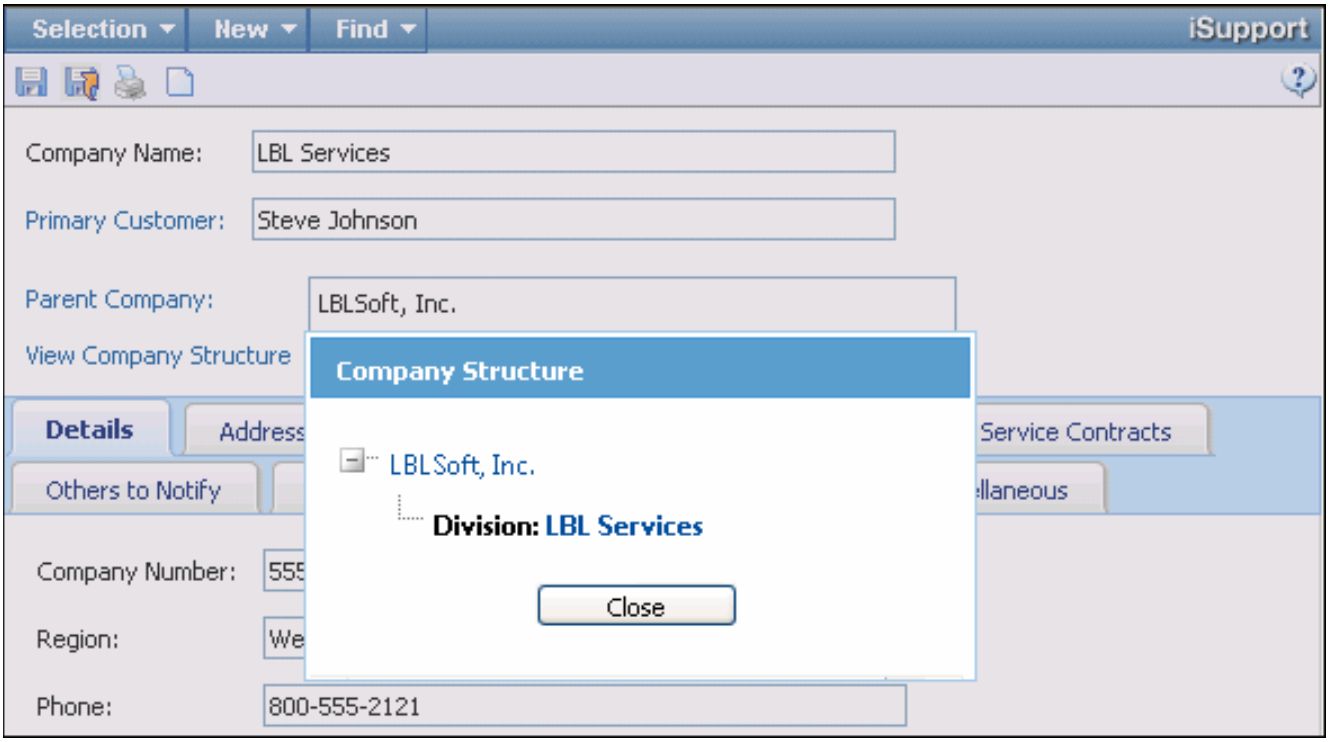
Consult with your administrator regarding escalation time frames in order to understand how quickly incidents and changes must be resolved.

Entering Company Records

To access the Company screen, select Company on the Desktop action menu.



Field	Description
Company Name	Enter the company name.
Primary Customer	Select the customer who will be the primary contact for the company.
Parent Company	This field appears if the Related Companies feature is enabled in configuration. Select the new or existing company to display a level above the current company when the View Company Structure link is clicked.
View Company Structure	This field appears if the Related Companies feature is enabled in configuration. Click this link to display the current company along with its parent company in a hierarchical structure. The entry in the Company Relationship Label field will precede the current company name.



Entering Company Details

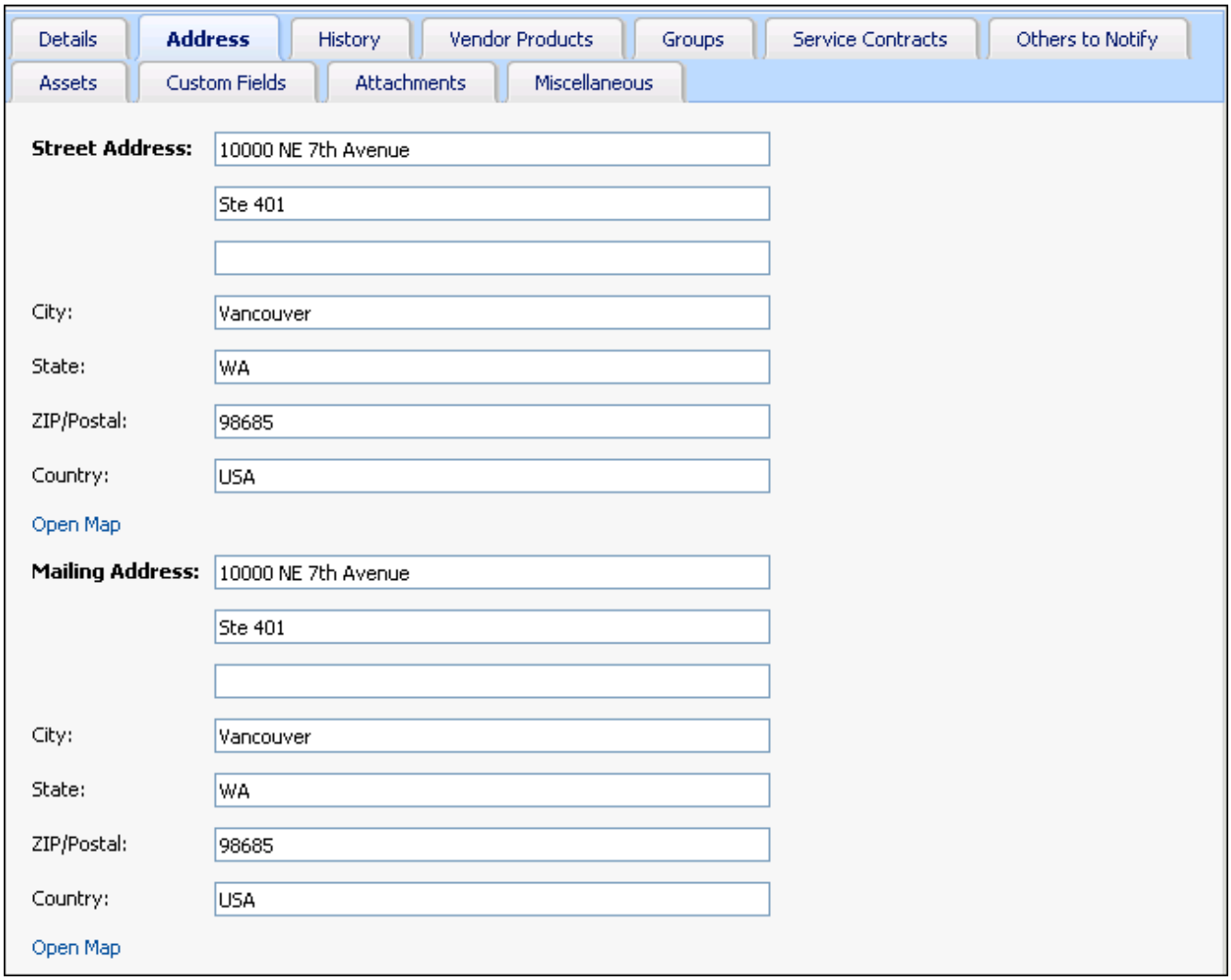
Use the Details tab to enter basic information about the company.

Field	Description
Company Number	Enter an identification number for the company.
Region	Enter the region for the company.
Phone	Enter the primary telephone number for the company.
Industry	Select the industry in which the company is involved.

Field	Description
Company Location	Enter the location of the company.
Vendor	This checkbox appears if you have the Service Desk edition and purchasing functionality is enabled. Select this checkbox to designate the company as a vendor, which enables association with Product records for use in purchase requests. This also enables the Vendor Products section to appear below the Details section in the Company screen.
Company Relationship Label	Select the label to define the current company's relationship to the parent company. This label will precede the current company in the hierarchy that appears when the View Company Structure link is clicked. Company relationship labels are defined in the Configuration module.

Entering Address Information

Use the Address tab to enter the company's street and mailing address information; it is used for reference purposes. If you have internet access, you can click the Open Map link to search Google Maps using the specified address, city, state, and ZIP/Postal code.



Viewing Audit History

After you save a Company record, an entry appears on the Audit History tab. This section includes a notation of every action performed on the record with the date, time, and author stamp.

Associating Vendor Products

This tab appears if the company has been designated as a vendor via the Vendor checkbox on the Details tab. When vendor products are associated with a company, the products are available for selection on purchase requests. Products can also be associated with company vendors in the Product screen.

Click the Add link to associate products with this company. After making an entry, use the Save icon to save it or the Cancel icon to undo your entry. Use the Edit icon to modify an entry.

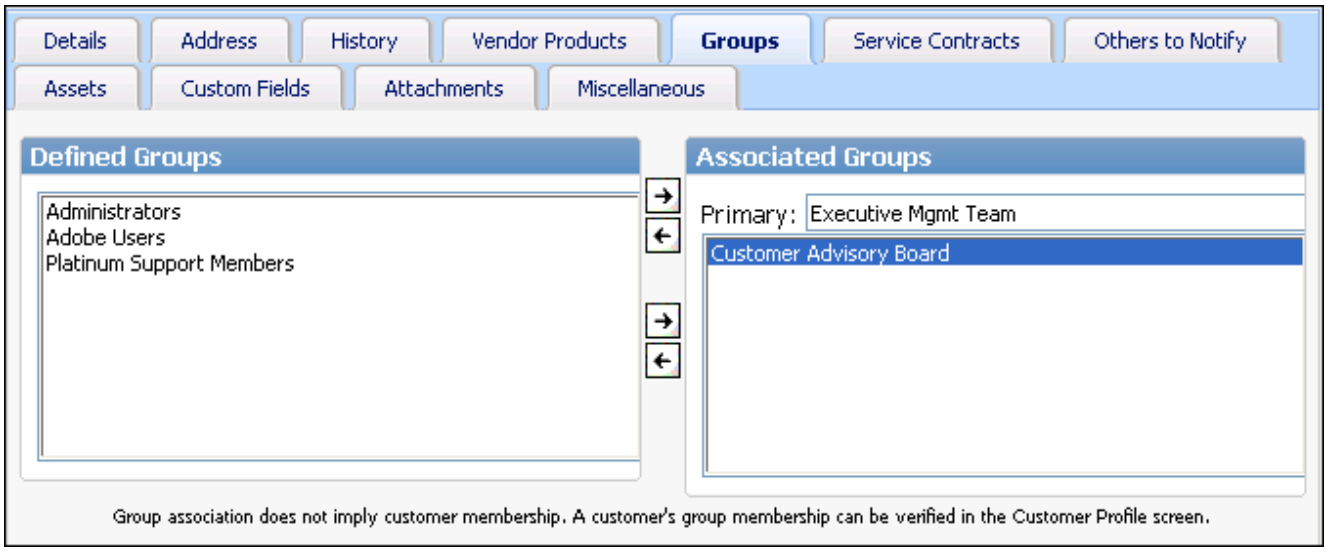
Field	Description
Asset Type	Select the predefined asset type for the product to be associated with this company vendor.
Name	Select the product to be associated with this company vendor.
Rate	Enter the cost of the product to be multiplied by the quantity entry for a line item in the Purchase Request screen.

Assigning to Customer Groups

Customer groups enable you to generate surveys, generate correspondence, and view incidents for a group of customers. You can also enable customers to view incidents, changes, purchase

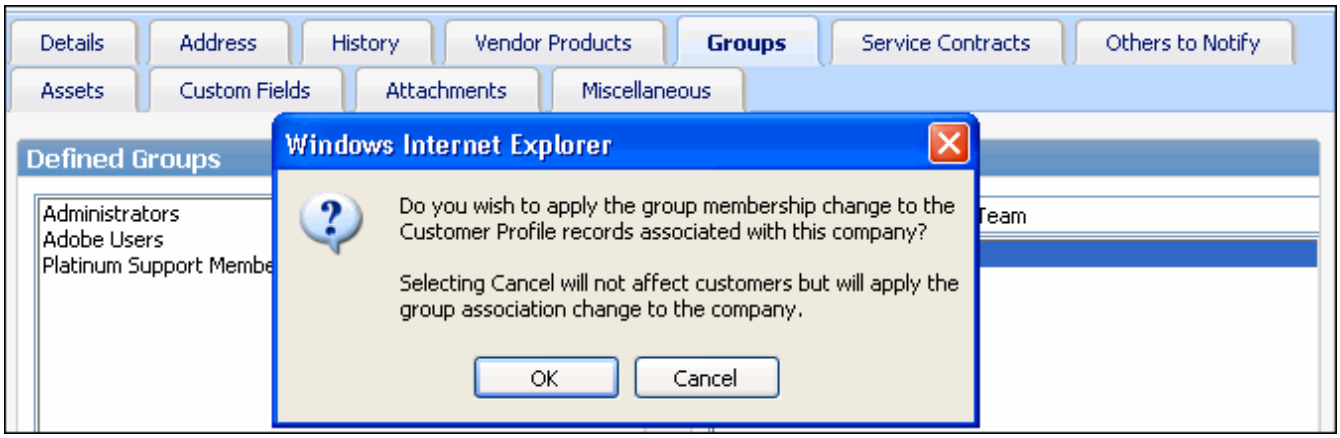
requests, and assets via the End User Desktop for their associated groups. If configured, access to headlines, FAQs, categories, and knowledge entries may be restricted for members of a group.

If you have the appropriate permissions set up in the Configuration module, you can use the Groups tab to assign all of a company's current customers to a group. This can also be accomplished for selected customers and companies on the Desktop.



Field	Description
Defined Groups Associated Groups	The Defined Groups field includes customer groups set up in the Configuration module. To assign the all of the company's current customers to the group, select the group and click the → icon. To remove a group from the Associated Groups field, select the group and click the ← icon. Use the Primary field to designate the customer group used for location-based routing of tickets submitted via the End User Desktop and email. The *iSupport Administrator's Guide* contains more information on location based routing.

The following prompt appears when you save the record:



If you select OK at the prompt, the company's customers will be assigned to the group and the group will appear in the Associated Groups field in the Groups section in each customer's profile record.

If you select Cancel at this prompt, the group will still be included in the Associated Groups field for future customer assignment. See "Assigning to Customer Groups" on page 137 for more information.

Associating Service Contracts

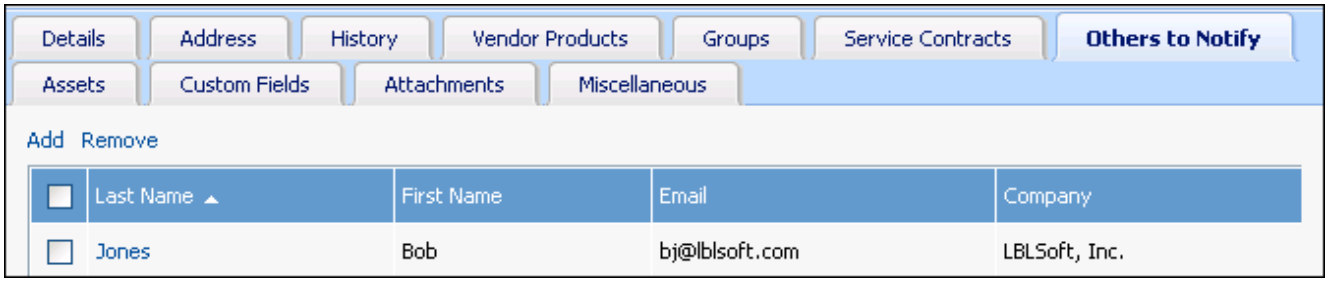
This tab appears if Service Contract functionality is enabled in configuration. Use Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe).

On the Service Contracts tab, click the New link to create a new service contract and assign it to the company, click the Add link to assign the existing contract to the company, or click the Remove link to remove the assignment. See "Working with Service Contracts" on page 459 for information on creating service contracts.

Specifying Others to Notify

If enabled in configuration, you can set up a list of customers and/or support representatives that are not directly involved in the incident, problem, or change (if enabled) process to be sent event notifications and other correspondence. For example, notifications could be configured to be sent to a salesperson whenever an incident is created for one of their accounts. An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual incident, change, problem, or configuration item.

To add to the Others to Notify list for all customers assigned to the company, click the Add link. Use the Remove link to delete anyone from this list.



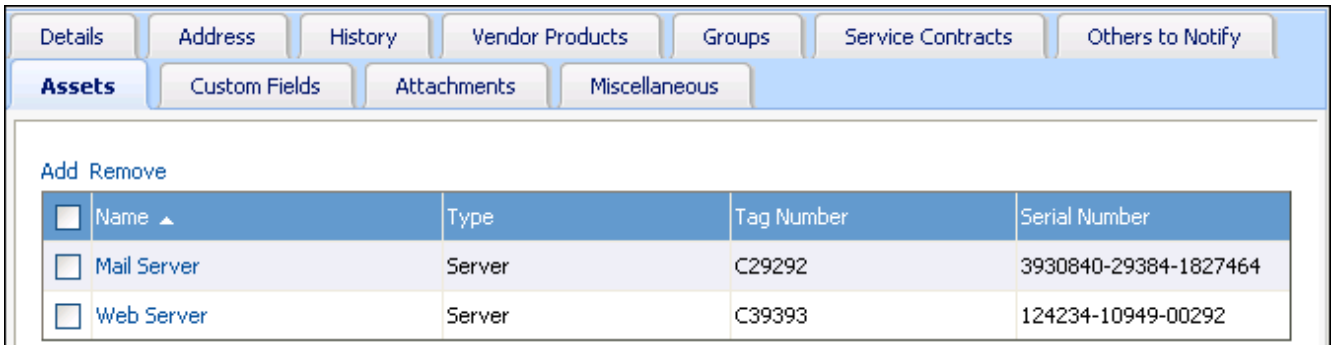
When you create a correspondence document from the Customer Profile screen or select a customer on the Desktop, you can choose to copy (CC) those in the selected customer's Others to Notify list. Note that the correspondence will also be sent to the Others to Notify list of the company assigned to the customer.

An Others to Notify list can be set up for a specific incident, problem, change, or configuration item. However, the list is only a subset; the comprehensive Others to Notify list for an incident, problem, change, or configuration item also includes any Others to Notify lists for the selected customer profile, categorization, and company. When event (save, close, etc.) notifications are set up in the Configuration module, Others to Notify lists can be included in the To field or in the CC field. The comprehensive Others to Notify list will be used for these system-generated notifications as well as for any correspondence sent via the Desktop or entry screen.

Associating Assets

You can associate assets with Customer and Company records; this enables targeted customer and asset lookups when you create an incident while viewing a saved Asset, Customer Profile, or Company record. When you create an incident from the Company screen, a list of customers in the company will appear for selection. When associating an asset with that incident, the list of assets associated with the company and customer will appear for selection.

Click the Add link to select the asset(s) to associate with the company

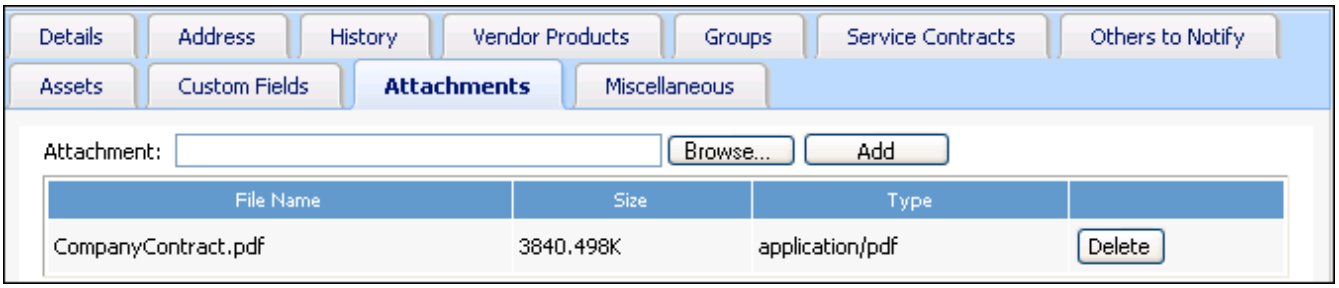


Completing Custom Fields

If custom fields have been set up for the Company screen, fields will appear on the Custom Fields tab. You may be required to enter information in these fields.

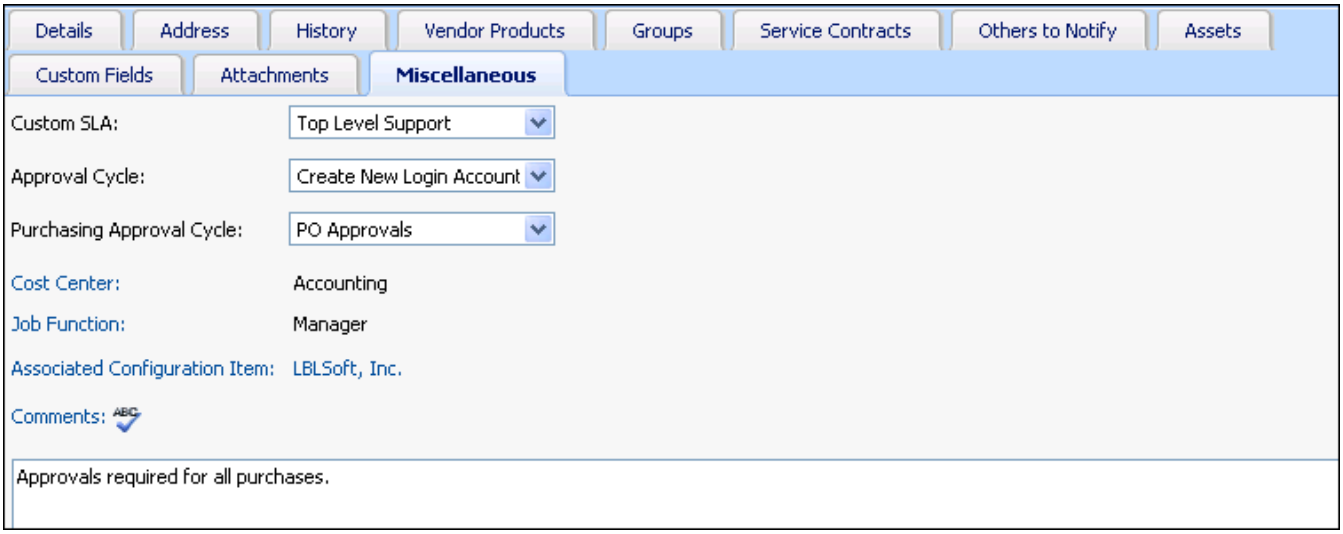
Attaching Files

To attach a file to the Company record, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.



Completing the Miscellaneous Tab

Use the Miscellaneous tab to assign SLA settings other than the default to the company, assign approval cycles, a cost center, and job function, associate a configuration item, and enter comments that will display when a customer of the company is selected in the Incident screen.



Field	Description
Custom SLA	Select the SLA settings to apply when an incident is created for a customer of the company or leave None selected to apply the default escalation settings. Service level agreements (SLAs) monitor incidents (for example, the length of time an incident is open) and changes and can send notification email regarding incident status.
Approval Cycle	Select the predefined approval cycle to associate with the company. Approvals require an incident or change (if enabled) to be approved by designated approvers before most record functions can be used. The SLA in effect for the incident or change controls whether approvals are required, the first approval cycle, and any additional cycles to apply if the first cycle results in an approval. For more information on approval cycles, see "Specifying a Verdict" on page 194.
Purchasing Approval Cycle	If Purchasing is enabled, select the predefined approval cycle to associate with the company. When a customer of the company is selected as a recipient for the purchase request, the approval cycle will apply upon saving. The request must be approved by designated approvers before most record functions can be used. For more information on approval cycles, see "Specifying a Verdict" on page 194.
Cost Center	If Purchasing is enabled, select the predefined cost center to associate with the company. When a customer of the company is selected as a recipient in a purchase request, this cost center will populate the Cost Center field in the purchase request.
Job Function	If Purchasing is enabled, select the predefined job function to associate with the company. When a customer of the company is selected as a recipient in a purchase request, this job function will populate the Job Function field in the purchase request.
Associated Configuration Item	If applicable, select a configuration item to associate with the company. If companies are configured to be an associated item for a configuration item type, configuration items of that type will appear in the Select Associated Configuration Item dialog. Associated configuration items are used for views, reports, and correspondence; for example, you can send a correspondence to an associated group from the Configuration Item screen.
Comments	Enter comments regarding the company. These comments will display in an uneditable dialog when a customer of the company is selected in the Incident screen. The comments will appear before any customer comments.

Saving a Company Record

To save a Company record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save or Save and Close Window icon.

Creating New Records From the Company Screen

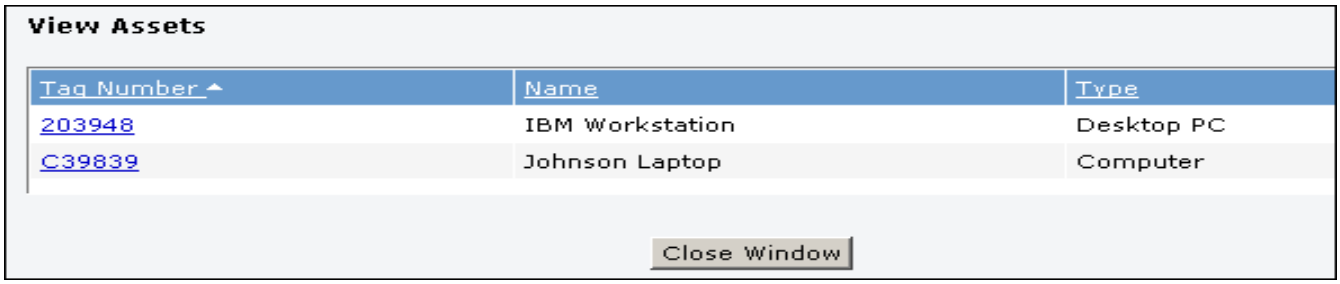
Use the New menu to create a new Company record, customer profile, or service contract, incident from the Company screen.

- To create a new Company record, select New | Company or click the New Company icon.
- To create a new Customer Profile record, select New | Customer Profile.
- To create a new incident, select New | Incident.
- To create a service contract, select New | Service Contract. See "Working with Service Contracts" on page 459 for more information.
- To associate a configuration item, select New | Associated Configuration Item. See "Working with Configuration Items" on page 403 for more information.

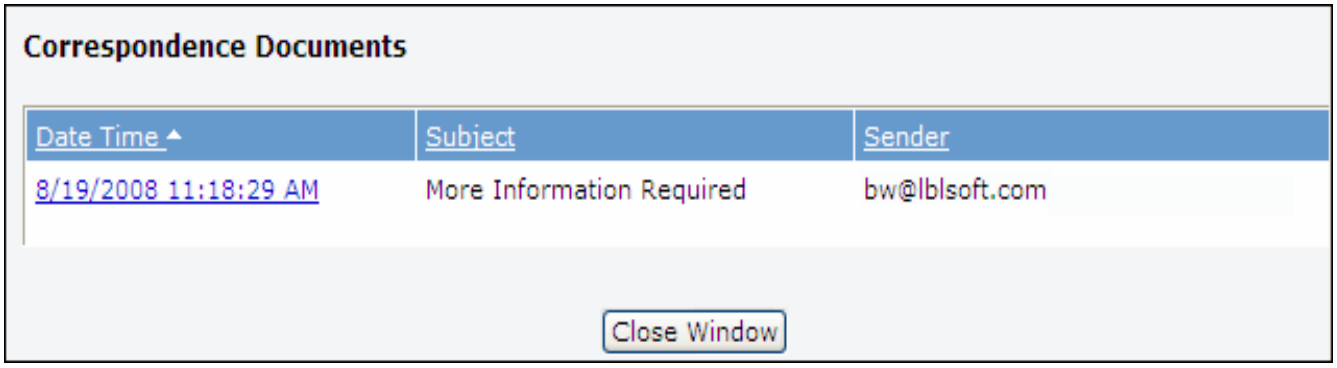
Viewing Items Associated with a Company

Use the Find menu in the Company screen to display incidents and assets entered for customers of the company, correspondence sent to customers in the company, and a list of customers in the company.

- To display a list of incidents for customers in the company, select options under the Find | Incidents menu. You can display open, closed, or all incidents for customers in the company.
- To display a list of assets associated with customers of the company, select Find | Assets for Company.



- To display a list of all correspondence sent to customers of the company (via the Incident screen or the Customer Profile screen), select Find | Correspondence For Company.



From the Correspondence Documents dialog, you can open a document by clicking on it.

- To display a list of all customers associated with the company (via the Customer Profile screen), select Find | Customers for Company.

Customers

First	Last	Phone	Email	Location
Barry	White	360-397-1088	bw@lblsoft.com	Headquarters
Donna	Erickson	360-397-1099	de@lblsoft.com	Northwest Division
Gregg	Williams	360-397-1000	gw@lblsoft.com	Northwest Division

Close Window

Printing Company Records

To print a company record, you can open the record and select Print from the Selection menu or select the record on the Desktop and then click the Print icon.

Deleting Company Records

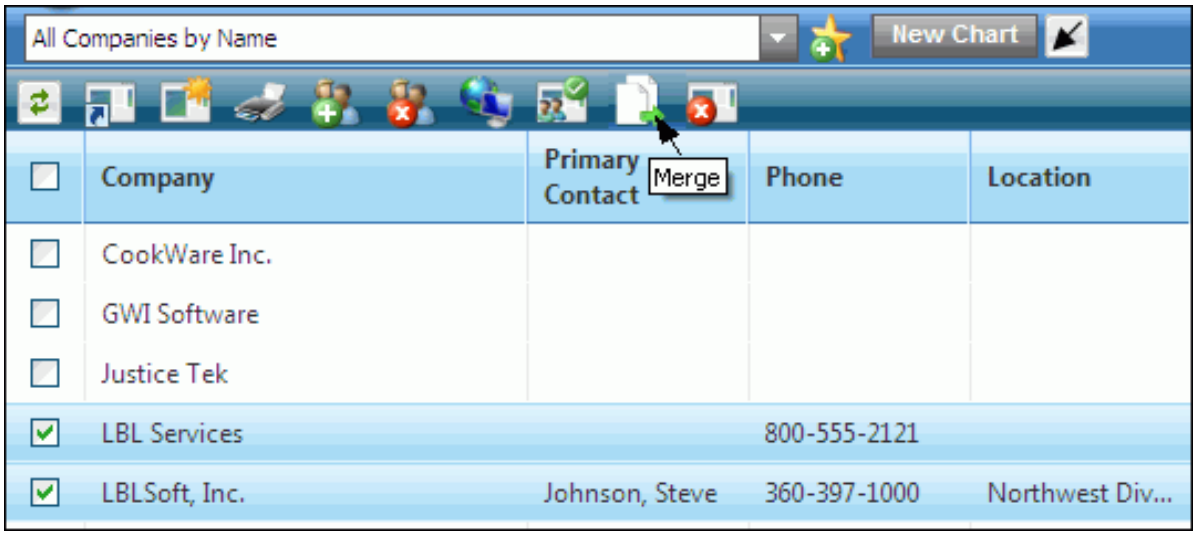
To delete a Company record, you can:

- Open the record and select Delete from the Selection menu.
- Select the record on the Desktop and then click the Delete icon.

Merging Company Profiles

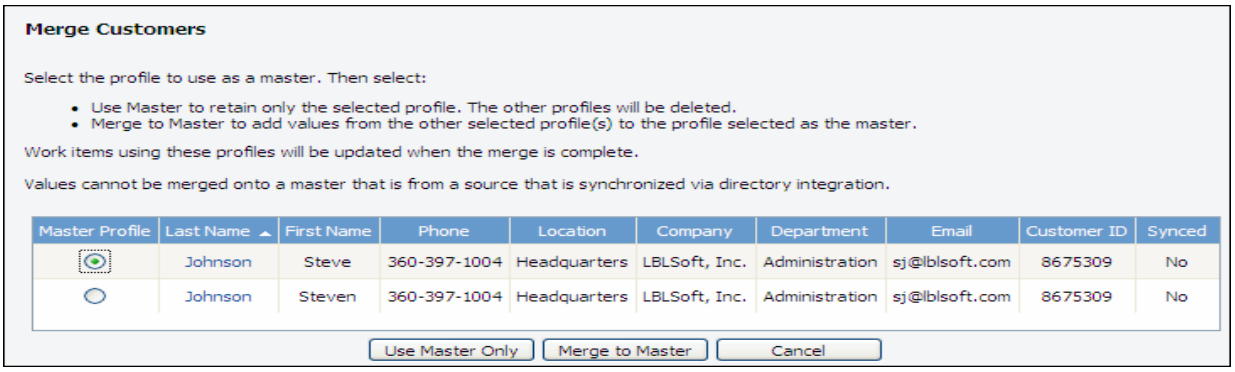
If you have the Customer/Merge permission set in your Support Representative profile, you can use the Company Merge feature to consolidate multiple Company Profile records (for example, if multiple companies have merged) and use the consolidated record for iSupport functionality. From a company view on the Desktop, you'll select a master containing some or all of the data you wish

to use, as well as other profiles that you wish to consolidate. (Note that selected profiles other than the master will be deleted.) Use the Merge icon to start the process.



The Merge dialog appears as shown below. Select the profile you wish to use for iSupport functionality in the Master Profile column and then select one of the following options:

- Take Master to use only the selected profile. The other selected profiles will be deleted.
- Merge to Master to add data from the other selected profile(s) to the profile selected as the master.



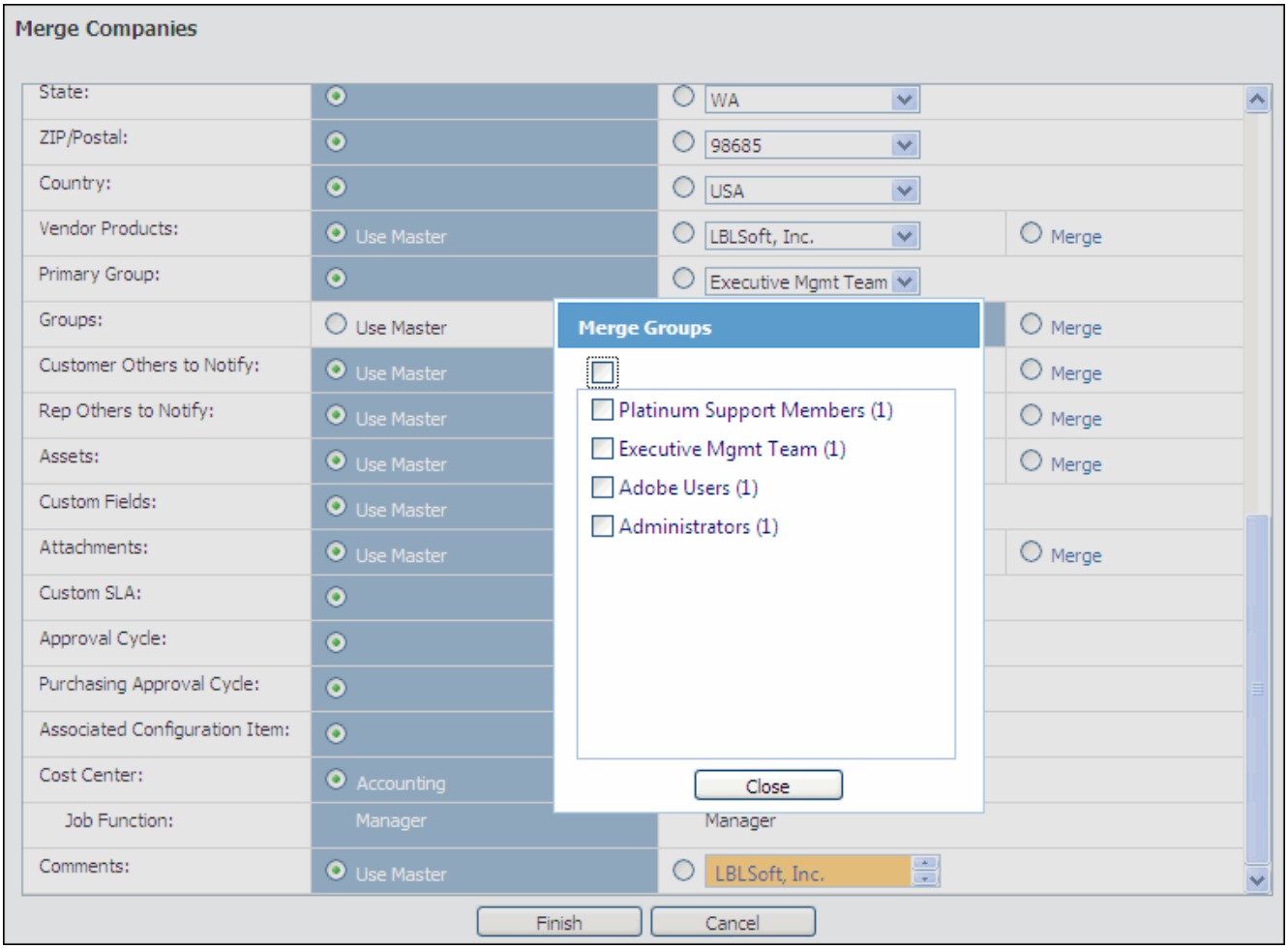
If you selected Merge to Master, a dialog appears for selecting the data to be retained in the master profile.

Merge Companies

Master Record:	Technology PCS	LBLSoft, Inc.
Name:	Technology PCS	LBLSoft, Inc.
Primary Customer:		Steve Johnson
Company Number:	143	6544
Region:	South	North
Phone:	888-555-1212	360-397-1000
Industry:	Technology	Technology
Company Location:		Northwest Division
Vendor:	Yes	Yes
Address Line 1:		10000 NE 7th Avenue
Address Line 2:		Ste 401
Address Line 3:		
City:		Vancouver
State:		WA
ZIP/Postal:		98685
Country:		USA
Address Line 1:		10000 NE 7th Avenue
Address Line 2:		Ste 401

Finish Cancel

If a profile contains multiple items (such as groups) for an entity, click the Merge link to select the items to be added to the master.



The master will be created after clicking the Finish button in the Merge Companies dialog, and all records (incidents, problems, changes, etc.) will be associated with the master profile. The other selected profiles will be deleted.

5 Working with Incidents

Overview

Incidents can be created by:

- Support representatives completing fields in the Incident screen. You'll enter essential incident information, perform miscellaneous incident tasks such as searching for knowledge entries and attaching files, and do other post-entry tasks such as routing the incident. Incidents can also be created from the Problem and Change (if enabled) screens.
- Customers completing incident fields on the End User Desktop. The incident fields and the default EUD-submitted incident owner are set up during configuration. See "The End User Desktop" on page 31 for more information on the End User Desktop.
- Customers completing incident fields on the Mobile Desktop (if you have the Service Desk Edition). See "Mobile Desktop" on page 49 for more information on the Mobile Desktop.
- Customers submitting email. If set up during configuration, entries in an email mailbox are converted into incidents. The subject and body of the email are placed in the issue description of the incident, a link to the correspondence is included in the Audit History field, and attachments are placed on the Attachments tab of the correspondence. If the sender does not have a Customer Profile record, a new one is created.

  If configured, a template may be applied to newly created email-submitted incidents.

  An incident may be updated if an existing incident number is included in the subject or body of an email. Note that a space must be included before and after the number in order for the record to be updated. If configured, an acknowledgement email may be sent to the sender, and an email may be sent to the assignee of the record.

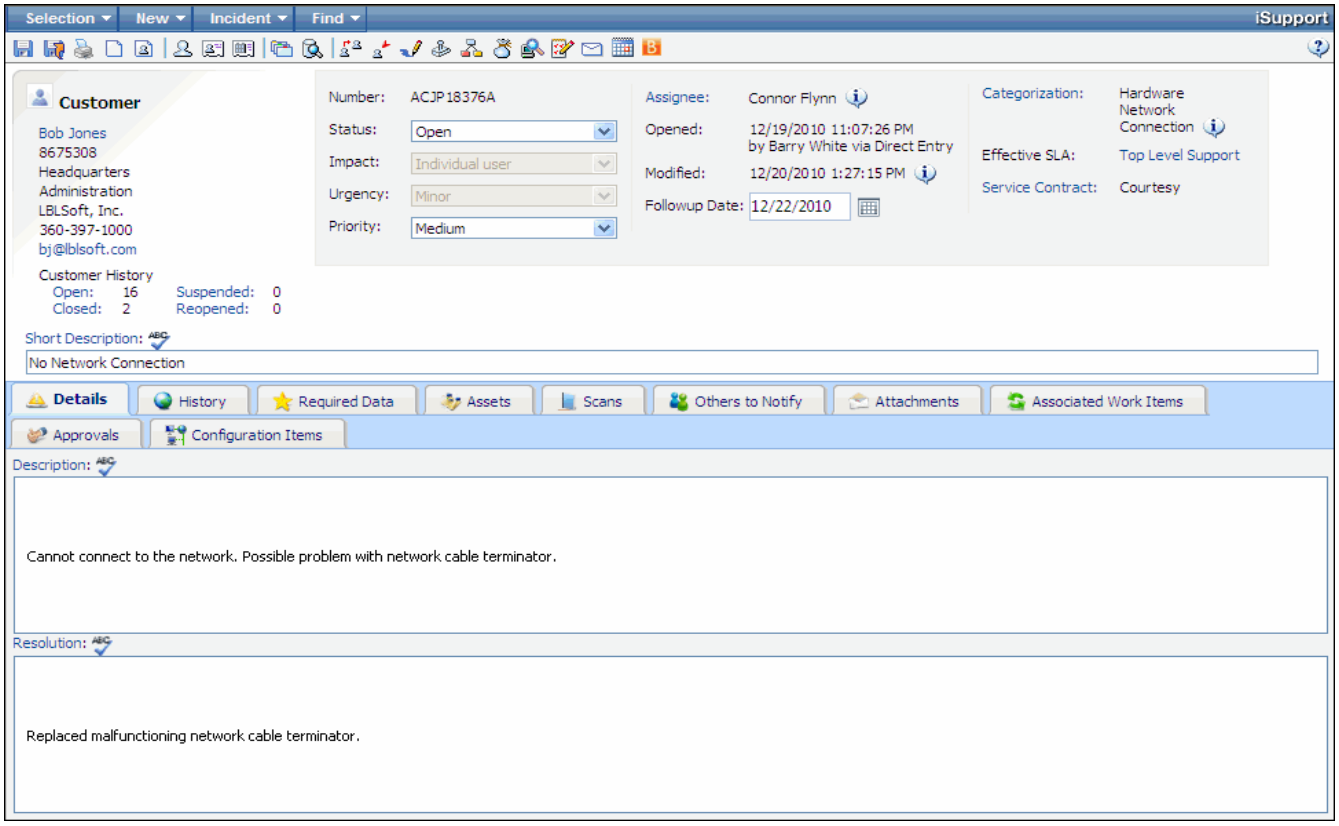
  Notifications may be sent to the individuals specified by administrators in configuration. On the Desktop, you can use the All/Open/Closed Incidents by Source views to display incidents that have been created by email processing, and the Unprocessed Email Submitted Incidents view to display email that has not been processed. On an email-processed incident or incident update, if there are names in the CC or TO field (other than the mail-in name) and Others to Notify is enabled, those names will be added to the Others to Notify list for the incident if there is a matching Customer Profile.

The *iSupport Administrator's Guide* contains information on setting up all incident functionality.

The fields on an incident are set up in the Configuration database. Fields or functionality may not display if disabled or disallowed due to permissions set during configuration. This chapter contains information on **all** incident functionality.

Required Information in the Incident Screen

The only information required in order for an incident to be saved is the customer, categorization, issue description, and any required custom fields. The issue resolution is also required in order for an incident to be closed. If configured, you may be required to enter time worked when you save the incident.



In This Chapter

This chapter contains the following on **entering essential incident information**:

- "Entering Customer Information" on page 175.
- "Selecting Additional Customers" on page 180.
- "Checking History for an Existing Customer" on page 178.
- "Selecting a Service Contract" on page 178.
- "Selecting Additional Customers" on page 180.
- "Using Incident Templates" on page 181.
- "Selecting the Status, Impact, Urgency, Priority, and Categorization" on page 182.
- "Completing Call Scripts" on page 185.
- "Describing the Incident" on page 185.
- "Scheduling Tickets" on page 187.
- "Saving the Incident" on page 189.
- "Accessing Outlook Calendar" on page 190.
- "Working With Approval Cycles" on page 192.

You can also perform the following **miscellaneous incident tasks while entering incident information**:

- "Completing Custom Fields" on page 199.
- "Associating Assets" on page 200.
- "Performing Asset Scans" on page 201.
- "Entering the Issue Resolution" on page 205.
- "Entering Work History" on page 210.
- "Viewing Work History, Customer Work History, and Audit History" on page 213.
- "Attaching Files" on page 215.

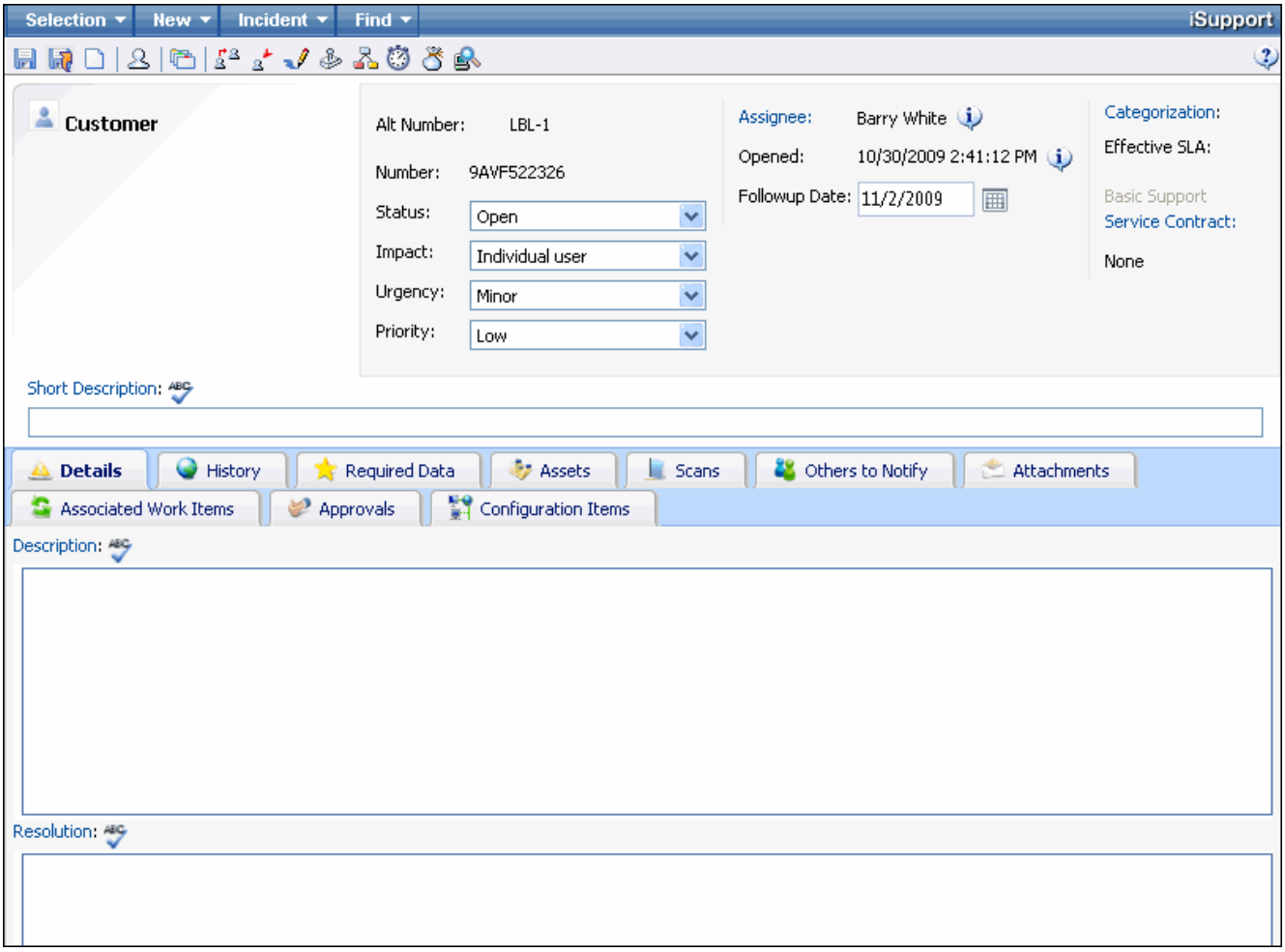
Information is also included on the following tasks you can perform **after entering incident information**:

- "Specifying Others to Notify" on page 215.
- "Associating Problems, Changes, and Purchase Requests/Orders" on page 216.
- "Associating Configuration Items" on page 216.
- "Sending an Email From an Incident" on page 217.
- "Associating Problems, Changes, and Purchase Requests/Orders" on page 216.

- "Assigning and Routing Incidents" on page 221.
- "Acknowledging a Routed Ticket" on page 228.
- "Viewing Historical Information and Related Documents" on page 228.
- "Viewing Incident Escalation" on page 229.
- "Creating Related Incidents" on page 233.
- "Using Hierarchy Templates" on page 237.
- "Sending a Survey" on page 252.
- "Printing Incidents" on page 253.
- "Using Bomgar Chat and Remote Control Functionality" on page 253.

Entering Essential Incident Information

This section includes information on completing the primary fields you'll use to document an issue. **To create an incident,** select Create | Incident on the Desktop action menu or press Ctrl+N.

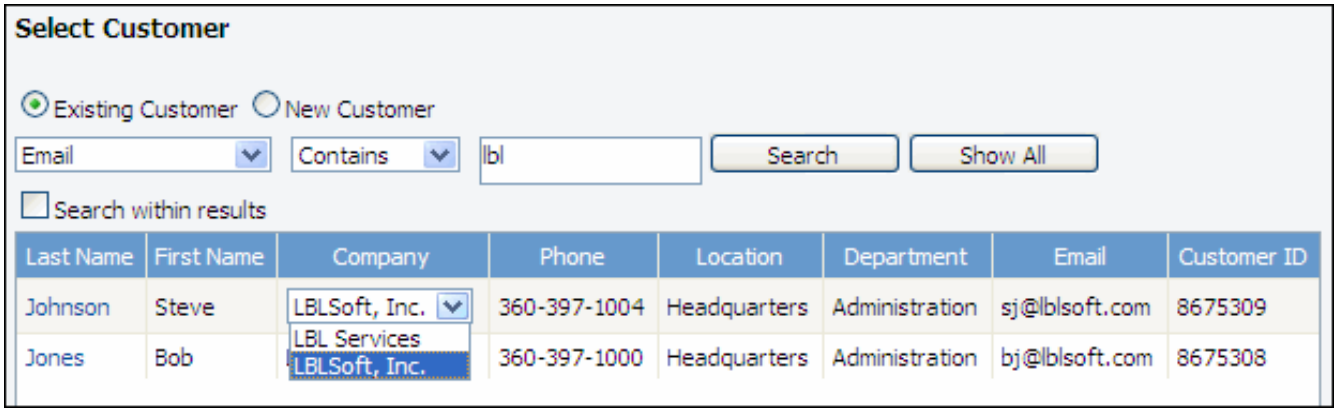


Entering Customer Information

If you are displaying an incident created from an email, the customer's name may not be included on the incident if the customer submitting the email did not have his/her name set up in their email application and did not have an email address that existed in Customer Profiles. To complete the customer's contact information, select Find | Customer | View Customer in the Incident screen, complete the appropriate fields in the customer's profile record, and save the record. Then select the customer in the Incident screen to populate the customer's name in the Name field.

If you are creating a new incident and customer lookups are enabled during configuration, a Select Customer dialog will display for you to select an existing customer or enter information for a new customer. To display a list of all customers, click the Show All button. You can search based on last name, first name, phone, location, email, company, customer, department, and customer ID and perform another search on the results if needed.

If the Related Companies feature is enabled in configuration, multiple companies can be assigned to a customer; click the dropdown to select the applicable company for the incident.

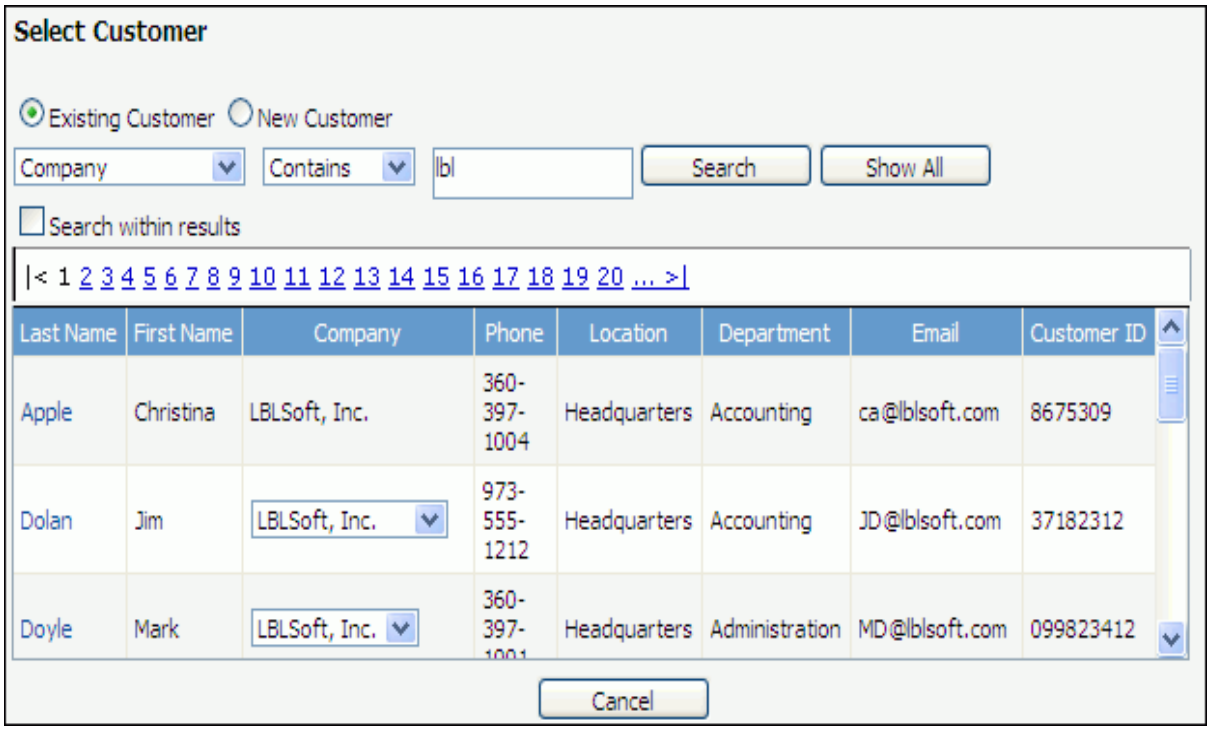


If this dialog is not enabled, select Incident | Select Customer or click the Select Customer icon.

- **To search for a customer,** select the title of the column in which your search should be performed and then select the type of search criteria (Contains, Starts With, Ends With, Is). Enter the search value and click Search.

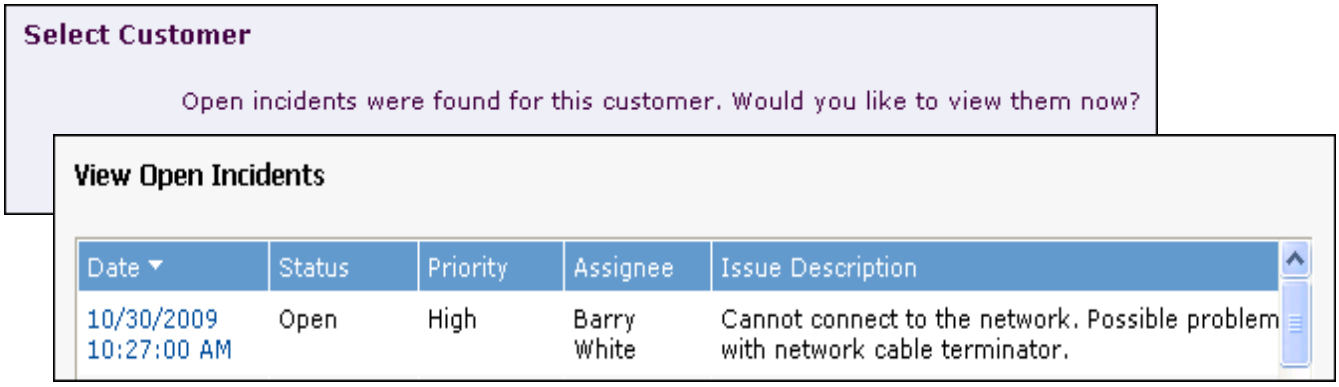
The selected column title is retained in a browser cookie; the next time you perform a search, the selection will display by default.

When the number of entries returned after a lookup exceeds 100, the results are displayed in pages of up to 100 entries. You can click on a number to quickly jump to a page.

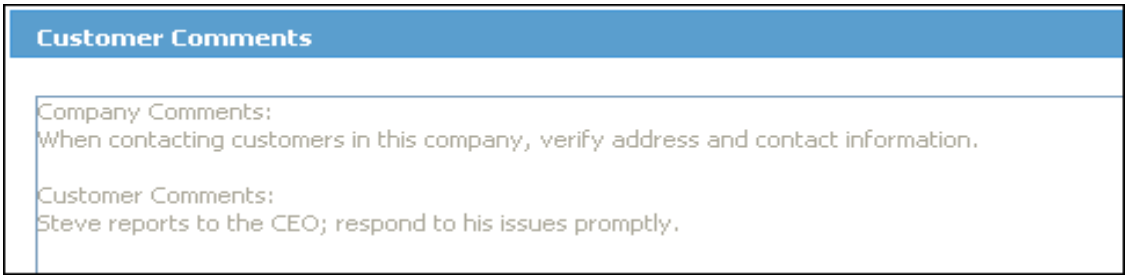


- **To select a customer,** click on the applicable name.

  If enabled during configuration, the following dialog will display if open incidents exist for the selected customer.

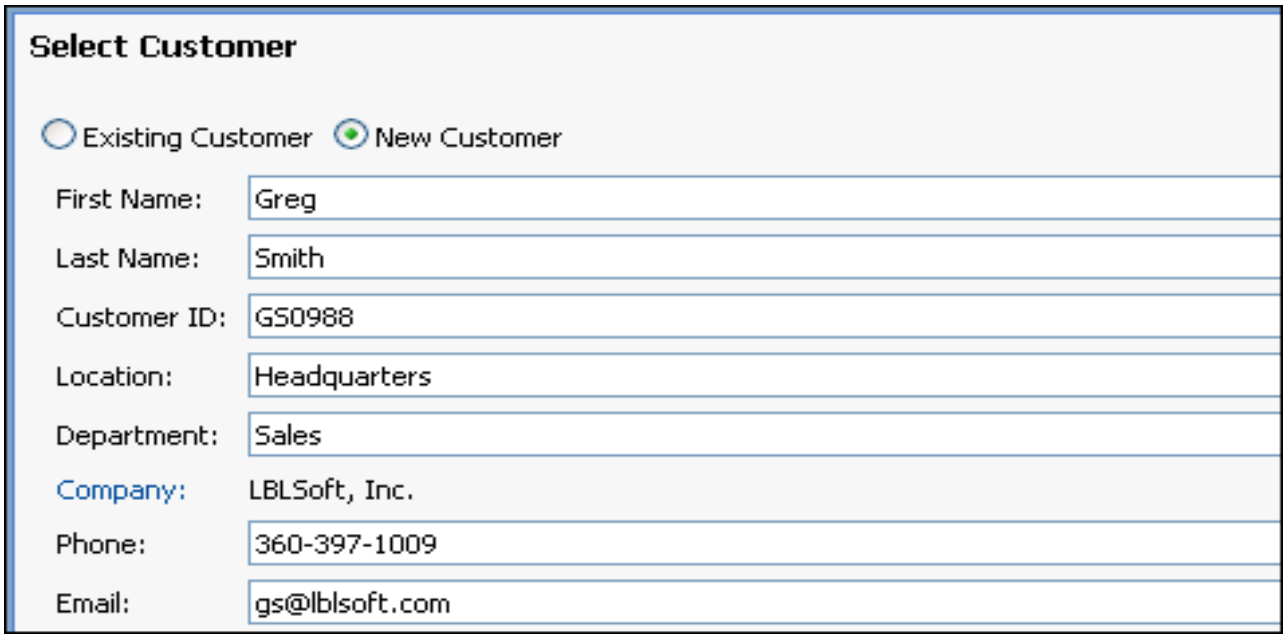


  If a comment was entered for the customer in their Customer Profile record and/or customer's company in the Company record, the comment appears; click OK.



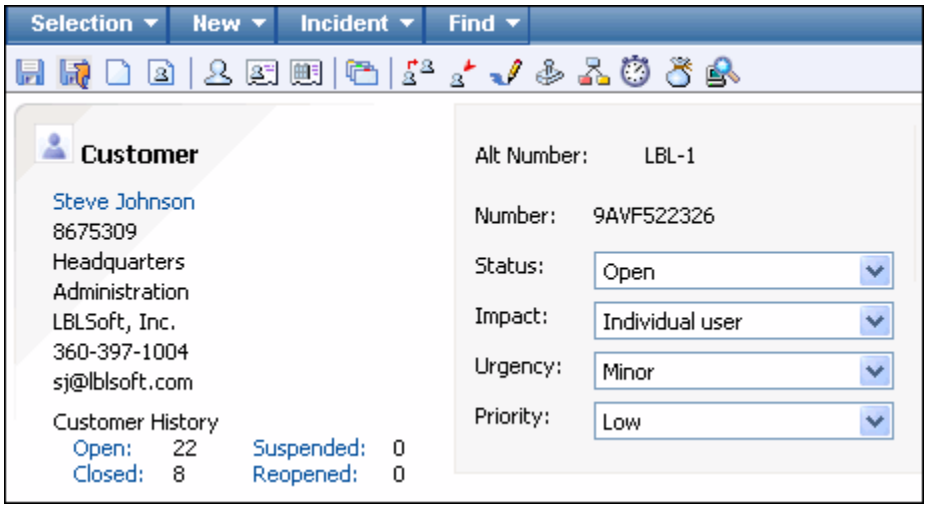
To display the customer's Customer Profile record, click the icon or select Find | Customers | View Customer.

- **To enter information for a new customer,** select New Customer and enter the customer's name and contact information. Note: each Customer Profile record must have a unique email address and first and last name combination. The New Customer option in this dialog may not appear if specified during configuration.



After saving and exiting the incident, you can complete the new customer's profile information.

After a customer is selected or new customer information is entered, the information appears in the Customer section.



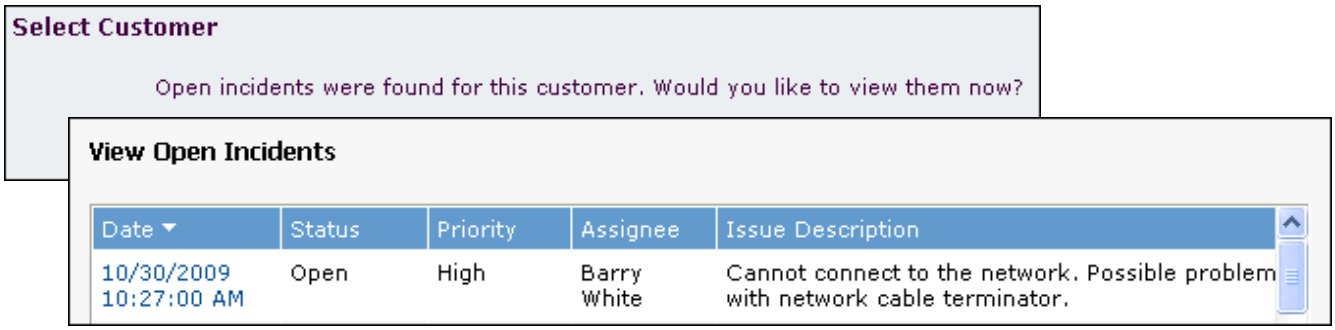
If you need to change an existing customer's profile information, click the View Customer Profile icon or select Find | Customers | View Customer.

To view information on the customer's company, click the View Company Profile icon or select Find | Customers | View Company.

To create a new incident for the same customer and populate the customer information fields, click the New Incident Same Customer icon or select New | Incident Same Customer. If configured, the assets associated with the company and customer will appear for selection. (The Show All option will be included as well.)

Checking History for an Existing Customer

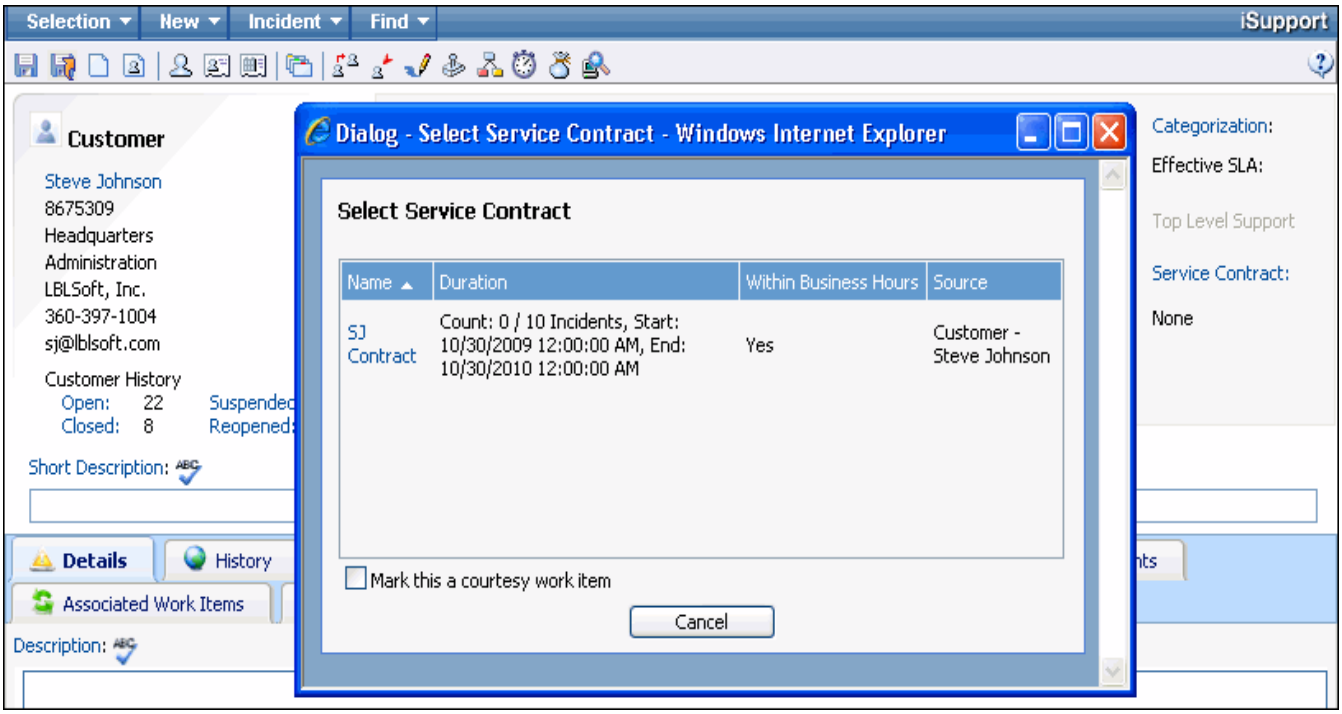
When you select an existing customer, a search is performed for the customer's open incidents. This allows you to update an existing incident if the current issue applies. If incidents exist for the customer, the following prompt appears; if you answer Yes, a list of open incidents assigned to that customer will display. Click on an incident to open it. You can also display a list of all open incidents for a customer by selecting Find | Incidents | Open Incidents | For Customer.



Selecting a Service Contract

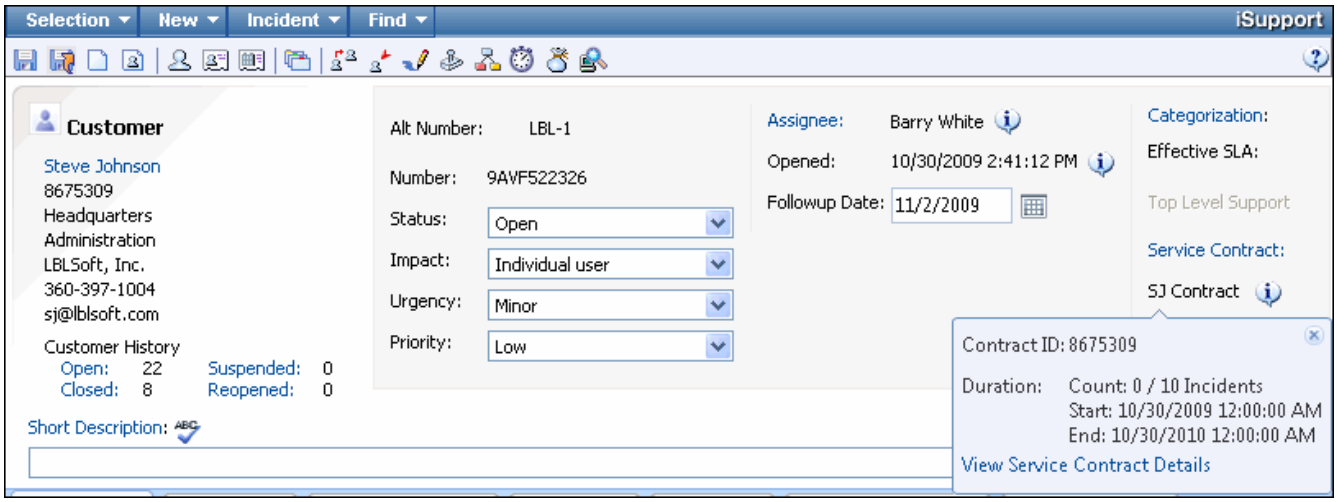
iSupport's Service Contract functionality tracks and restricts incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe. If Service Contract functionality is enabled in configuration and a service contract is

associated with the selected customer, customer's company, or customer's asset selected for the incident, the following dialog will appear:



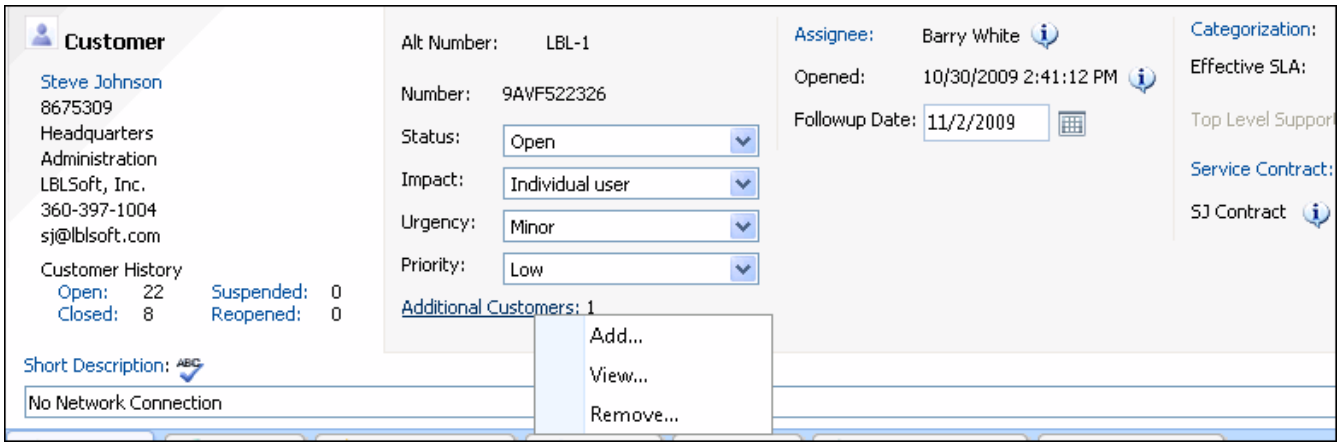
The Mark This a Courtesy Work Item checkbox will appear if enabled in configuration. Select the service contract to which the incident should be applied or select the Mark This a Courtesy Work Item checkbox if you do not wish to count the incident against a contract. If you selected a contract, the change will be counted against it when the record is initially saved.

After selecting a contract, the contract name appears in the Service Contract field. You can click the Information icon to display the contract ID and duration. You can click the View Service Contract Details link to display the contract in the Service Contract screen.



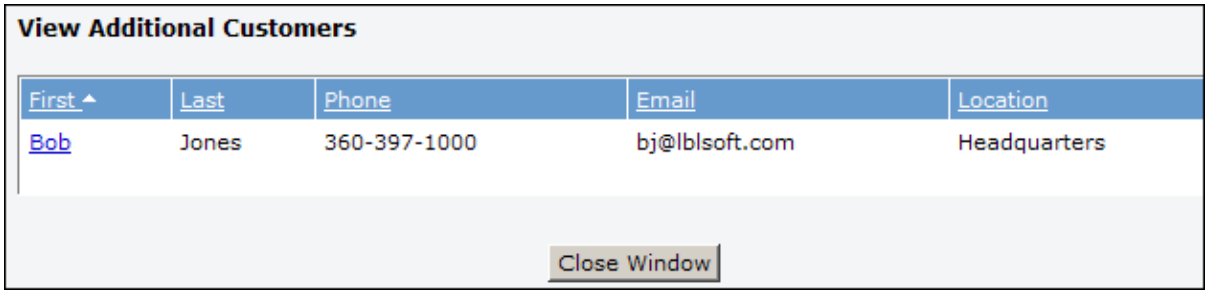
Selecting Additional Customers

If there are numerous customers reporting the same issue, you can add customers to the incident.



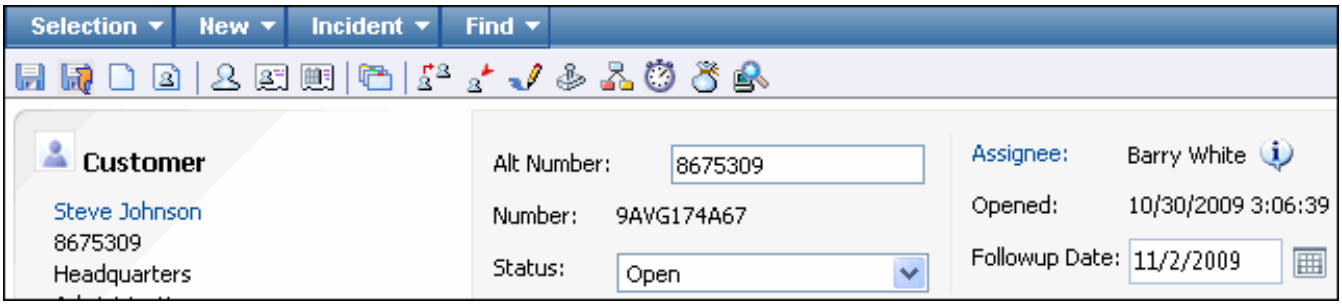
To associate additional customers with an incident, select Incident | Add Additional Customer. The Add Customer dialog appears for you to select the additional customers. The Additional Customers link appears once an additional customer has been selected. Additional customers cannot view the incident on the End User Desktop and will not receive notifications configured to be sent via iSupport.

To view the additional customers on an incident, click the Additional Customers link and select View or select Find | Customers | Additional Customers.



Entering a Custom Number

A custom number field may be configured for the Incident screen; the number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. If configured, the field may be read-only after you enter the number and save the record. This field will appear above the Number field in the Incident screen; in the example below, the field is labeled "Alt Number".



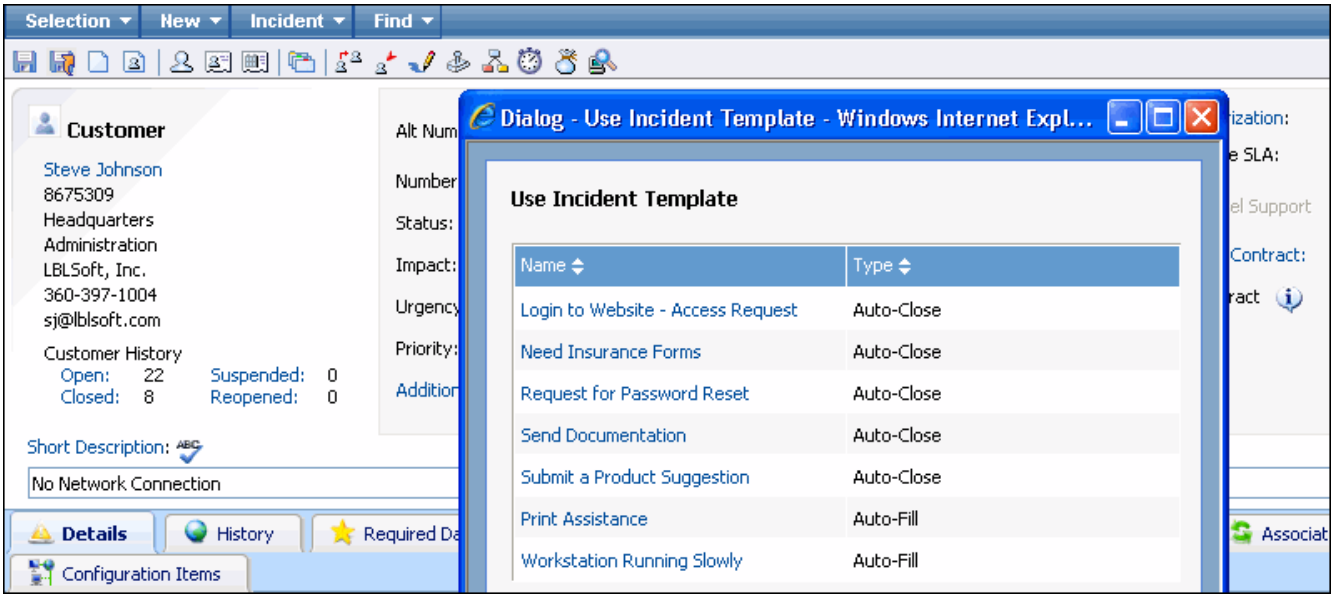
Using Incident Templates

Incident templates populate the following fields in the Incident screen with information set up during configuration: Categorization, Short Description, Issue Description, Issue Resolution, Priority, Assignee, Followup Date (if configured), and Time Worked (if configured). A script will appear if associated with the categorization. A template can also be configured to automatically close; if you select an auto-close template, the status of the incident will change to Closed and the incident window will close (unless required fields are blank).

An SLA may be assigned to a template. If you select a template with an SLA, the SLA assigned to the template will replace any existing SLAs that may be in effect (for the category, customer, or company). For more information on custom SLAs, see "Service Level Agreements" on page 155.

To use an incident template, click the icon or select Incident | Use Incident Template.

A dialog appears containing a list of predefined template names; select one and click OK.



The template fills in the Categorization, Short Description, Issue Description, and Issue Resolution, Assignee, Priority, and followup date fields. Templates can be configured to append or replace the text in the Short Description, Description, and/or Resolution fields.

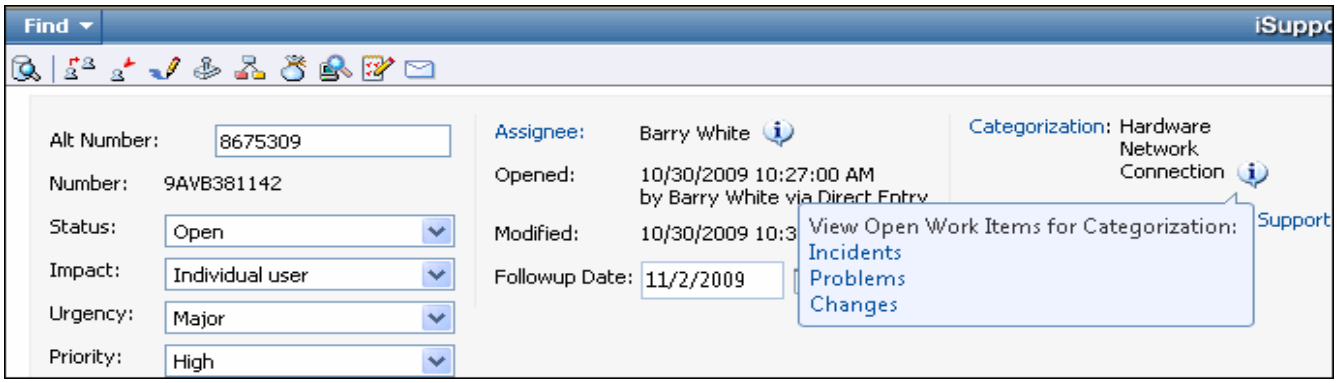
If you selected an auto-close template, the incident status changes to Closed and the window closes automatically. If configured, the time spent on the incident is recorded in the Time Worked field.

If you selected an auto-fill template (one that does not auto-close), the incident will remain open. A script will display if associated with the categorization.

Hierarchy templates can also be used to populate incident fields; for more information, see "Creating Incident Hierarchy Structures" on page 233.

Selecting the Status, Impact, Urgency, Priority, and Categorization

The upper portion of the Incident screen includes fields for setting the incident status, incident priority, and categorization.



Setting the Incident Status

Use the Status field to designate the incident status. There are four basic status levels: Open, Suspended, Closed, and Reopened. Different labels can be set up in the Configuration module for those basic status levels. Statuses may be assigned via the Scheduling and Approval features if configured.

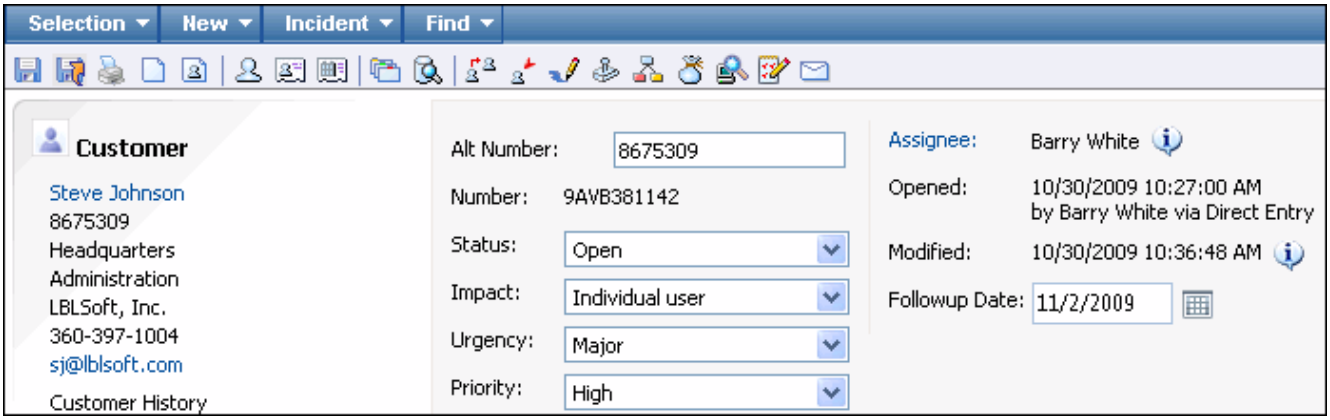
If the issue will take awhile to resolve (for example, you are waiting to hear back from the customer), you can use the Suspend status to stop escalation. When the status is changed to Open, escalation will continue, taking into account the time that has elapsed since the incident was suspended. (You can display a list of suspended incidents using views on the Desktop.) Select the Closed status to close the incident.

Setting the Incident Priority

Select the priority (Low, Medium, High, and Emergency) for the severity of the issue in the Priority field. Priority levels can be associated with time frames in the escalation of service level agreements, so you'll need to consult with your administrator regarding escalation time frames in order to understand how quickly incidents must be resolved.

If enabled in the Configuration module, prioritization can encompass urgency (based on the amount of time a resolution is needed) and impact (usually the number of users affected). The Impact and Urgency values are defined and associated with the priority levels of Low, Medium, High, and Emergency in configuration; these defined values will be available in the Impact and

Urgency fields for selection. The mapped priority will appear as default but all priority levels are available if permissions are configured for you to change the priority.



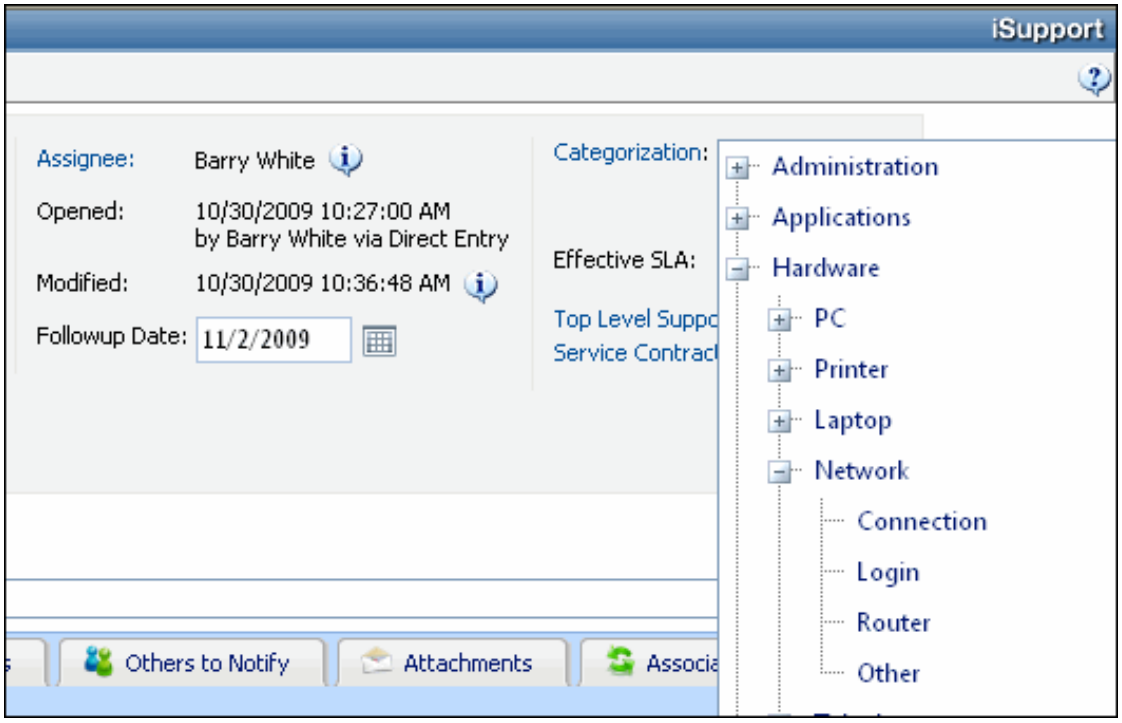
Examples of Impact, Urgency, and Priority mappings include:

Impact	Urgency	Priority
Individual	Minor	Medium
Department	Major	High
Company-wide	Minor	Medium
Company-wide	Critical	Emergency

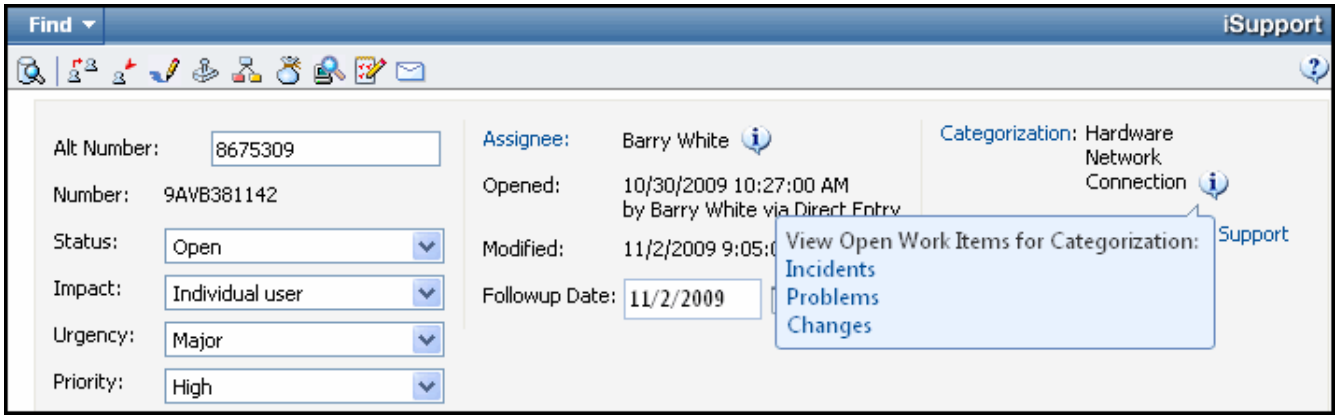
Categorizing the Incident

Categories are used for routing and reporting, and associate incidents with service level agreements, scripts, and knowledge entries. Categories are enabled in sets of up to five levels; the first level is fairly general and the last level is fairly specific.

To select a category set for an incident, select Incident | Categorize, click the Categorize icon, or click the Categorization link. A dropdown appears containing predefined categories; expand the entries and select the one that best describes the issue.



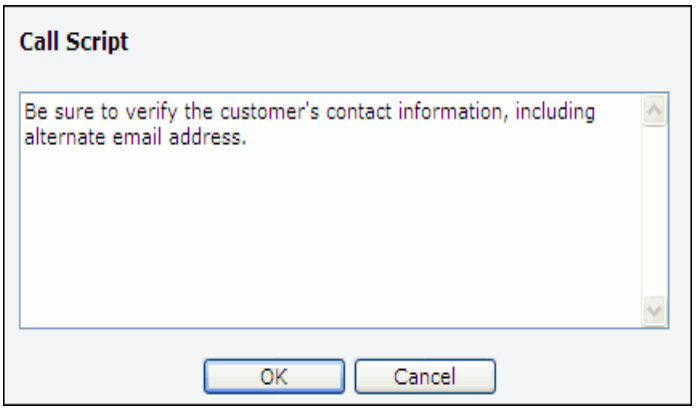
If a categorization is selected that matches the categorization of an existing Incident, Problem, or Change record (if enabled), a View Open Work Items For Category popup will appear as shown below.



You can recategorize an incident at any time while the incident is open.

Completing Call Scripts

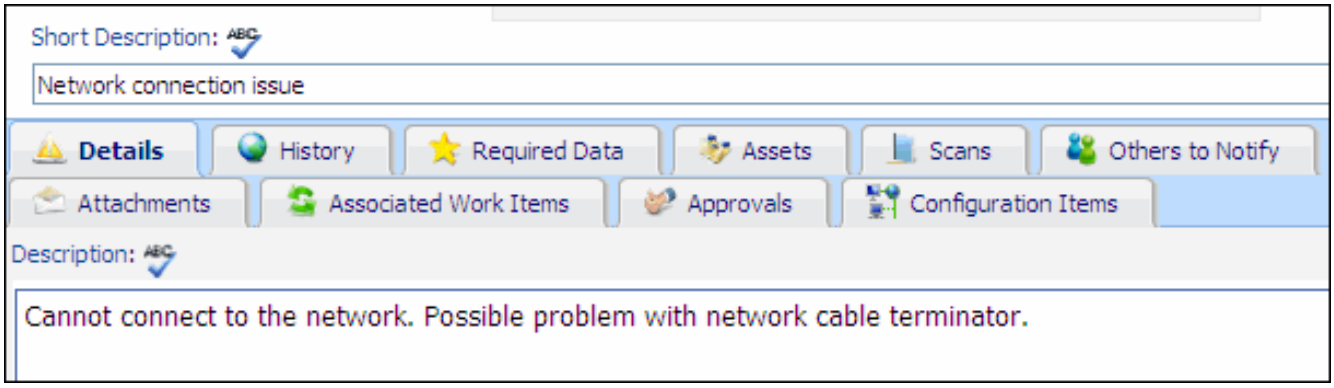
Call scripts are associated with specific category combinations and can contain instructions on gathering information from a customer, a list of questions to ask the customer, or other related items. If a call script is associated with the selected category set, the script appears in a dialog when the category set is selected. Follow the script, enter responses to questions if applicable, and click OK.



If enabled in configuration, the information will be automatically entered in the Work History field. If you need to display the call script later for reference, select Find | Call Script.

Describing the Incident

Use the Short Description field to enter an abbreviated description of the incident, and use the Description field on the Details tab to enter a longer description of the incident. You can click the icon to spell-check your entries.



The content in the Description field may be sent to customers in an email notification regarding the incident, depending on options set in the Configuration module. Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Description field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

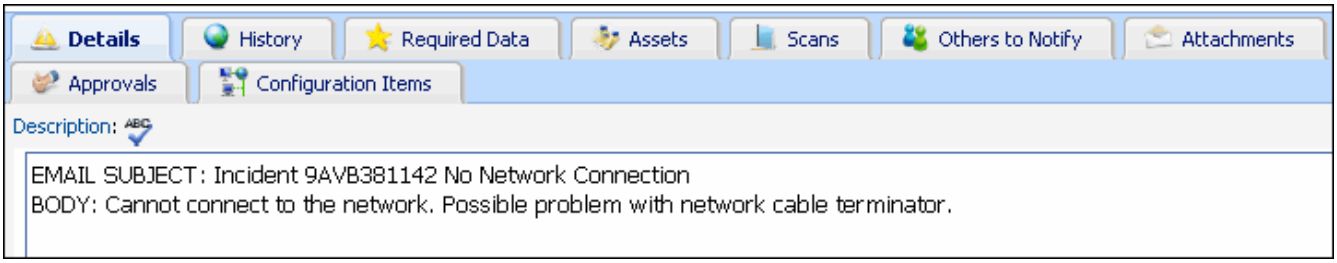
You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

When you cut and paste HTML in these fields, the HTML may contain interpretable command language which may result in undesired effects. If this occurs, remove the content from the field. You can use screenshots and attachments as an alternative.

Email Submissions

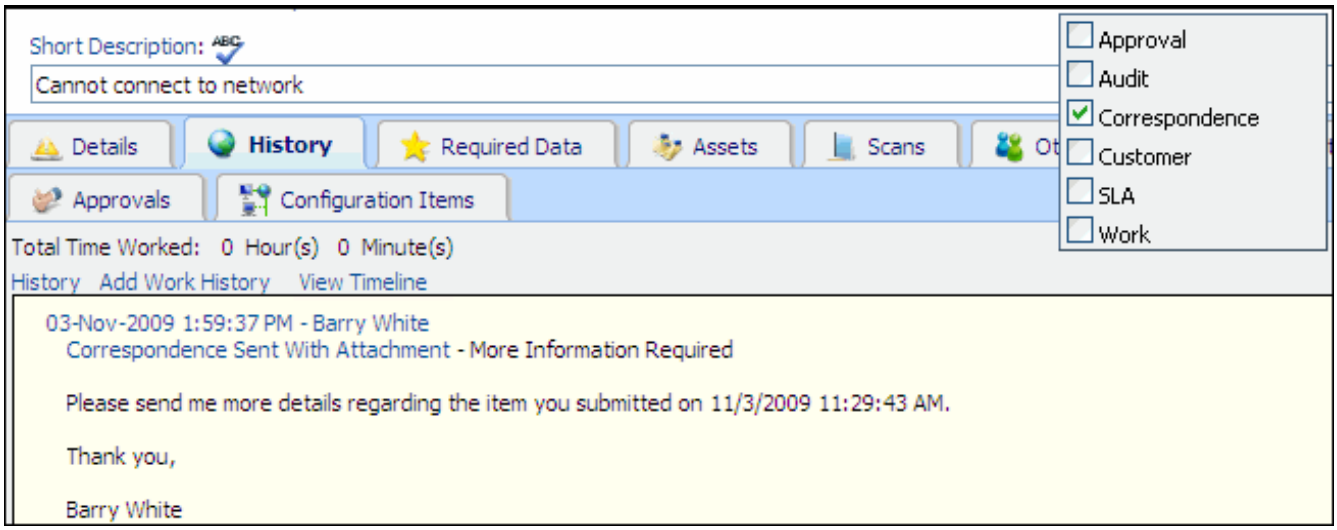
If an incident is created from an email submission, the subject line and body of the email are placed in the Description field.



A link to the correspondence is included in the Correspondence History, and attachments are placed on the Attachments tab of the correspondence. If there is an alternate version of the body of the email (created by the email application), if configured it will be saved as a document and placed on the Attachments tab of the correspondence.

If an existing incident number is included in the subject or body of the email, depending on configuration settings, an incident may be created or the incident may be updated with a notation

and correspondence link in the Audit History field. The link will indicate whether any files were attached to the correspondence.



An email may be sent to the sender's email address acknowledging receipt of the email, and email may be sent to the assignee of the updated incident. The email will contain a link to the updated incident.

Scheduling Tickets

You can schedule one or more tickets to be created with an open status at a future date/time. You can schedule a single occurrence ticket or, if configured, a recurring set of tickets. Scheduled tickets are assigned the open status by the Ticket Scheduling agent. You must complete the scheduling dialog before the ticket has been saved.

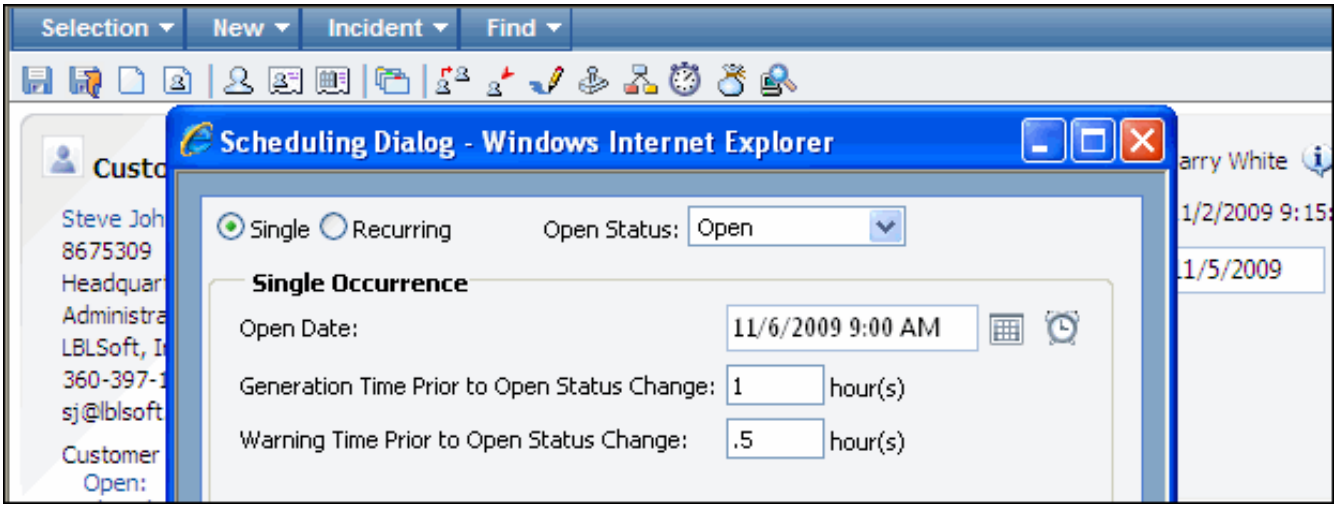
You can generate scheduled tickets prior to the time at which the status changes; when this occurs, the scheduled tickets have a Scheduled status and all fields can be updated except the Status field. The SLA will not go into effect. When the specified open date/time is reached on a scheduled ticket, the status will change to the specified open status and the SLA will go into effect using the open date/time.

In the Incident screen, select Incident | Ticket Scheduling or click the Schedule Ticket icon to display the Scheduling dialog.

Scheduling a Single Occurrence Ticket

In the Open Date and Start Time field, enter the date and time at which the status should be changed to an Open status, and use the Open Status field to select the status. When the open

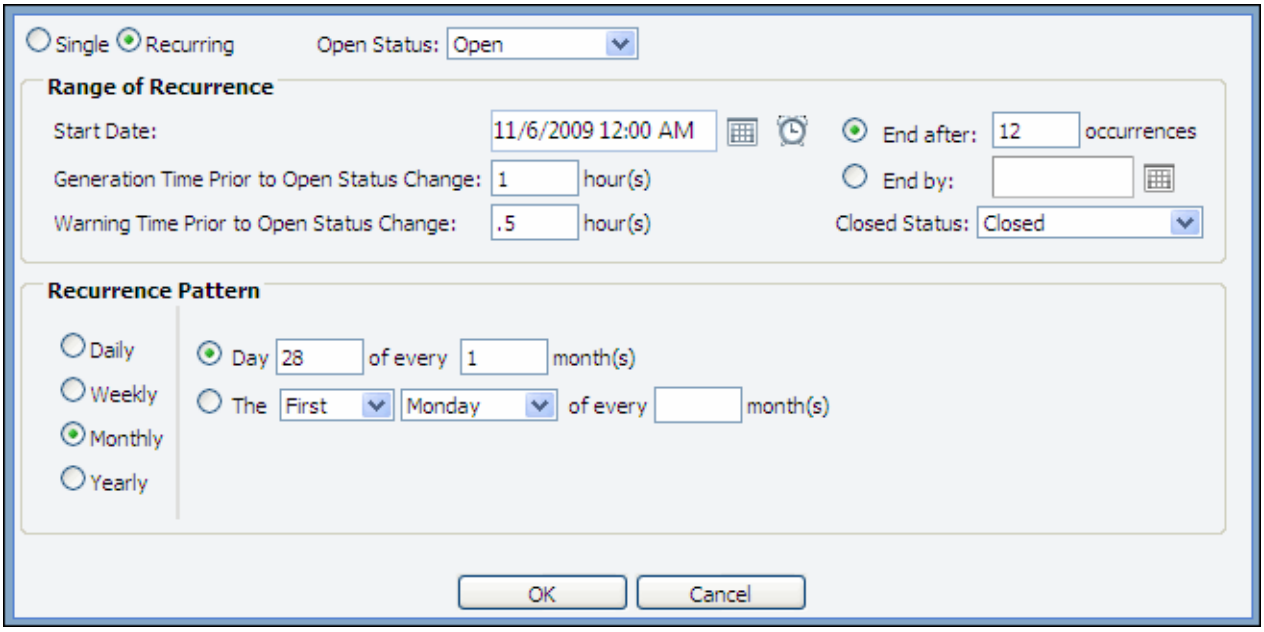
date/start time is reached, the scheduled ticket will become a normal open incident ticket and the SLA will go into effect. No new tickets are created for a single occurrence schedule.



If you wish to create the ticket prior to the open status change, select the amount of time in the Generation Time Prior to Open Status Change field. The ticket will have a status of Scheduled until the date and time in the Open Date and Start Time fields. (Note that the SLA will not go into effect until the open date and start time.) To send a warning notification a specified amount of time before the open status change, select the time in the Warning Interval Prior to Open Status Change field.

Scheduling Recurring Tickets

If configured, you can select Recurring to create a new ticket on a repeated basis at a specified date/time. When tickets are created on a recurring basis, the ticket on which you set the schedule will close automatically when the final ticket is created from it.



In the Start Time field, enter the time at which the status should be changed to an Open status, and use the Open Status field to select the status. If you wish to create the tickets prior to the open

status change, select the ticket creation time in the Generation Time Prior to Open Status Change field. Notifications may be configured to be sent at that time. The tickets will have a status of Scheduled until the date and time in the Open Date and Start Time fields. (Note that the SLA will not go into effect until the open date and start time.)

To send a warning notification a specified amount of time before the open status change, select the time in the Warning Interval Prior to Open Status Change field.

Selecting the Date Range and Close Status

In the Start Date field, select the date on which the first ticket should be created. Use the End After field if you wish to create a specified number of tickets; use the End By field if you wish to end the ticket creation schedule on a specified date. When the final ticket is created, the ticket on which you set the schedule will close; use the Closed Status field to select the Closed status to assign to it.

Notations are included on the History tab on all tickets created from the schedule. Once the originating schedule is closed, you can view it via one of these notations in a ticket created from the schedule.

Selecting the Recurrence Pattern

Use the Recurrence Pattern section to specify how tickets should be created on a repetitive basis:

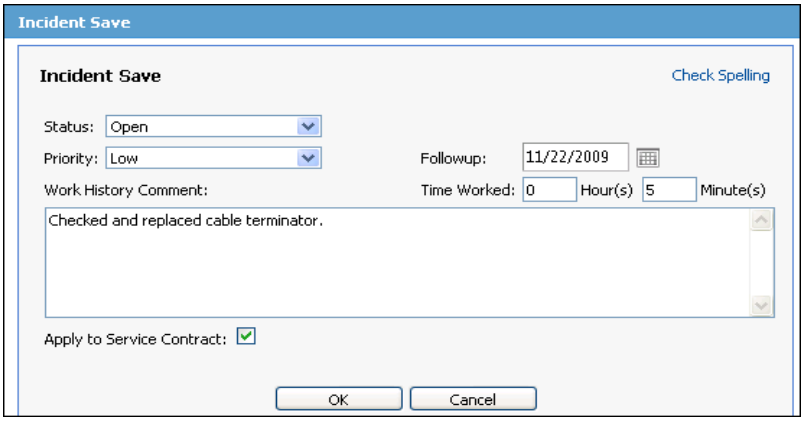
- Select Daily to create a ticket every weekday or specified number of days.
- Select Weekly to create a ticket on a specified weekday (Sunday-Saturday) for an interval of a specified number of weeks.
- Select Monthly to create a ticket for an interval of a specified number of months. Then select the day of the month on which each ticket should be created.
- Select Yearly to create a ticket yearly on a specified month and date or specified day of the week on a specified month.

Saving the Incident

Do one of the following:

- To save an incident without closing the window, select Save from the Selection menu, press Ctrl+S, or click the Save icon.
- To save the incident and close the window automatically after completing the Incident Save dialog, select Save and Close from the Selection menu or click the Save and Close icon on the toolbar.

If configured, the Incident Save dialog appears:



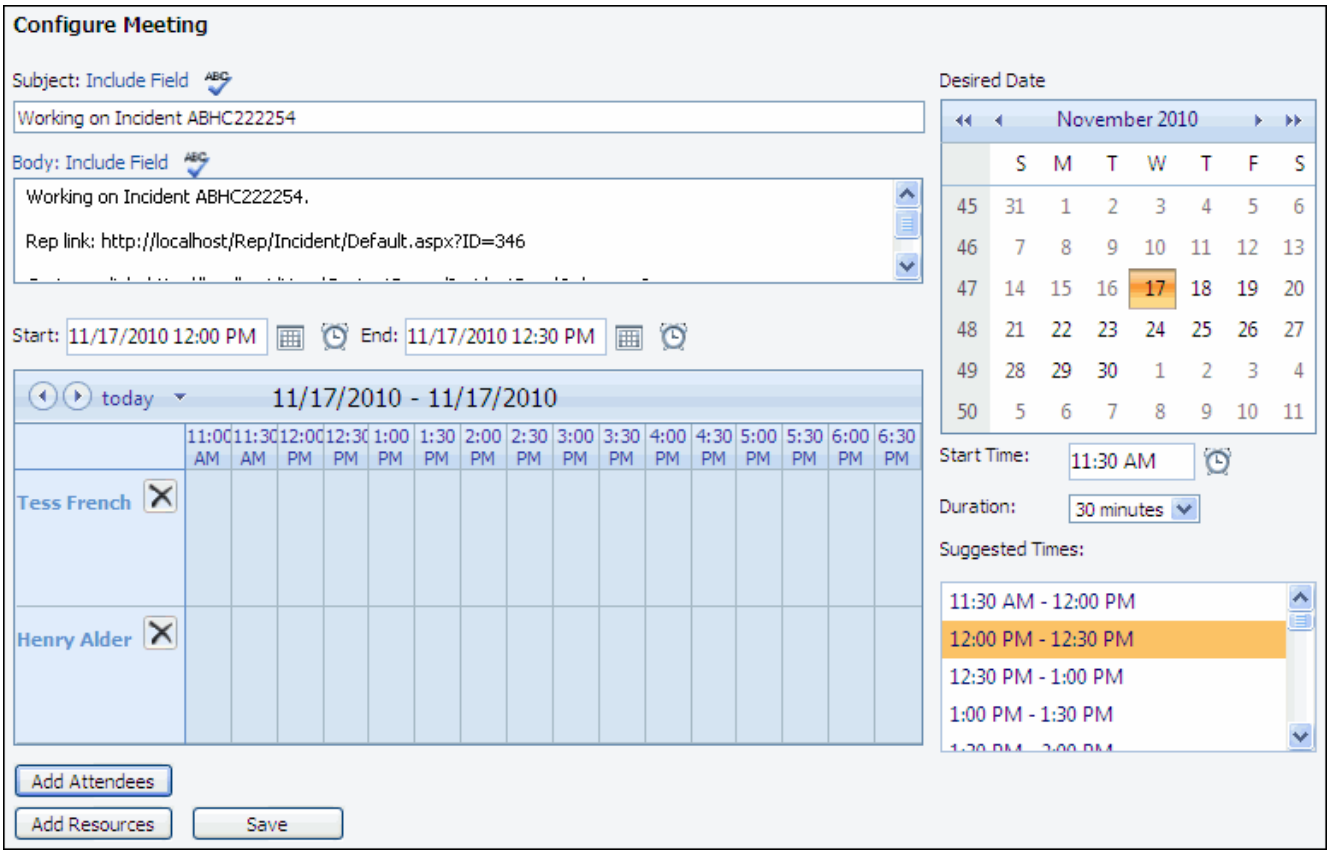
Do the following:

- Select the status of the incident in the Status field.
  - If the issue will take awhile to resolve (for example, you are waiting to hear back from the customer), you can use the Suspend status to stop escalation. When the status is changed to Open, escalation will continue, taking into account the time that has elapsed since the incident was suspended. You can display a list of suspended incidents using views on the Desktop.
  - If the issue is resolved, select Closed. If configured, a prompt will appear for creating a knowledge entry using the categorization, issue description, and issue resolution. The knowledge entry will have a status of Pending Approval.
- Select the priority for the severity of the issue in the Priority field. Priority levels are associated with time frames in the escalation of service level agreements, so you'll need to consult with your administrator regarding escalation time frames in order to understand how quickly incidents must be resolved.
- Enter the hours and minutes you worked on the incident in the Time Worked field. (You can also enter this information on the Work History tab.) If enabled during configuration, you may be required to complete this field.
- If the Followup Date field is enabled during configuration, select the date on which, if the incident is not closed, a followup reminder email should be sent to the assignee of the incident.
- If an hours-based service contract is in effect for the incident, select the Apply to Service Contract checkbox to apply the amount entered in the Time Worked field to the contract.

Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Incident screen after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules of meeting

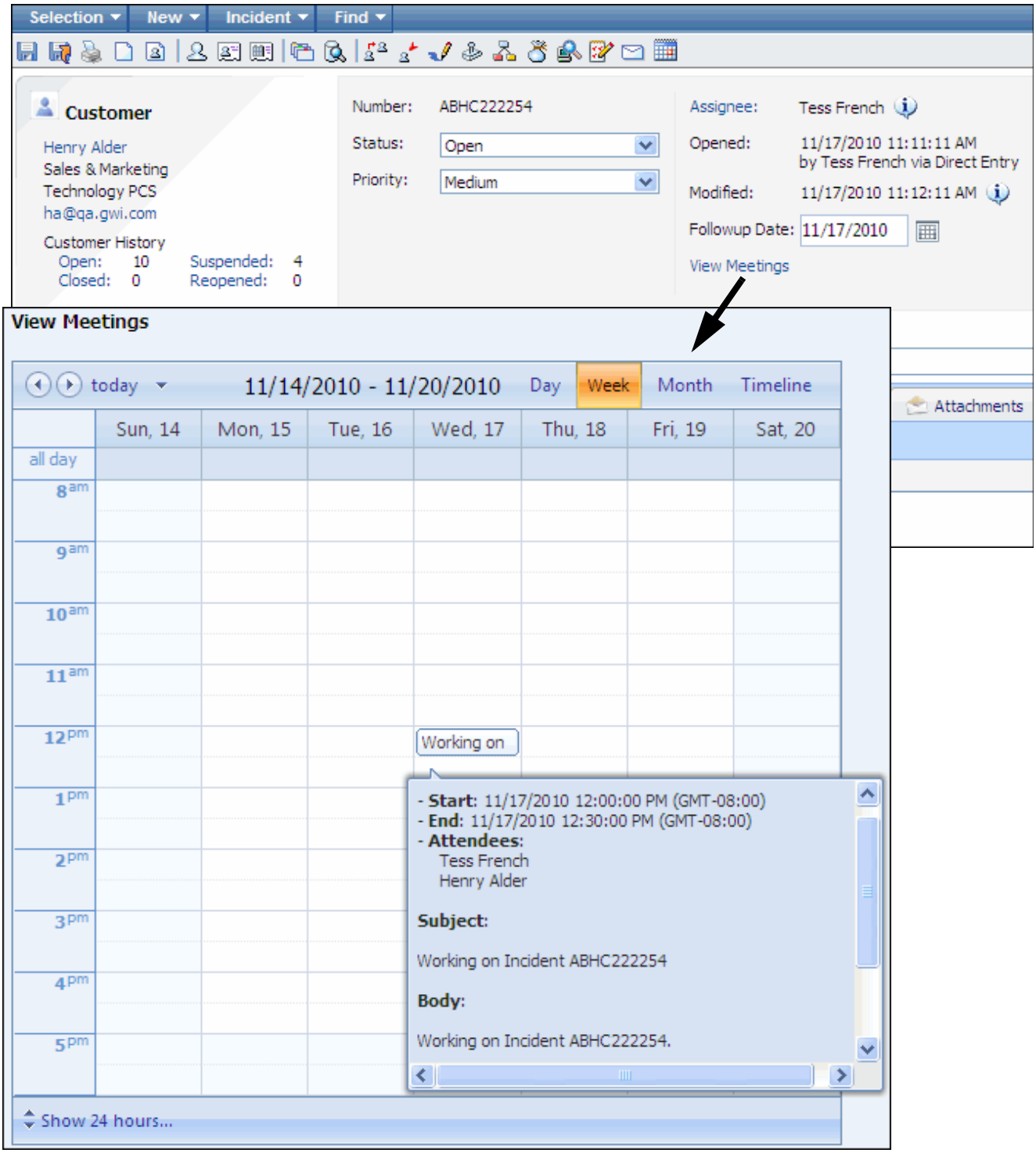
attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Incident *<incident number>*" will be included by default in the meeting entry along with a link to the record via the Desktop and End User Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees. The customer and assignee is added by default.

After saving, the View Meetings link will appear in the Incident screen for displaying meeting details.



Working With Approval Cycles

Approval cycles require tickets to be approved by designated approvers before most incident functions can be performed. Approval cycles are set up in the Configuration module, configured

with serial or concurrent approvers, notifications, and statuses for each stage of the process. Approvers can be support representatives or customers (who specify a verdict via the End User Desktop). An approval cycle can be associated with a customer profile, company record, or category.

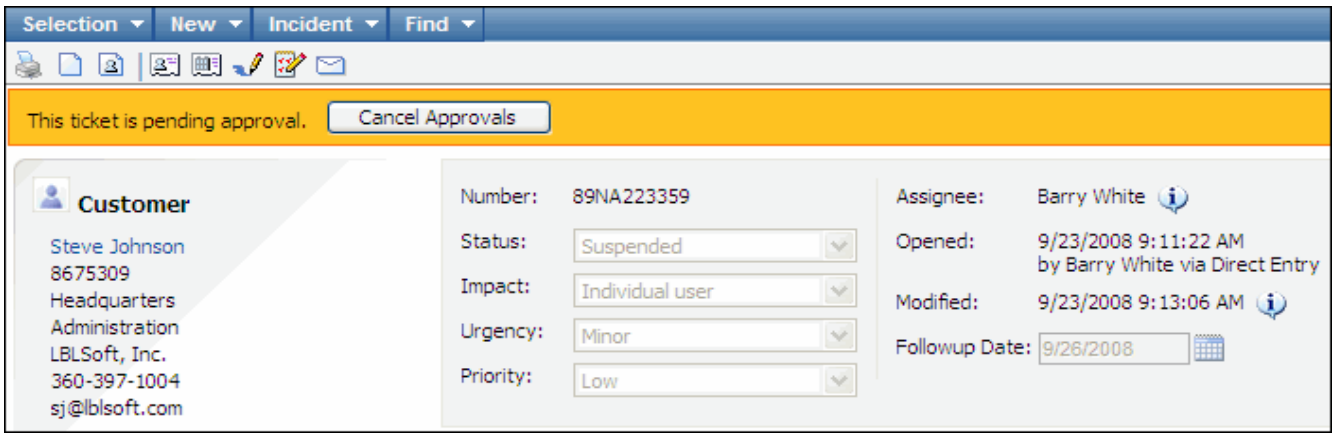
A service level agreement can require one or more approval cycles to go into effect:

- The initial approval cycle
- Any cycles associated with a customer profile, company record, or category
- The final approval cycle

Approval functionality is not affected by the business hours configured for an SLA. When an incident is saved with a service level agreement that requires approvals, the approval cycle will go into effect automatically. If any approval cycle results in a Decline verdict, no further cycles will apply. If an SLA-required cycle is completed or cancelled, the Incident menu will contain an Initiate Approvals option to restart the approval process.

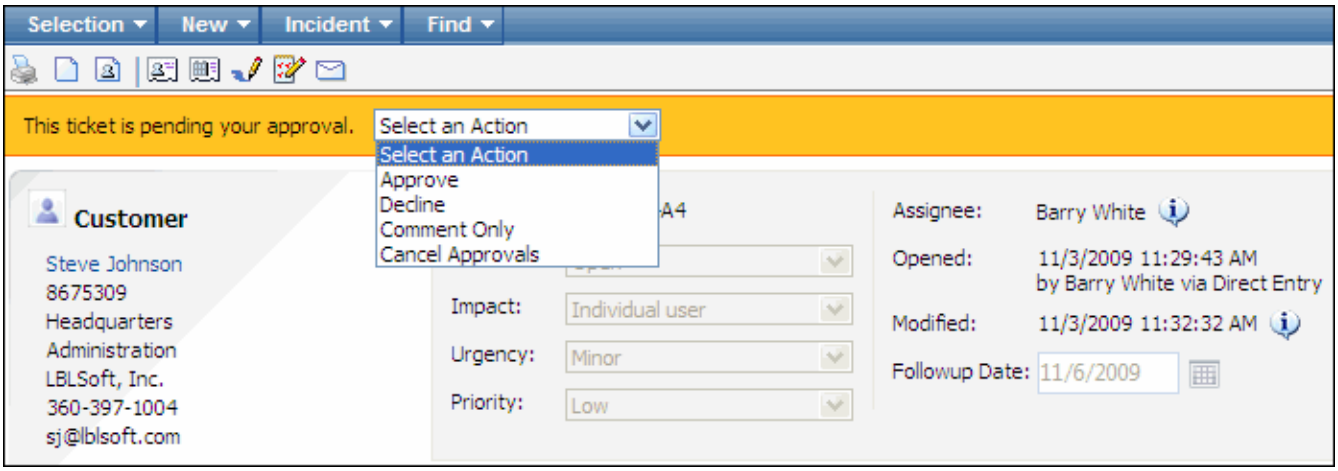
Approval cycles can also be designated as available for you to initiate in the Incident screen on an ad hoc basis if the incident is not currently pending approval.

If an approval cycle is in effect, an alert bar will appear at the top of the Incident screen after the incident is saved and most of the ticket fields will be disabled. (However, you can send correspondence and update work history.)



Specifying a Verdict

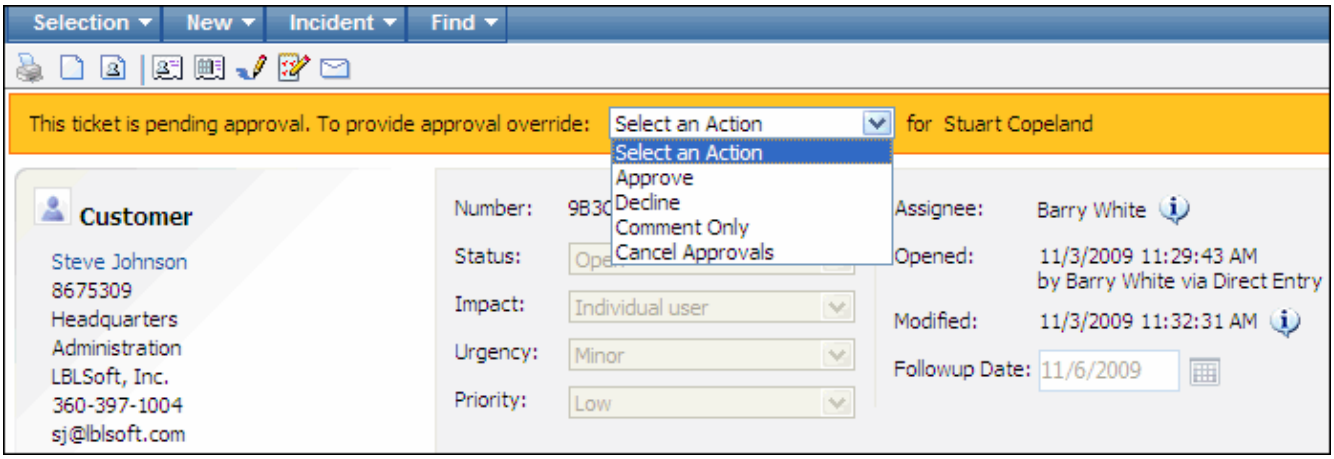
An action dropdown field will appear in the approval alert bar if you are the current approver in the approval cycle or if you have permission to override approvals.



Select one of the following:

- **Approve** to enable the next approver to specify a verdict or, if it is the final approval, complete the cycle.
- **Decline** if you do not wish to enable functionality on the ticket. An entry will be required in the Comments field. One or more Decline verdicts may be needed to stop the cycle.
- **Comments Only** to enter any comments without approving, declining, or cancelling the cycle. The comments will be included in notifications sent to recipients configured for the approval cycle.
- If you have permissions, you can specify **Cancel Approvals** to cancel the cycle. An entry will be required in the Comments field; the comment will be appended to the text in the Resolution field. An approval cycle can also be cancelled by the customer assigned to the ticket.

If you are not the current approver but you have approval override, the following will appear:



When you specify a verdict, configured notifications will be sent and the incident status changes to the status designated by the approval cycle if it is a cancellation, final approval, or final decline.

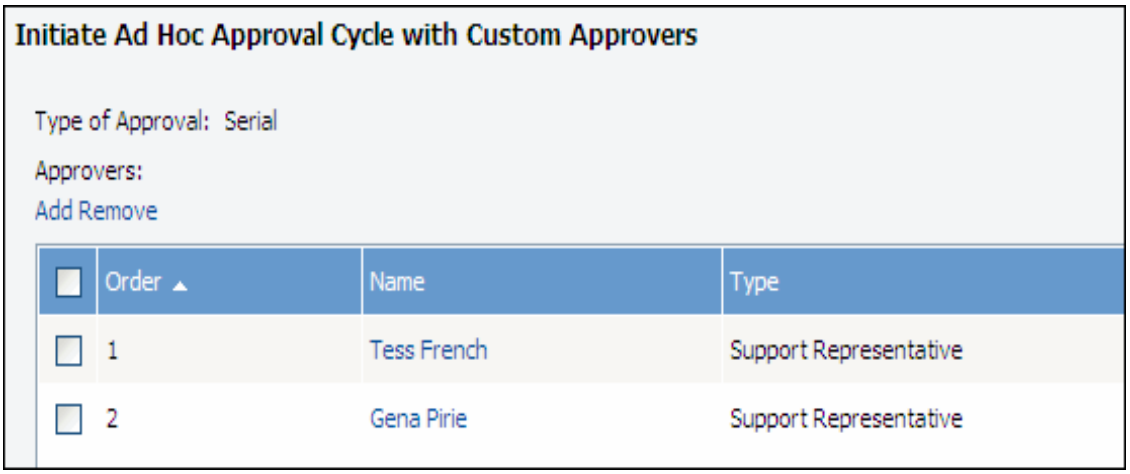
If an SLA-required cycle is completed or cancelled, the Incident menu will contain an Initiate Approvals option to restart the approval process.

Initiating an Approval Cycle

To initiate an approval cycle in the Incident screen, select Incident | Initiate Ad Hoc Approval after an incident has been saved. The following dialog appears with the approval cycles designated as available for ad hoc use. The cycle will be enabled for the incident after the Initiate button is clicked.

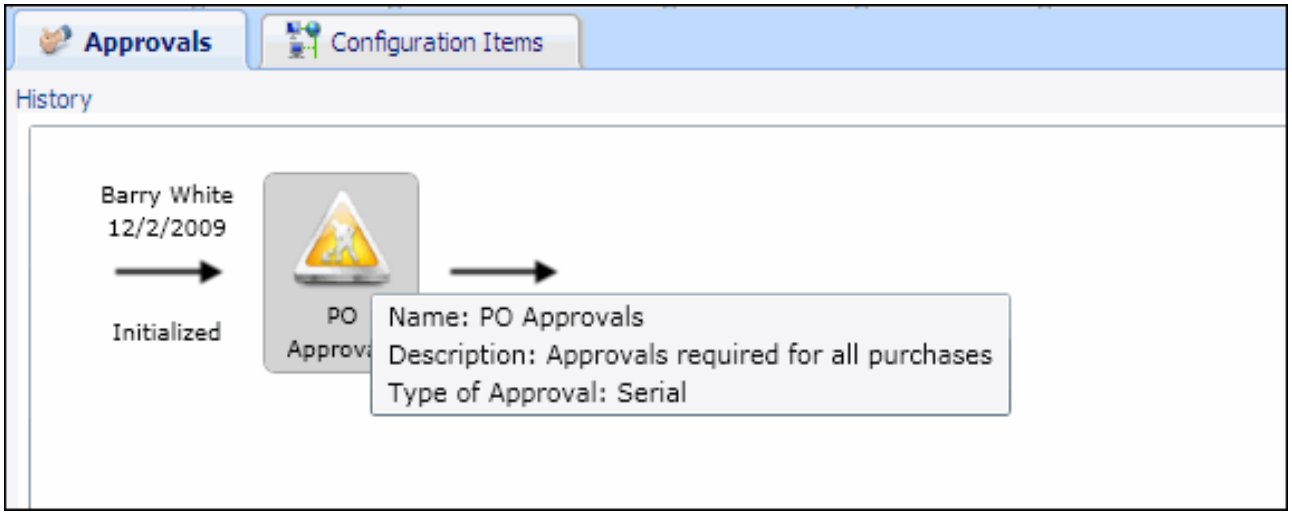
An active ad hoc approval cycle for an incident will not be cancelled when the effective SLA changes; any approvals that are defined by the new effective SLA will initiate after the ad hoc cycle is approved.

The Change Approvers checkbox will display if permissions are configured; select it to display the following dialog for adding or removing the approvers configured for the selected cycle.

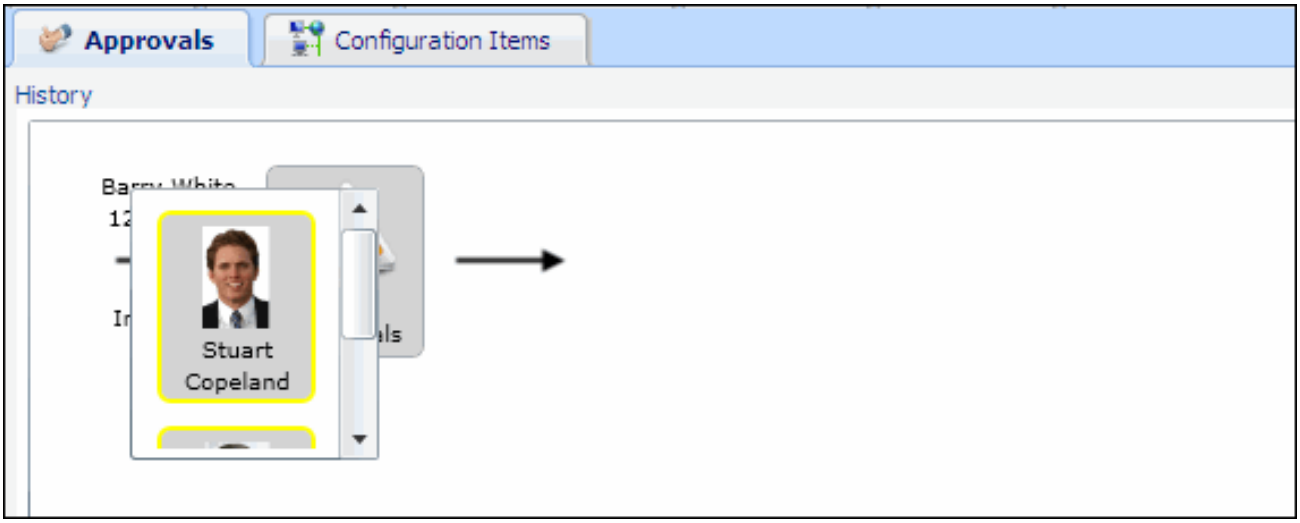


Viewing Approval History

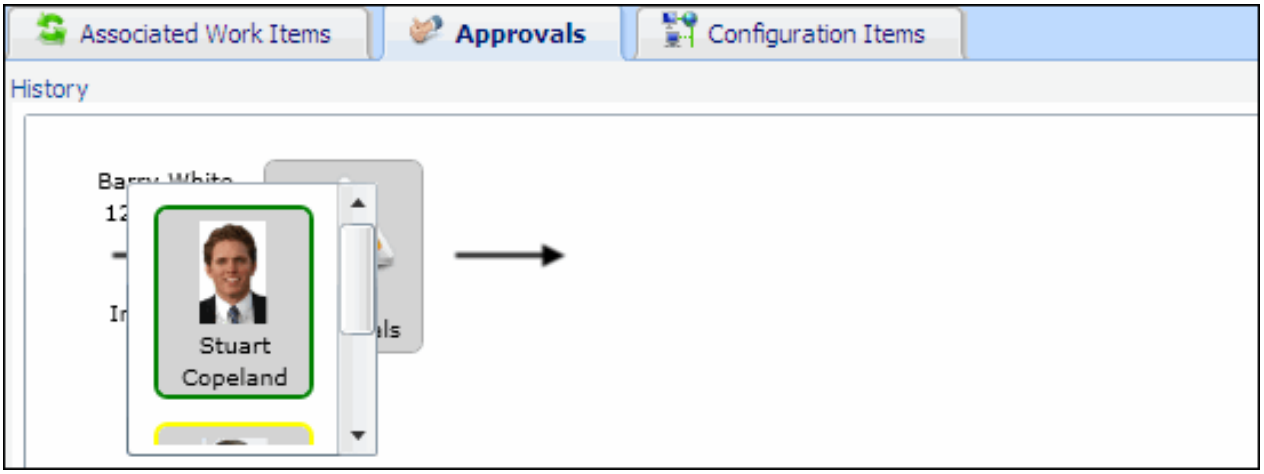
Use the Approvals tab to view a graphic display of the approvers and status of each approval in the approval process. (Note: if using a browser other than Microsoft Internet Explorer, a link appears instead of an Approvals tab for viewing approvals.) Mouse over the icon to display details about the process.



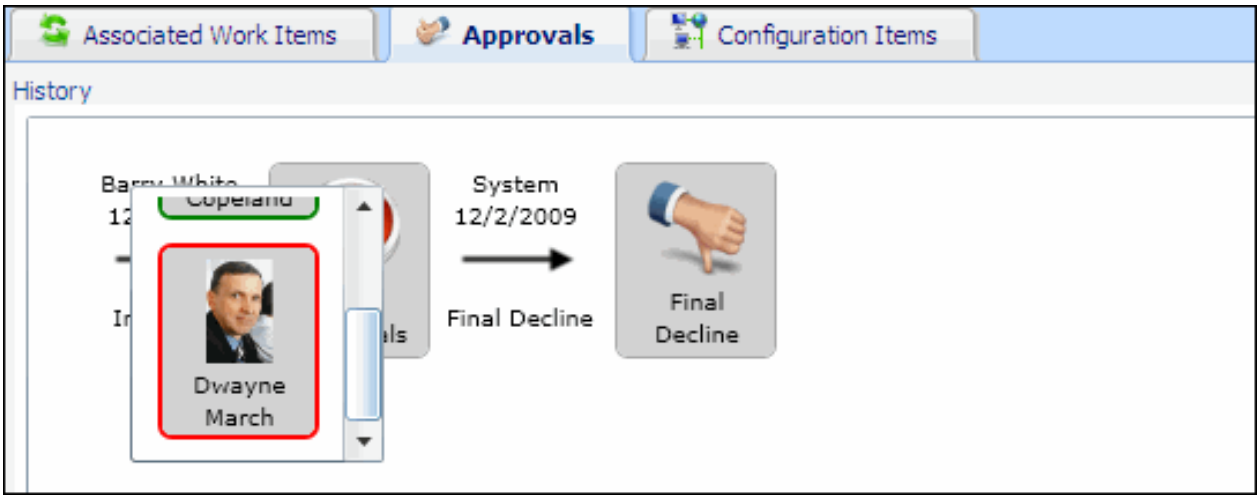
Pictures are associated with support representatives in the Support Representative Profile screen and with customers in the Customer Profile screen; if a support representative is involved in an approval cycle, the associated picture will appear when you click an icon as shown below. When an approval process is initiated, the picture and icon will appear as shown in the example below. The picture will be outlined in yellow if the approver is next in the approval process.



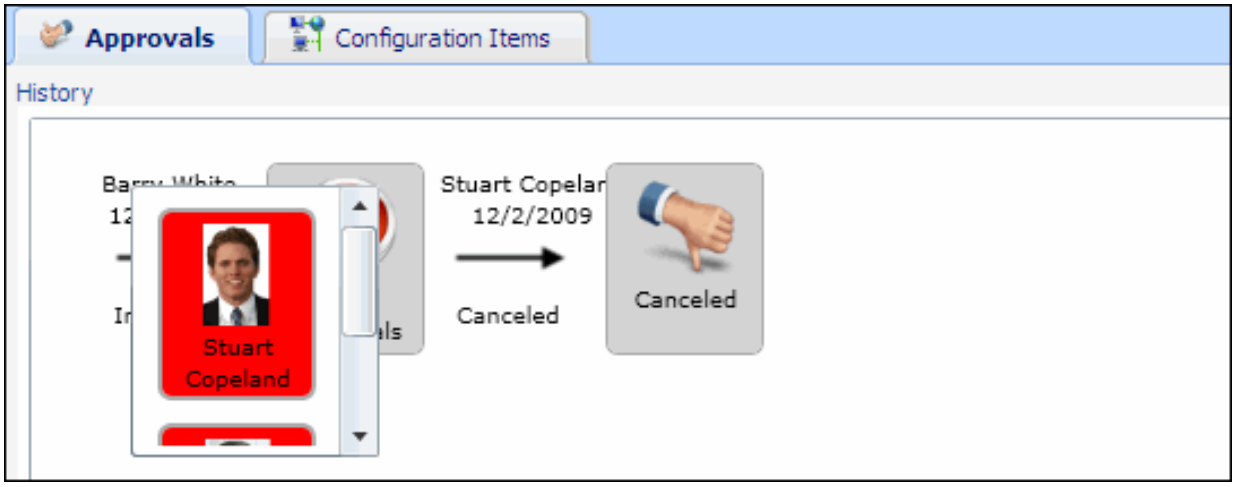
The picture will be outlined in green if the approver specifies an Approve verdict.



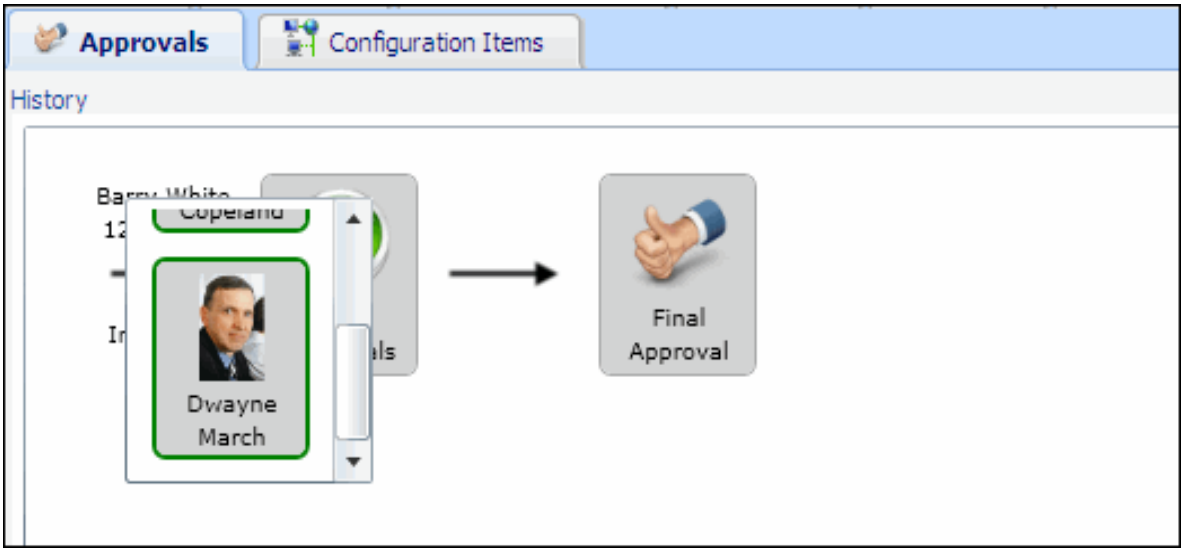
If an approver specifies a Decline verdict, the icons and pictures will appear as shown in the example below.



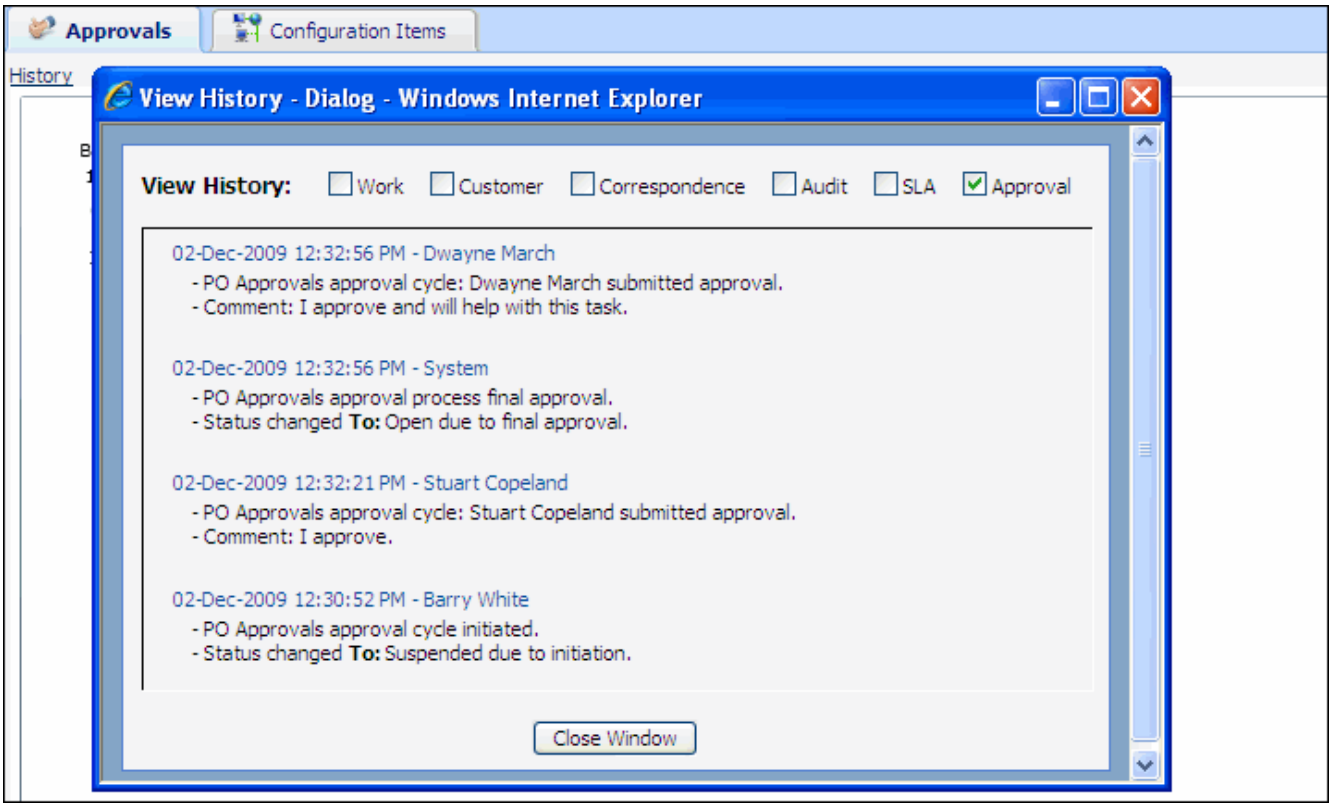
If an approver cancels the approval process, the icons and pictures will appear as shown in the example below.



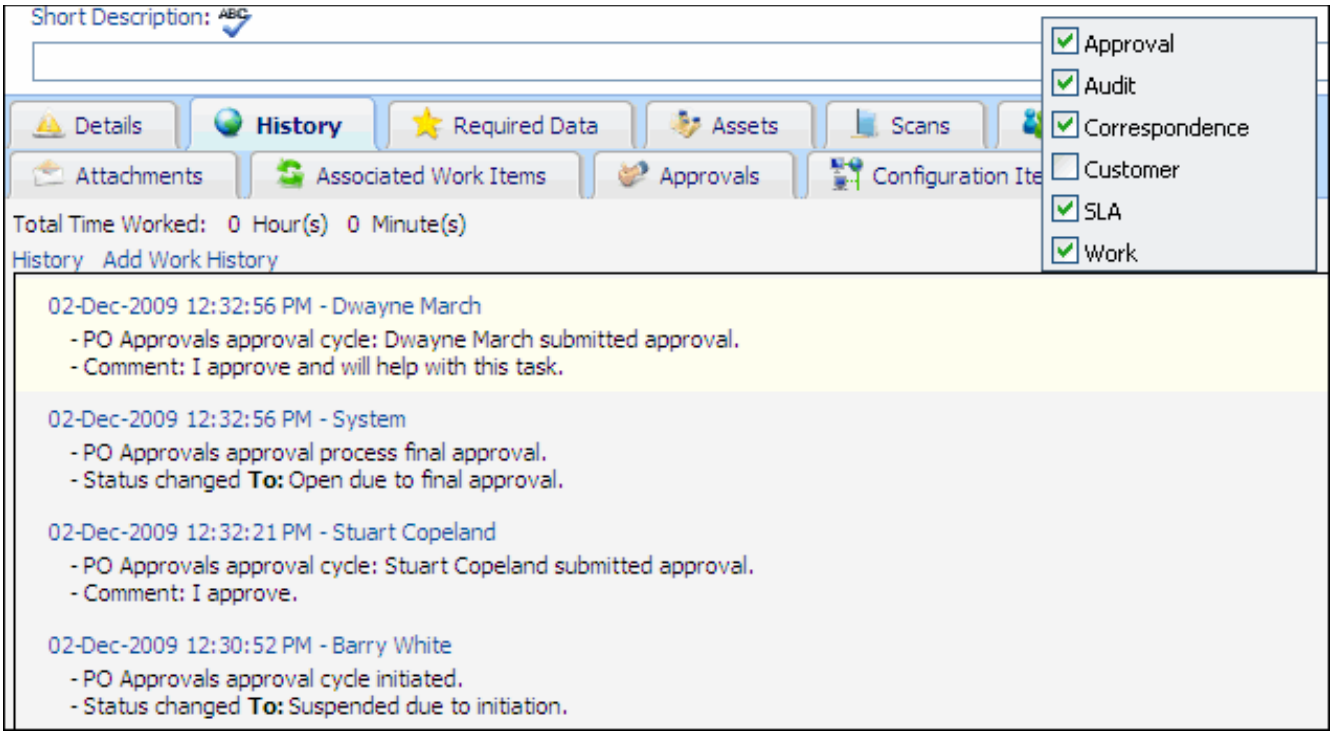
If the process results in an approval, the icons and pictures will appear as shown in the example below.



Click the History link on the Approvals tab to display all comments and approval actions.



You can also use the Approvals checkbox on the History tab to view approval actions.



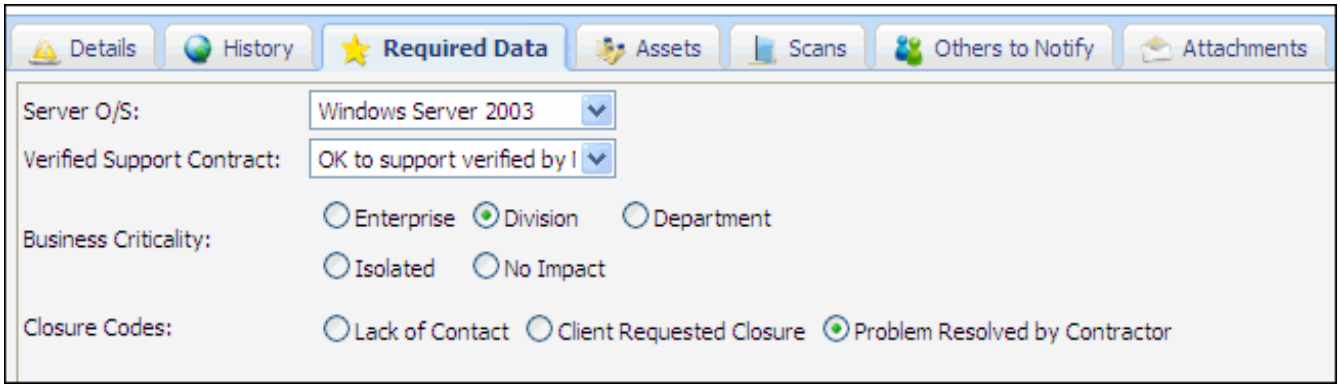
Performing Miscellaneous Incident Entry Tasks

Completing Custom Fields

The fields on the configurable tab are used to enter information specific to your company. The name of the tab is specified during configuration. Custom fields can be configured to:

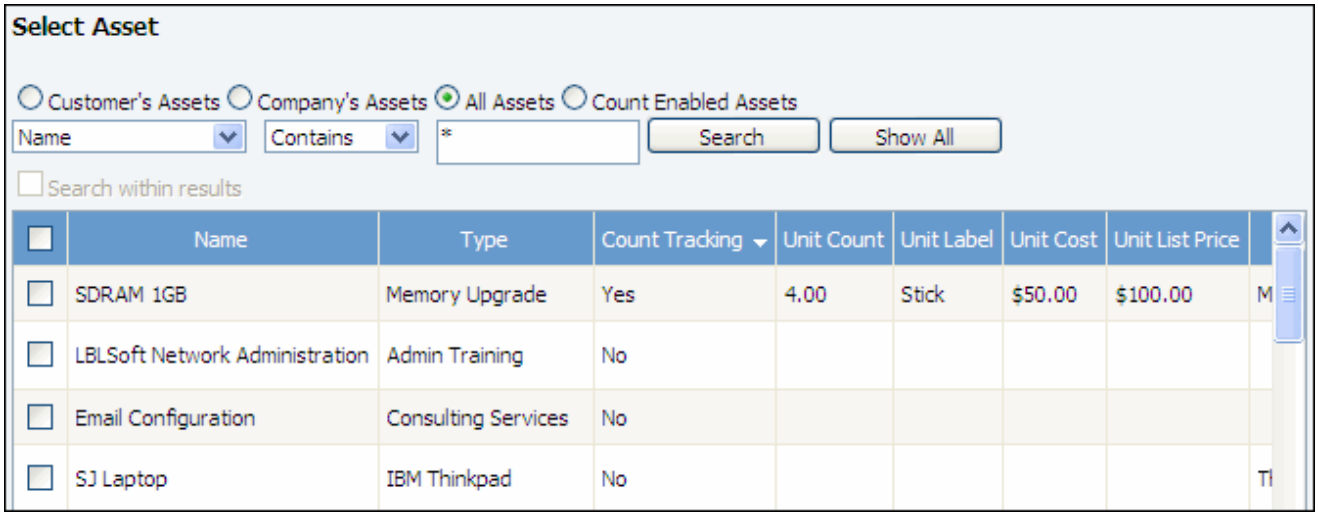
- Always appear on this tab
- Appear when a certain category is selected

You may be required to enter information in these fields. If an incident is recategorized, data saved in custom fields is retained and the custom fields associated with the newly-selected category set are added.

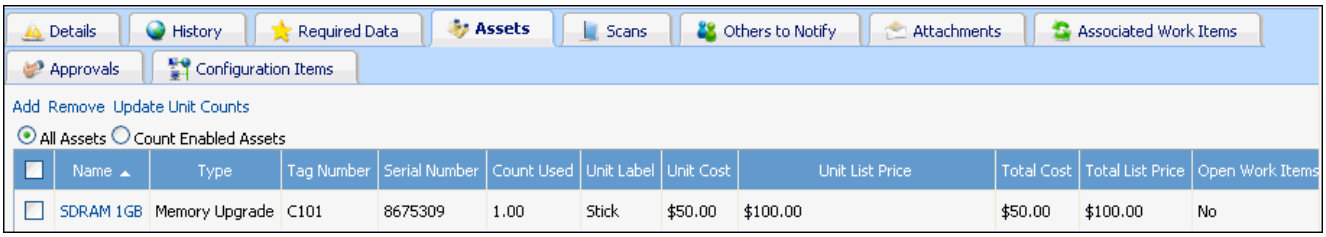


Associating Assets

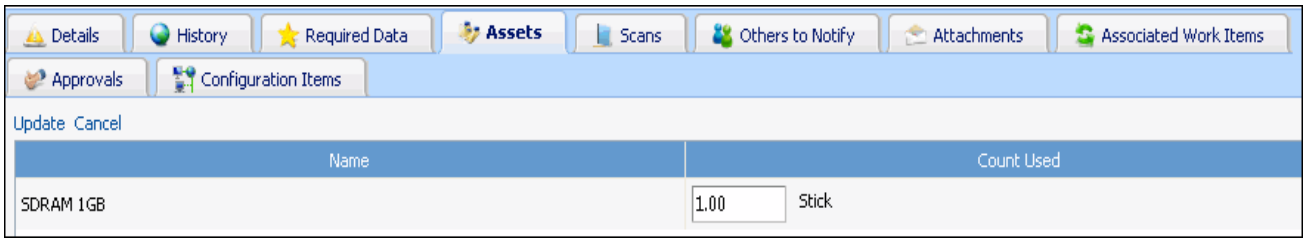
If asset functionality is enabled during configuration and the Assets tab is configured to appear in the Incident screen, you can associate asset records with an incident. Click the Add Asset icon, click the Add link on the Asset tab, or select Incident | Select Asset to display the Select Asset dialog. You can display the customer's or company's assets, all assets, or assets with an asset type that has count tracking enabled.



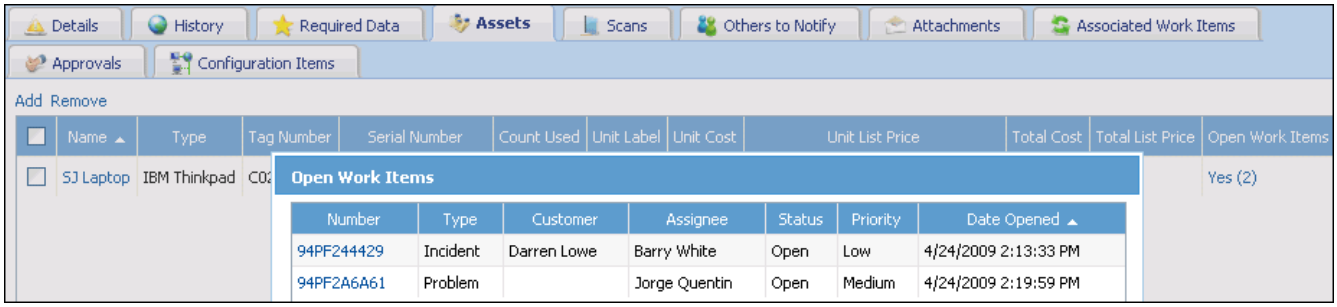
Asset fields will appear if one asset is selected; a list will appear if more than one asset is selected.



When count tracking is enabled for asset types, the Unit Count, Unit Label, Unit Cost, and Unit List Price fields will appear in the Asset screen if the type is selected. When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can click the Update Unit Counts link, enter the number of units used, and decrement the unit count. A notification can be configured to be sent when a specified count is reached.



If the asset has other open incidents, problems, or changes associated with it, “Yes” will appear along with the number of open work items. Click the link to display a list of those items.



To view more asset information, you can select one of the following after saving the incident:

- Find | Incidents | All Incidents | For Asset to display a list of all incidents associated with the asset.
- Find | Assets | For Customer to display a list of all assets that have the customer listed as the owner.
- Find | Assets | View Asset to display the entire asset record.

To create a new asset record, select New | Asset.

Refer to the Working With Assets chapter for more information on completing Asset fields.

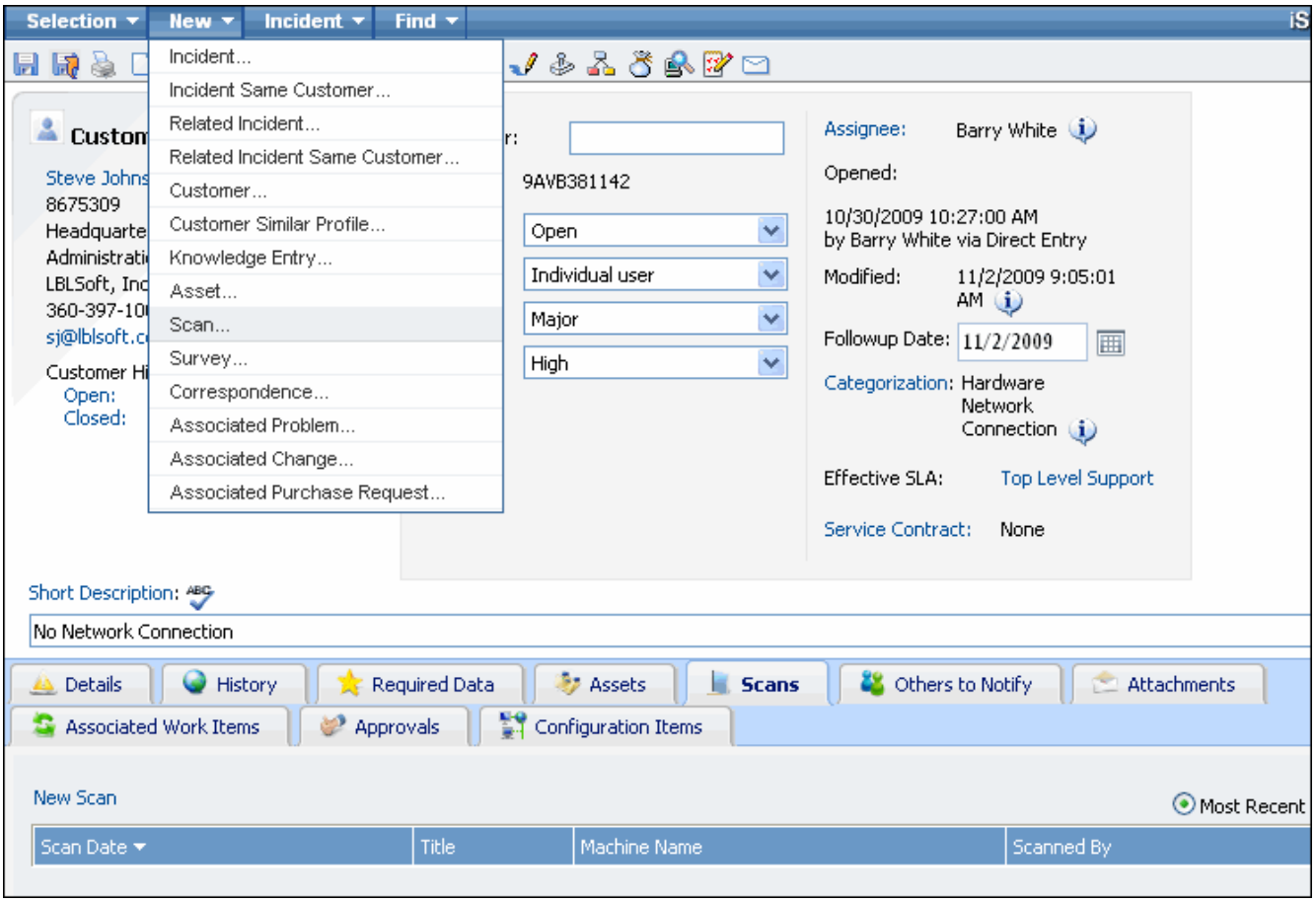
Performing Asset Scans

If configured, the Scans tab will appear in the Incident screen. Asset scans collect hardware, software, and service details automatically on a computer (Windows 98 and above or any other WMI-compliant machine; WMI must be installed and active) and on non-Windows devices on your local subnet. There are two types of scans in iSupport:

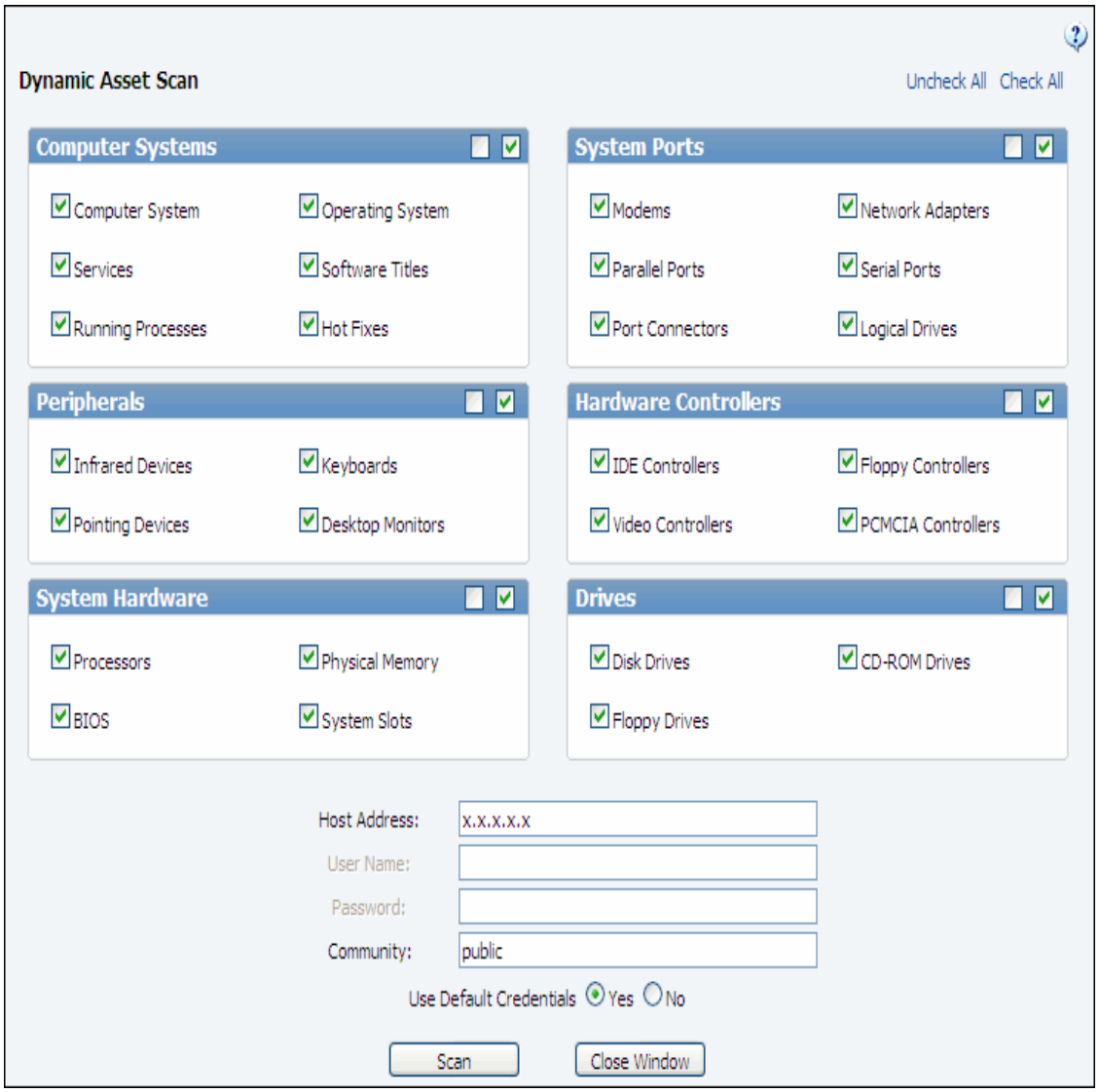
- You can perform a **dynamic asset scan** from the Incident or Asset screen or Desktop.
- **Inventory asset scans** can be scheduled and run automatically according to an Inventory Scan Definition, which defines the hosts (remote machines) to be scanned during a specified start time and duration. Inventory scans include a more comprehensive set of data than dynamic scans.

To perform the scan, you will need to enter IP address or NetBIOS name of the machine to be scanned. The login used to run the scan must be in the Administrators group on the machine to be scanned. If you do not have this login, it can be set during configuration and accessed automatically by iSupport.

To initiate a scan in the Incident screen, click the Scan icon, select New | Scan or click the New Scan link on the Scans tab.



The Dynamic Asset Scan dialog appears:



In the Dynamic Asset Scan dialog, select the types of data to include in the scan. To select all checkboxes in a section, use the icon; to clear the checkboxes in a section, use the icon. Use the Uncheck All and Check All links for all checkboxes.

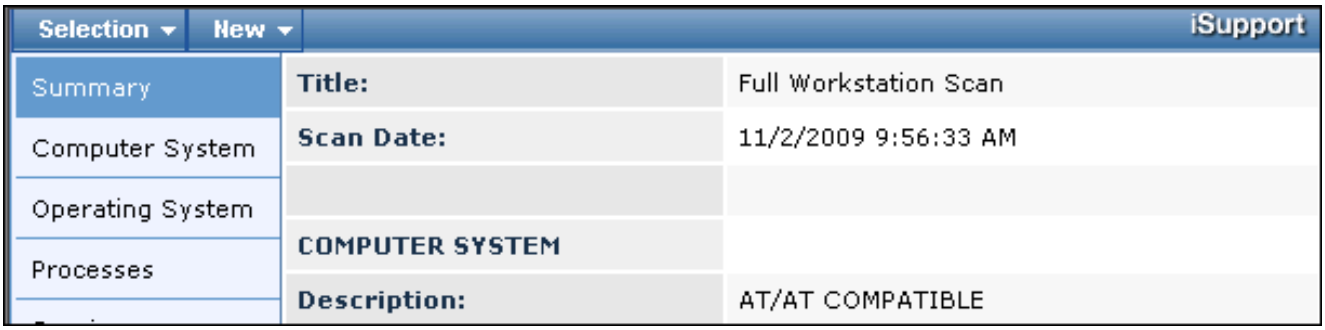
In the Host Address field, enter the identifier of the system to be scanned (IP address, machine name to scan in the current domain, or domain\machine name).

In the User Name and Password fields, enter the user name and password for accessing the machine to be scanned; this login can be set up during configuration and accessed automatically by iSupport.

If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device) in the Community field. Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".

When finished, click the Scan button.

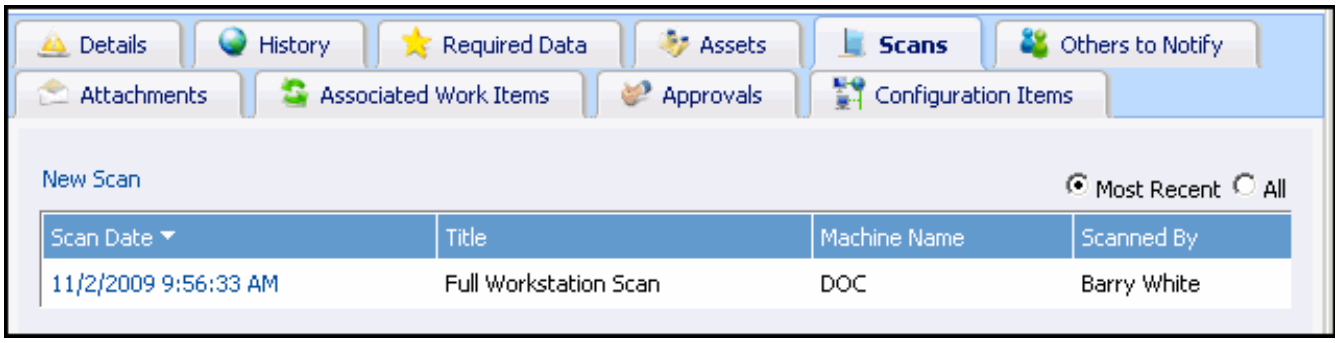
After the scan has finished, the Scan Results dialog appears as shown in the example below. Use the links on the left to quickly move to a certain portion of the scan. Choose Save on the Selection menu to save the scan and enter a title.



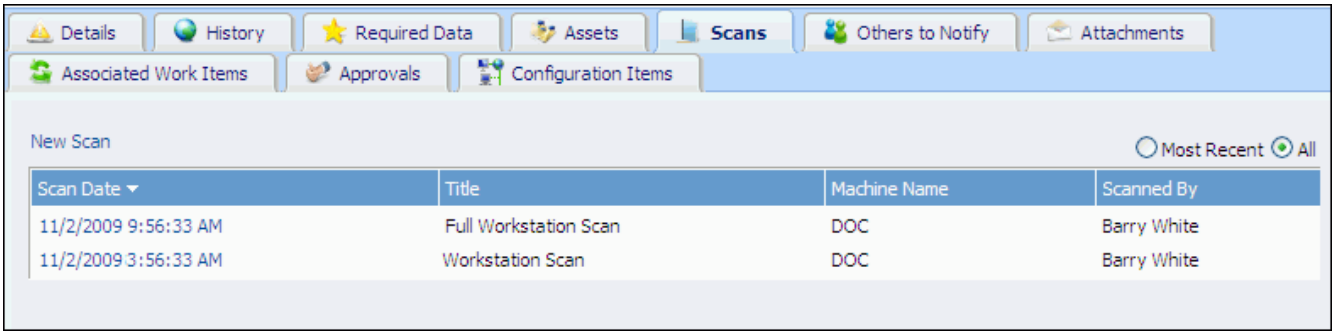
Choose Attach to Incident on the Selection menu to attach the scan to the current incident. If an asset with a scannable asset type (set up during configuration) is associated with the current incident, you can choose Attach to Asset and Attach to Incident and Asset on the scan's Selection menu to attach the scan to the asset record and the current incident. You can detach scans later if needed.

If you have sufficient permissions, you can generate and save a side-by-side comparison of two scans (dynamic or inventory). From an existing scan, choose New | Scan Comparison, and select the second scan. You can save and title the scan comparison.

If the Scans tab is enabled to appear, the Most Recent radio button on the Scans tab displays the most recent dynamic scan attached to the incident, and most recent inventory and dynamic scan attached to any scannable asset selected on the Assets tab (if the Assets tab is enabled to appear).



The All radio button displays all dynamic scans attached to the incident, and all inventory and dynamic scans attached to any scannable asset(s) selected on the Assets tab.

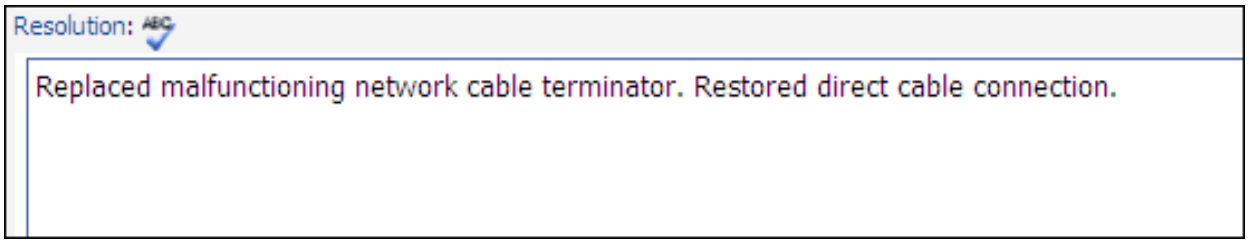


To detach a scan, click on the Scan Date link to open it and choose Detach from the scan's Selection menu.

Resolving Incidents

Entering the Issue Resolution

In the Resolution field on the Issue tab, enter a detailed description of the resolution, including the steps or processes involved. You can click the icon to spell-check your entry.



If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Resolution field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

See the next sections for information on including content from knowledge entries and RightAnswers in the Resolution field.

Searching RightAnswers

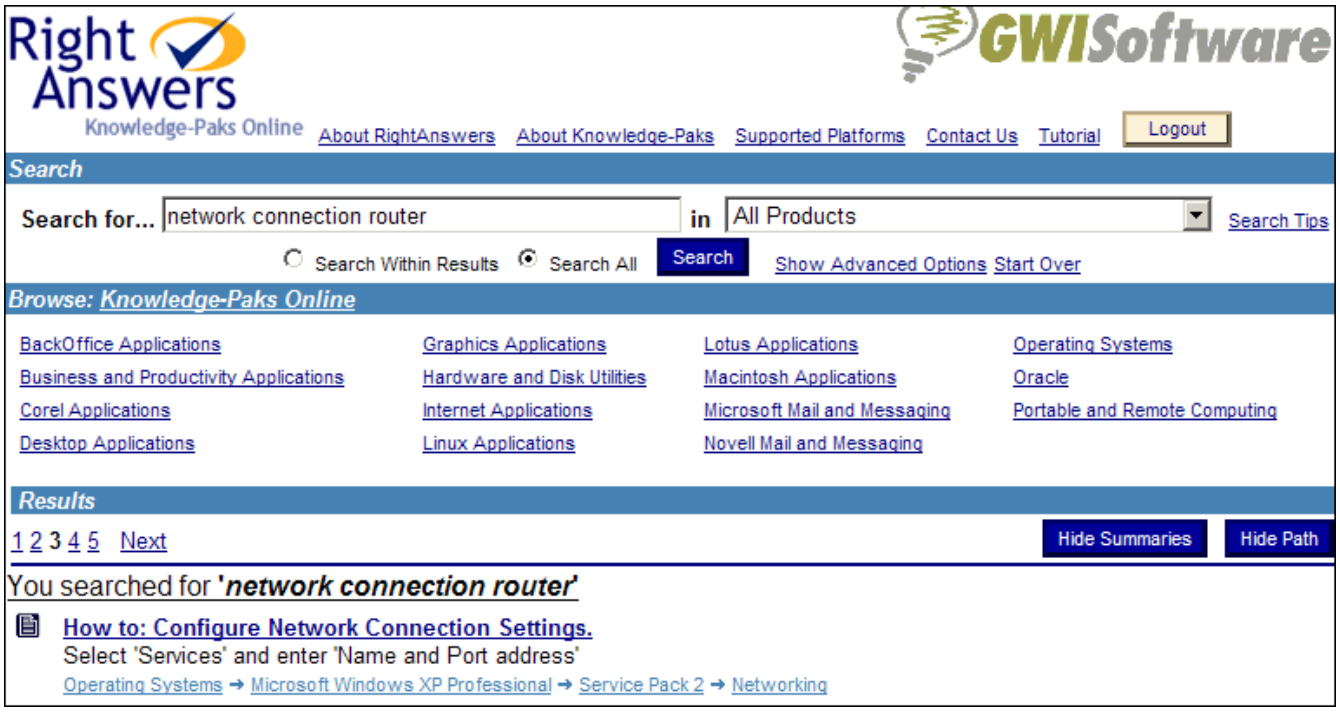
If iSupport's Right Answers integration is enabled and set up in the Configuration module, you can access subscription-based knowledge content for common PC hardware, software, and network

issues. Depending upon options set in the Configuration database, the search may be based on the incident's issue description and/or categorization.

To access RightAnswers:

1 Select Find | Search RightAnswers.

2 A screen displays listing all of the knowledge entries that match the search; select the applicable solution.



3 In the screen detailing the entry, click the Yes, Copy Solution to Incident Ticket button to automatically paste in the Issue Resolution field.

Right Answers
Knowledge-Paks Online
GWISoftware

About RightAnswers | About Knowledge-Paks | Supported Platforms | Contact Us | Tutorial | Logout

Search

Search for... network connection router in All Products Search Tips

Search Within Results Search All Search Show Advanced Options Start Over

Browse: Knowledge-Paks Online

BackOffice Applications	Graphics Applications	Lotus Applications	Operating Systems
Business and Productivity Applications	Hardware and Disk Utilities	Macintosh Applications	Oracle
Corel Applications	Internet Applications	Microsoft Mail and Messaging	Portable and Remote Computing
Desktop Applications	Linux Applications	Novell Mail and Messaging	

Solution

Knowledge-Paks Online → Operating Systems → Microsoft Windows XP Professional → Service Pack 2 → Networking

How to: Configure Network Connection Settings.

Solution: Click 'Advanced' tab on 'Windows Firewall' dialog box. Under 'Network Connection Settings' group box, click 'Settings'. on the 'Services' tab, select the services running on your network that internet users can access. Enter Name or Port address of the computer hosting this service on the network.

Details: Different services running on network can also be made available to Internet users by configuring the network connection in Windows Firewall.

1) Click 'Start' and click 'Control Panel'.
2) Double-click 'Windows Firewall'. (The 'Windows Firewall'dialog box appears.)
'Windows Firewall' dialog box
3) Click 'Advanced' tab. (The 'Windows Firewall'dialog box appears.)
'Windows Firewall' dialog box
4) Under 'Network Connection Settings' group box, click 'Settings'.(The 'Advanced Setting' dialog box appears.)
'Advanced Settings' dialog box
5) On the 'Services' tab, select the services running on your network that internet users can access. (The 'Service Settings' dialog box appears.)
'Service Settings' dialog box
7) Enter Port address of the computer hosting this service on the network.
8) Click 'OK'.
9) Close 'Advance Settings' dialog box.

Symptoms: How to: Configure Network Connection Settings in WinXP SP2.

Did this solve the problem?

Yes. Copy Solution to Incident Ticket | No | No, Request New Solution Be Added | Printer Friendly Version

Solution ID: 040452859188167 **Last Modified Date:** 1998/06/23 00:00:00

The solution appears in the Issue Resolution field. A link to the RightAnswers entry will also be included.

Resolution:

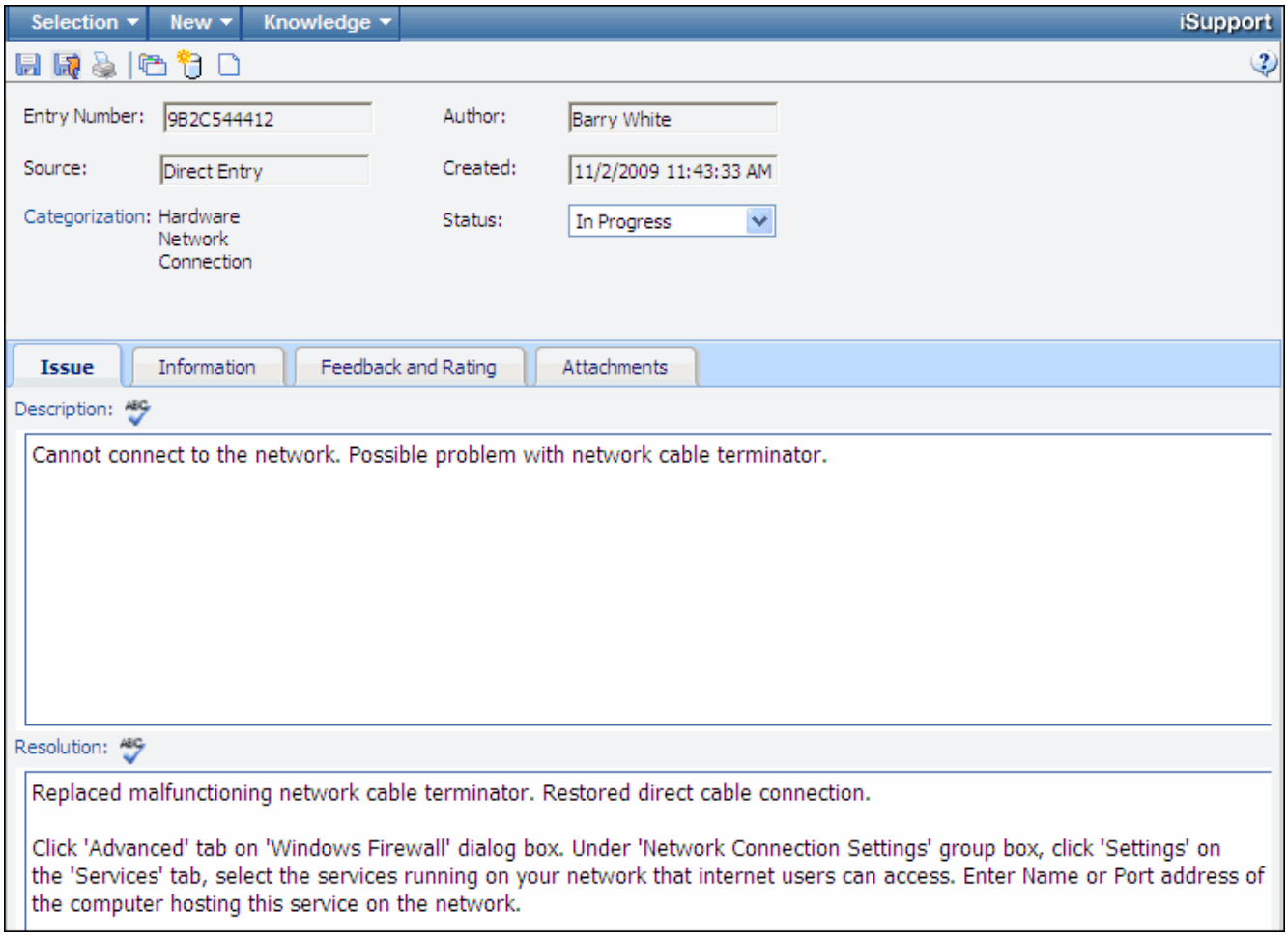
Click "Advanced' tab on 'Windows Firewall' dialog box. Under 'Network Connection Settings' group box, click 'Settings' on the 'Services' tab, select the services running on your network that internet users can access. Enter Name or Port address of the computer hosting this service on the network.

If text exists in the Resolution field, it will be overwritten when the solution is copied from RightAnswers.

Creating New Knowledge Entries

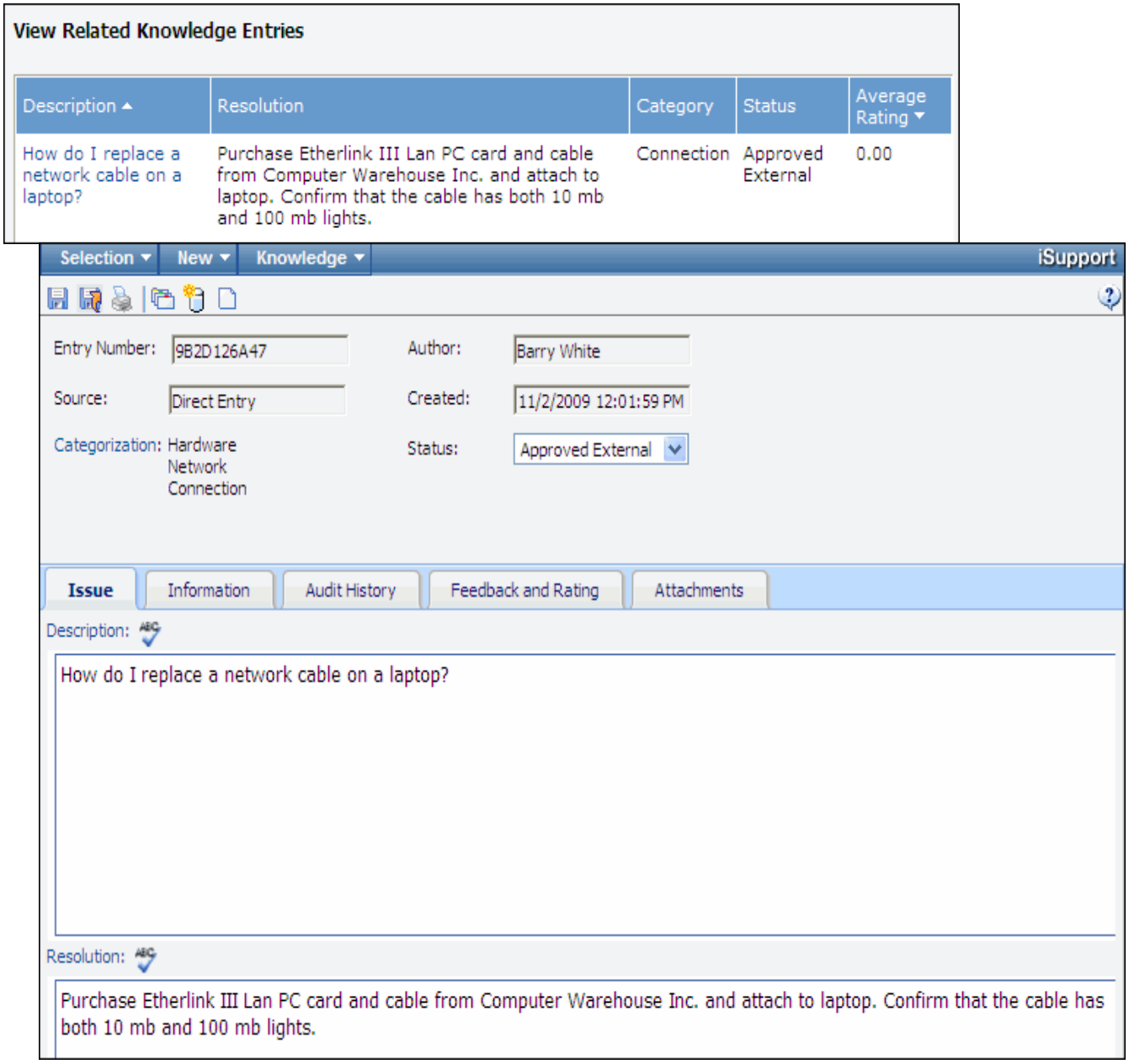
Knowledge entries contain fields for the category set, issue description and resolution, cause, steps, error messages, and URLs, and attachments.

To create a new knowledge entry with the categorization and issue description and resolution from the incident, select New | Knowledge Entry in the Incident screen.

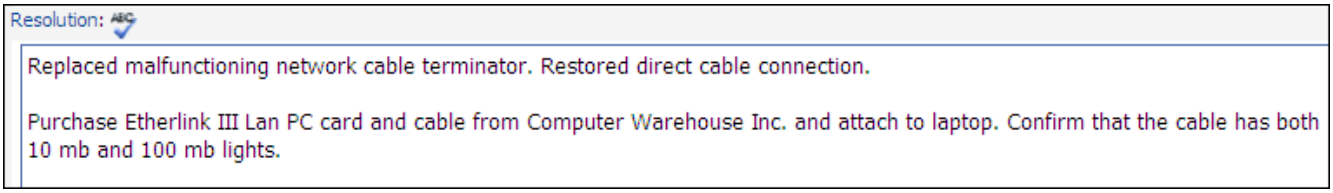


Searching for Knowledge Entries

To display knowledge entries matching the selected category set, click the icon or select Find | Knowledge for Categorization in the Incident screen. If you find a knowledge entry that solves the issue, you can select Knowledge | Capture Solution to copy and paste the issue description and resolution into the corresponding fields on the incident.

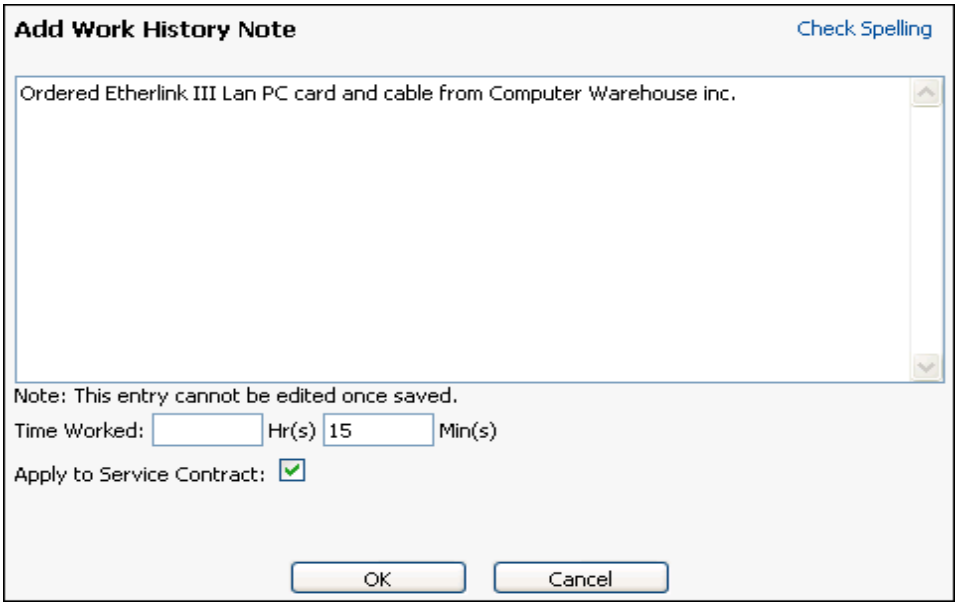


The issue resolution from the knowledge entry will be appended to the bottom of the text in the Issue Resolution field on the incident.



Entering Work History

To enter information on any activities related to resolving the incident, click the icon or the Add Work History link on the History tab. For example, you can document customer contacts or conversations with customers or support staff. This field is useful when routing an incident to another support representative because it allows them to see the work that has been performed. If enabled during configuration, call scripts are included in this field. If configured, you may be required to make an entry in the Time Worked field after entering work history.

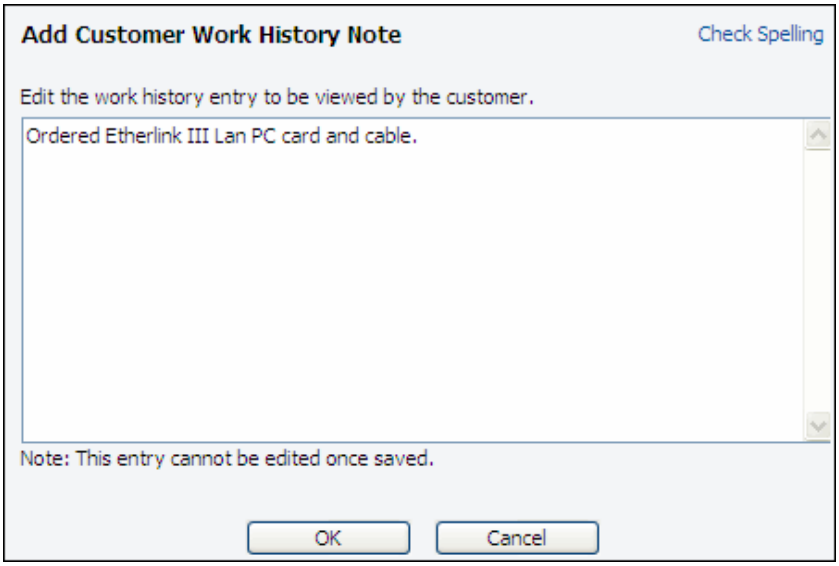


If an hours-based service contract is in effect for the incident, select the Apply to Service Contract checkbox to apply the amount entered in the Time Worked field to the contract.

Using the Customer Work History Field

If set up during configuration, the Customer Work History can be can be set up to include editable contents of the Work History field. After clicking OK in the Work History dialog, the Edit Customer Work History Note dialog will appear. Depending on how it is configured, it may be blank for you to enter comments or it may include the contents of the Work History field. You may or may not

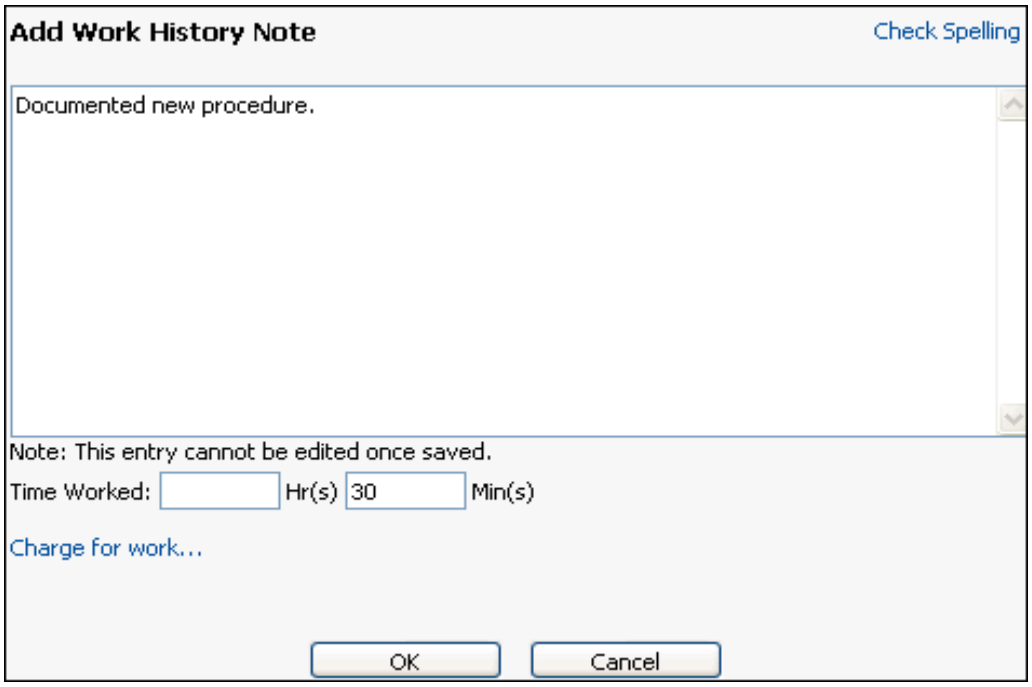
be able to edit the text. This information will be labeled “Work History” on the End User Desktop incident fields.



If configured, Customer Work History notes will be sent to the customer in an email.

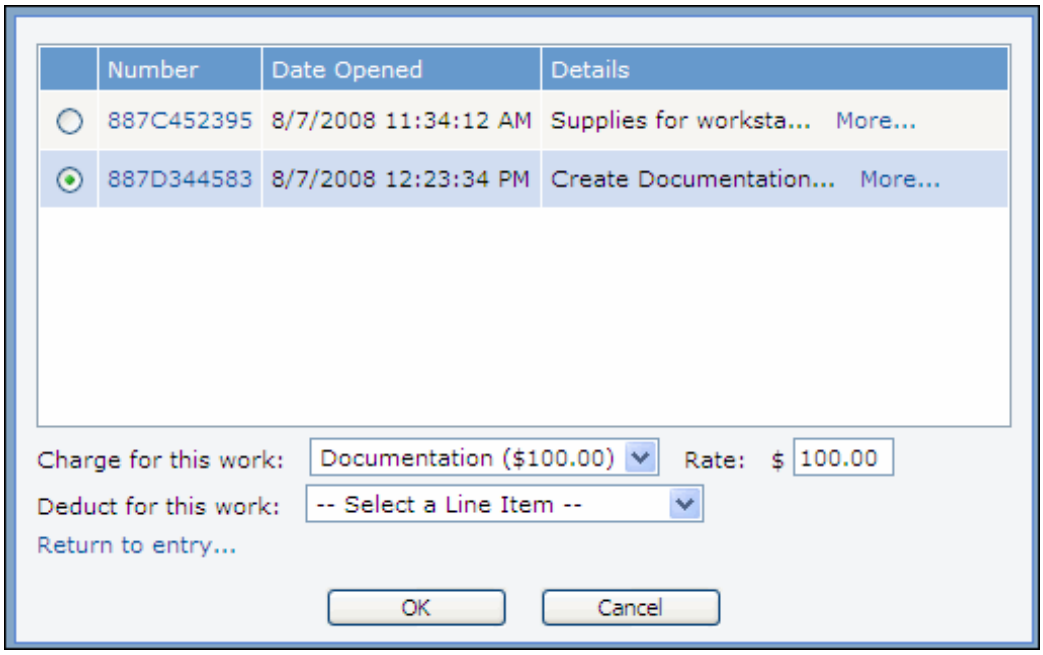
Charging Time Worked Against Purchase Orders

If Purchasing functionality is enabled, when entering time worked in the Incident screen, you can add a charge (an amount of time worked multiplied by a rate) as a separate line item or use a charge to decrement an existing line item on an associated purchase order. After entering the time worked, click the Charge for Work link.

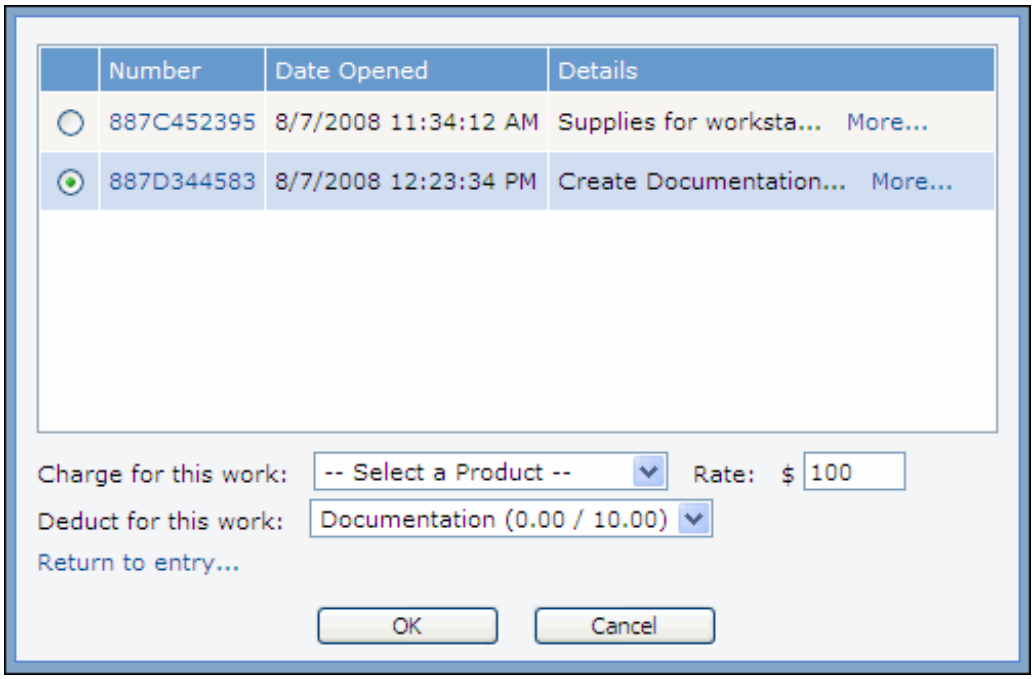


The purchase orders associated with the incident appear; select the purchase order for which the charge should be applied. Then:

- To **add a separate line item charge** to the purchase order (increasing the total amount), choose the product from the selected purchase order in the Charge For This Work field. In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog. Click OK

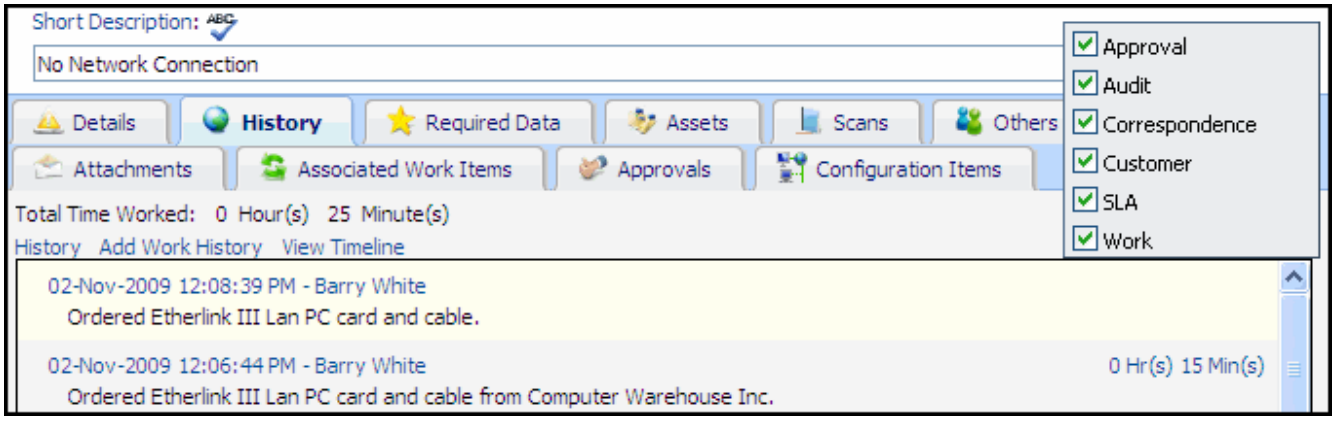


- To **use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order and click OK.

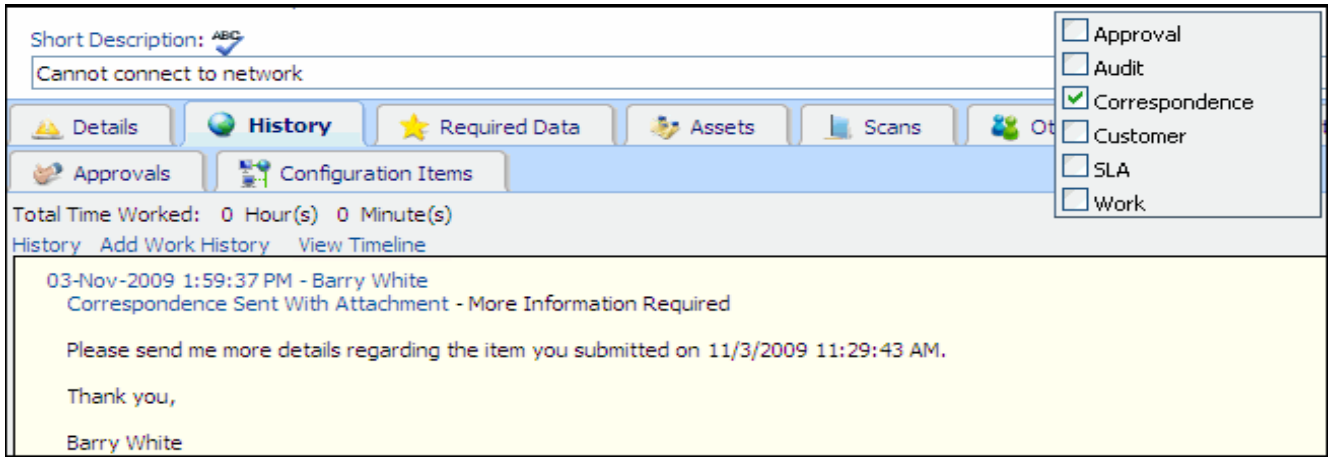


Viewing Work History, Customer Work History, and Audit History

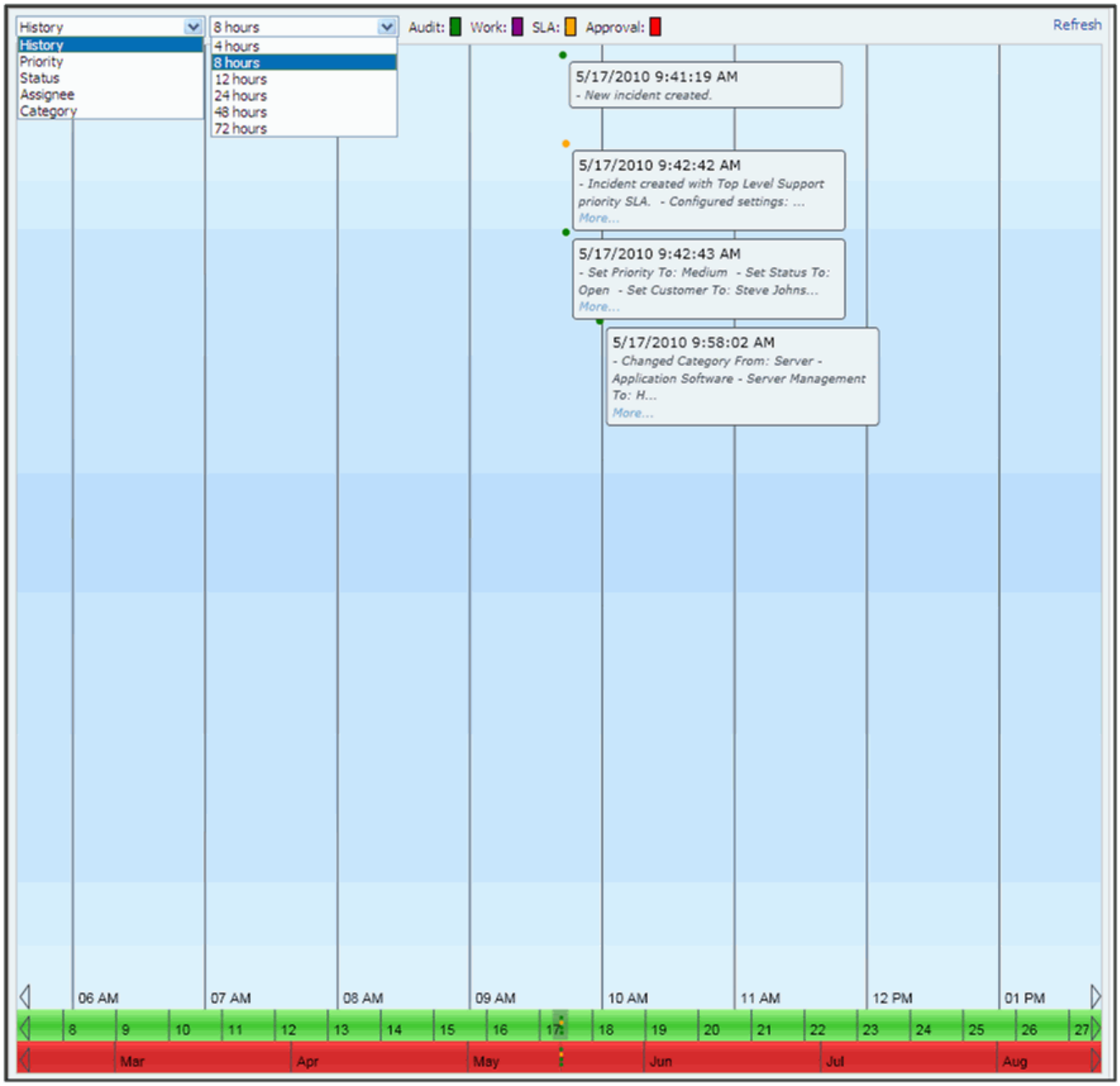
Use the History tab to view notations on all incident actions.



- To view Work History entries, select the Work checkbox.
- To view customer work history entries, select the Customer checkbox.
- To view a notation of every action performed on the incident including the date, time, and author stamp, select the Audit checkbox.
- To view a notation of every approval action, select the Approval History checkbox.
- The Correspondence checkbox displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen.

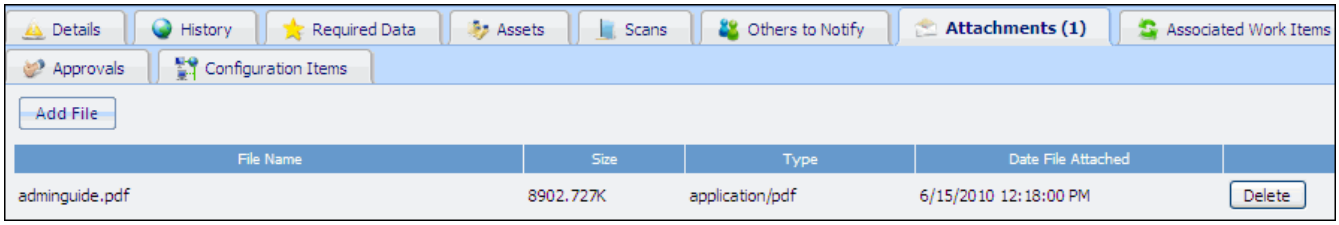


Click the View Timeline link on the History tab to display historical incident events on a timeline. Use the dropdown fields to select the types of entries to display and the timeline increments. You can use your mouse to scroll the green hour bar and red month bar at the bottom of the screen.



Attaching Files

To attach a file to the incident, click on the Add File button on the Attachments tab and select the file. The file name appears in the Attachment field.



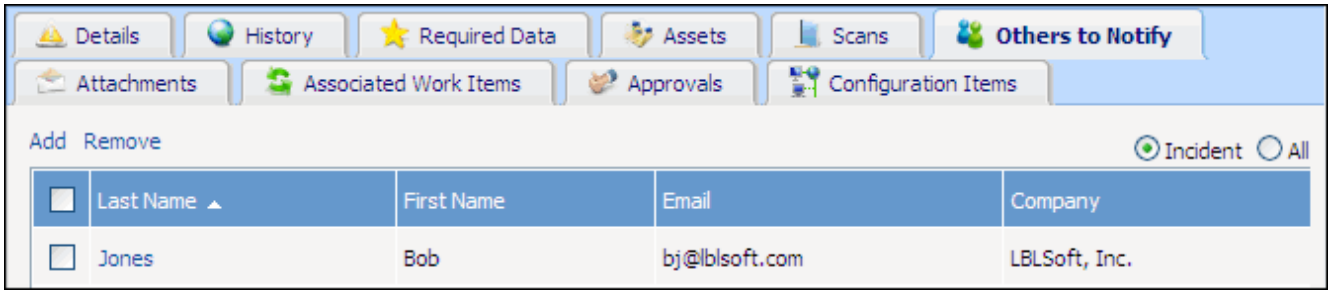
If you are working on an incident created from an email submission, a link to the correspondence is included in the History field and attachments are placed on the Attachments tab of the correspondence. If there is an alternate version of the body of the email (created by the email application), if configured it will be saved as a document and placed on the Attachments tab of the correspondence.

Performing Post-Entry Incident Tasks

Specifying Others to Notify

If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and support representatives that are not directly involved in the incident process to be sent incident event notifications and other correspondence. For example, notifications could be configured to be sent to a salesperson whenever an incident is created for one of their accounts. An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual incident, problem, change, or configuration item.

To add a customer or support representative to the incident-specific Others to Notify list, click the Add link. Use the Remove link to delete anyone from this list.



This incident-specific list is only a subset; the comprehensive Others to Notify list for an incident also includes any Others to Notify lists for the selected customer profile, categorization, and company. You can display the comprehensive Others to Notify list (those associated with the selected customer, customer's company, and category) using the All radio button. You cannot change entries in the comprehensive Others to Notify list via the Incident screen.

Others to Notify lists are used with incidents in the following ways:

- When incident event (save, close, email-submitted incident creation, route, and Customer Work History save) notifications are set up in the Configuration module, Others to Notify lists can be included in the To field or in the CC field. The comprehensive Others to Notify list will be used.
- When you create a correspondence, you can choose to copy (CC) those in the Others to Notify list. The correspondence will be sent to the comprehensive Others to Notify list. See the next section for more information.
- When you send correspondence for selected incidents via the Desktop, you can choose to copy (CC) those in the Others to Notify list. The correspondence will be sent to the comprehensive Others to Notify list.

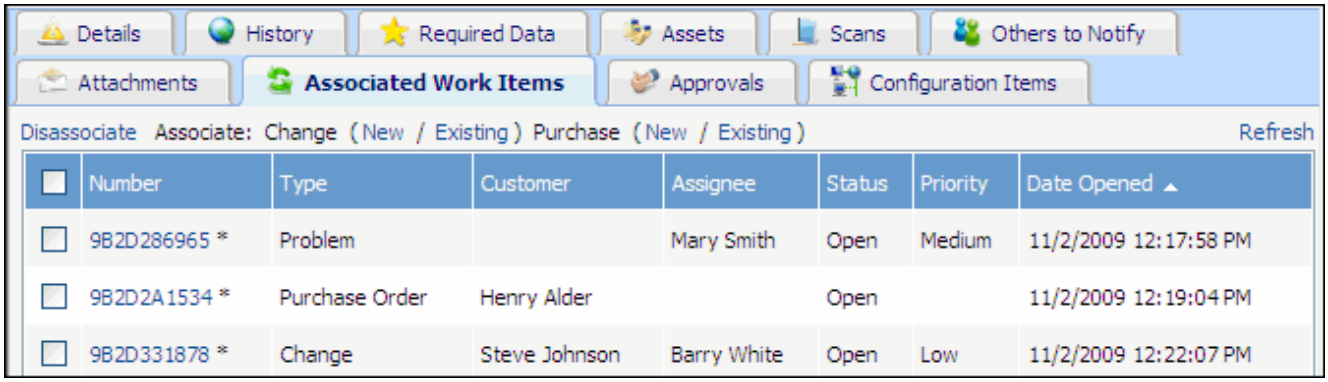
Associating Problems, Changes, and Purchase Requests/Orders

Use the links on the Associated Work Items tab or New menu to associate a new or existing Purchase Request/Order, Problem, or Change record (if enabled) with the incident.

If you create a new problem or change, the Categorization and Description will be included in the corresponding fields on the record. Only one Problem record can be associated with an incident. See "Working with Problem Records" on page 263 for information on entering Problem records; see "Working with Change Records" on page 297 for information on entering Change records.

If you create a new purchase request, the text in the Description field will be included in the Comments field on the purchase request. See "Creating Purchase Requests" on page 417 for more information.

The associated records will appear as shown below. To disassociate a record, select the record and click the Disassociate link.

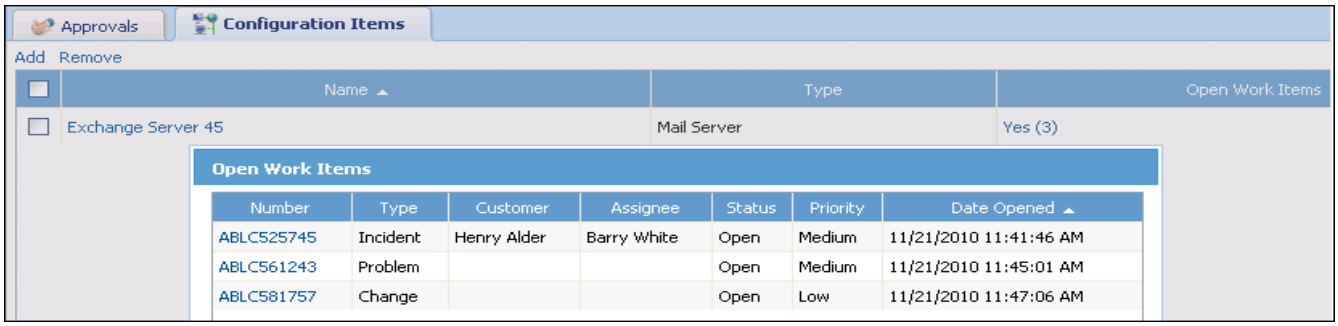


If configured, the incident will be closed when an associated change or problem is closed. The Closed status assigned to the automatically closed incident can also be specified in configuration.

Associating Configuration Items

If you have the Service Desk edition, you can use Configuration Management Database (CMDB) functionality to display, report on, and send correspondence regarding the assets, services, and other resources that are crucial to your organization's operation and the relationships between those items. If a CMDB has been configured, click the Add link on the Configuration Items tab to

associate a predefined configuration item with the incident. You can click on it to display the Configuration Item screen for viewing the item's relationships with other items, and include information on associated configuration items in views, reports, and correspondence. See "Working with Configuration Items" on page 403 for more information. If the configuration item has other open incidents, problems, or changes associated with it, "Yes" will appear along with the number of open work items. Click the link to display a list of those items.

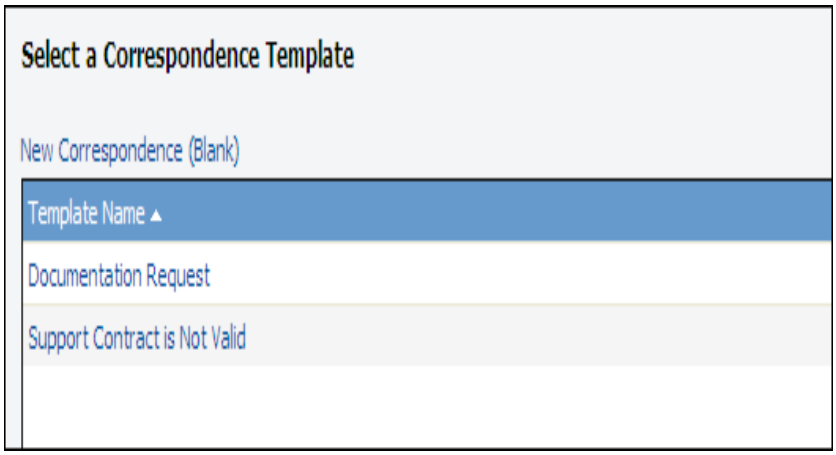


Sending an Email From an Incident

To send an email from the Incident screen, you can:

- Select New | Correspondence.
- Click the Email link in the customer information section of the incident.
- Click the New Correspondence icon.
- Click the View Rep Details icon (next to the Assignee field) and then click the Email link to send an email to the current assignee.

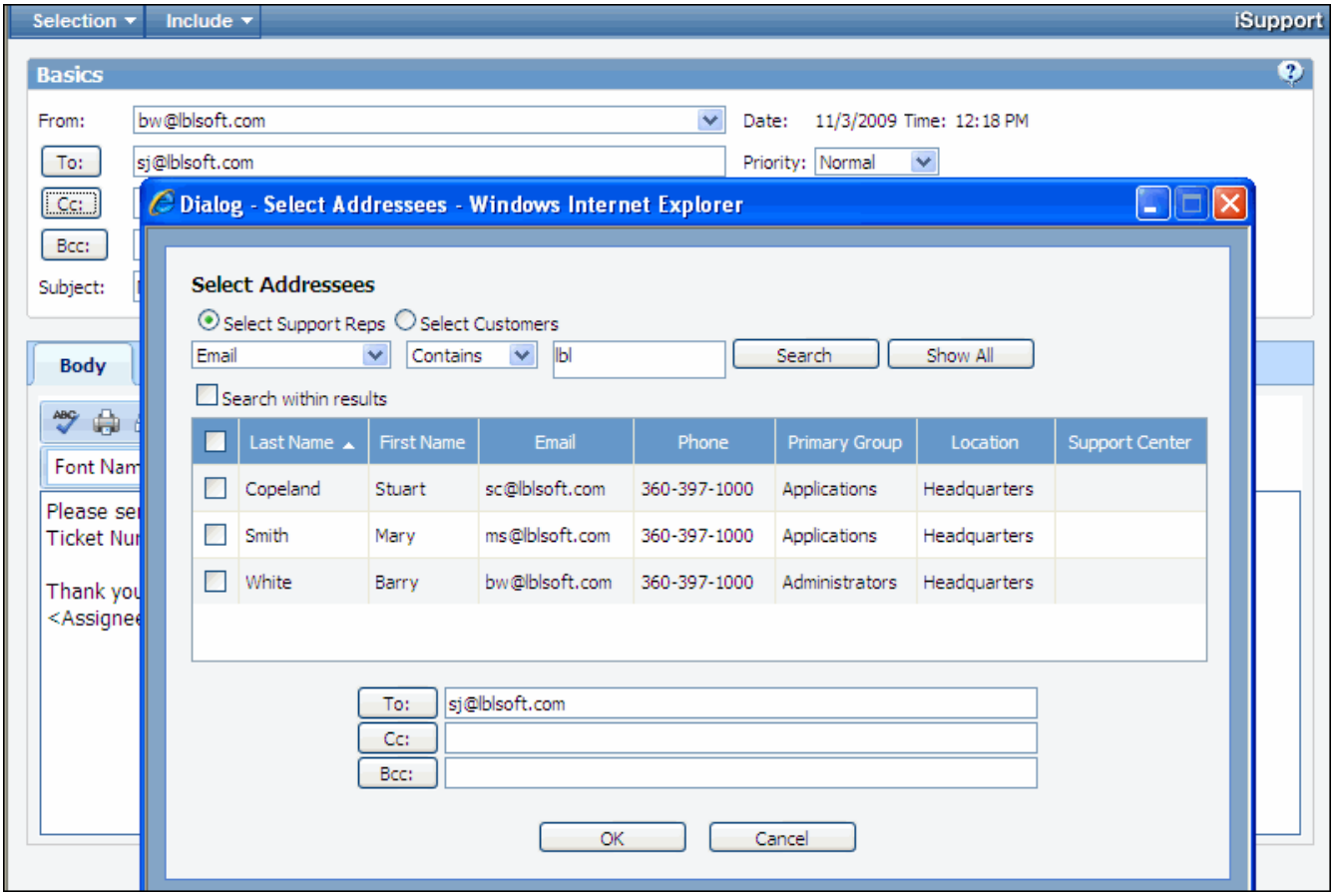
You can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).



Correspondence templates may be configured to contain only read-only (greyed out) fields.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included. By default, the To field contains the email address set up for the customer in his/her Customer Profile record. If creating a new correspondence document, the CC, BCC, Subject, and Attachments fields are blank.

You can click the To, Cc, and Bcc buttons in the Correspondence screen to display a dialog for selecting addressees. Use care with the Select All ☐ checkbox, as it will include all names on the current page (up to 100 addressees).

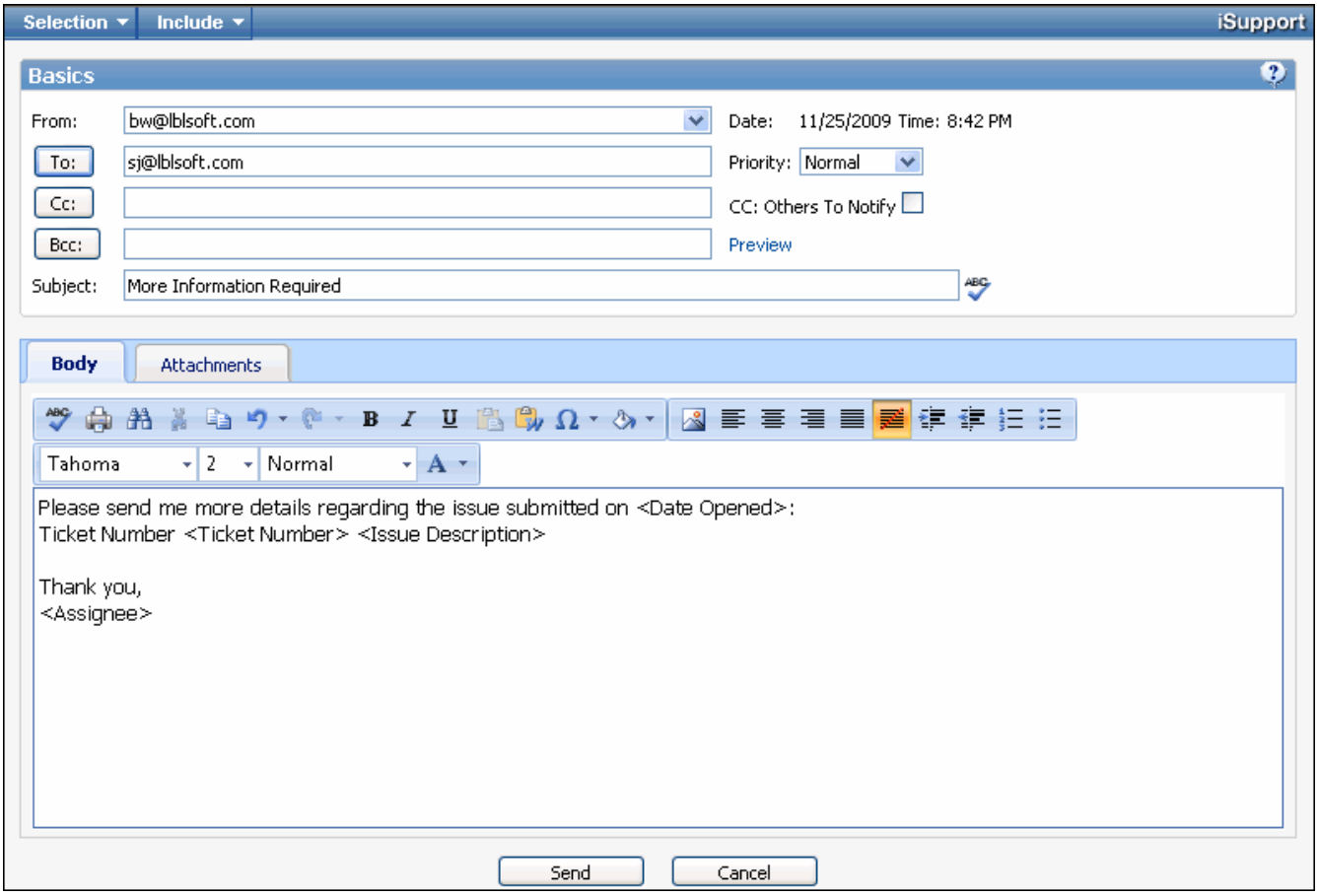


The Others to Notify field in the Correspondence screen enables you to send the correspondence to those designated in the Others to Notify field in the customer's Customer Profile record, the customer's Company record, and those designated on the Others to Notify tab in the current incident.

If using a template, some or all of the fields may be populated. Fields (for example, <First Name>) may be included as set up during configuration. These fields will be replaced with corresponding data from the incident when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

In either a blank correspondence or correspondence created from an editable template, the Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).



The text editor toolbar will appear when you place your cursor in the Body field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the incident.

Selection iSupport

Basics

From: bw@lblsoft.com Date: 11/25/2009 Time: 8:42 PM

To: sj@lblsoft.com Priority: Normal

Cc: CC: Others To Notify

Bcc:

Subject: More Information Required

Body Attachments

Please send me more details regarding the issue submitted on 11/25/2009 7:41:28 PM:
Ticket Number 9BQK523988 Slow performance on employee workstation.

Thank you,
Barry White

Send Cancel

When finished completing fields in the Correspondence dialog, click the Send button.

After the email is sent and the incident is saved, notations are included on the History tab as shown below:

Short Description:
Cannot connect to network

Approval
Audit
Correspondence
Customer
SLA
Work

Details History Required Data Assets Scans Ot

Approvals Configuration Items

Total Time Worked: 0 Hour(s) 0 Minute(s)

History Add Work History View Timeline

03-Nov-2009 1:59:37 PM - Barry White
Correspondence Sent With Attachment - More Information Required

Please send me more details regarding the item you submitted on 11/3/2009 11:29:43 AM.

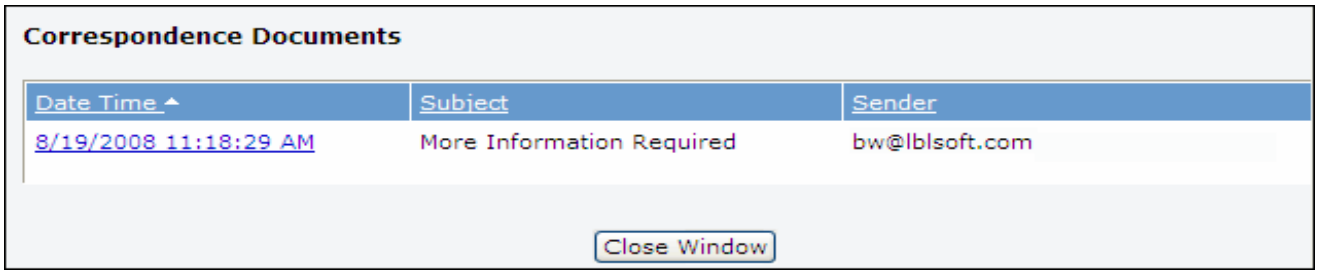
Thank you,

Barry White

From the Incident screen, you can select:

- Find | Correspondence | For Customer to display all correspondence sent to the customer from the Incident screen or the Customer Profile screen.

- Find | Correspondence | For Incident to display all correspondence sent from the current incident.



From the Correspondence Documents dialog, you can open a document by clicking on it. System-generated correspondence is not included in this dialog.

You can also view correspondence using views on the Desktop.

Assigning and Routing Incidents

There are several methods of routing; some or all of these methods of routing may be available to you depending upon configuration settings.

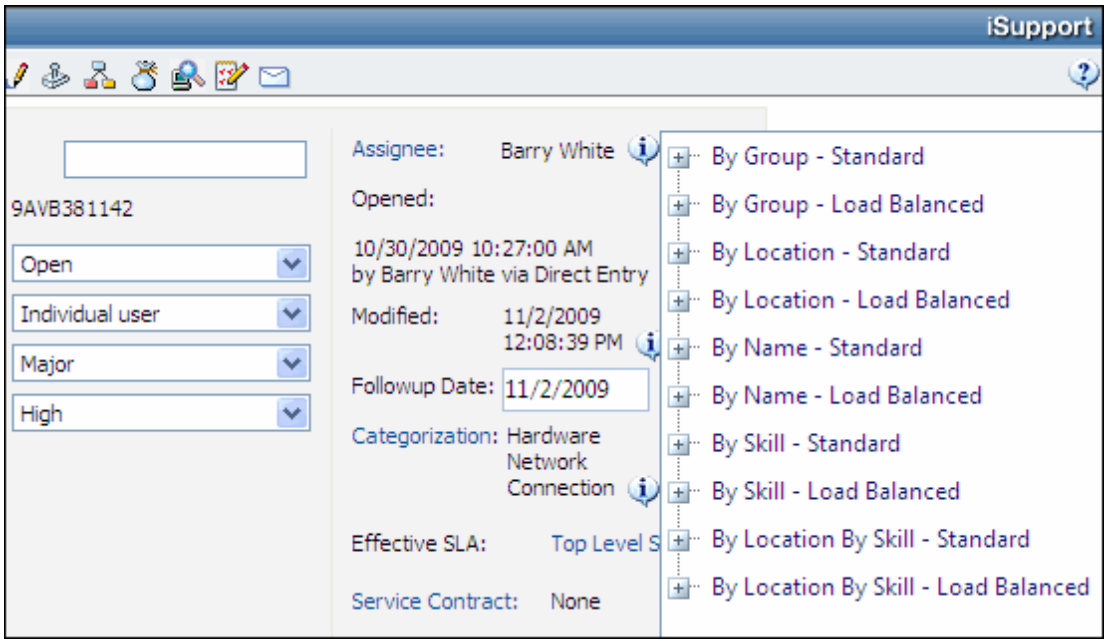
- **Group Based/Standard:** A list of groups appears; when you select a group, a list of support representatives in the group appears for selection. (These groups are set up in Support Representative records.)
- **Group Based/Load Balanced:** The support representative with the lightest workload in a group is selected.
- **Location Based/Standard:** A list of all available support representatives in a selected location appears.
- **Location Based/Load Balanced:** The support representative with the lightest workload within a location is selected.
- **Name Based/Standard:** A list of all available support representatives appears.
- **Name Based/Load Balanced:** The support representative with the lightest workload is selected.
- **Skill Based/Standard:** The category levels selected for the incident will appear; select the level of categorization that exactly matches the categorization for which support representative skills should be searched. For example, if the incident categorization is Hardware/Printers/Laser:
  - If you select Printers, those support representatives with a categorization of Hardware/Printers in their Support Representative record would be displayed for selection.
  - If you select Laser, those support representatives with a categorization of Hardware/Printers/Laser in their Support Representative record would be selected.
- **Skill Based/Load Balanced:** After you select the level of categorization for which support representative skills should be searched, a support representative is selected based on the workload of the support representatives who have the exact match of the selected categorization in their Support Representative record.

- **Location by Skill/Standard:** Support representative locations will appear; after selecting a location, the category levels selected for the incident will appear. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representatives in the selected location with matching skills are listed for selection.
- **Location by Skill/Load Balanced**: Support representative locations will appear; after selecting a location, the category levels selected for the incident will appear. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative in the selected location with matching skills and the lightest workload is selected.

Load balanced routing involves weights based on incident priority; these weights are set up during configuration.

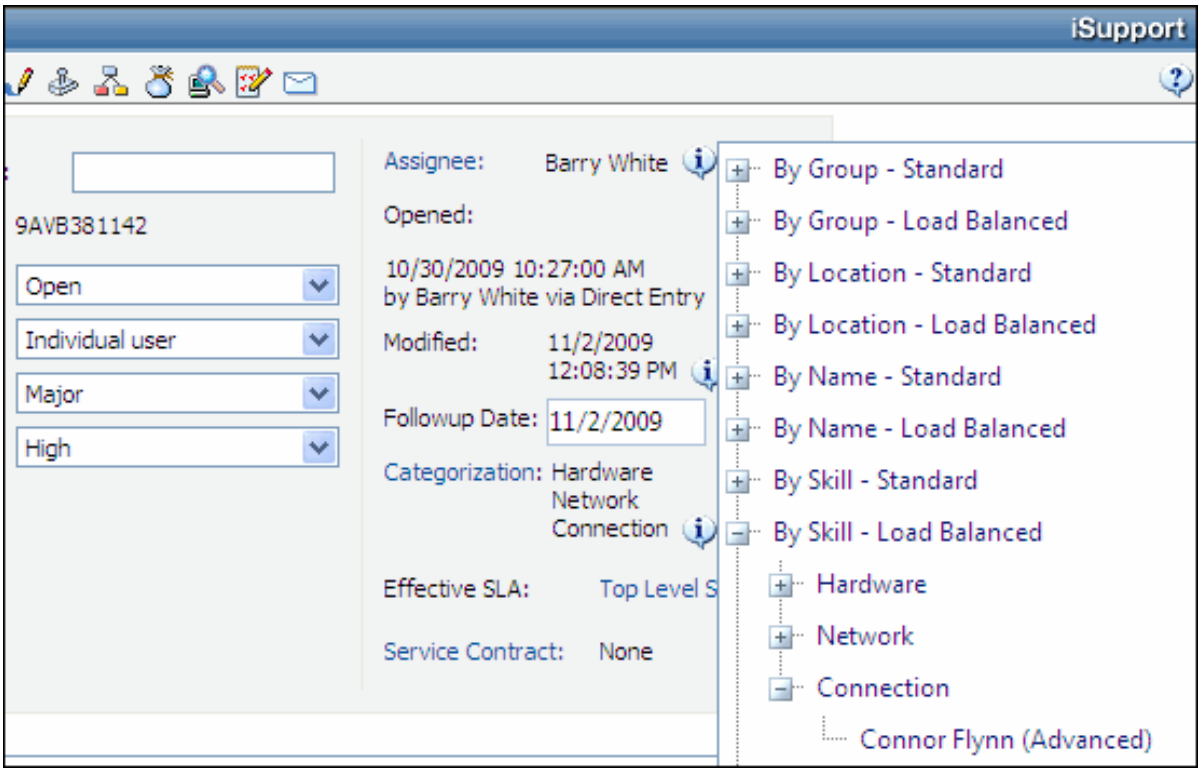
If a support representative has worked with an incident and the incident is reassigned, he/she will be bypassed until all available support representatives with the skill or in the group or location (depending on the method selected) have worked with the incident.

To route an incident, select Incident | Route or click the icon or the Assignee link. You can also route one or more incidents via the Desktop. Select the method to use for routing the incident.



If you selected **skill based standard routing**, select the level for which associated support representative skills should be searched. Support representatives with skills/categories in their Support Representative records that *exactly match that categorization level* will appear for

selection. If you selected a method with **load balanced routing**, the name of the person calculated to have the lightest workload will appear.



Routing to Yourself

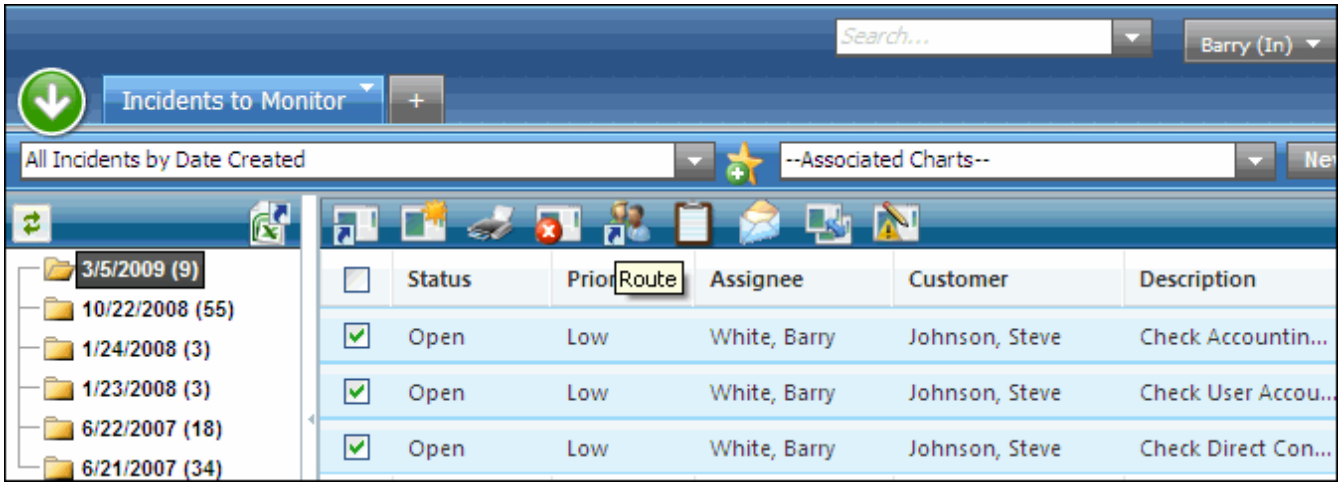
To route an incident to yourself (for example, if incidents are first routed to a queue), click the Route to Self icon. Your primary group will be used. If you wish to change your group, you'll need to use the Change Assignee's Group option or the routing dialogs (via the Route icon or Assignee link).

Entering Routing Comments

Once you click Finish, if routing notifications are enabled in configuration for the effective SLA, the Routing Comment dialog appears for you to enter a note to be included in the notification email to be sent to the new assignee. The note will be on the first line of the email.

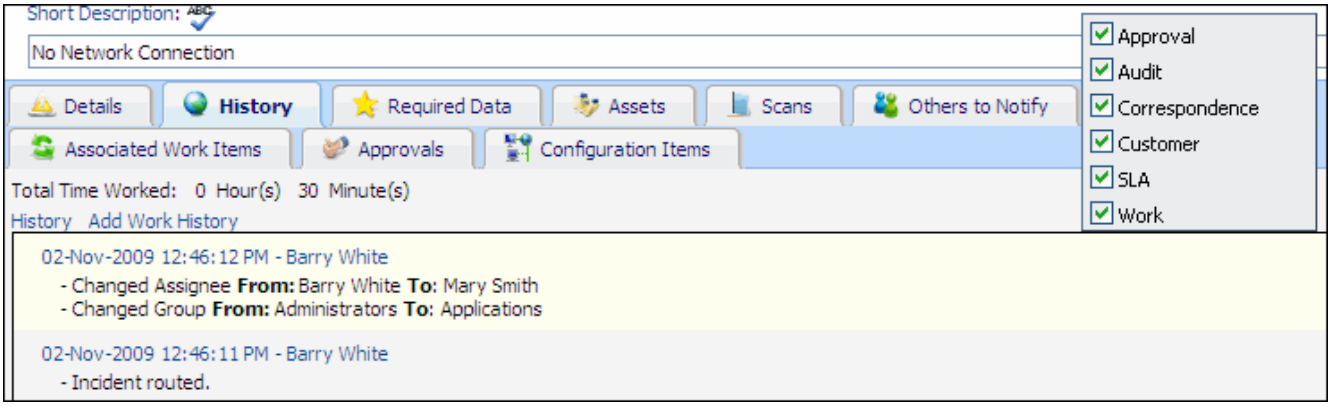
Routing Multiple Incidents via the Desktop

You can route incidents with an Open or Suspended status from views on the Desktop. Select the incidents to route, click the Route icon, and select Route. The routing dialogs will appear as in the Incident screen, except the skill-based routing and location by skill based routing methods will not be available. If load balanced routing is used, the selected incidents will be distributed evenly to the available support representatives in the selected group, location, or all (if using name-based routing). The same comment will be applied to all routed incidents. Note that incidents that are closed or pending approval cannot be routed.

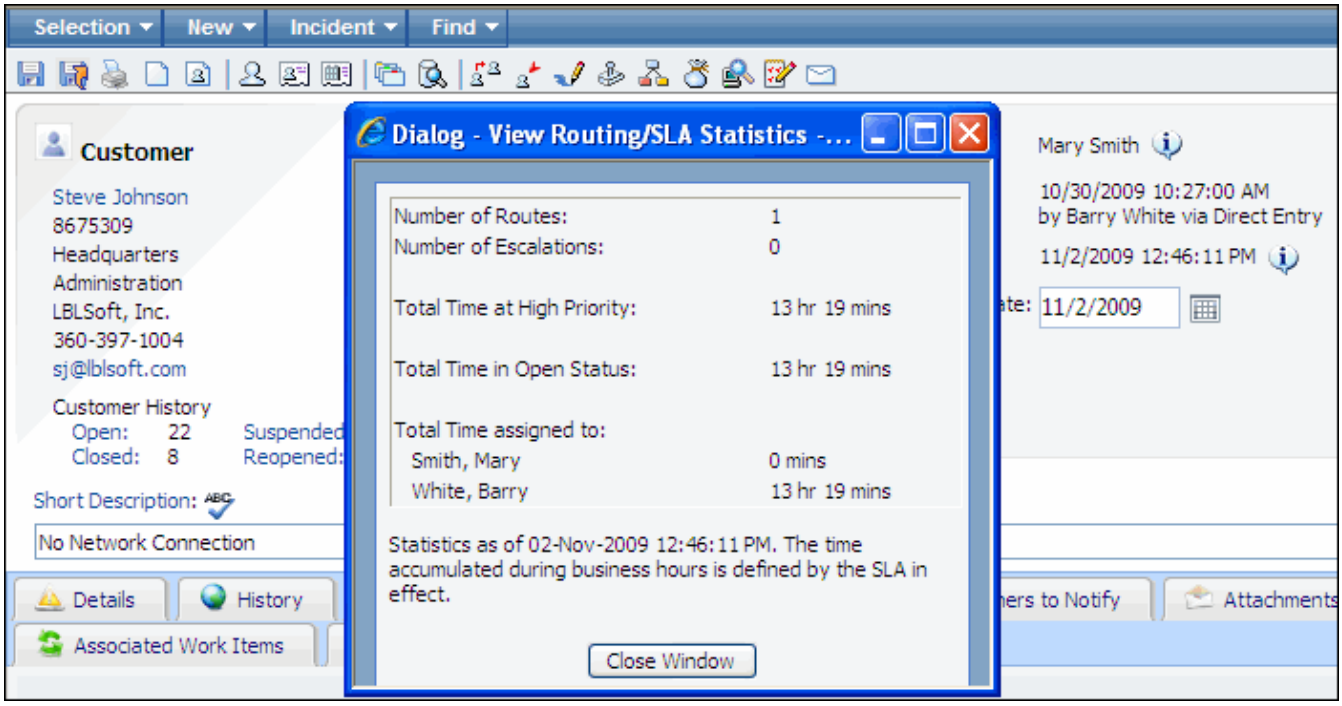


Viewing Routing Information

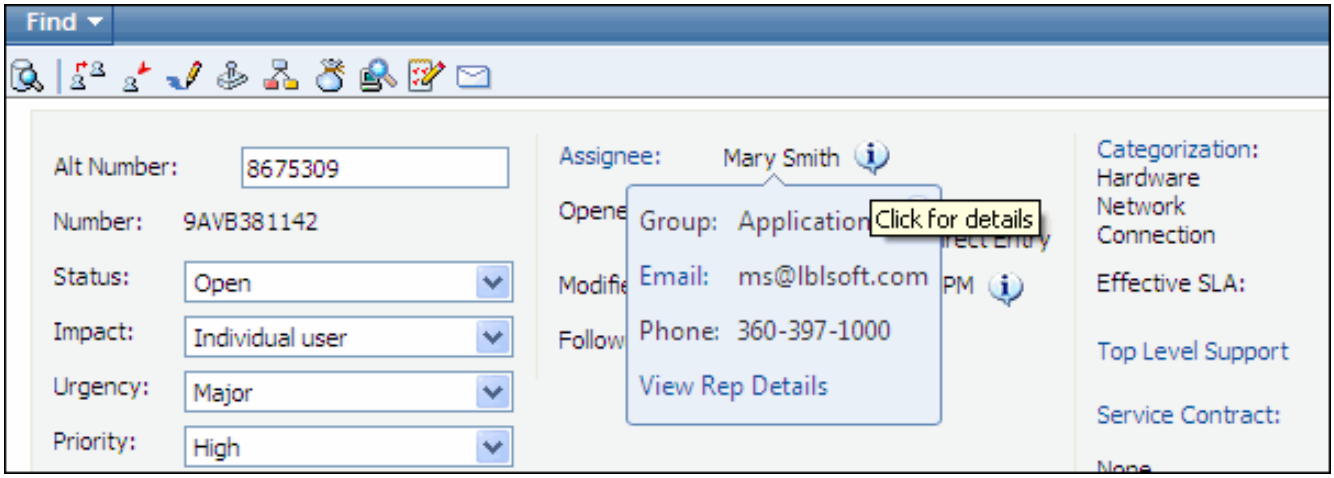
The Audit History entries on the History tab include the date and time of the route.



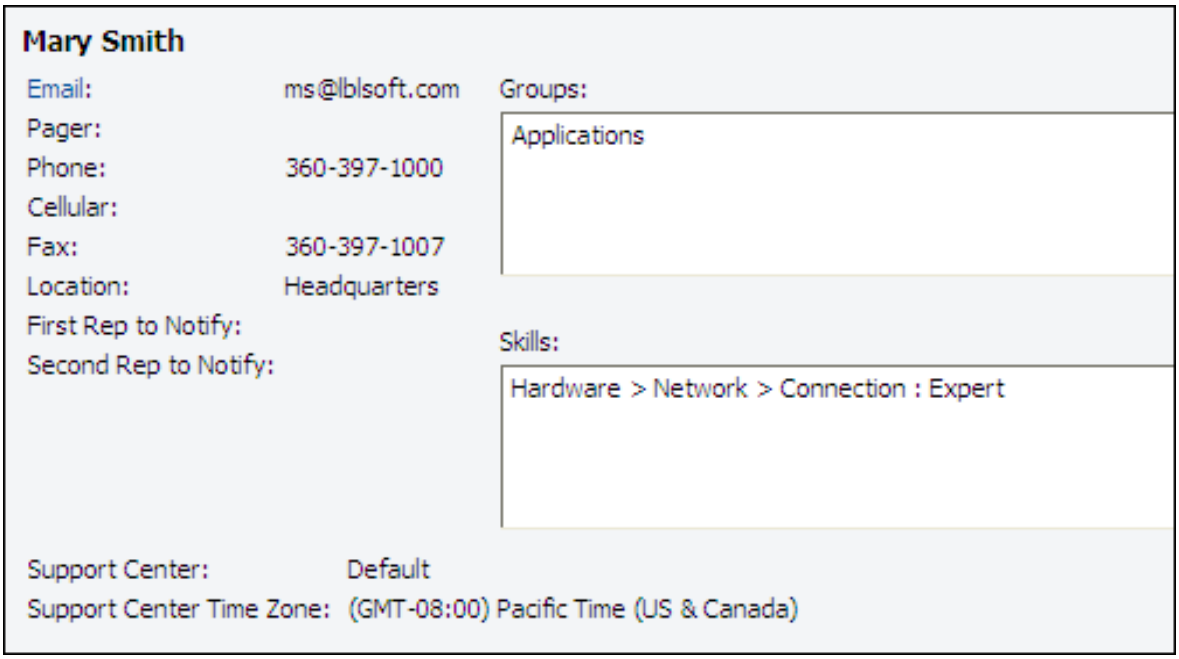
To view the number of times the incident has been routed, total time by status and priority, and the amount of time the incident has been assigned to each assignee, select Find | Routing/SLA Statistics.



Click the information icon next to the Assignee field to display the assignee's group, email address, and phone. You can click the Email link to send an email to the assignee.

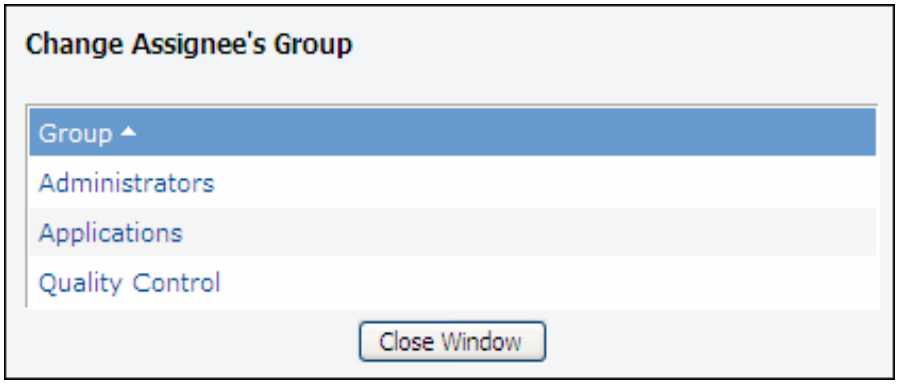


To view the assignee's contact information, skills, and groups, click the View Rep Details link. You can send an email or page from this dialog.



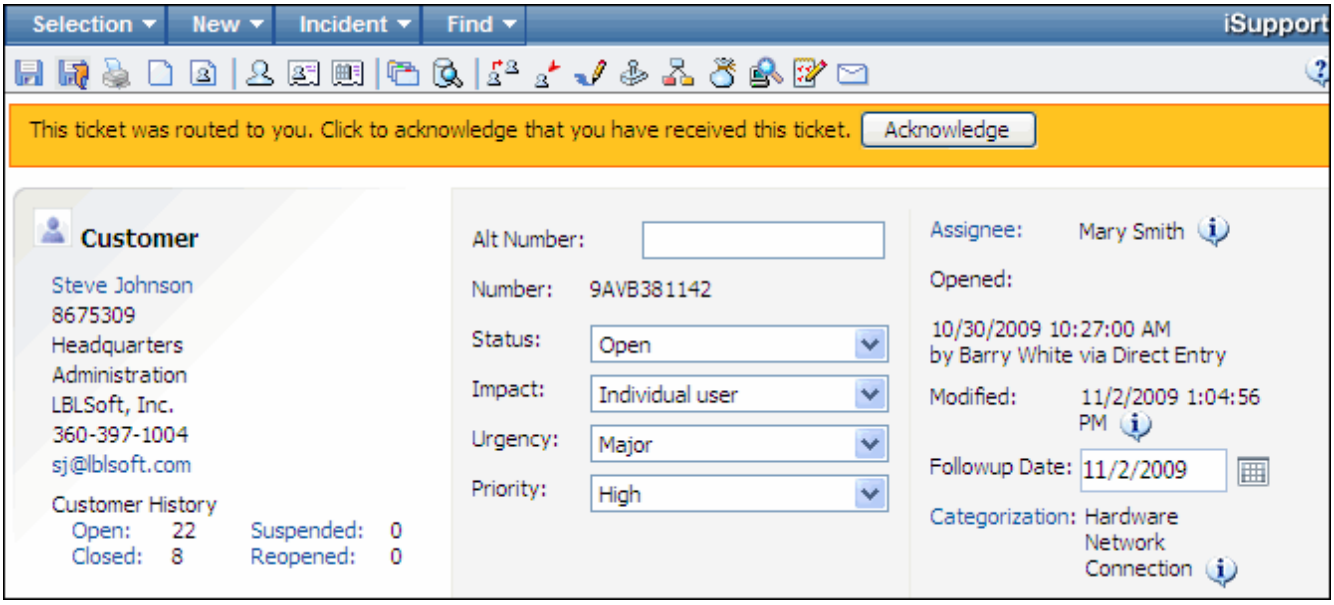
Changing an Assignee's Group

If an assignee is a member of more than one group, you can select Incident | Change Assignee's Group to change the assignee's group membership for an incident. Click on the appropriate group in the Select Group dialog.



Acknowledging a Routed Ticket

If ticket acknowledgements are enabled in configuration, the following alert bar will appear at the top of the screen to the new assignee:



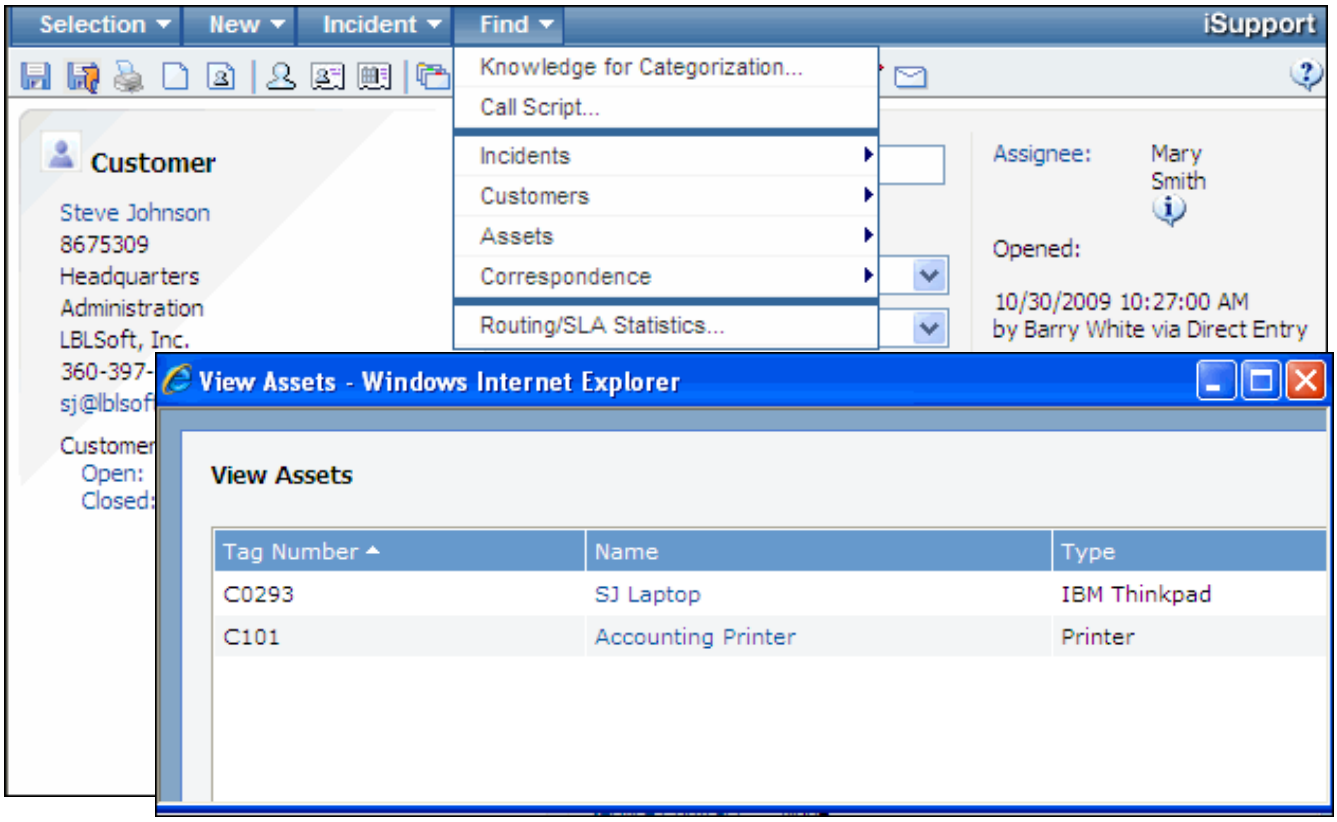
When the assignee clicks the Acknowledge button, an entry will be recorded in the Audit History field and an acknowledgement notification will be sent if configured.

Viewing Historical Information and Related Documents

Use options on the Find menu to view information on:

- Open, closed, or all incidents for the asset selected for the incident.
- Open, closed, or all incidents for the customer or the customer's company, location, or department.
- A customer's profile record.
- Additional customers.
- All correspondence sent to the customer from the Incident screen or the Customer Profile screen and all correspondence sent to the customer from the current incident.

- The asset record for the asset selected for the incident or all of the customer's assets.



Click on an item in a view to open it.

Viewing Incident Escalation

To ensure that incidents are resolved efficiently, iSupport can be configured so that incidents escalate based on certain factors. Incidents can be escalated by:

- **Increasing priority levels.** If an incident remains at a certain priority level without resolution for a period of time longer than a specified time limit, the incident escalates to the next (higher) priority level.
- **Reassignment** based upon skill or group. If the assignee does not close the incident within a defined period of time, it will be automatically routed/reassigned to another support representative based upon their skill (set up in the Support Representative Profile screen) or group (the person in the group with the lightest workload). An incident can be auto-reassigned up to four times.

Custom SLA settings can be associated with a category combination or customer. For example, a set of tighter thresholds can be defined for premier customers and a set of more generous thresholds can be defined for standard customers. Custom SLA settings can be assigned to incident templates, categories, customers, and companies. The order in which SLAs are applied to incidents is as follows:

- If the configured winner of a category and customer SLA conflict is set to Customer:

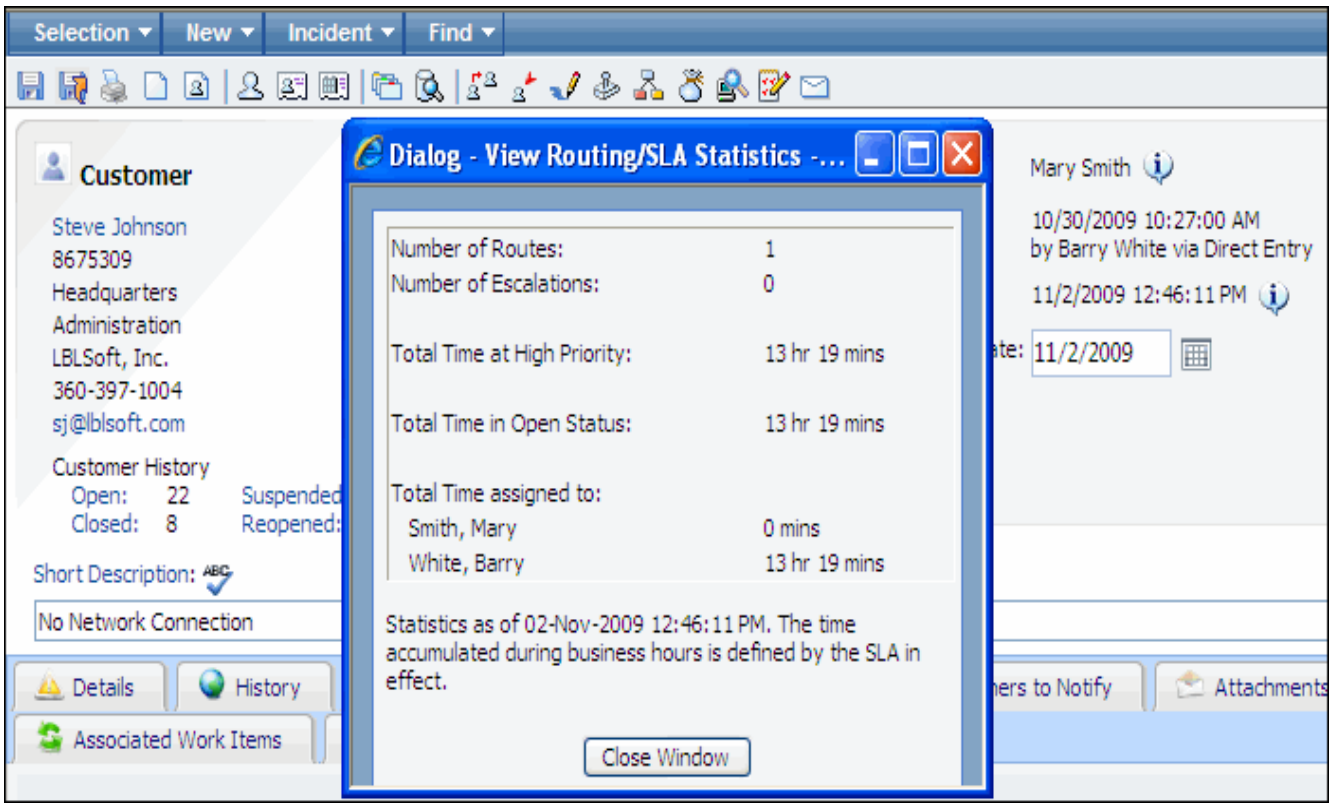
- Incident created; default SLA applied.
- The customer and customer's company are checked for custom SLAs; if both have a custom SLA, the customer's custom SLA is always applied. In the absence of a customer custom SLA or company custom SLA, if the categorization has a custom SLA, it is applied.
- If an incident template is applied and it has a custom SLA, it will override any other SLA.

- If the configured winner of a category and customer SLA conflict is set to Category:
  - Incident created; default SLA applied.
  - If the categorization has a custom SLA, it is applied. In the absence of a categorization custom SLA, the customer's company and customer are checked for custom SLAs; if both have a custom SLA, the customer's custom SLA is always applied.
  - If an incident template is applied and it has a custom SLA, it will override any other SLA.

Consult with your administrator regarding escalation time frames in order to understand how quickly incidents must be resolved.

You may be assigned to a support center with a time zone, and that time zone will used for business hour statistics and service level agreement calculations. (In the Incident screen, the assignee's support center will be used.)

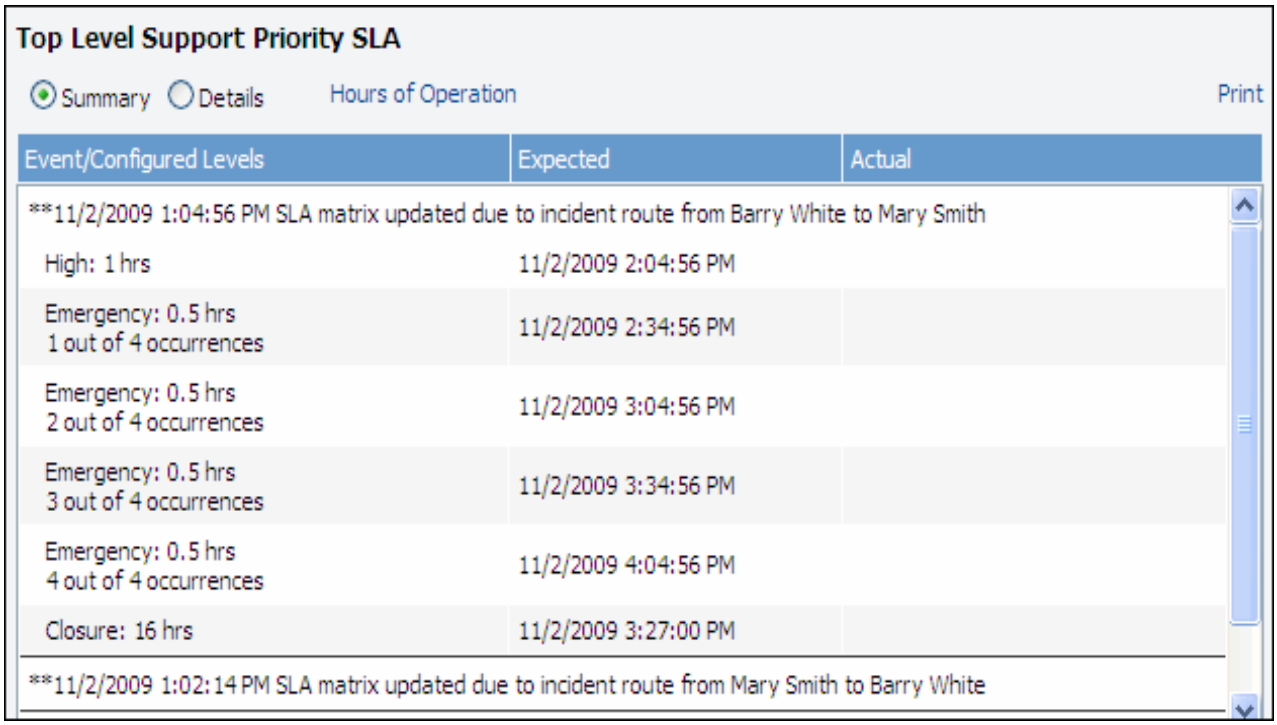
To view the number of times the incident has escalated, total time by status and priority, and the amount of time the incident has been assigned to each assignee, select Find | Routing/SLA Statistics.



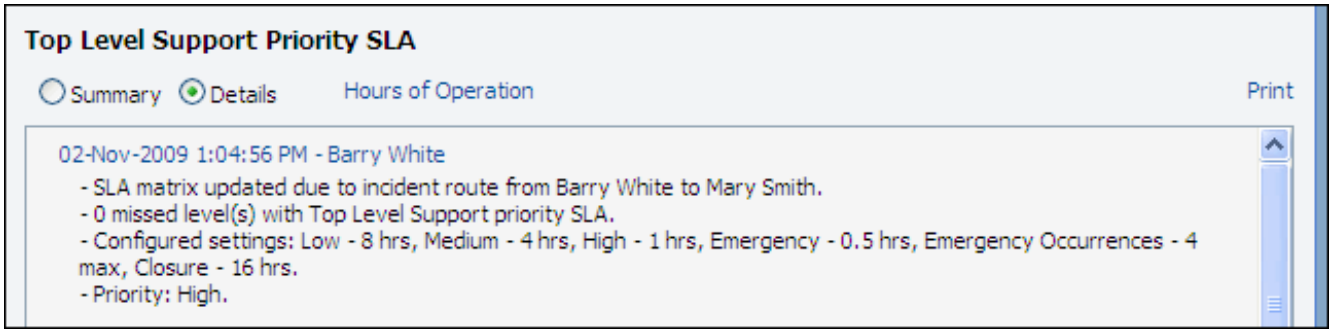
Using the Effective SLA Dialog

You can view more complete escalation information by clicking the name of the service level agreement (in the Effective SLA field). The Effective SLA dialog includes summary and detail information about the service level agreement in effect for the incident, including configured settings and any changes to those settings, notifications sent, expected and actual escalation dates and times. You can also view the hours of operation in effect for the SLA. ***Note that timeframes reflect the assignee's support center timezone. The Expected Escalation dates and times reflect the points at which the incident is eligible to escalate. The actual escalation date and time will depend on execution of the SLA agent.***

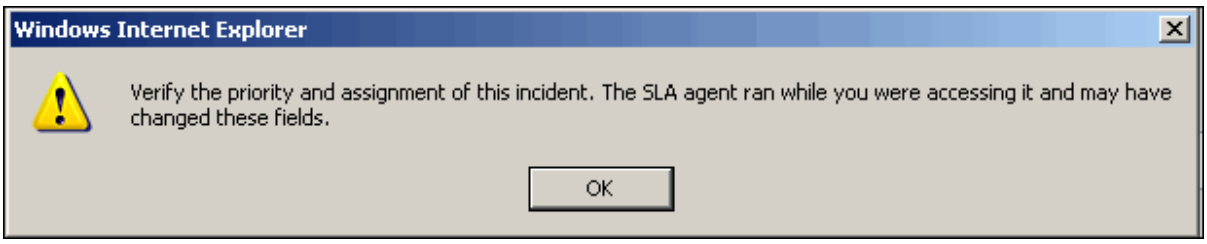
The Summary radio button displays initial service level agreement settings and any changes applied, and expected and actual escalation dates and times.



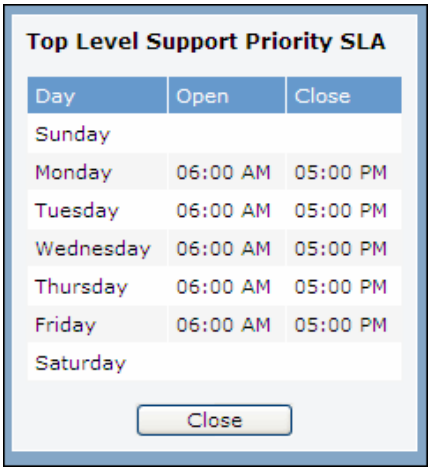
The Details radio button displays information on configured settings, changes, and each escalation event including notifications sent, and reassignments and priority changes due to escalation.



While viewing the incident, the following dialog may appear when you save the incident if the SLA agent runs and changes either the priority or the assignment of the incident due to escalation.

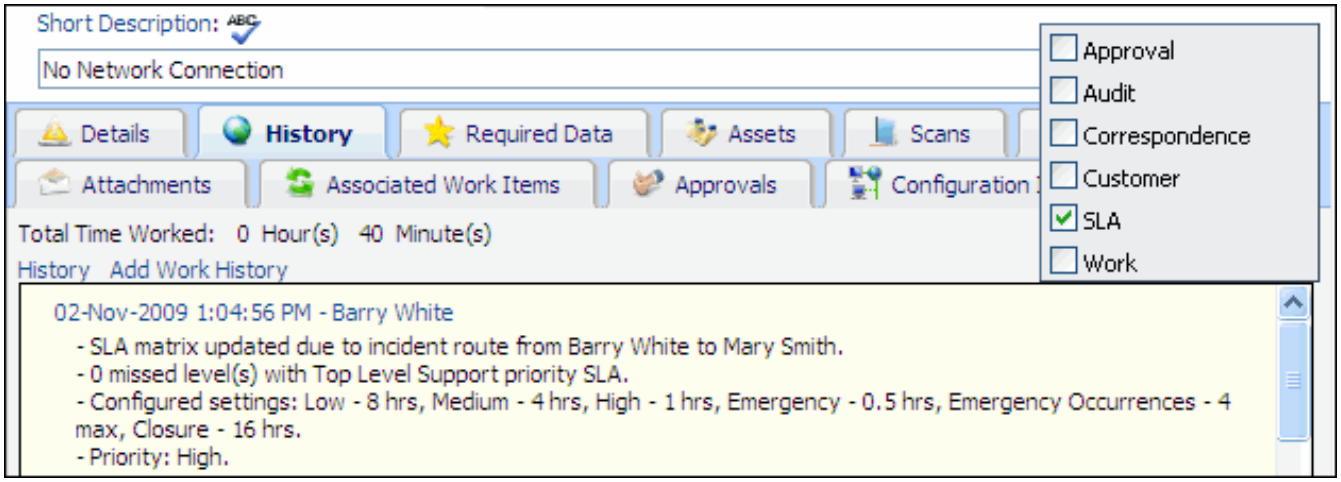


The Hours of Operation link displays the timeframes during which escalation applies for the SLA in effect.



Viewing the SLA Events on the History Tab

The SLA checkbox on the History tab will display all events such as including initial SLA settings upon incident creation, notifications sent, and reassignments and priority changes due to escalation.



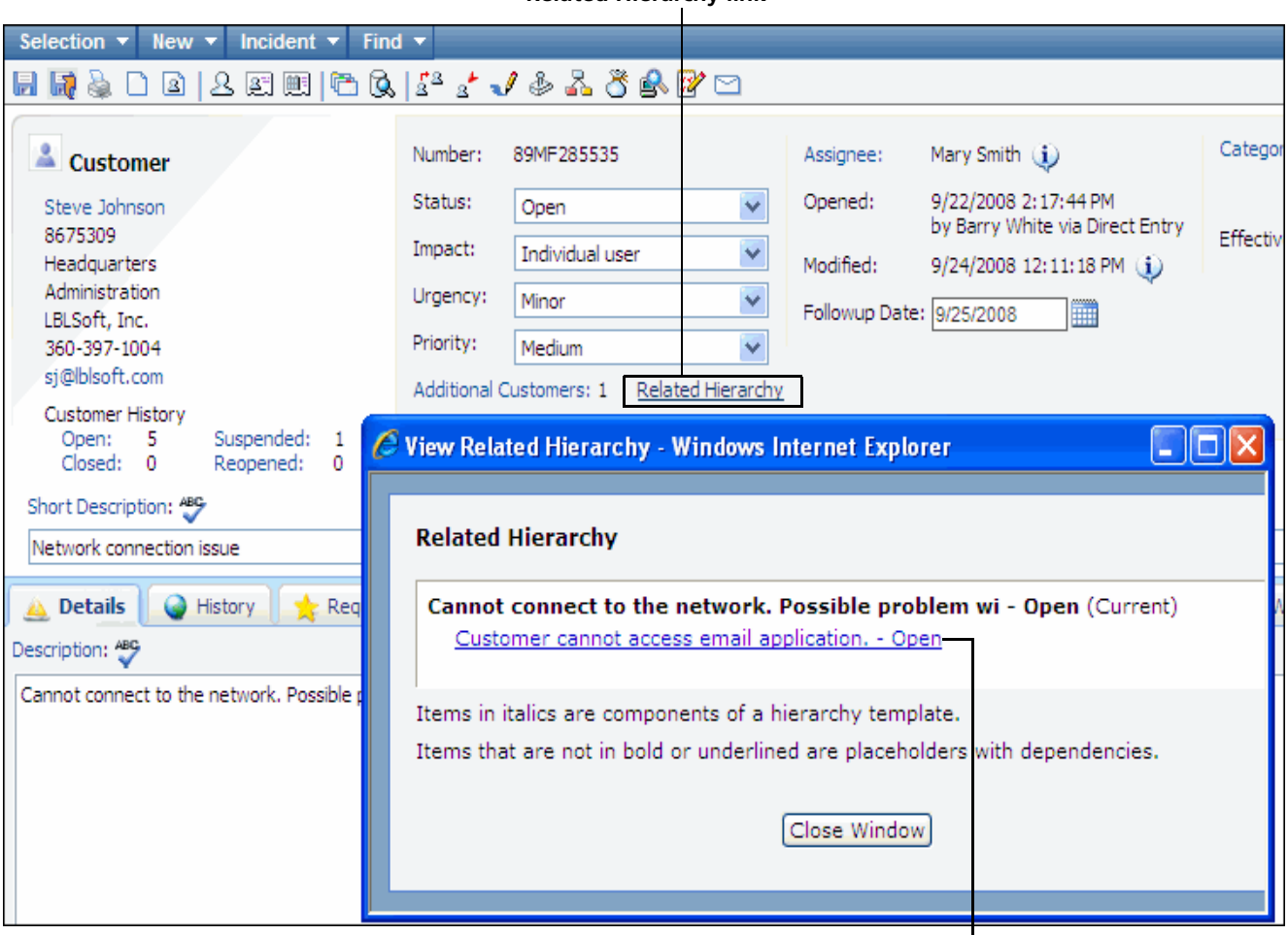
Creating Incident Hierarchy Structures

Creating Related Incidents

You can create related incidents to associate and track issues and requests. For example, for an incident regarding a Toner Low notification on a printer, you could create a related incident for ordering more toner for the printer. You can close all related incidents when you close the original incident.

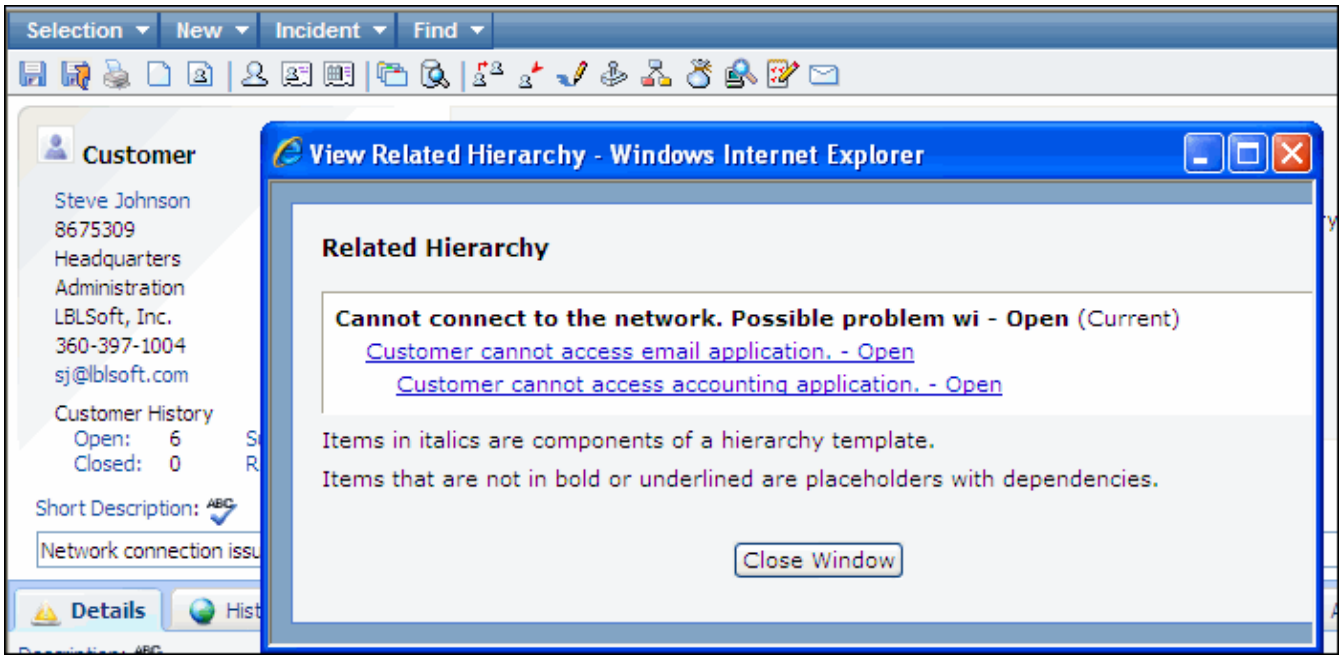
If creating a related incident for a different customer, select New | Related Incident. If creating a related incident for the same customer, select New | Related Incident Same Customer. Complete the fields and save the incident. Then save the original incident. A Related Hierarchy link appears below the Categorization field as shown below; related incidents are indented in the Related Hierarchy dialog.

Related Hierarchy link



Items that are underlined are the issue descriptions of related incidents. To view an incident, click on it.

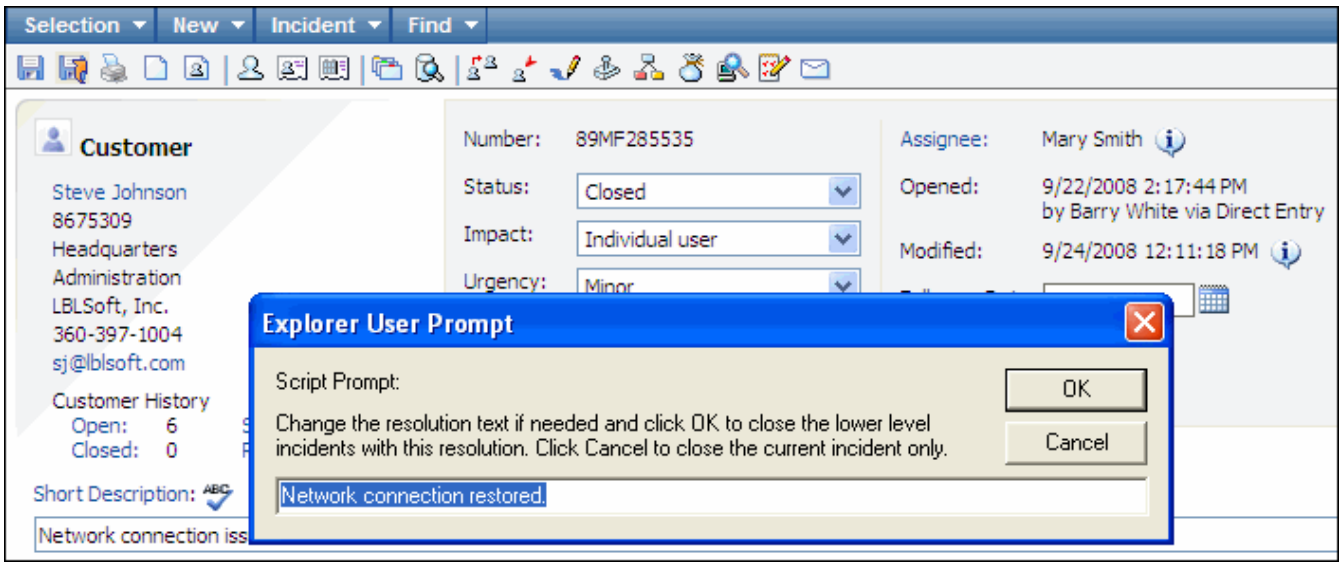
If you open a related incident and then create and save another related incident, a hierarchy would be created as shown below. In iSupport, a structure created in this manner is called a *dynamic hierarchy* because you can add and remove incidents as needed.



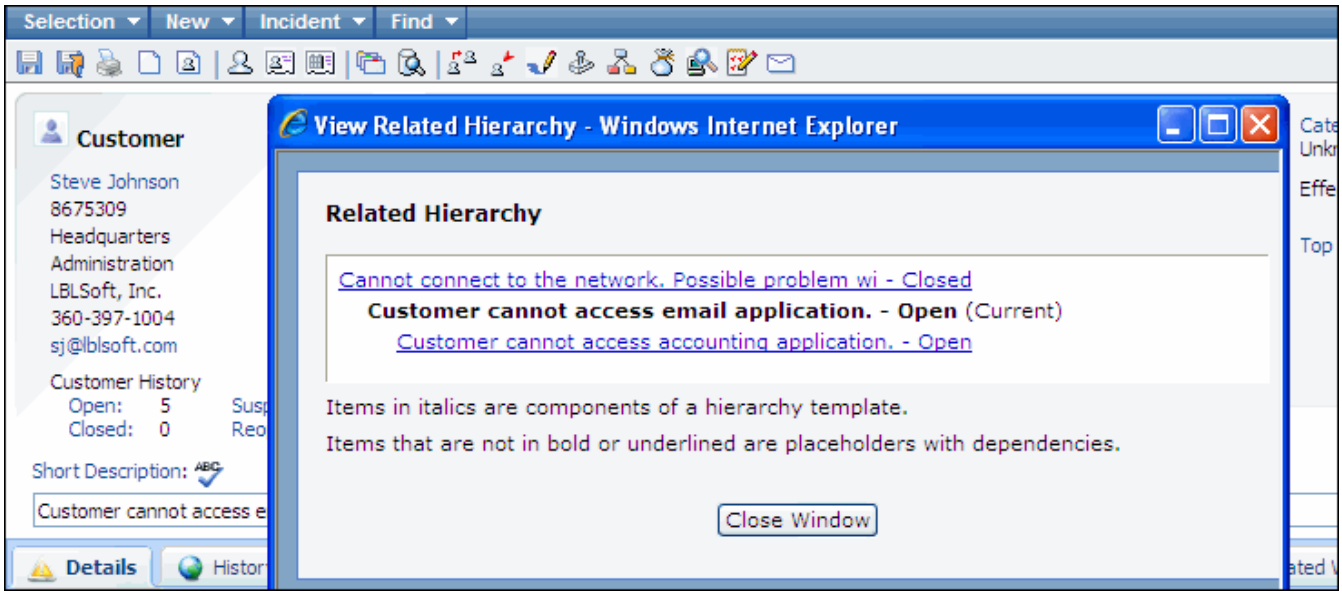
Related incidents can be inserted into the hierarchy. For example, in the hierarchy shown above, you can open the Customer Cannot Access Email Application incident and select New | Related Incident or New | Related Incident Same Customer to add an incident under the open incident.

Closing Related Incidents

When you enter an issue resolution and close an incident with one or more lower level related incidents, a prompt will appear for closing the related incidents.



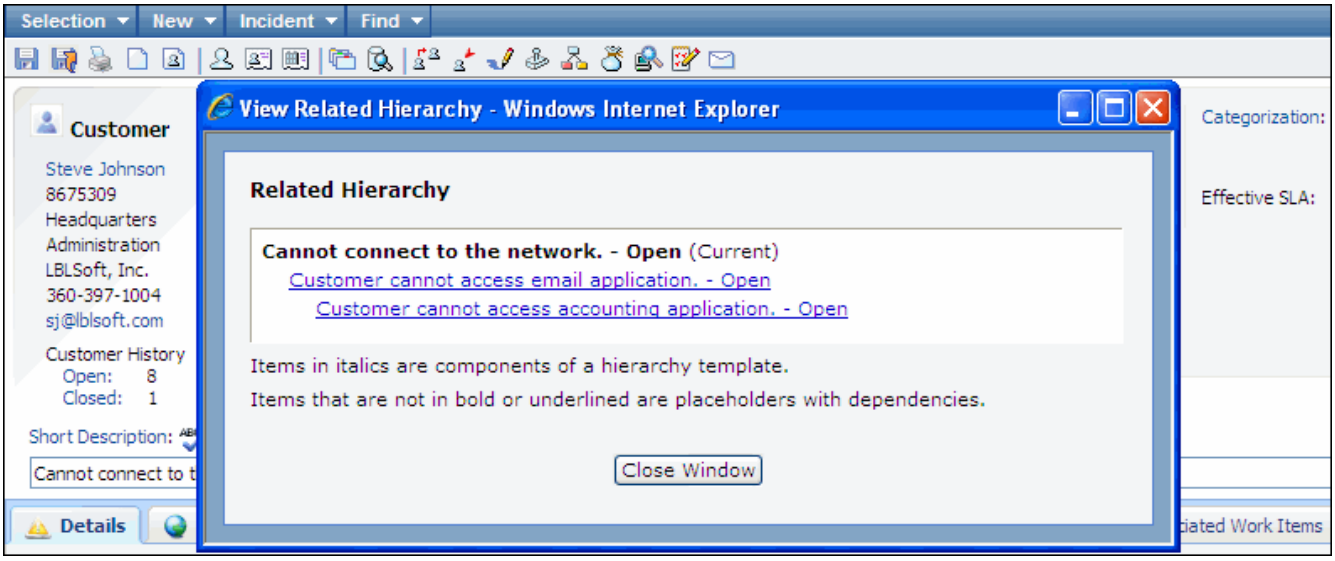
If you select OK, the resolution will be appended to any existing resolution in the lower level incidents and the lower level incidents will be closed. If you select Cancel, the lower level incidents will remain open as shown below.



For information on closing related incidents in a more complex incident structure, see "Closing Incidents in a Hierarchy Template Structure" on page 244.

Removing Incidents in a Dynamic Hierarchy

Select Incident | Remove From Hierarchy if you need to remove an incident from a dynamic hierarchy structure.



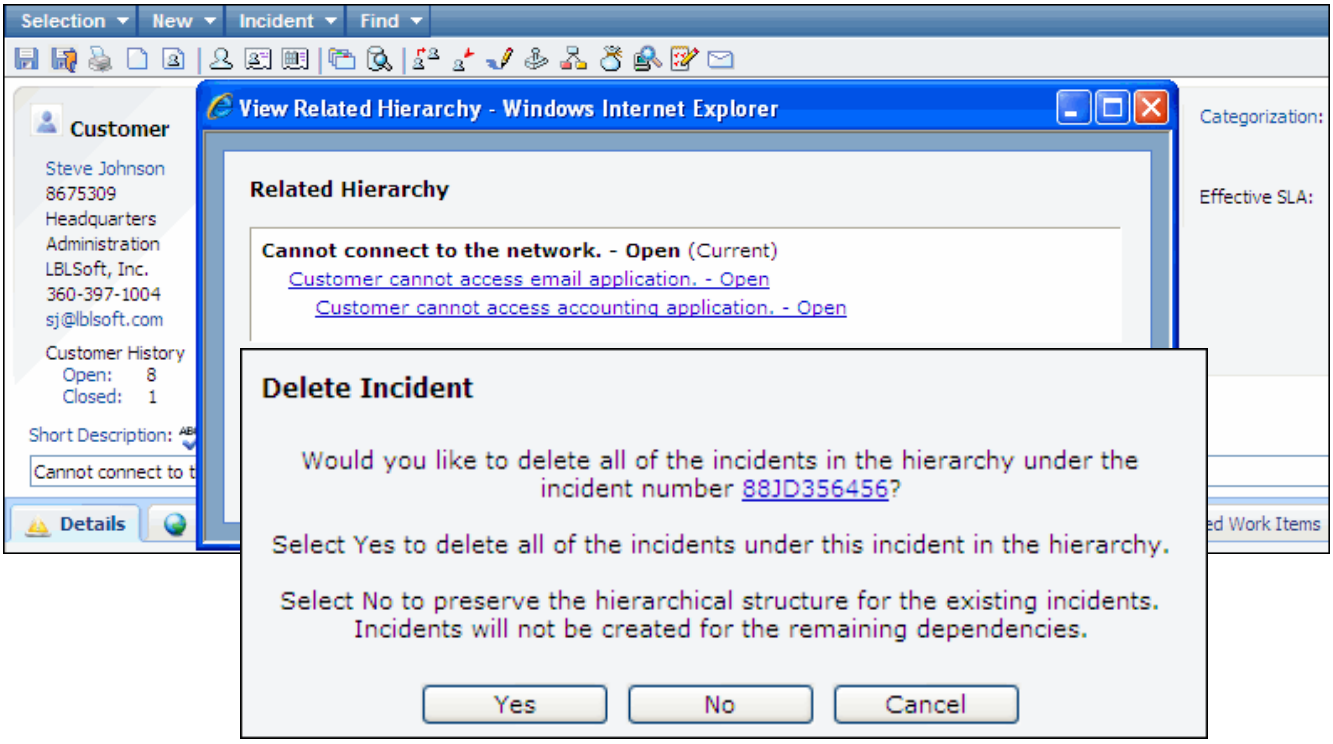
There are three removal options:

- You can remove **the current incident but not its related incidents** from the hierarchy. The current incident will become an independent incident. In the example above, if you remove the Cannot Connect to the Network incident, its lower level incidents will retain their structure.

- You can remove **the current incident and its related incidents** from the hierarchy. In the example above, you could open the Customer Cannot Access Email Application incident and remove it as well along with its lower level incident (Customer Cannot Access Accounting Application).
- You can remove **the related incidents under the current incident but not the current incident**. The first level being removed will become the top level for its related incidents in a separate dynamic hierarchy. In the example above, the current incident is Cannot Connect to the Network. You could remove the Customer Cannot Access Email Application incident and its lower level incident (Customer Cannot Access Accounting Application), and those incidents would retain their relationship. The Cannot Connect to the Network incident would become a standalone incident.

Deleting Incidents in a Dynamic Hierarchy

When you delete an incident in a dynamic hierarchy, a prompt will appear with the option of deleting its lower level incidents.

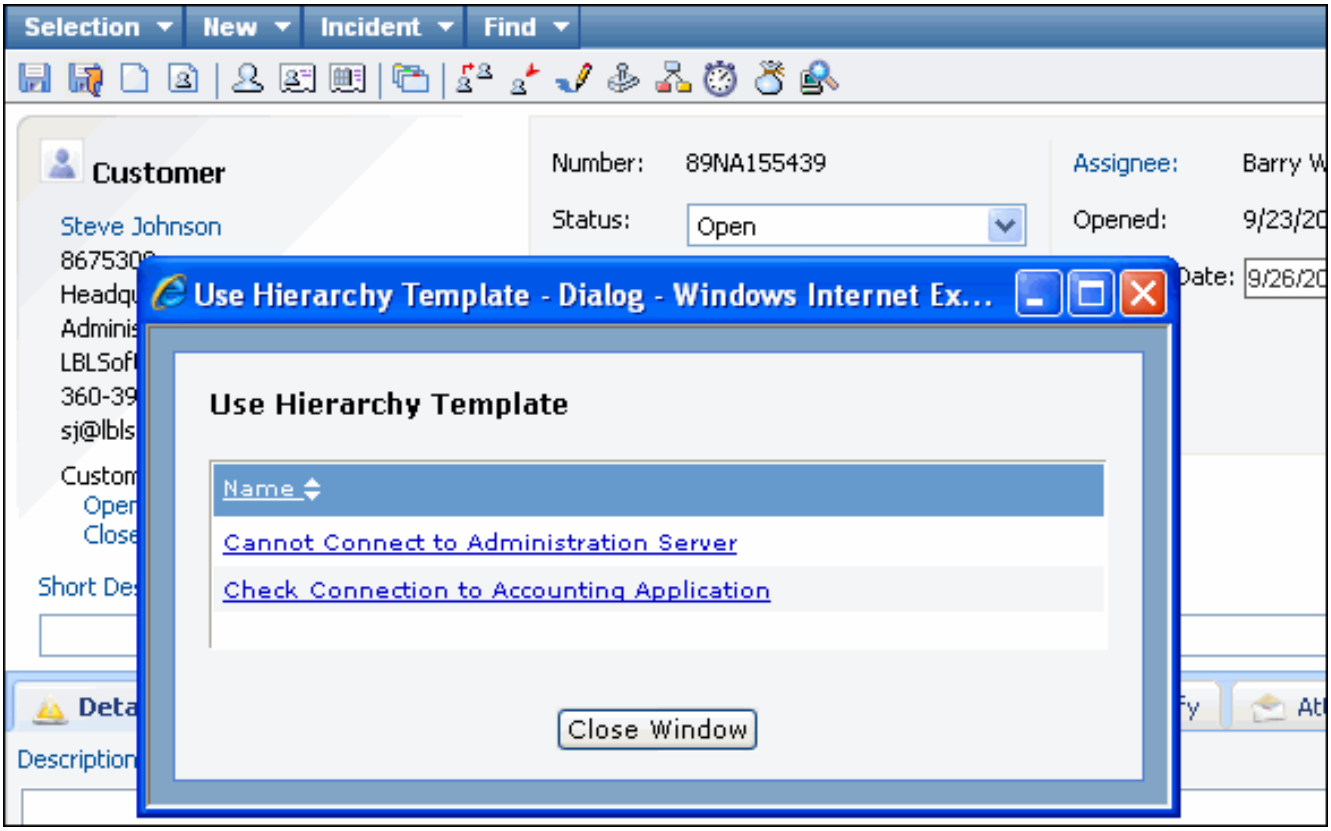


In the example above, if you delete the top level Cannot Connect to the Network incident, the prompt appears. If you select No, the lower level incidents will not be deleted and will retain their structure.

Using Hierarchy Templates

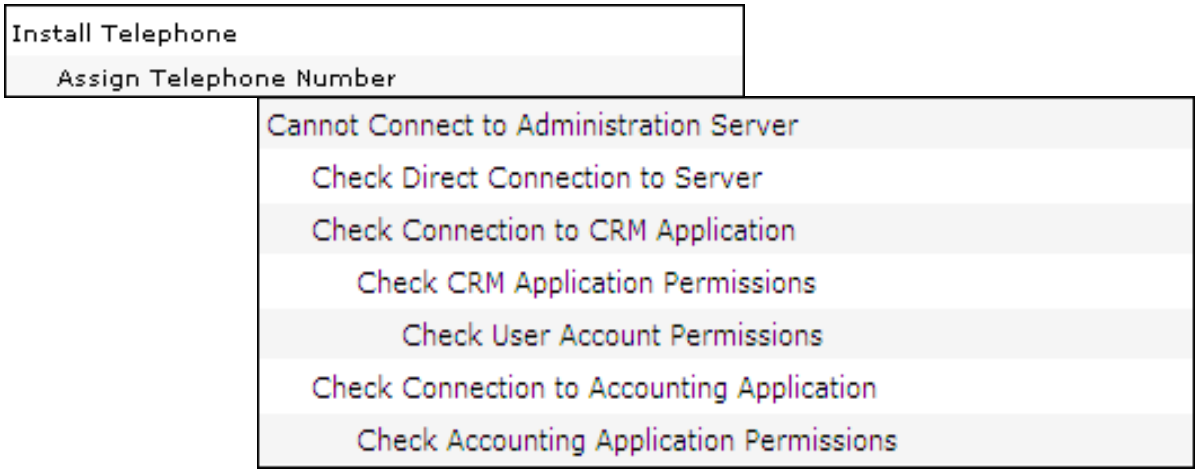
Hierarchy templates function similar to incident templates in that incident fields are populated. However, hierarchy templates consist of a structure with multiple levels and closure dependencies. Existing incident functionality such as escalation, routing, and followup dates apply to incidents created from a hierarchy template. However, the auto-close option cannot be set for a hierarchy template.

To use a hierarchy template, select Incident | Use Hierarchy Template or click the Use Hierarchy Template icon.



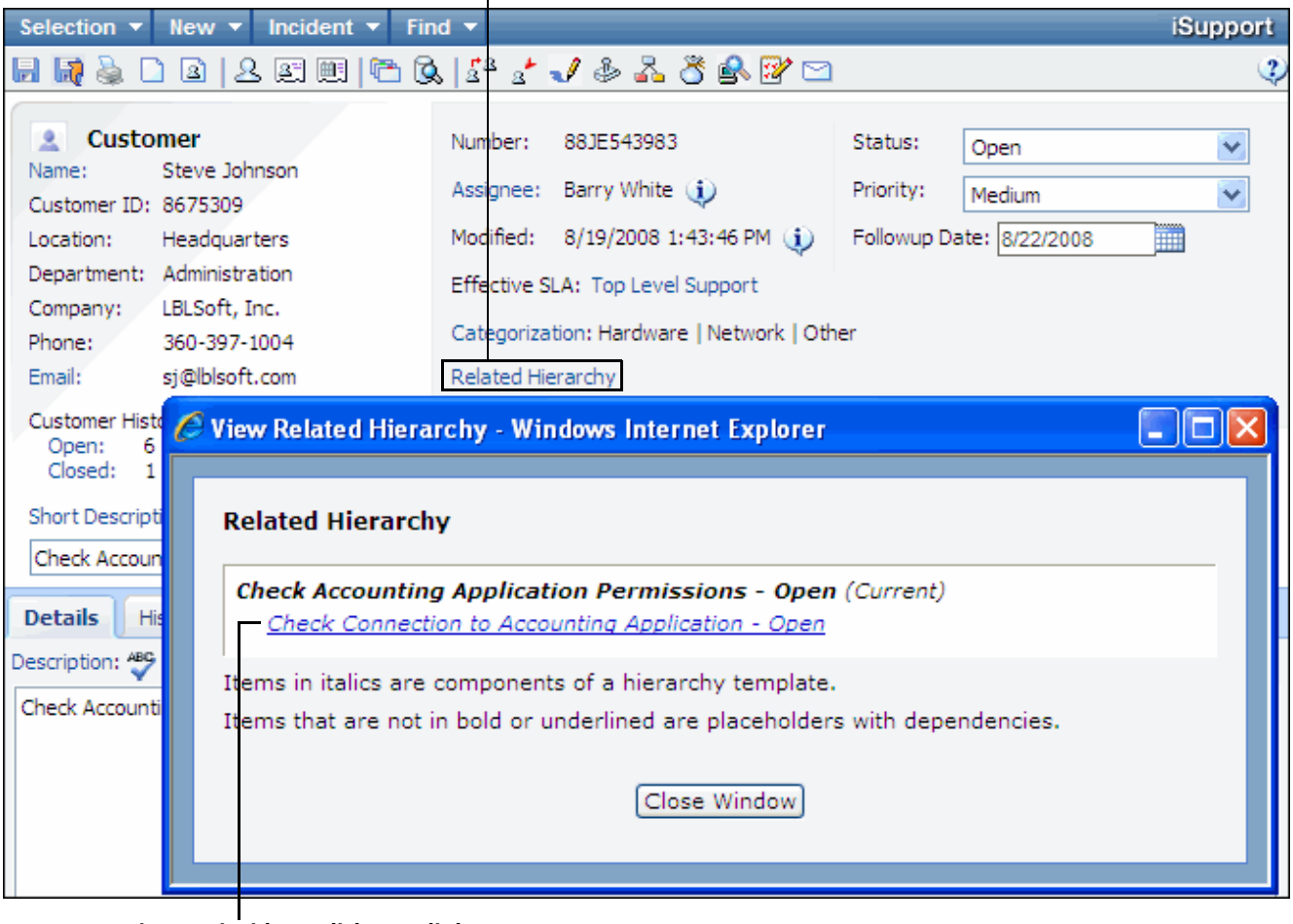
Only top-level templates appear in the Incident screen for selection. When you select a hierarchy template, the top-level template is applied to the incident and the template structure is copied to the incident.

A hierarchy template structure can contain any number of templates and levels. Examples are shown below.



When you select a hierarchy template in the Incident screen and save the incident, a Related Hierarchy link appears below the Customer History fields for viewing the structure.

Related Hierarchy link displays the incident structure



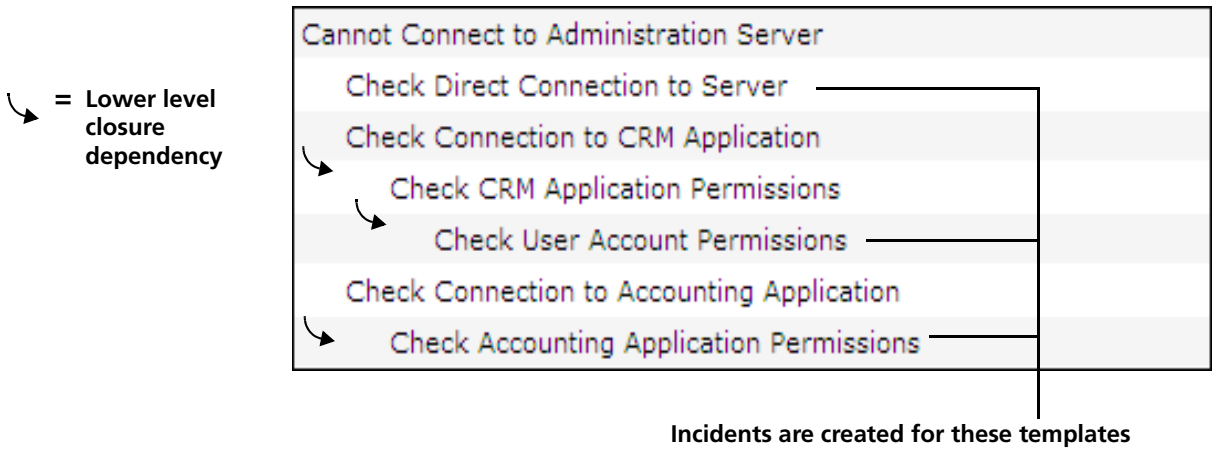
To view an incident, click on a link.

When you select a template with one lower level template, the top level template is applied to the current incident and an incident is created from the lower level template. In the example above,

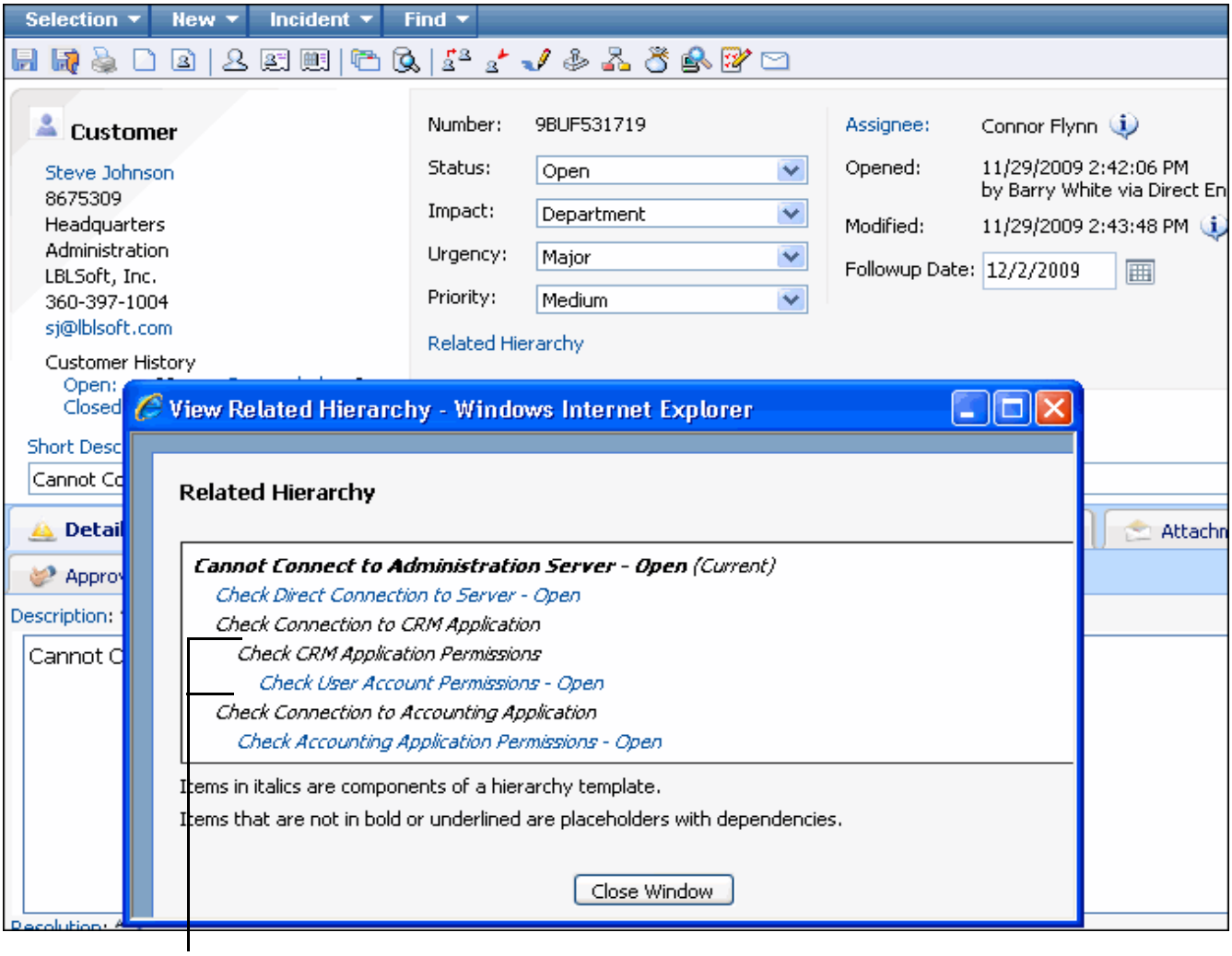
the Check Connection to Accounting Application template was selected in the Incident screen and an incident was also created from the Check Accounting Application Permissions template.

If a top level incident is a scheduled ticket, any lower level incidents will not be created (and the Related Hierarchy link will be inactive) until the top level incident has an Open status.

When a hierarchy template contains three or more levels, a closure dependency exists for the lowest levels. In addition to the top level template being applied to the current incident, an incident is created for the lowest level incidents.

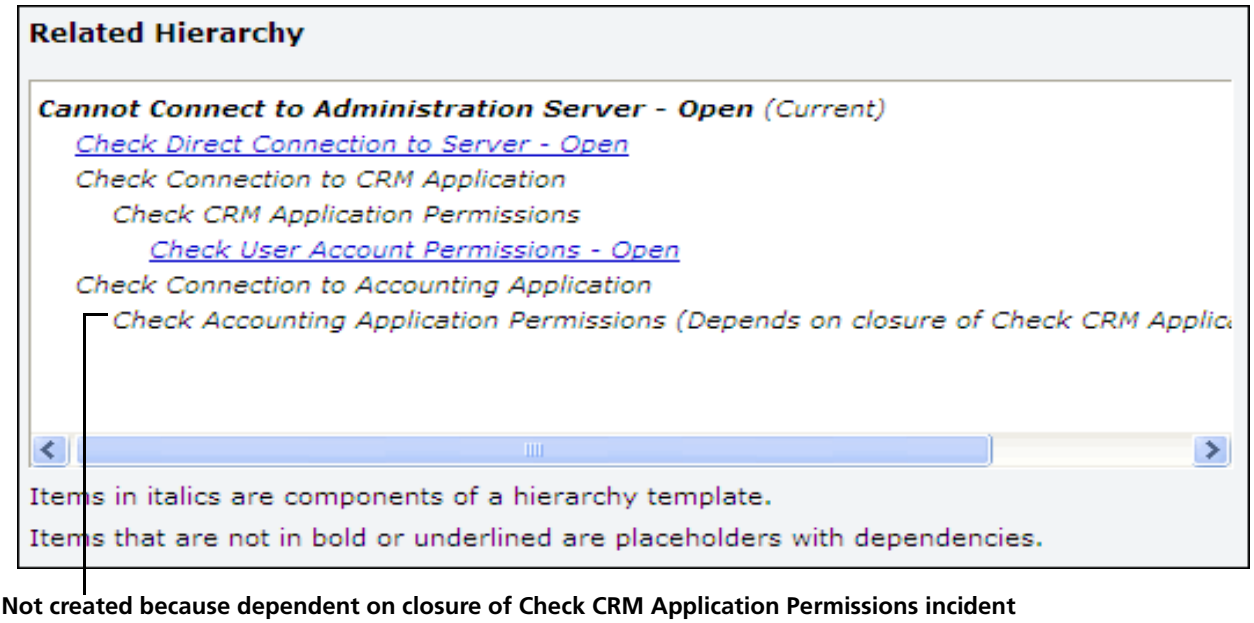


A placeholder will appear for a template with a closure dependency on an open lower level incident. An incident will be created from the template placeholder when the lower level incident is closed. In the example below, the Check Connection to CRM Application, Check CRM Application Permissions, and Check Connection to Accounting Application items are template placeholders that are dependent on closure of their lower level incidents.



Items that are underlined are the issue descriptions of incidents that have been created because they have no closure dependencies.

In addition to lower level closure dependencies, a template can also contain a dependency that is defined when the template is configured. In the example below, an incident will not be created for the Check Accounting Application Permissions template until the Check CRM Application Permissions incident is created and closed.

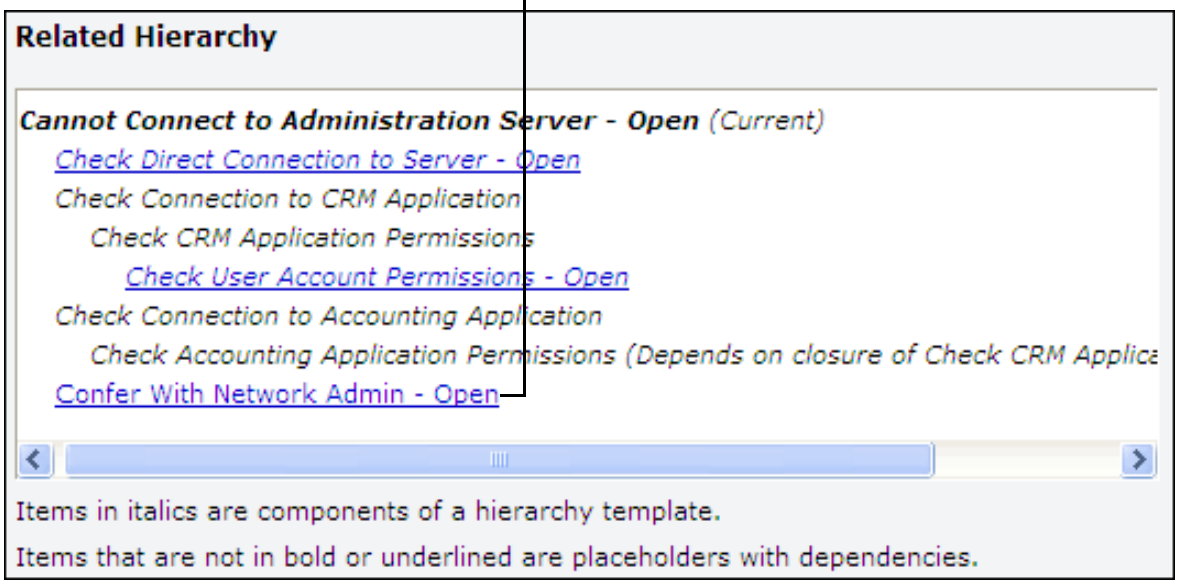


Adding Incidents to a Template Hierarchy

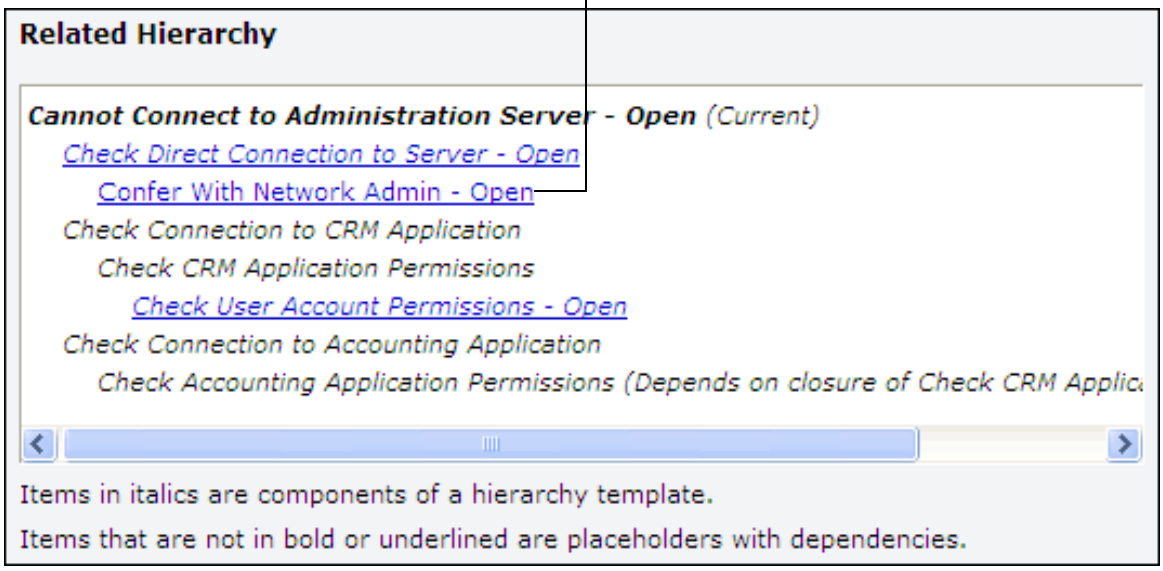
To add an incident or an incident and its hierarchy to an incident in a hierarchy template structure, you can do the following:

- Select New | Related Incident or New | Related Incident Same Customer:

Added to Cannot Connect to Administration Server top level incident using New | Related Incident

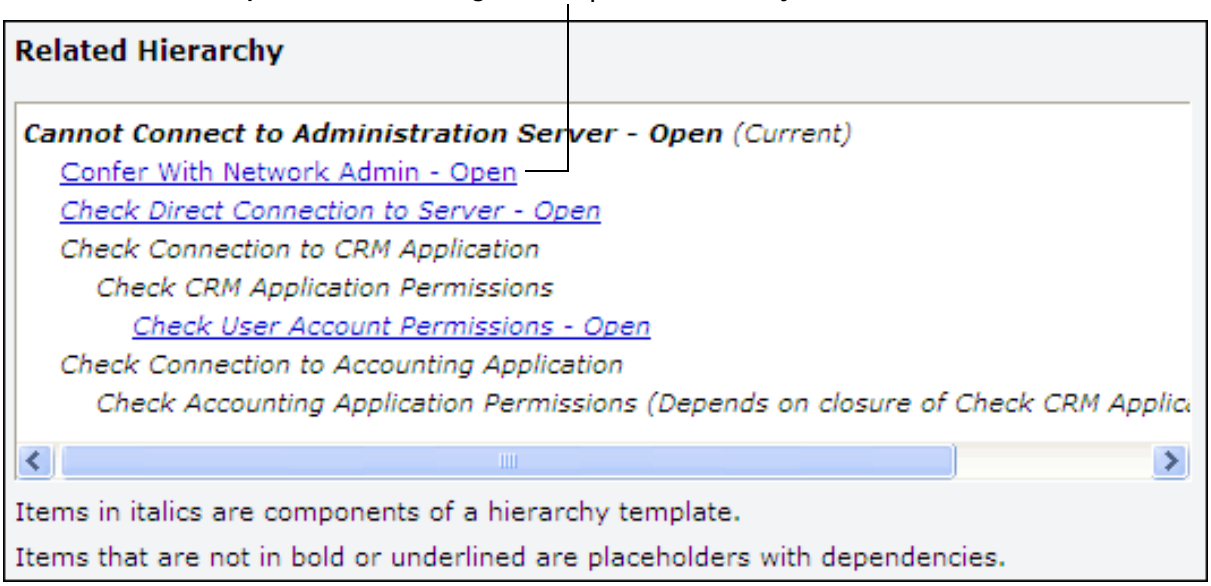


Added to Check Direct Connection to Server lower level incident using New | Related Incident

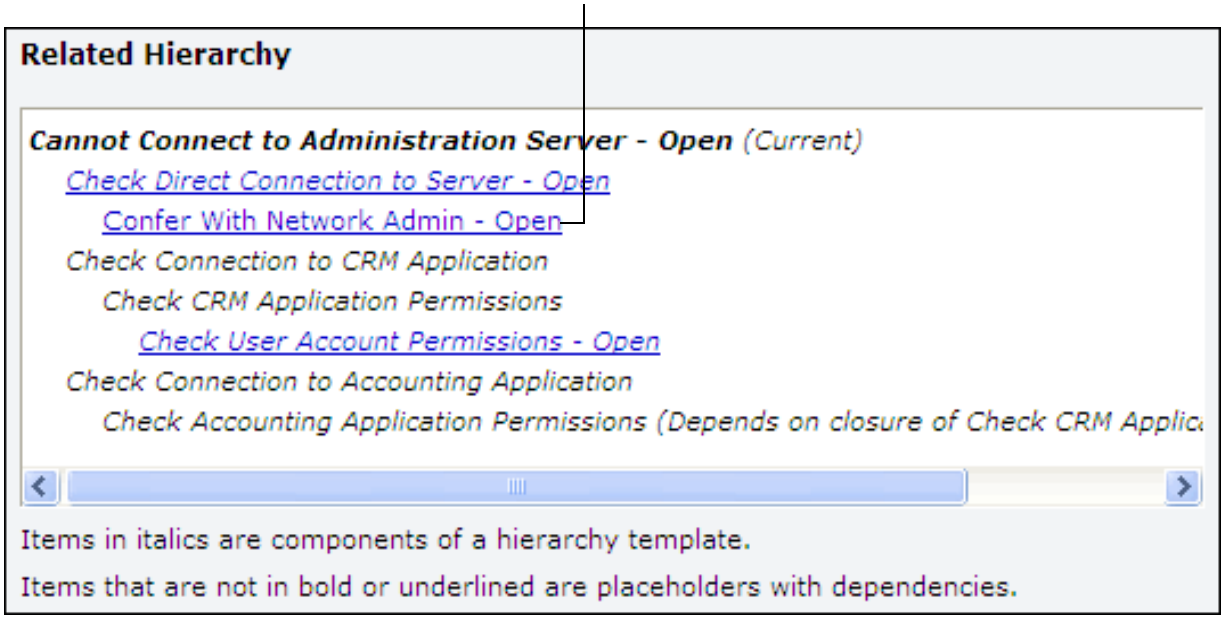


- Select Incident | Add to Hierarchy to add an existing incident.

Added to Cannot Connect to Administration Server top level incident using Incident | Add to Hierarchy



Added to Check Direct Connection to Server lower level incident using Incident | Add to Hierarchy

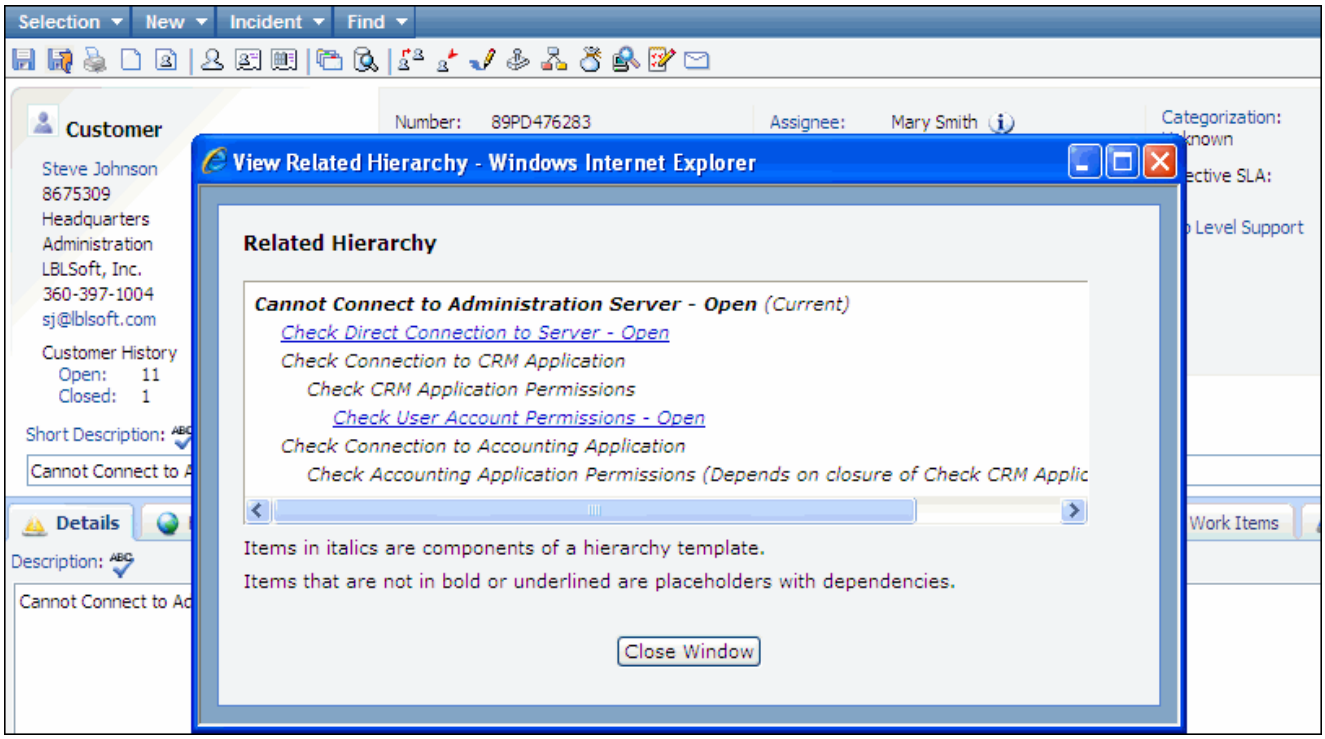


If the added existing incident contains lower level incidents, the structure is also added.

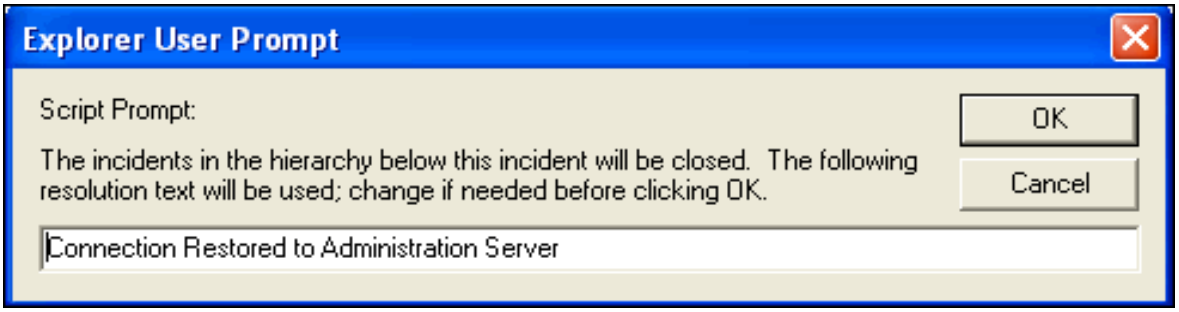
Closing Incidents in a Hierarchy Template Structure

Closing the Top Level Incident

If you close the top level incident in a hierarchy template structure, incidents in all levels underneath it must also close and incidents will not be created from template placeholders. In the example below:



In the Cannot Connect to Administration Server incident, the following dialog appears when you enter a resolution, select a closed status, and save the incident:



You can change the resolution that will be applied to the open lower level incidents before closure. If you select Cancel in this dialog, the top level incident will remain open.

After you select OK, the hierarchy is as follows:

Related Hierarchy

Cannot Connect to Administration Server - Closed *(Current)*
- *Check Direct Connection to Server - Closed*
- *Check CRM Application Permissions*
  - *Check User Account Permissions - Closed*
- *Check Accounting Application Permissions (Depends on closure of Check CRM Applicati*

Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

Closing Lower Level Incidents

When an incident in a hierarchy template structure is closed, incidents are created from templates that were dependent on closure of that incident. In the following example, after the Check User Account Permissions incident is closed, the Check CRM Application Permissions incident is created.

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*
- *Check Direct Connection to Server - Open*
- *Check Connection to CRM Application*
  - *Check CRM Application Permissions*
    - *Check User Account Permissions - Open*
- *Check Connection to Accounting Application*
  - *Check Accounting Application Permissions (Depends on closure of Check CRM Applic*

Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

After Check User Account Permissions incident is closed

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*
- *Check Direct Connection to Server - Open*
- *Check Connection to CRM Application*
  - *Check CRM Application Permissions - Open*
    - *Check User Account Permissions - Closed*
- *Check Connection to Accounting Application*
  - *Check Accounting Application Permissions (Depends on closure of Check CRM Applic*

Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

When the Check CRM Application Permissions incident is closed, an incident will be created from the Check Connection to CRM Application template. An incident will also be created from the Check Accounting Application Permissions template because the incident on which it was dependent is closed.

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*
- *Check Direct Connection to Server - Open*
- *Check Connection to CRM Application - Open*
  - *Check CRM Application Permissions - Closed*
    - *Check User Account Permissions - Closed*
- *Check Connection to Accounting Application*
  - *Check Accounting Application Permissions - Open* *(Depends on closure of Check CRM*

Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

When the Check Accounting Application Permissions incident is closed, the Check Connection to Accounting Application incident is created.

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*
- *Check Direct Connection to Server - Open*
- *Check Connection to CRM Application - Open*
  - *Check CRM Application Permissions - Closed*
    - *Check User Account Permissions - Closed*
- *Check Connection to Accounting Application*
  - *Check Accounting Application Permissions - Open* *(Depends on closure of Check CRM*

Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

When the Check Direct Connection to Server, Check Connection to CRM Application, and Check Accounting Application Permissions incidents are closed, the Cannot Connect to Administration Server incident can be closed.

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*

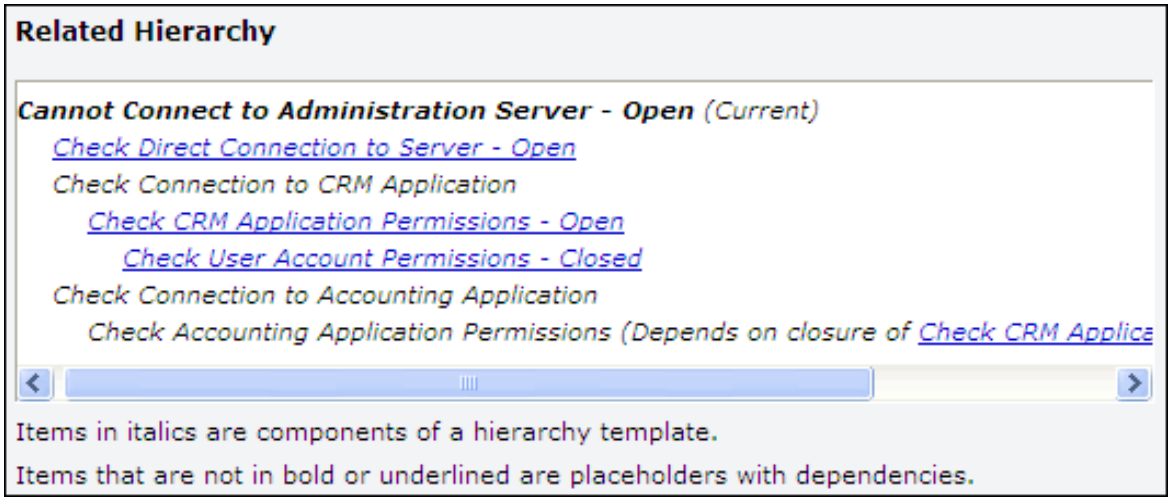
- *Check Direct Connection to Server - Closed*
- *Check Connection to CRM Application - Closed*
  - *Check CRM Application Permissions - Closed*
    - *Check User Account Permissions - Closed*
- *Check Connection to Accounting Application - Closed*
  - *Check Accounting Application Permissions - Closed*

Items in italics are components of a hierarchy template.

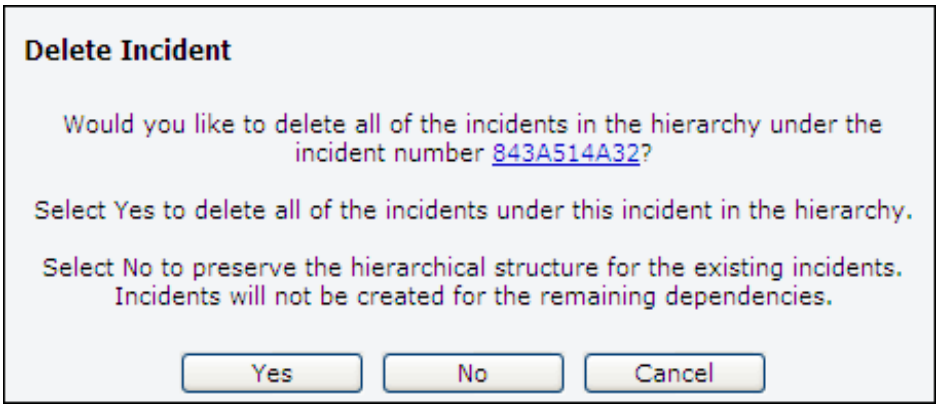
Items that are not in bold or underlined are placeholders with dependencies.

Deleting Lower Level Incidents in a Hierarchy Template Structure

If you delete an incident in a lower level of a hierarchy template structure, you have the option of deleting the incident's lower level incidents. Incidents will be created from template placeholders above it if dependencies are met. In the following example:



If you delete the Check CRM Application Permissions incident, the following appears:



- If you select No (you wish to retain its lower level incidents), the lower level incidents will go up a level. The structure will appear as follows; note that the Check User Account Permissions incident is now below the Check Connection to CRM Application incident.

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*
- *Check Direct Connection to Server - Open*
- *Check Connection to CRM Application - Open*
  - *Check User Account Permissions - Closed*
- *Check Connection to Accounting Application*
  - *Check Accounting Application Permissions - Open*

Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

- If you select Yes (you wish to delete its lower level incidents), the lower level incidents will be deleted. The structure will appear as follows.

Related Hierarchy

Cannot Connect to Administration Server - Open *(Current)*
- *Check Direct Connection to Server - Open*
- *Check Connection to CRM Application - Open*
- *Check Connection to Accounting Application*
  - *Check Accounting Application Permissions - Open*

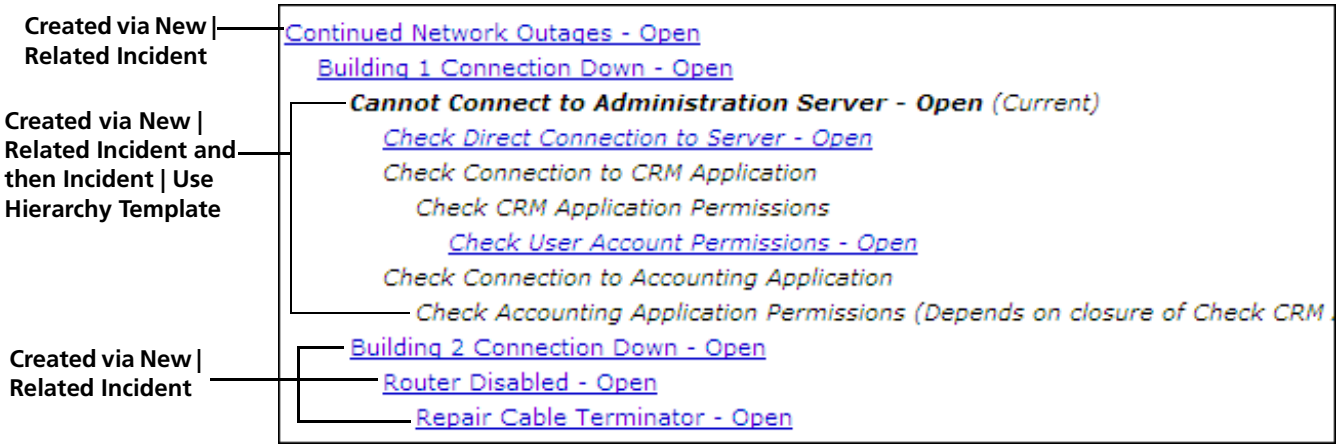
Items in italics are components of a hierarchy template.

Items that are not in bold or underlined are placeholders with dependencies.

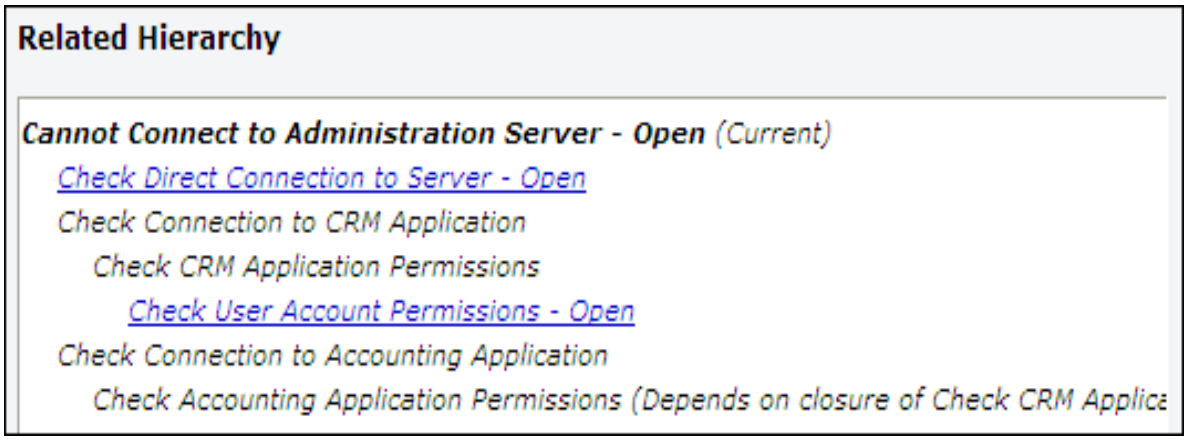
In both cases, an incident was created from the Check Connection to CRM Application template placeholder, which was above the deleted incident.

Removing and Deleting a Top Level Incident in a Hierarchy Template Structure

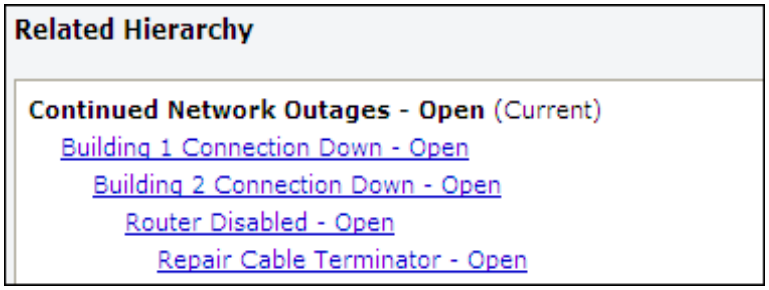
You can remove a top level incident and its hierarchy template structure from a larger hierarchy structure. In the following example:



In the Cannot Connect to Administration Server incident, you can select Incident | Remove From Hierarchy | Current Incident and Dependent Hierarchy. The Cannot Connect to Administration Server incident and its lower levels will become a standalone structure as shown below:

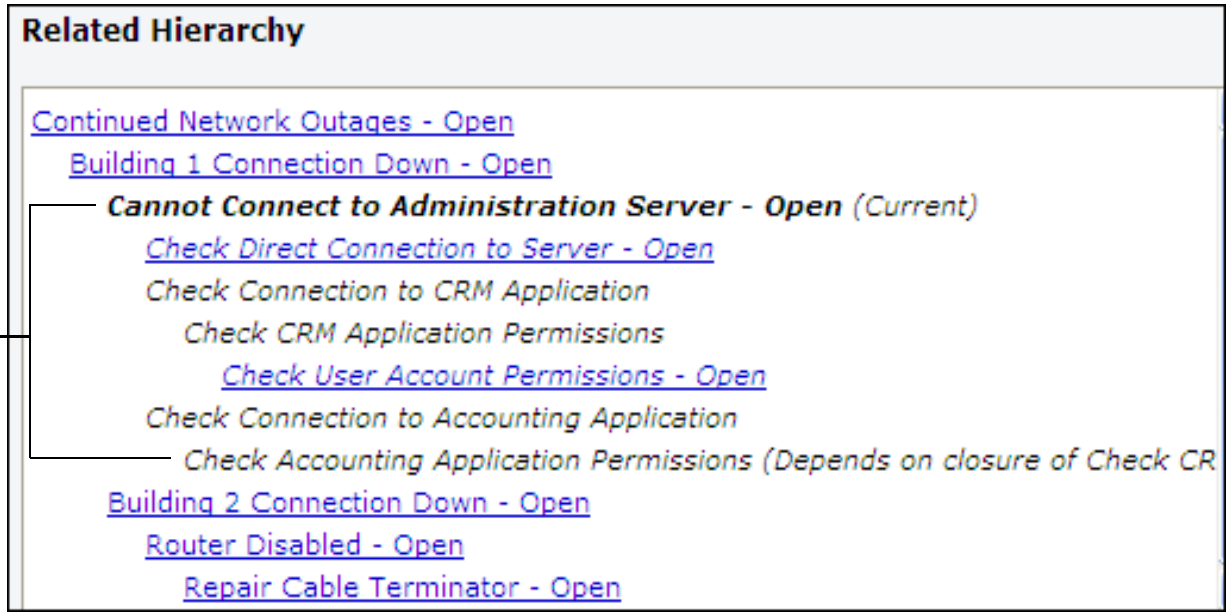


The rest of the structure would appear as follows:

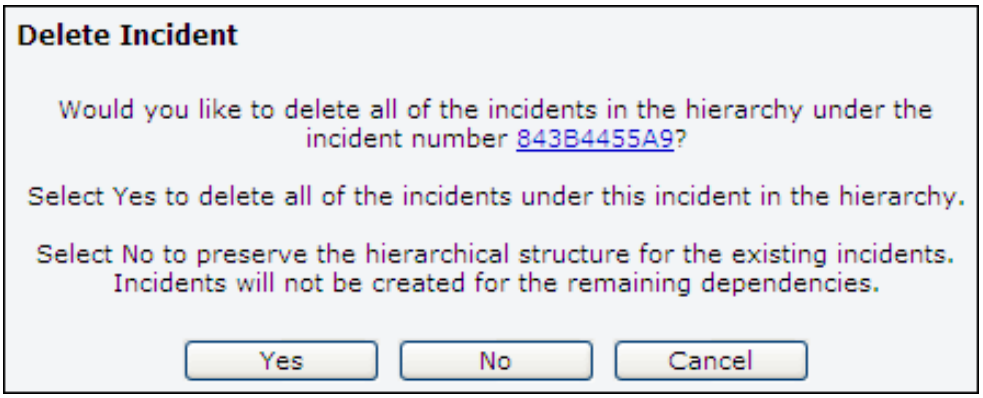


Deleting a Top-Level Incident in a Hierarchy Template Structure

When you delete a top level incident in a hierarchy template, you'll have the option of retaining its lower level incidents. In the example below:



If you delete the Cannot Connect to Administration Server incident, the following prompt appears:

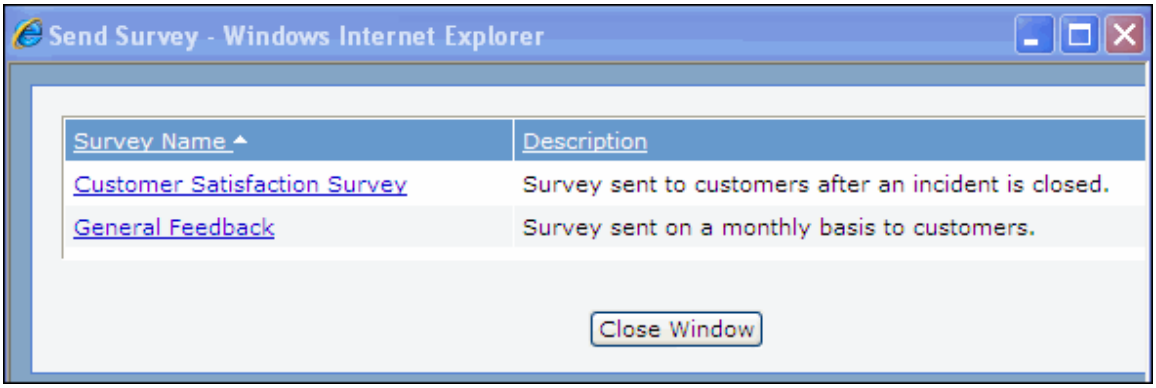


If you select No, the structure would appear as follows.

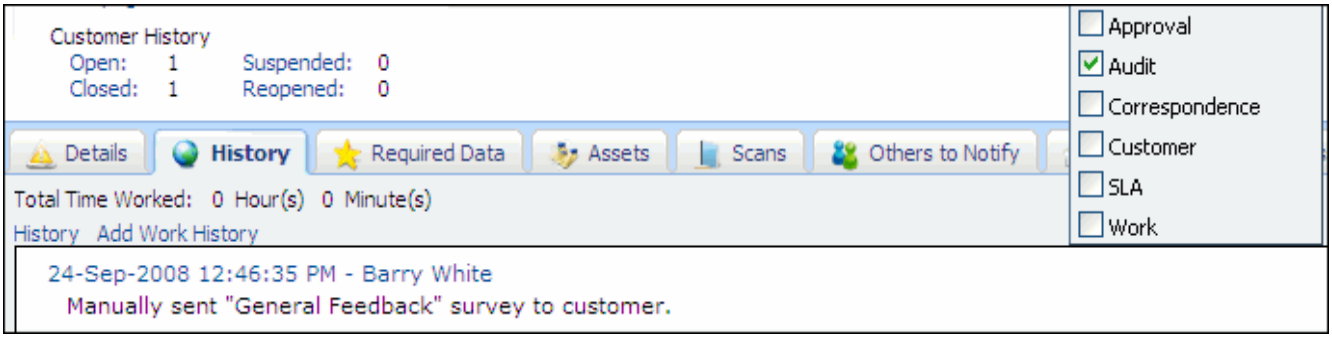
Sending a Survey

If iSupport's Survey functionality is enabled, you can send survey questionnaires to the customers assigned to the incident. Surveys are defined in the Configuration module, and if configured, surveys can be sent automatically on an interval basis.

To send a survey, select New | Survey or click the Send Survey icon. The Select Survey dialog appears:



After selecting a survey, the survey is sent and a notation appears on the History tab as shown in the example below:



You can send surveys to multiple customers via the Desktop. If you have sufficient permissions, you can view survey responses on the Desktop.

Printing Incidents

To print saved incident data, select Print from the Selection menu. Select the fields to include in the printout and click Continue. Click the Print link to print the selected fields.

Using Bomgar Chat and Remote Control Functionality

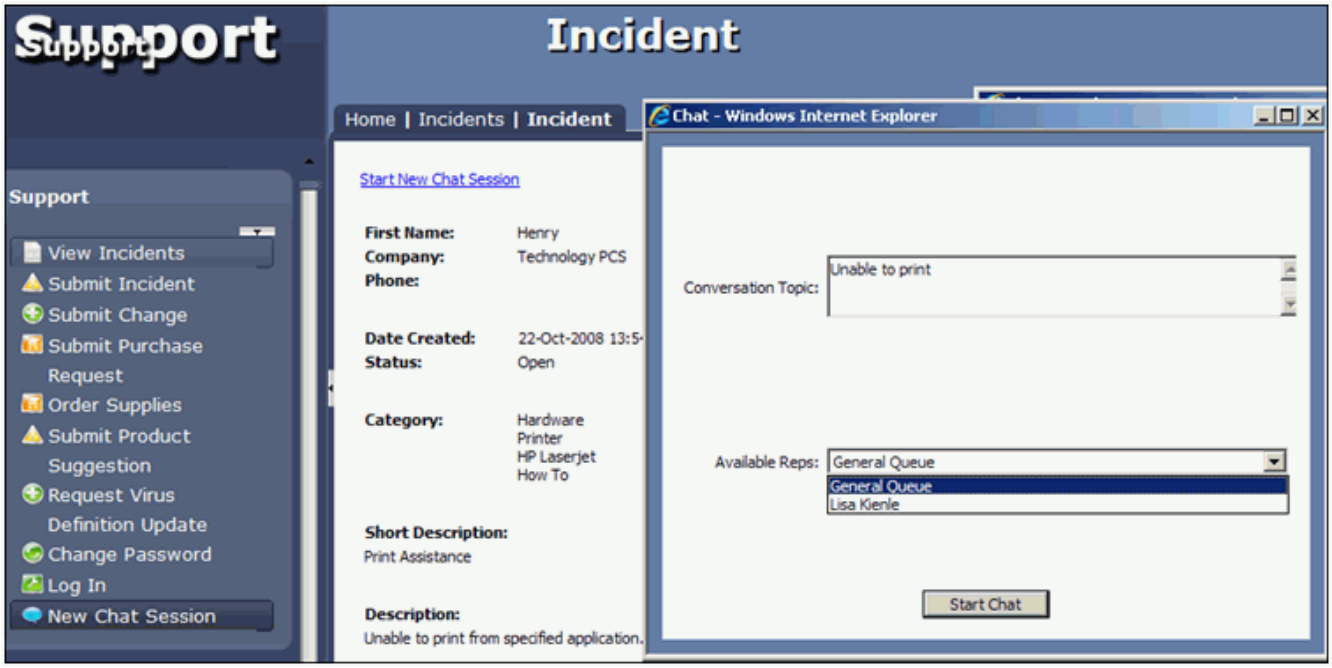
iSupport integrates with Bomgar software for remote desktop connection and chatting. The minimum Bomgar API version required is 1.4.2. Support representatives chat and access desktops remotely via the Bomgar Representative Console; the Adobe Flash Player browser plugin 9.0.28 or higher is required in order for the customer to chat, and the customer must download and run the Bomgar Support Customer Client in order to use the remote desktop functionality.

Initiating a Chat Session

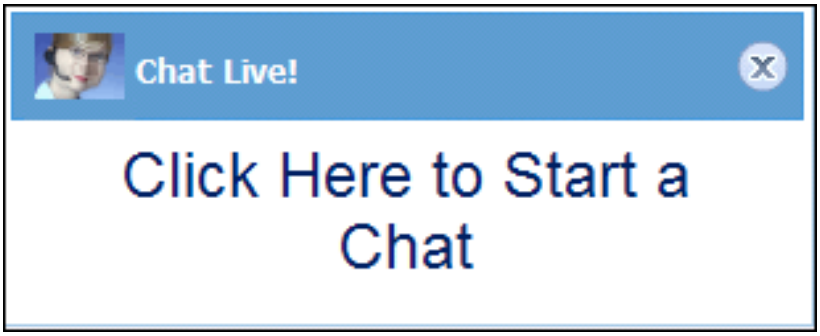
Starting a Session from the End User Desktop and Bomgar Support Portal

A customer can initiate a chat session from the End User Desktop (as described below), or by accessing the Bomgar Support Portal via URL.

- If configured, end users can start a chat from the New Chat Session link on a saved incident or the navigator on the End User Desktop. (If no support representatives are signed in to Bomgar, the Start New Chat Session link will not appear on the Incident screen; “No Reps Available” will appear if initiated from navigator.)



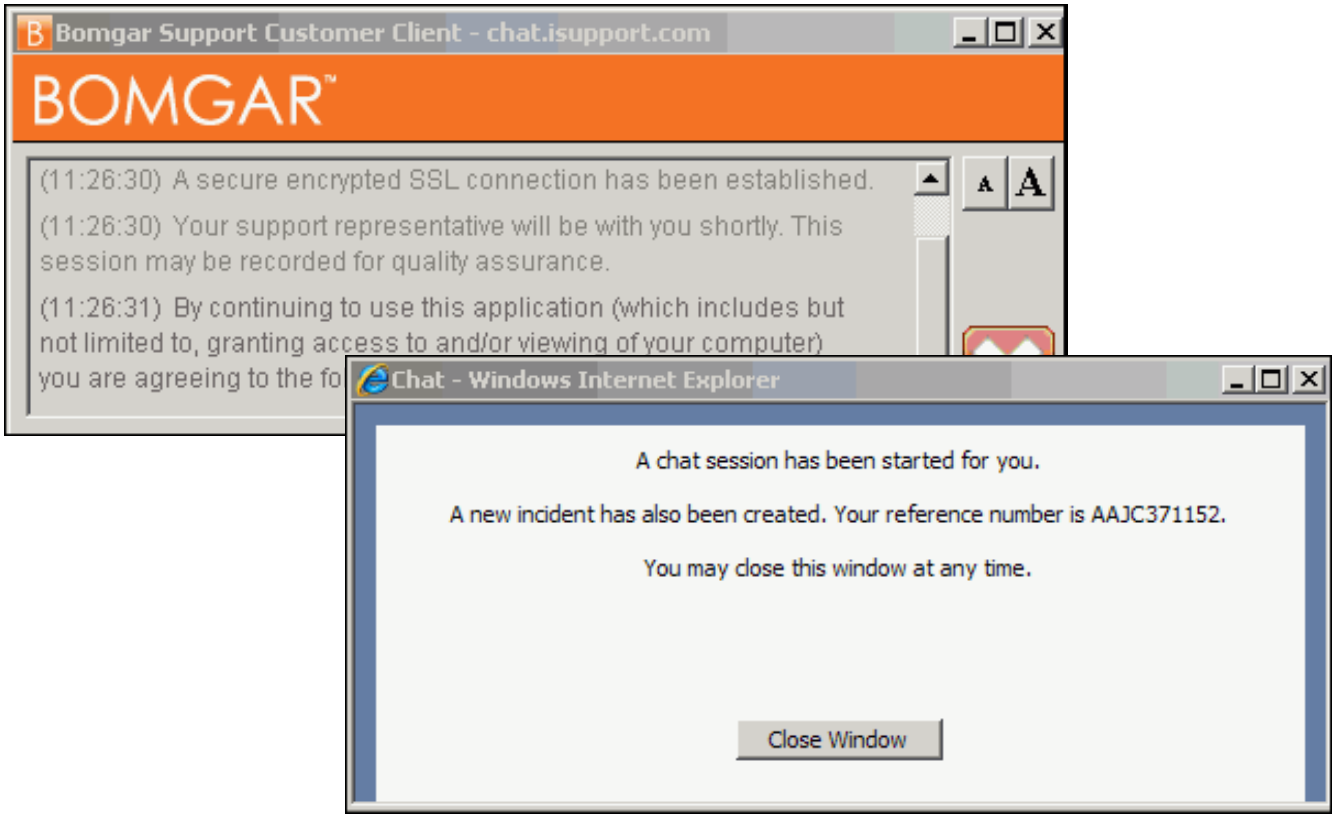
A customizable chat invitation window can also be configured to appear as shown in the example below.



- You can give customers the URL to the configured Bomgar Support Portal for initiating a session. This enables customers to enter a session key, select an available support representative, or submit an issue.

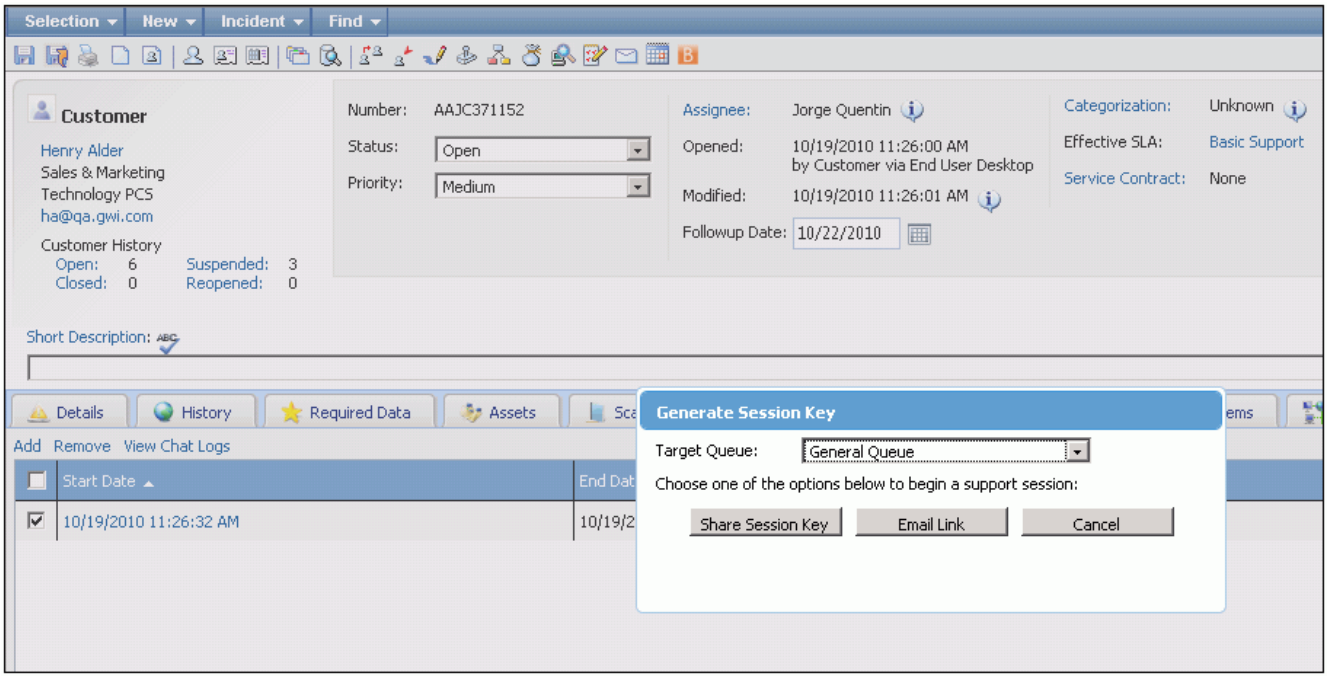
After initiating the chat, a dialog similar to the following will appear to the customer for downloading the necessary applications:

The Bomgar Support Customer Client download process will begin and the following dialogs will appear to the customer, indicating that a support representative has started a chat session. A new incident may be created if configured.

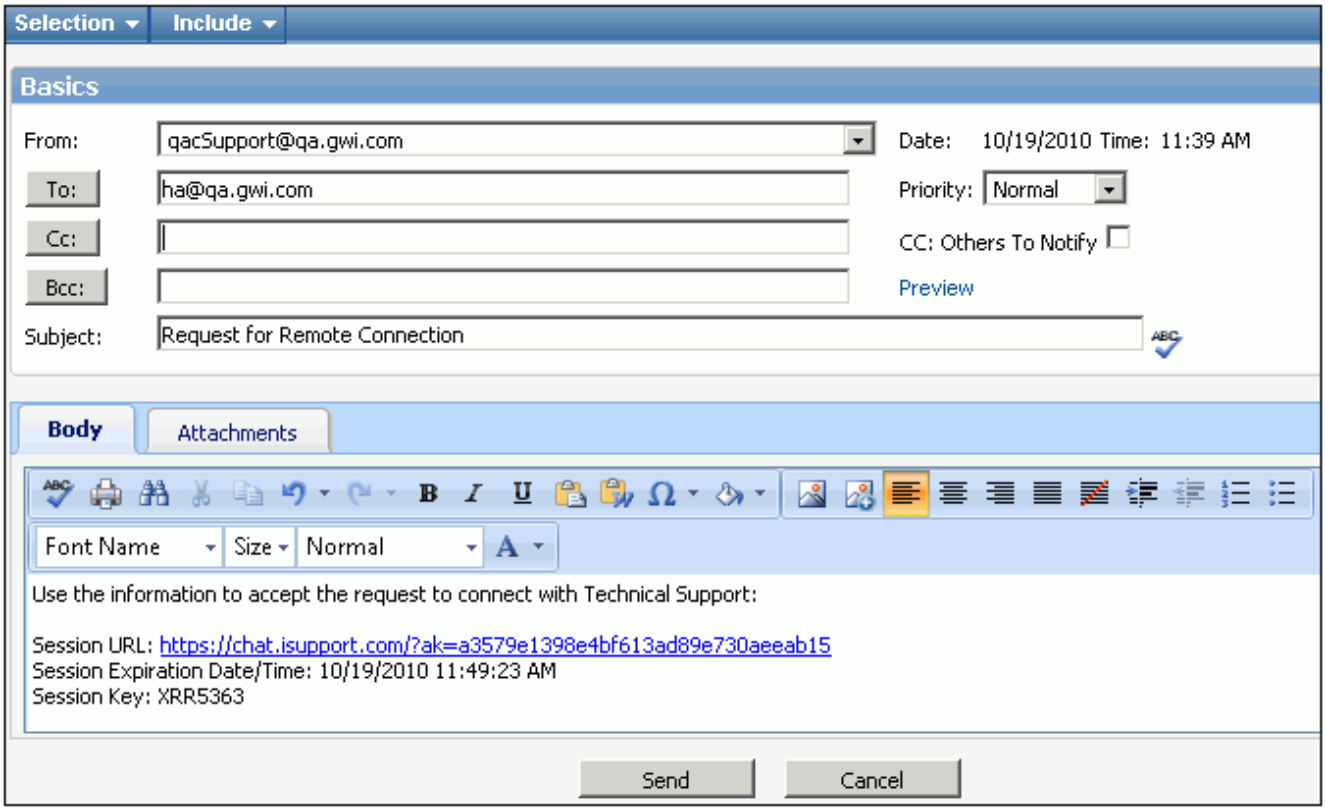


Starting a Session from the Incident Screen

If Bomgar integration is configured, the New Bomgar Session icon will appear for saved records in the Incident screen. It will display the Generate Session Key dialog with options for giving the session key to the customer.



Click the Email Link button to send the session key in an email; this email is configurable in the iSupport Bomgar Integration Basics screen.

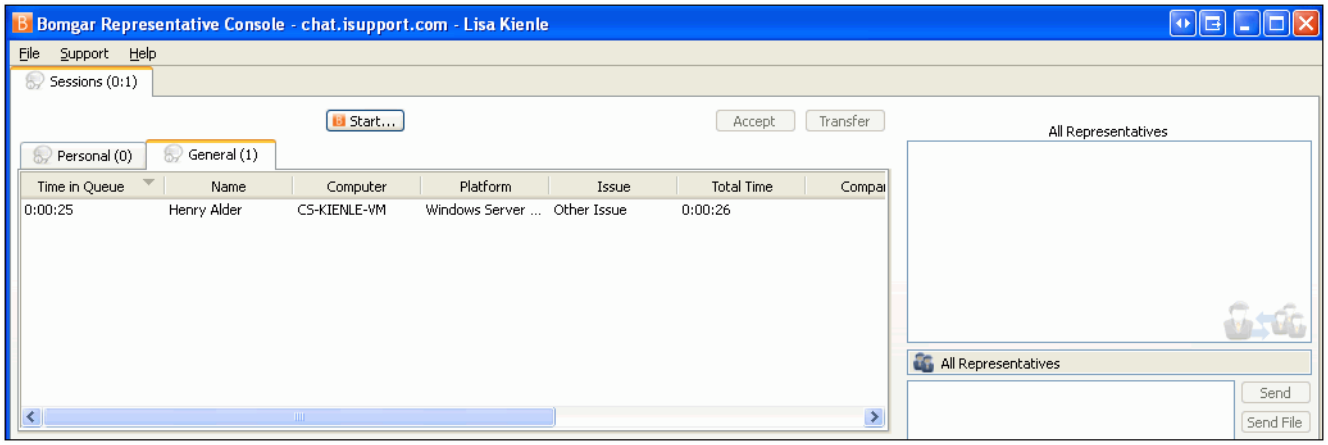


Click on Share Session Key to display the session key as shown in the example below for informing the customer:

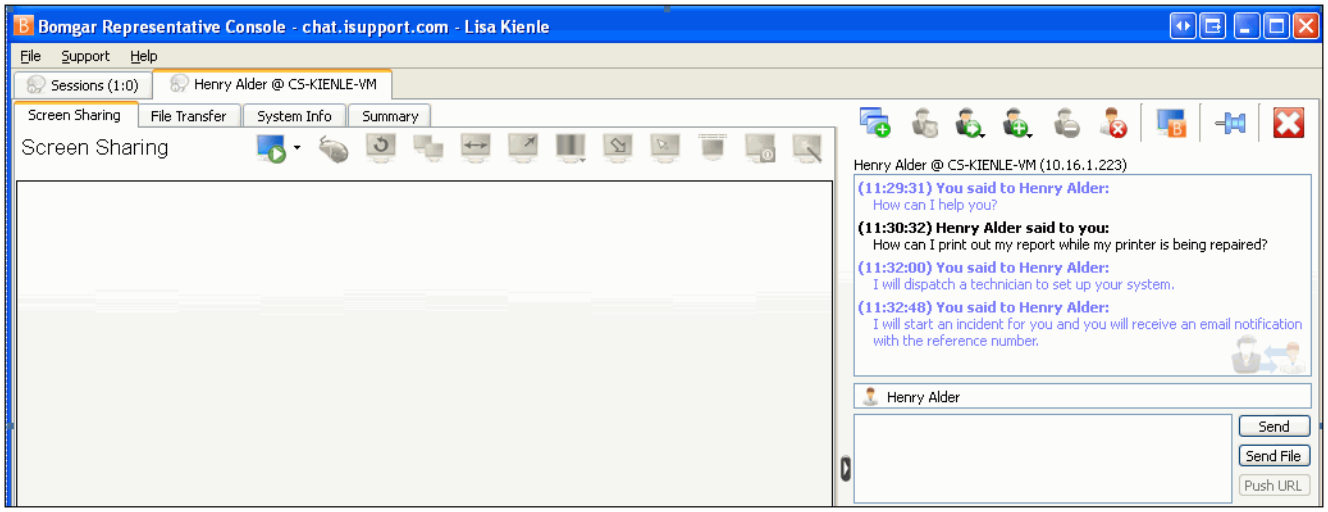
Using the Bomgar Console

On the Bomgar Representative Console, the Chat icon on the General tab will flash if General Queue is selected by the customer via the Chat dialog on the End User Desktop or Bomgar Support

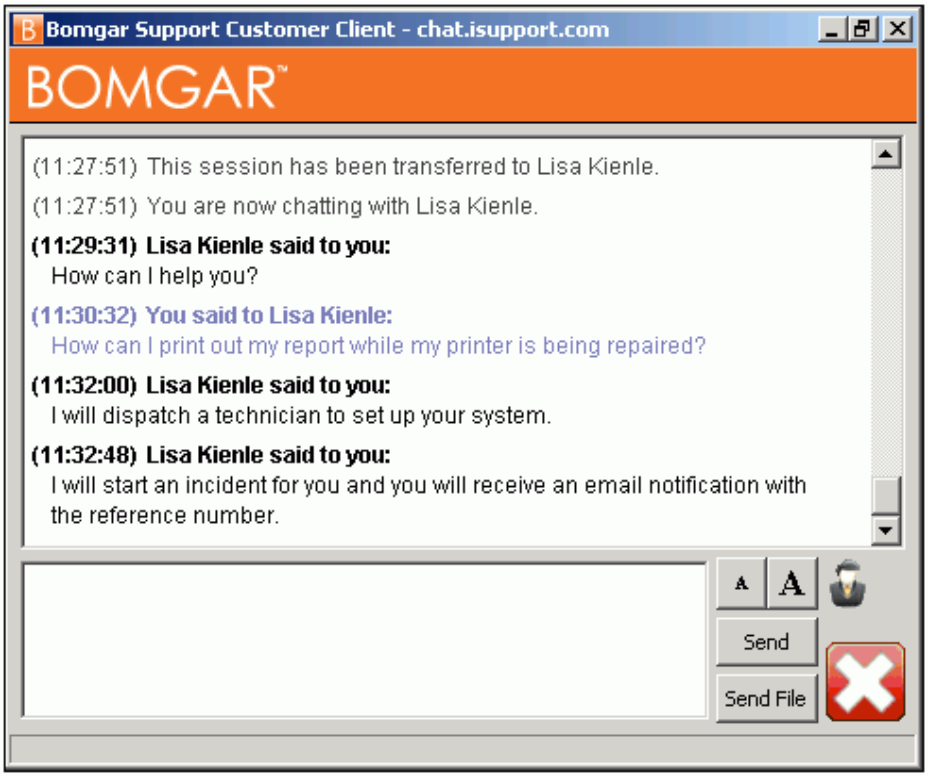
Portal. You can click on the customer's name to activate the session. If your name had been selected by the customer, the Chat icon would flash on the Personal tab.



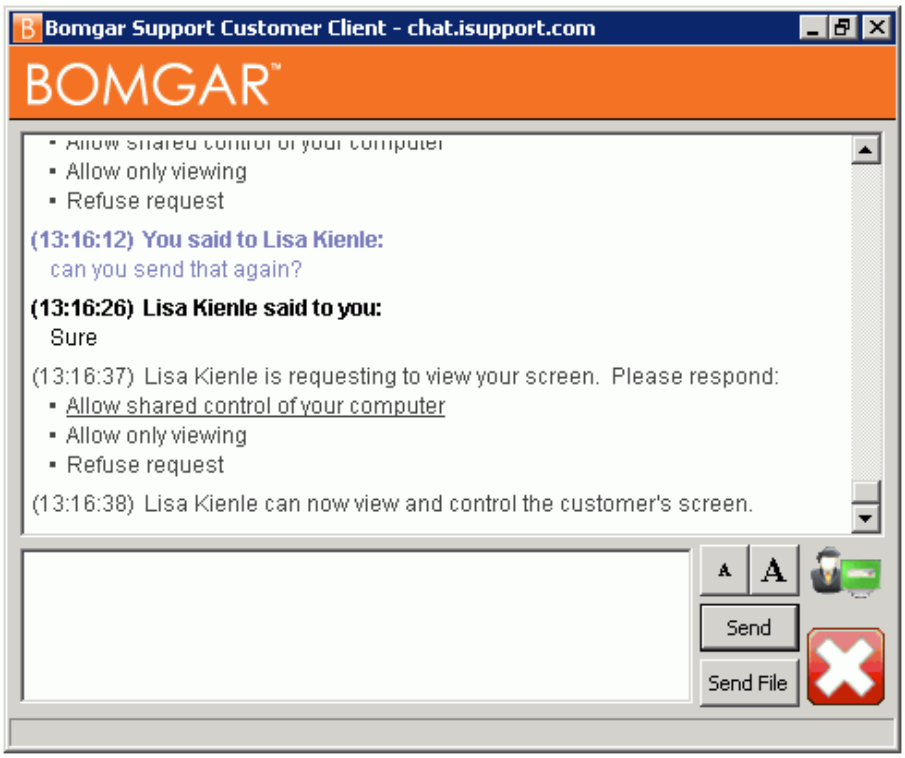
Use the text boxes on the right side of the Bomgar Representative Console to chat with the customer.



The chat will appear to the customer as shown in the example below.

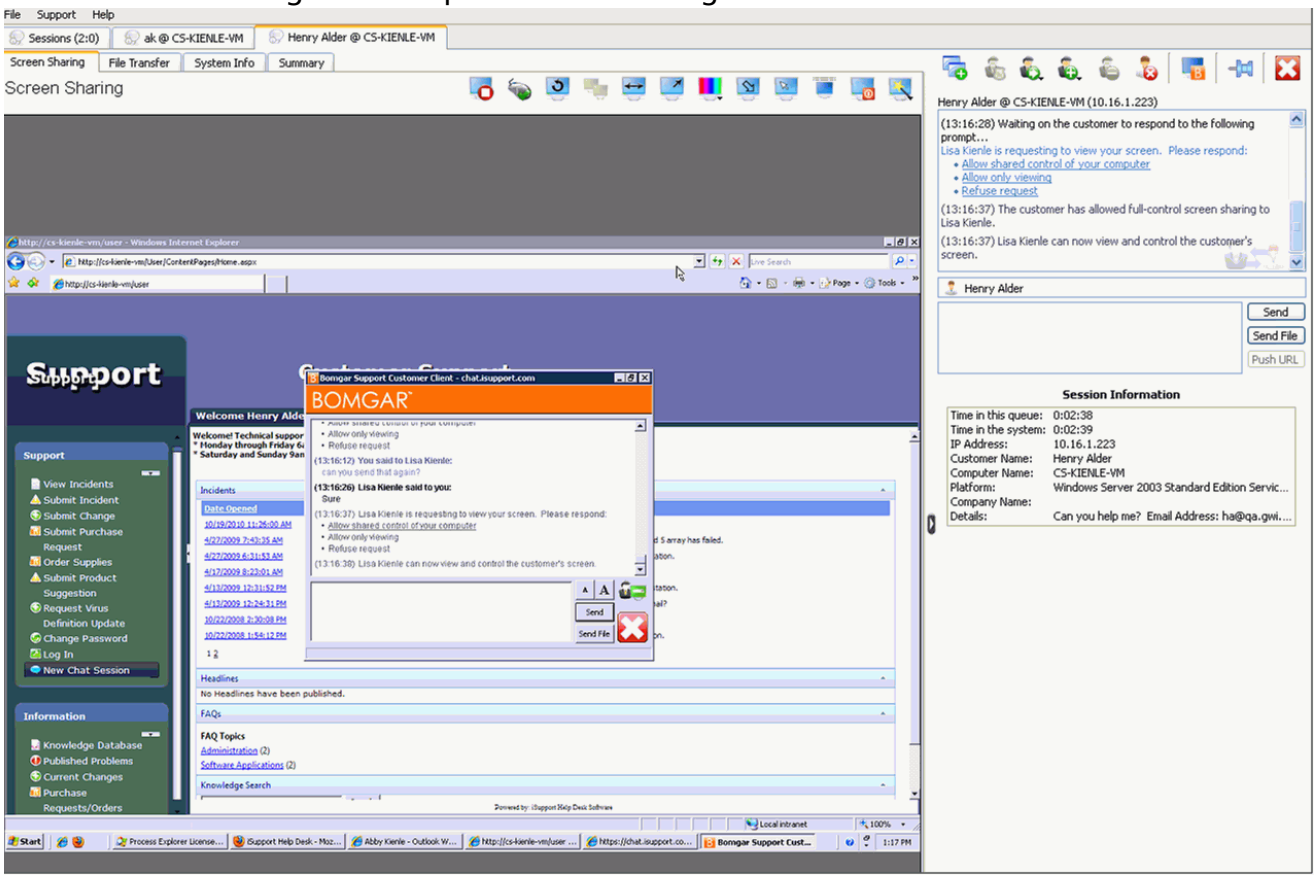


Click the icon on the Screen Sharing tab to remotely access the customer's screen. A request will appear on the Customer Client as shown in the example below.

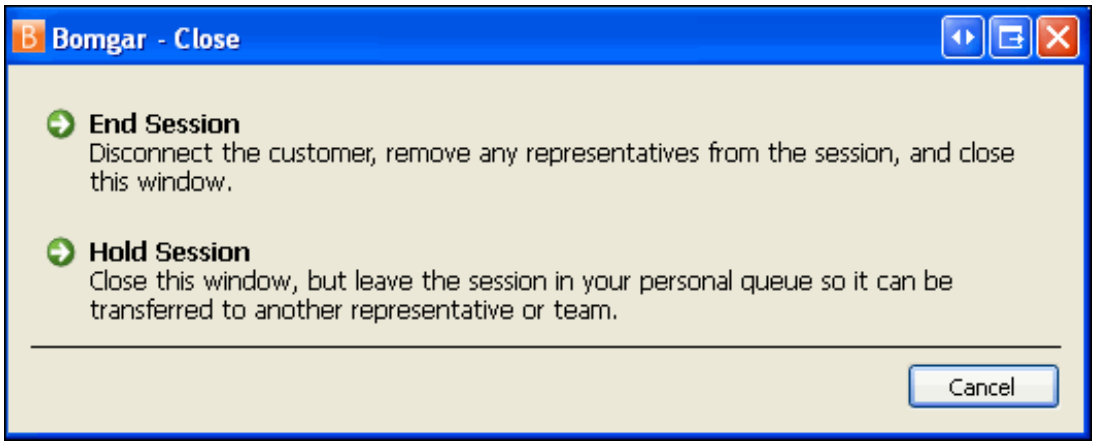


After the customer clicks the Allow Shared Control of Your Computer link, the customer's screen will appear on the Screen Sharing tab as shown in the example below. The System Info tab on the

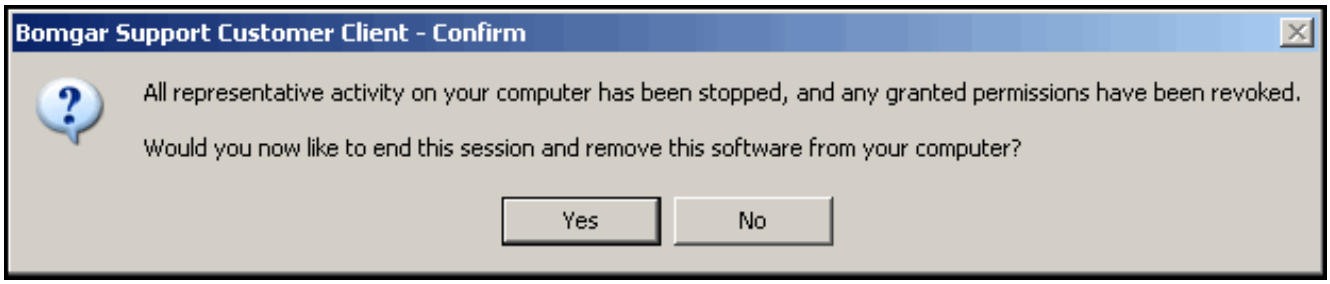
Representative Console includes information on the customer's system. You can click the icon on the Screen Sharing tab to stop the screen sharing session.



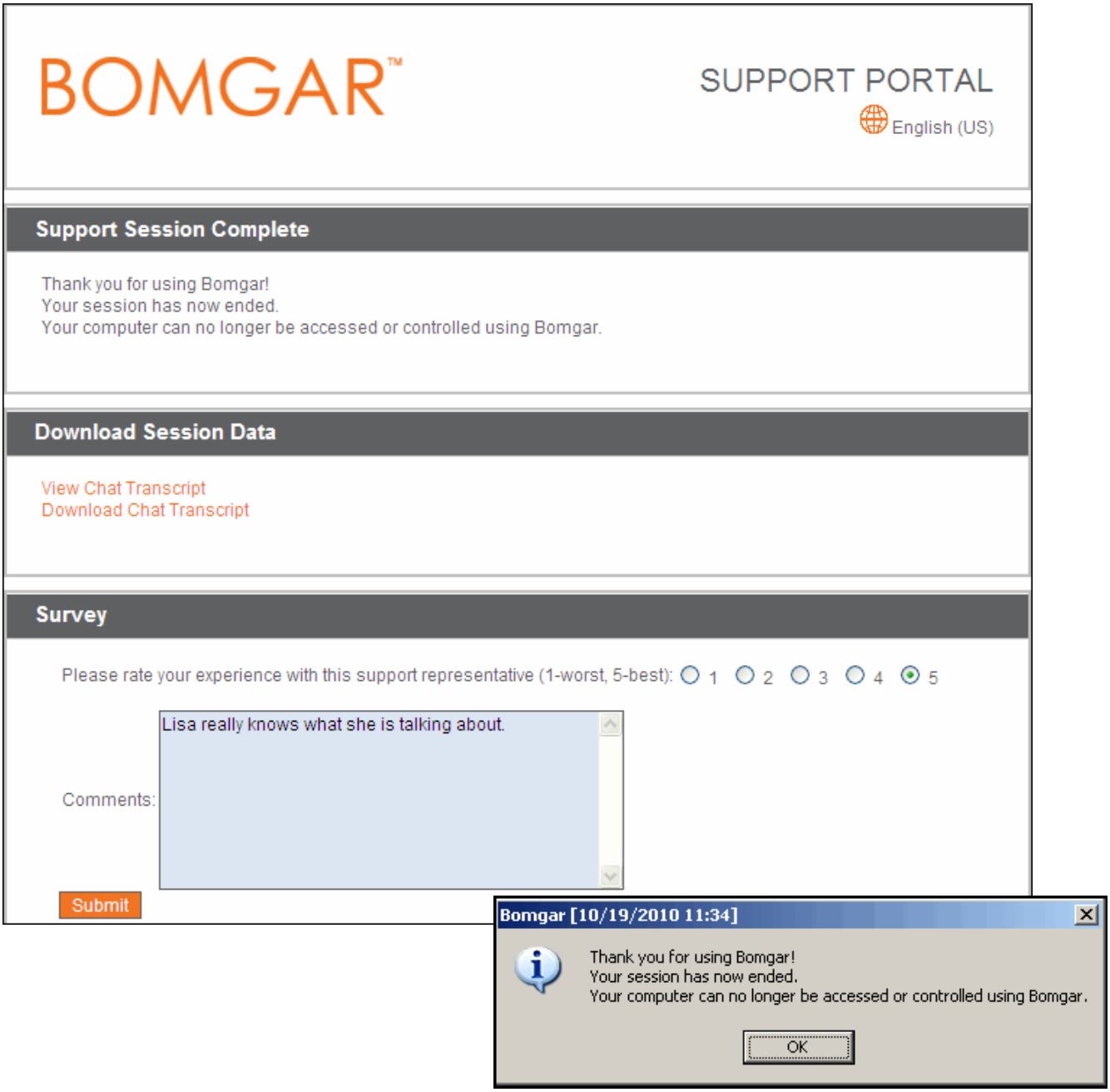
The customer or support representative can end the active session by clicking the Close icon. The following dialog will appear for the support representative to either end the session or hold it in their personal queue.



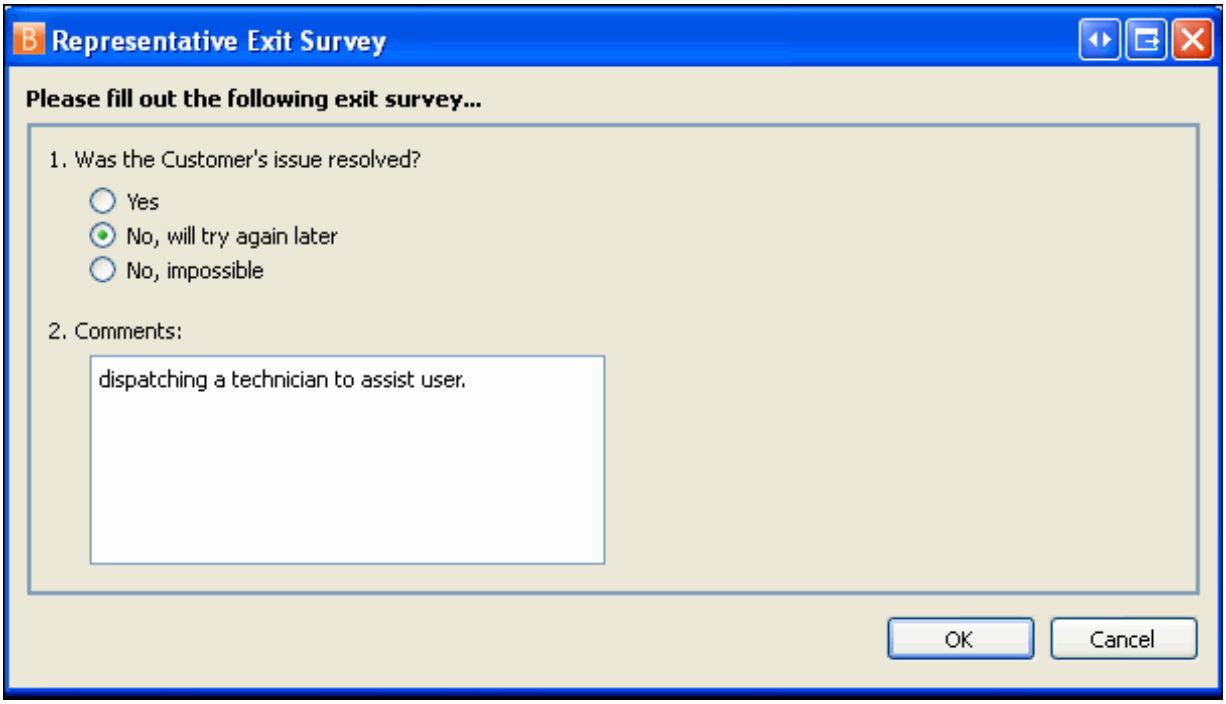
When the session has ended, the following will appear to the customer and the Bomgar Support Customer Client uninstall process will begin after Yes is selected.



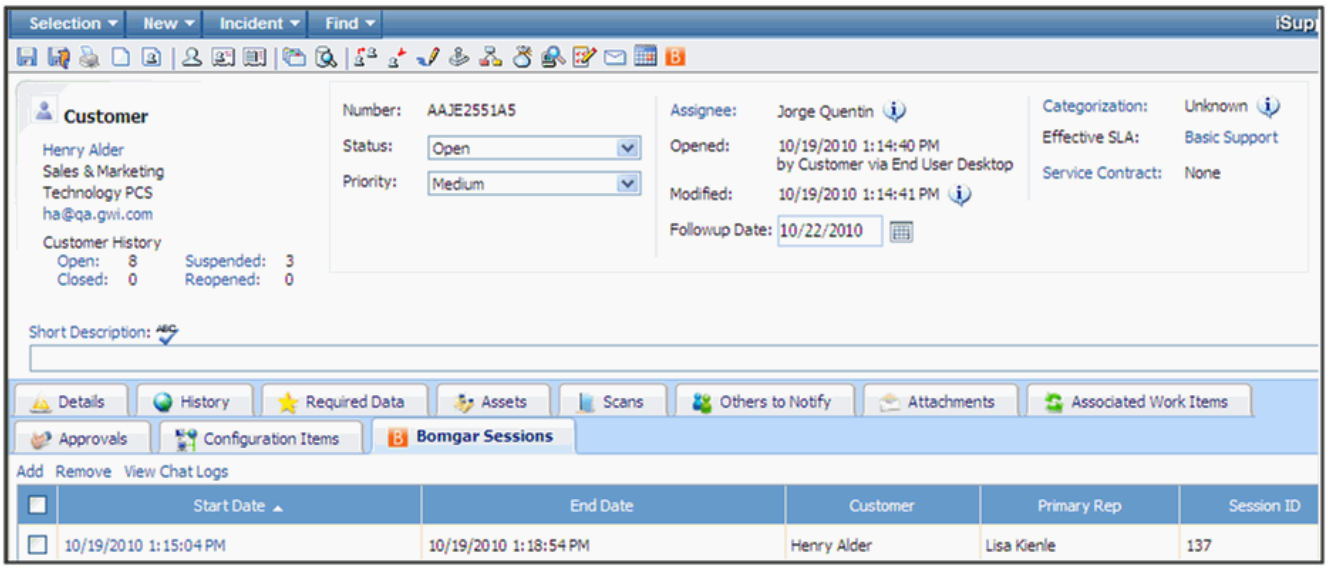
An Exit Survey will appear to the customer if customer exit surveys have been configured:



If configured, the Representative Exit Survey dialog will appear. The incident may be configured to close automatically after completion; the closure status can be automatically applied. The incident may also be configured to close if a specified value is selected on a survey question.



If configured, session data can be automatically included on the Bomgar Sessions tab in the incident. Click on a session date/time in the Start Date column to display the details of the session. Session data can also be saved for viewing and addition to incidents via the Add link; use the View Chat Logs link to display text from the chat as well as Bomgar system messages. You can select the Hide Bomgar System Messages checkbox to display only the text from the chat.



Deleting Incidents

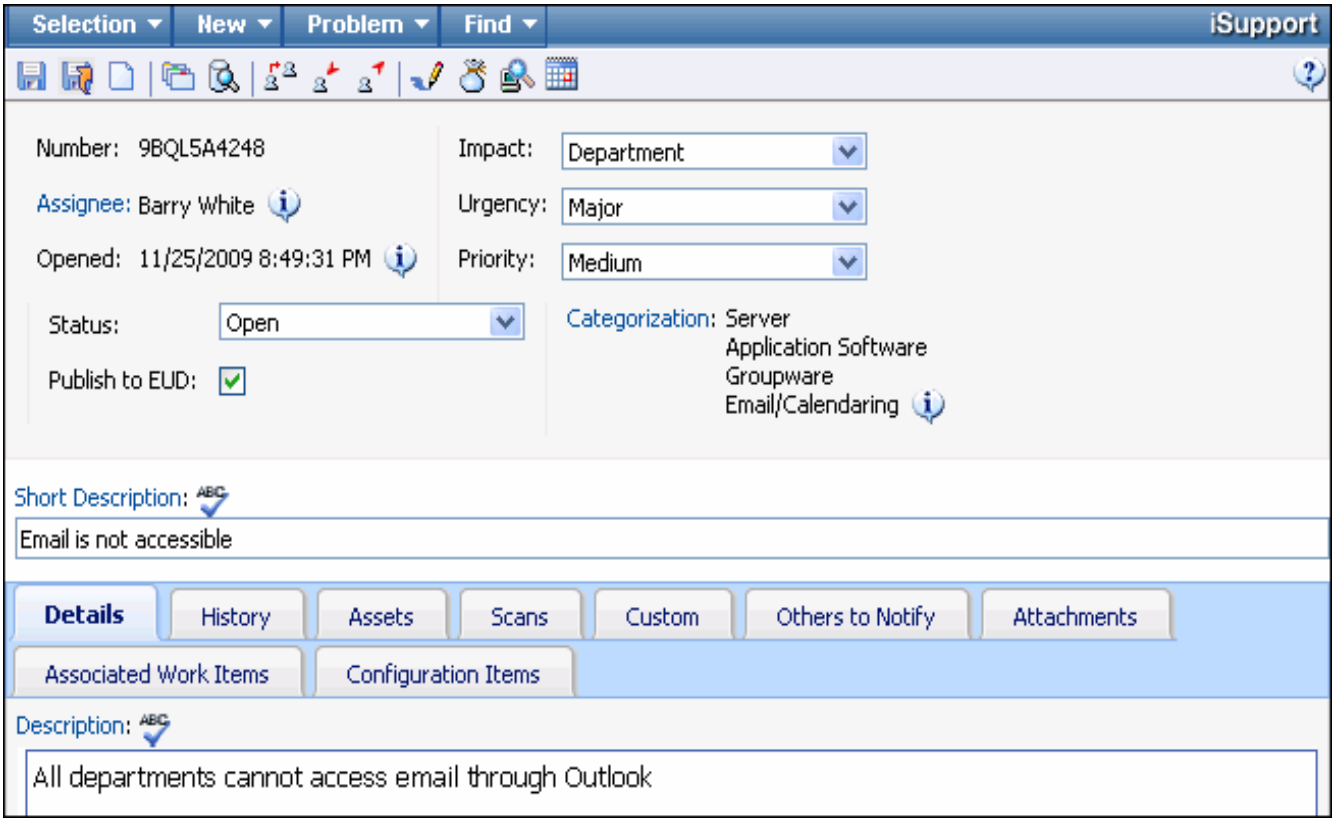
To delete an incident, select Delete from the Selection menu.

6 Working with Problem Records

Overview

Problem functionality is available if you have the Service Desk edition. Use Problem functionality to document and track the root cause of incidents. The Assignee, Description, Work History, Workaround, Root Cause, and Resolution fields track the process of troubleshooting the underlying issue until a resolution is discovered. Incidents, changes, purchase requests, and assets can be linked to a Problem record; if configured, associated incidents can be closed when a Problem record is closed.

Problem records can be published to the End User Desktop. When a workaround and/or root cause is entered in a Problem record, the Problem record is designated as a Known Error in reports and views on the Desktop and End User Desktop.



The *iSupport Administrator's Guide* contains information on setting up all Problem functionality.

Functionality may not be accessible if disabled or disallowed due to permissions set during configuration. This chapter contains information on **all** Problem functionality.

In This Chapter

This chapter contains the following on entering essential change information:

- "Categorizing the Problem" on page 266.
- "Entering Descriptive Information" on page 268.
- "Saving the Problem" on page 268.

You can also perform the following miscellaneous problem tasks while entering problem information:

- "Accessing Outlook Calendar" on page 283.
- "Selecting an Assignee" on page 270.
- "Selecting the Status, Impact, Urgency, and Priority" on page 274.
- "Publishing to the End User Desktop" on page 275.
- "Publishing to the End User Desktop" on page 275.
- "Entering the Workaround, Root Cause, and Resolution" on page 277.
- "Entering and Viewing History" on page 278.
- "Viewing History Entries" on page 280.
- "Specifying Others to Notify" on page 289.
- "Attaching Files" on page 290.
- "Associating Other Items" on page 290.
- "Sending an Email From a Problem Record" on page 291.
- "Searching From the Problem Screen" on page 295.

Entering Essential Problem Information

To create a Problem record, select Create | Problem on the Desktop action menu. The only information required in order for a Problem record to be saved is the categorization, short description, and any required custom fields. The resolution is also required in order for a Problem record to be closed.

Selection | New | Problem | Find | iSupport

Number: 9BQL693432
Assignee: Unassigned
Opened: 11/25/2009 8:58:23 PM
Impact: Department
Urgency: Major
Priority: Medium
Status: Open
Publish to EUD: ☑
Categorization: Server
Application Software
Groupware
Email/Calendaring

Short Description:
Email is not accessible

Details | History | Assets | Scans | Custom | Others to Notify | Attachments
Associated Work Items | Configuration Items

Description:
All departments cannot access email through Outlook

Workaround:

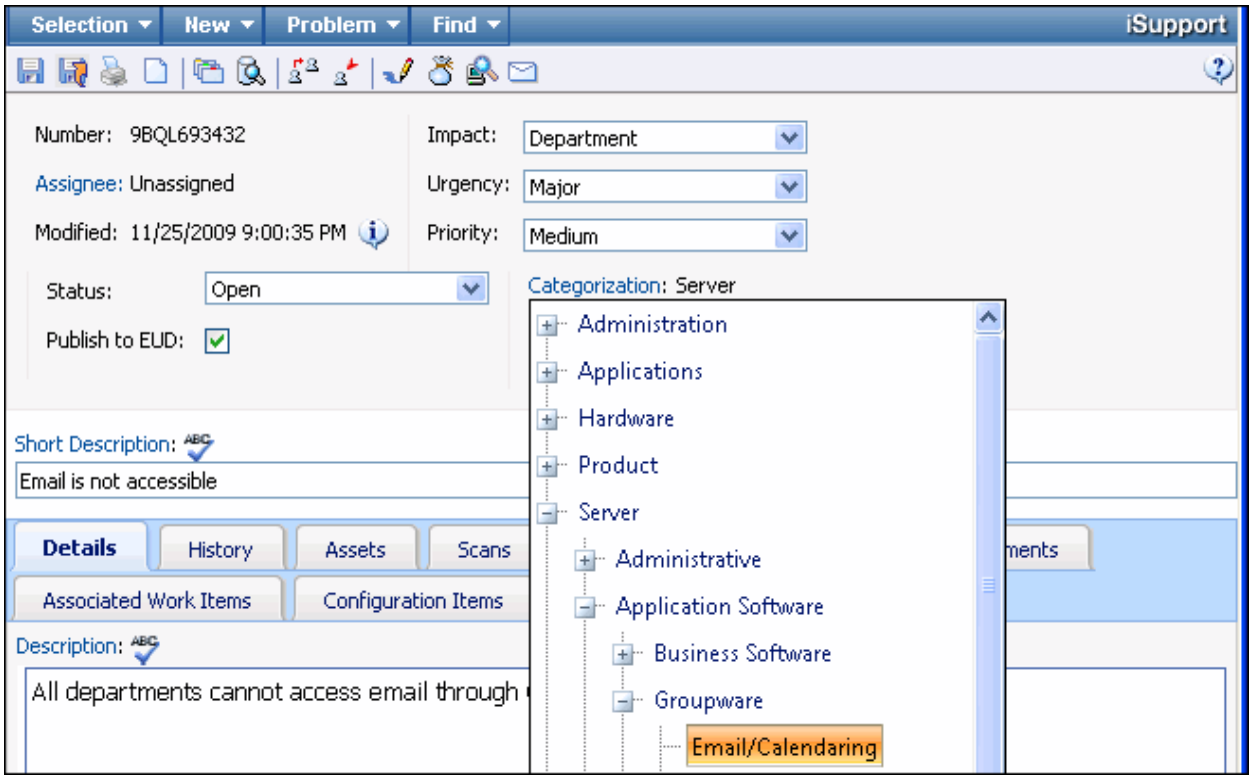
Root Cause:
Exchange mailbox store dismounted.

Resolution:
Mailbox store mounted, allowing system to respond to connection attempts.

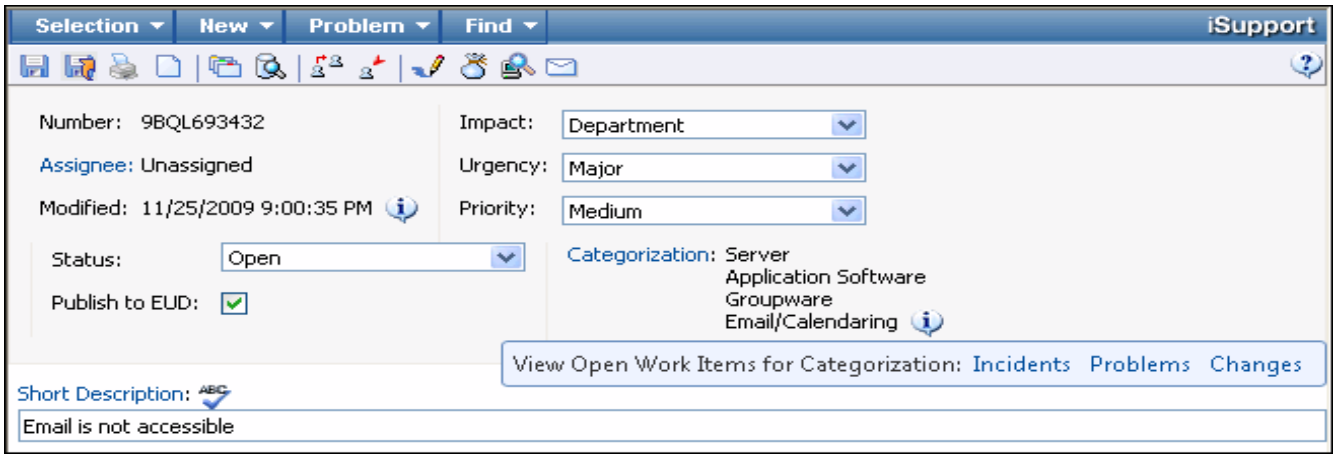
Categorizing the Problem

Categories are used for routing, reporting, incidents, Change records, and knowledge entries. Categories are enabled in sets of up to five levels; the first level is fairly general and the last level is fairly specific.

To select a category set, click the Categorize icon, select Problem | Categorize, or click the Categorization link on the Details tab. A dialog appears containing predefined categories; select the one that best describes the problem.



If there are other incidents, problems, or changes that have the same categorization, the View Open Work Items for Categorization field appears for you to view those records.

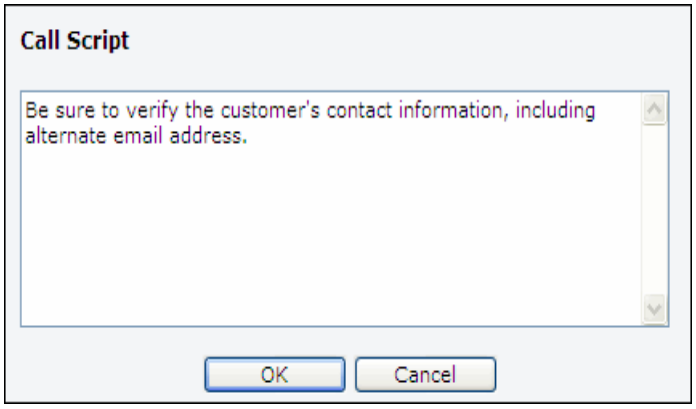


The items with a matching categorization will appear; you can click the number to open the record. You can associate new and existing incidents, changes, and purchase requests with a Problem record; a configuration option can be set to close the associated incidents when a Closed

status is selected for the problem. The Closed status assigned to the closed incidents can also be configured. See "Associating Other Items" on page 290 for more information.

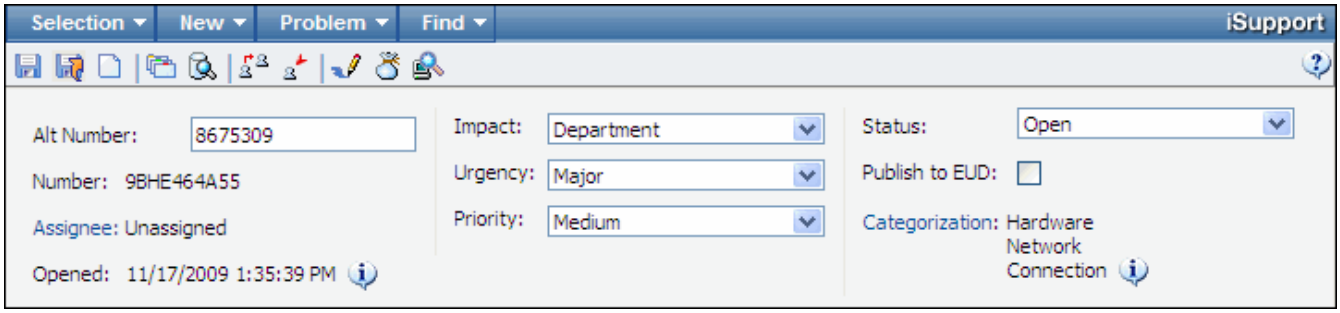
Completing Call Scripts

Call scripts are associated with specific category combinations and can contain instructions on gathering information, a list of questions to ask, or other related items. If a call script is associated with the selected category set, the script appears in a dialog when the category set is selected. Follow the script, enter responses to questions if applicable, and click OK.



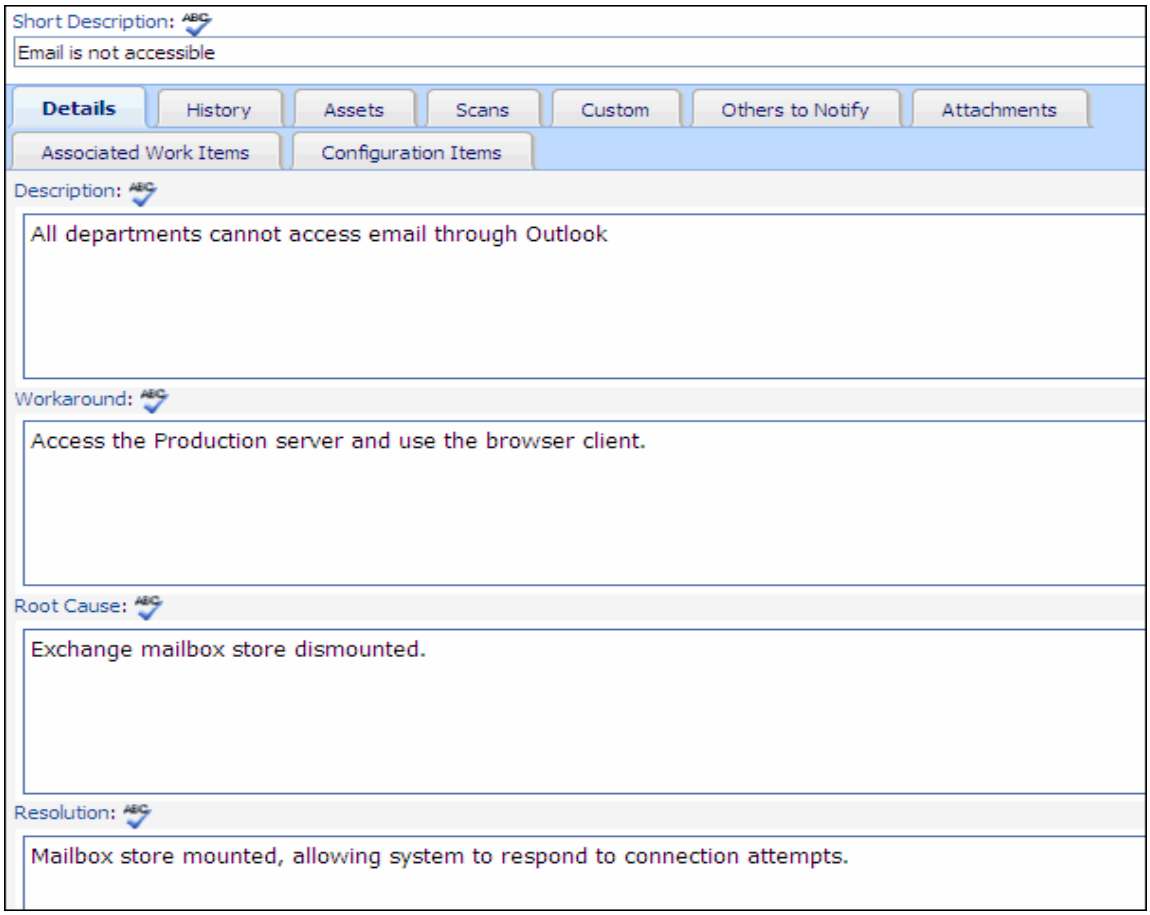
Entering a Custom Number

A unique number is assigned to each Problem record; a custom number field may also be configured to appear above the Number field ("Alt Number" in the example below). This number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. The field may be read-only after you enter the number and save the record.



Entering Descriptive Information

Use the Short Description and Description fields to enter details regarding the problem.



If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Description, Workaround, Root Cause, and Resolution fields; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

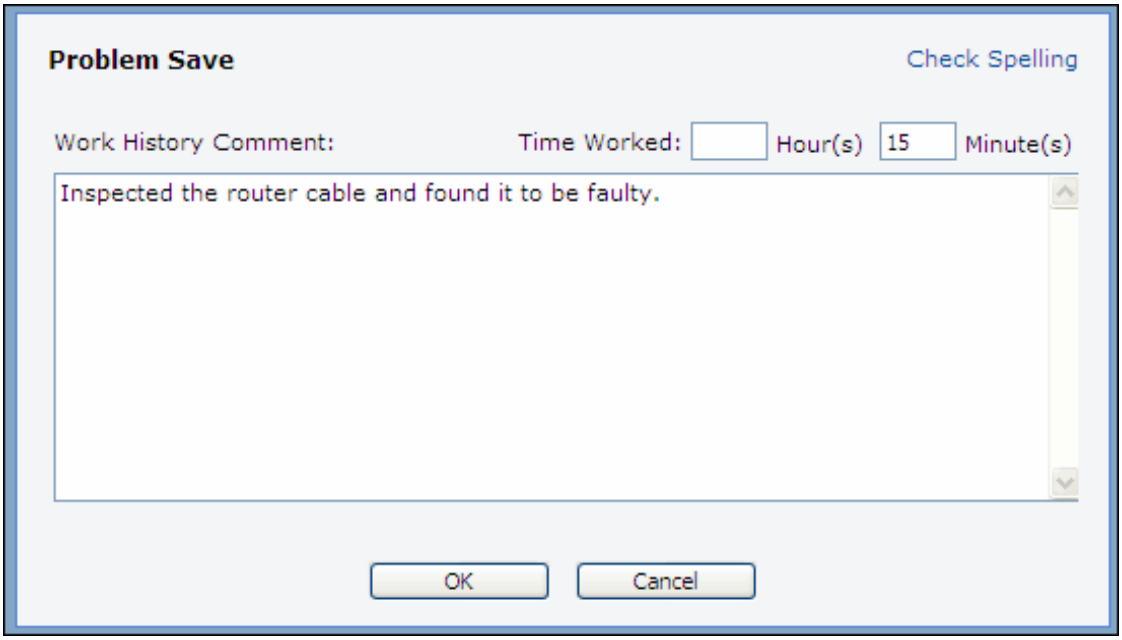
When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Saving the Problem

Do one of the following:

- To save a problem without closing the window, select Save from the Selection menu, press Ctrl+S, or click the Save icon.
- To save the problem and close the window automatically after completing the Problem Save dialog, select Save and Close from the Selection menu or click the Save and Close icon on the toolbar.

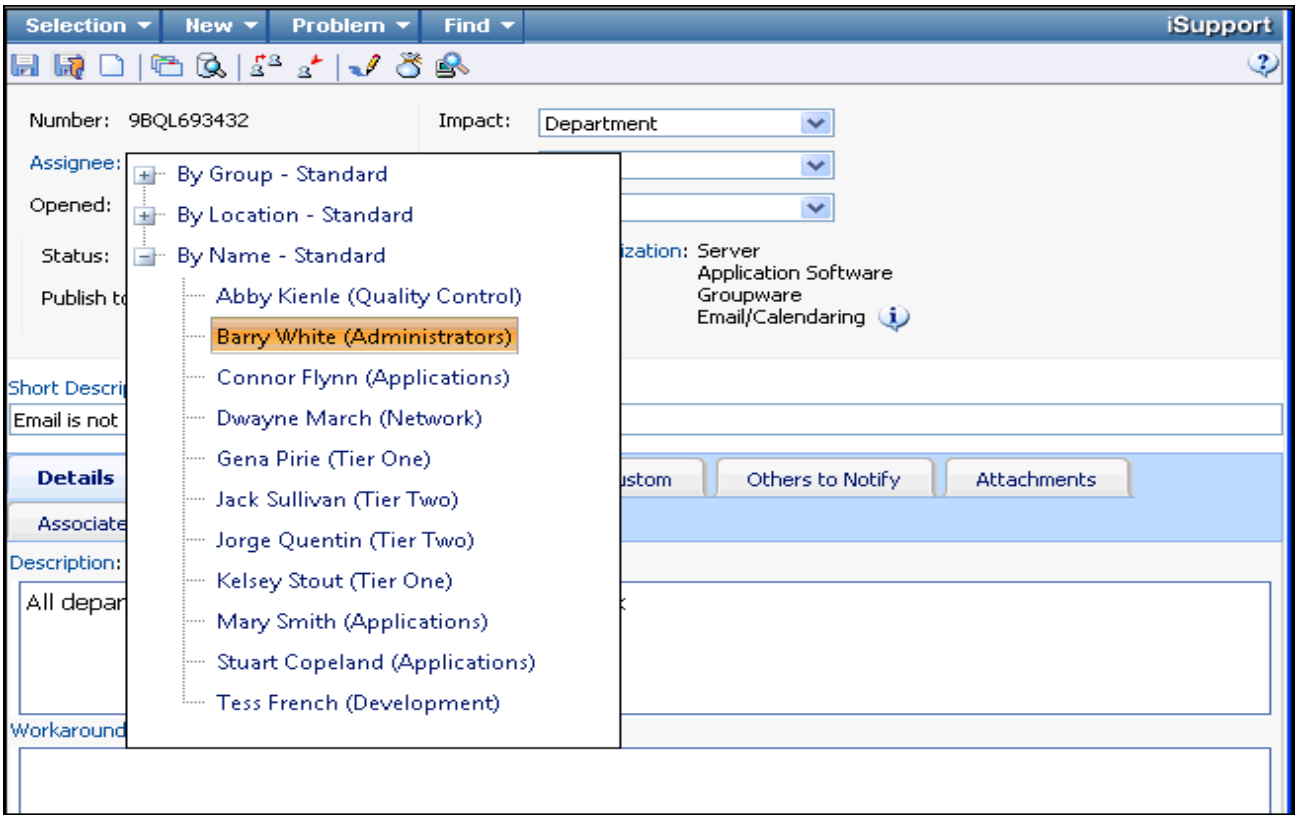
If configured, the Problem Save dialog appears:



If applicable, enter the hours and minutes you worked on the problem in the Time Worked field and enter information on any activities related to the change in the Work History Comment field. (You can also enter this information on the History tab.)

Selecting an Assignee

Click the Assignee link to select the support representative to assign to the problem.



There are several methods of routing; some or all of these methods of routing may be available to you depending upon configuration settings.

- **Group Based/Standard:** A list of groups appears; when you select a group, a list of support representatives in the group appears for selection. (These groups are set up in Support Representative records.)
- **Group Based/Load Balanced:** The support representative with the lightest workload in a group is selected.
- **Location Based/Standard:** A list of all available support representatives in a selected location appears.
- **Location Based/Load Balanced:** The support representative with the lightest workload within a location is selected.
- **Name Based/Standard:** A list of all available support representatives appears.
- **Name Based/Load Balanced:** The support representative with the lightest workload is selected.
- **Skill Based/Standard:** A dialog will display listing the category levels selected for the problem; select the level of categorization that exactly matches the categorization for which support representative skills should be searched. For example, if the problem categorization is Hardware/Printers/Laser:

- If you select Printers, those support representatives with a categorization of Hardware/Printers in their Support Representative record would be displayed for selection.
- If you select Laser, those support representatives with a categorization of Hardware/Printers/Laser in their Support Representative record would be selected.

- **Skill Based/Load Balanced:** After you select the level of categorization for which support representative skills should be searched, a support representative is selected based on the workload of the support representatives who have the exact match of the selected categorization in their Support Representative record.
- **Location by Skill/Standard:** A dialog will display listing support representative locations; after selecting a location, a dialog will display listing the category levels selected for the problem. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representatives in the selected location with matching skills are listed for selection.
- **Location by Skill/Load Balanced**: A dialog will display listing support representative locations; after selecting a location, a dialog will display listing the category levels selected for the problem. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative in the selected location with matching skills and the lightest workload is selected.

Load balanced routing involves weights based on priority; these weights are set up during configuration.

If a support representative has worked with a problem and the problem is reassigned, he/she will be bypassed until all available support representatives with the skill or in the group or location (depending on the method selected) have worked with the problem.

If you selected **skill based standard routing**, the categories selected for the problem appear; select the level for which associated support representative skills should be searched. Support representatives with skills/categories in their Support Representative records that *exactly match that categorization level* will display for selection.

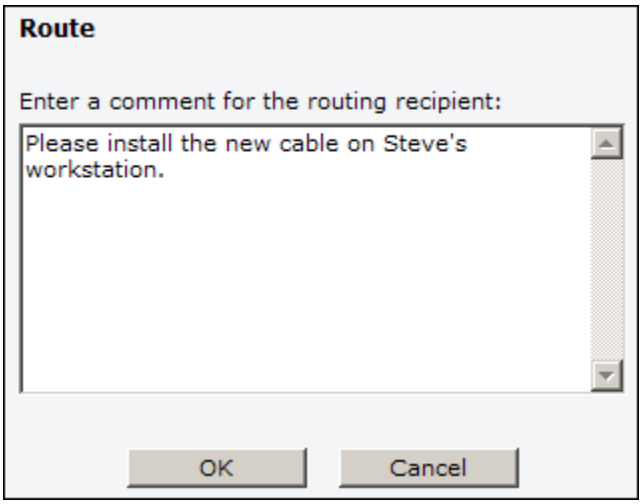
If you selected a method with **load balanced routing**, the name of the person calculated to have the lightest workload will appear. Click Back to re-select routing options or Finish to assign the support representative.

Routing to Yourself

To route a problem to yourself (for example, if problems are first routed to a queue), click the Route to Self icon. This bypasses routing dialogs. If you are not a member of the current assignee's group, your primary group will be used. If you wish to change your group, you'll need to use the Change Assignee's Group option or the routing dialogs (via the Route icon or Assignee link).

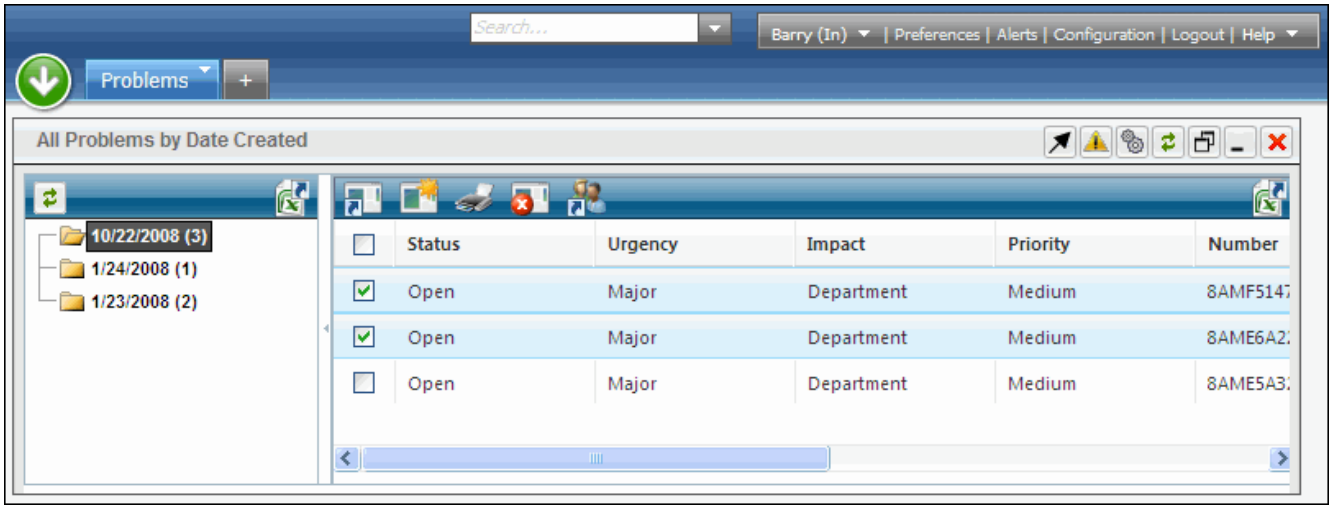
Entering Routing Comments

Once you click Finish, if routing notifications are enabled in configuration for reassignment, the Routing Comment dialog appears for you to enter a note to be included in the notification email to be sent to the new assignee. The note will be on the first line of the email.



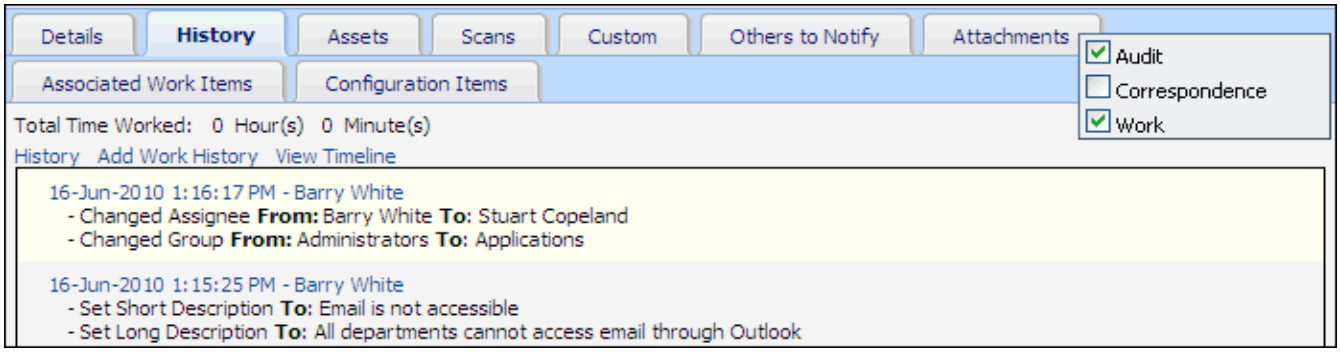
Routing Multiple Problem Records via the Desktop

You can route a problem with an Open status from a view on the Desktop. Select the problems to route and then click the Route icon. The routing dialogs will appear as in the Problem screen, except the skill-based routing and location by skill based routing methods will not be available. If load balanced routing is used, the selected Problem records will be distributed evenly to the available support representatives in the selected group, location, or all (if using name-based routing). The same comment will be applied to all routed problems.



Viewing Routing Information

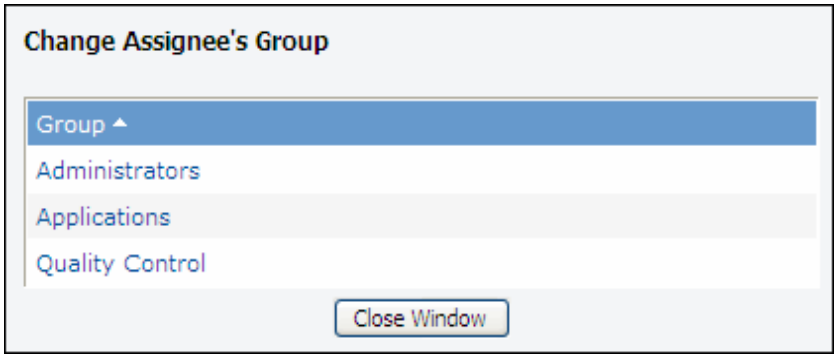
The Audit History entries on the History tab include the date and time of the route.



To view the assignee's contact information, skills, and groups, click the View Rep Details link after clicking the icon next to the Assignee field.

Changing an Assignee's Group

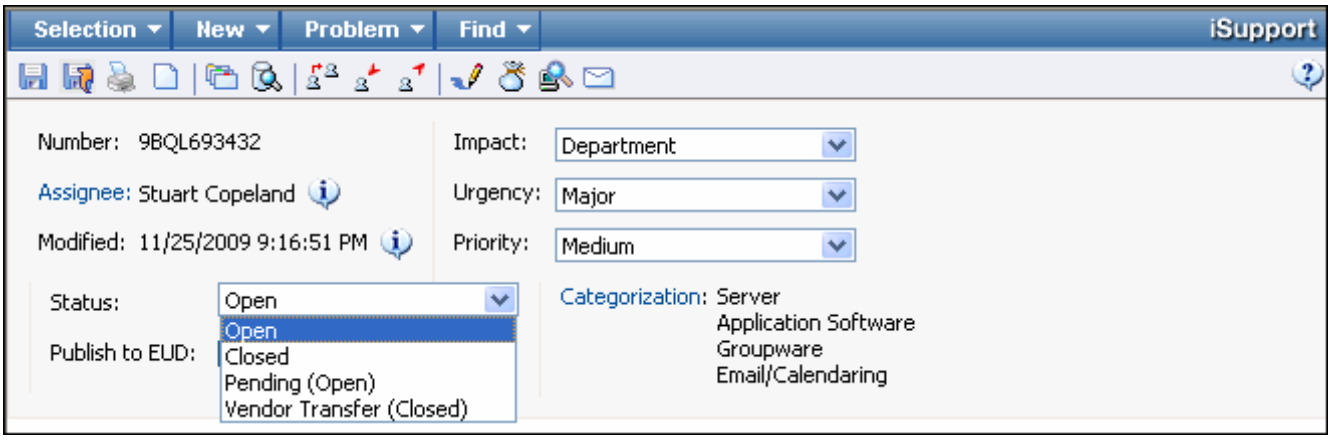
If an assignee is a member of more than one group, you can select Problem | Change Assignee's Group to change the assignee's group membership for a problem. Click on the appropriate group in the Select Group dialog.



Selecting the Status, Impact, Urgency, and Priority

Selecting the Problem Status

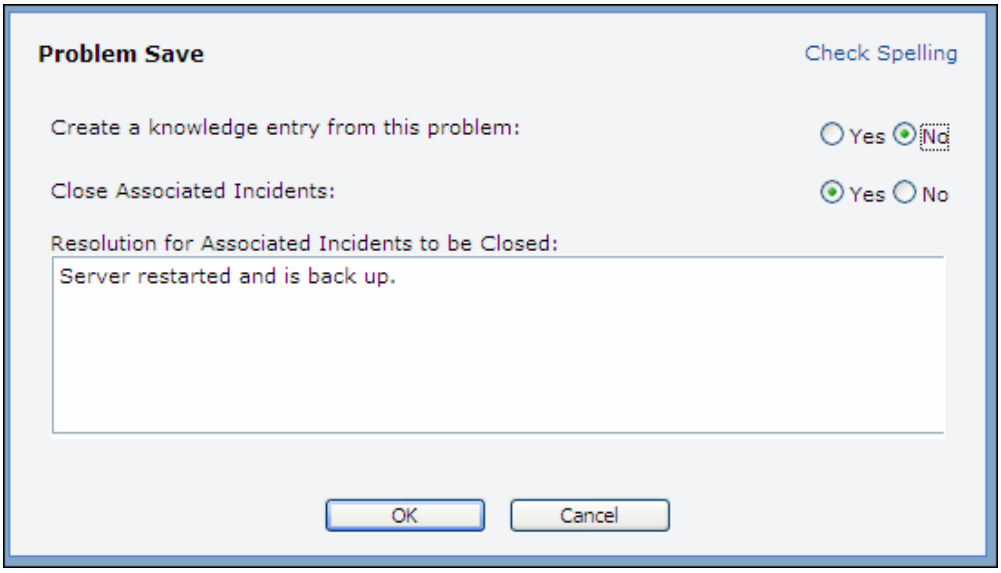
Use the Status field to designate the problem status. There are two basic status levels: Open and Closed. Different labels can be set up in the Configuration module for those status levels.



Closing the Problem

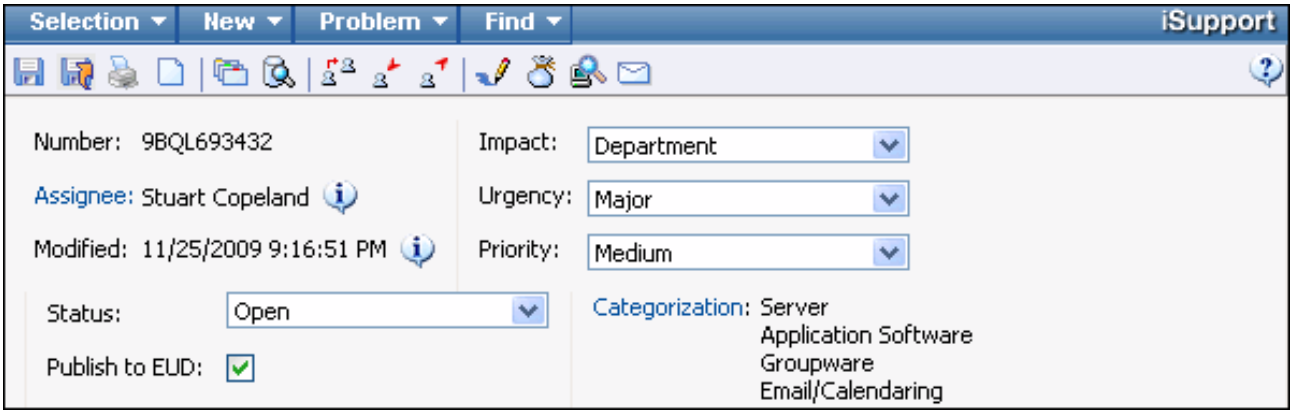
In order for a problem to be closed, entries must be made in the Categorization, Short Description, and Resolution fields. If configured, a prompt will appear for creating a knowledge entry. The knowledge entry will have a status of Pending Approval and will include the following from the Problem record: categorization, resolution, and short description as the issue description.

If configured, the Save dialog will include a field for closing incidents associated with the problem.



Selecting the Impact, Urgency, and Priority

Prioritization encompasses urgency (based on the amount of time a resolution is needed) and impact (usually the number of users affected). The Impact and Urgency values are defined and associated with the priority levels of Low, Medium, High, and Emergency in the Configuration module; these defined values will be available in the Impact and Urgency fields for selection. The mapped priority will appear as default but all priority levels are available if permissions are configured for you to change the priority.

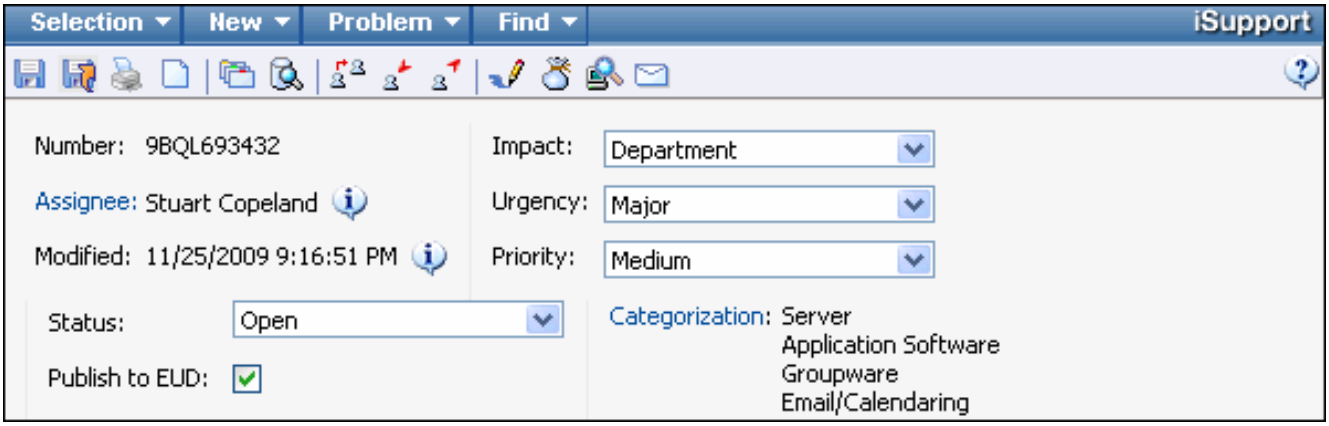


Examples of Impact, Urgency, and Priority mappings include:

Impact	Urgency	Priority
Individual	Minor	Medium
Department	Major	High
Company-wide	Minor	Medium
Company-wide	Critical	Emergency

Publishing to the End User Desktop

Select the Publish to EUD checkbox to display the problem on the End User Desktop. The fields that appear will depend on settings in the Configuration module.



Problems

Home | Problems

Created	Number	Status	Description	Workaround	Resolution
25-Nov-2009 20:58	9BQL693432	Open	Email is not accessible		Mailbox store mounted, allowing system to respond to connection attempts.

Users can click the Create Associated Incident link to submit an incident that will be associated with the problem. The text in the Short Description field will be included by default in the Description field in the Incident record.

Home | Problems | **Problem**

Create Associated Incident

Date Created: 25-Nov-2009 20:58 **Number:** 9BQL693432

Status: Open

Urgency: Major **Impact:** Department

Category: Server

Short Description:

Email is not accessible

Long Description:

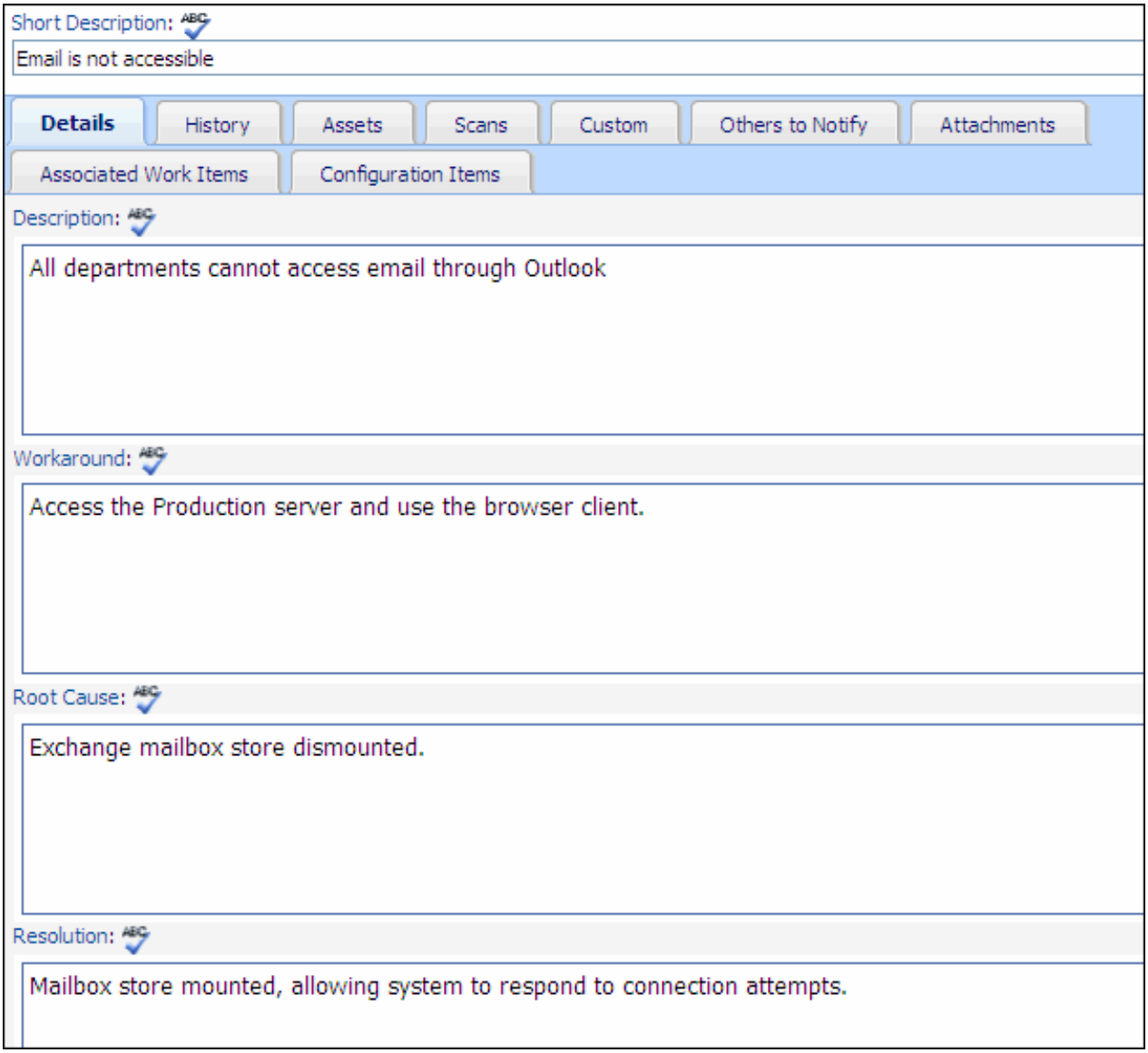
All departments cannot access email through Outlook

Root Cause:

Exchange mailbox store dismounted.

Entering the Workaround, Root Cause, and Resolution

Use the Workaround, Root Cause, and Resolution fields to enter details and troubleshooting information regarding the problem.



- In the Workaround field, enter details regarding any temporary methods of overcoming the problem. When an entry is made in either this field or the Resolution field and the record is saved, the record is designated as a Known Error.
- In the Root Cause field, enter details regarding the actual cause of the problem.
- In the Resolution field, enter details regarding the solution to the problem. When an entry is made in either this field or the Workaround field and the record is saved, the record is designated as a Known Error.

If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Description, Workaround, Root Cause, and Resolution fields; you can also display it by

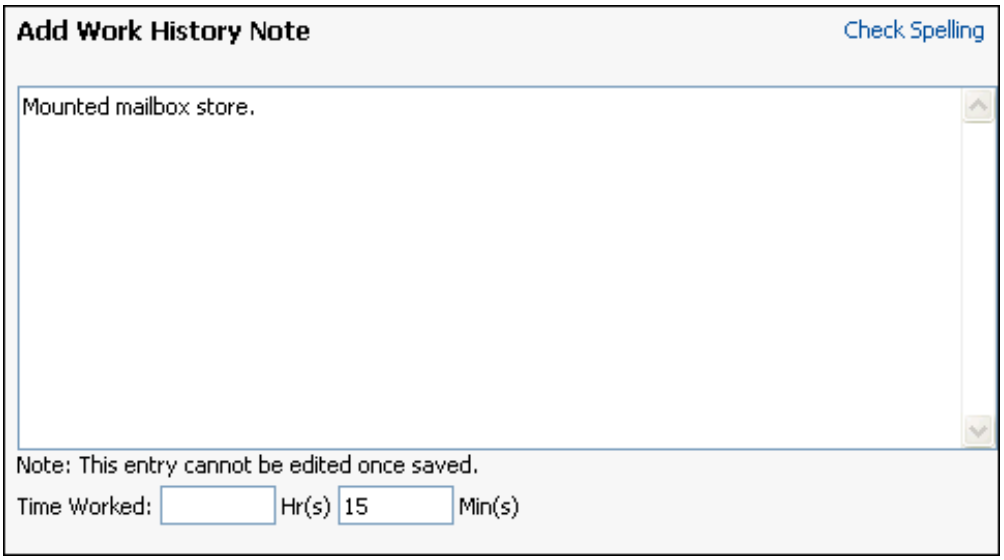
clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Entering and Viewing History

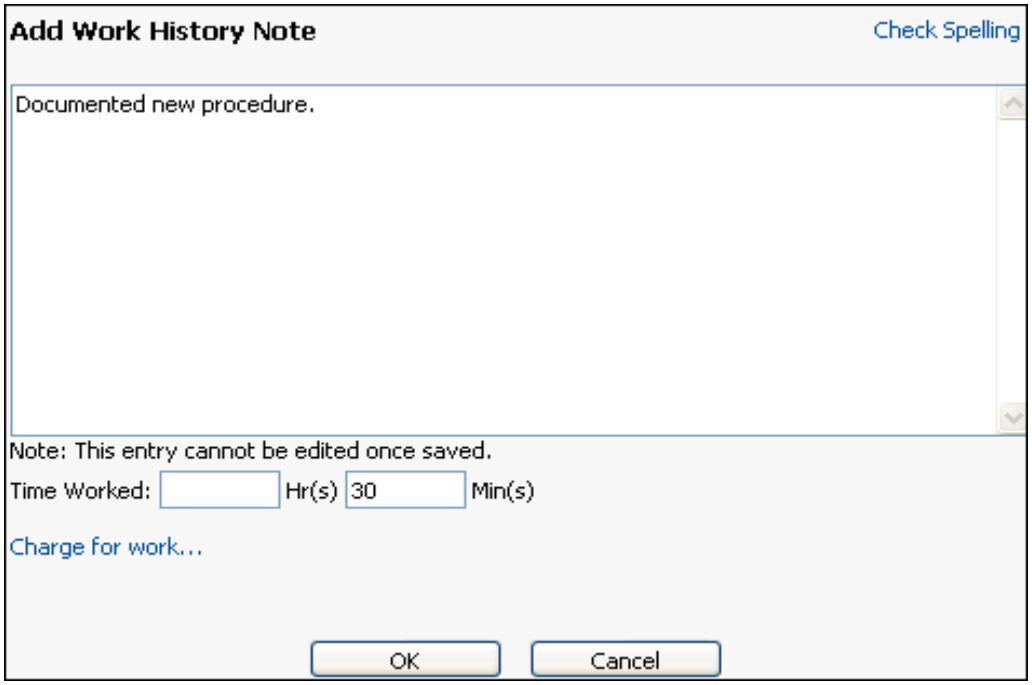
To enter information on any activities related to resolving the problem, click the icon or the Add Work History link on the History tab. For example, you can document customer contacts or conversations with customers or support staff. This field is useful when routing a problem to another support representative because it allows them to see the work that has been performed. If configured, you may be required to make an entry in the Time Worked field after entering work history.



Charging Time Worked Against Purchase Orders

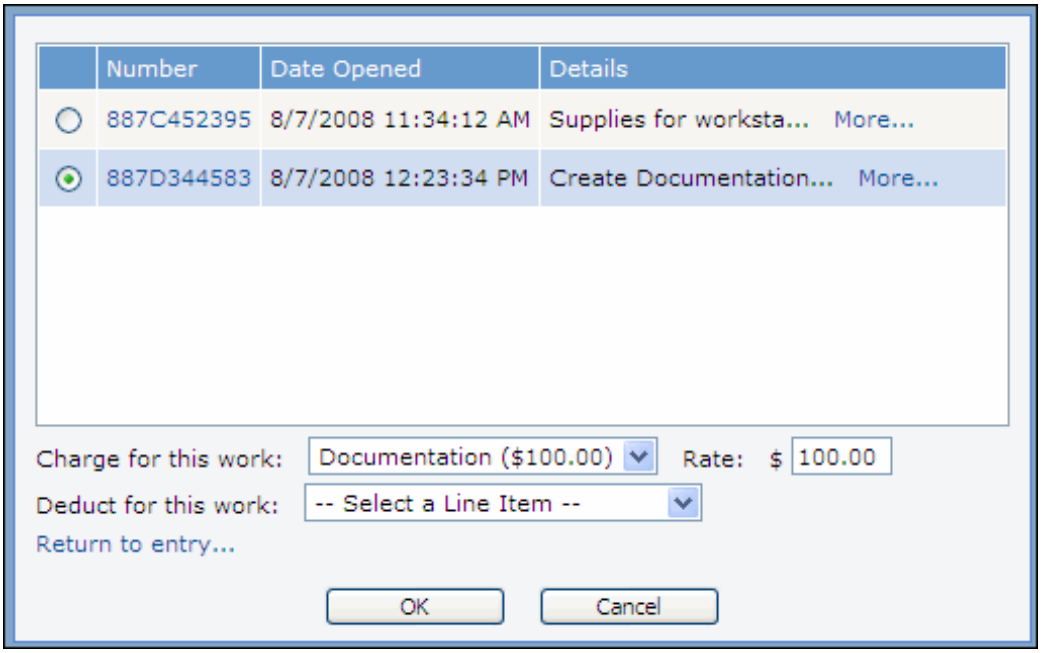
If Purchasing functionality is enabled, when entering time worked in the Problem screen, you can add a charge (an amount of time worked multiplied by a rate) as a separate line item or use a

charge to decrement an existing line item on an associated purchase order. After entering the time worked, click the Charge for Work link.

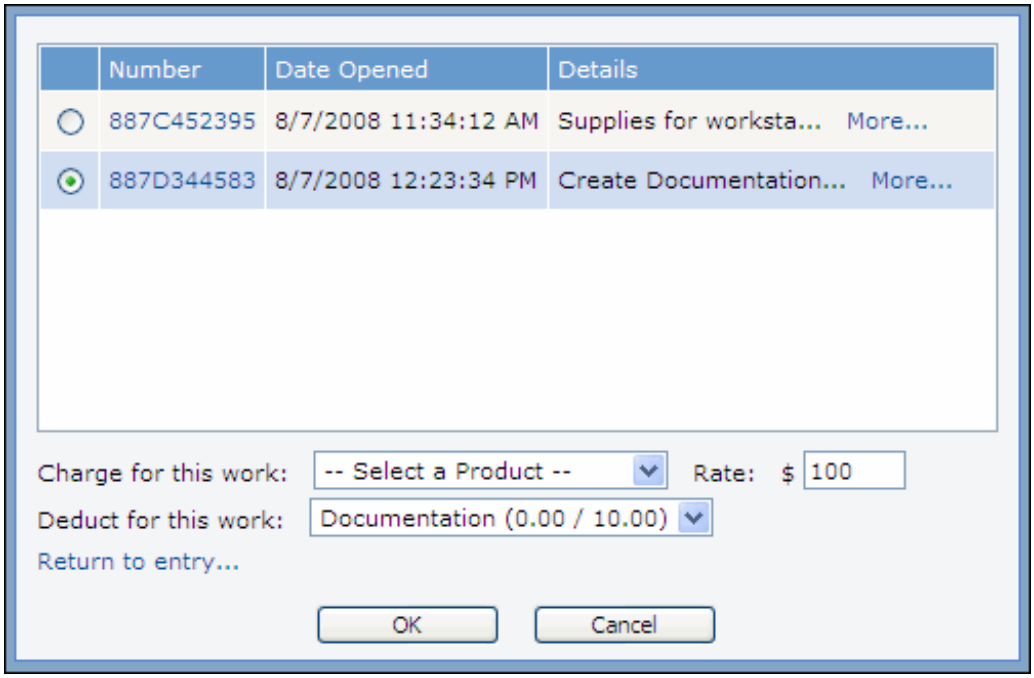


The purchase orders associated with the problem appear; select the purchase order for which the charge should be applied. Then:

- To **add a separate line item charge** to the purchase order (increasing the total amount), choose the product from the selected purchase order in the Charge For This Work field. In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog. Click OK

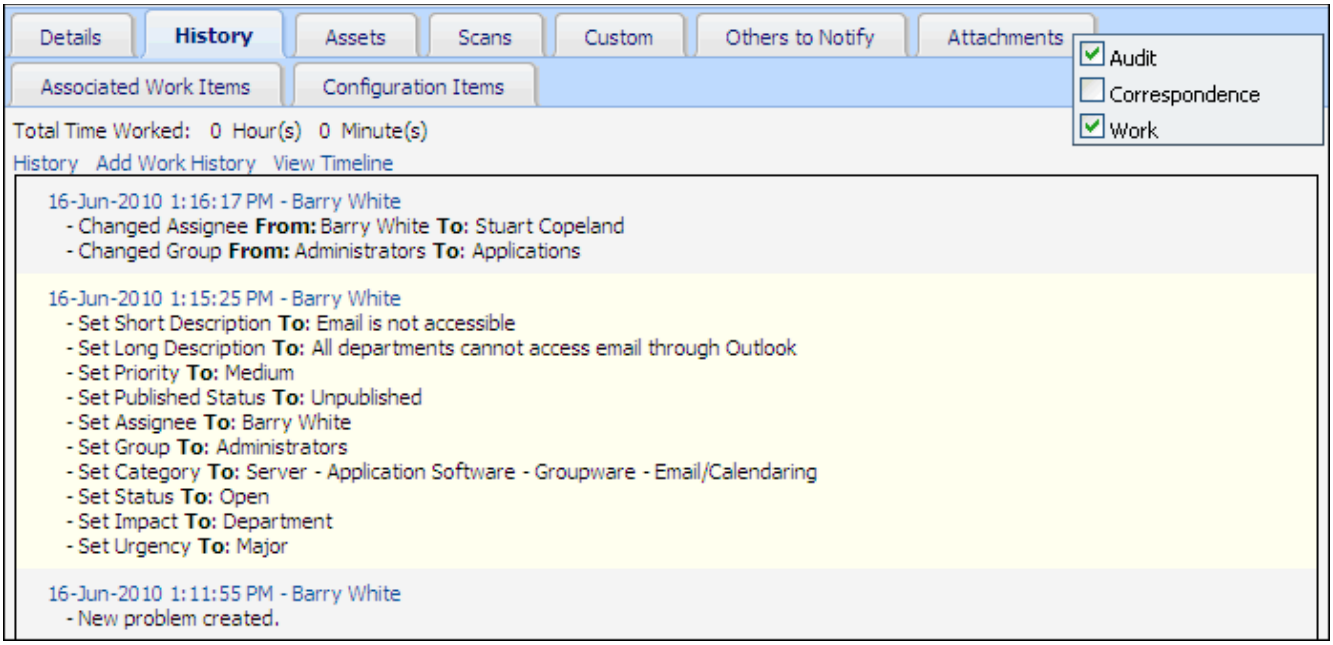


- To **use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order and click OK.



Viewing History Entries

Use the History tab to view notations on all Problem record actions.

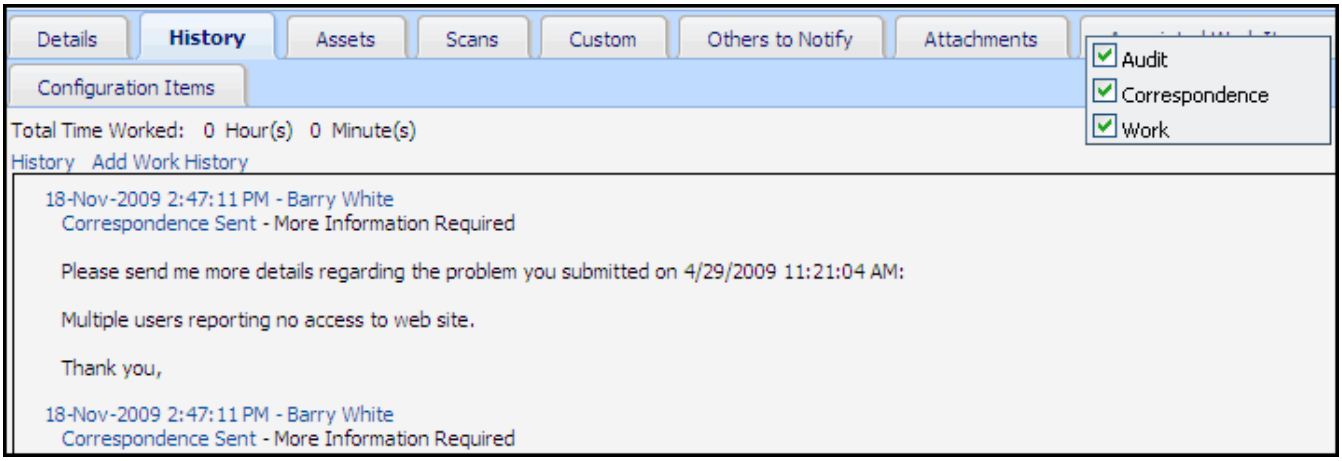


You can do the following:

- To view a notation of every action performed on the problem including the date, time, and author stamp, select the Audit checkbox.

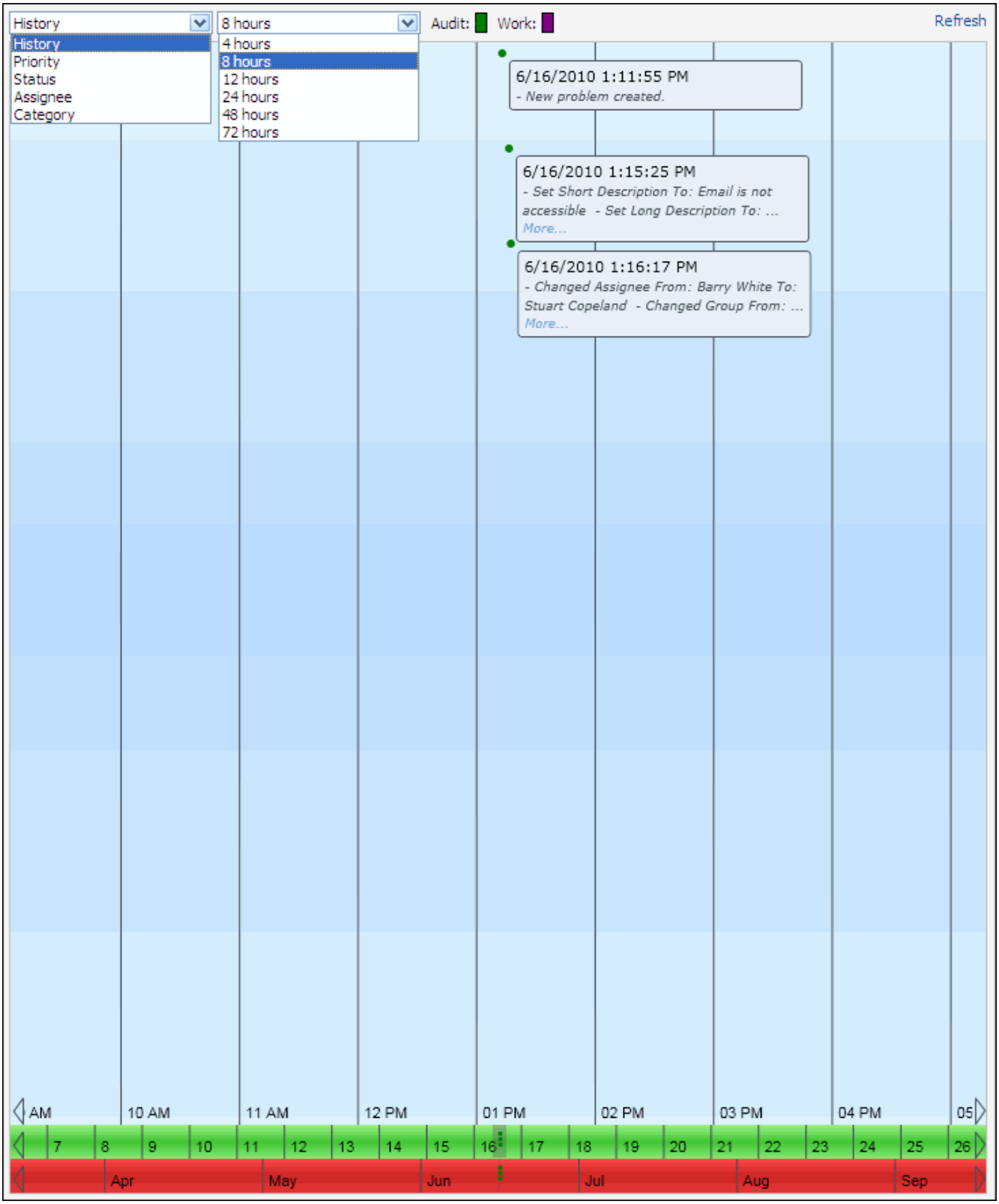
- The Correspondence checkbox displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen.

  If configured, an email sent to the inbound email account contains an existing incident, problem, or change (if enabled) number in the subject line or body, the matching record may be updated by including a notation in the Audit History field with a correspondence link to view the email and any attachments. An incident may be updated if an existing incident number is included in the subject or body of an email. Note that a space must be included before and after the number in order for the record to be updated. If configured, an acknowledgement email may be sent to the sender, and an email may be sent to the assignee of the record.



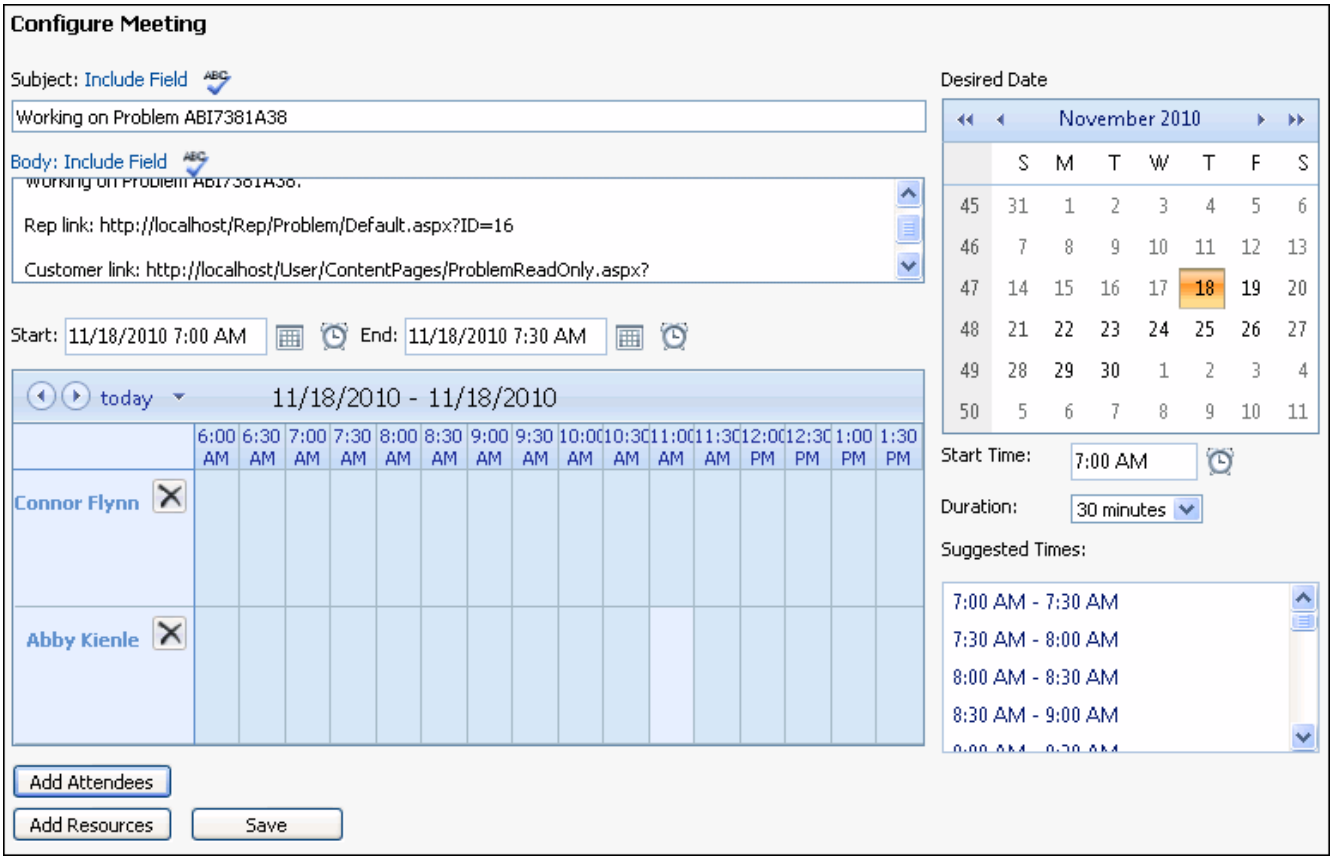
- To view Work History entries, select the Work checkbox.

Click the View Timeline link on the History tab to display historical problem events on a timeline. Use the dropdown fields to select the types of entries to display and the timeline increments. You can use your mouse to scroll the green hour bar and red month bar at the bottom of the screen.



Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Problem screen for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules of meeting attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

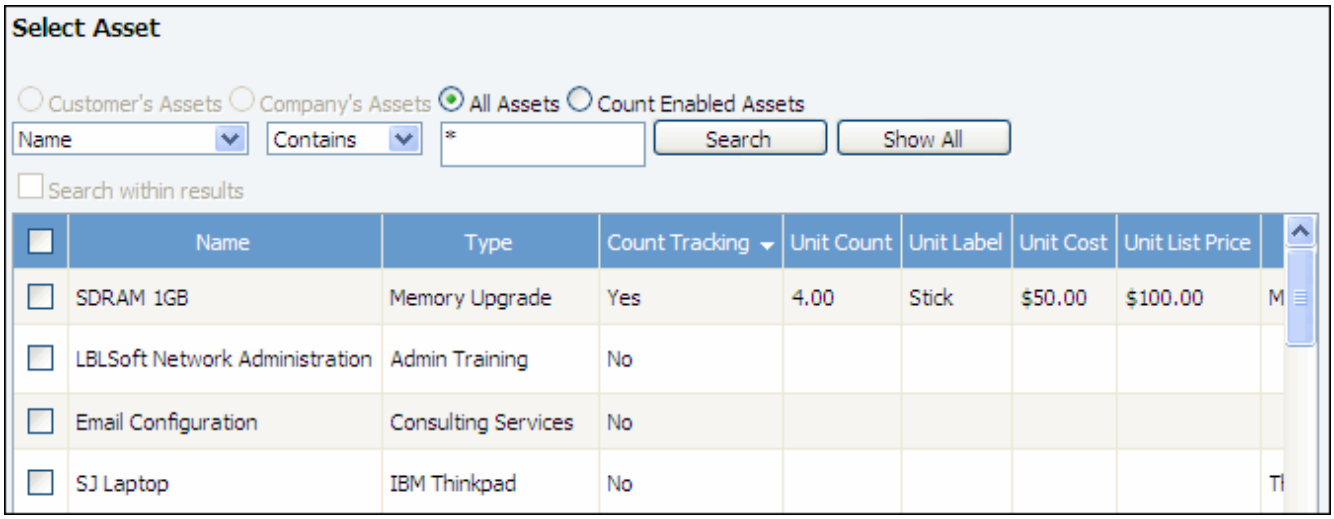
- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Problem *<record number>*" will be included by default in the meeting entry along with a link to the record via the Desktop and End User Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees. The assignee is added by default.

After saving, the View Meetings link will appear in the Problem screen for displaying meeting details.

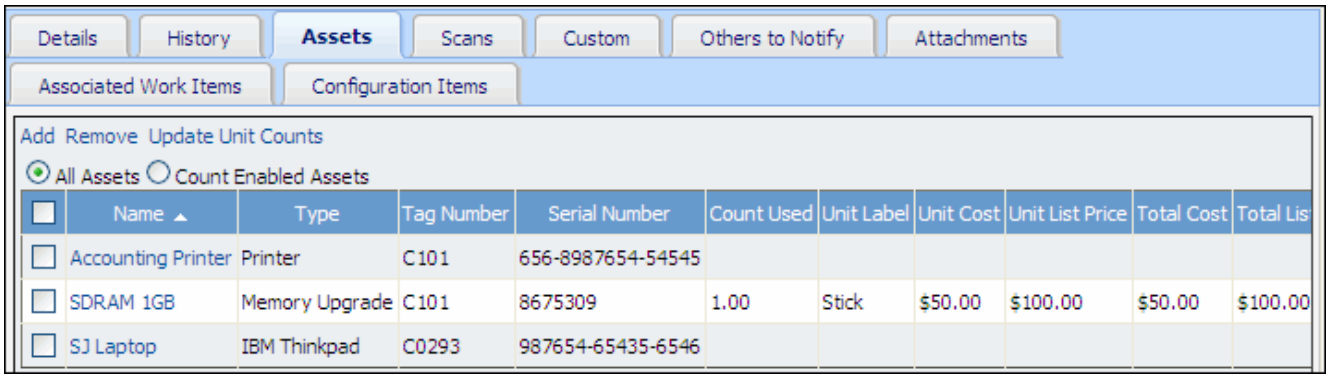
Associating Assets

You can associate assets with a Problem record. If configured, notifications can be sent to owners of the associated assets. To associate an existing asset, select Problem | Select Asset, click the Associate Asset icon, or click the Add link on the Assets tab (if the Assets tab is enabled to appear). You can select New | Asset to create a new asset record from the Problem screen but you'll need to select Problem | Select Asset to associate it.

If asset functionality is enabled during configuration and the Assets tab is configured to appear in the Incident screen, you can associate asset records with an incident. Click the Add Asset icon, click the Add link on the Asset tab, or select Incident | Select Asset to display the Select Asset dialog. You can display the customer's or company's assets, all assets, or assets with an asset type that has count tracking enabled.

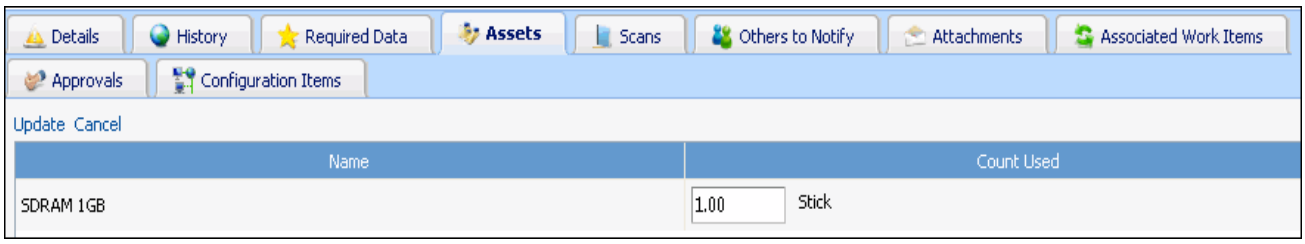


When count tracking is enabled for asset types, the Unit Count, Unit Label, Unit Cost, and Unit List Price fields will appear in the Asset screen if the type is selected.

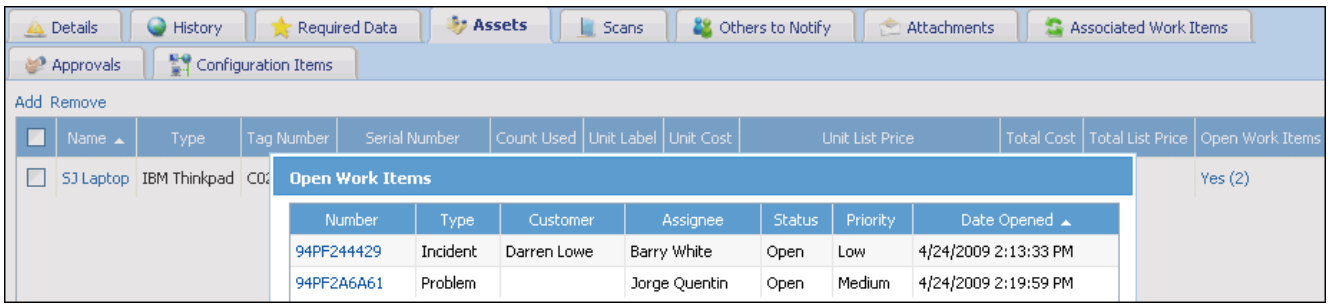


When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can click the Update Unit Counts link,

enter the number of units used, and decrement the unit count. A notification can be configured to be sent when a specified count is reached.



If the asset has other open incidents, problems, or changes associated with it, “Yes” will appear along with the number of open work items. Click the link to display a list of those items.



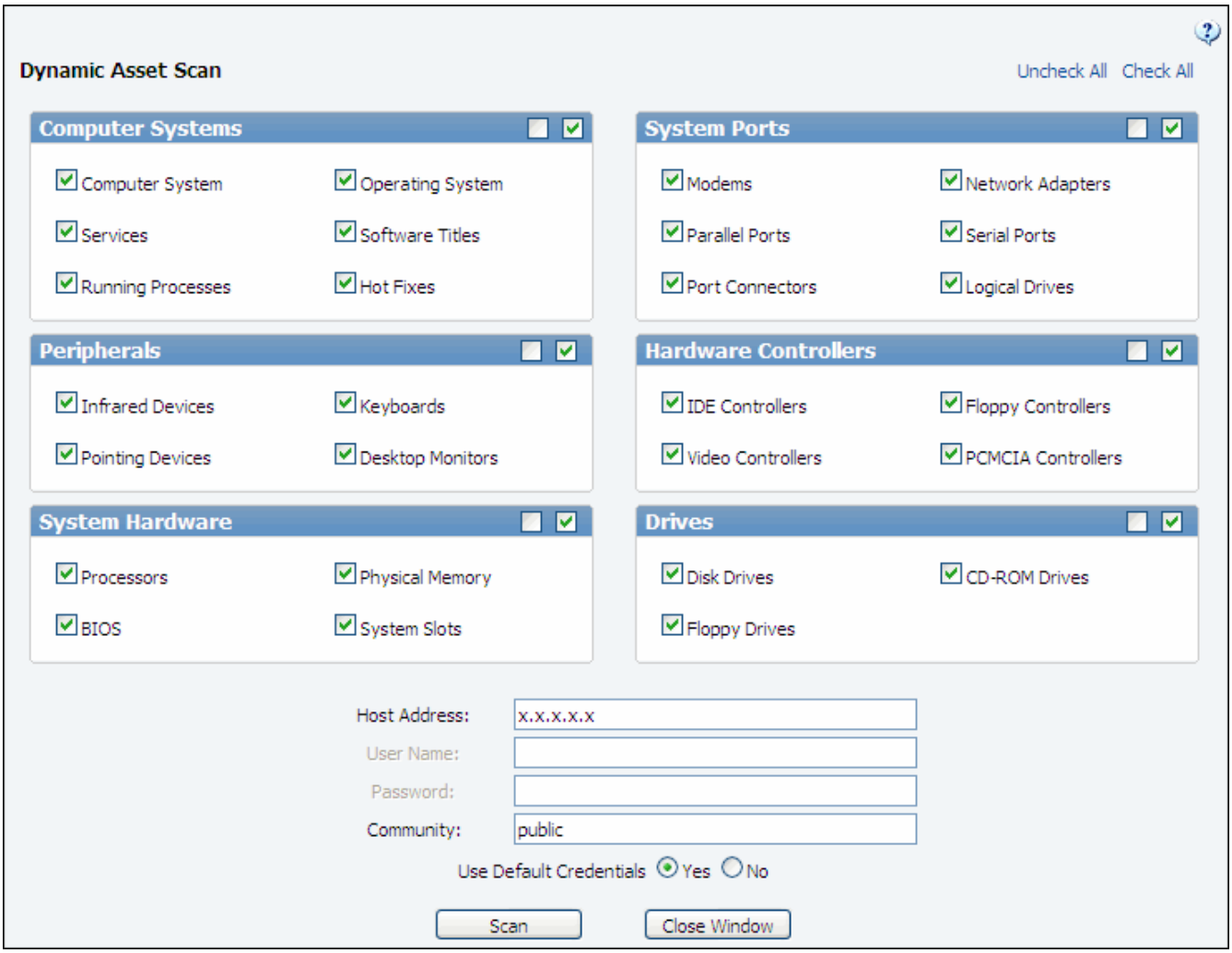
Performing and Associating Asset Scans

If configured, the Scans tab will appear in the Problem screen. Asset scans collect hardware, software, and service details automatically on a computer (Windows 98 and above or any other WMI-compliant machine; WMI must be installed and active) and on non-Windows devices on your local subnet. There are two types of scans in iSupport:

- You can perform a **dynamic asset scan** from the Desktop and the Incident, Problem, Change, and Asset screens.
- **Inventory asset scans** can be scheduled and run automatically according to an Inventory Scan Definition, which defines the hosts (remote machines) to be scanned during a specified start time and duration. Inventory scans include a more comprehensive set of data than dynamic scans.

To perform a scan, you will need to enter IP address or NetBIOS name of the machine to be scanned. The login used to run the scan must be in the Administrators group on the machine to be scanned. If you do not have this login, it can be set during configuration and accessed automatically by iSupport.

To initiate a scan in the Problem screen, click the Scan icon, select New | Scan or click the New Scan link on the Scans tab. The Dynamic Asset Scan dialog appears:



In the Dynamic Asset Scan dialog, select the types of data to include in the scan. To select all checkboxes in a section, use the icon; to clear the checkboxes in a section, use the icon. Use the Uncheck All and Check All links for all checkboxes.

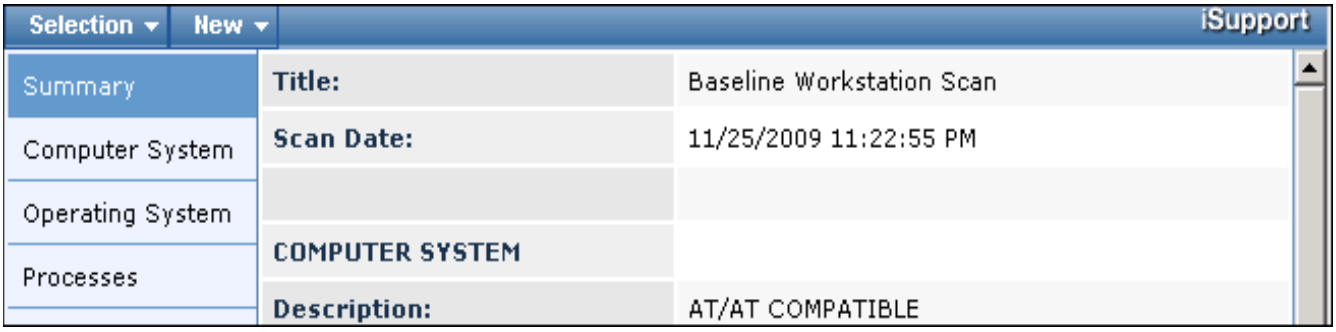
In the Host Address field, enter the identifier of the system to be scanned (IP address, machine name to scan in the current domain, or domain\machine name).

In the User Name and Password fields, enter the user name and password for accessing the machine to be scanned; this login can be set up during configuration and accessed automatically by iSupport.

If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device) in the Community field. Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".

When finished, click the Scan button.

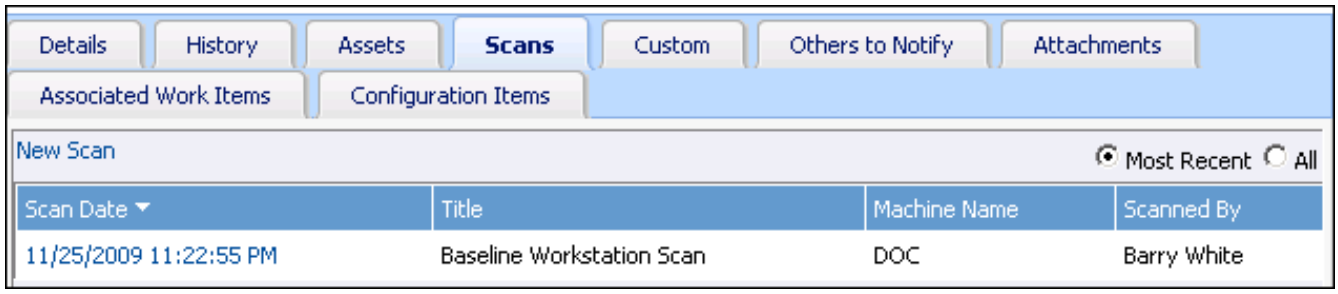
After the scan has finished, the Scan Results dialog appears as shown in the example below. Use the links on the left to quickly move to a certain portion of the scan. Choose Save on the Selection menu to save the scan and enter a title.



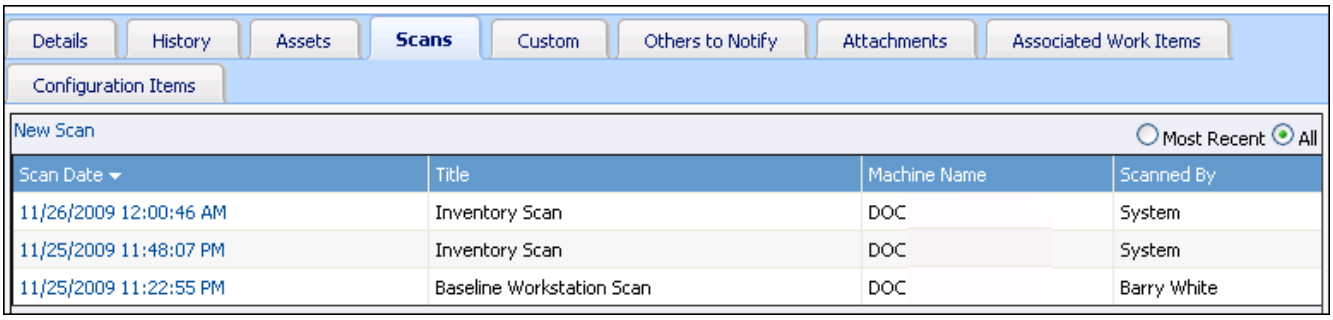
Choose Attach to Problem on the Selection menu to attach the scan to the current problem. If an asset with a scannable asset type (set up during configuration) is associated with the current problem, you can choose Attach to Asset and Attach to Problem and Asset on the scan's Selection menu to attach the scan to the asset record and the current problem. You can detach scans later if needed.

If you have sufficient permissions, you can generate and save a side-by-side comparison of two scans (dynamic or inventory). From an existing scan, choose New | Scan Comparison, and select the second scan. You can save and title the scan comparison.

If the Scans tab is enabled to appear, the Most Recent radio button on the Scans tab in the Problem screen displays the most recent dynamic scan attached to the problem, and most recent inventory and dynamic scan attached to any scannable asset selected on the Assets tab (if the Assets tab is enabled to appear).



The All radio button displays all dynamic scans attached to the problem, and all inventory and dynamic scans attached to any scannable asset(s) selected on the Assets tab.



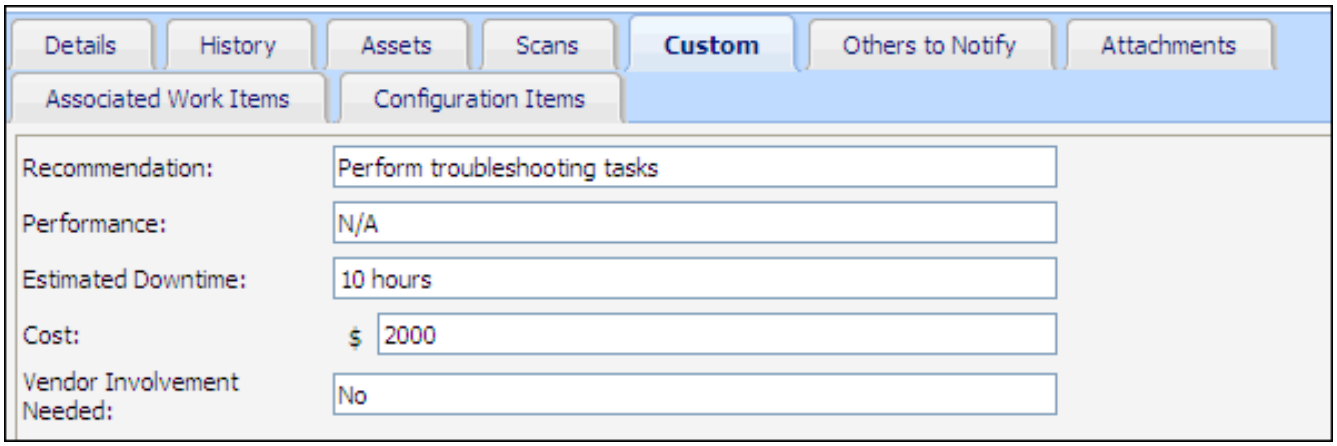
To detach a scan, click on the Scan Date link to open it and choose Detach from the scan's Selection menu.

Completing Custom Fields

The fields on the customizable tab are used to enter information specific to your company. The name of the tab is specified during configuration. Custom fields can be configured to:

- Always appear on this tab
- Appear when a certain category is selected

You may be required to enter information in these fields. If a problem is recategorized, data saved in custom fields is retained and the custom fields associated with the newly-selected category set are added.



Specifying Others to Notify

If enabled in configuration, you can use the Others to Notify feature to set up a list of people that are not directly involved in the Problem process to be sent problem event notifications and other correspondence. Those on Others to Notify lists can be designated in configuration to be notification recipients for the following problem events:

- Initial Problem save
- A Work History entry is added
- Route
- An entry is made in the Workaround field
- The Publish checkbox is selected
- The Closed status is selected

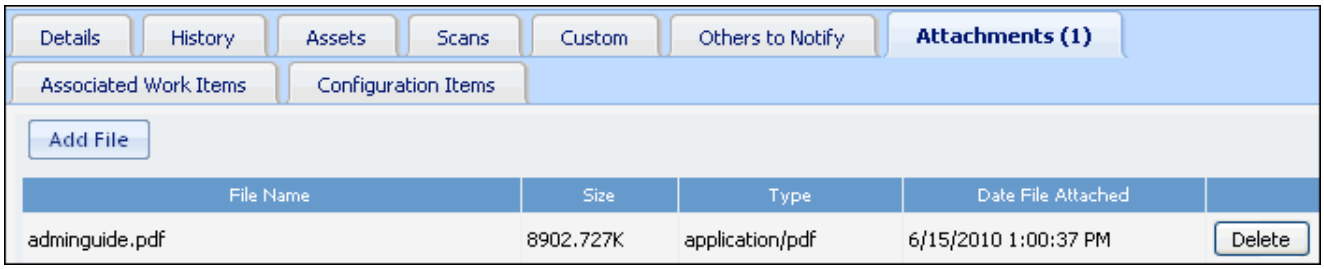
In iSupport, an Others to Notify list can be set up for an individual customer, all customers in a company, a category set, an individual incident, an individual problem, and an individual change.

To add a customer or support representative to the problem-specific Others to Notify list, click the Add link on the Others to Notify tab. Use the Remove link to delete anyone from this list.

The All radio button will also include the Others to Notify list for the selected categorization. You cannot change entries in this list via the Problem screen.

Attaching Files

To attach a file to the problem, click on the Add File button on the Attachments tab and select the file. The file name appears in the Attachment field.



Associating Other Items

Associating Incidents, Changes, and Purchase Requests

You can associate new and existing incidents, changes, and purchase requests with a Problem record. A configuration option can also be set to close the associated incidents when a Closed status is selected for the problem. The Closed status assigned to the closed incidents can also be configured. If configured, notifications regarding Problem events can be sent to customers of associated records.

- Select New | Associated Incident or click the New Incident link on the Associated Work Items tab to create a new incident that will be associated with the Problem record. The short description and long description specified for the problem will be included in the Description field, and the categorization and priority specified for the problem will be included in the corresponding fields on the incident. See "Working with Incidents" on page 171 for more information on completing Incident fields.
- Select Problem | Associate Incident to associate existing incidents with the Problem record.
- Select New | Associated Change or click the New Change link on the Associated Work Items tab to create a Change record. See "Working with Change Records" on page 297 for more information on completing Change fields. The short description and long description specified for the problem will be included in the Description field, and the categorization specified for the problem will be included in the Categorization field on the Change record.
- Click the Existing Change link on the Associated Work Items tab to associate existing Change records with the Problem record.
- Select New | Associated Purchase Request or click the New Purchase Request link on the Associated Work Items tab to create a new purchase request that will be associated with the Problem record. The short description and long description specified for the problem will be included in the corresponding fields, and the categorization and priority specified for the problem will be included in the corresponding fields on the purchase request.
- Select Problem | Associate Purchase Request to associate existing purchase requests with the Problem record.

The records appear on the Associated Work Items tab as shown in the example below. To disassociate a record, select the record and click the Disassociate link.

Details | History | Assets | Scans | Custom | Others to Notify | Attachments | **Associated Work Items**

Configuration Items

Disassociate Associate: Incident (New / Existing) Change (New / Existing) Purchase (New / Existing) Refresh

Number	Type	Customer	Assignee	Status	Priority	Date Opened ▲
9ARG223524	Change	Bob Jones		Open	Low	10/26/2009 3:11:24 PM
9ARG241728	Purchase Order	Steve Johnson		Open		10/26/2009 3:13:06 PM
9ARG255354	Incident	Steve Johnson	Barry White	Open	High	10/26/2009 3:14:42 PM

An asterisk appears next to any number if the problem was created from an incident, change, or purchase request.

Associating Configuration Items

If you have the Service Desk Edition, click the Add link on the Configuration Items tab to associate a predefined configuration item with the Problem record. You can click on the associated configuration item to display the Configuration Item screen for viewing the item's relationships with other items, and include information on associated configuration items in views, reports, and correspondence. See "Working with Configuration Items" on page 403 for more information. If the configuration item has other open incidents, problems, or changes associated with it, "Yes" will appear along with the number of open work items. Click the link to display a list of those items.

Associated Work Items | **Configuration Items**

Add Remove

Name ▲	Type	Open Work Items
Exchange Server 45	Mail Server	Yes (3)

Open Work Items

Number	Type	Customer	Assignee	Status	Priority	Date Opened ▲
ABLC525745	Incident	Henry Alder	Barry White	Open	Medium	11/21/2010 11:41:46 AM
ABLC561243	Problem			Open	Medium	11/21/2010 11:45:01 AM
ABLC581757	Change			Open	Low	11/21/2010 11:47:06 AM

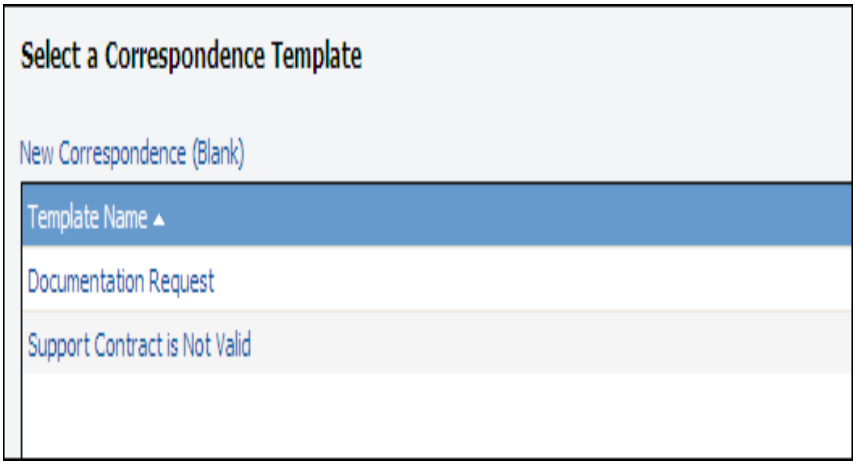
Performing Miscellaneous Problem Tasks

Sending an Email From a Problem Record

To send an email from the Problem screen, you can:

- Select New | Correspondence.
- Click the New Correspondence icon.

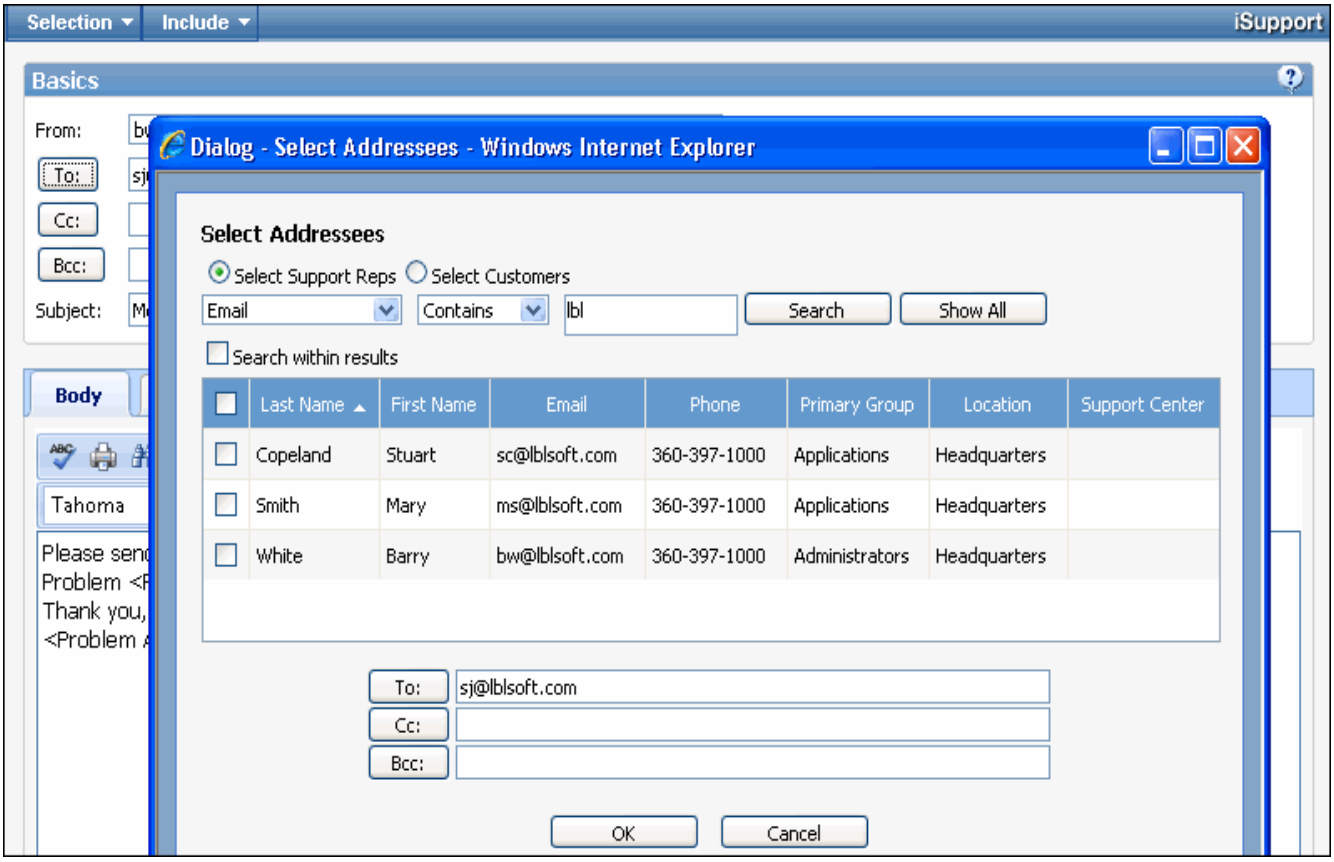
You can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).



Correspondence templates may be configured to contain only read-only (greyed out) fields.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included.

You can click the To, Cc, and Bcc buttons in the Correspondence screen to display a dialog for selecting addressees. Use care with the Select All ☐ checkbox, as it will include all names on the current page (up to 100 addressees).

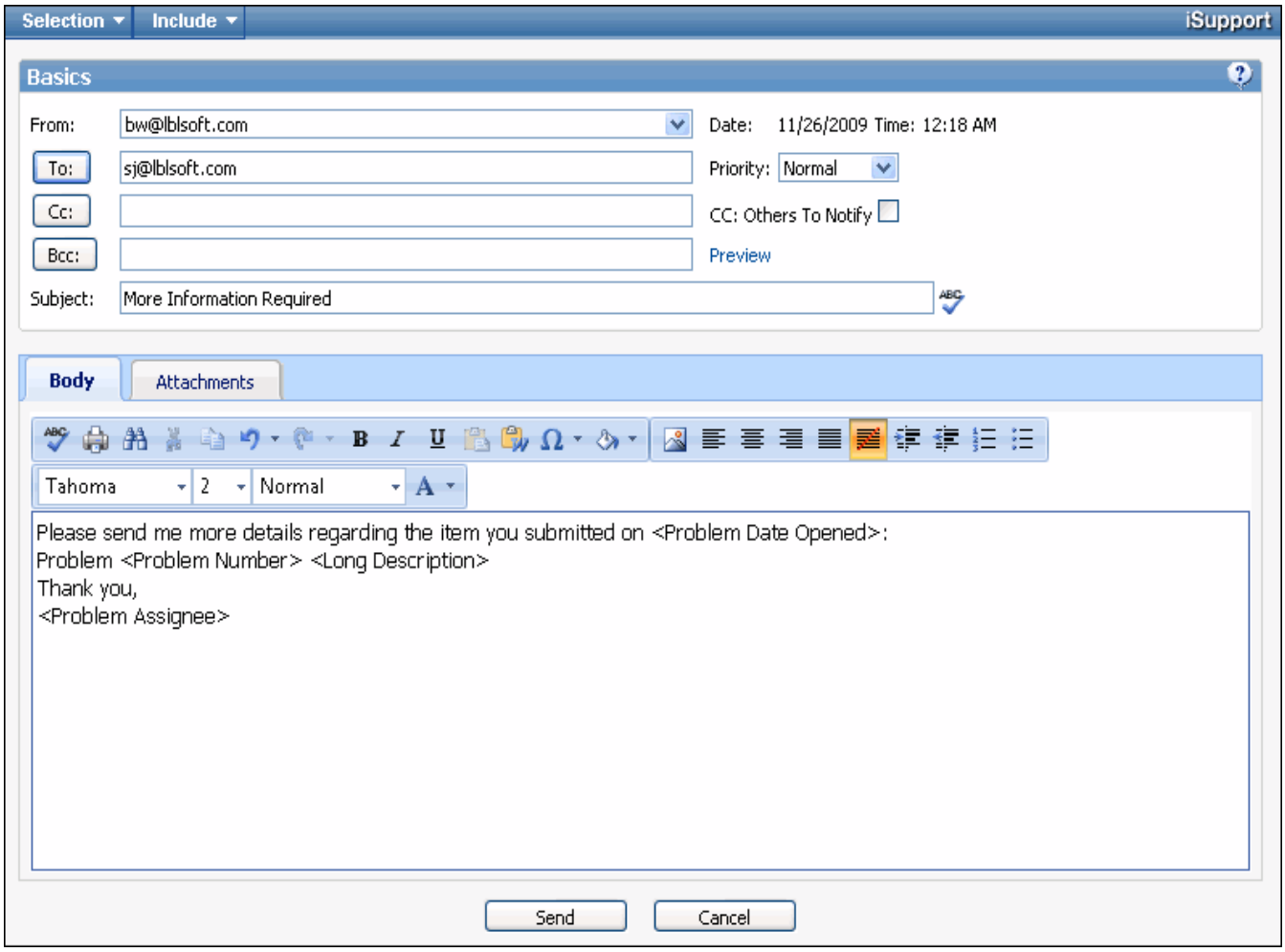


The cc:Others to Notify field in the Correspondence screen enables you to send the correspondence to those designated in the Others to Notify field in the current problem and selected categorization.

If using a template, some or all of the fields may be populated. Fields (for example, <Status>) may be included as set up during configuration. These fields will be replaced with corresponding data from the problem when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

In either a blank correspondence or correspondence created from an editable template, the Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).

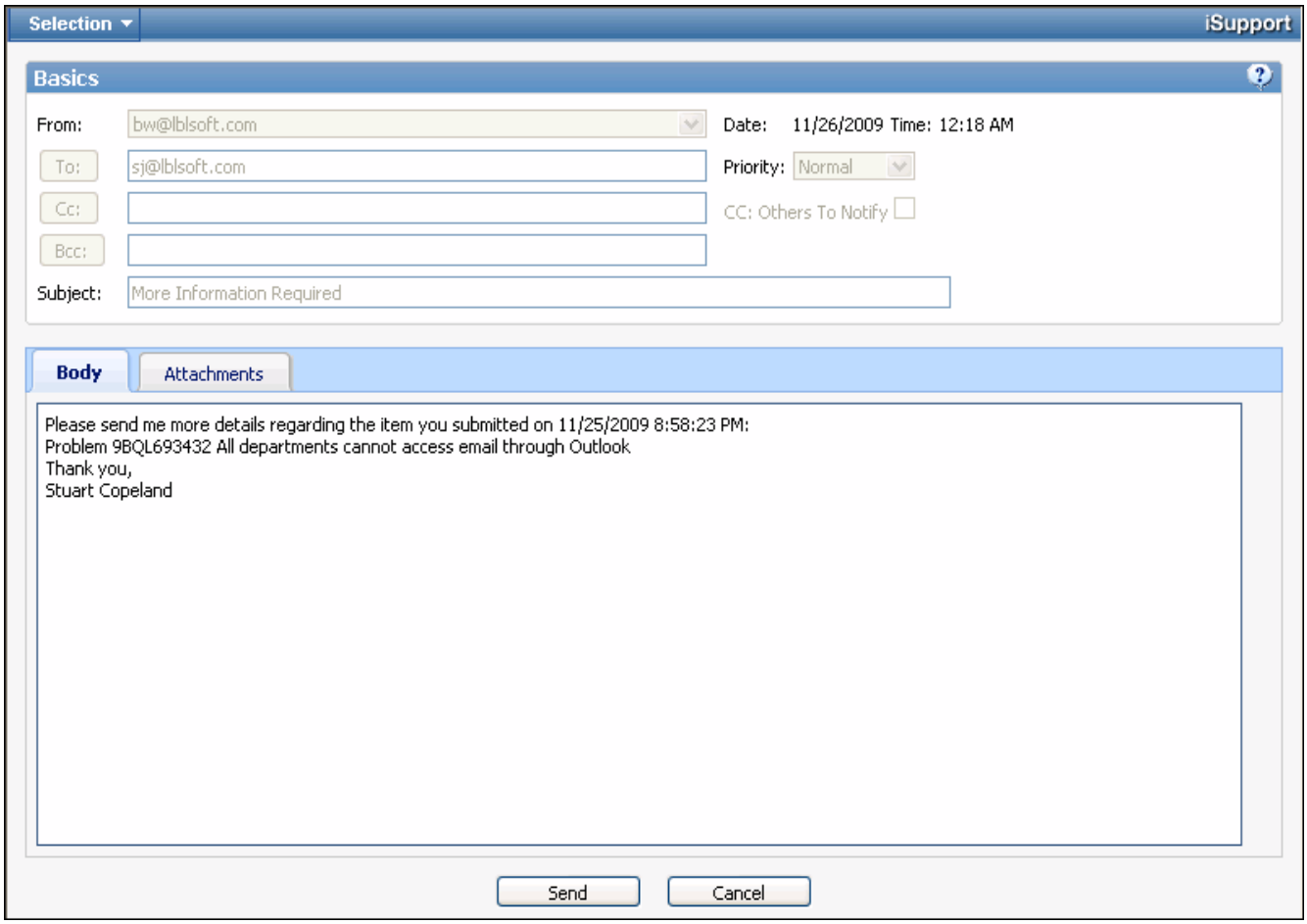


If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Body field; you can also display it by clicking the field label link to display a larger window. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the problem.



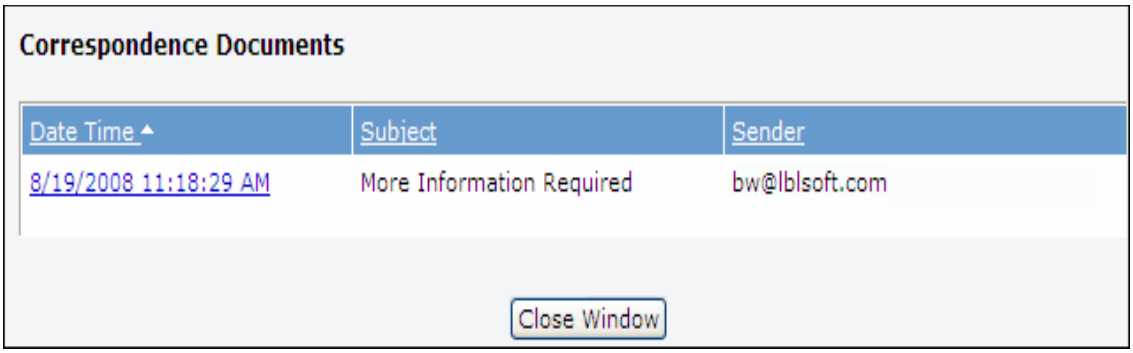
When finished completing fields in the Correspondence dialog, click the Send button. After the email is sent and the problem is saved, notations are included on the History tab.

Searching From the Problem Screen

From the Problem screen, you can use the Find menu to:

- Select Find | Knowledge for Categorization or click the Find Knowledge for Categorization icon to search for knowledge entries that have same categorization as the current problem.
- Select Find | Call Script to search for the call script associated with the selected categorization.
- Select Find | Incidents for Categorization to search for incidents that have the same categorization as the current problem.
- Select Find | Problems for Categorization to search for problems that have same categorization as the current problem.

- Select Find | Correspondence for Problem to display all correspondence sent from the current problem.



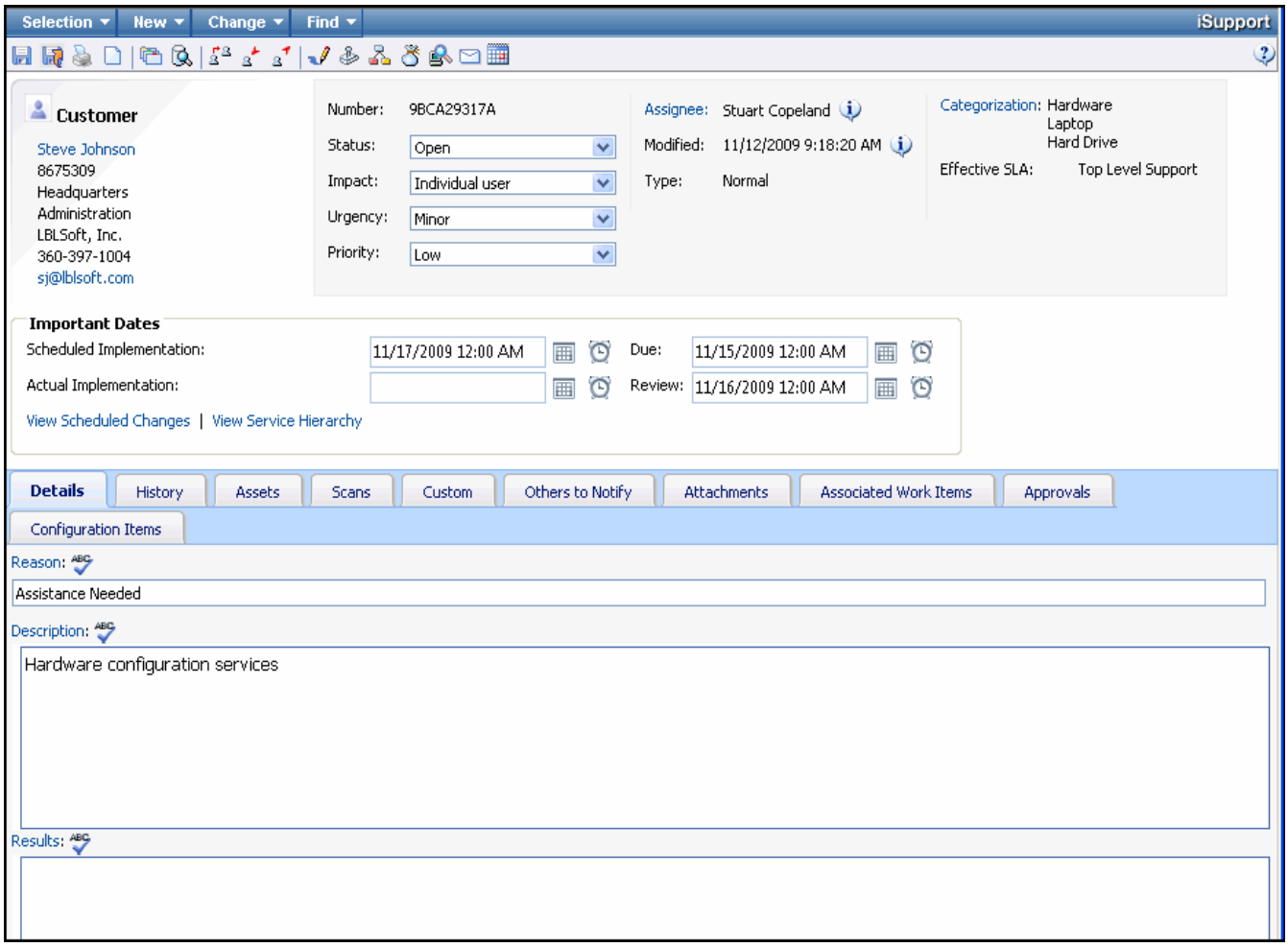
  From the Correspondence Documents dialog, you can open a document by clicking on it. System-generated correspondence is not included in this dialog.

- Select Find | Correspondence for Configuration Items to display all correspondence send from the associated configuration items.

7 Working with Change Records

Overview

Change functionality is available if you have the Service Desk version of iSupport. Use Change functionality to record and track requests related to services and assets. Frequent requests with similar content can be automated via templates for efficient resolution. A Change record can be created from the Incident, Problem, Service Request, and Purchase Request screen, Desktop, and End User Desktop.



The *iSupport Administrator's Guide* contains information on setting up all Change functionality.

Functionality may not be accessible if disabled or disallowed due to permissions set during configuration. This chapter contains information on **all** Change functionality.

In This Chapter

This chapter contains the following on entering essential change information:

- "Selecting the Change Type" on page 299.
- "Categorizing the Change" on page 300.
- "Using Change Templates" on page 301.
- "Entering the Reason and Description" on page 302.
- "Saving the Change" on page 302.

You can also perform the following miscellaneous change tasks while entering change information:

- "Accessing Outlook Calendar" on page 303.
- "Selecting an Assignee" on page 305.
- "Selecting the Status, Impact, Urgency, and Priority" on page 309.
- "Selecting the Change Status" on page 309.
- "Scheduling Changes" on page 312.
- "Entering Important Dates" on page 314.
- "Entering and Viewing History" on page 316.
- "Associating Assets" on page 320.
- "Completing Custom Fields" on page 324.
- "Specifying Others to Notify" on page 325.
- "Attaching Files" on page 326.
- "Associating Work Items" on page 326.
- "Sending an Email From a Change Record" on page 328.

- "Searching From the Change Screen" on page 332.
- "Viewing Change Records Created via Service Requests" on page 342.
- "Working With Approval Cycles" on page 333.
- "Resolving Changes" on page 340.
- "Creating Change Hierarchy Structures" on page 343.
- "Using Hierarchy Templates in the Change Screen" on page 347.

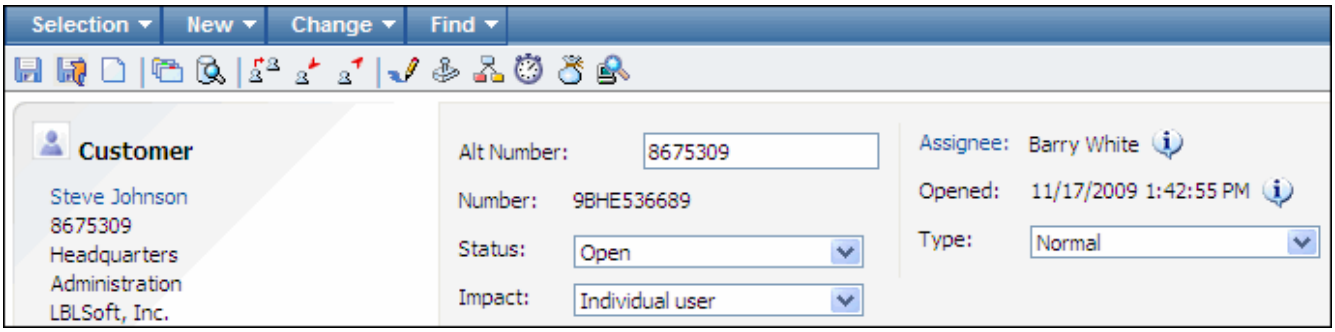
Entering Essential Change Information

To create a Change record, select Create | Change on the Desktop action menu.

The only information required in order for a Change record to be saved is the categorization, reason, and description. Be sure to verify the default in the Change Type field before saving, however, because after you save the change, you cannot modify the selection in the Change Type field. An entry in the Results is required in order for a Change record to be closed.

Entering a Custom Number

A unique number is assigned to each Change record; a custom number field may also be configured to appear above the Number field ("Alt Number" in the example below). This number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. The field may be read-only after you enter the number and save the record.



Selecting the Change Type

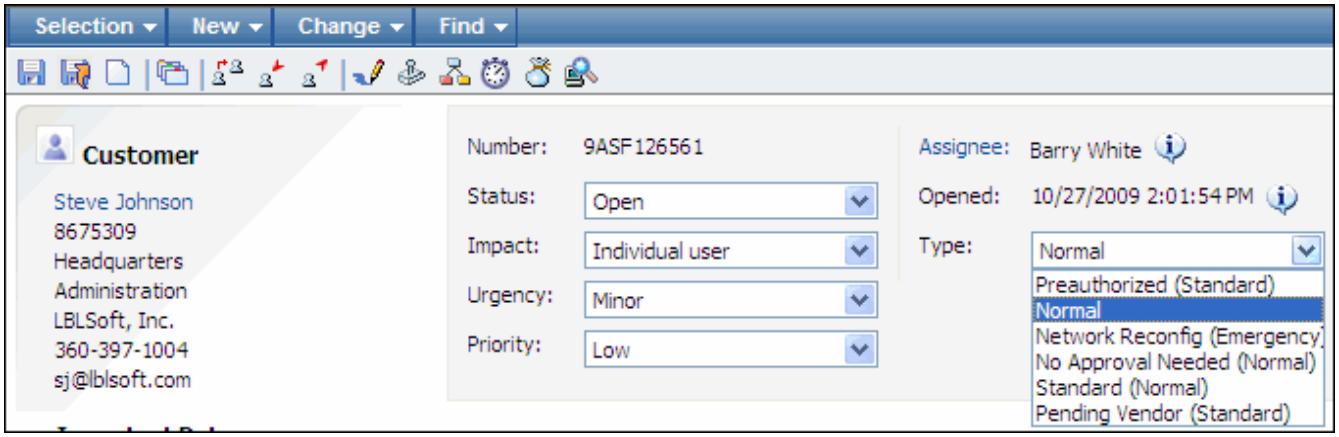
Select the type of change in the Type field. There are three basic change types: Standard, Normal, and Emergency. According to ITIL, these basic change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.

- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

Different labels can be set up in the Configuration module for these types.

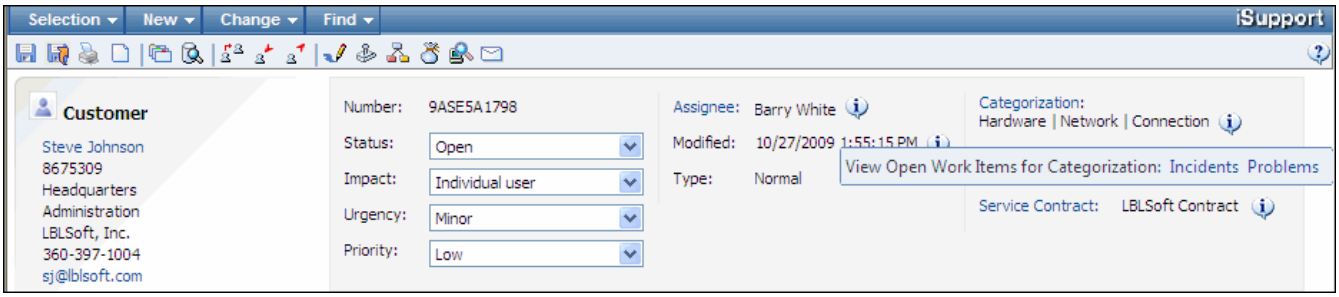
After you save the change, you cannot modify the selection in the Change Type field.



Categorizing the Change

Categories are used for skill-based routing, reporting, incidents, Change and Problem records, and knowledge entries. Categories are enabled in sets of up to five levels; the first level is fairly general and the last level is fairly specific.

To select a category set for a change, select Change | Categorize, click the Categorization link, or click the Categorize icon. A dialog appears containing predefined categories; expand the entries and select the one that best describes the change. If there are other incidents, problems, or changes that have the same categorization, the icon appears for you to view those records.

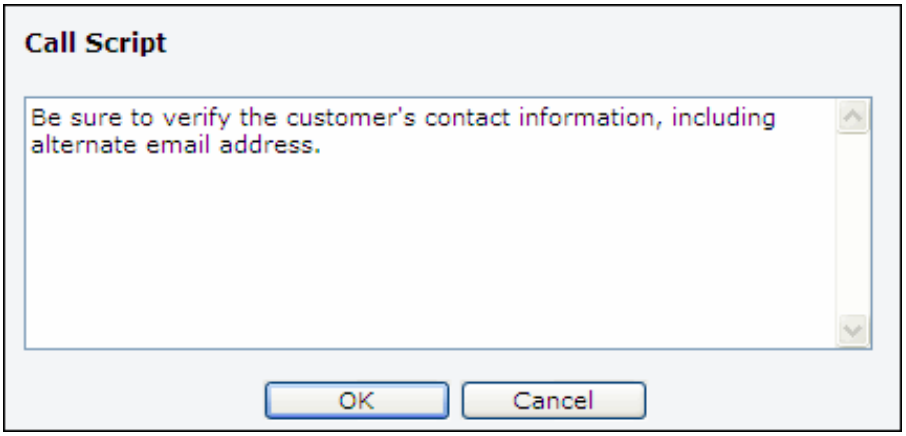


You can associate a single Problem record and multiple new and existing Incident records with a Change record. Configuration options can be set to close the associated incidents and/or problem when a Closed status is selected for the change; the Closed status assigned to those records can also be configured. See "Associating Work Items" on page 326 for more information.

Completing Call Scripts

Call scripts are associated with specific category combinations and can contain instructions on gathering information, a list of questions to ask, or other related items. If a call script is associated

with the selected category set, the script appears in a dialog when the category set is selected. Follow the script, enter responses to questions if applicable, and click OK.



If enabled in configuration, the information will be automatically entered in the Work History field. If you need to display the call script later for reference, select Find | Call Script.

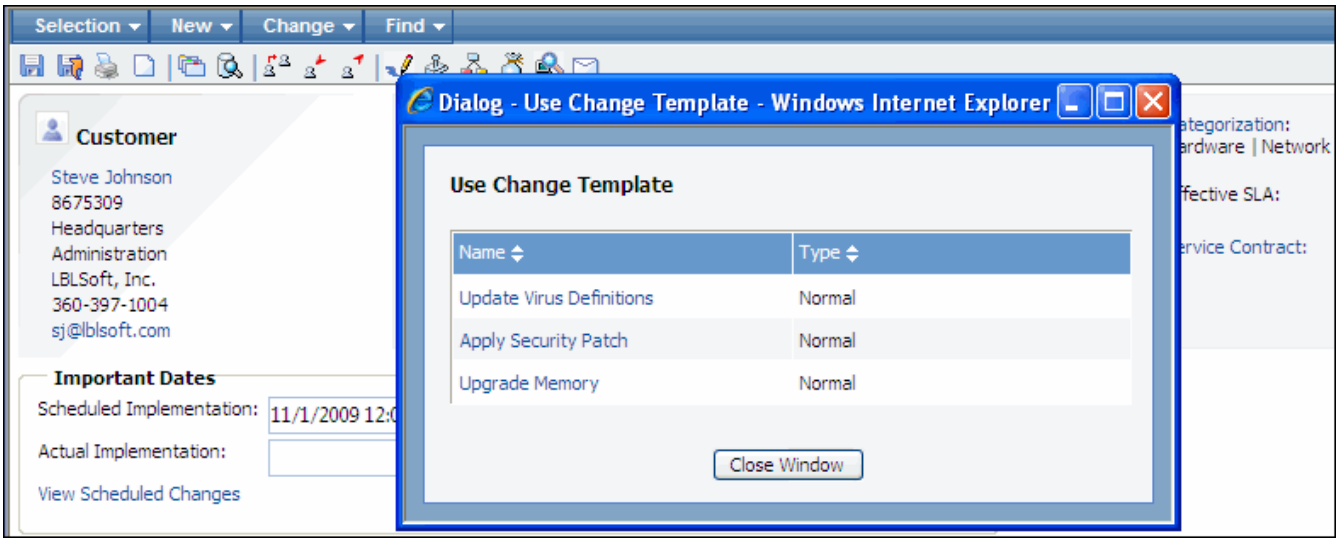
Using Change Templates

Use templates for change requests that occur frequently. If configured, defaults may populate fields in the Change screen and End User Desktop. If a script is associated with the category combination, it can be enabled to display when the template is selected.

An SLA may be assigned to a template. If you select a template with an SLA, the SLA assigned to the template will replace any existing SLAs that may be in effect (for the category, customer, or company). When the template is selected from the End User Desktop, it takes effect based on the change creation date and time. For more information on custom SLAs, see "Service Level Agreements" on page 155.

To use a change template, click the icon or select Change | Use Change Template.

A dialog appears containing a list of predefined template names; select one and click OK.

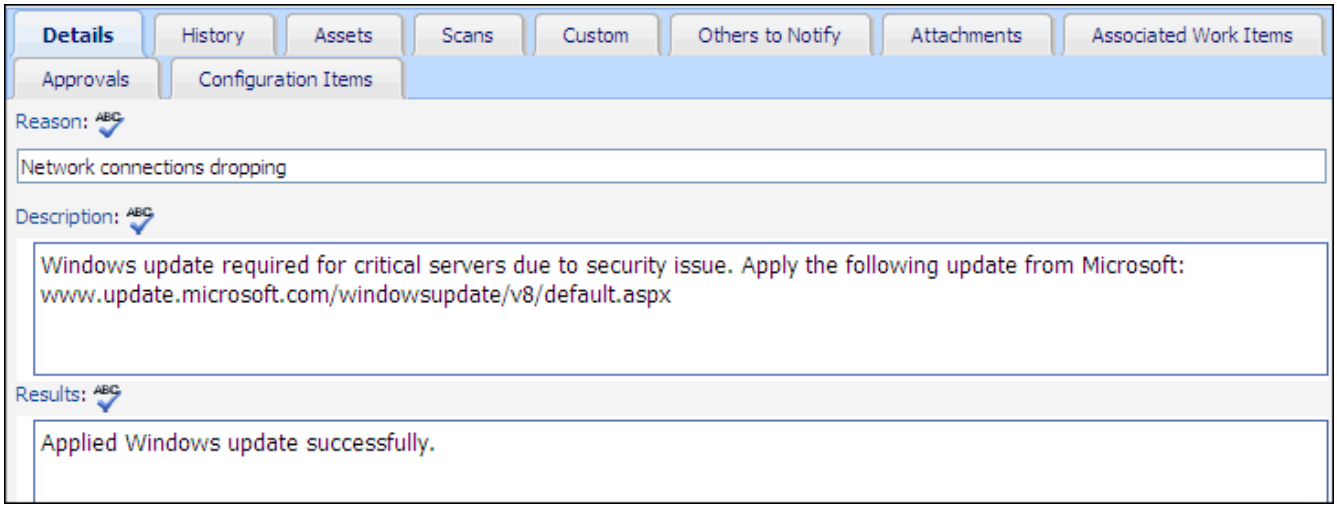


If configured for the template, the following fields are populated: Categorization, Reason, Description, Results, Assignee, Status, Change Type, Impact, Urgency, and Priority, SLA, Due Date Interval, Scheduled Implementation Date Interval, and Review Date Interval. Templates can be configured to append or replace the text in the Reason, Description, and/or Results fields. A script will display if associated with the categorization. Load balanced routing may be enabled.

Hierarchy templates can also be used to populate Change fields; for more information, see "Using Hierarchy Templates in the Change Screen" on page 347.

Entering the Reason and Description

Use the Reason field to enter the basis for the change and the Description field to enter a full description of the change.



If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Reason, Description, and Results fields; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

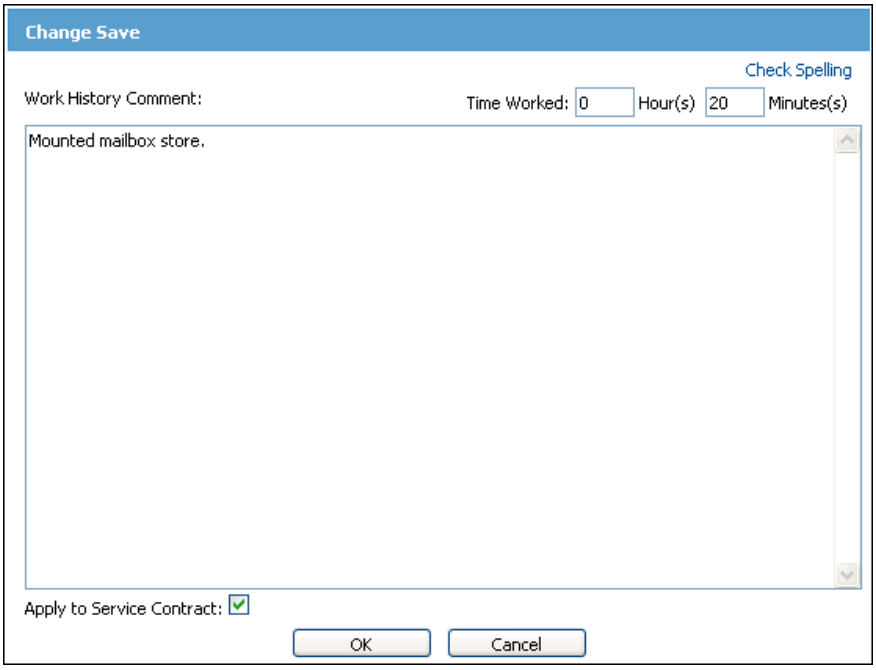
When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Saving the Change

Do one of the following:

- To save a change without closing the window, select Save from the Selection menu, press Ctrl+S, or click the Save icon.
- To save the change and close the window automatically, select Save and Close from the Selection menu or click the Save and Close icon on the toolbar.

If configured, the Change Save dialog appears:

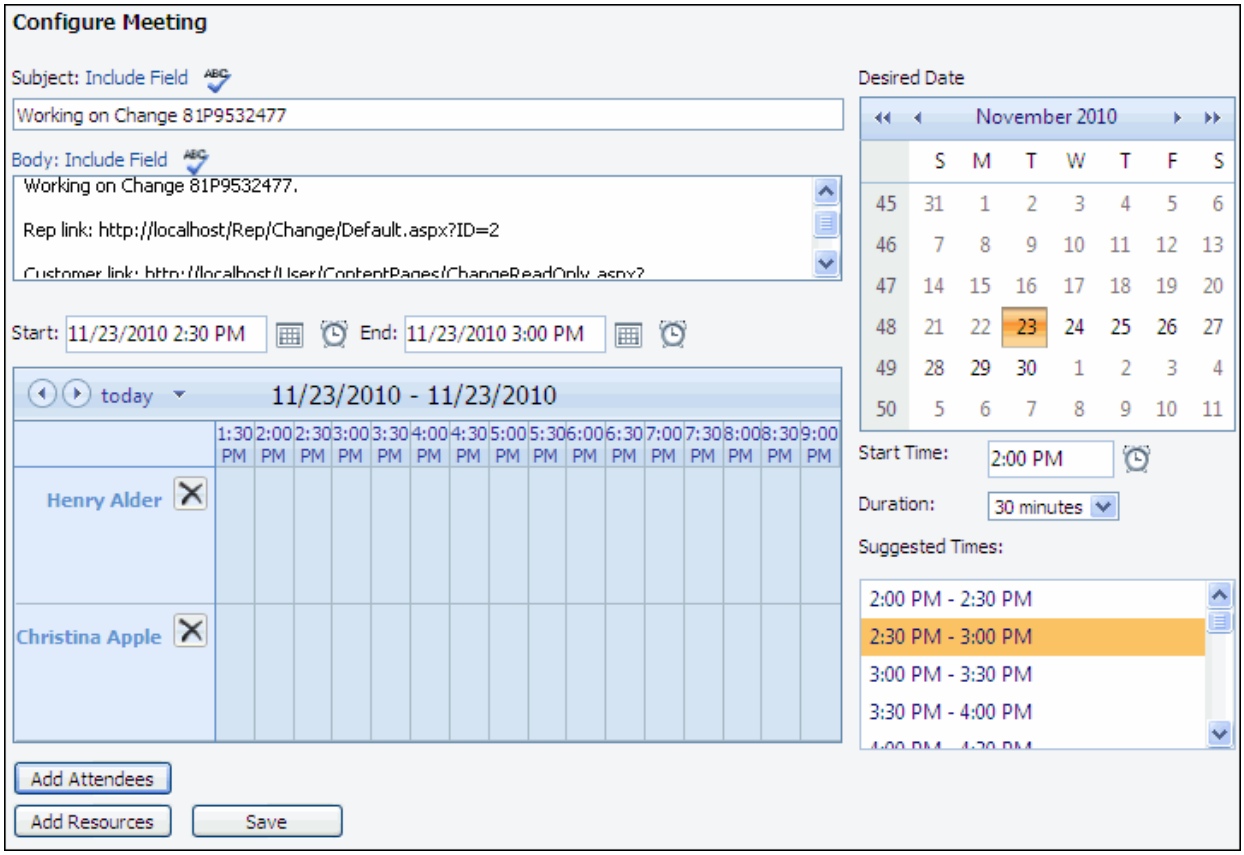


If applicable, enter the hours and minutes you worked on the change in the Time Worked field and enter information on any activities related to the change in the Work History Comment field. (You can also enter this information on the History tab.) If an hours-based service contract is in effect for the change, select the Apply to Service Contract checkbox to apply the amount entered in the Time Worked field to the contract.

Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Change screen after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules of meeting

attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.

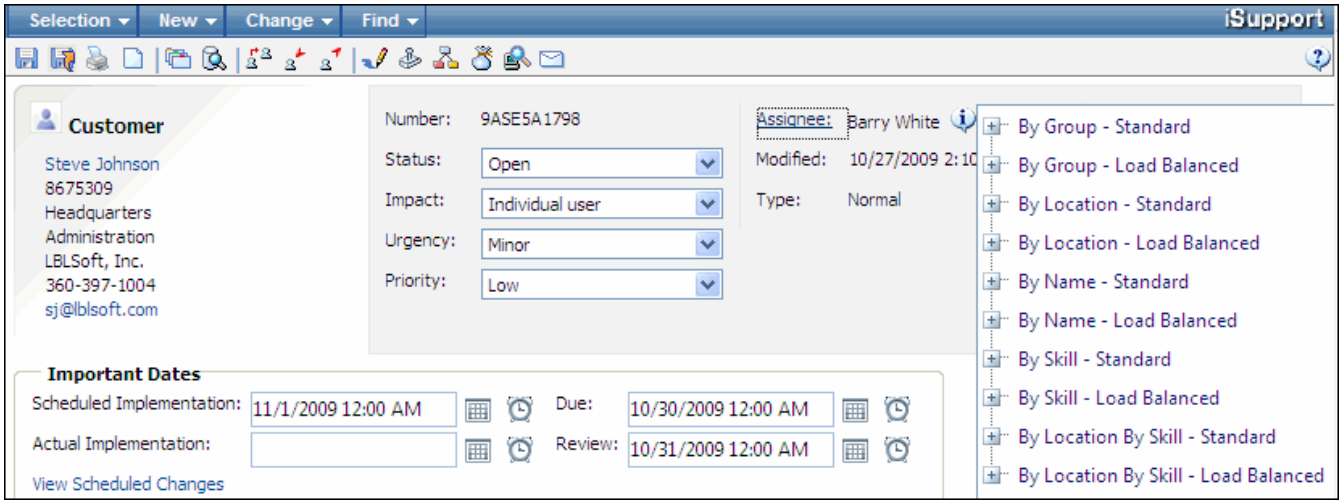


In the Configure Meeting screen, you can:

- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Change *<change number>*" will be included by default in the meeting entry along with a link to the record via the Desktop and End User Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees. The customer and assignee is added by default.

Selecting an Assignee

Click the Assignee link to select the support representative to assign to the change. The Routing Options dropdown appears; select the method to use for routing the change.



There are several methods of routing; some or all of these methods of routing may be available to you depending upon configuration settings.

- **Group Based/Standard:** A list of groups appears; when you select a group, a list of support representatives in the group appears for selection. (These groups are set up in Support Representative records.)
- **Group Based/Load Balanced:** The support representative with the lightest workload in a group is selected.
- **Location Based/Standard:** A list of all available support representatives in a selected location appears.
- **Location Based/Load Balanced:** The support representative with the lightest workload within a location is selected.
- **Name Based/Standard:** A list of all available support representatives appears.
- **Name Based/Load Balanced:** The support representative with the lightest workload is selected.
- **Skill Based/Standard:** A dialog will display listing the category levels selected for the change; select the level of categorization that exactly matches the categorization for which support representative skills should be searched. For example, if the change categorization is Hardware/Printers/Laser:
  - If you select Printers, those support representatives with a categorization of Hardware/Printers in their Support Representative record would be displayed for selection.
  - If you select Laser, those support representatives with a categorization of Hardware/Printers/Laser in their Support Representative record would be selected.
- **Skill Based/Load Balanced:** After you select the level of categorization for which support representative skills should be searched, a support representative is selected based on the

workload of the support representatives who have the exact match of the selected categorization in their Support Representative record.

- **Location by Skill/Standard:** A dialog will display listing support representative locations; after selecting a location, a dialog will display listing the category levels selected for the change. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representatives in the selected location with matching skills are listed for selection.
- **Location by Skill/Load Balanced**: A dialog will display listing support representative locations; after selecting a location, a dialog will display listing the category levels selected for the change. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative in the selected location with matching skills and the lightest workload is selected.

Load balanced routing involves weights based on priority; these weights are set up during configuration.

If a support representative has worked with a change and the change is reassigned, he/she will be bypassed until all available support representatives with the skill or in the group or location (depending on the method selected) have worked with the change.

If you selected **skill based standard routing**, select the level for which associated support representative skills should be searched. Support representatives with skills/categories in their Support Representative records that *exactly match that categorization level* will display for selection. If you selected a method with **load balanced routing**, the name of the person calculated to have the lightest workload will appear.

Routing to Yourself

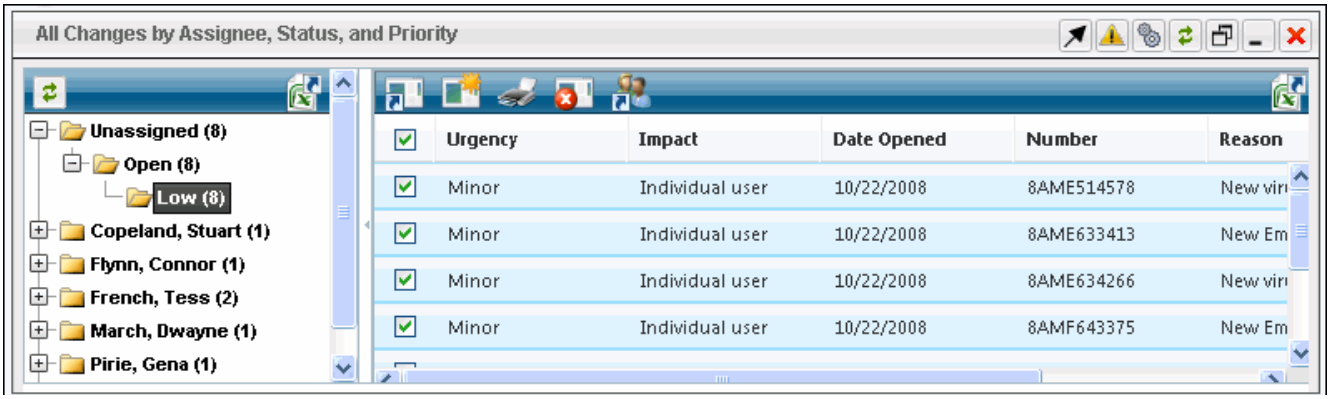
To route a change to yourself (for example, if changes are first routed to a queue), click the Route to Self icon. This bypasses routing dialogs. Your primary group will be used. If you wish to change your group, you'll need to use the Change Assignee's Group option or the routing dialogs (via the Route icon or Assignee link).

Entering Routing Comments

Once you click Finish, if routing notifications are enabled in configuration for reassignment, the Routing Comment dialog appears for you to enter a note to be included in the notification email to be sent to the new assignee. The note will be on the first line of the email.

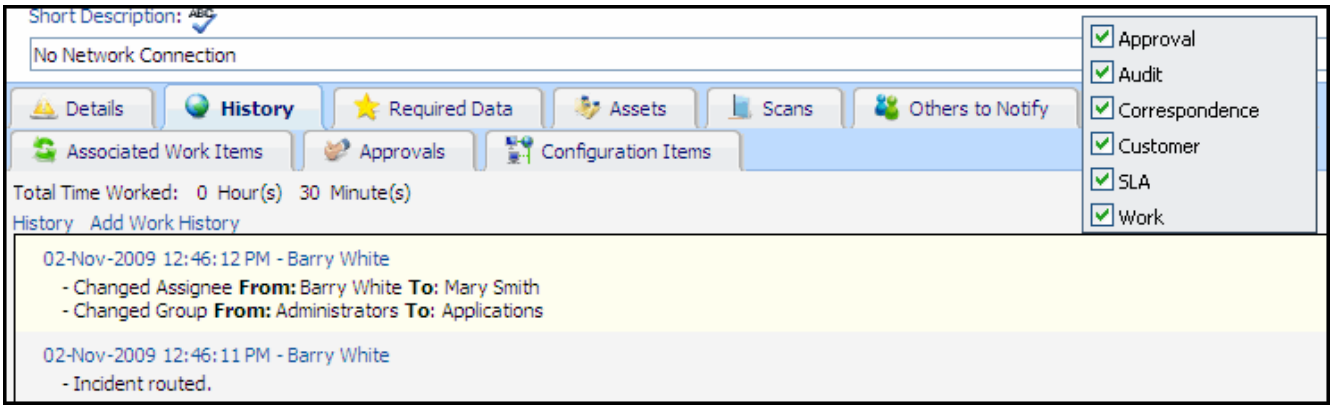
Routing Multiple Change Records via the Desktop

You can route Change records from views on the Desktop. Select the Change records to route and click the Route icon. The routing dialogs will appear. If load balanced routing is used, the selected Change records will be distributed evenly to the available support representatives in the selected group, location, or all (if using name-based routing). The same comment will be applied to all routed Change records.

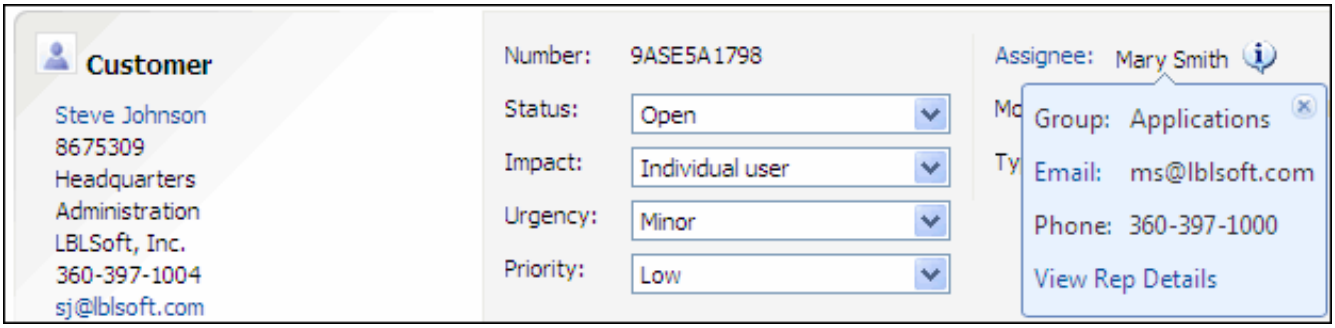


Viewing Routing Information

The Audit History entries on the History tab include the date and time of the route.

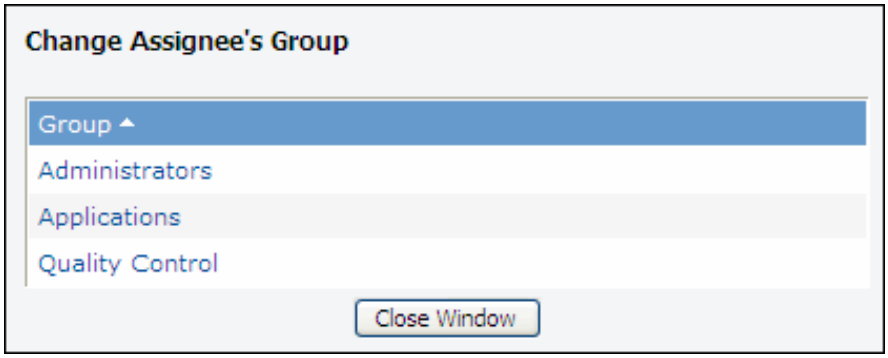


To view the assignee's contact information, skills, and groups, click the View Rep Details link after clicking the icon next to the Assignee field. You can send an email or page from the View Rep Details dialog.



Changing an Assignee's Group

If an assignee is a member of more than one group, you can select Change | Change Assignee's Group to change the assignee's group membership for a change.

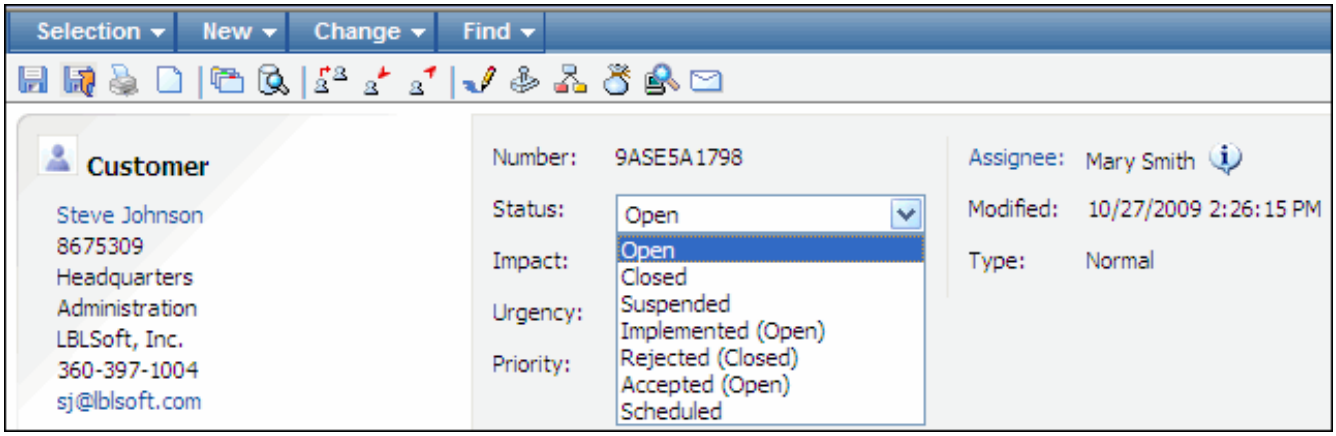


Selecting the Status, Impact, Urgency, and Priority

Selecting the Change Status

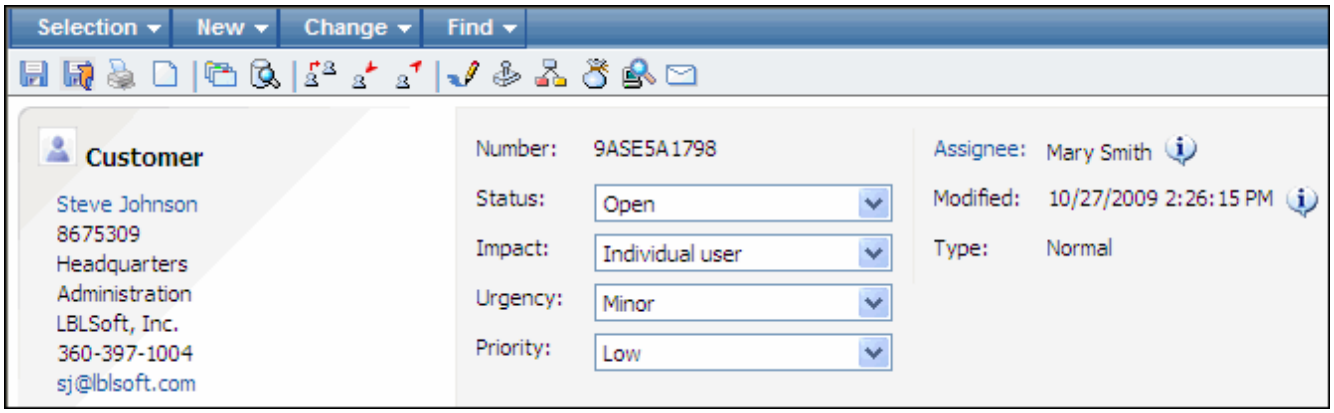
Use the Status field to designate the change status. There are three basic status levels: Open, Closed, and Suspended. Different labels can be set up in the Configuration module for those status levels. Statuses may be assigned via the Approval features if configured.

The Suspend status will stop escalation. When the status is changed to Open, escalation will continue, taking into account the time that has elapsed since the change was suspended. (You can display a list of suspended changes using views on the Desktop.) Select the Closed status to close the change.



Selecting the Impact, Urgency, and Priority

Prioritization encompasses urgency (based on the amount of time a resolution is needed) and impact (usually the number of users affected). The Impact and Urgency values are defined and associated with the priority levels of Low, Medium, High, and Emergency in the Configuration module; these defined values will be available in the Impact and Urgency fields for selection. The mapped priority will appear as default but all priority levels are available if permissions are configured for you to change the priority.

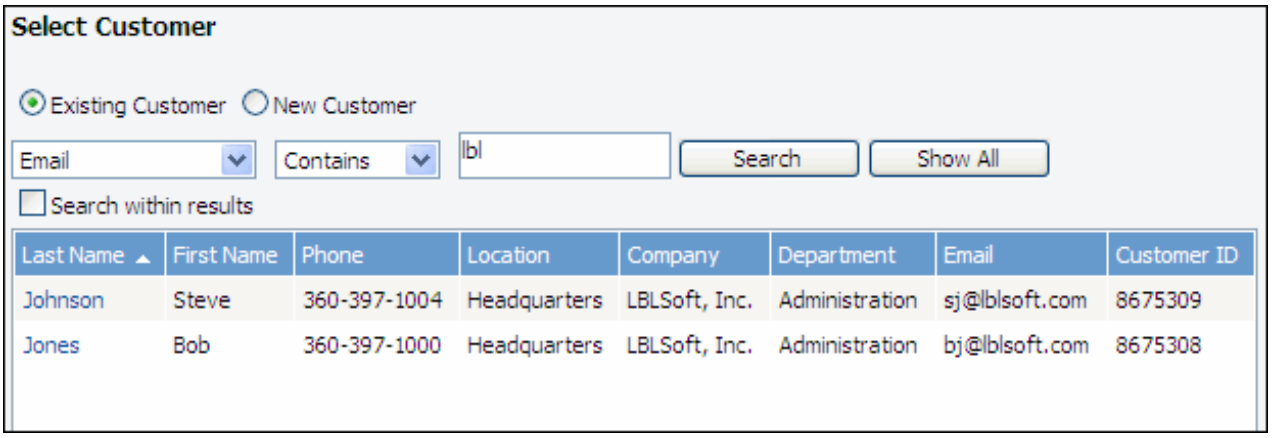


Examples of Impact, Urgency, and Priority mappings include:

Impact	Urgency	Priority
Individual	Minor	Medium
Department	Major	High
Company-wide	Minor	Medium
Company-wide	Critical	Emergency

Selecting a Customer

If applicable, click the Customer icon to assign a customer to the change. The Select Customer dialog will appear for you to select an existing customer or create a new Customer Profile record. Click the Show All button to display a list of all customers. You can search based on last name, first name, phone, location, email, company, department, and customer ID and perform another search on the results if needed.



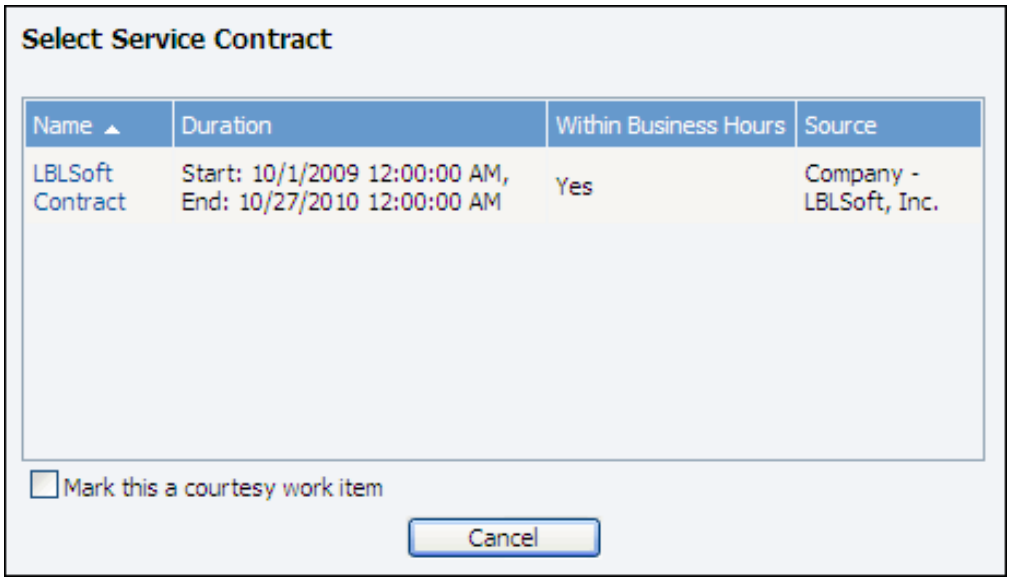
To search for a customer, select the title of the column in which your search should be performed and then select the type of search criteria (Contains, Starts With, Ends With, Is). Enter the search value and click Search. When the number of entries returned after a lookup exceeds 100, the results are displayed in pages of up to 100 entries. You can click on a number to quickly jump to a page.

The selected column title is retained in a browser cookie; the next time you perform a search, the selection will display by default.

To select a customer, click on the applicable name. The customer's name and applicable SLA appear. Click the customer's name to display the customer's Customer Profile record.

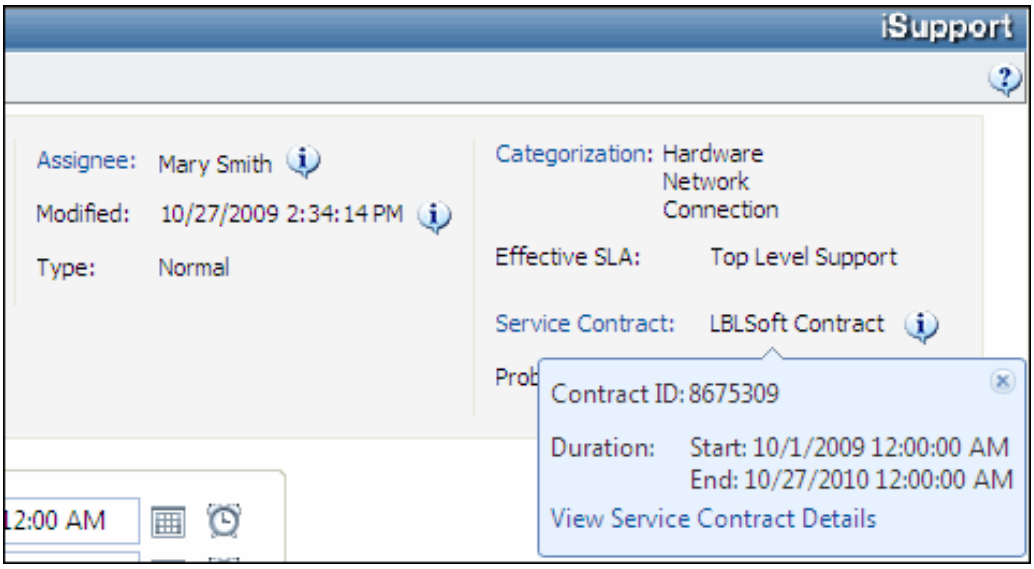
Selecting a Service Contract

iSupport's Service Contract functionality tracks and restricts incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe. If Service Contract functionality is enabled in configuration, and a service contract is associated with the selected customer, customer's company, or customer's asset selected for the change, the following dialog will appear:



The Mark This a Courtesy Work Item checkbox will appear if enabled in configuration. Select the service contract to which the change should be applied or select the Mark This a Courtesy Work Item checkbox if you do not wish to count the change against a contract. If you selected a contract, the change will be counted against it when the record is initially saved.

After selecting a contract, the contract name appears in the Service Contract field. You can click the Information icon to display the contract ID and duration. You can click the View Service Contract Details link to display the contract in the Service Contract screen.

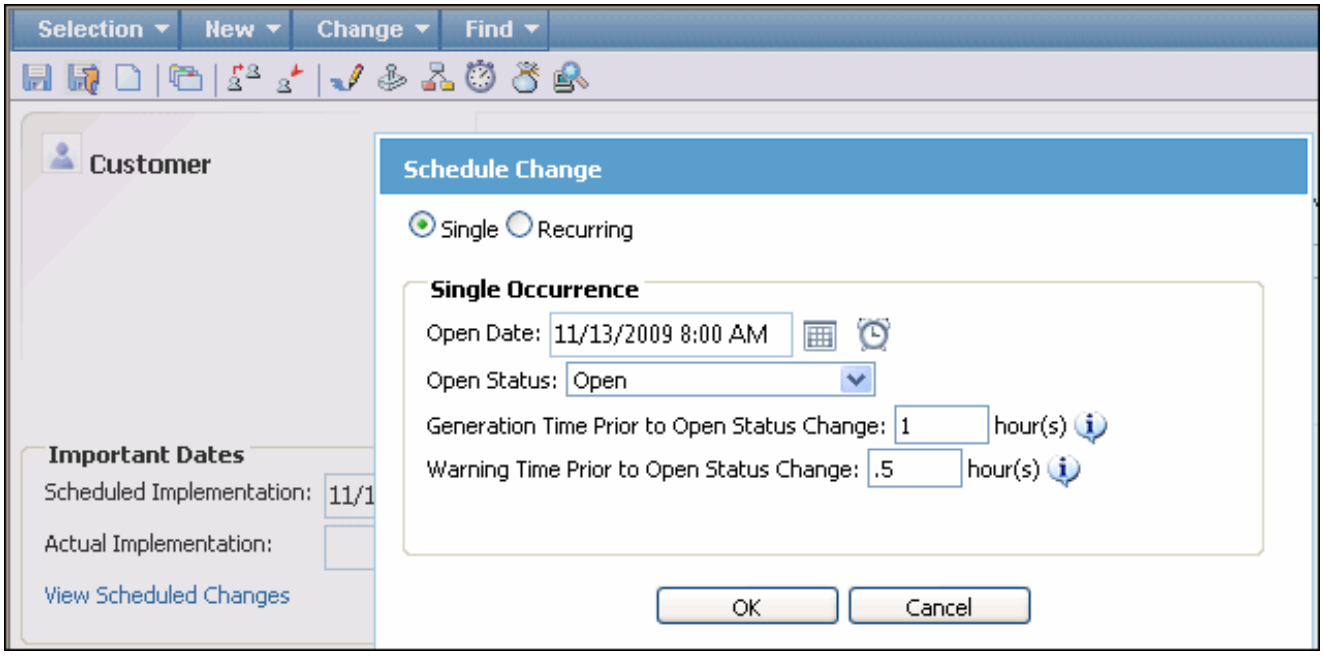


Scheduling Changes

You can schedule one or more changes to be created with an open status at a future date/time. You can schedule a single occurrence change or, if configured, a recurring set of changes. Scheduled changes are assigned the open status by the Change Scheduling agent. You must complete the scheduling dialog before the change has been saved.

You can generate scheduled Change records prior to the time at which the status changes; when this occurs, the scheduled changes have a Scheduled status and all fields can be updated except the Status field. The SLA will not go into effect. When the specified open date/time is reached on a scheduled change, the status will change to the specified open status and the SLA will go into effect using the open date/time.

In the Change screen, select Change | Schedule Change or click the Schedule Change icon to display the Scheduling dialog.



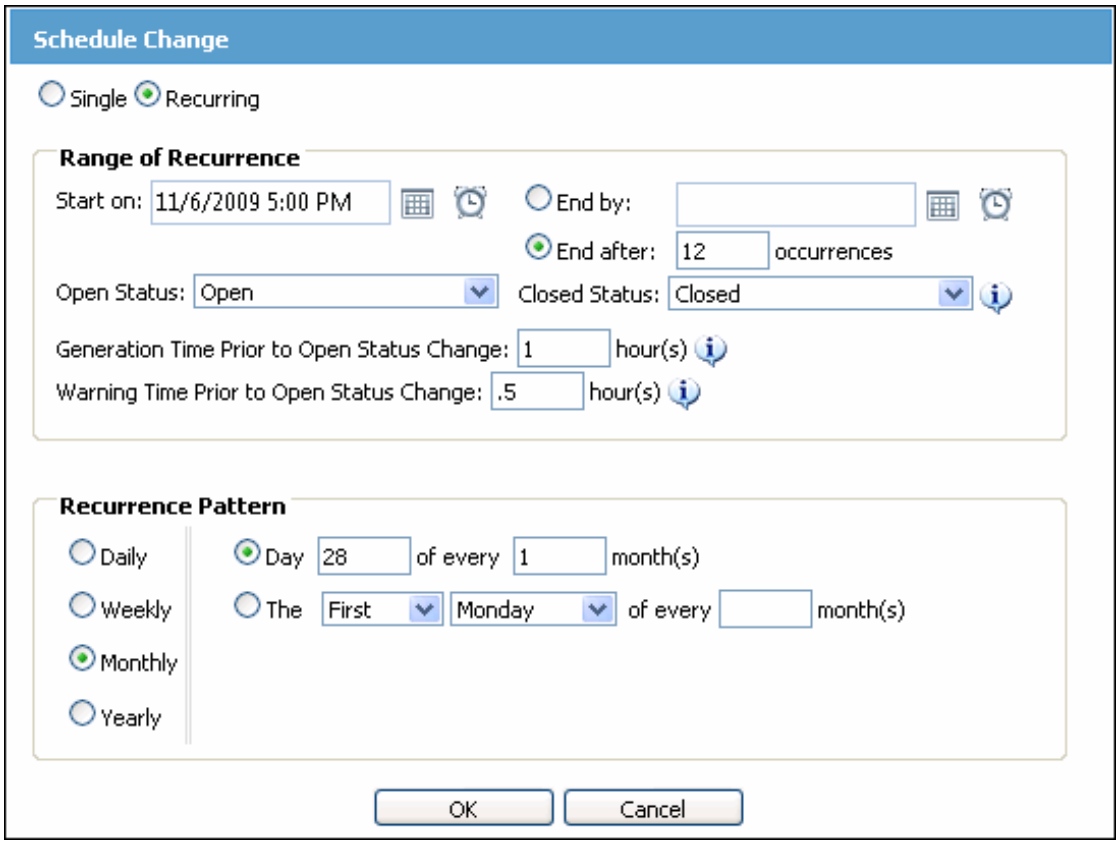
Scheduling a Single Occurrence Change

In the Open Date field, enter the date and time at which the status should be changed to an Open status, and use the Open Status field to select the status. When the open date/start time is reached, the scheduled change will become a normal open change and the SLA will go into effect. No new changes are created for a single occurrence schedule.

If you wish to create the change prior to the open status change, select the amount of time in the Generation Time Prior to Open Status Change field. The change will have a status of Scheduled until the date and time in the Open Date field. (Note that the SLA will not go into effect until the open date and time.) To send a warning notification a specified amount of time before the open status change, select the time in the Warning Interval Prior to Open Status Change field.

Scheduling Recurring Changes

If configured, you can select Recurring to create a new change on a repeated basis at a specified date/time. When changes are created on a recurring basis, the change on which you set the schedule will close automatically when the final change is created from it.



In the Start Date field, enter the date/time at which the status should be changed to an Open status, and use the Open Status field to select the status. If you wish to create the changes prior to the open status change, select the change creation time in the Generation Time Prior to Open Status Change field. Notifications may be configured to be sent at that time. The changes will have a status of Scheduled until the date and time in the Open Date field. (Note that the SLA will not go into effect until the open date and start time.) To send a warning notification a specified amount of time before the open status change, select the time in the Warning Interval Prior to Open Status Change field.

Selecting the Date Range and Close Status

In the Start Date field, select the date on which the first change should be created. Use the End After field if you wish to create a specified number of changes; use the End By field if you wish to end the change creation schedule on a specified date.

When the final change is created, the change on which you set the schedule will close; use the Closed Status field to select the Closed status to assign to it. Notations are included on the History tab on all changes created from the schedule. Once the originating schedule is closed, you can view it via one of these notations in a change created from the schedule.

Selecting the Recurrence Pattern

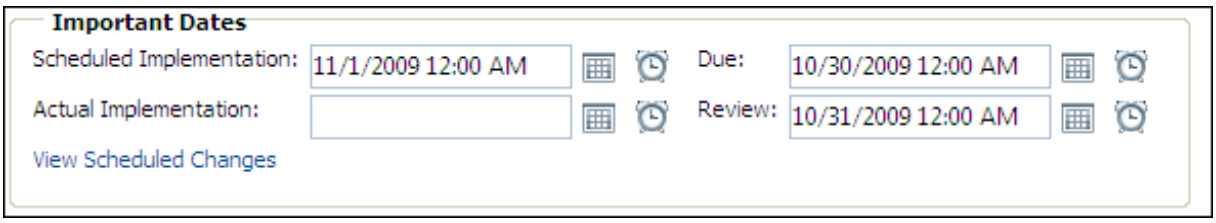
Use the Recurrence Pattern section to specify how changes should be created on a repetitive basis:

- Select Daily to create a change every weekday or specified number of days.
- Select Weekly to create a change on a specified weekday (Sunday-Saturday) for an interval of a specified number of weeks.
- Select Monthly to create a change for an interval of a specified number of months. Then select the day of the month on which each change should be created.
- Select Yearly to create a change yearly on a specified month and date or specified day of the week on a specified month.

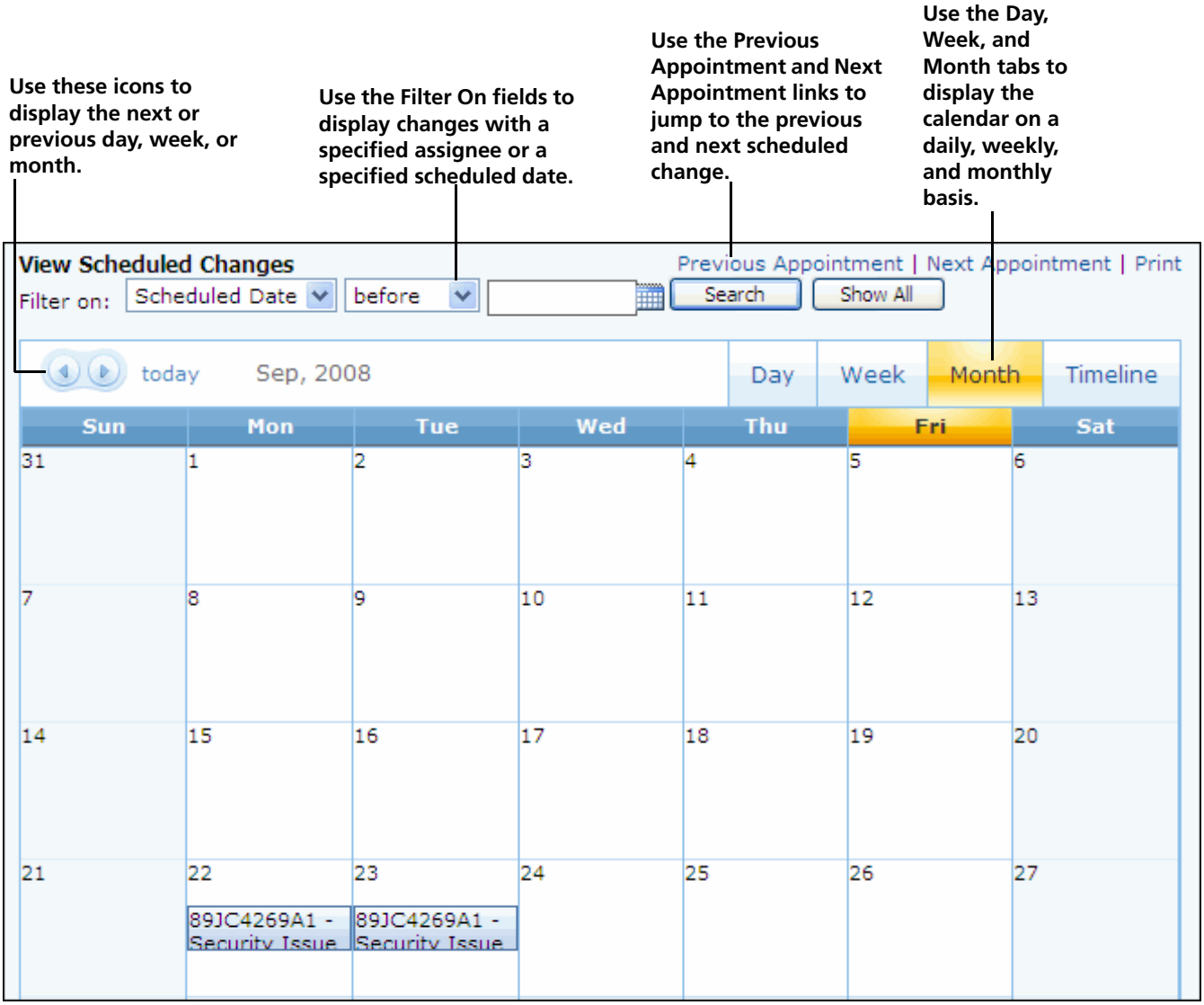
Entering Important Dates

Use the Scheduled Implementation, Actual Implementation, Review, and Due Date fields to enter the important dates/times applicable to the change. Dates may appear in these fields by default if configured.

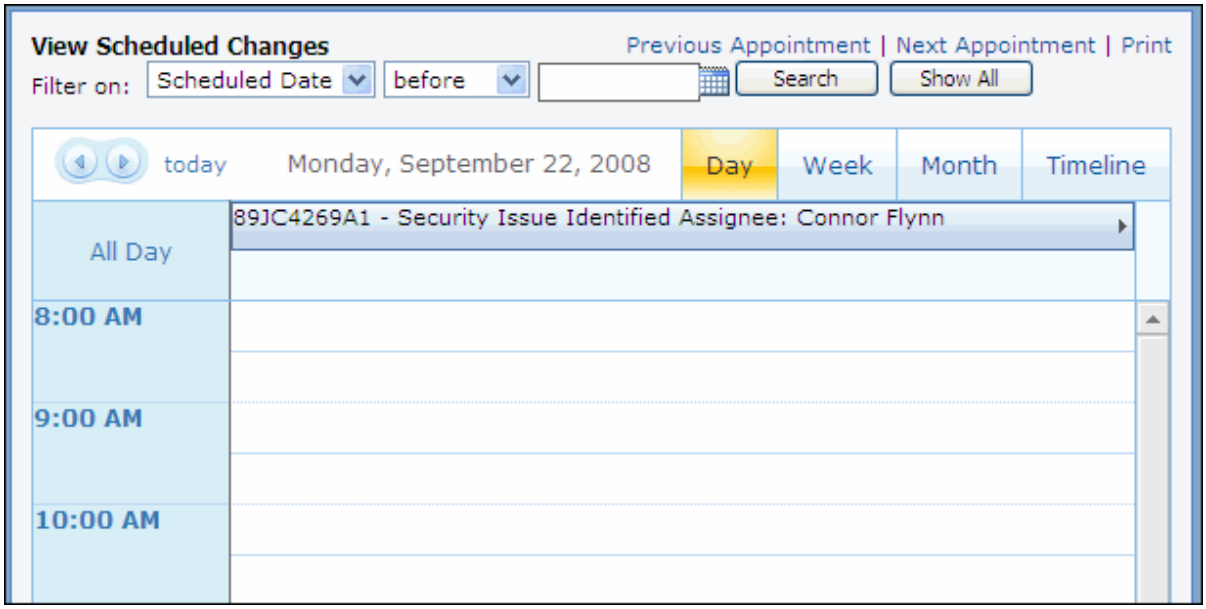
The Scheduled Implementation, Review, and Due Date fields are tied to notification functionality; warning notifications may be sent to configured recipients a specified number of hours before the date entered in these fields, and notifications may be sent to configured recipients after the date entered in these fields has passed.



Click the View Scheduled Changes link to display a calendar that includes the Change records with a date in the Scheduled Date field for the current month. Click on an entry to open the Change record.

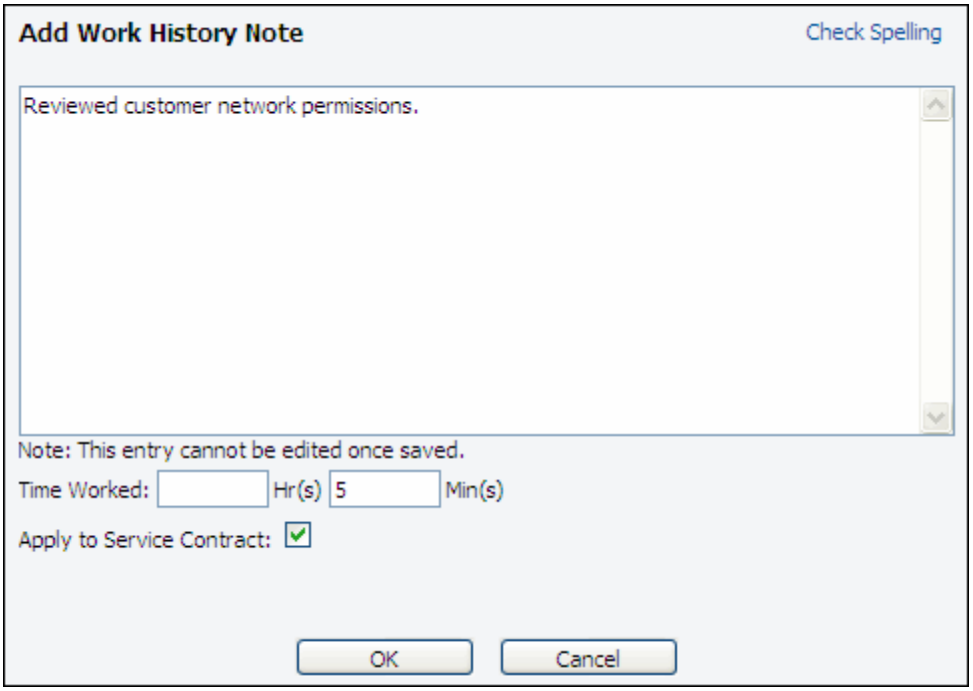


The Day view is shown below.



Entering and Viewing History

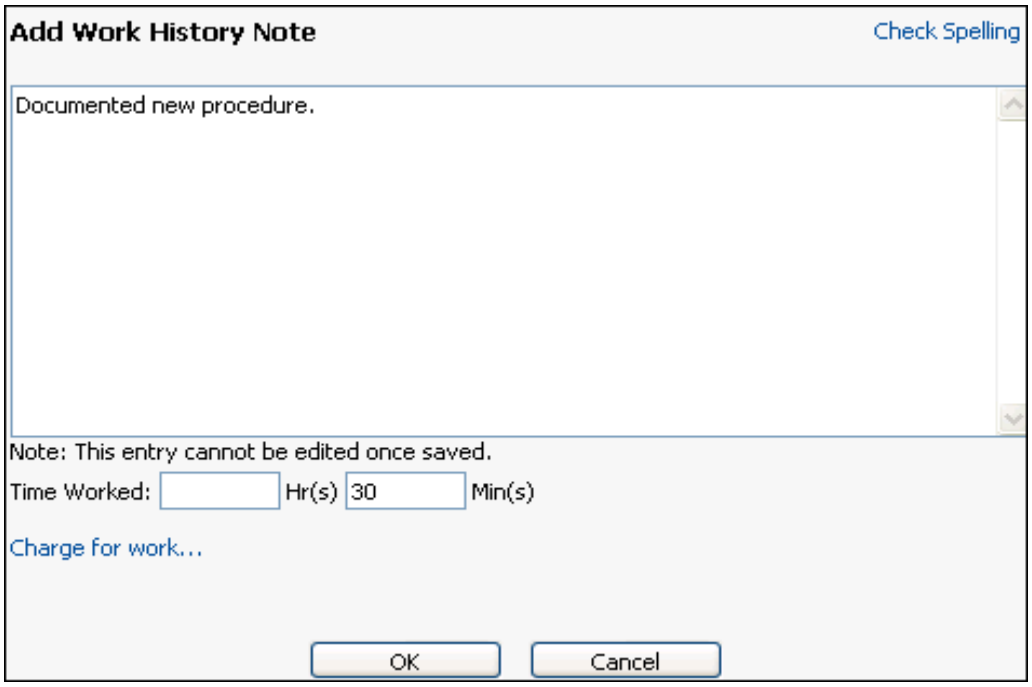
To enter information on any activities related to a change, click the Add to Work History icon or the Add Work History link on the History tab. For example, you can document customer contacts or conversations with customers or support staff. This field is useful when routing a Change record to another support representative because it allows them to see the work that has been performed. If configured, you may be required to make an entry in the Time Worked field after entering work history.



If an hours-based service contract is in effect for the change, select the Apply to Service Contract checkbox to apply the amount entered in the Time Worked field to the contract.

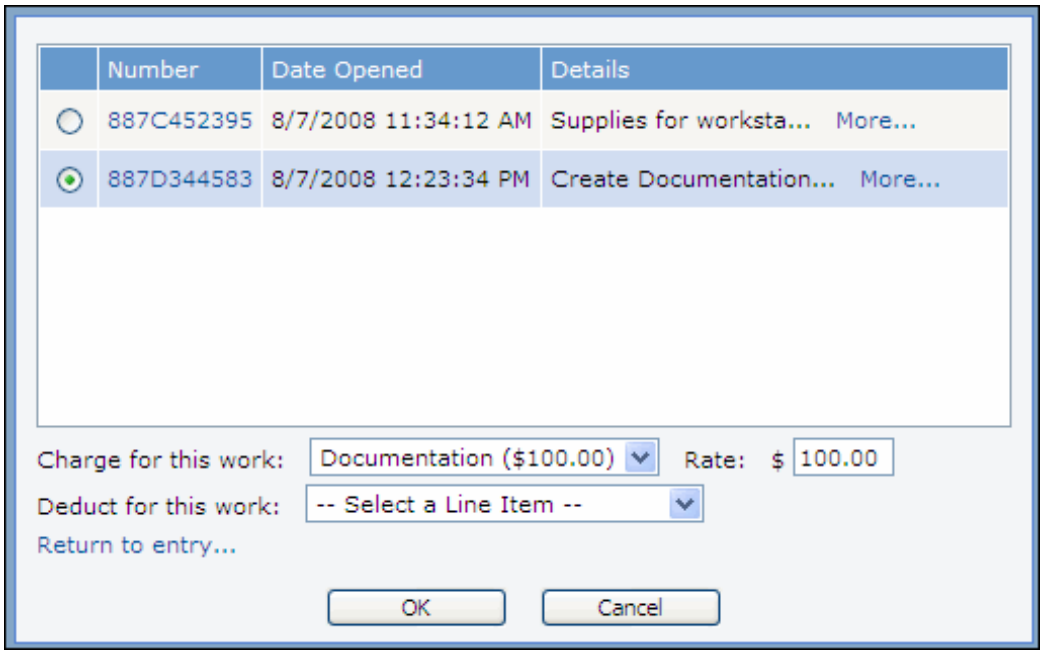
Charging Time Worked Against Purchase Orders

If Purchasing functionality is enabled, when entering time worked in the Change screen, you can add a charge (an amount of time worked multiplied by a rate) as a separate line item or use a charge to decrement an existing line item on an associated purchase order. After entering the time worked, click the Charge for Work link.

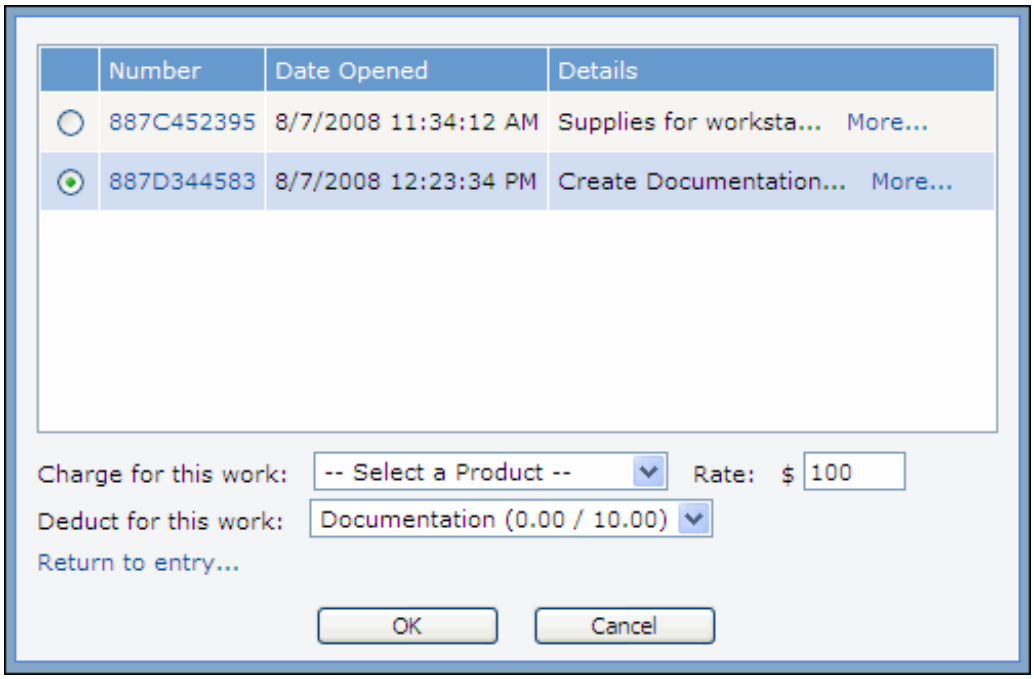


The purchase orders associated with the change appear; select the purchase order for which the charge should be applied. Then:

- To **add a separate line item charge** to the purchase order (increasing the total amount), choose the product from the selected purchase order in the Charge For This Work field. In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog. Click OK

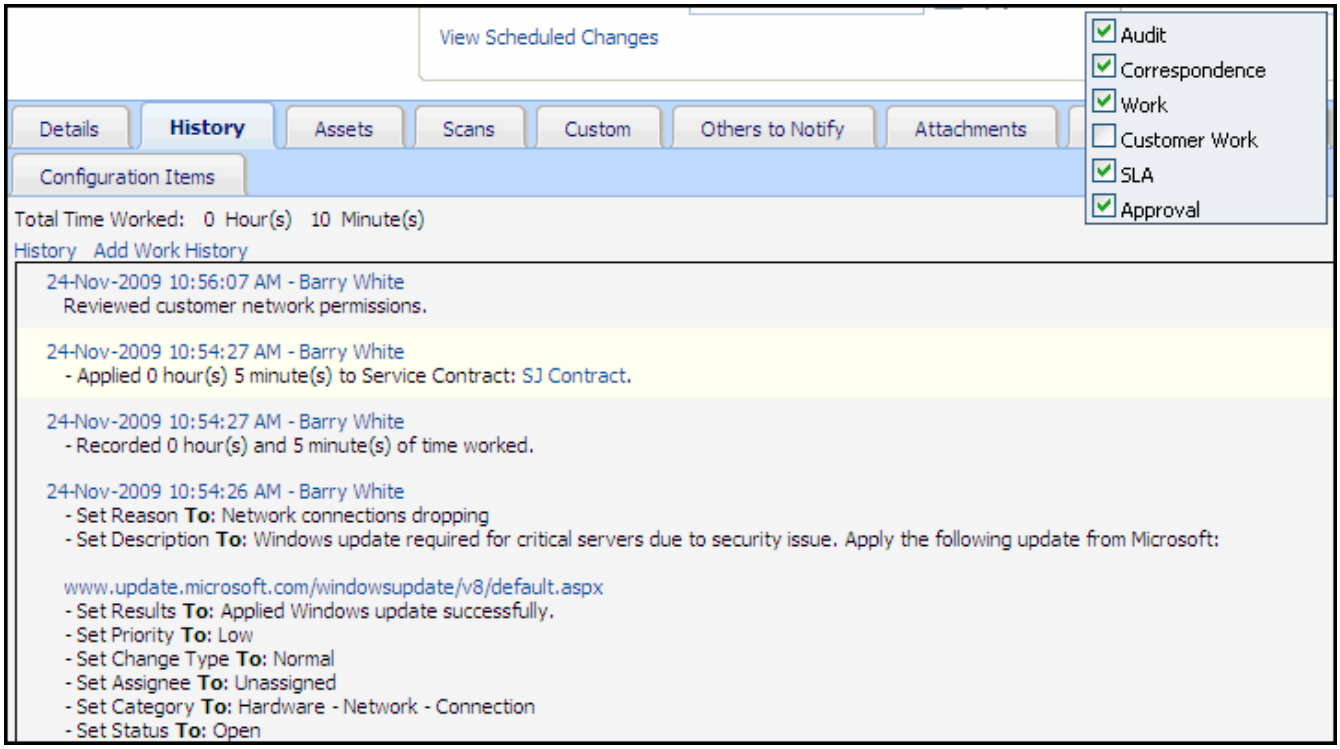


- To **use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order and click OK.



Using the History Tab

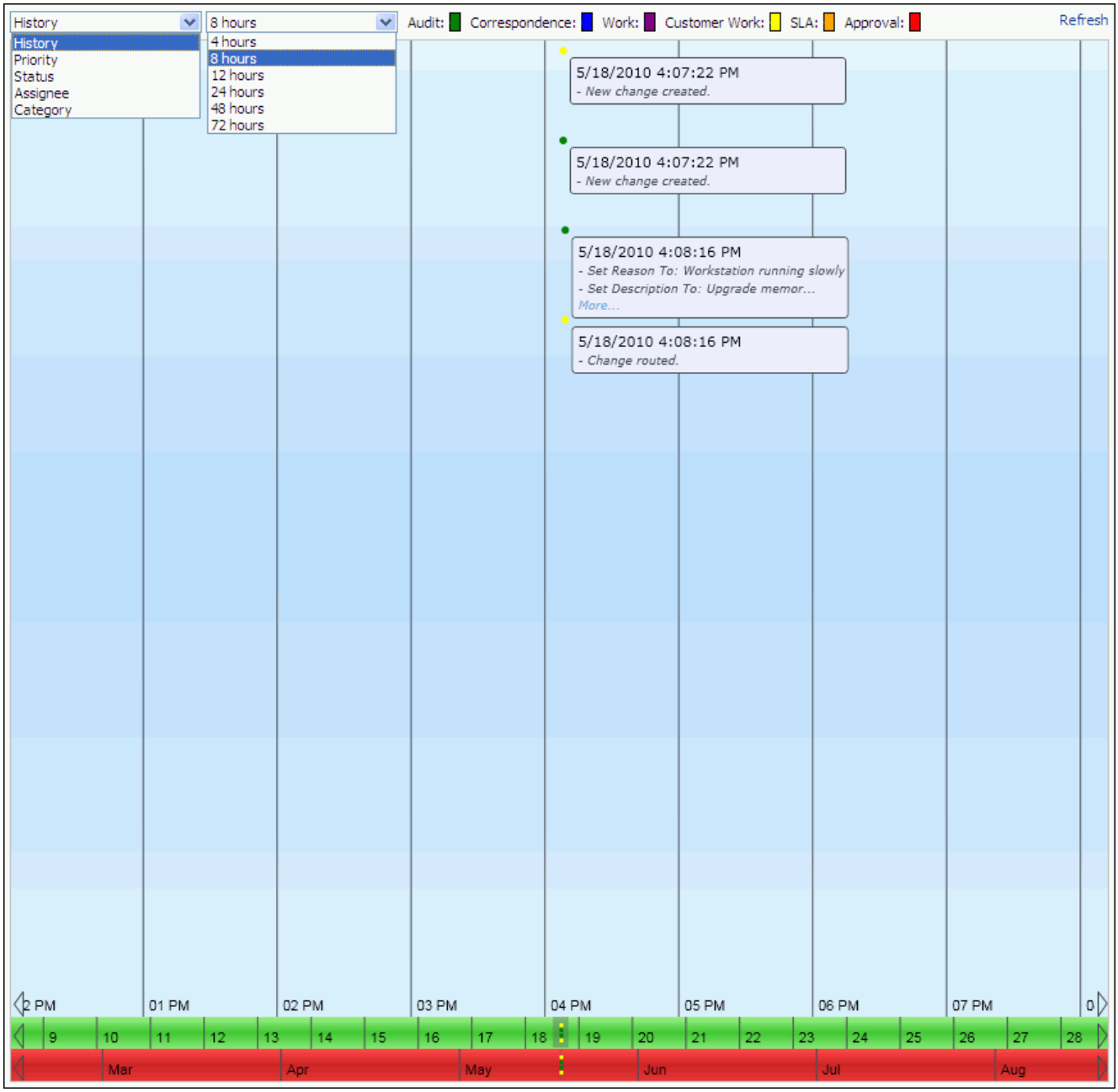
Use the checkboxes on the right side of the History tab to view notations on all Change actions.



- To view a notation of every action performed on the change including the date, time, and author stamp, select the Audit checkbox.
- The Correspondence checkbox displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen.

  If configured, an email sent to the inbound email account contains an existing incident, problem, or change (if enabled) number in the subject line or body, the matching record may be updated by including a notation in the Audit History field with a correspondence link to view the email and any attachments. An incident may be updated if an existing incident number is included in the subject or body of an email. Note that a space must be included before and after the number in order for the record to be updated. If configured, an acknowledgement email may be sent to the sender, and an email may be sent to the assignee of the record.
- To view Work History entries, select the Work checkbox.
- To view a notation of every approval action, select the Approval checkbox.
- To view all events such as including initial SLA settings upon change creation, notifications sent, and reassignments and priority changes due to escalation, select the SLA checkbox.

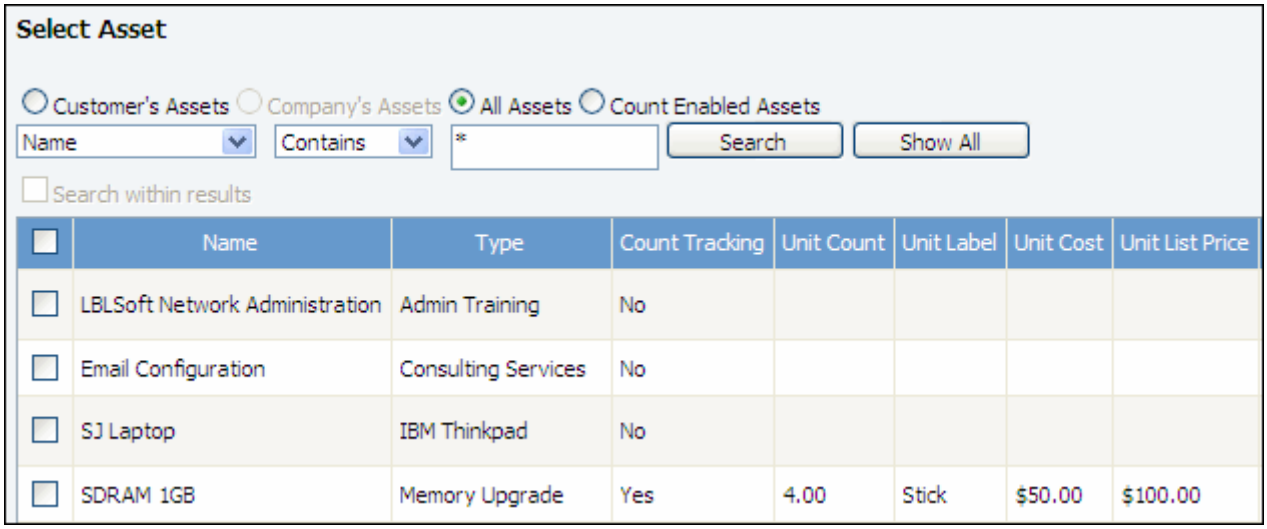
Click the View Timeline link on the History tab to display historical change events on a timeline. Use the dropdown fields to select the types of entries to display and the timeline increments. You can use your mouse to scroll the green hour bar and red month bar at the bottom of the screen.



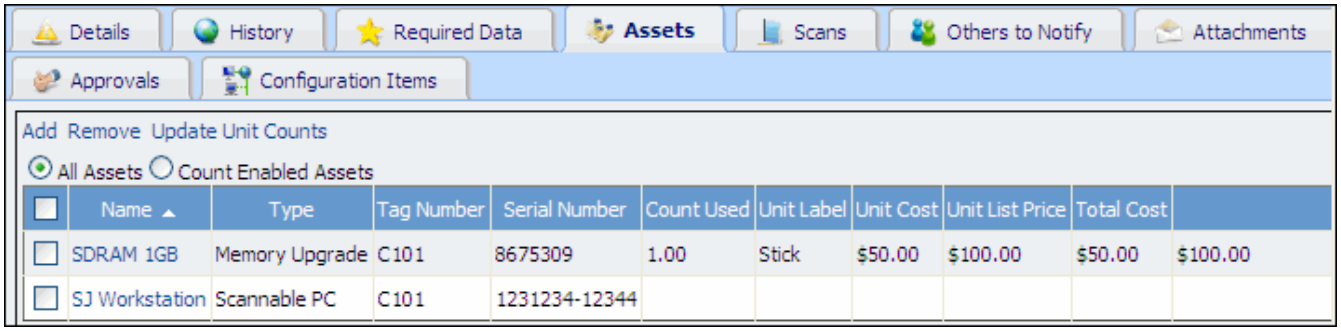
Associating Assets

If asset functionality is enabled during configuration and the Assets tab is configured to appear in the Change screen, you can associate assets with a Change record. If configured, notifications can be sent to owners of the associated assets. To associate an existing asset, select Change | Select Asset, click the Add Asset icon, or click the Add link on the Assets tab. You can select New | Asset to create a new asset record from the Change screen but you'll need to select Change | Select

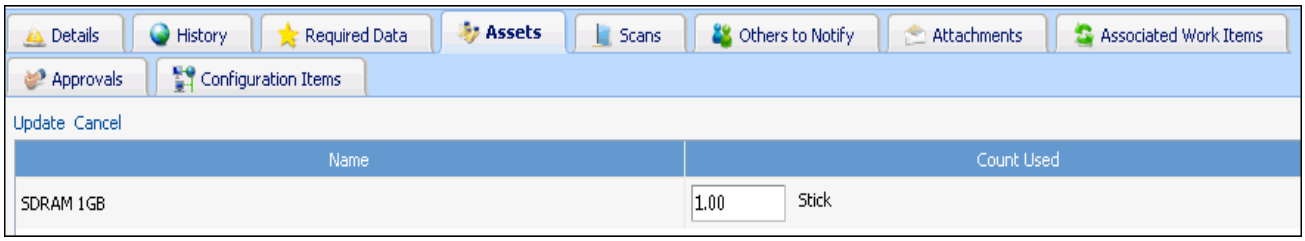
Asset to associate it. You can display the customer's or company's assets, all assets, or assets with an asset type that has count tracking enabled.



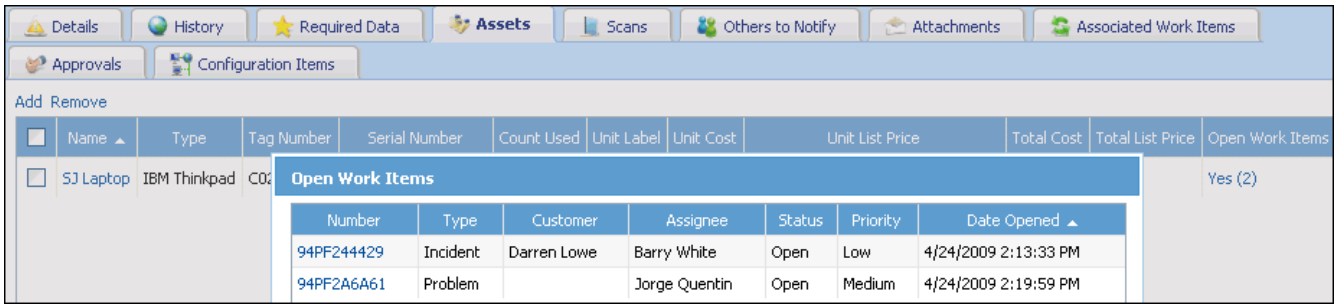
Asset fields will appear if one asset is selected; a list will appear if more than one asset is selected.



When count tracking is enabled for asset types, the Unit Count, Unit Label, Unit Cost, and Unit List Price fields will appear in the Asset screen if the type is selected. When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can click the Update Unit Counts link, enter the number of units used, and decrement the unit count. A notification can be configured to be sent when a specified count is reached.



If the asset has other open incidents, problems, or changes associated with it, “Yes” will appear along with the number of open work items. Click the link to display a list of those items.



Performing and Associating Asset Scans

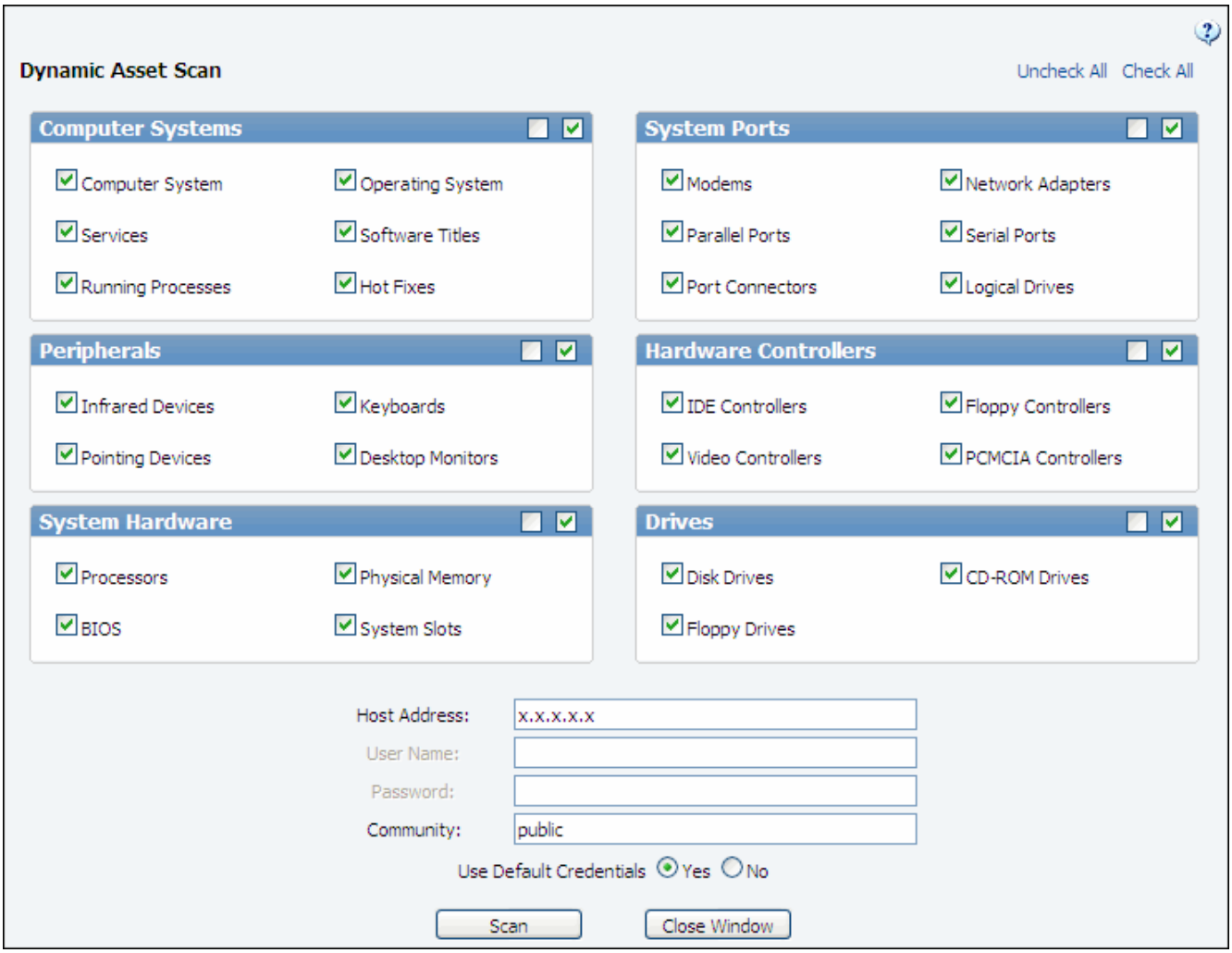
Asset scans collect hardware, software, and service details automatically on a computer (Windows 98 and above or any other WMI-compliant machine; WMI must be installed and active) and on non-Windows devices on your local subnet. There are two types of scans in iSupport:

- You can perform a **dynamic asset scan** from the Desktop and the Incident, Problem, Change, and Asset screens.
- **Inventory asset scans** can be scheduled and run automatically according to an Inventory Scan Definition, which defines the hosts (remote machines) to be scanned during a specified start time and duration. Inventory scans include a more comprehensive set of data than dynamic scans.

To perform the scan, you will need to enter IP address or NetBIOS name of the machine to be scanned. The login used to run the scan must be in the Administrators group on the machine to be scanned. If you do not have this login, it can be set during configuration and accessed automatically by iSupport.

To initiate a scan in the Change screen, click the Scan icon, select New | Scan or click the New Scan link on the Scans tab.

The Dynamic Asset Scan dialog appears:



In the Dynamic Asset Scan dialog, select the types of data to include in the scan. To select all checkboxes in a section, use the icon; to clear the checkboxes in a section, use the icon. Use the Uncheck All and Check All links for all checkboxes.

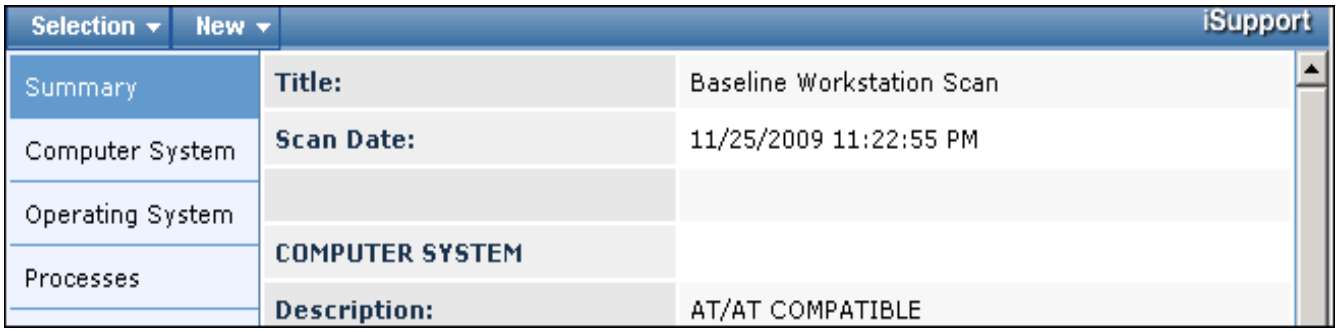
In the Host Address field, enter the identifier of the system to be scanned (IP address, machine name to scan in the current domain, or domain\machine name).

In the User Name and Password fields, enter the user name and password for accessing the machine to be scanned; this login can be set up during configuration and accessed automatically by iSupport.

If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device) in the Community field. Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".

When finished, click the Scan button.

After the scan has finished, the Scan Results dialog appears as shown in the example below. Use the links on the left to quickly move to a certain portion of the scan. Choose Save on the Selection menu to save the scan and enter a title.

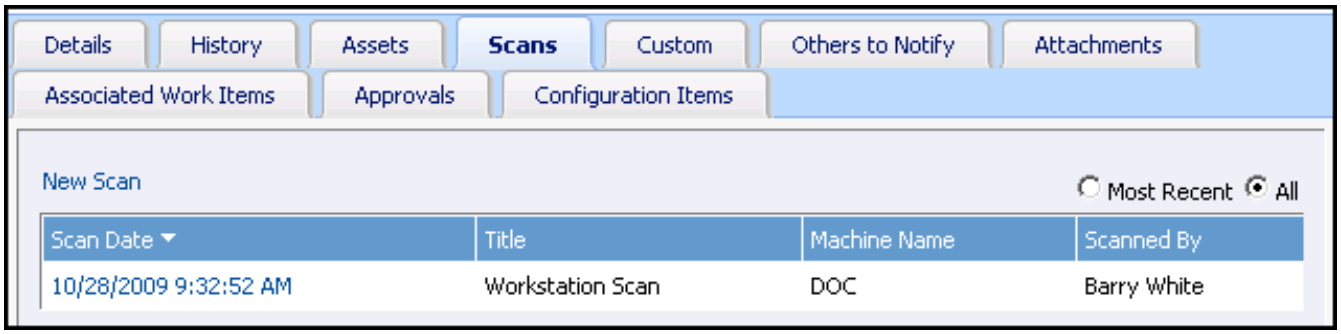


Choose Attach to Change on the Selection menu to attach the scan to the current change. If an asset with a scannable asset type (set up during configuration) is associated with the current change, you can choose Attach to Asset and Attach to Change and Asset on the scan's Selection menu to attach the scan to the asset record and the current change. You can detach scans later if needed.

If you have sufficient permissions, you can generate and save a side-by-side comparison of two scans (dynamic or inventory). From an existing scan, choose New | Scan Comparison, and select the second scan. You can save and title the scan comparison.

If the Scans tab is enabled to appear, the Most Recent radio button on the Scans tab in the Change screen displays the most recent dynamic scan attached to the change, and most recent inventory and dynamic scan attached to any scannable asset selected on the Assets tab (if the Assets tab is enabled to appear). The All radio button displays all dynamic scans attached to the change, and all inventory and dynamic scans attached to any scannable asset(s) selected on the Assets tab.

To detach a scan, click on the Scan Date link to open it and choose Detach from the scan's Selection menu.



Completing Custom Fields

The fields on the customizable tab are used to enter information specific to your company. The name of the tab is specified during configuration. Custom fields can be configured to:

- Always appear on this tab
- Appear when a certain category is selected

You may be required to enter information in these fields. If a change is recategorized, data saved in custom fields is retained and the custom fields associated with the newly-selected category set are added.

Specifying Others to Notify

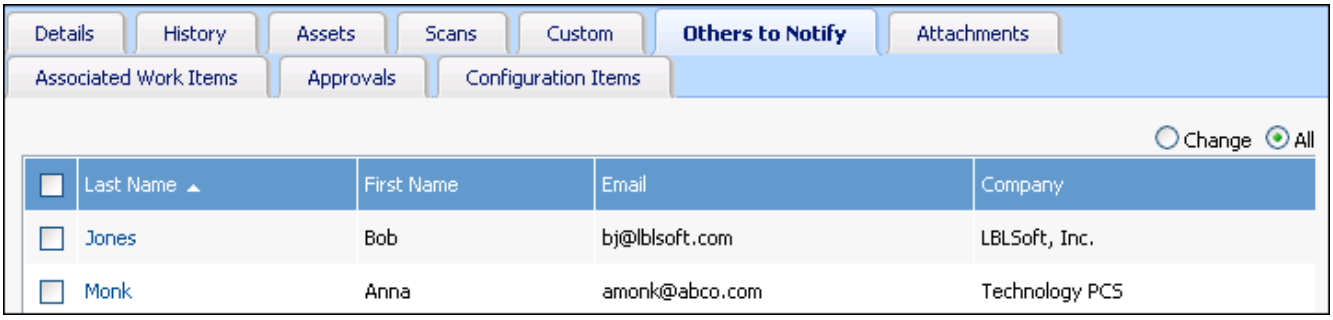
If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and/or support representatives that are not directly involved in the Change process to be sent Change event notifications and other correspondence. Those on Others to Notify lists can be designated in configuration to be notification recipients for the following Change events:

- Initial save of a Change record by a support representative or customer
- A Work History entry is added
- The change is routed
- Results are recorded
- The date in the Scheduled Date field is approaching or has been exceeded
- The date in the Review field is approaching or has been exceeded
- The date in the Due field is approaching or has been exceeded
- The Closed status is selected

In iSupport, an Others to Notify list can be set up for an individual customer, all customers in a company, a category set, an individual incident, an individual problem, and an individual change.

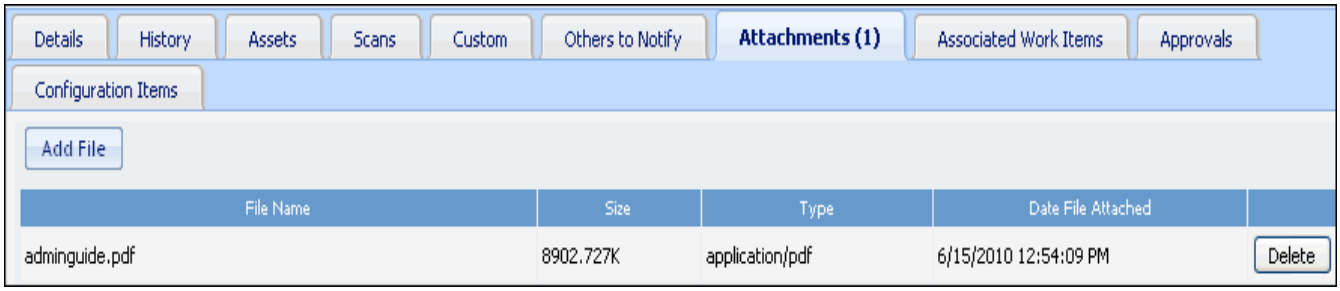
To add a customer or support representative to the change-specific Others to Notify list, click the Add link on the Others to Notify tab. Use the Remove link to delete anyone from this list.

The All radio button will also include the Others to Notify list for the selected categorization. You cannot modify entries in this list via the Change screen.



Attaching Files

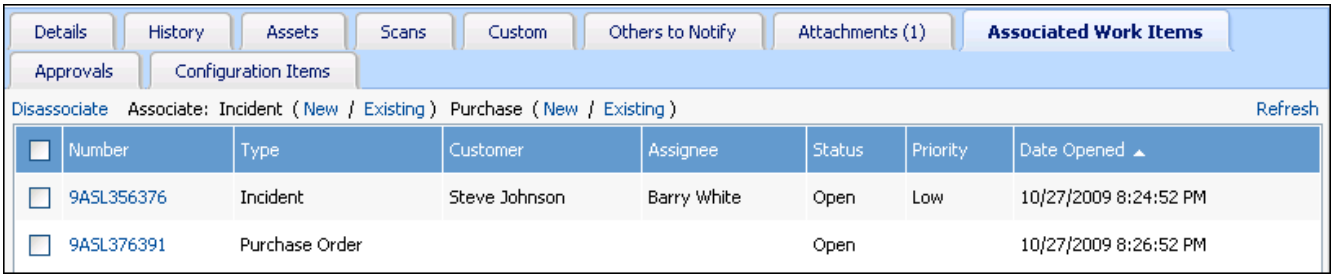
To attach a file to the change, click on the Add File button on the Attachments tab and select the file. The file name appears in the Attachment field.



Associating Work Items

Associating Incidents and Purchase Requests/Orders

You can associate multiple new and Incident and Purchase Request/Order records with a Change record. If configured, notifications regarding Change events can be sent to customers of associated items. A configuration option can also be set to close the associated incidents when a Closed status is selected for the change, and assign a Closed status to those records.



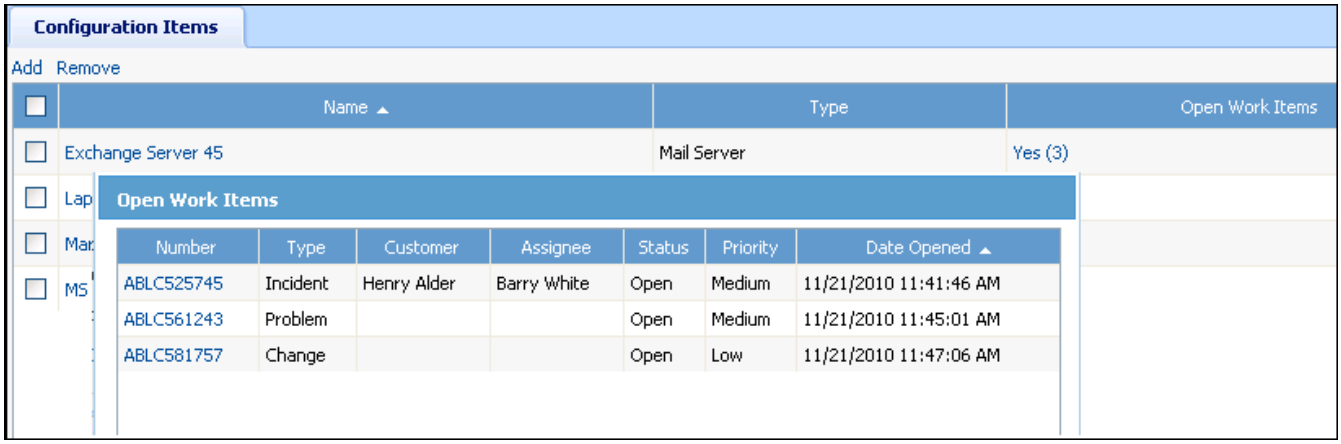
- Select New | Associated Incident or click the New Incident link on the Associated Work Items tab to create a new incident that will be associated with the Change record. The short description (if enabled) and long description specified for the change will be included in the

corresponding fields, and the categorization specified for the change will be included on the incident.

- Select New | Purchase Request or click the New Purchase Request link on the Associated Work Items tab to create a new purchase request that will be associated with the Change record. The short description (if enabled) and long description specified for the change will be included in the corresponding fields.
- Select Change | Associate Incident or click the Existing Incident link on the Associated Incidents tab to associate existing incidents with the Change record.
- Select Change | Associate Purchase Request or click the Existing Purchase link on the Associated Work Items tab to associate existing purchase requests with the Change record.

Associating Configuration Items

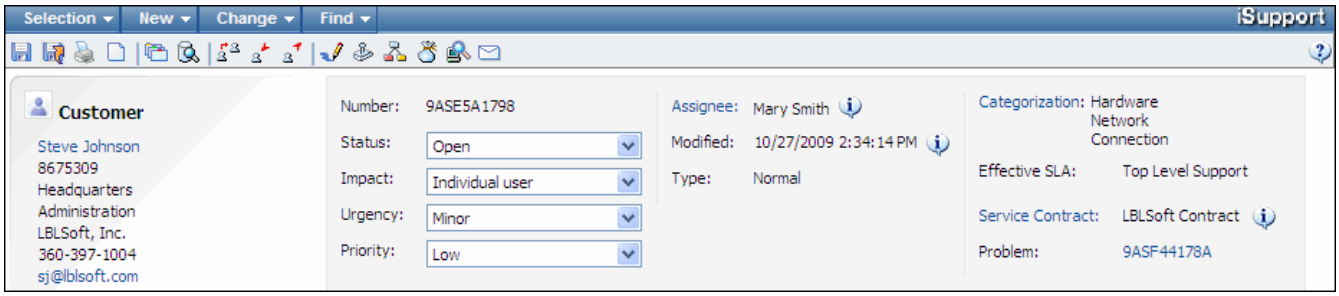
If you have the Service Desk Edition, click the Add link on the Configuration Items tab to associate a predefined configuration item with the Change record. Use this feature to track risk and impact on business-critical items; you can click on the item to display the Configuration Item screen for viewing the item's attributes and relationships with other items, and include information on associated configuration items in views, reports, and correspondence. See "Working with Configuration Items" on page 403 for more information. If the configuration item has other open incidents, problems, or changes associated with it, "Yes" will appear along with the number of open work items. Click the link to display a list of those items.



Associating a Problem

Select Change | Associate Problem to associate a Problem record with the change. A configuration option can be set to close the associated problem when a Closed status is selected for the change, and the Closed status assigned to the closed problem can also be configured.

The Problem field will appear below the Type field on the Details tab. Once a Problem record is associated, you can disassociate it by selecting Change | Disassociate Problem.



Only one Problem record can be associated with a change.

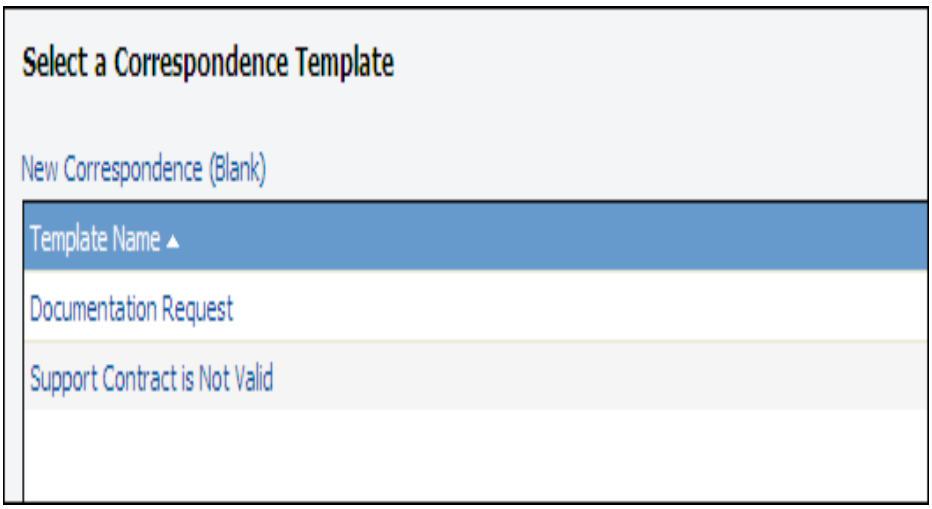
Performing Miscellaneous Change Tasks

Sending an Email From a Change Record

To send an email from the Change screen, you can:

- Select New | Correspondence.
- Click the New Correspondence icon.

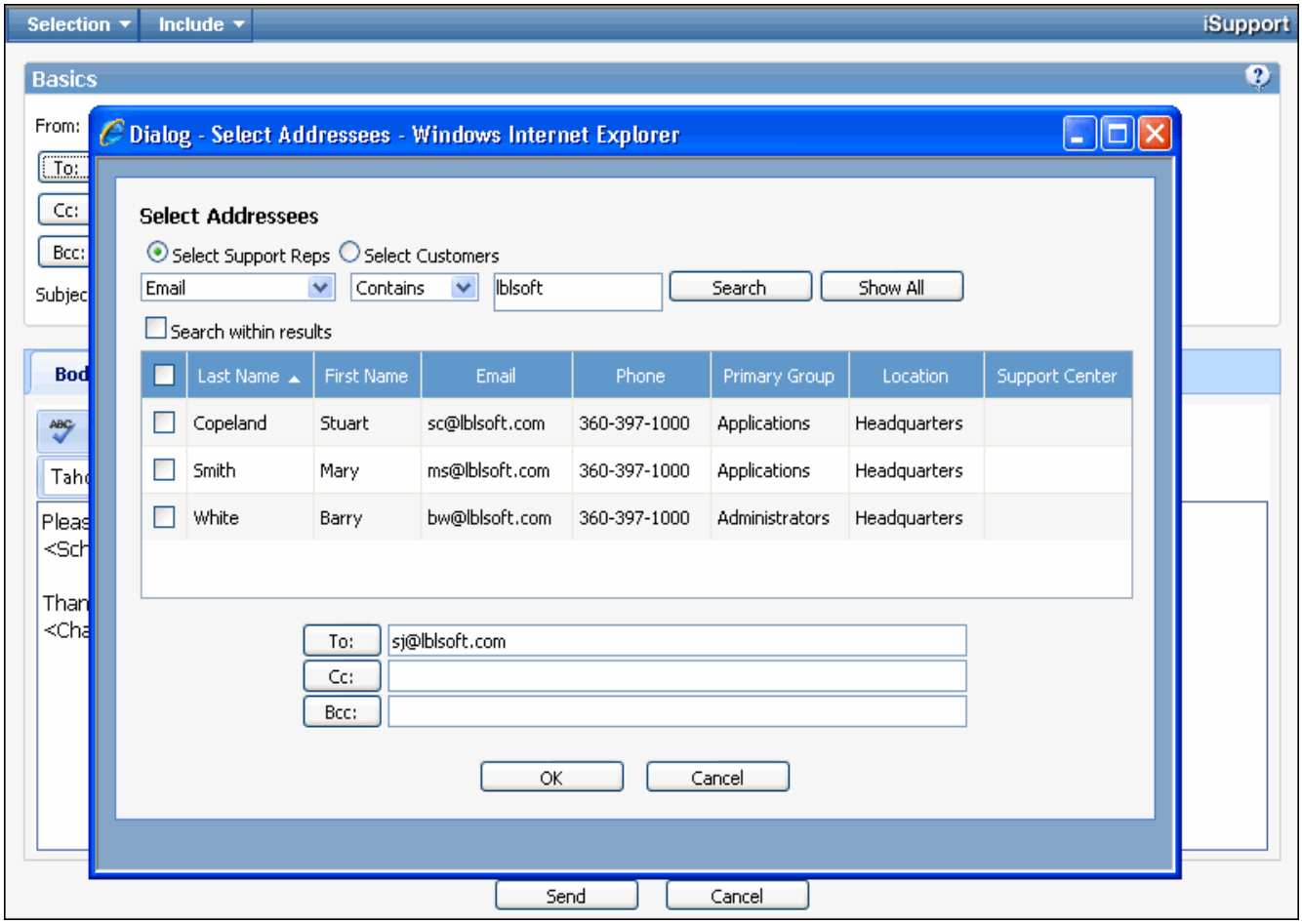
You can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).



Correspondence templates may be configured to contain only read-only (greyed out) fields.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included.

You can click the To, Cc, and Bcc buttons in the Correspondence screen to display a dialog for selecting addressees. Use care with the Select All ☐ checkbox, as it will include all names on the current page (up to 100 addressees).

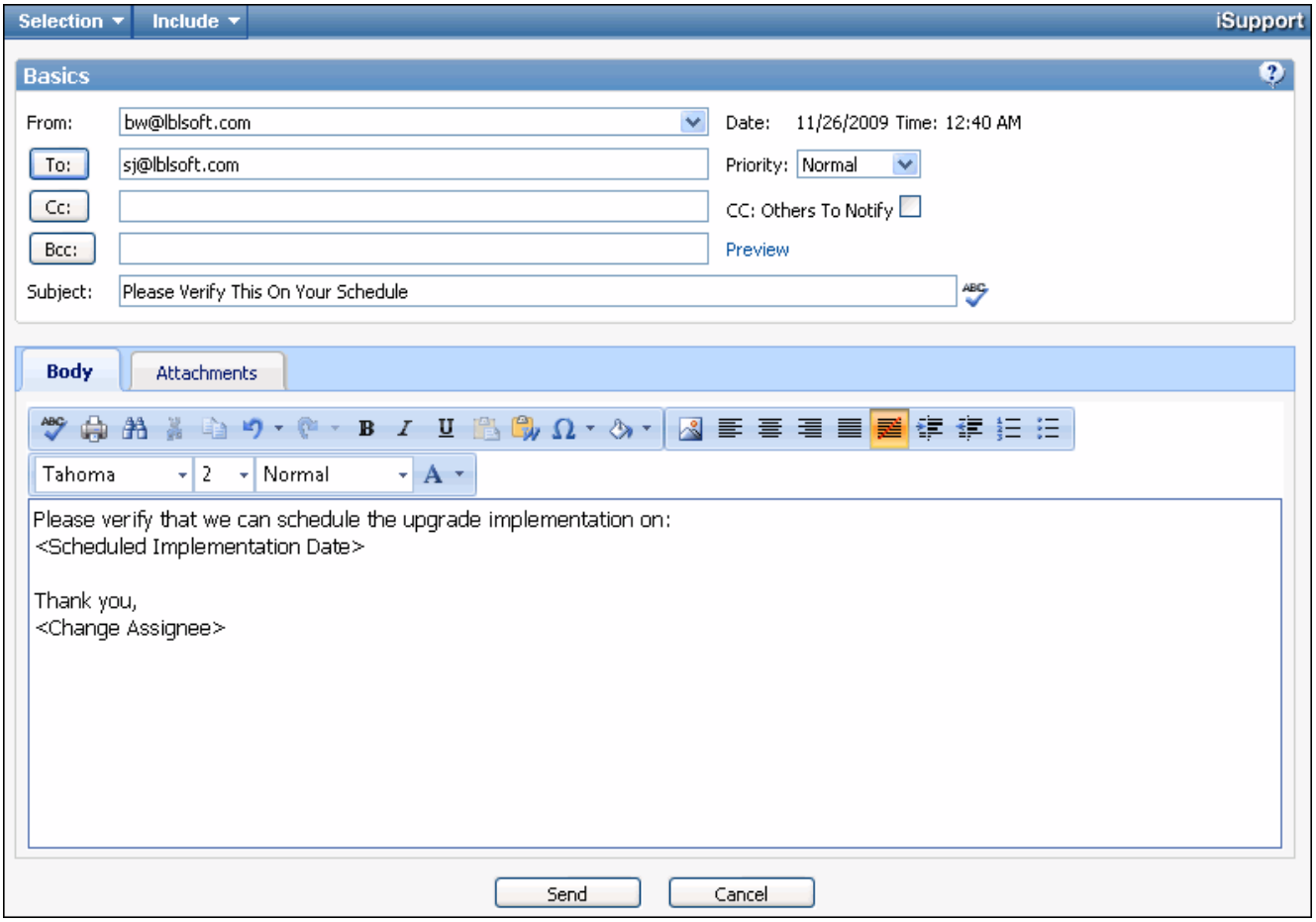


The cc:Others to Notify field in the Correspondence screen enables you to send the correspondence to those designated in the Others to Notify field in the current change and selected categorization.

If using a template, some or all of the fields may be populated. Fields (for example, <First Name>) may be included as set up during configuration. These fields will be replaced with corresponding data from the change when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

In either a blank correspondence or correspondence created from an editable template, the Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).

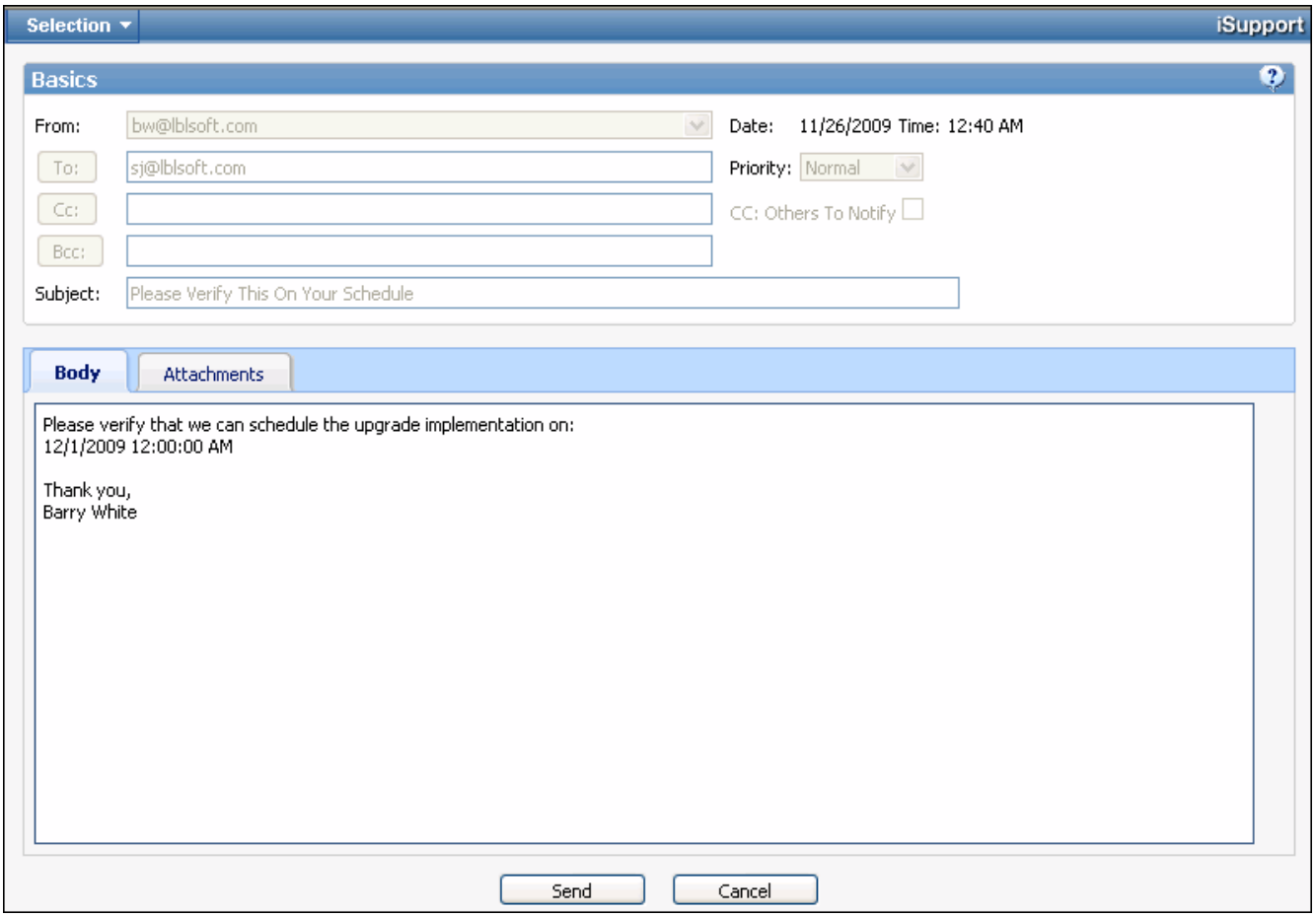


If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Body field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

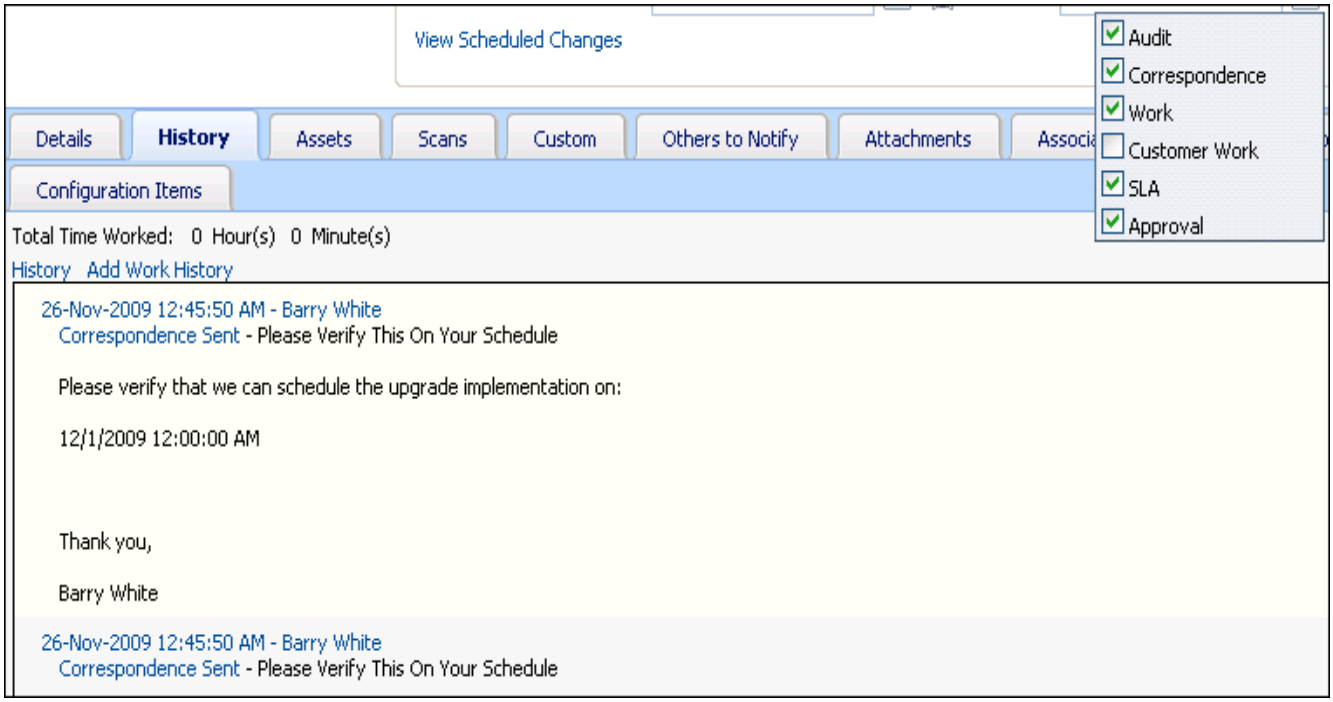
When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the change.



When finished completing fields in the Correspondence dialog, click the Send button.

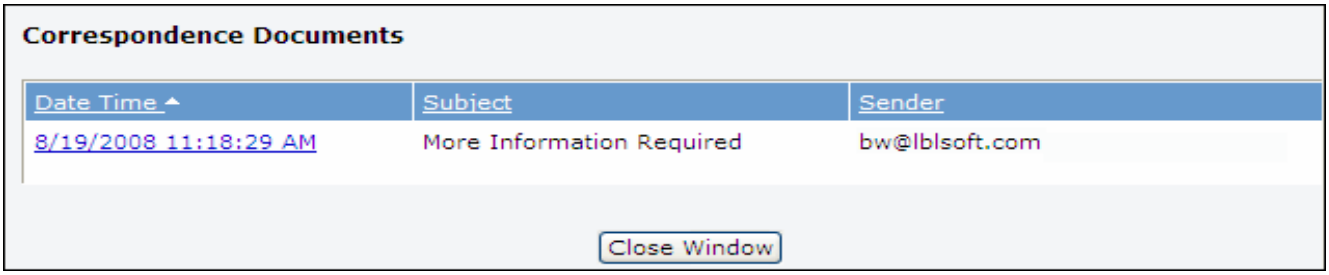
After the email is sent and the change is saved, notations are included on the History tab as shown below:



Searching From the Change Screen

From the Change screen, you can use the Find menu to:

- Select Find | Knowledge for Categorization or click the Find Knowledge for Categorization icon to search for knowledge entries that have same categorization as the current change.
- Select Find | Call Script to search for the call script associated with the selected categorization.
- Select Find | Incidents for Categorization to search for incidents that have the same categorization as the current change.
- Select Find | Problems for Categorization to search for problems that have same categorization as the current change.
- Select Find | Changes for Categorization to search for changes that have same categorization as the current change.
- Select Find | Correspondence for Change to display all correspondence sent from the current change.



From the Correspondence Documents dialog, you can open a document by clicking on it. System-generated correspondence is not included in this dialog.

You can also view correspondence using views on the Desktop.

Working With Approval Cycles

Approval cycles require changes to be approved by designated approvers before most change functions can be performed. Approval cycles are set up in the Configuration module, configured with serial or concurrent approvers, notifications, and statuses for each stage of the process. Approvers can be support representatives or customers (who specify a verdict via the End User Desktop). An approval cycle can be associated with a customer profile, company record, or category.

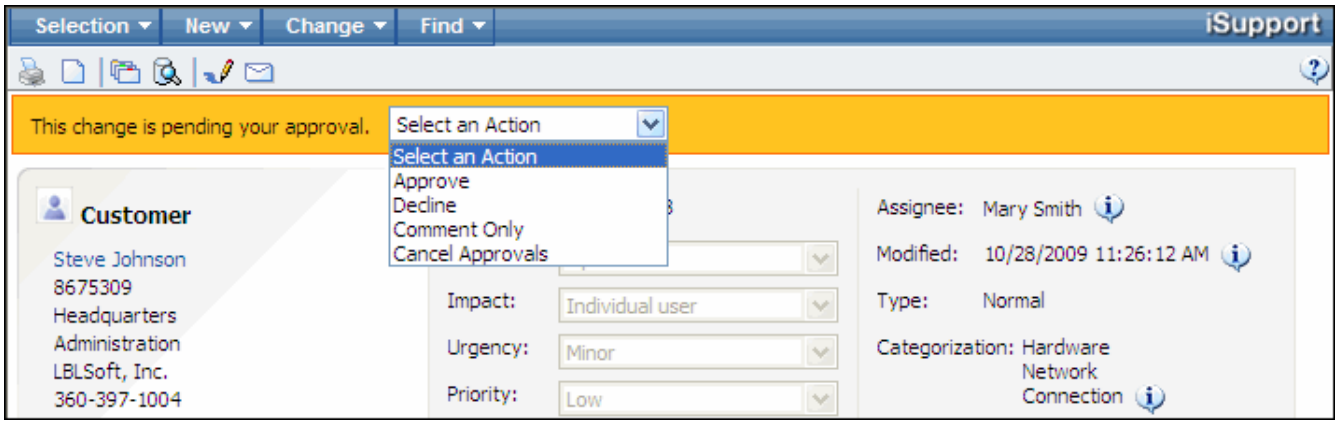
A service level agreement can require one or more approval cycles to go into effect:

- The initial approval cycle
- Any cycles associated with a customer profile, company record, or category
- The final approval cycle

Approval functionality is not affected by the business hours configured for an SLA. When a change is saved with a service level agreement that requires approvals, the approval cycle will go into effect automatically. If any approval cycle results in a Decline verdict, no further cycles will apply. If an SLA-required cycle is completed or cancelled, the Change menu will contain an Initiate Approvals option to restart the approval process.

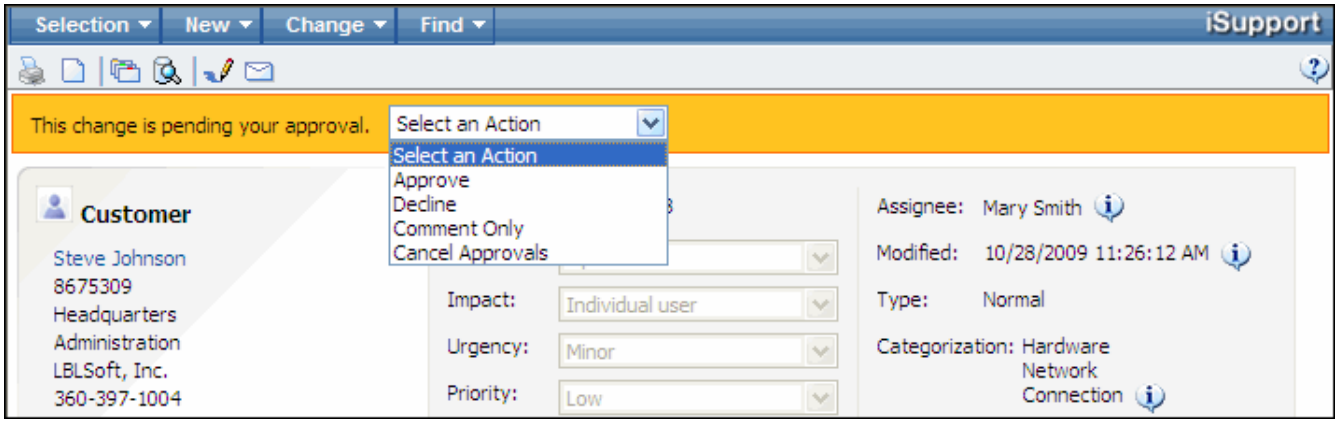
Approval cycles can also be designated as available for you to initiate in the Change screen on an ad hoc basis if the change is not currently pending approval.

If an approval cycle is in effect, an alert bar will appear at the top of the Change screen after the change is saved and most of the Change fields will be disabled. (However, you can send correspondence and update work history.)



Specifying a Verdict

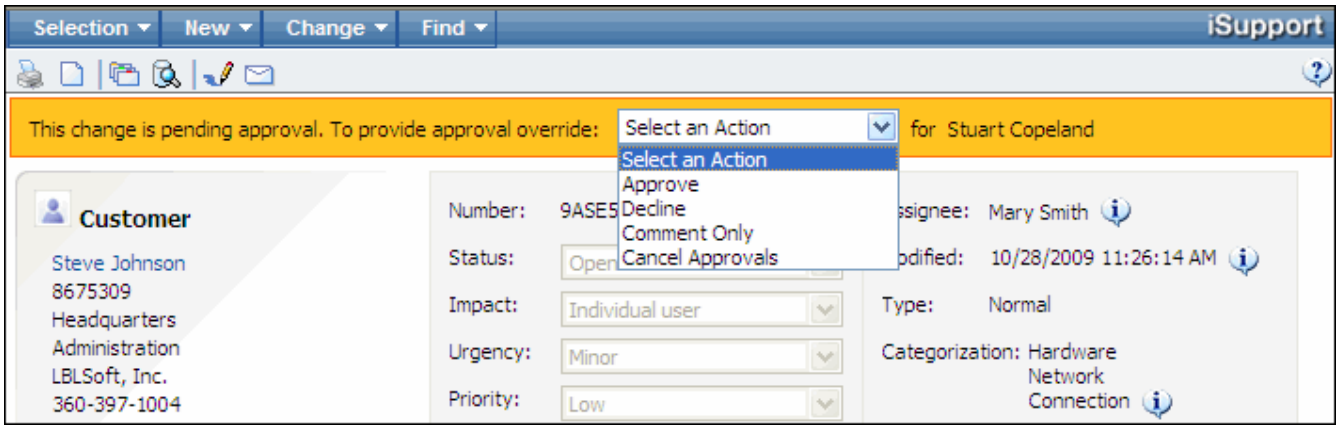
An action dropdown field will appear in the approval alert bar if you are the current approver in the approval cycle or if you have permission to override approvals.



Select one of the following:

- **Approve** to enable the next approver to specify a verdict or, if it is the final approval, complete the cycle.
- **Decline** if you do not wish to enable functionality on the change. An entry will be required in the Comments field. One or more Decline verdicts may be needed to stop the cycle.
- **Comments Only** to enter any comments without approving, declining, or cancelling the cycle. The comments will be included in notifications sent to recipients configured for the approval cycle.
- If you have permissions, you can specify **Cancel Approvals** to cancel the cycle. An entry will be required in the Comments field; the comment will be appended to the text in the Resolution field if the status is configured to be a Closed status. An approval cycle can also be cancelled by the customer assigned to the change.

If you are not the current approver but you have approval override, the following will appear:

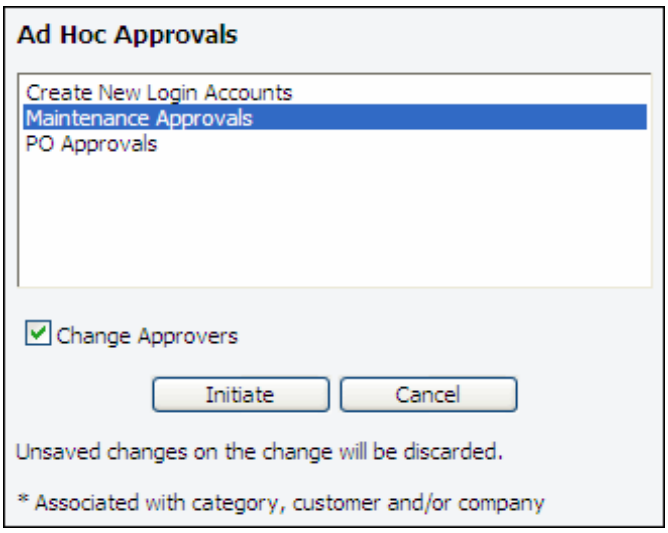


When you specify a verdict, configured notifications will be sent and the change status changes to the status designated by the approval cycle if it is a cancellation, final approval, or final decline.

If an SLA-required cycle is completed or cancelled, the Change menu will contain an Initiate Approvals option to restart the approval process.

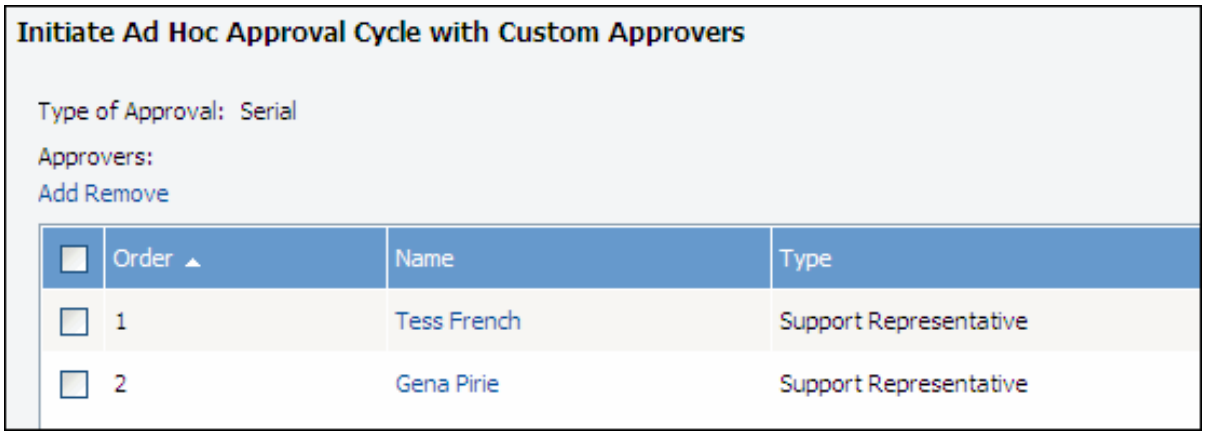
Initiating an Approval Cycle

To initiate an approval cycle in the Change screen, select Change | Initiate Ad Hoc Approval after a change has been saved. The following dialog appears with the approval cycles designated as available for ad hoc use. The cycle will be enabled for the change after the Initiate button is clicked.



An active ad hoc approval cycle for a change will not be cancelled when the effective SLA changes; any approvals that are defined by the new effective SLA will initiate after the ad hoc cycle is approved.

The Change Approvers checkbox will display if permissions are configured; select it to display the following dialog for adding or removing the approvers configured for the selected cycle.

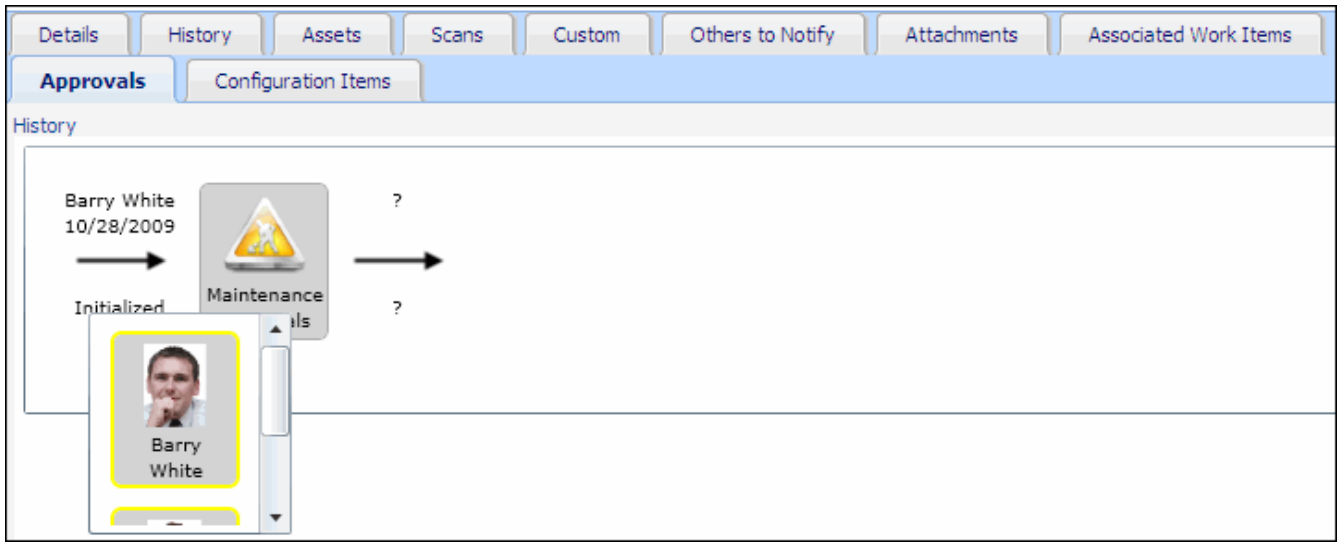


Viewing Approval History

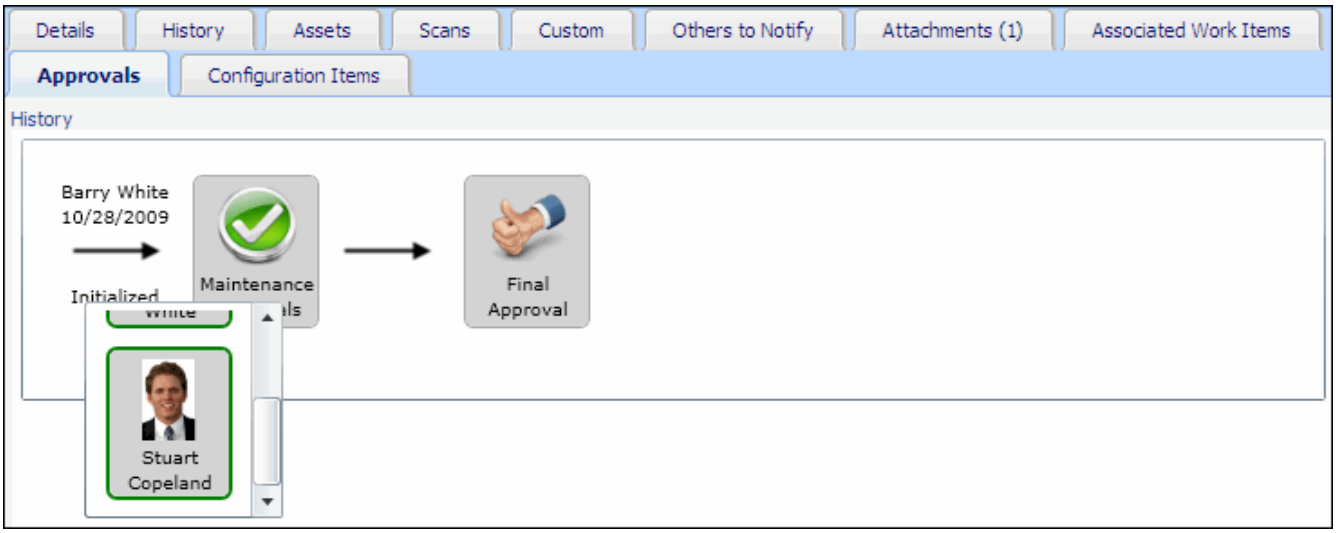
If using Internet Explorer, an Approvals tab will appear with a graphic display of the approvers and status of each approval in the approval process; if using other browsers a View Approvals link will appear in the upper portion of the screen. Pictures are associated with support representatives in

the Support Representative Profile screen and with customers in the Customer Profile screen; if a support representative is involved in an approval cycle, the associated picture will appear when you click an icon on the Approvals tab. When an approval process is initiated, the picture and icon will appear as shown in the example below. The picture will be outlined in yellow if the approver is next in the approval process.

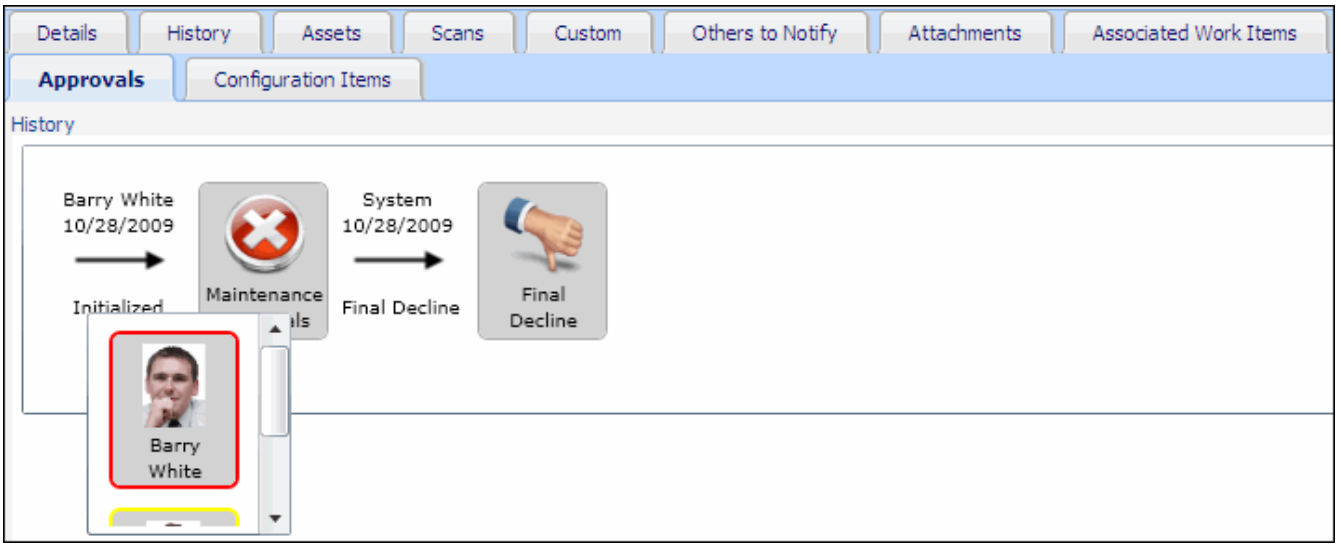
Note: if using a browser other than Microsoft Internet Explorer, a link appears instead of an Approvals tab for viewing approvals.



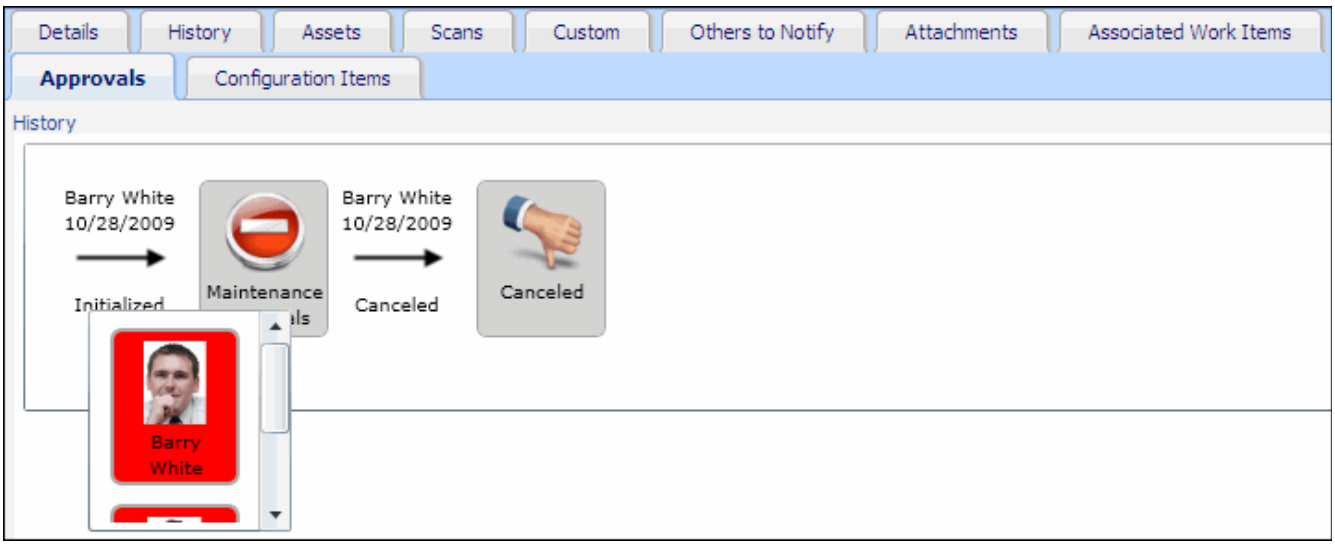
The picture will be outlined in green if the approver specifies an Approve verdict.



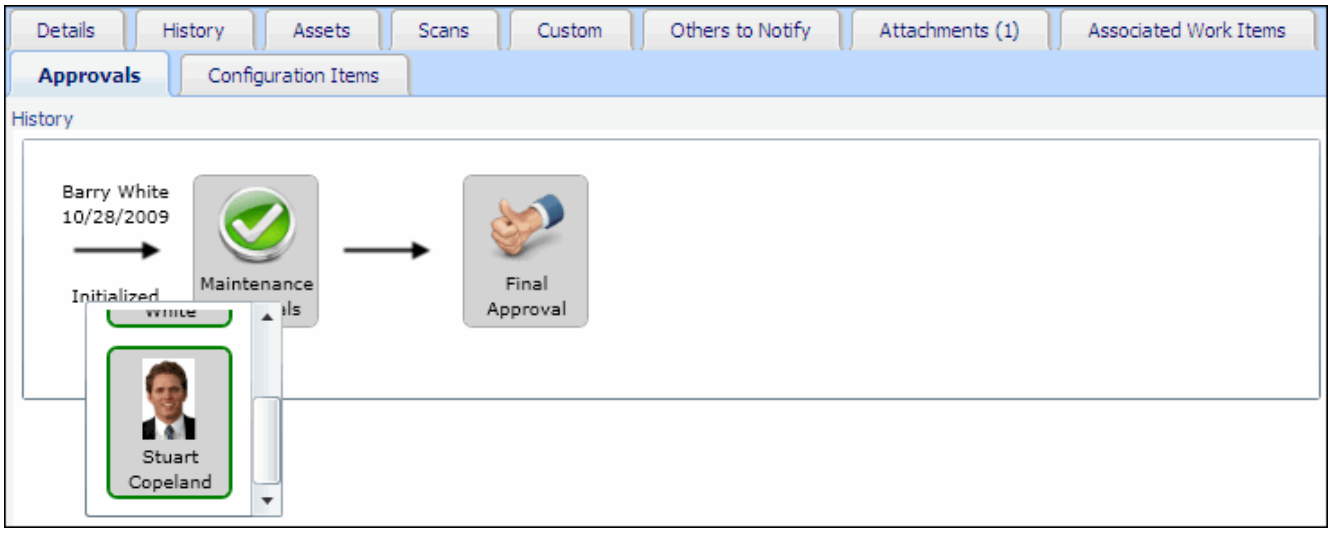
If an approver specifies a Decline verdict, the icons and pictures will appear as shown in the example below.



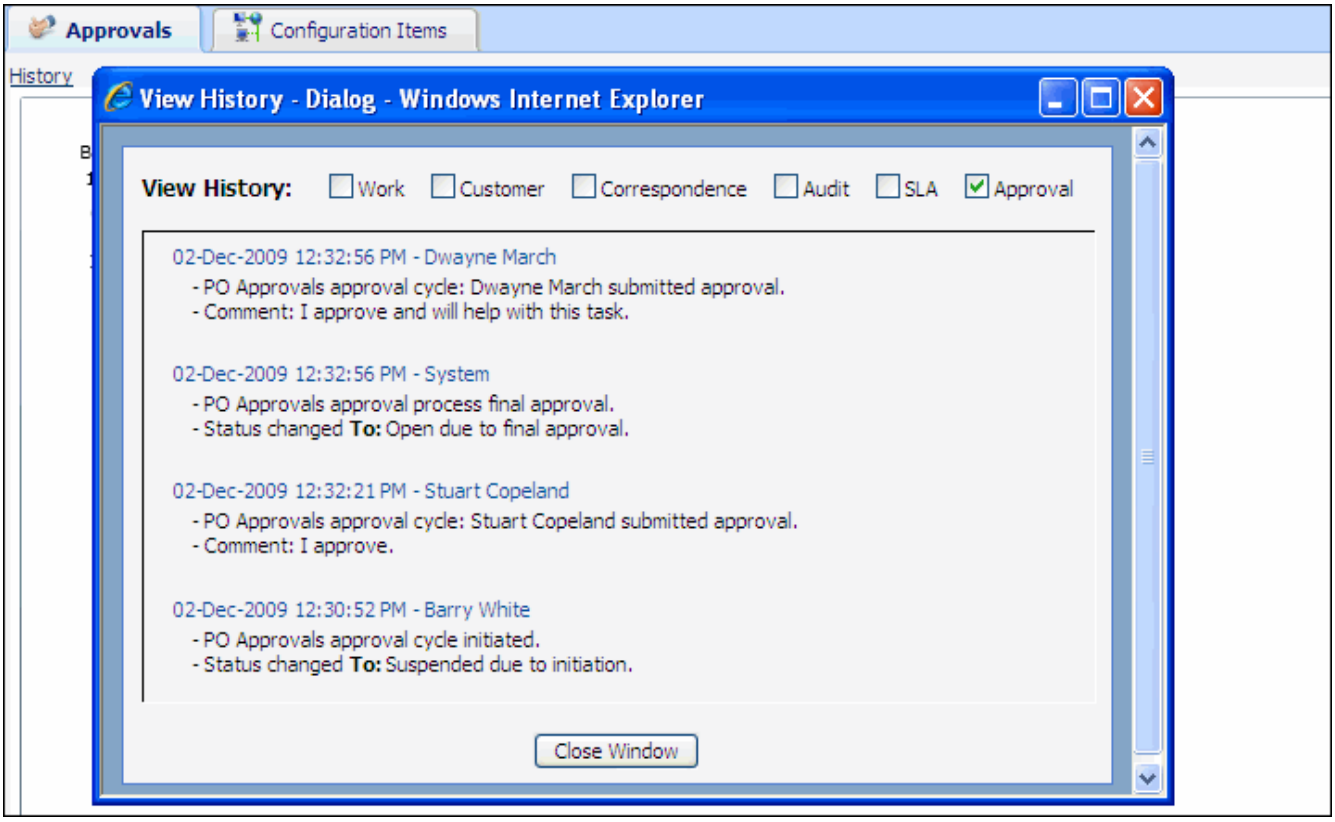
If an approver cancels the approval process, the icons and pictures will appear as shown in the example below.



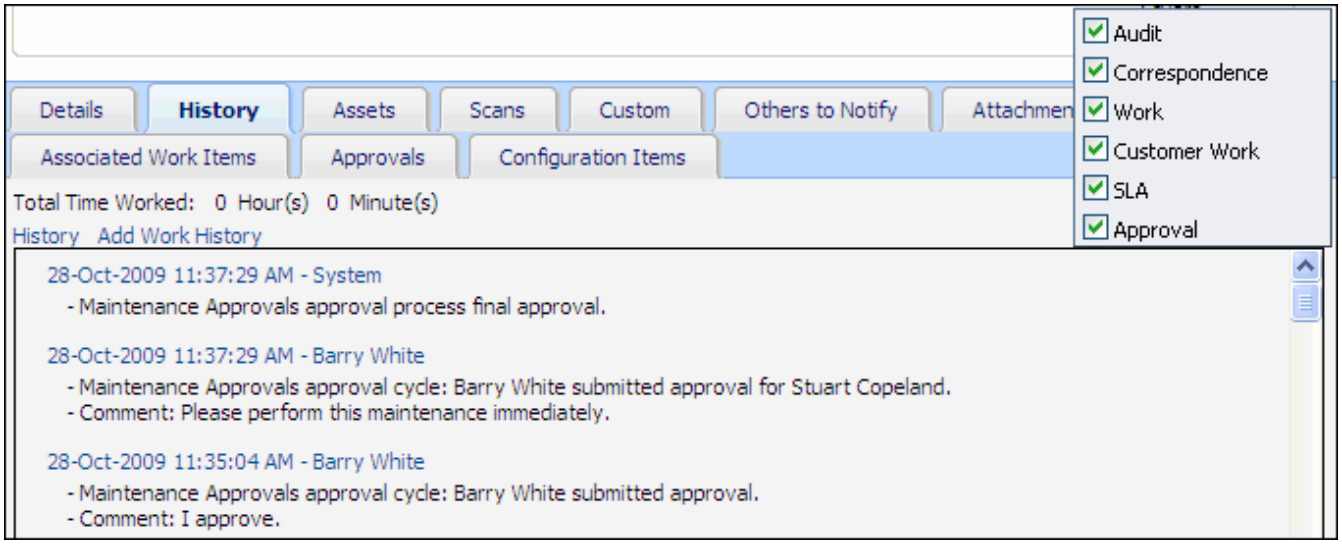
If the process results in an approval, the icons and pictures will appear as shown in the example below.



Click the History link on the Approvals tab to display all comments and approval actions.



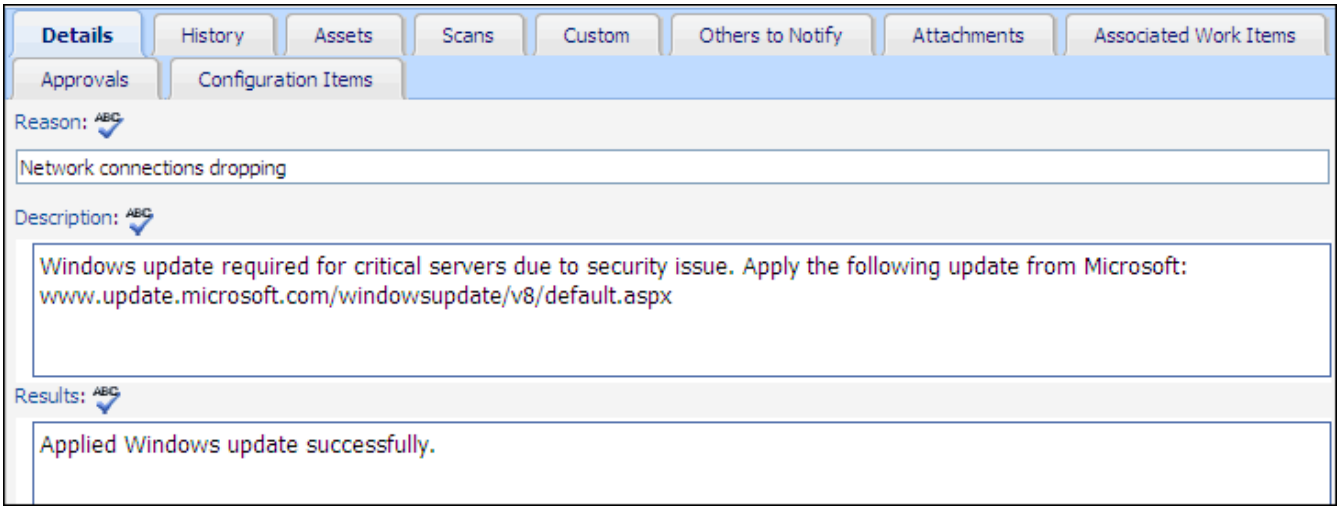
You can also use the Approvals checkbox on the History tab to view approval actions.



Resolving Changes

Entering the Result

In the Results field, enter the outcome after the change. You can click the icon to spell-check your entry.



If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Description and Results fields; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Searching for Knowledge Entries

To display knowledge entries matching the selected category set, click the icon or select Find | Knowledge for Categorization in the Change screen. If you find a knowledge entry applicable to the change, you can select Knowledge | Capture Solution to copy and paste the description and

resolution into the corresponding fields on the change. The resolution from the knowledge entry will be appended to the bottom of the text in the Results field on the change.

View Related Knowledge Entries

Description	Resolution	Category	Status	Average Rating
How do I replace a network cable on a laptop?	Purchase Etherlink III Lan PC card and cable from Computer Warehouse Inc. and attach to laptop. Confirm that the cable has both 10 mb and 100 mb lights.	Connection	Approved External	0.00

Selection | New | Knowledge | iSupport

Entry Number: 9B2D126A47
Author: Barry White
Source: Direct Entry
Created: 11/2/2009 12:01:59 PM
Categorization: Hardware Network Connection
Status: Approved External

Issue | Information | Audit History | Feedback and Rating | Attachments

Description:

How do I replace a network cable on a laptop?

Resolution:

Purchase Etherlink III Lan PC card and cable from Computer Warehouse Inc. and attach to laptop. Confirm that the cable has both 10 mb and 100 mb lights.

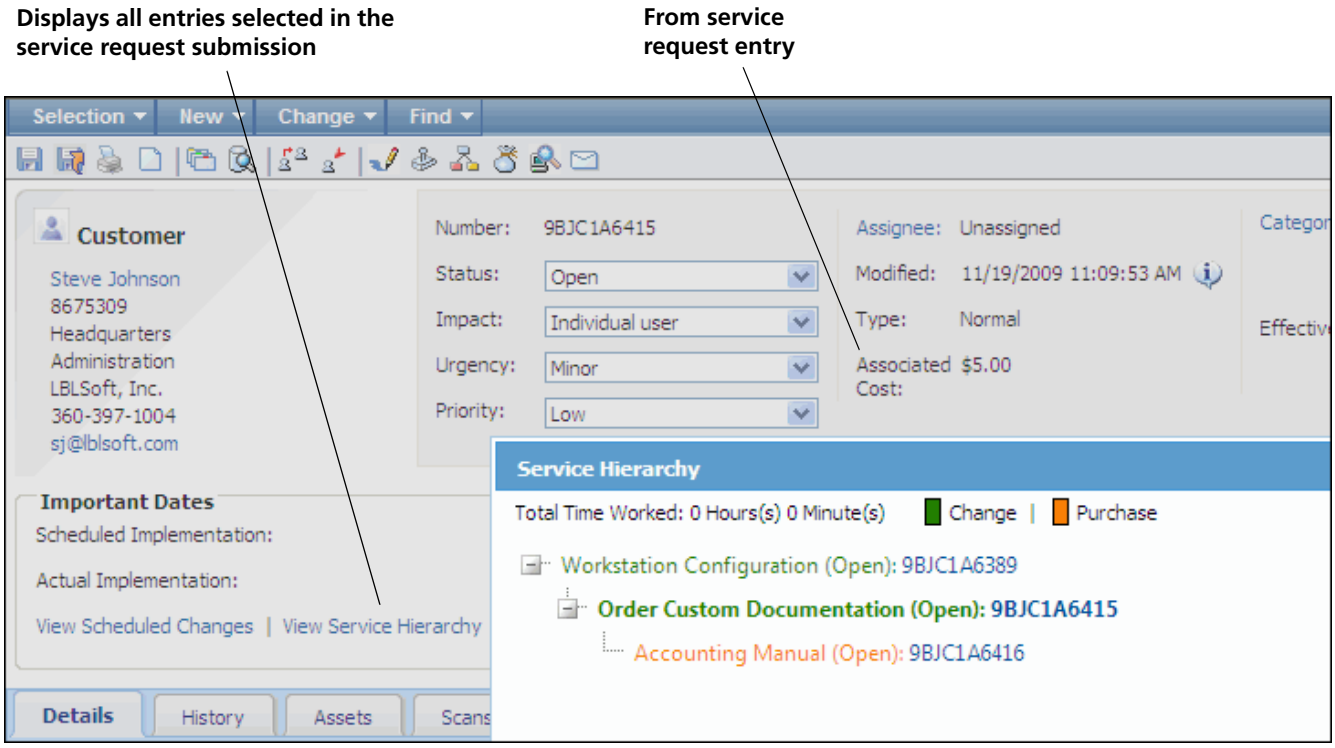
Viewing Change Records Created via Service Requests

Service Catalog functionality enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the End User Desktop. Note that access to an entire service catalog or individual service catalog entries may be restricted to specific customer and support representative groups. See "Creating Service Requests" on page 413 for information on creating service requests.

Service catalogs are entered in the Configuration module; each contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

After a service catalog request is submitted by a customer, a Purchase Order or Change record will be created from the corresponding template and any configuration item specified for the service catalog entry will be associated with it. Custom fields may be completed by the customer or support representative.

Any associated cost configured for an entry will be included on the Change or Purchase Order record created from the entry. A View Service Hierarchy link will also appear for displaying all of the selected entries in the service request submission; click on a number to open a record.

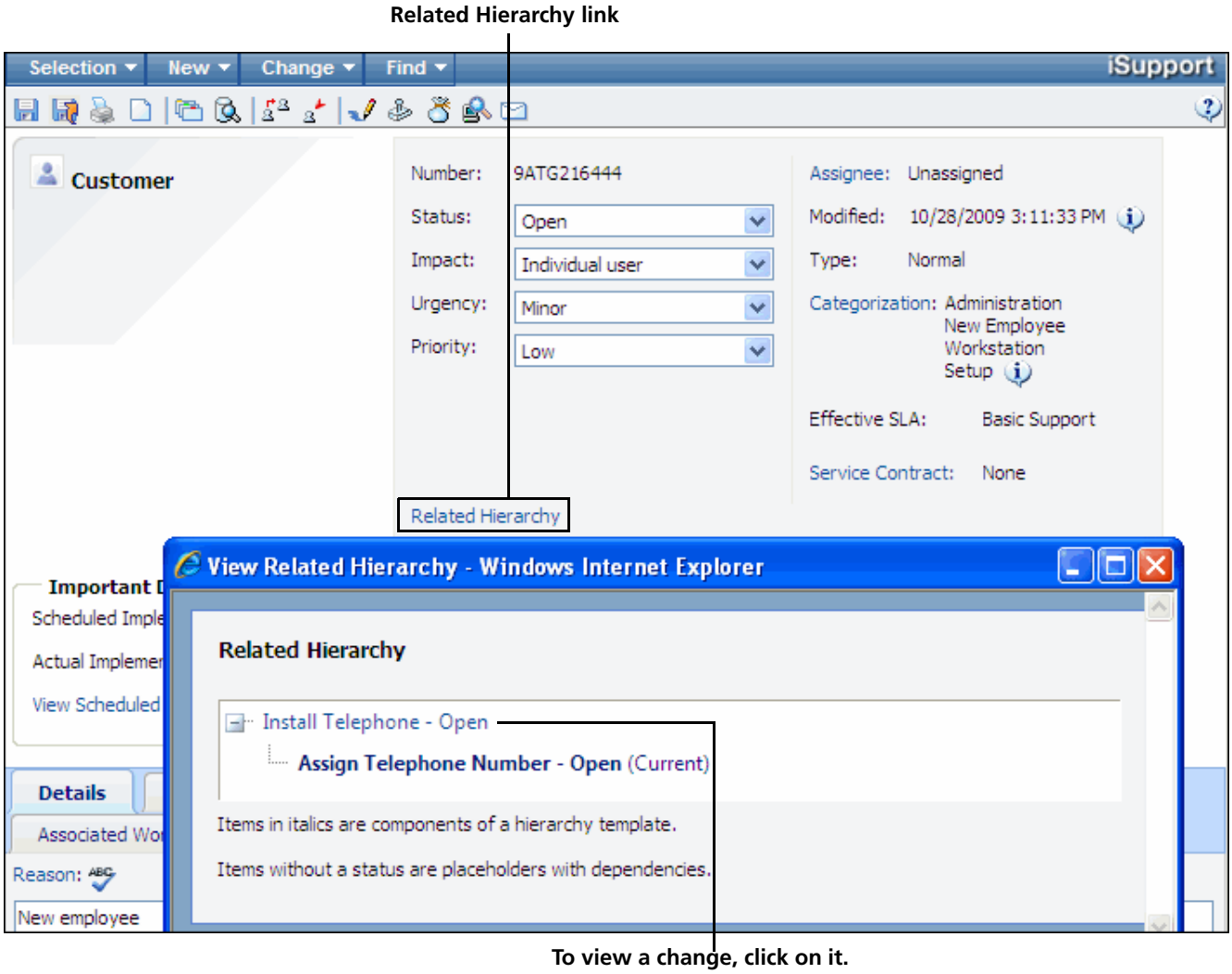


Creating Change Hierarchy Structures

Creating Related Changes

You can create related changes to associate and track related tasks and requests. For example, for change regarding maintenance on a printer, you could create a related change for ordering more toner for the printer. You can close all related changes when you close the original change.

To create a related change, select New | Related Change from a saved Change record. Complete the fields and save the change. Then save the original change. A Related Hierarchy link appears; related changes are indented in the Related Hierarchy dialog.

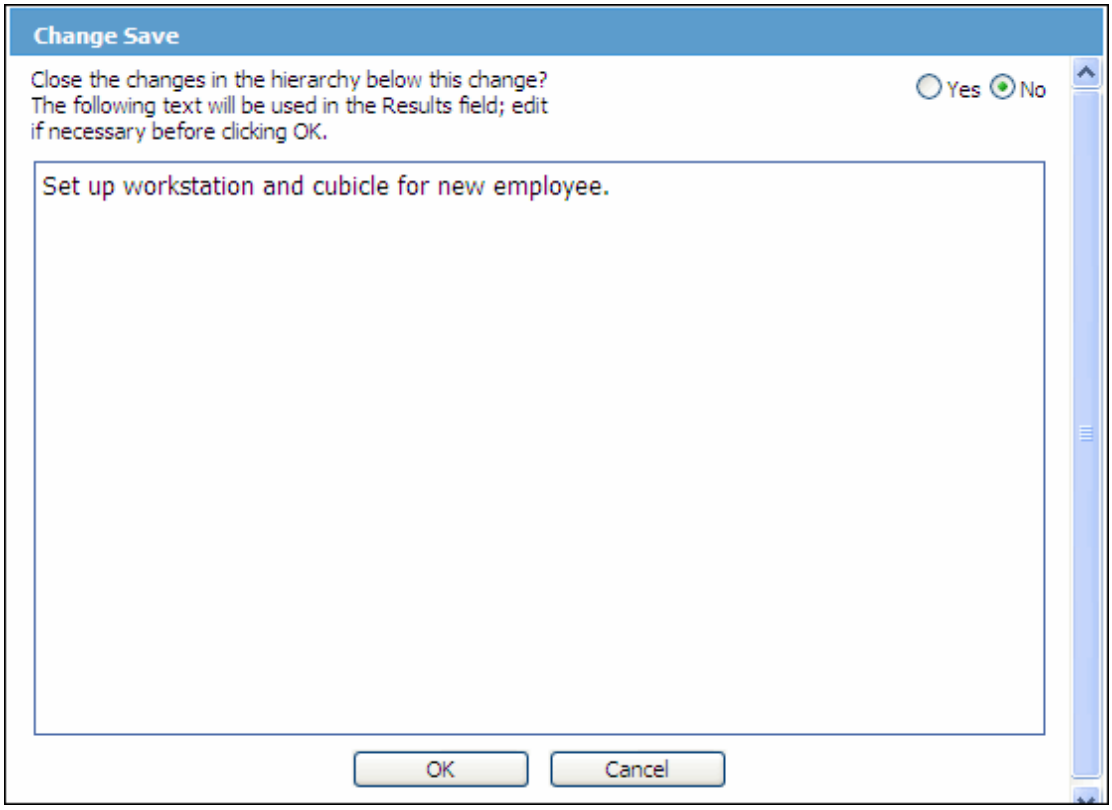


If you open a related change and then create and save another related change, a hierarchy would be created as shown below. In iSupport, a structure created in this manner is called a *dynamic hierarchy* because you can add and remove changes as needed.

Related changes can be inserted into the hierarchy. For example, in the hierarchy shown above, you can open the Assign Telephone Number change and select New | Related Change to add another change under the open change.

Closing Related Changes

When you enter a change result and close a change with one or more lower level related changes, a prompt will appear for closing the related changes.

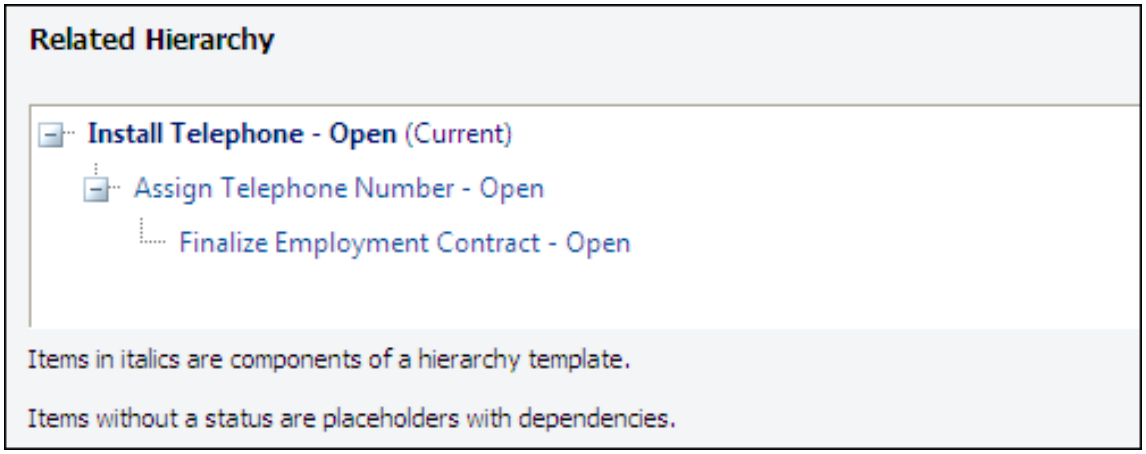


If you select Yes, the results will be appended to any existing results in the lower level changes and the lower level changes will be closed. If you select No, the lower level changes will remain open.

For information on closing related changes in a more complex change structure, see "Using Hierarchy Templates in the Change Screen" on page 347.

Removing Changes in a Dynamic Hierarchy

Select Change | Remove From Hierarchy if you need to remove a change from a dynamic hierarchy structure.



There are three removal options:

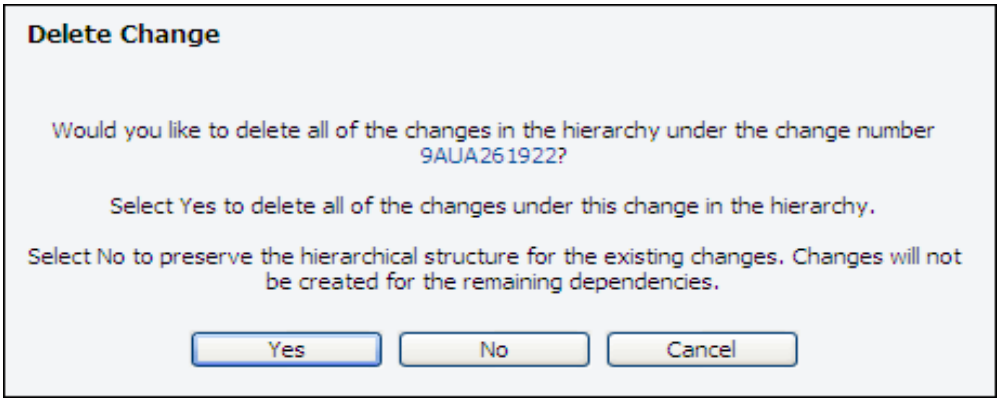
- You can remove **the current change but not its related changes** from the hierarchy. The current change will become an independent change. In the example above, if you remove the Install Telephone change, its lower level changes will retain their structure.
- You can remove **the current change and its related changes** from the hierarchy. In the example above, you could open the Assign Telephone Number change and remove it as well along with its lower level change (Finalize Employment Contract).
- You can remove **the related changes under the current change but not the current change**. The first level being removed will become the top level for its related changes in a separate dynamic hierarchy. In the example above, the current change is Install Telephone. You could

remove the Assign Telephone Number change and its lower level change (Finalize Employment Contract), and those changes would retain their relationship. The Install Telephone change would become a standalone change.

Deleting Changes in a Dynamic Hierarchy

When you delete a change in a dynamic hierarchy, a prompt will appear with the option of deleting its lower level changes.

In the example above, if you delete the top level Install Telephone change, the following appears:

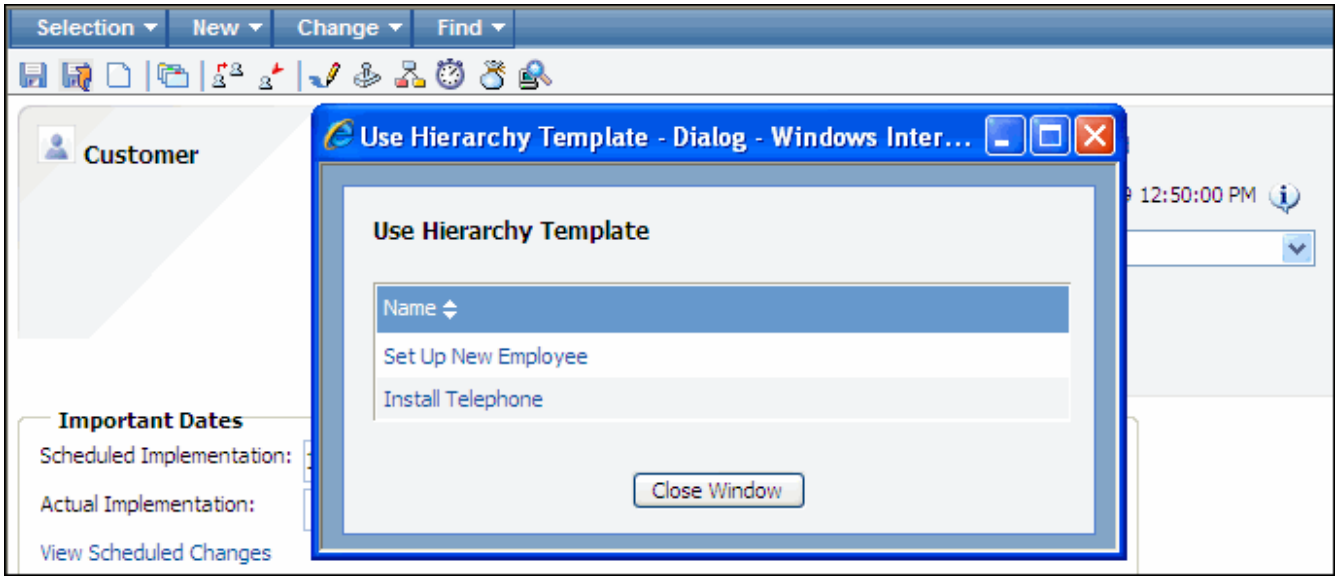


If you select No, the lower level changes will not be deleted and will retain their structure.

Using Hierarchy Templates in the Change Screen

Use hierarchy templates to track and manage tasks that have multiple activities. Existing change functionality such as escalation and routing apply to changes created from hierarchy templates.

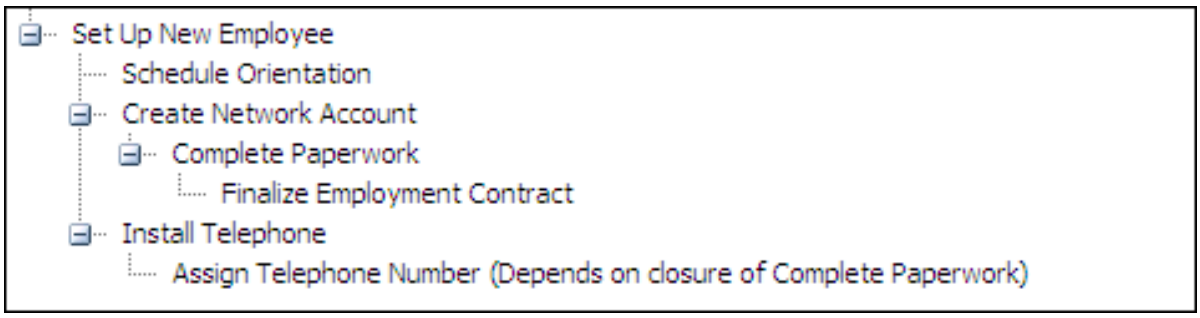
To use a hierarchy template in the Change screen, select Change | Use Hierarchy Template or click the Use Hierarchy Template icon.



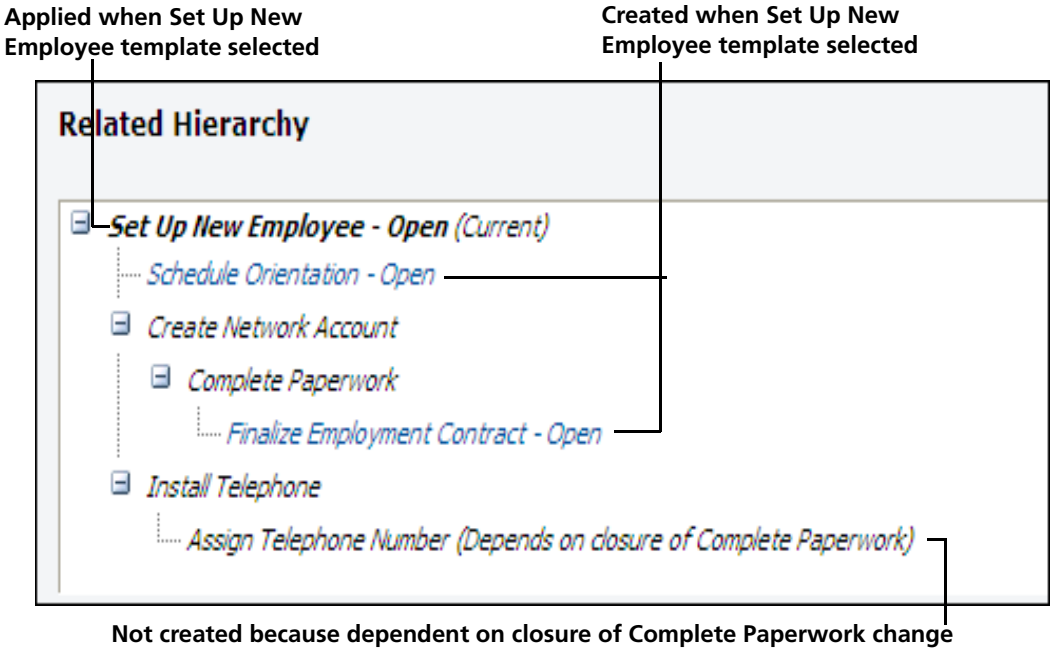
Only top-level templates appear for selection in the Change screen and on the End User Desktop (if configured to be available to support representatives and customers).

When a hierarchy template is selected for a change, the template structure is copied to the Change record. The top-level template is applied to the change and Change records are created for any templates without lower-level templates or other dependencies. If a template contains a dependency, a change is *not* created from it until the dependent changes are closed.

Template Hierarchy



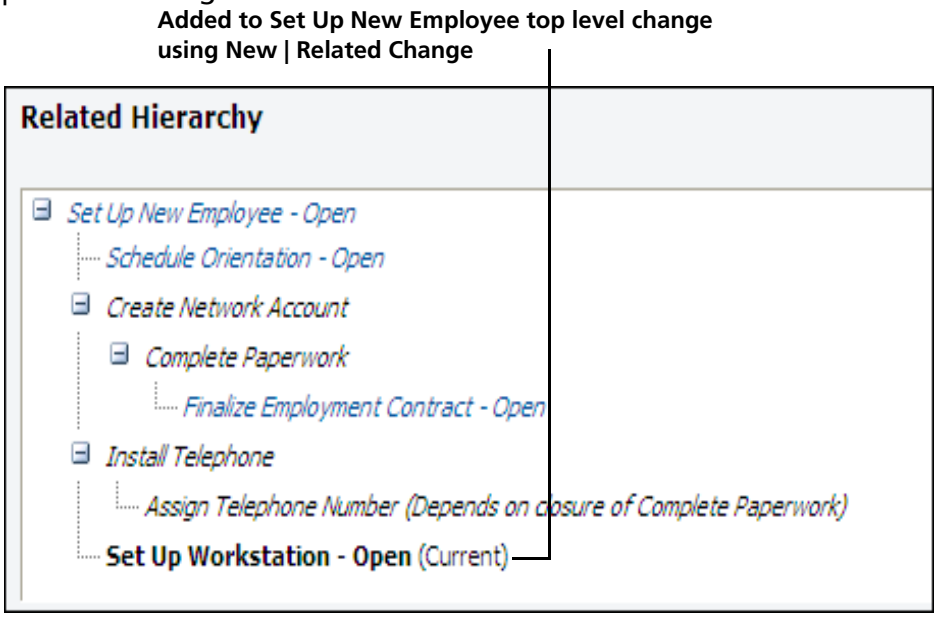
When Template is Selected in Change Screen

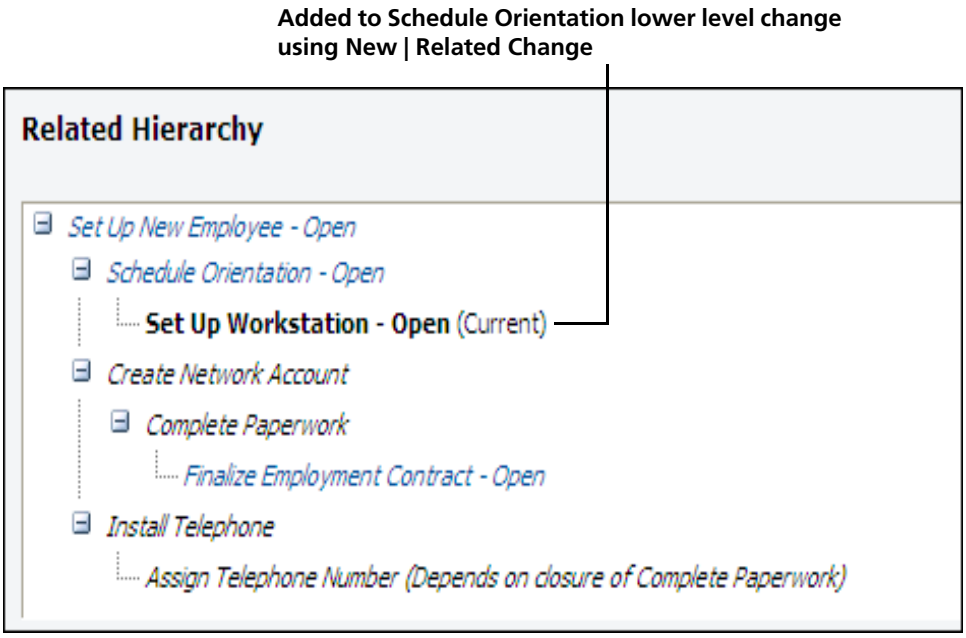


Adding Changes to a Template Hierarchy

To add a change or a change and its hierarchy to a change in a hierarchy template structure, you can do the following:

- Select New | Related Change:

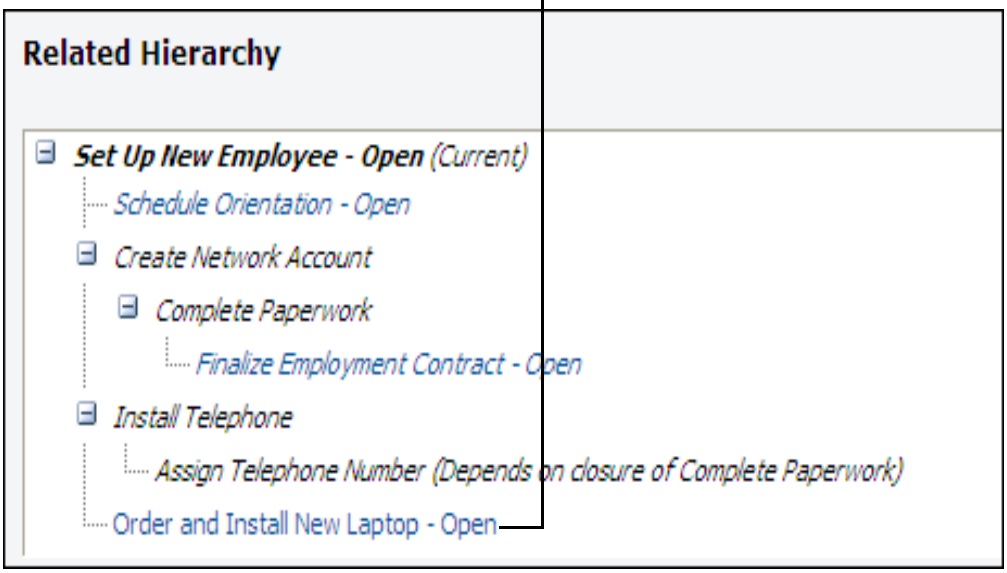




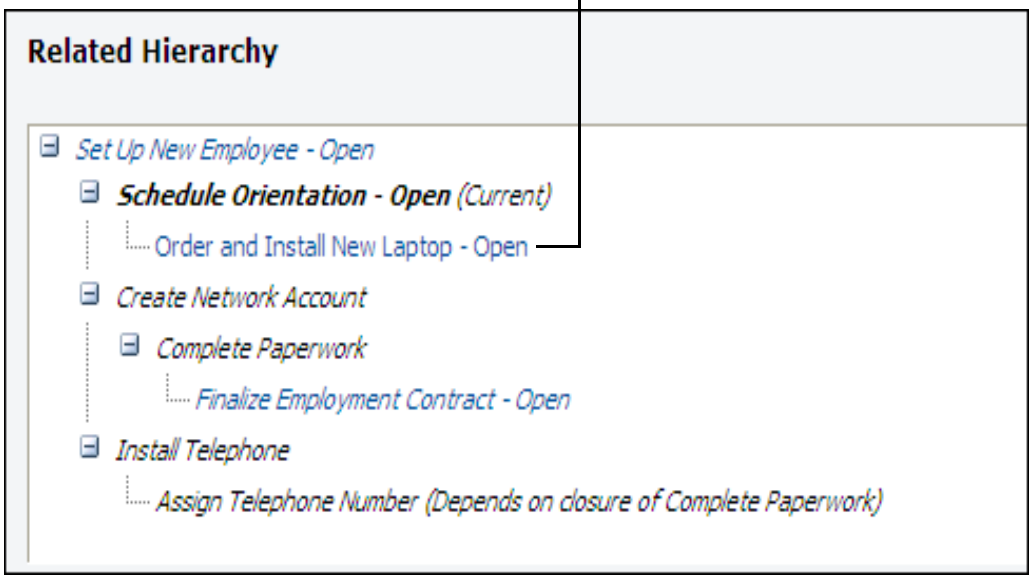
Note that the added changes are not italicized because they are not components of a hierarchy template.

- Select Change | Add to Hierarchy to add an existing change.

Added to Set Up New Employee top level change using Change | Add to Hierarchy



Added to Schedule Orientation lower level change using Change | Add to Hierarchy

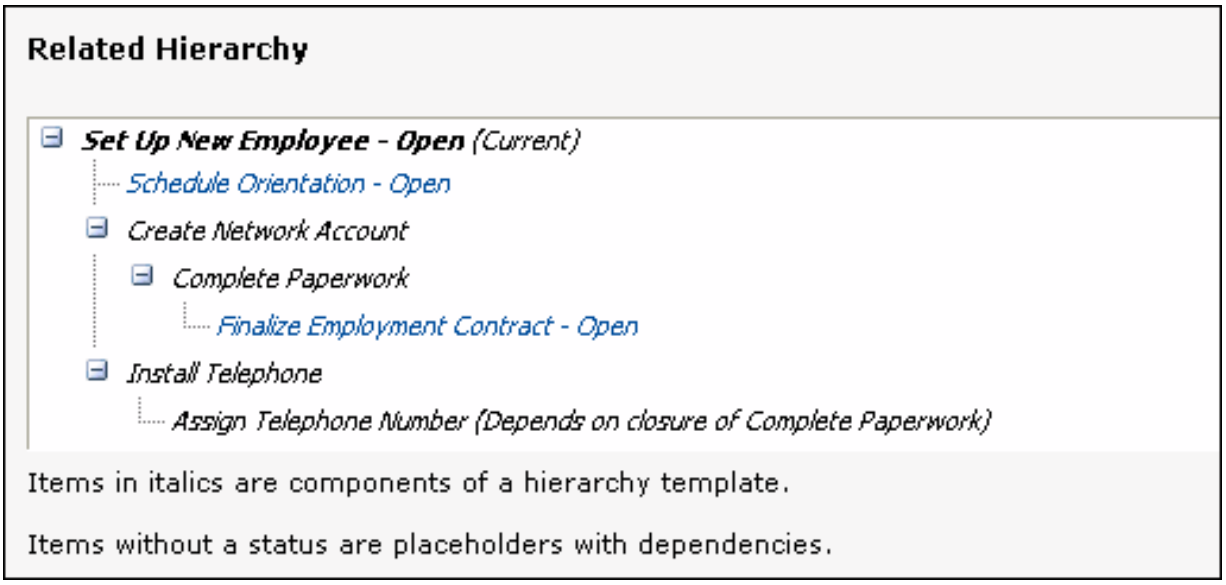


If the added existing change contains lower level changes, the structure is also added.

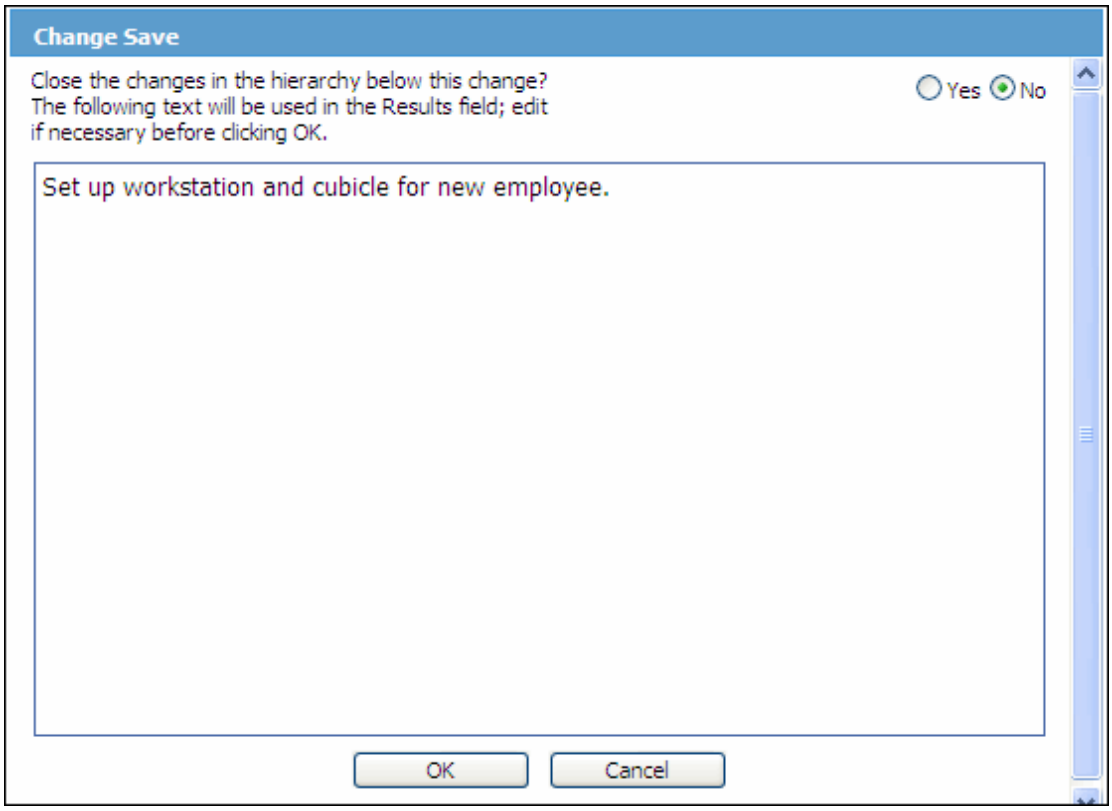
Closing Changes in a Hierarchy Template Structure

Closing a Top Level Change in a Hierarchy Template

If you close the top level change in a hierarchy template structure, changes in all levels underneath it must also close and changes will not be created from template placeholders. In the example below:

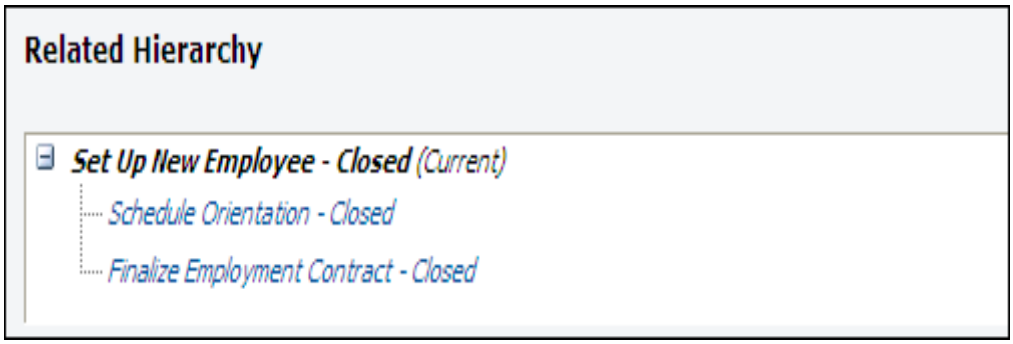


In the Set Up New Employee change, the following dialog appears when you enter results, select a closed status, and save the change:



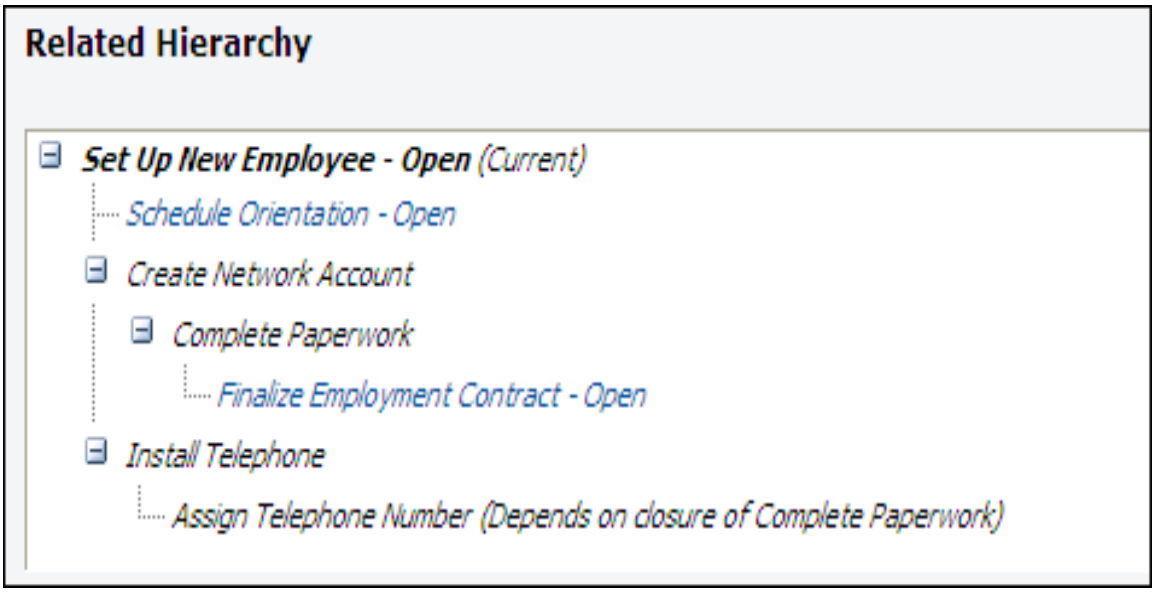
Use this dialog to change the results that will be applied to the open lower level changes before closure. If you select Cancel in this dialog, the top level change will remain open.

After you select OK, the hierarchy is as follows:

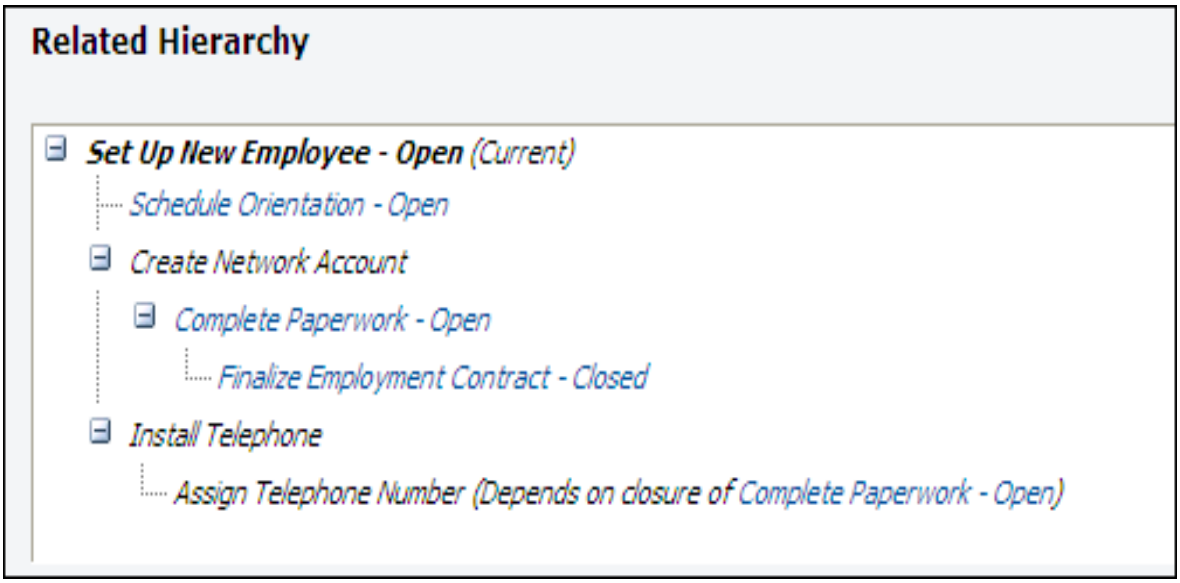


Closing Lower Level Changes in a Hierarchy

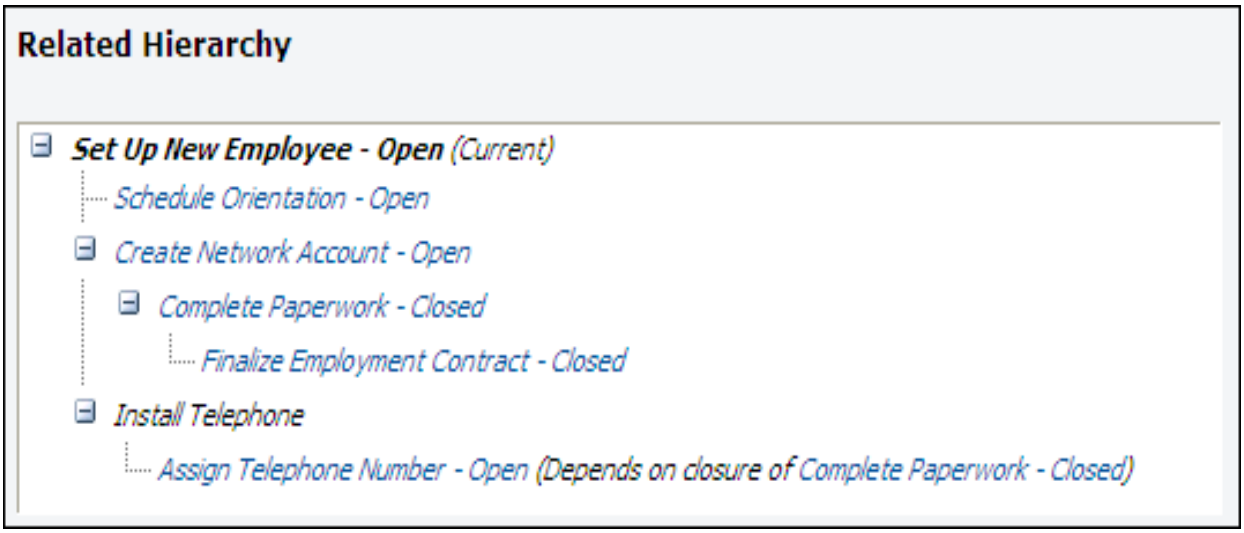
When a lower level change in a hierarchy template is closed, changes are created from templates that were dependent on closure of that change. In the following example, after the Finalize Employment Contract change is closed, the Complete Paperwork change is created.



After Finalize Employment Contract change closed

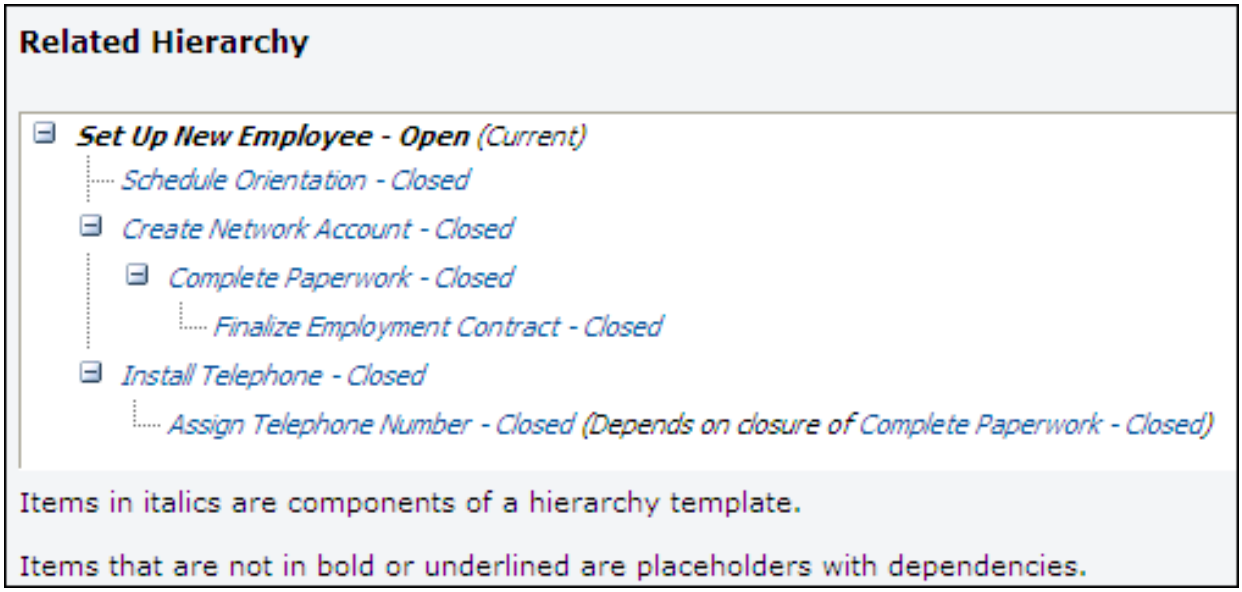


When the Complete Paperwork change is closed, a change will be created from the Create Network Account template. A change will also be created from the Assign Telephone Number template because the change on which it was dependent is closed.



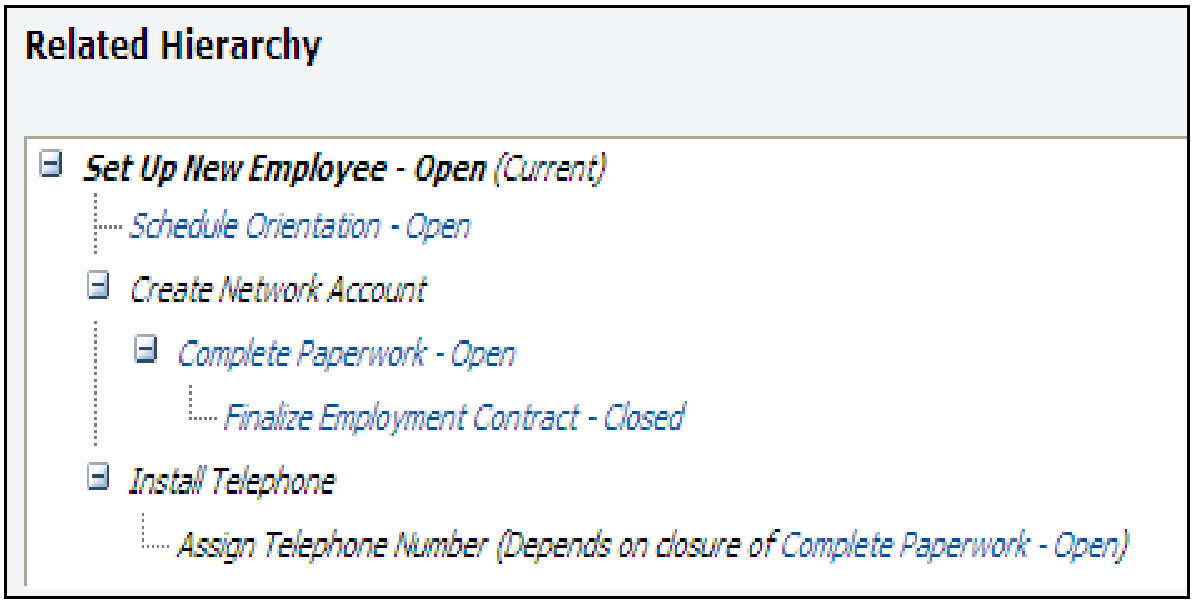
When the Assign Telephone Number change is closed, the Install Telephone change is created.

When the Schedule Orientation, Create Network Account, and Install Telephone changes are closed, the Set Up New Employee change can be closed.

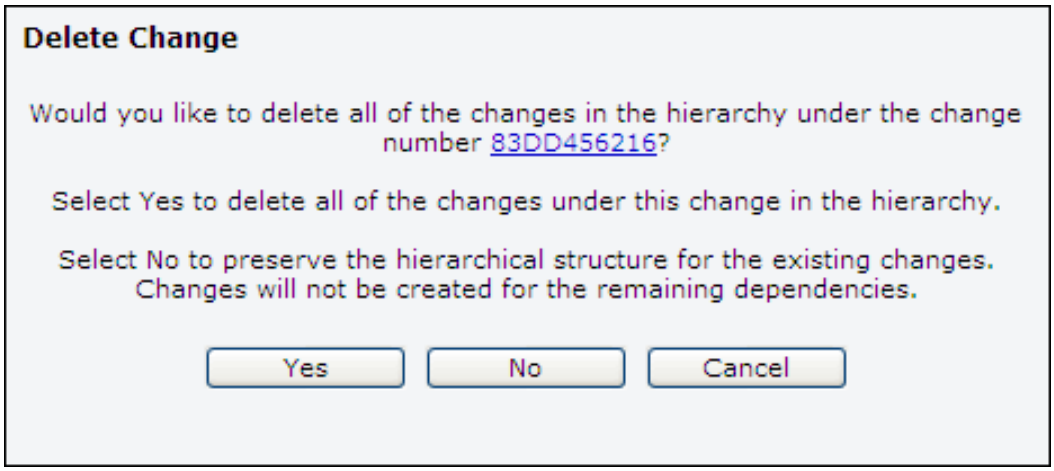


Deleting Lower Level Changes in a Hierarchy Template Structure

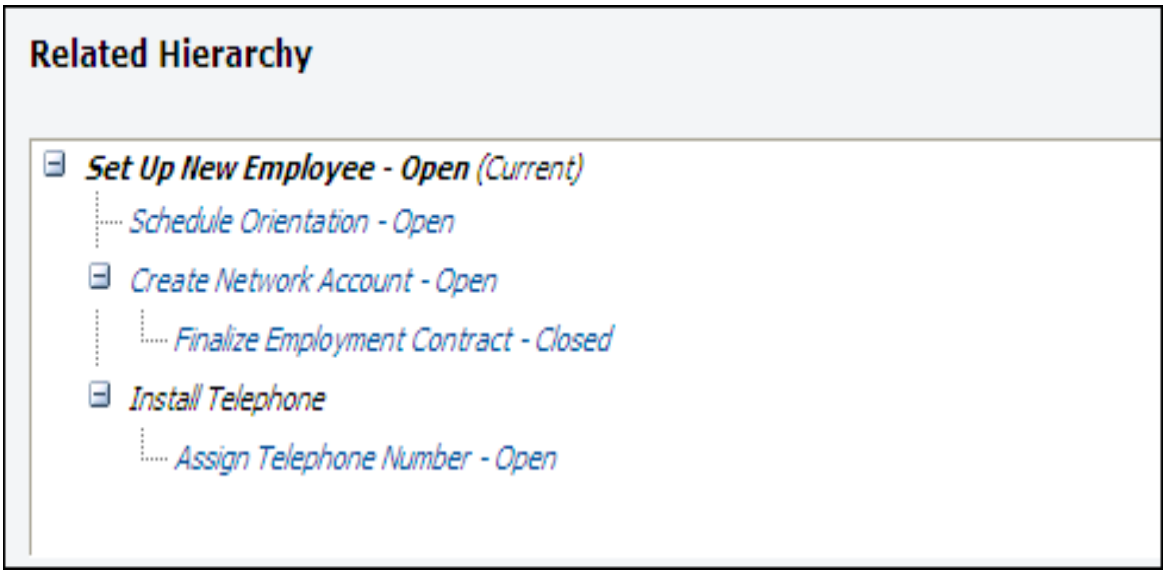
If you delete a change in a lower level of a hierarchy template structure, you have the option of deleting the change's lower level changes. Changes will be created from template placeholders above it if dependencies are met. In the following example:



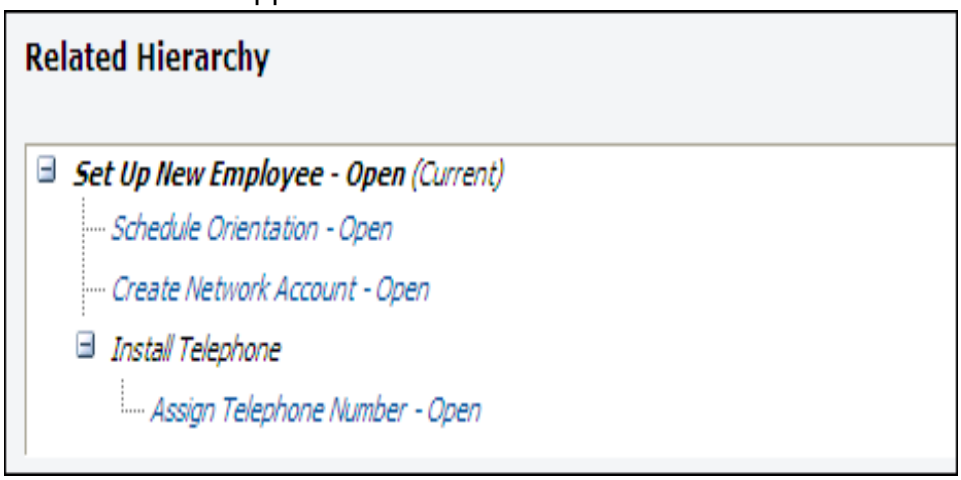
If you delete the Complete Paperwork change, the following appears:



- If you select No (you wish to retain its lower level changes), the lower level changes will go up a level. The structure will appear as follows; note that the Finalize Employment Contract change is now below the Create Network Account change.



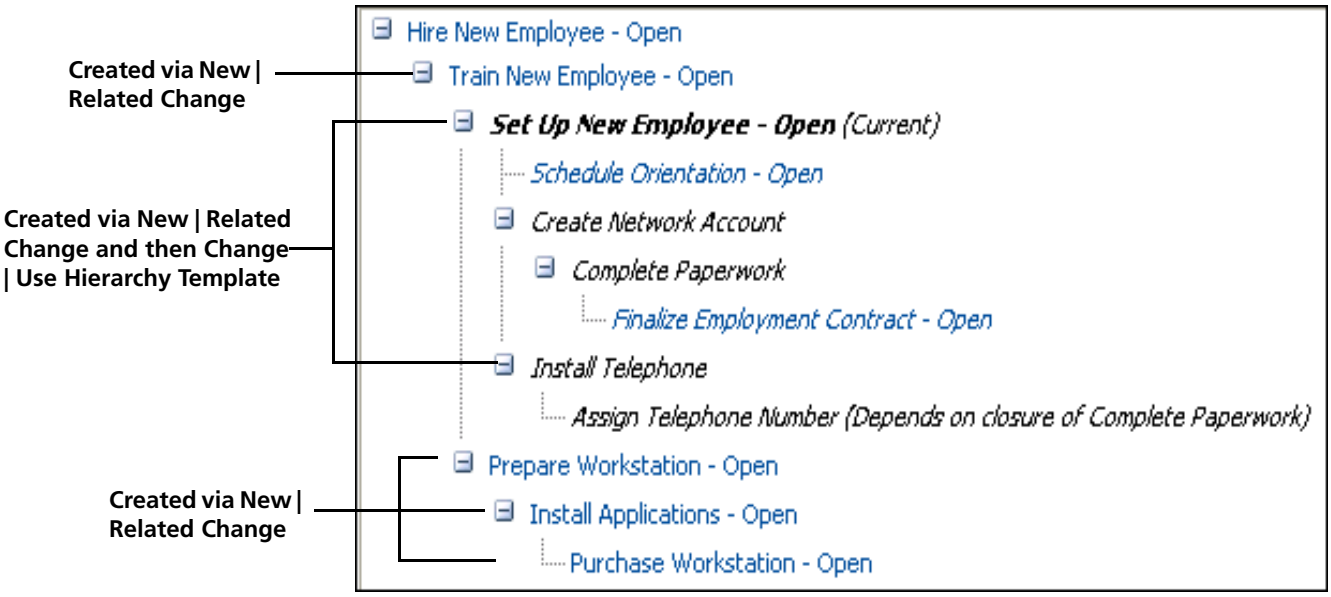
- If you select Yes (you wish to delete its lower level changes), the lower level changes will be deleted. The structure will appear as follows.



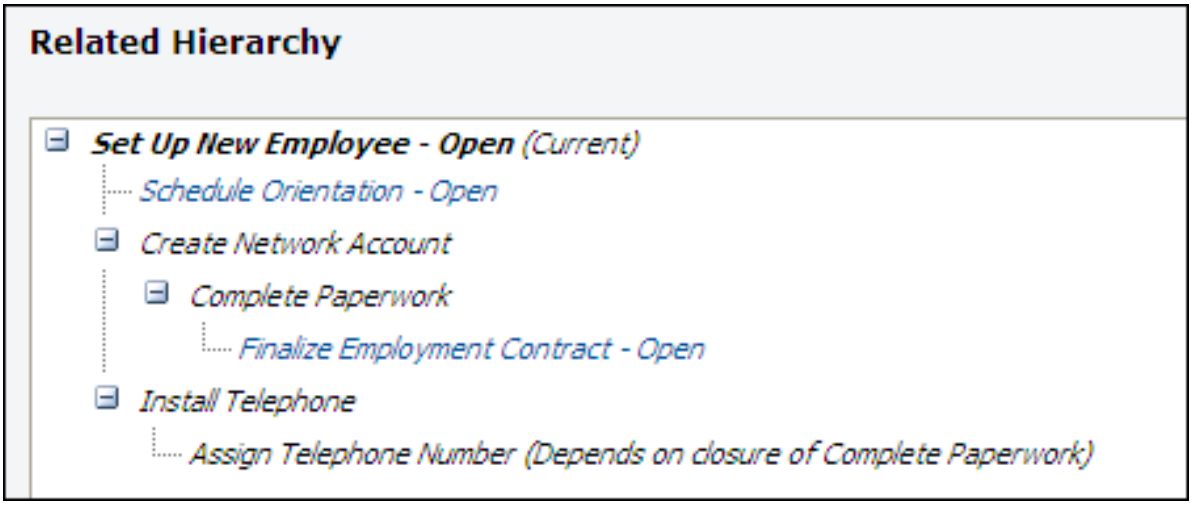
In both cases, a change was created from the Create Network Account template placeholder, which was above the deleted change.

Removing and Deleting a Top Level Change in a Hierarchy Template Structure

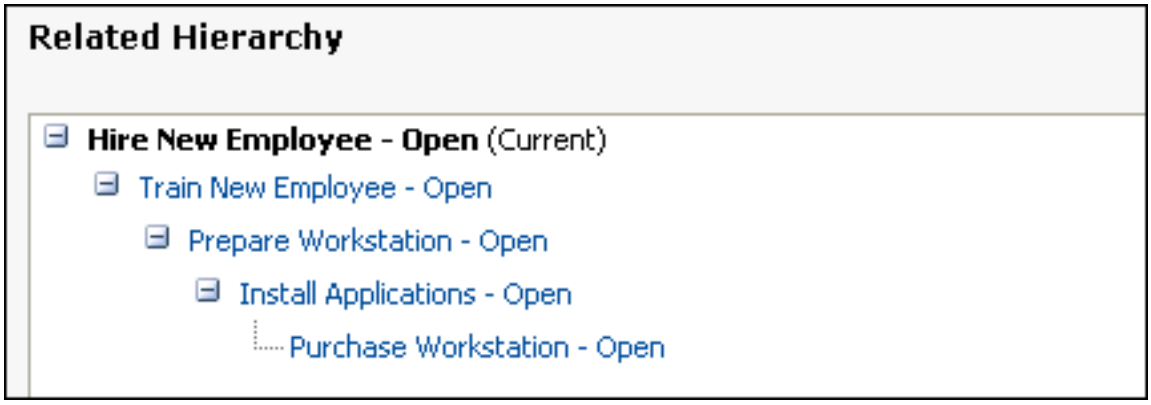
You can remove a top level change and its hierarchy template structure from a larger hierarchy structure. In the following example:



In the Set Up New Employee change, you can select Change | Remove From Hierarchy | Current Change and Dependent Hierarchy. The Set Up New Employee change and its lower levels will become a standalone structure as shown below:

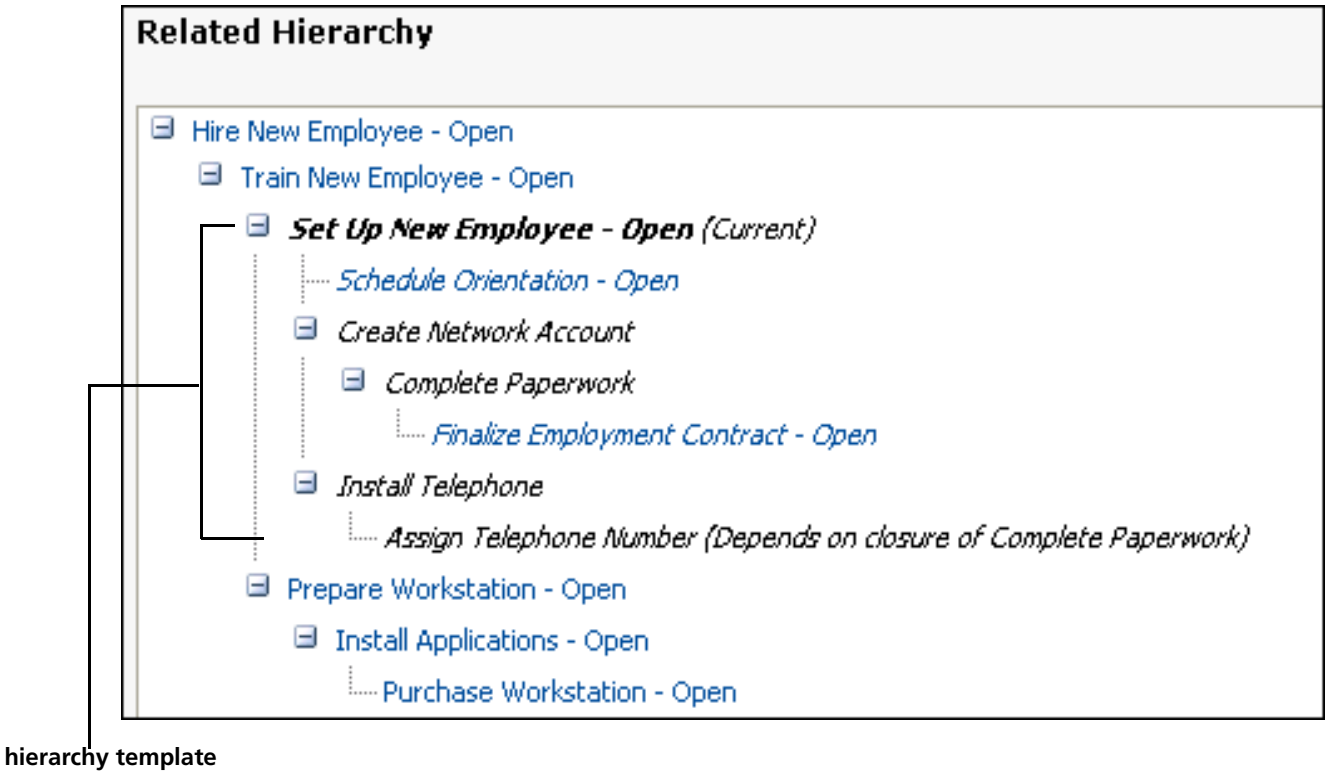


The rest of the structure would appear as follows:

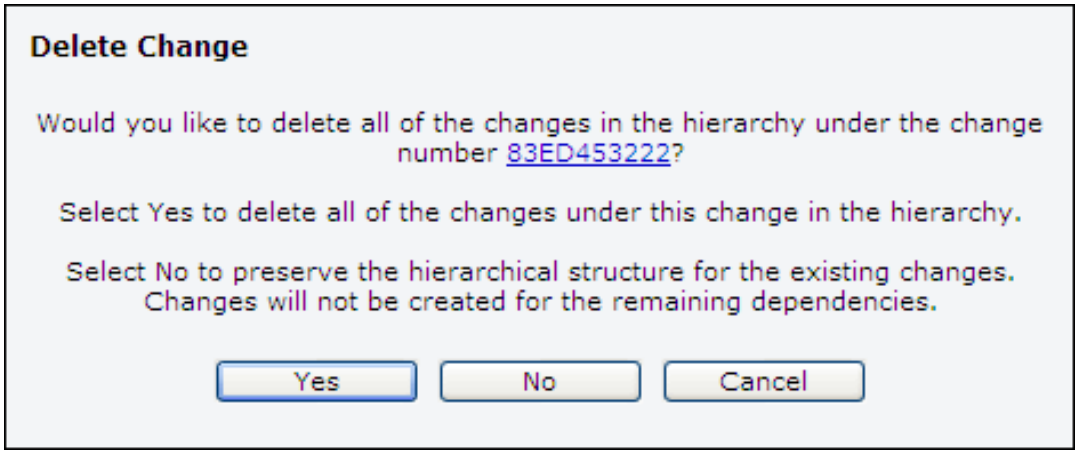


Deleting a Top-Level Change in a Hierarchy Template Structure

When you delete a top level change in a hierarchy template, you'll have the option of retaining its lower level changes. In the example below:



If you delete the Set Up New Employee change, the following prompt appears:



If you select No, the structure would appear as follows.

Related Hierarchy

- Hire New Employee - Open
  - Train New Employee - Open
    - Prepare Workstation - Open
      - Install Applications - Open
        - **Purchase Workstation - Open** (Current)
      - *Schedule Orientation - Open*
      - *Finalize Employment Contract - Open*

Items in italics are components of a hierarchy template.

Items without a status are placeholders with dependencies.

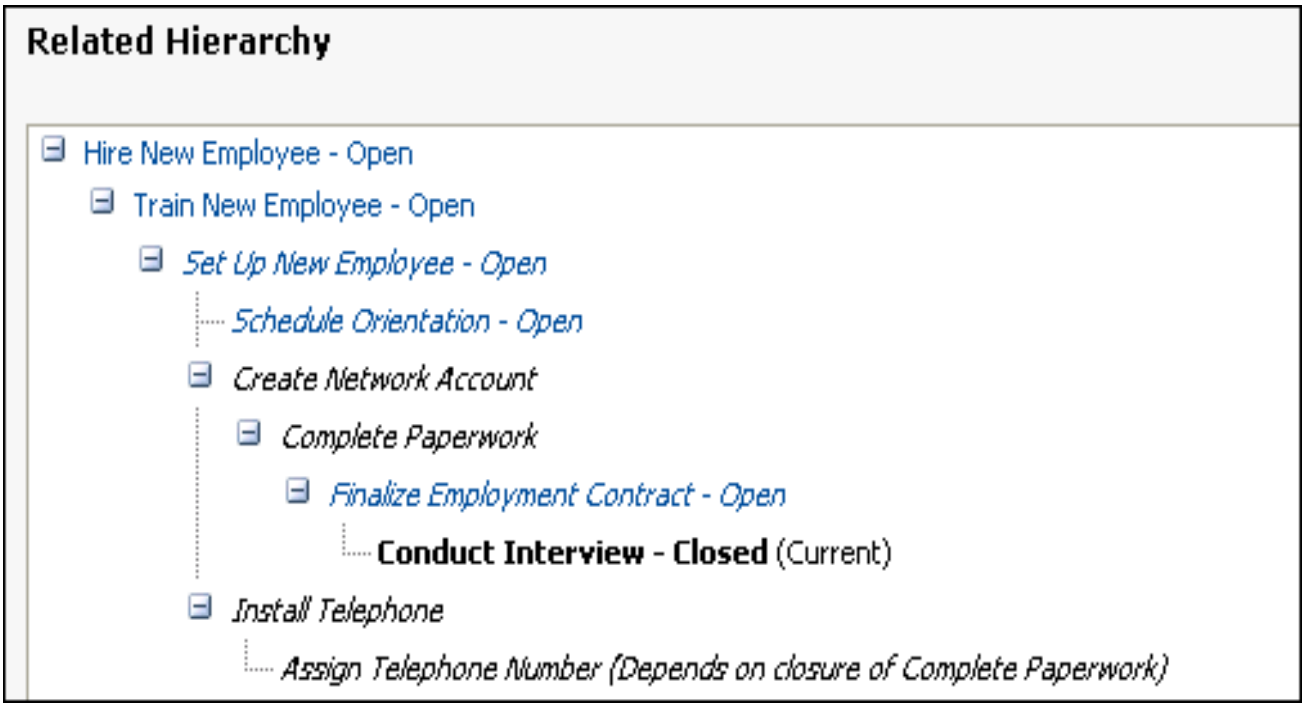
Working With Hierarchy Template and Related Change Structures

When a change structure contains both a dynamic hierarchy (created via the New | Related Change and Change | Add to Hierarchy functions) and a hierarchy template structure, actions of the changes in the dynamic hierarchy do not affect the changes in the hierarchy template structure above it. In the example below:

Related Hierarchy

- Hire New Employee - Open
  - Train New Employee - Open
    - *Set Up New Employee - Open*
      - *Schedule Orientation - Open*
      - *Create Network Account*
        - *Complete Paperwork*
          - *Finalize Employment Contract - Open*
            - **Conduct Interview - Open** (Current)
      - *Install Telephone*
        - *Assign Telephone Number (Depends on closure of Complete Paperwork)*

If you close the Conduct Interview change, the structure is as follows. Note that the changes in the hierarchy template structure are not affected by the closure.



Summary of Change Hierarchy Behaviors

Rules for a change on the top level of a hierarchy template:

- One or more changes can be added dynamically (via New | Related Change or Change | Add to Hierarchy) to the change. The related changes are placed a level below the top level.
- The change and its lower levels, if applicable, can be removed from a dynamic hierarchy (one created via New | Related Change or Change | Add to Hierarchy).
- When the change is deleted, a prompt appears with the option to delete its lower level changes. All placeholders in its lower levels are deleted.
- When the change is closed, its lower level changes will close. Any placeholders in its lower levels are deleted.

Rules for a change in a lower level of a hierarchy template:

- A change can be added dynamically (via New | Related Change or Change | Add to Hierarchy) to the change. The added change will be placed on a lower level.
- The change cannot be removed from the hierarchy template structure.
- When the change is closed, a prompt appears with the option to close its lower level changes.
- When the change is deleted, any placeholders in the levels above it will be created if other dependencies are satisfied. A prompt appears with the option to delete its lower level changes.

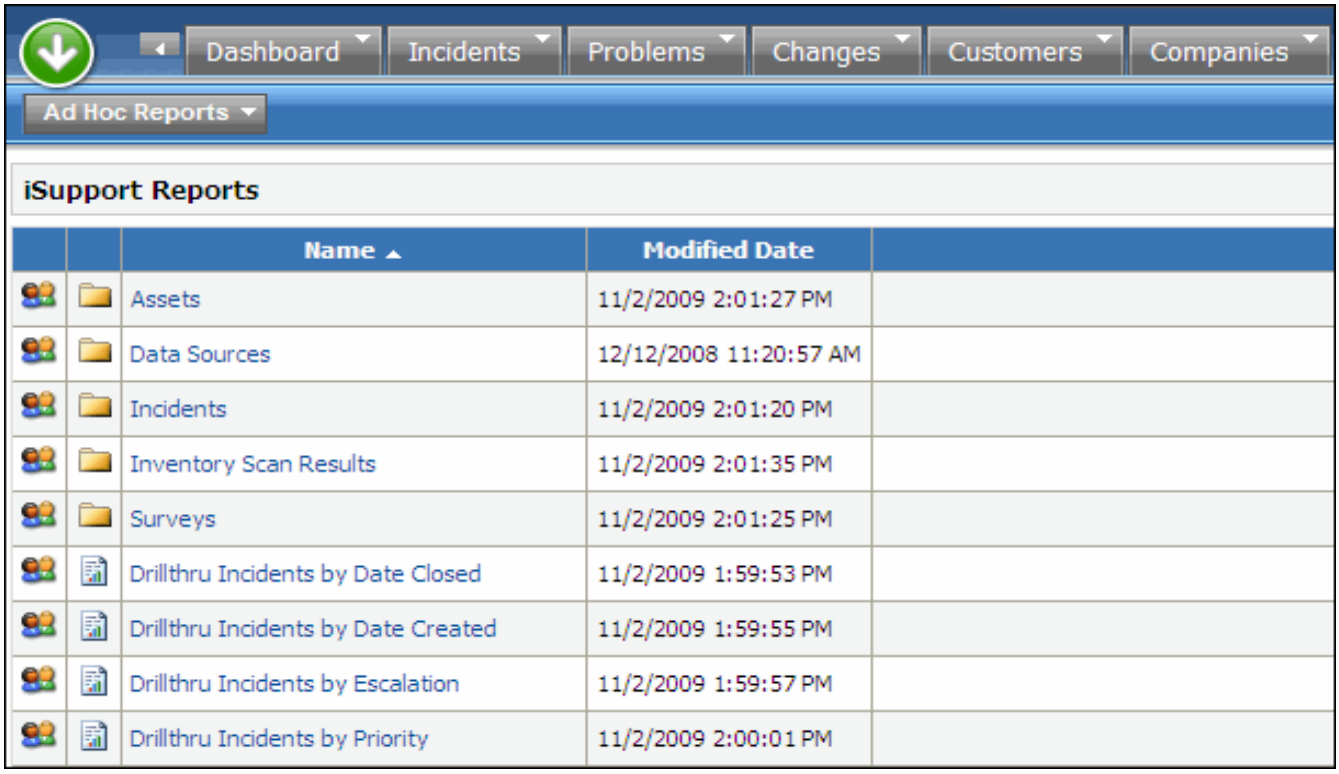
Rules for a change in a dynamic hierarchy (one created via New | Related Change or Change | Add to Hierarchy):

A change can be added dynamically (via New | Related Change or Change | Add to Hierarchy) to the change. The added change will be placed on a lower level.

- The change can be removed from the dynamic hierarchy and will become an independent change.
- The changes in the levels lower than the change can be removed from the dynamic hierarchy (retaining their structure).
- The change and its lower levels can be removed from the dynamic hierarchy (retaining their structure).
- When the change is closed/deleted, a prompt appears with the option to close/delete its lower level changes.
- The actions of a change in a dynamic hierarchy will not affect the dependencies of any hierarchy template above it.

8 Generating Reports

iSupport's SQL reporting functionality is accessible if you have iSupport's Report Viewer permission.

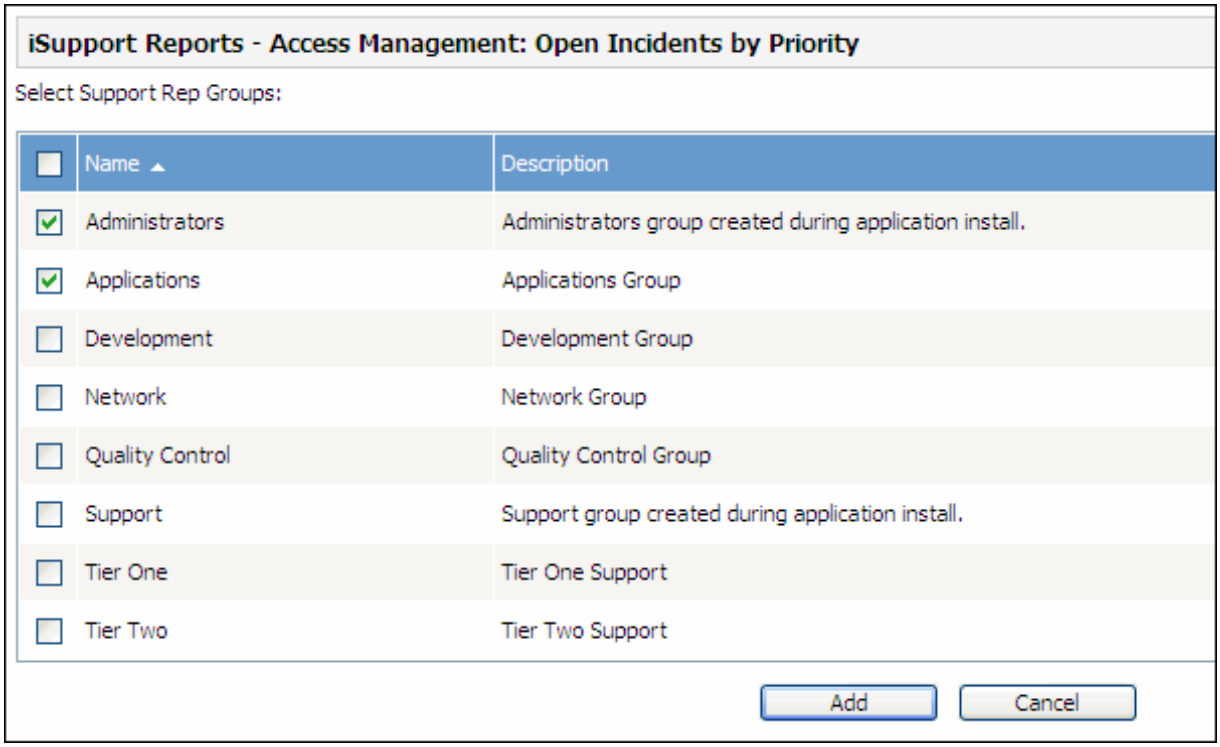


Viewing a Report

To display a report, click on its title. The report appears in a Report Viewer with paging, zoom, search, and print options. Note that due to a limitation in Microsoft's RSClientPrint control, iSupport's SQL Report Viewer functionality is only supported with Microsoft® Internet Explorer®. Mozilla® Firefox®, GoogleTM Chrome, and Apple® Safari® can be used to view a report, but certain reporting features are not supported with those browsers. You can export a report in one of the following formats: XML file with report data, CSV (comma delimited), TIFF, Acrobat (PDF), Web archive, and Excel.

Access to SQL-based iSupport reports and report folders can be restricted via group access permissions; if the Manage Folders and Reports permission is enabled in your Support Representative Profile record, the Group Access icon will appear next to the folders and

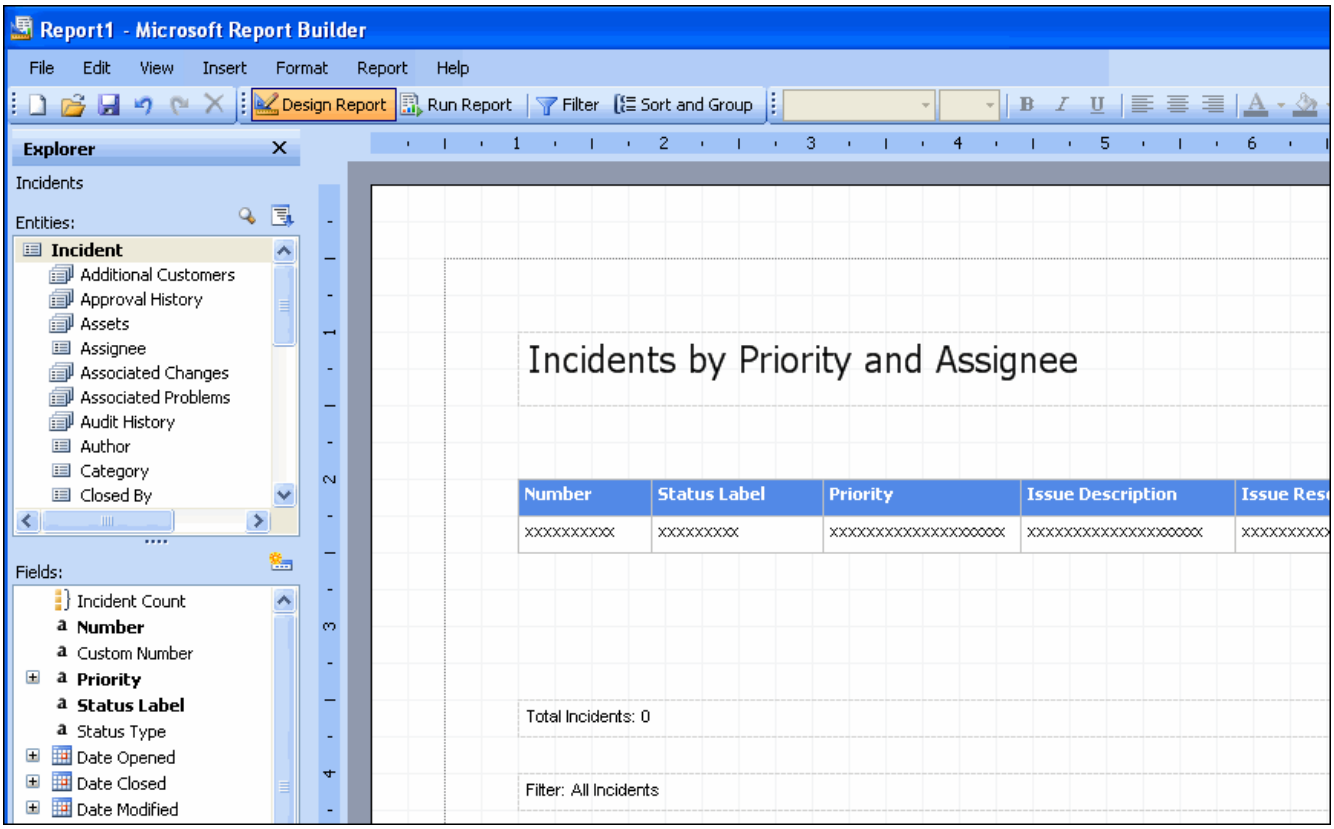
reports on the Reports tab. Click the icon to display the following dialog for selecting the support representative groups that can access the report or folder.



Creating an Ad Hoc Report

iSupport includes report models of iSupport database data built with Microsoft Report Designer. If you have a version of Microsoft SQL Server 2005 other than Express Edition, you can create reports based on these models using Microsoft Report Builder and Microsoft Report Designer. If you have iSupport's Ad Hoc Reports permission, you can access Microsoft Report Builder via the iSupport Reports tab to create ad hoc reports using a simple drag and drop interface. You can view SQL reports via the Reports tab or Report Viewer on the Desktop if the report is saved in the iSupport/

Reports folder (or any subfolder underneath it) on your report server. More information on this feature is available by selecting Ad Hoc Reports | Documentation on the Desktop Reports tab.



9 Authoring and Accessing Knowledge Entries

Overview

iSupport's knowledge functionality enables you to author, approve, and access knowledge entries.

Authoring Knowledge Entries

Authoring knowledge involves creating a standard entry that includes a category set, issue description, resolution.

- From the Desktop, you can create a standard knowledge entry that includes a category set, issue description and resolution, cause, error messages, steps, URL, and attachments.
- From the Incident or Problem (if enabled) screen, when an incident or problem is closed, a prompt displays regarding whether the entry should be added to the knowledge base. When the user selects Yes, the categorization, description, and resolution will be used to create a knowledge entry. If approvals are enabled, the entry is assigned a Pending Approval status. If approvals are not enabled, the entry is assigned an Approved External status.

While a knowledge entry is being drafted, you can assign the In Progress status to the entry.

Approving/Declining Knowledge Entries

If approvals are enabled, do the following after you create a knowledge entry from the Desktop or the Incident Screen by selecting New | Knowledge Entry:

- If you **are not** a knowledge approver in your Support Representative record, select one of the following in the Status field:
  - **In Progress** to continue working on the entry.
  - **Pending Approval** to include the entry in the Pending Approval folder in the Knowledge view on the Desktop.
- If you **are** designated as a knowledge approver in your Support Representative record, select one of the following in the Status field:
  - **In Progress** to continue working on the entry.

- **Pending Approval** to include the entry in the Pending Approval folder in the Knowledge view on the Desktop.
- **Approved External** to make the knowledge entry available for viewing on the Desktop, End User Desktop, and Incident, Problem, and Change (if enabled) screens.
- **Approved Internal** to make the knowledge entry available for viewing on the Desktop and Incident, Problem, and Change screens.
- **Declined** to decline the entry. A prompt will display for the reason why the entry was declined, and the reason will display on the entry. The entry will be included in the Declined folder in the Knowledge view on the Desktop so that the submitter can view, edit, and resubmit it if necessary.

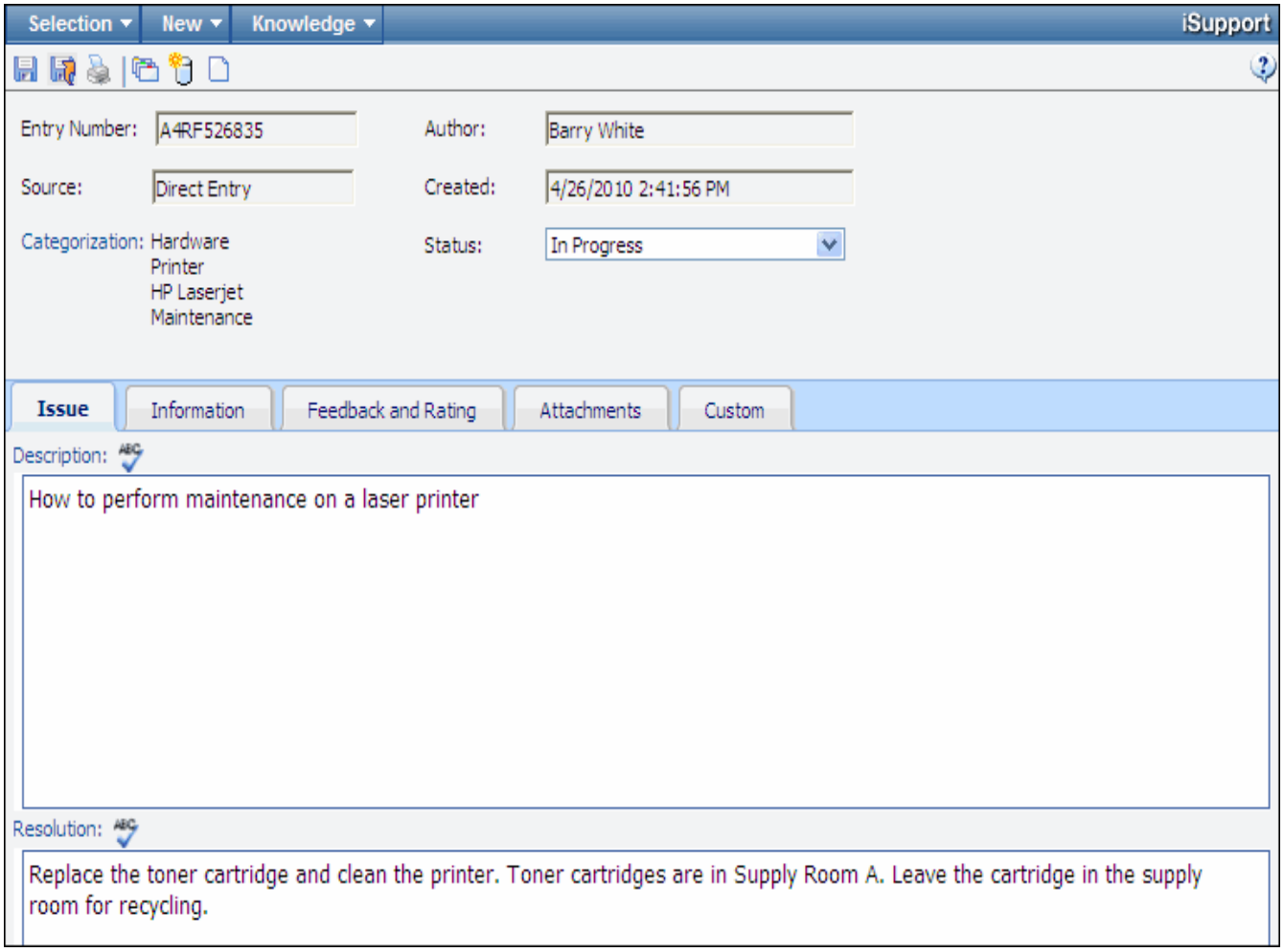
After a knowledge entry is approved, only those designated as an approver can update it. Searches for knowledge entries can be performed from the End User Desktop or the Incident, Problem, and Change screens. The search is based on the classification (if categories are enabled) using the Find | Knowledge for Categorization feature.

If the feedback and rating feature is enabled, users can add comments and rate knowledge entries. The results of the ranking will be used to order returned entries when searches are performed. You can also enable a usefulness prompt to appear when the user exits the Knowledge Entry screen and track the number of Yes and No answers.

The *iSupport Administrator's Guide* contains information on enabling and configuring knowledge functionality.

Creating Knowledge Entries

To create a knowledge entry from the Desktop, select Create | Knowledge Entry.



Use the following fields to classify and enter basic information regarding the knowledge entry.

Field	Description
Entry Number	A system-generated number assigned to the entry.
Source	Enter information on where the knowledge entry originated. By default: ■ "Direct Entry" appears if the entry was created via the Desktop. ■ "Incident Ticket" appears if the entry was created after a incident was closed and the support representative answered Yes to the "Create knowledge entry?" prompt. ■ "Known Error" if the entry was created after a Problem record (if enabled) was closed and the support representative answered Yes to the "Create knowledge entry?" prompt.

Field	Description
Categorization	If categories are enabled, click the Categorization link, select Knowledge | Categorize, or click the Categorization icon to assign a category set that describes the issue. In the Incident, Problem, and Change (if enabled) screens, categories are used in knowledge entry searches. On the End User Desktop, knowledge entries (that are approved for external use) can be displayed by categorization.
Author	The name of the person creating the knowledge entry.
Created	The date and time when the knowledge entry was created.
Status	The following applies if approvals are enabled. If you **are not** designated as a knowledge approver in your Support Representative record, "In Progress" appears as default. Select Pending Approval when you are ready to make the entry available in the Pending Approval folder in the Knowledge view on the iSupport Portal. If you **are** designated as a knowledge approver, select one of the following: ■ **In Progress** to continue drafting the entry. ■ **Approved External** to make the knowledge entry available for viewing on the Desktop, End User Desktop, and Incident, Problem, and Change (if enabled) screens. ■ **Approved Internal** to make the knowledge entry to be available for viewing on the Desktop and Incident, Problem, and Change screens. ■ **Pending Approval** to include the entry in the Pending Approval folder in the Knowledge view on the Desktop. If approvals are disabled, you can select Approved External or Approved Internal, or In Progress in the Status field.

Entering the Issue Description and Resolution

Use the fields on the Issue tab to enter a detailed description of the issue and resolution.

The Find | Knowledge for Categorization feature in the Incident, Problem, and Change (if enabled) screens searches for knowledge entries based on categorization. When a knowledge entry is found, the Capture Solution feature will paste the issue description and resolution from the knowledge entry into the record.

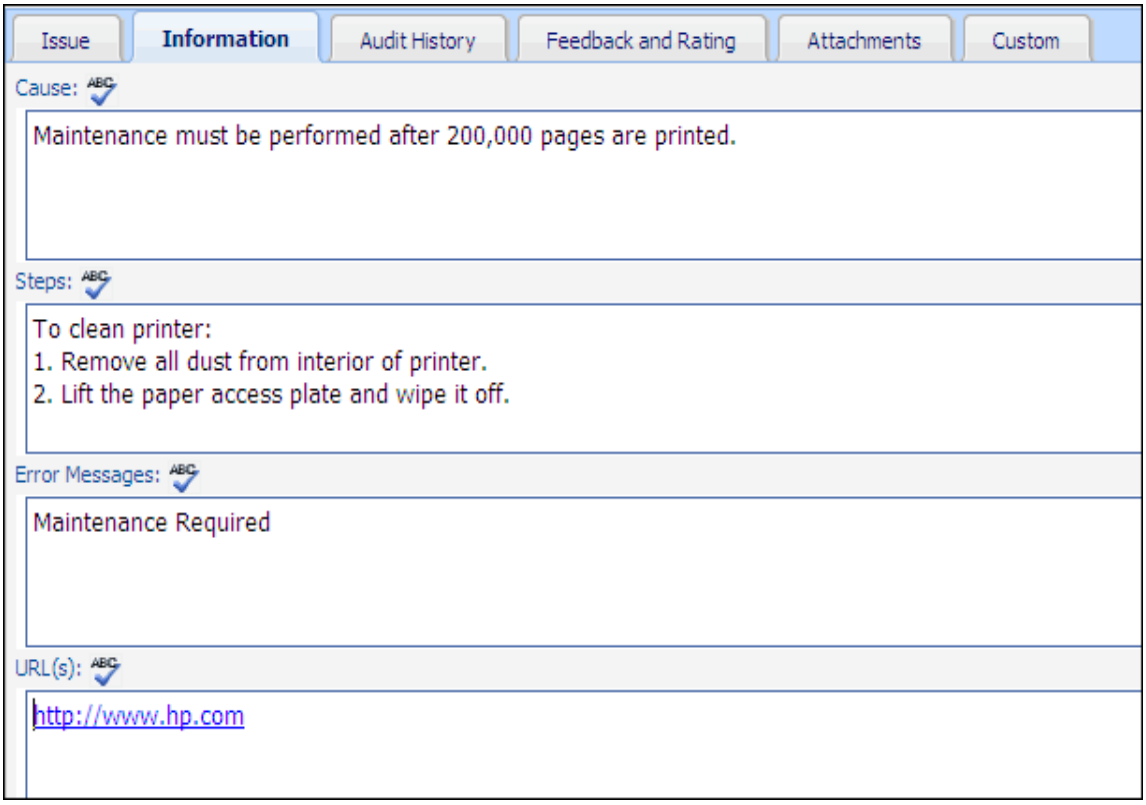
If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Description and Resolution fields; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Entering Supporting Information

Use the Information tab to enter more information about the issue and resolution, including the cause, steps, error messages, and URL.



Field	Description
Cause	Enter a detailed description of the cause of the issue. To display a larger window for entering the cause, click the Cause link.
Error Messages	Enter the error message(s) involved in the issue. To display a larger window for entering the error messages, click the Error Messages link.
Steps	Enter the steps to resolve the issue. To display a larger window for entering the steps, click the Steps link.
URL(s)	Enter the URL(s) to consult for more information on the issue or resolution.

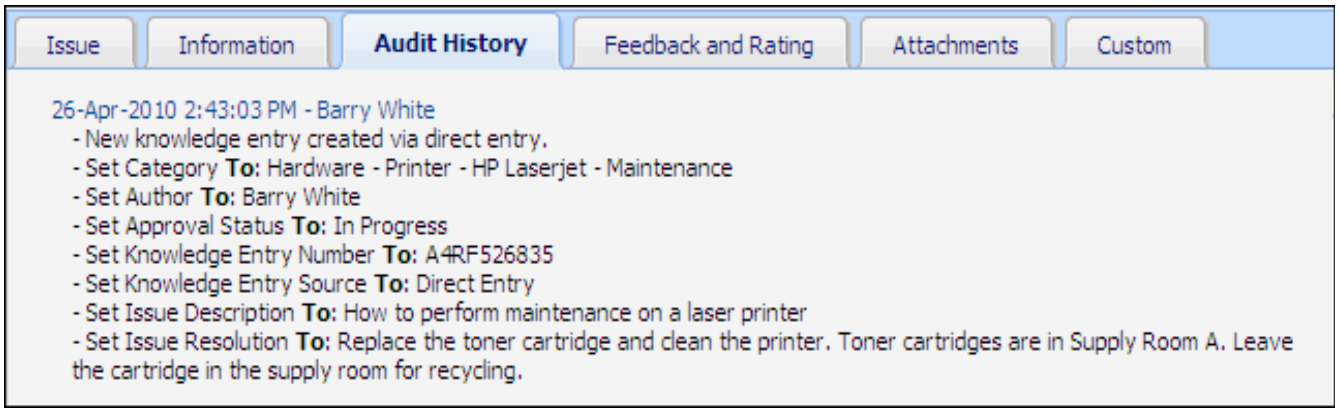
If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in any of these fields; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information.

You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Viewing Audit History

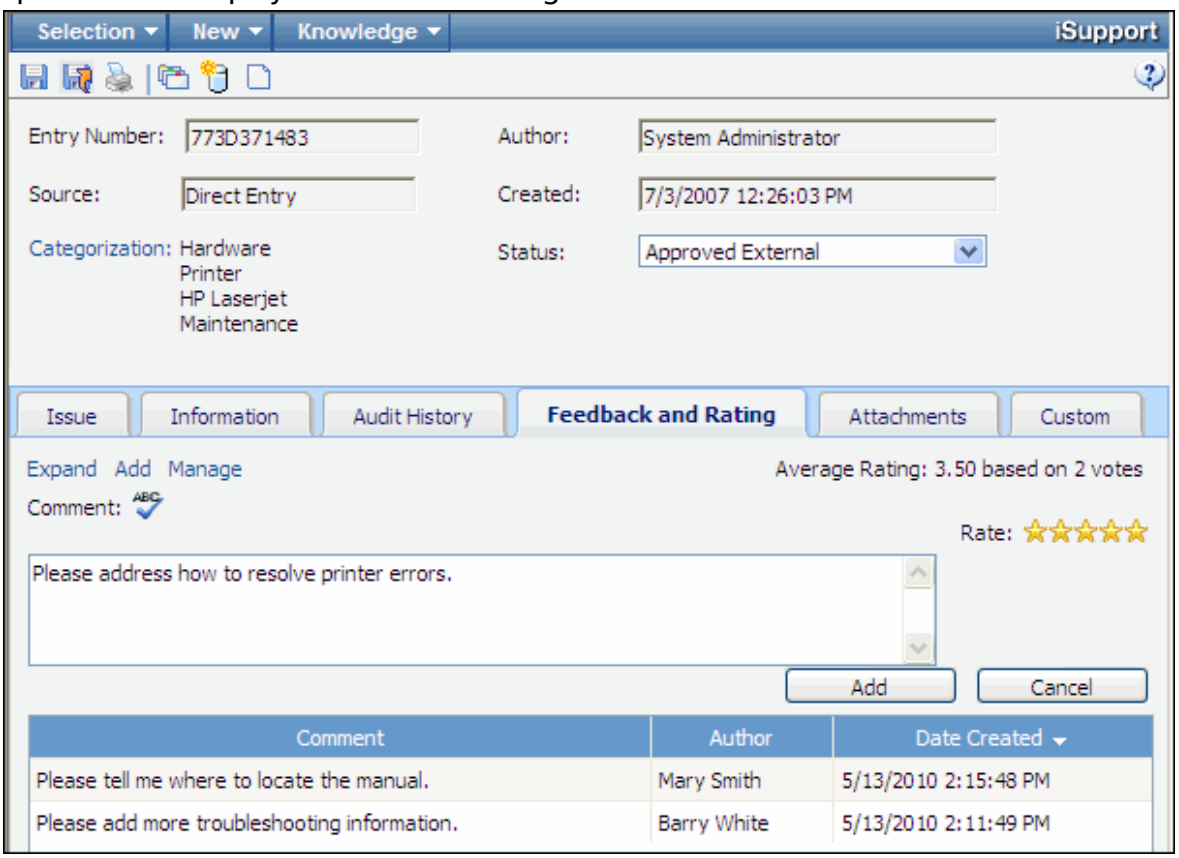
After you save a Knowledge Entry record, an entry appears in the Audit History section. This section includes a notation of every action performed on the record with the date, time, and author stamp.



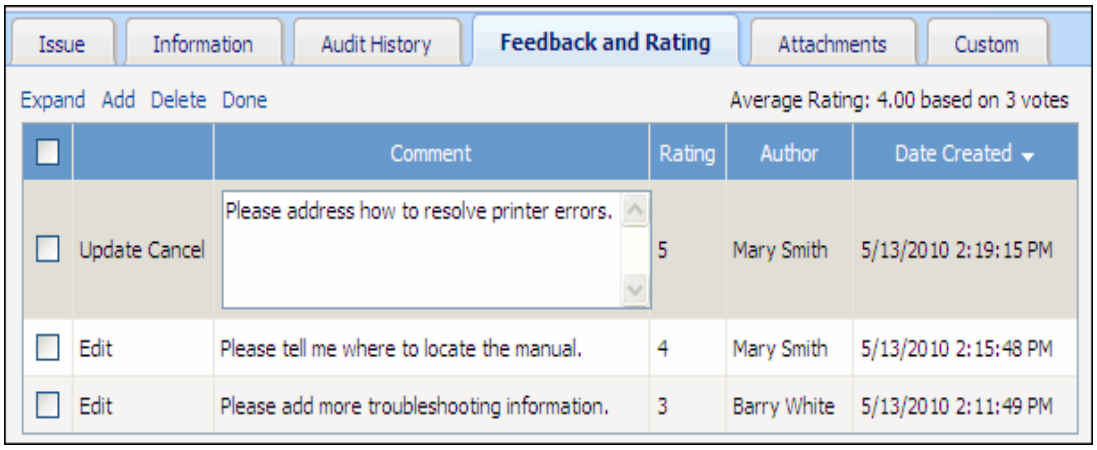
Rating and Entering Feedback

If the Feedback and Rating feature is enabled in the Configuration module, you can rank knowledge entries on usefulness and add feedback comments. When future searches are performed, the results of the ranking will be used to order the returned entries. You can add, change, and delete comments if you are designated as a knowledge approver; otherwise you can only view comments.

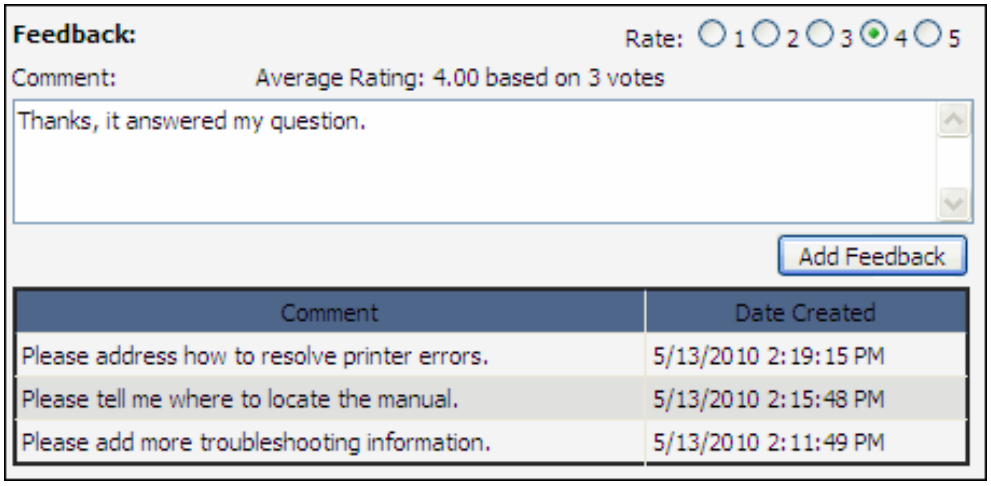
To add a rating, click Add and then click the stars next to the Rate field. Enter any comments, using the Expand link to display the entries in a larger window.



Click the Manage link to change a comment or delete a feedback entry. If changing a comment, click the Edit link to display the editing field as shown below; change the comment and then click the Update link. Click the Done link when finished.

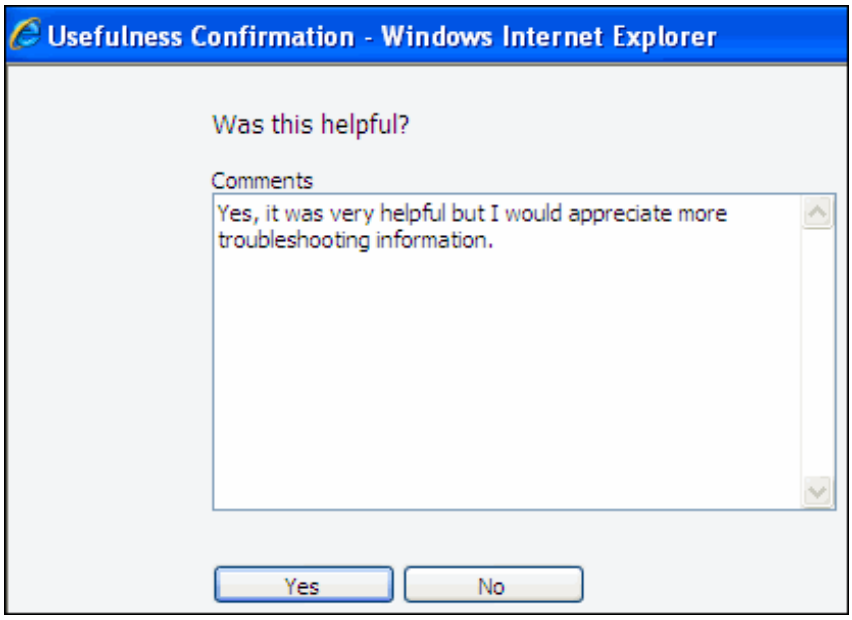


On knowledge entries accessed via the End User Desktop, the following will appear:



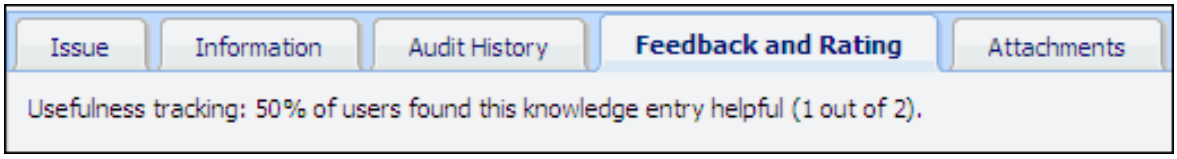
Providing Usefulness Feedback

If the Usefulness Tracking feature is enabled in the Configuration module, on knowledge entries accessed via the iSupport Desktop, a prompt will appear if the Close icon in the upper right corner of the screen or the Close Window menu option is used when exiting the Knowledge Entry screen. The text of the question and comment box are set in configuration.



After clicking Yes or No, a "Your feedback has been registered" verification prompt will appear. Nothing will be tracked if you click the Close icon in this dialog.

The following will appear on the Feedback and Rating tab in the Knowledge Entry screen: *(% of Yes answers)* of users found this knowledge entry helpful *(<number of Yes answers>* out of *<total number responding>)*



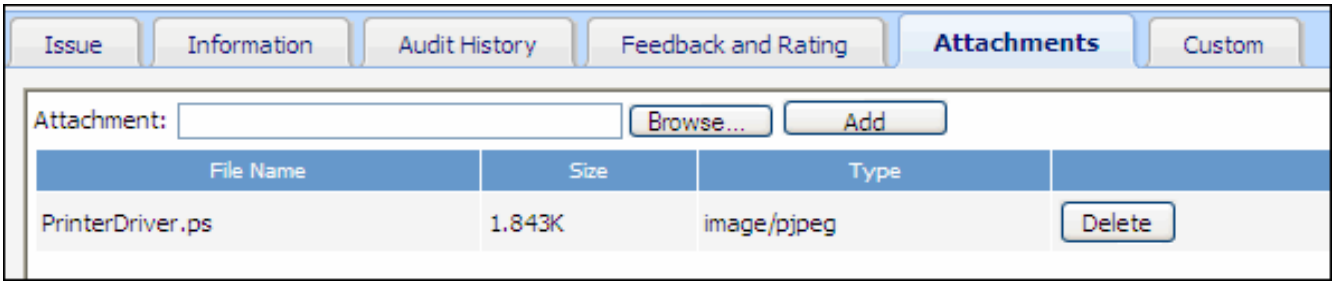
On knowledge entries accessed via the End User Desktop, the following will appear:

Nothing will be tracked if the user exits this window without an entry.

You can use the Knowledge Usefulness by Date Created shared view to display usefulness tracking statistics.

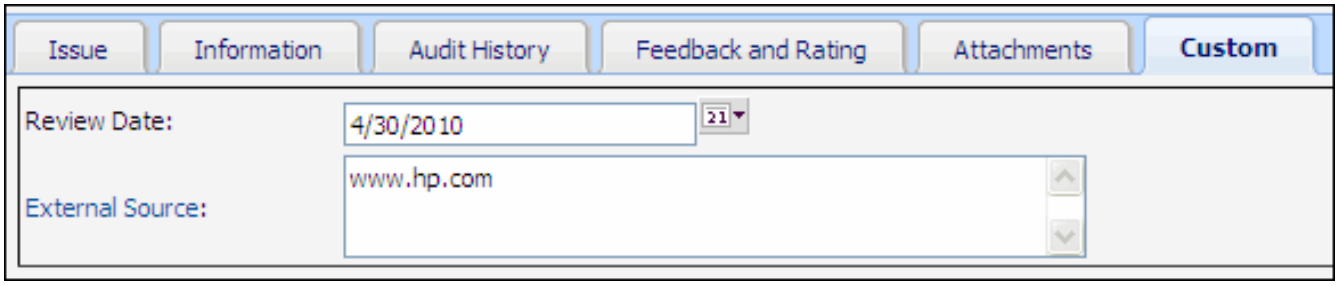
Attaching Files

To attach a file to the knowledge entry, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.



Completing Custom Fields

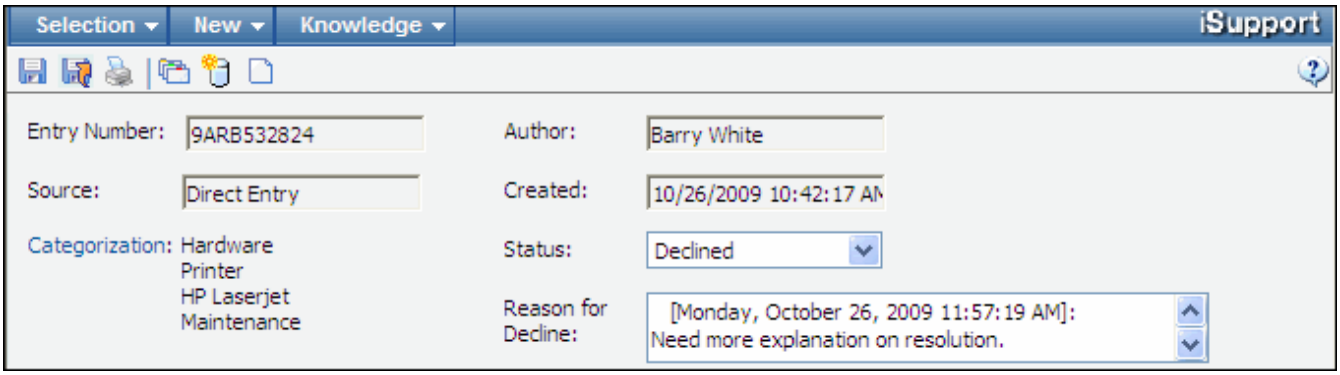
The fields on the customizable tab are used to enter information specific to your company. The name of the tab is specified during configuration. You may be required to enter information in these fields. If a record is recategorized, data saved in custom fields is retained and the custom fields associated with the newly-selected category set are added.



Approving/Declining Knowledge Entries

If approvals are enabled:

- If you **are not** designated as a knowledge approver in your Support Representative record, select one of the following in the Status field to submit it for approval by a knowledge approver.
  - **In Progress** to continue working on the entry.
  - **Pending Approval** to include the entry in the Pending Approval folder in the Knowledge view on the Desktop.
- If you **are** designated as a knowledge approver in your Support Representative record, select one of the following in the Status field:
  - **In Progress** to continue working on the entry.
  - **Pending Approval** to include the entry in the Pending Approval folder in the Knowledge view on the Desktop.
  - **Approved External** to make the knowledge entry available for viewing on the Desktop, End User Desktop, and Incident, Problem, and Change (if enabled) screens.
  - **Approved Internal** to make the knowledge entry available for viewing on the Desktop and Incident, Problem, and Change screens.
  - **Declined** to decline the entry. A prompt will display for the reason why the entry was declined, and the reason will display on the entry.



The entry will be included in the Declined folder in the Knowledge views on the Desktop so that the submitter can view, edit, and resubmit it if necessary.

After a knowledge entry is approved, only those designated as an approver can update it. If approvals are disabled, you can select Approved External or Approved Internal, or In Progress in the Status field.

Saving Knowledge Entries

To save a knowledge entry, select Save from the Selection menu, click the Save icon, or click the Save and Close icon.

Creating New Records

Click the New Knowledge Entry icon to create another knowledge entry. Click the New Incident icon to display the Incident screen for creating an incident.

Printing Knowledge Entries

To print a knowledge entry, select Print from the Selection menu.

Deleting Knowledge Entries

To delete a knowledge entry, select Delete from the Selection menu.

Accessing Knowledge Entries

Knowledge entries can be accessed by:

- Support representatives via the Desktop and Incident, Problem, and Change (if enabled) screens
- Customers via the End User Desktop

Accessing Knowledge Entries from the Incident, Problem, and Change Screens

After categorizing in the Incident, Problem, and Change (if enabled) screens, select Find | Knowledge for Categorization. Knowledge entries with the selected categorization will display in a list as shown in the example below.

View Related Knowledge Entries

Description ▲	Resolution	Category	Status	Average Rating ▼
How do I replace a network cable on a laptop?	Purchase Etherlink III Lan PC card and cable from Computer Warehouse Inc. and attach to laptop. Confirm that the cable has both 10 mb and 100 mb lights.	Connection	Approved External	0.00

Displaying Knowledge Entries and FAQs on the End User Desktop

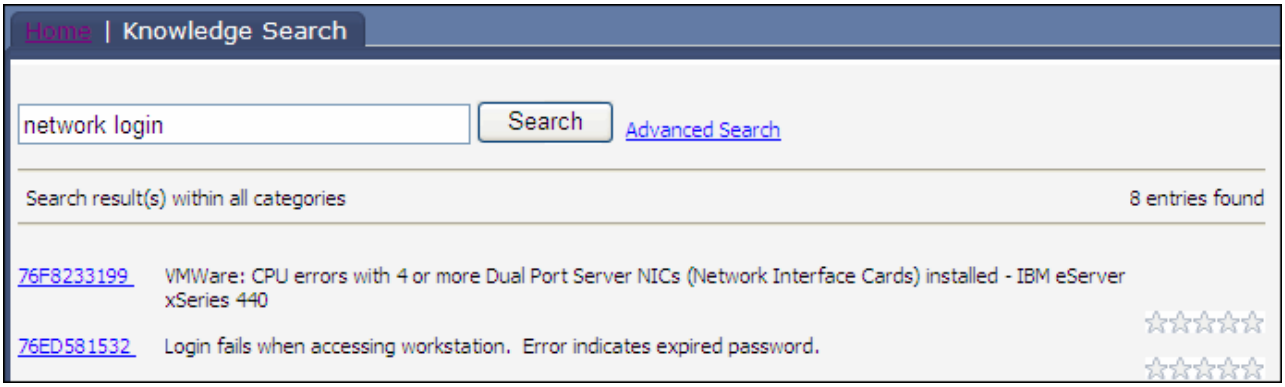
Knowledge Entries

A list of all knowledge entries that have been designated as Approved External can be configured to appear on the iSupport End User Desktop. iSupport performs full text searches, so entries are

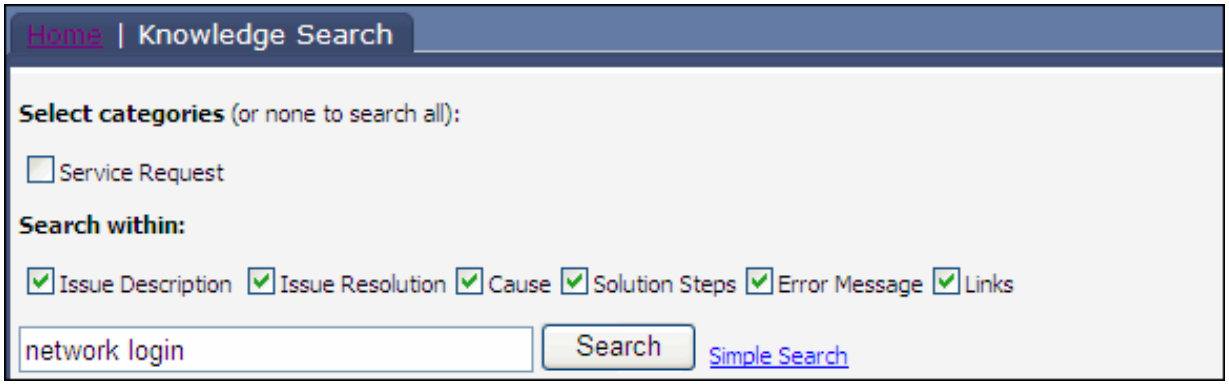
returned if a match is found with any word in the phrase and different tenses of words are also used in the search. Noise words (commonly used words that not useful to searching such as "a," "and," and "the") are left out of the full-text index.

Customers can use the Simple Search to enter a full or partial word or phrase and perform the search.

Search results display in a list.



Use the Advanced Search link to display fields for searching knowledge entries associated with one or more categories and/or search specified knowledge entry fields.



When a customer categorizes an incident via the End User Desktop and there are one or more knowledge entries with categories that match the selection, a View Knowledge for Selected

Category link will appear for accessing the entries. If configured, feedback and rating fields may appear for customers to provide comments and rate knowledge entries.

Home | Knowledge Search | **Knowledge**

Category: Administration
Existing Employee
Workstation
Login

Number: 76ED581532

Issue: Login fails when accessing workstation. Error indicates expired password.

Resolution: User ignored multiple prompts to reset password for security purposes as dictated by company policy and network administrator.

A department manager must be notified of issue and to obtain approval to reset password for user. Approval email must be associated to ticket for documentation. Inform user that department manager will be notified.

Reset password as indicated once department approval is received.

Review Date: 4/30/2010
External Source: None

Was this helpful? Yes No

Submit Usefulness Feedback

Feedback: Rate: 1 2 3 4 5

Comment: Average Rating: 4.00 based on 3 votes

Thank you, this answered my question.

Add Feedback

Comment	Date Created
Please address how to resolve errors.	4/27/2010 1:46:06 PM
Please tell me where to locate the manual.	4/27/2010 1:39:54 PM
Please add more troubleshooting information.	4/26/2010 3:57:37 PM

FAQs

This option displays a list of frequently asked questions; when a user clicks the Read link, the answer appears along with a Learn More link for displaying the information in a larger window. You can create topics to sort FAQs on the Desktop and End User Desktop.

Frequently Asked Questions

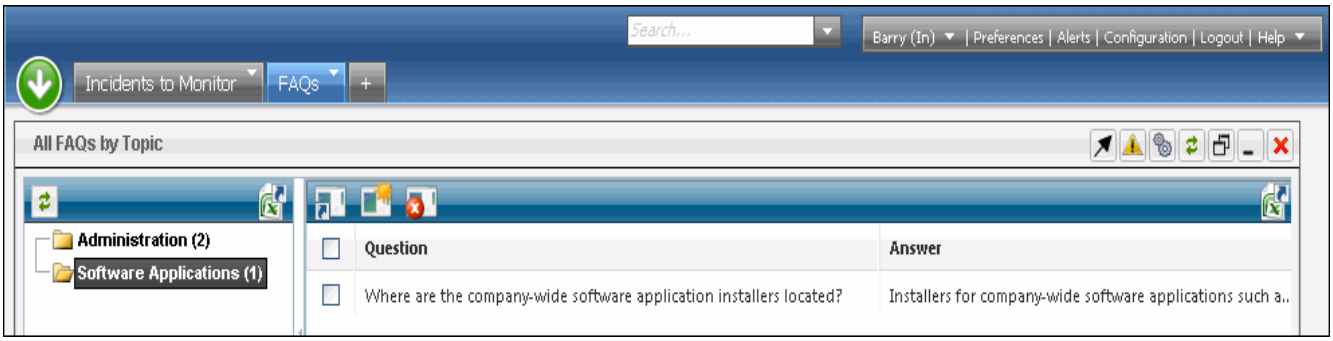
Today's Topics
Administration (2)
Software Applications (1)
Read Where are the company-wide software application installers?

Q: Where are the company-wide software application installers?
A: Installers for company-wide software applications such as Microsoft Office and Adobe Reader are on the Admin server in the Installers directory.

Learn More

Entering FAQs

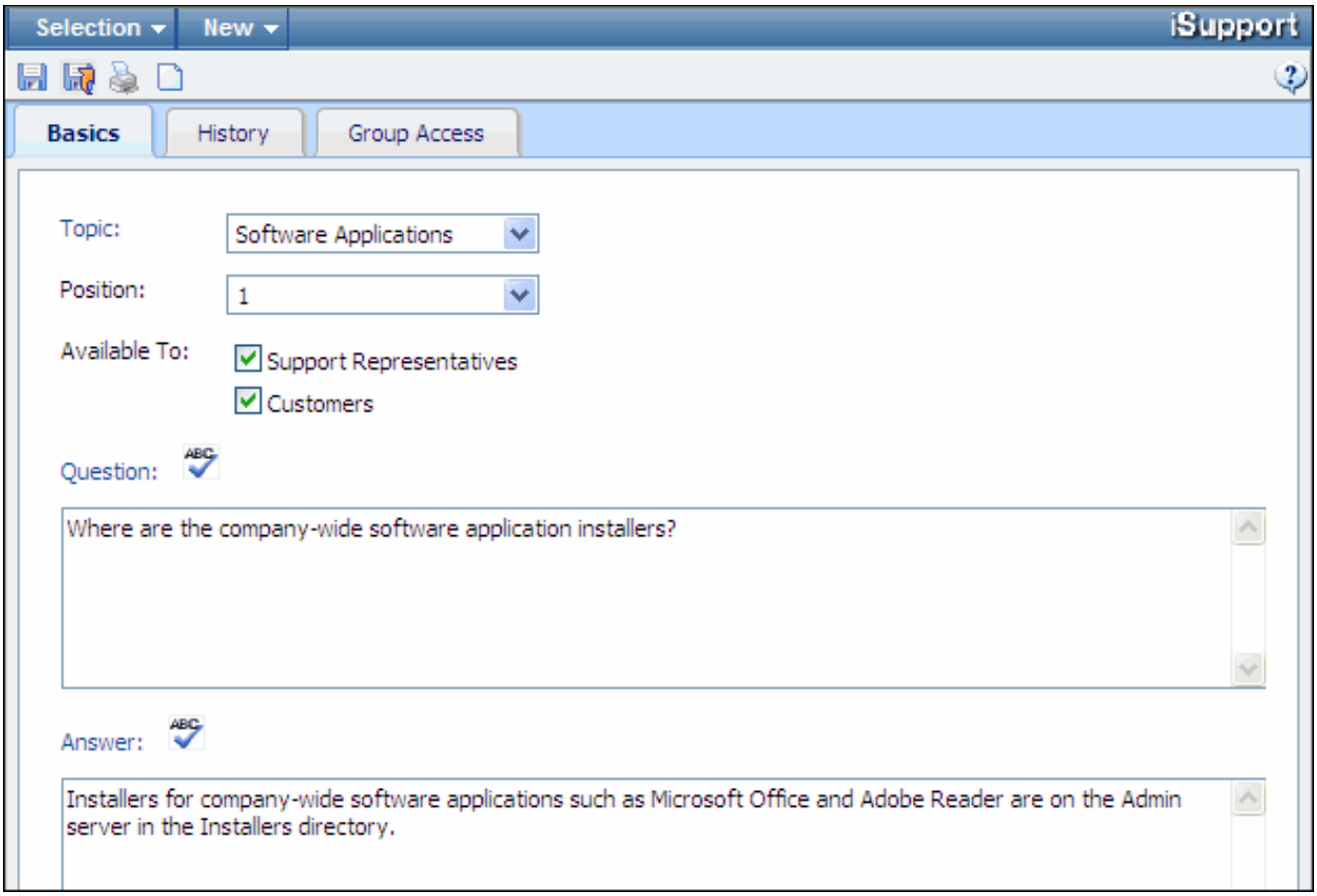
Frequently asked questions (FAQs) are informational documents in question and answer format. You can create topics to sort FAQs on the Desktop and End User Desktop.



Customers can view frequently asked questions if you add a link on the End User Desktop.

Creating a FAQ

If you have the appropriate permissions (assigned in the Configuration module), you can create and update frequently asked questions and topics via the Desktop or the Configuration module. To access the FAQ entry screen from the Desktop, select Create | FAQ on the action menu or click the New FAQ icon from a FAQ view.



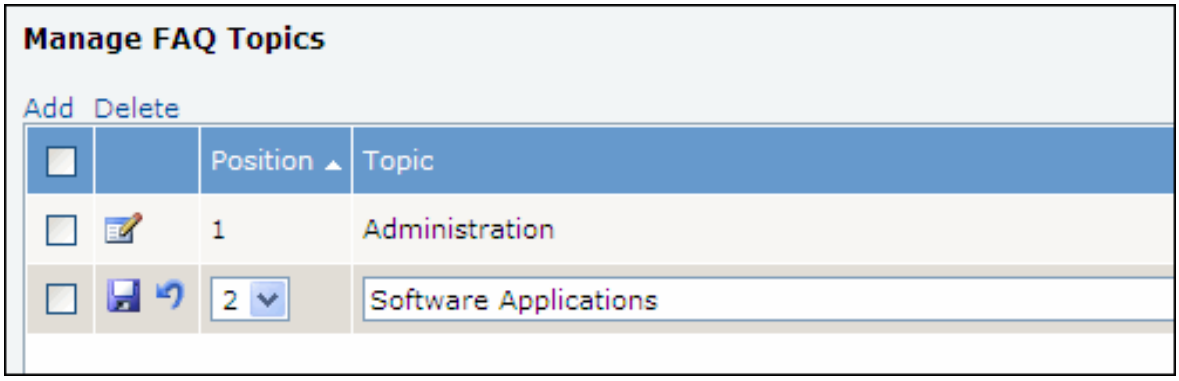
Field	Description
Topic	Select the topic under which the FAQ should be displayed on the Desktop and/or End User Desktop. If you select None, the FAQ will appear at the top of the FAQ topics. If you have appropriate permissions in configuration, you can click the Topic link to add a new heading by which to sort FAQs on the Desktop and End User Desktop.
Position	Select the row number for the position of the frequently asked question on the Desktop and/or End User Desktop. Row one will be listed first, row two will be located under the first row, etc.
Available To	Select one or both of the following: ■ Support Representatives to include the frequently asked question on Desktop. ■ End Users (Customers) to allow the frequently asked question to be used on the End User Desktop.

Field	Description
Question	Enter the frequently asked question. You can use HTML coding to format the text for display in the FAQ dialog from the Desktop.
Answer	Enter the answer to the frequently asked question. You can use HTML coding to format the text for display in the FAQ dialog from the Desktop.

To include a URL link in the question or answer, use the following format:
<A href="http://*domain*">http://*domain*/</A>
Example:
<A href="http://www.iSupport.com">http://www.iSupport.com/</A>

Creating/Updating Topics

To create a topic, click the Topic link in the FAQ entry screen. The Manage FAQ Topics dialog appears; click the Add link. After making an entry, use the Save icon to save it or the Cancel icon to undo your entry. Use the Edit icon to modify an entry. To delete a topic, select the topic and then click the Delete link.



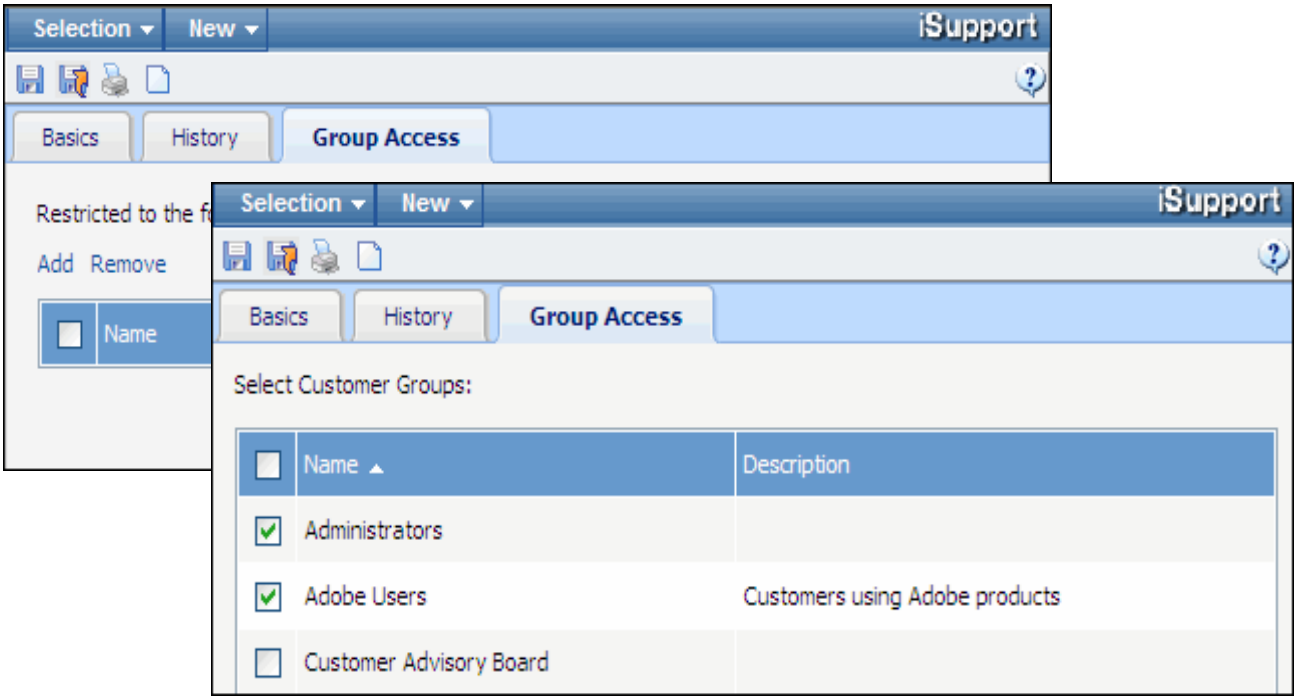
Field	Description
Topic	Enter the heading by which to sort FAQs on the Desktop and End User Desktop.
Position	Select the row number for the position of the topic on the End User Desktop. Row one will be listed first, row two will be located under the first row, and so on.

Viewing History

After you save or modify a frequently asked question, an entry appears on the History tab. This tab includes a notation of every action performed on the record with the date, time, and author stamp.

Restricting Access

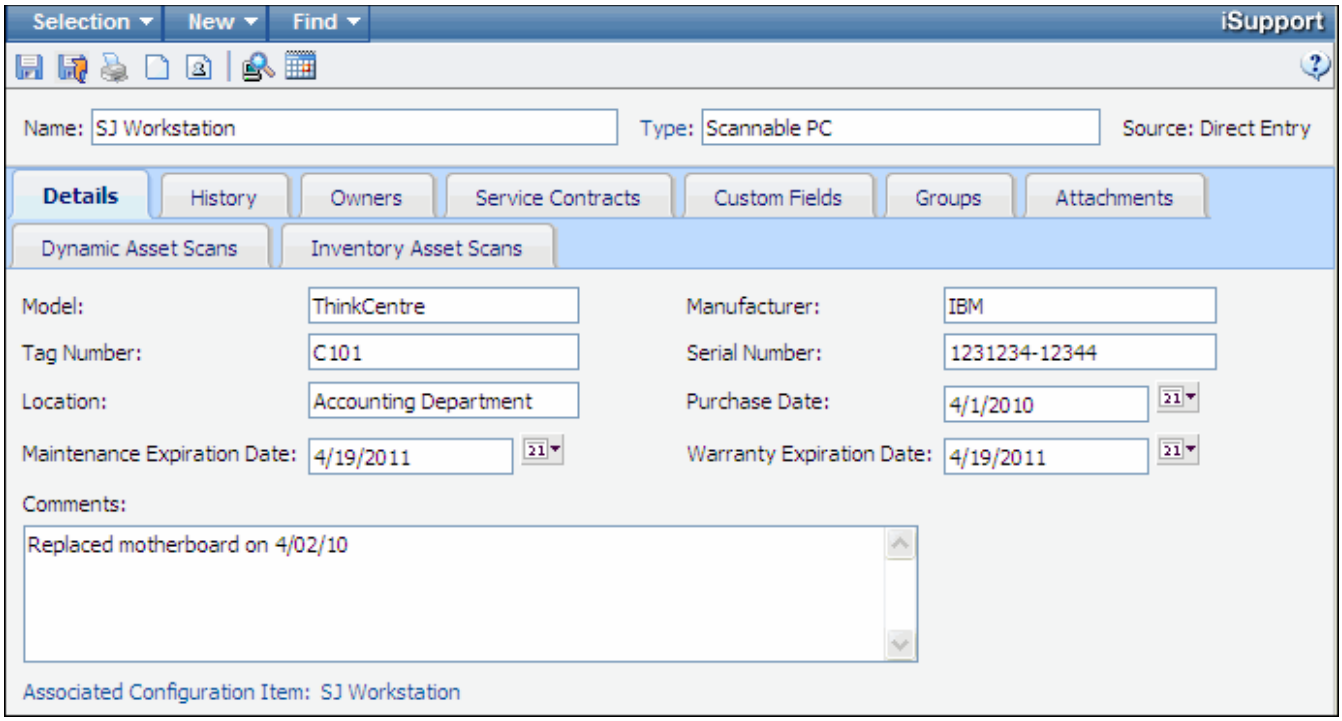
Use the Group Access tab to restrict display of a FAQ to members of customer groups. Click the Add link to display the following dialog for selecting the groups, and then click the Add button at the bottom of the screen. ***After you add one or more groups and save, the FAQ will display only to members of the selected groups.***



10 Working with Assets

Overview

Use the Asset screen to record information about any type of item. This information can be associated with a customer and pulled into an incident, problem, or change (if enabled). The Asset entry screen allows you to record identification numbers and purchase, warranty, and maintenance information if applicable.



Before you can enter an asset record, you'll need to select an asset type. Asset types enable you to track information on similar assets (for example, printers, laptops, furniture). Custom fields (specific to your company) and fields such as Owner, Tag Number, and Location are associated with asset types. These fields will appear when an asset type is selected in the Asset screen, and in the Incident screen when an asset with the asset type is selected. Purchasing functionality is associated with Asset functionality; Purchasing functionality can only be enabled if Asset functionality is enabled, and asset types are used when created Product records.

Asset groups enable you to associate assets for viewing and reporting. For example, you can create a group called Accounting Assets for assets such as computers and printers in the Accounting department.

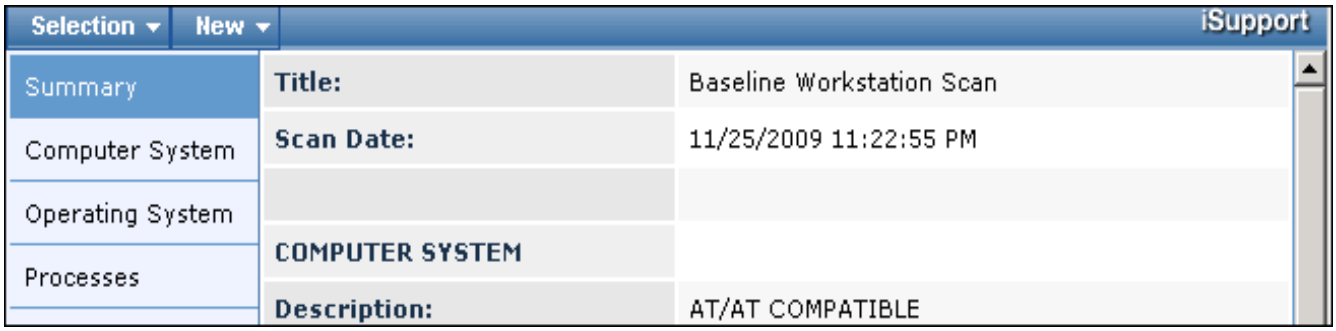
Asset Scans

Asset scans collect hardware, software, and service details automatically on a computer (Windows 98 and above or any other WMI-compliant machine; WMI must be installed and active) and on non-Windows devices on your local subnet. There are two types of scans in iSupport:

- You can perform a **dynamic asset scan** from the Incident or Asset screen or Desktop.
- **Inventory asset scans** can be scheduled and run automatically according to an Inventory Scan Definition, which defines the hosts (remote machines) to be scanned during a specified start time and duration. Inventory scans include a more comprehensive set of data than dynamic scans.

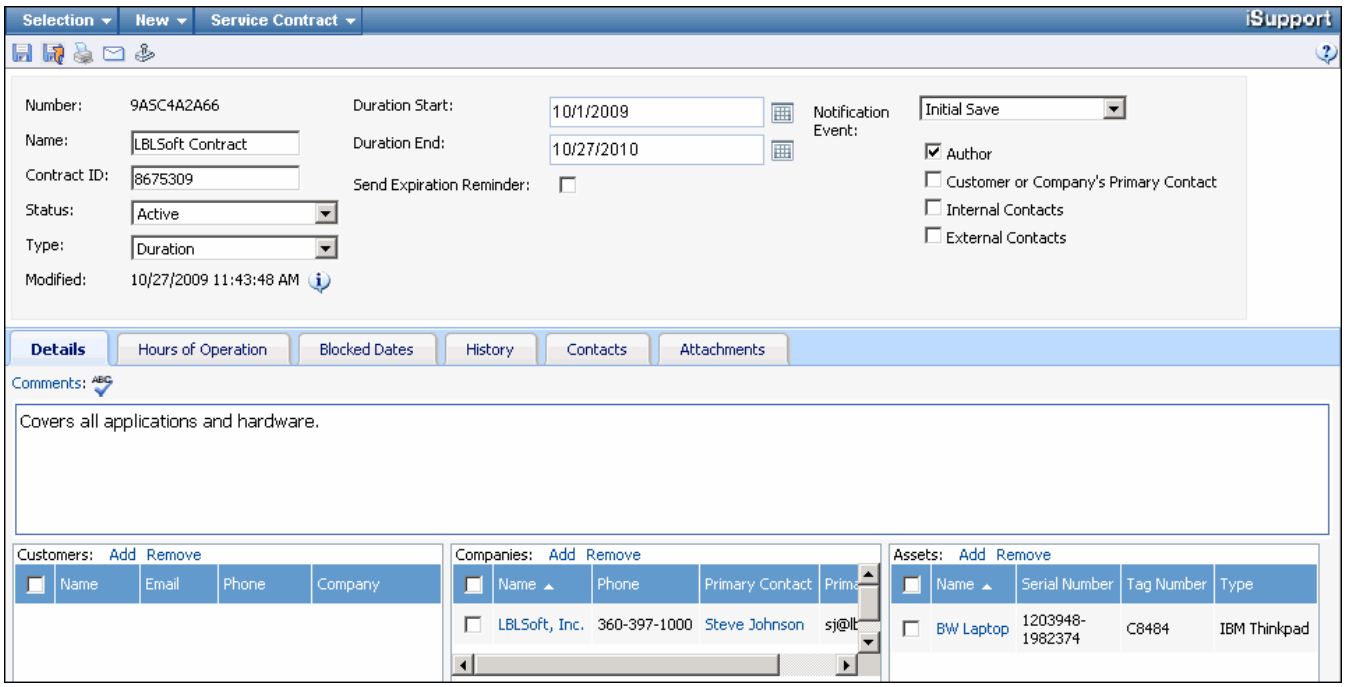
To perform the scan, you will need to enter the IP address or NetBIOS name of the machine to be scanned. The login used for accessing the machine will be validated by the WMI process of the target machine in order to return the requested data. Traditionally, the login must be a member of the Administrators group of the machine to be scanned, but machine permissions may be modified to a different structure. A default login may be set up during iSupport configuration and accessed automatically by iSupport.

When a dynamic scan is initiated, the support representative can specify the types of data to include in the scan.



Service Contracts

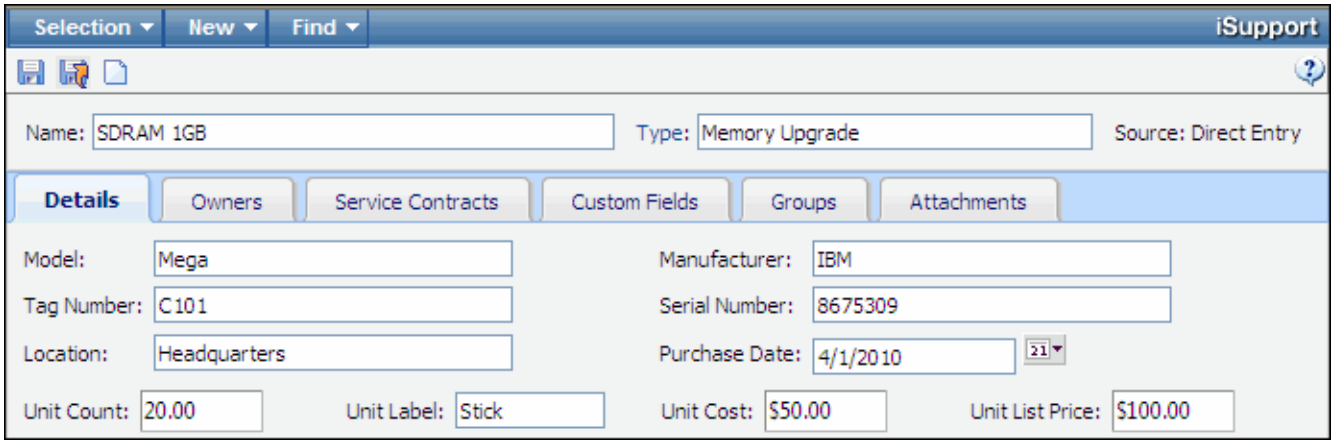
If Service Contract functionality is enabled in configuration, you can use Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe).



The *iSupport Administrator's Guide* contains information on setting up asset functionality.

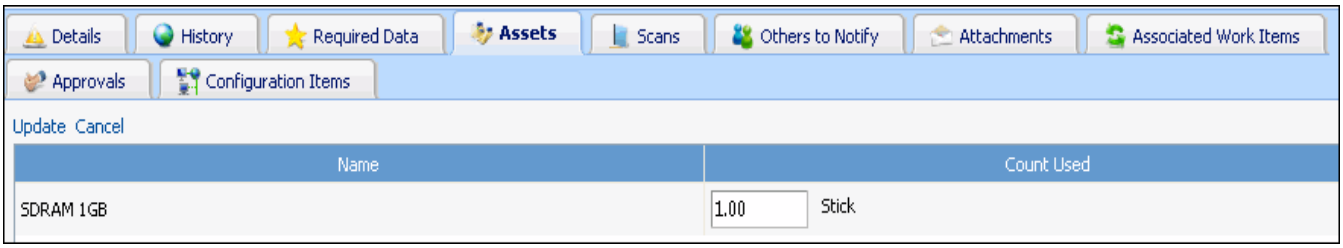
Count Tracking

Count tracking can be enabled for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit List Price fields to appear in the Asset screen if the type is selected.

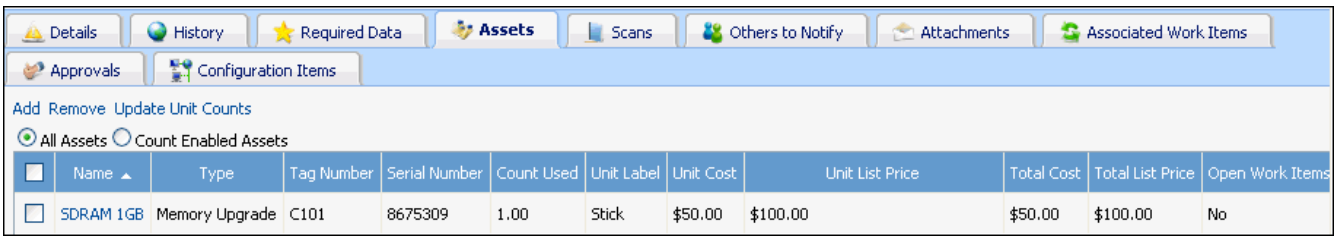


When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can click the Update Unit Counts link, enter the number of units used, and decrement the unit count.

Entering count used



After decrementing count



A notification can be configured to be sent when a specified count is reached. If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Associated Configuration Items

If you have the Service Desk edition, Configuration Management Database (CMDB) functionality enables you to display, report on, and send correspondence regarding the assets, services, and other resources that are crucial to your organization's operation and the relationships between those items. A CMDB contains configuration items (CIs) for the resources to be tracked and the

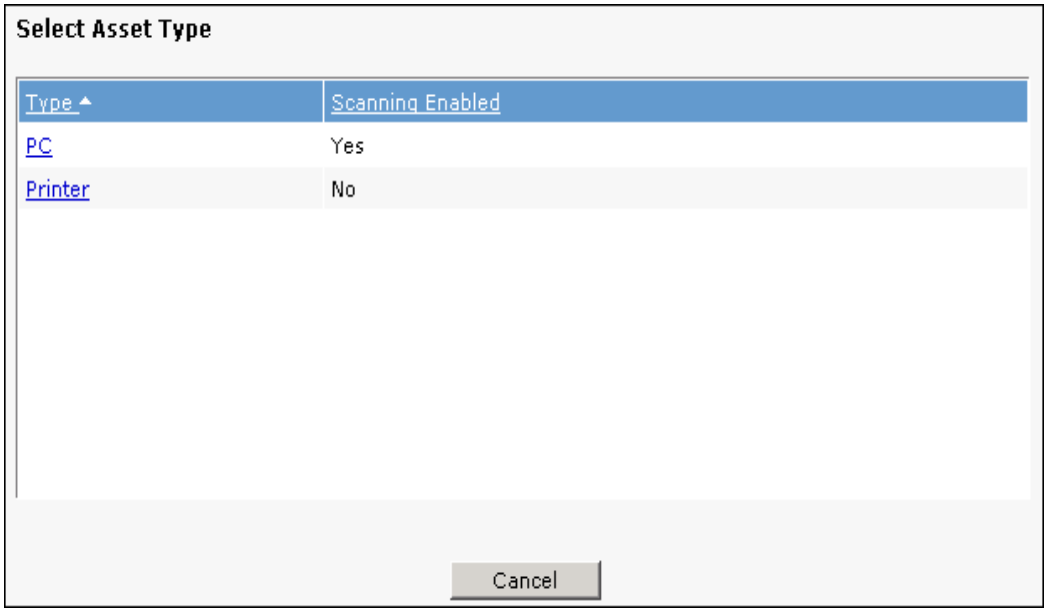
relationships between those items. You can associate a predefined configuration item with an asset, and utilize the data on the associated asset for views, reports, and correspondence. For example, you can send a correspondence with information from the associated asset from the Configuration Item screen.

The associated asset feature is enabled for a CMDB type in the CMDB Type Configuration screen, and the association is performed in Asset or Configuration Item screen. See "Working with Configuration Items" on page 403 for more information on CMDB functionality.

Entering an Asset Record

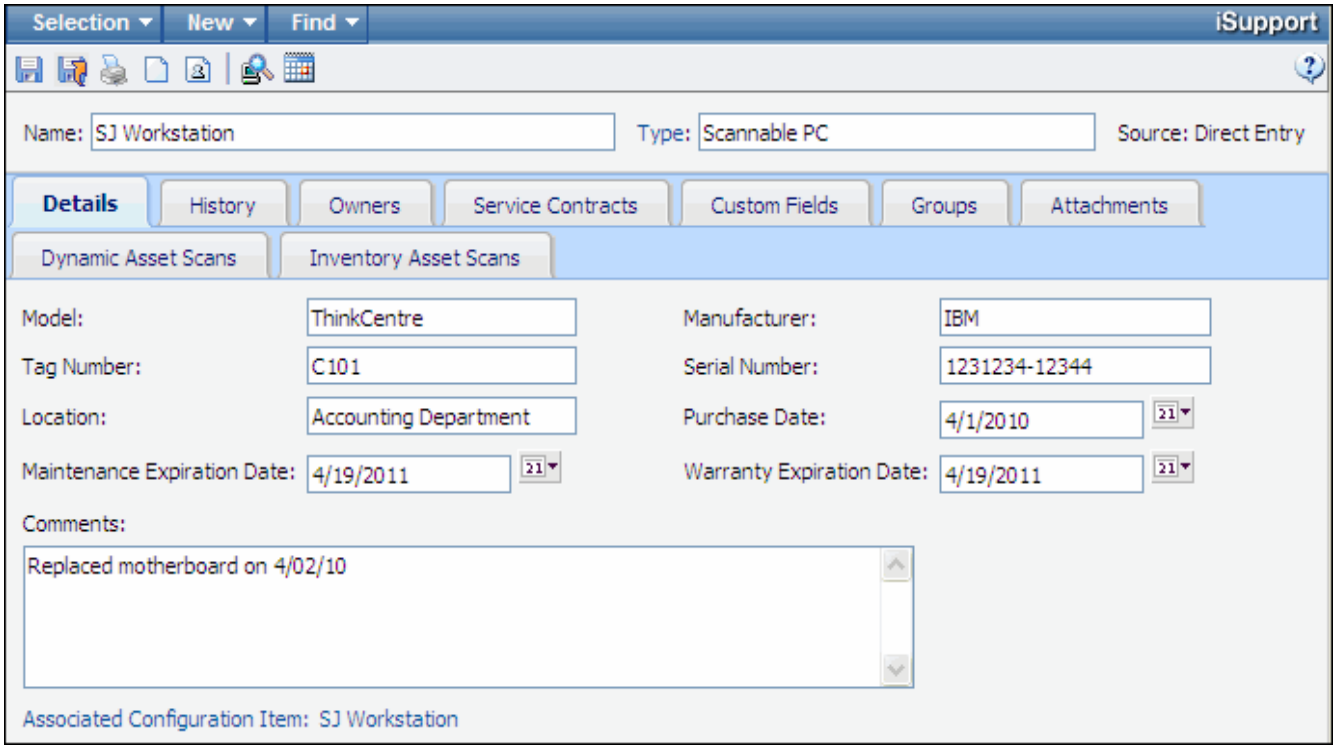
Use the Asset entry screen to create Asset records for a specific item with purchase and identification information.

To access the Asset entry screen, select Create | Asset on the Desktop action menu. The following dialog appears; select the applicable asset type.



Entering Asset Details

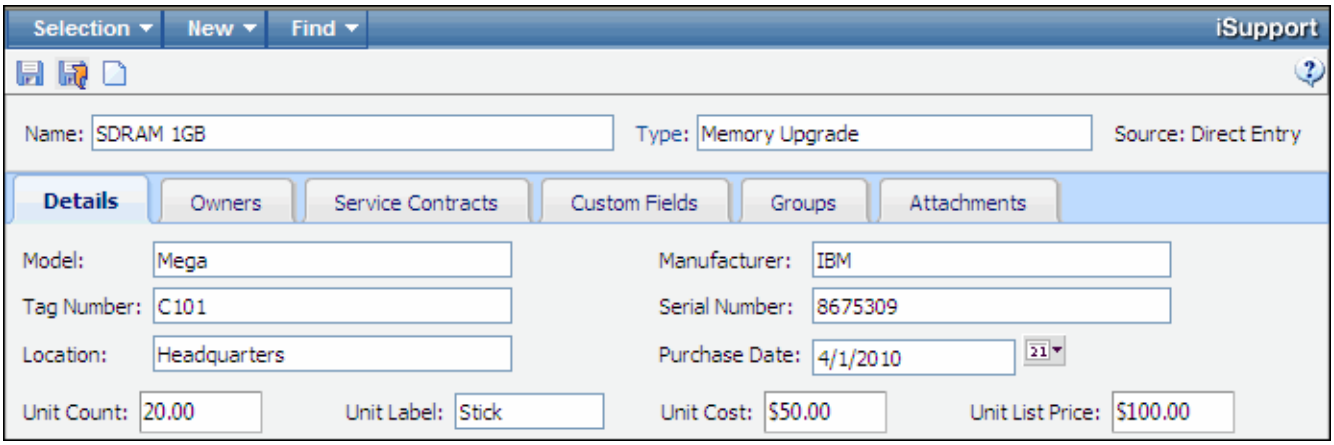
Use the fields on the Details tab to enter general information about the asset. The fields that appear depend on the configuration of the selected asset type.



Field	Description
Name	Enter the name of the asset. When the asset is selected in the Incident, Problem, Change, or Purchase Request screen, the entry in this field will be included on the Asset tab.
Type	The selected asset type appears; click this link to change it. When the asset is selected in the Incident, Problem, Purchase Request, or Change screen, the entry in this field will be included on the Asset tab.
Tag Number Serial Number Location Model Purchase Date Manufacturer Comments	One or more of these fields may appear depending on the selected asset type. These fields (except Comments) will appear when the asset is selected in the Incident, Problem, Purchase Request, and Change screens.
Maintenance Expiration Date	This field will appear if maintenance tracking is enabled for the specified asset type. Enter the date on which the maintenance contract ends. Expiration notifications may be configured to be sent before this date.

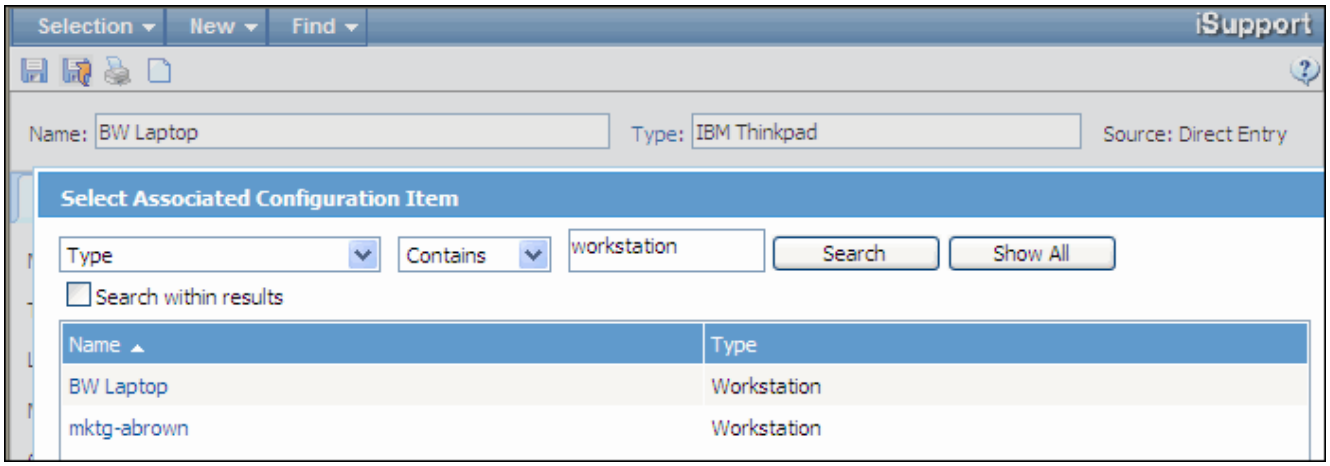
Field	Description
Warranty Expiration Date	This field will appear if warranty tracking is enabled for the specified asset type. Enter the date on which the warranty ends. Expiration notifications may be configured to be sent before this date.

If enabled for the selected asset type, the **Unit Count, Unit Label, Unit Cost,** and **Unit List Price** fields will appear in the Asset screen as shown below if the type is selected.



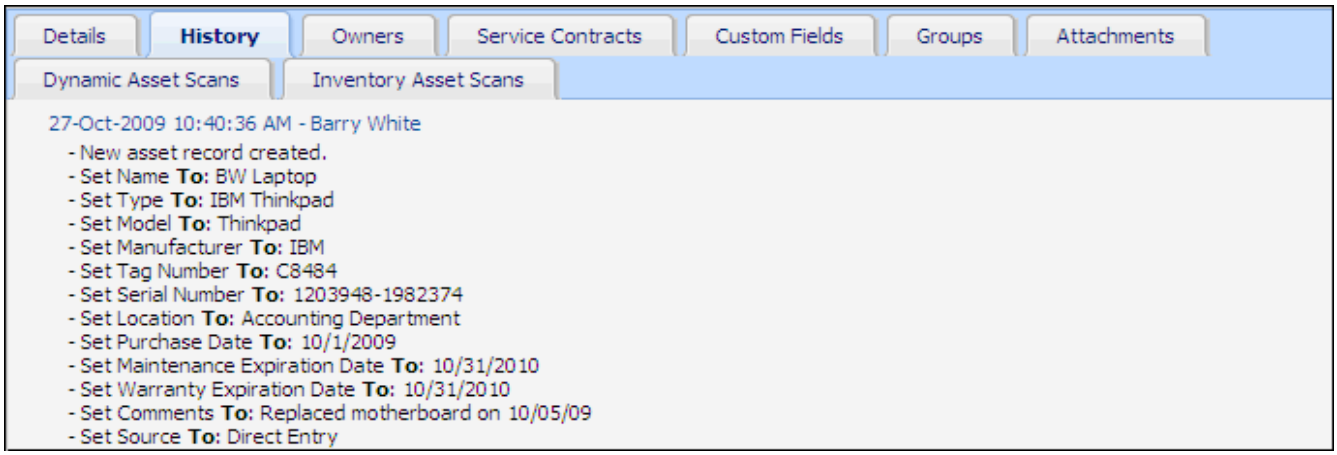
Unit Count	Enter the total number of units to be tracked for the asset. When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can enter the number of units used and decrement the unit count. A notification can be configured to be sent when a specified count is reached. If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.
Unit Label	Enter a name describing one unit.
Unit Cost	Enter the cost for one unit.
Unit List Price	Enter the price for one unit.
Associated Configuration Item	If applicable, click this link to select a configuration item to associate with the asset. If assets are configured to be an associated item for a configuration item type, the configuration items of that type will appear in the Select Associated Configuration Item dialog. You can include information on associated configuration items in views, reports, and correspondence.

Field	Description



Viewing Audit History

After you save an asset record, an entry appears on the History tab. This tab includes a notation of every action performed on the asset record with the date, time, and author stamp.



Selecting Owners

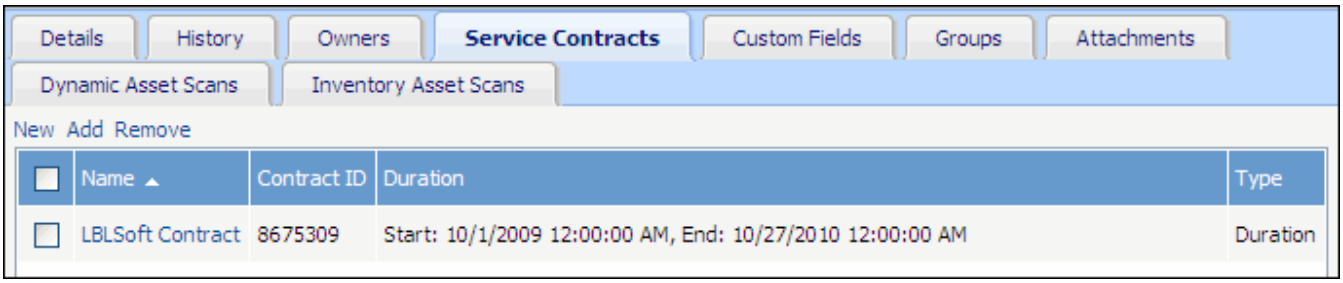
If the Owners tab is configured to display for the asset type, click the Add link to assign one or more owners to the asset. You can also click the Company link to associate a company with the asset; this enables targeted customer and asset lookups when you create an incident while viewing a saved Asset, Customer Profile, or Company record. (Note that only one company can be

associated with an asset.) A prompt will appear for adding the company's customers added to the Owners field.

Associating Service Contracts

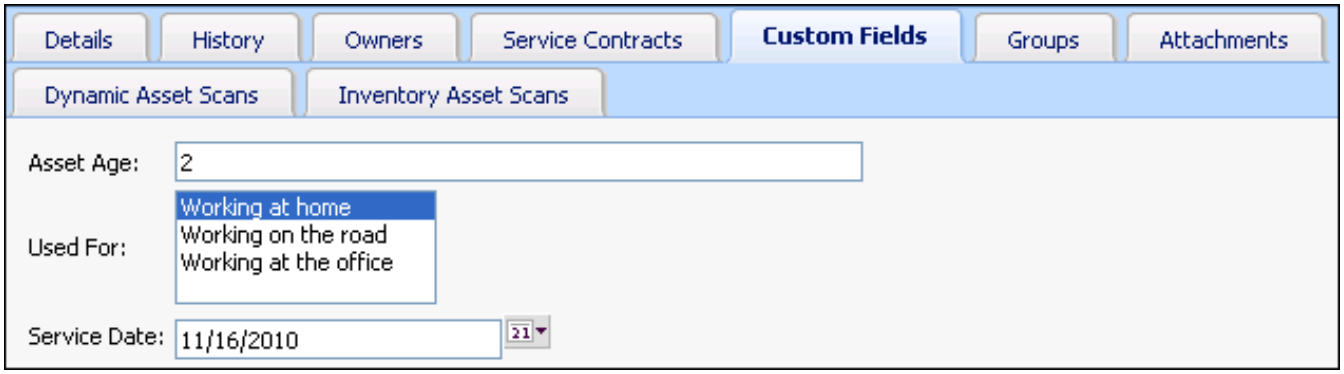
This tab appears if Service Contract functionality is enabled in configuration. Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe).

On the Service Contracts tab, click the New link to create a new service contract and assign it to the asset, click the Add link to assign the existing contract to the asset, or click the Remove link to remove the assignment.



Completing Custom Fields

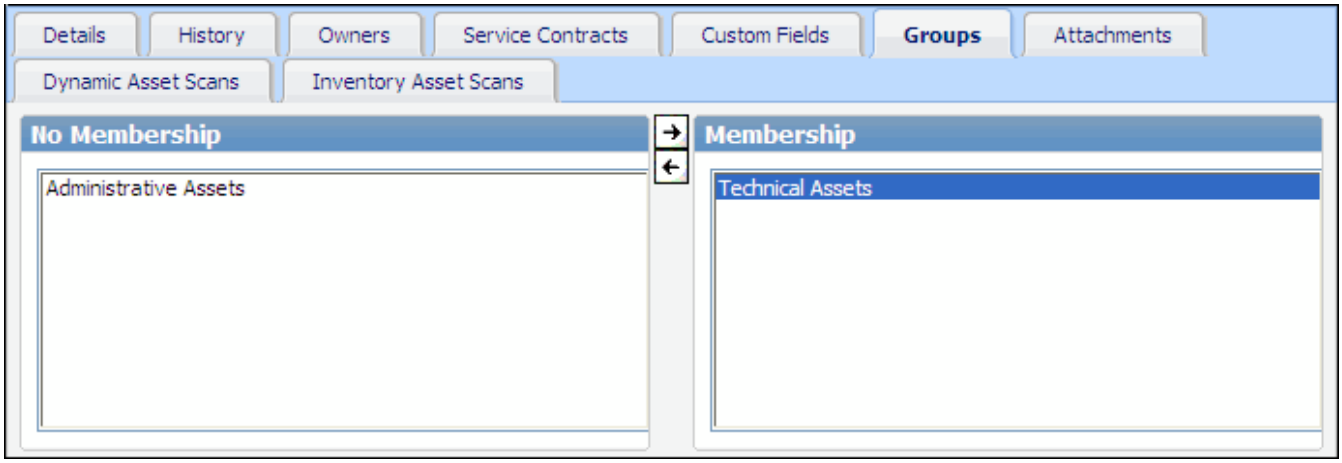
If custom fields have been set up for the specified asset type and/or for the Asset screen, the fields will appear on the Custom Fields tab. You may be required to enter information in these fields.



Assigning to Asset Groups

Asset groups enable you to associate assets for viewing and reporting. If you have Asset | Editor | Edit permission, you can add an asset to a group or remove an asset from a group. This can also be accomplished for selected assets on the Desktop.

An asset group may be configured with group access restrictions; this allows only those in the related support representative group to edit Asset records in the asset group (or any other asset record not included in an asset group). If configured, a support representative can select only his/her groups to add to an asset. Other unrelated groups could be present on an existing asset; these unrelated groups could be removed but not added.



Field	Description
No Membership Membership	The No Membership field includes asset groups set up in the Configuration module. ■ To assign the asset to a group, select the group in the No Membership field and click the → icon. ■ To remove the asset from a group, select the group in the Membership field and click the ← icon.

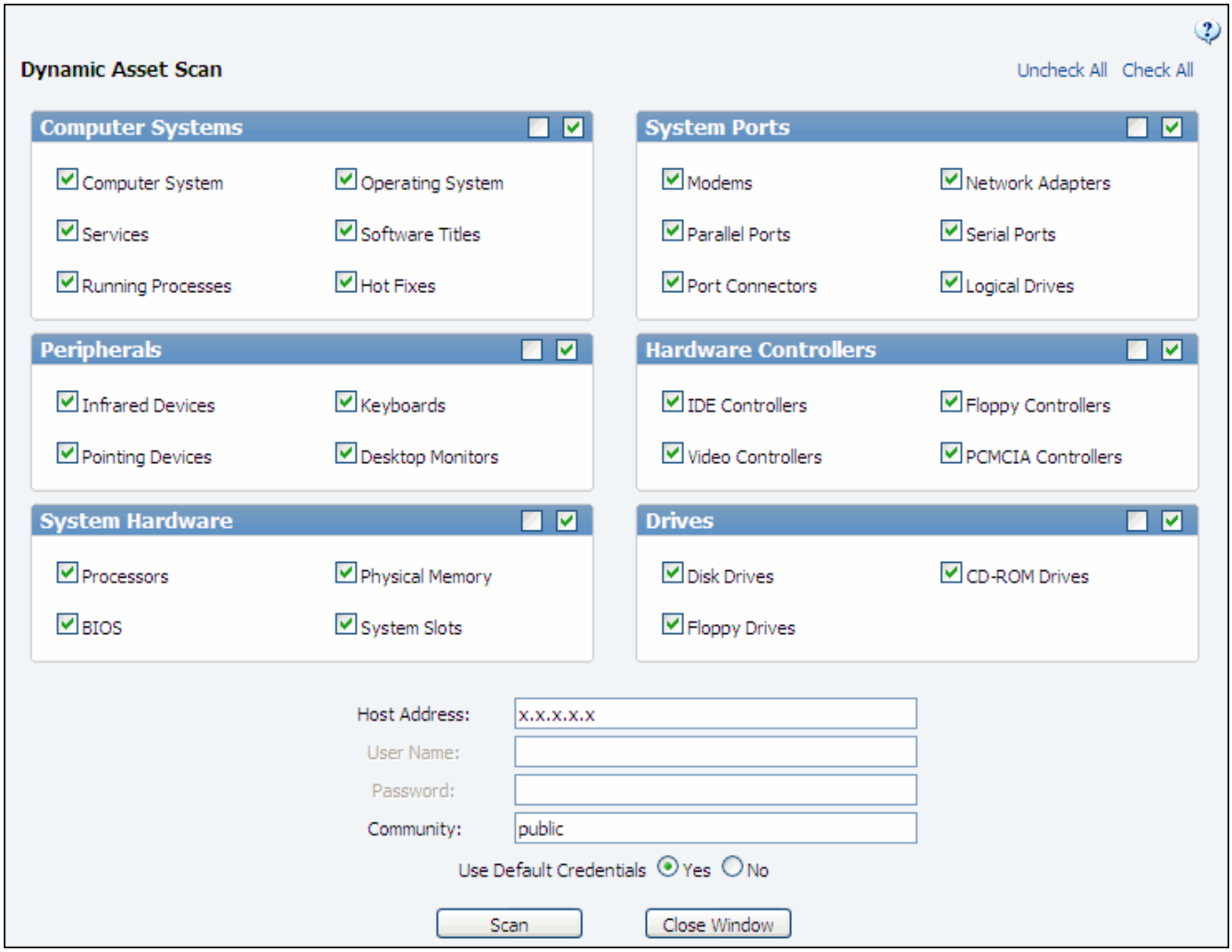
Attaching Files

To attach a file to the asset record, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.

Performing a Dynamic Scan

From the Asset entry screen, you can scan non-Windows devices on your local subnet and computers with Windows 98 and above or any other WMI (Windows Management Instrumentation)-compliant machine over the network. This allows you to collect hardware, software, and service details automatically. The login used to run the scan must be in the Administrators group on the machine to be scanned. If you do not have this login, it can be set during iSupport configuration and accessed automatically by iSupport.

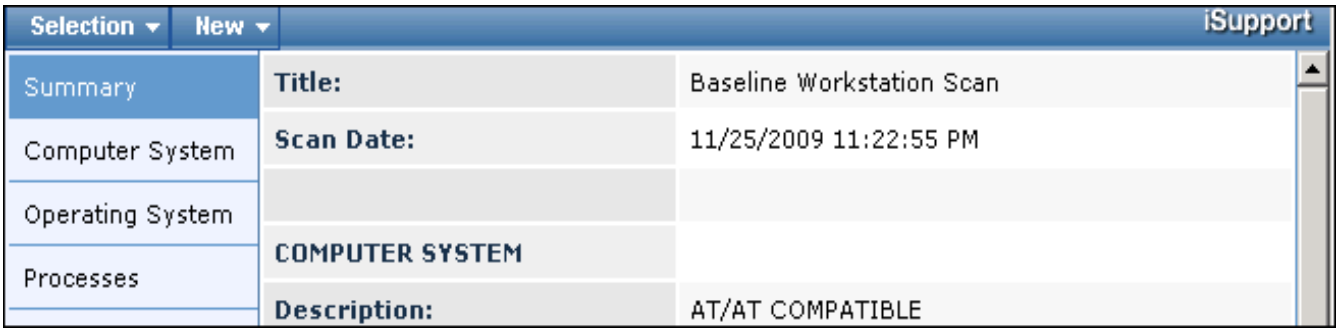
Dynamic asset scans can be performed from the Desktop, Incident screen, or Asset screen. To perform a scan in the Asset or Incident screen, you can select New | Scan, click the New Scan icon, or click the New Scan link. From the Desktop, click Dynamic Asset Scan on the Create menu. The Dynamic Asset Scan dialog appears:



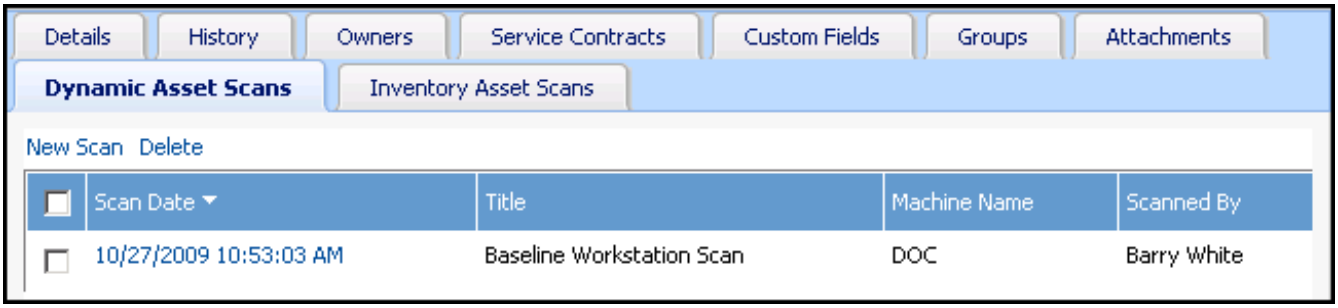
Field	Description
Computer Systems System Ports Peripherals Hardware Controllers System Hardware Drives	Select the types of data to include in the scan. To select all checkboxes in a section, use the icon; to clear the checkboxes in a section, use the icon. Use the Uncheck All and Check All links for all checkboxes.
Host Address	Enter the identifier of the system to be scanned (IP address, machine name to scan in the current domain, or domain\machine name).
User Name Password	These fields will be enabled if: ■ A default user name and password have **not** been entered for the selected asset type during configuration. ■ No is selected in the Use Default Credentials field. Enter a user name and password with rights for accessing the machine to be scanned.
Community	If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device). Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".
Use Default Credentials	If the user name and password with administrative rights was set up for the asset type during configuration, select Yes to use that login (instead of completing the User Name and Password fields in this dialog) to perform the scan. Select No to enable the User Name and Password fields and enter the login for accessing the machine to be scanned.

When finished, click the Scan button.

After the scan has finished, the Scan Results dialog appears as shown in the example below. Use the links on the left to quickly move to a certain portion of the scan. Choose Save on the Selection menu to save the scan and enter a title.



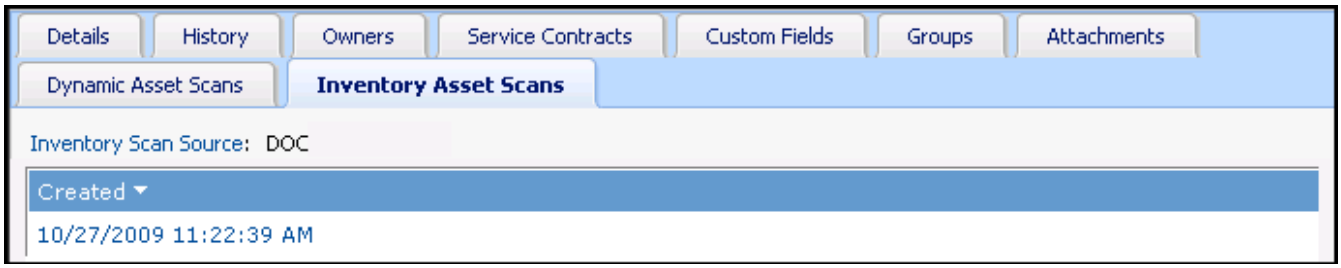
Choose Attach to Asset on the scan's Selection menu to attach the scan to the current Asset record. The scan appears in the Dynamic Scans section in the Asset screen as shown in the example below. You can click on the date/time link to view the scan. To detach the scan from the asset record, click on the date/time link to open the scan and choose Detach From Asset on the scan's Selection menu.



Associating Inventory Scans

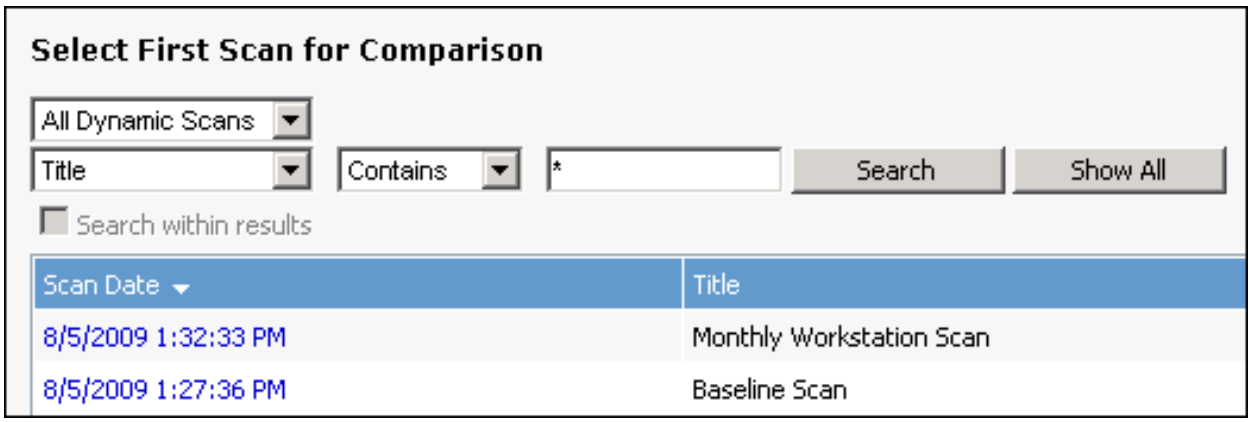
Asset scans can be scheduled and run automatically according to an Inventory Scan Definition set up during configuration. The Inventory Scan Definition defines the system(s) to be scanned during a specified start time and duration.

To select an existing inventory scan to be associated with the asset record, click the Inventory Scan Source link on the Inventory Scans tab. The Select Inventory Scan Source dialog appears with a list of all of the systems on which an inventory scan has been performed. The inventory scans that have run against the selected machine (up to 15 of the most recent scans) will appear on the Inventory Scans tab as shown in the example below. You can click on the date/time link to view a scan.

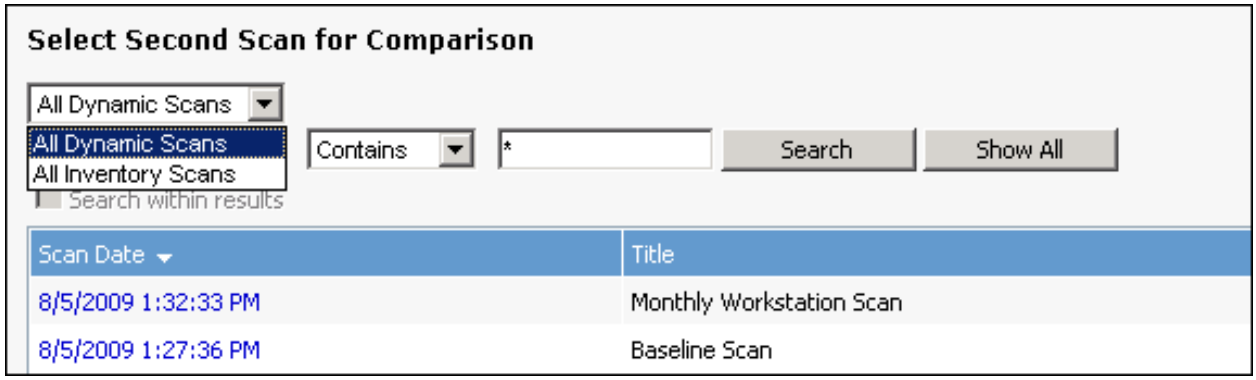


Comparing Asset Scans

If you have sufficient permissions, you can select two scans (dynamic or inventory) and then generate and save a side-by-side comparison. From the Desktop, select Create | Asset Scan Comparison. From a scan, select New | Scan Comparison. The following dialog appears; use the drop-down list to display either all dynamic scans or all inventory scans for the first scan in the comparison. You can use the search dropdown fields for finding the scans to compare.



The following dialog appears; use the drop-down list to display either all dynamic scans or all inventory scans for the second scan in the comparison.



The scan comparison appears. Choose Save on the Selection menu to enter a title and save the scan comparison.

Selection | New Comparison

Summary	**Scan Comparison Title:**	**Untitled**	
Computer System	**Date Created:**	3/25/2008 12:29:38 PM	
Operating System			
Processes	**Scan Title:**	**Initial Setup Scan**	**Second Scan**
Services	**Scan Date:**	1/23/2008 2:16:49 PM	1/23/2008 2:27:12 PM
Logical Drives			
Software Titles	**COMPUTER SYSTEM**		
Hot Fixes	**Domain:**	QA.com	QA.com
Network Adapters	**Domain Role:**	Member Workstation	Member Server
Parallel Ports	**Name:**		
Serial Ports	**Model:**	8307313	830731U
	Processors:	2	1

Saving an Asset Record

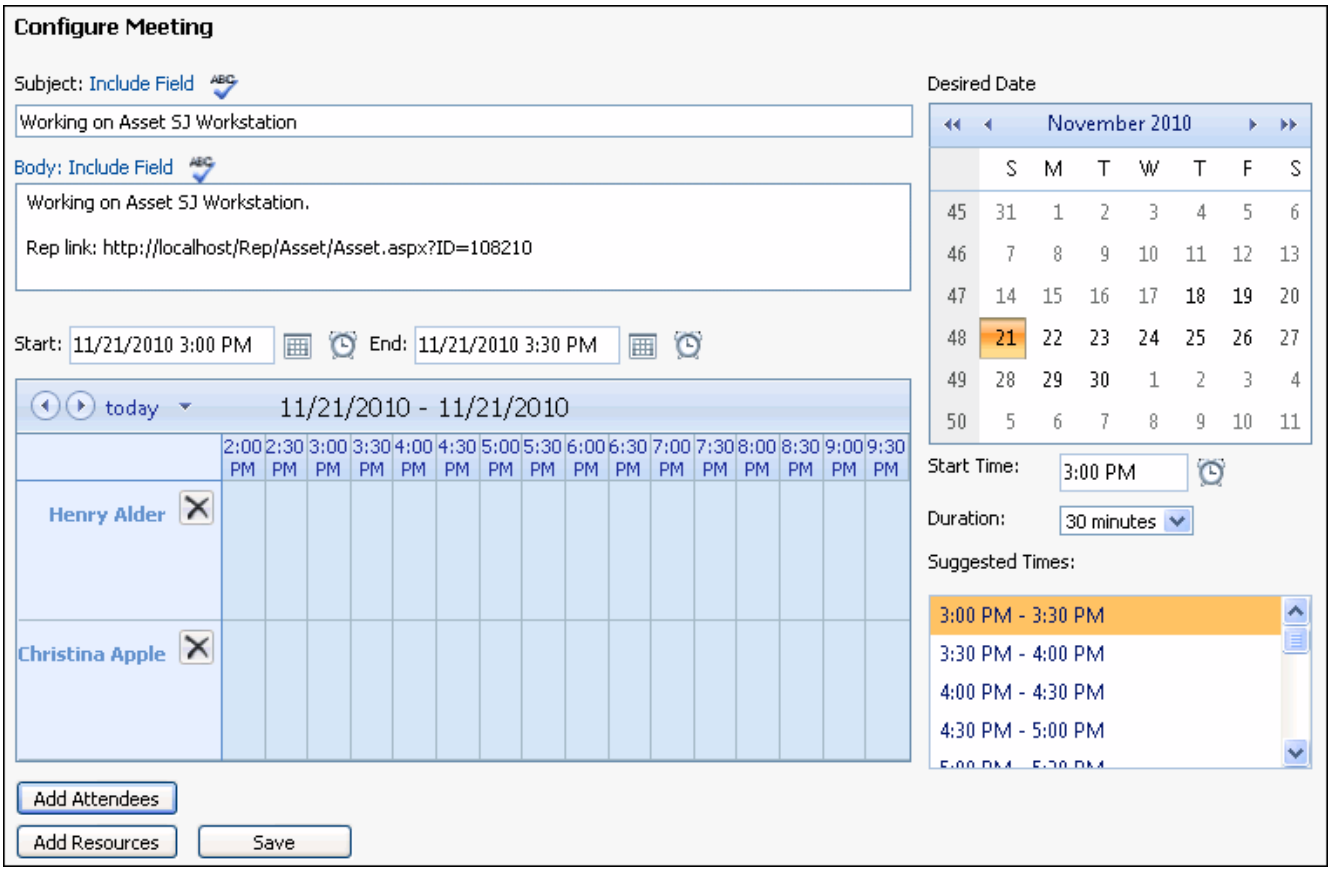
To save an asset record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save or Save and Close Window icon.

Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Asset screen after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules of meeting

attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Asset *<asset number>*" will be included by default in the meeting entry along with a link to the record via the Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees.

After saving, the View Meetings link will appear in the Asset screen for displaying meeting details.

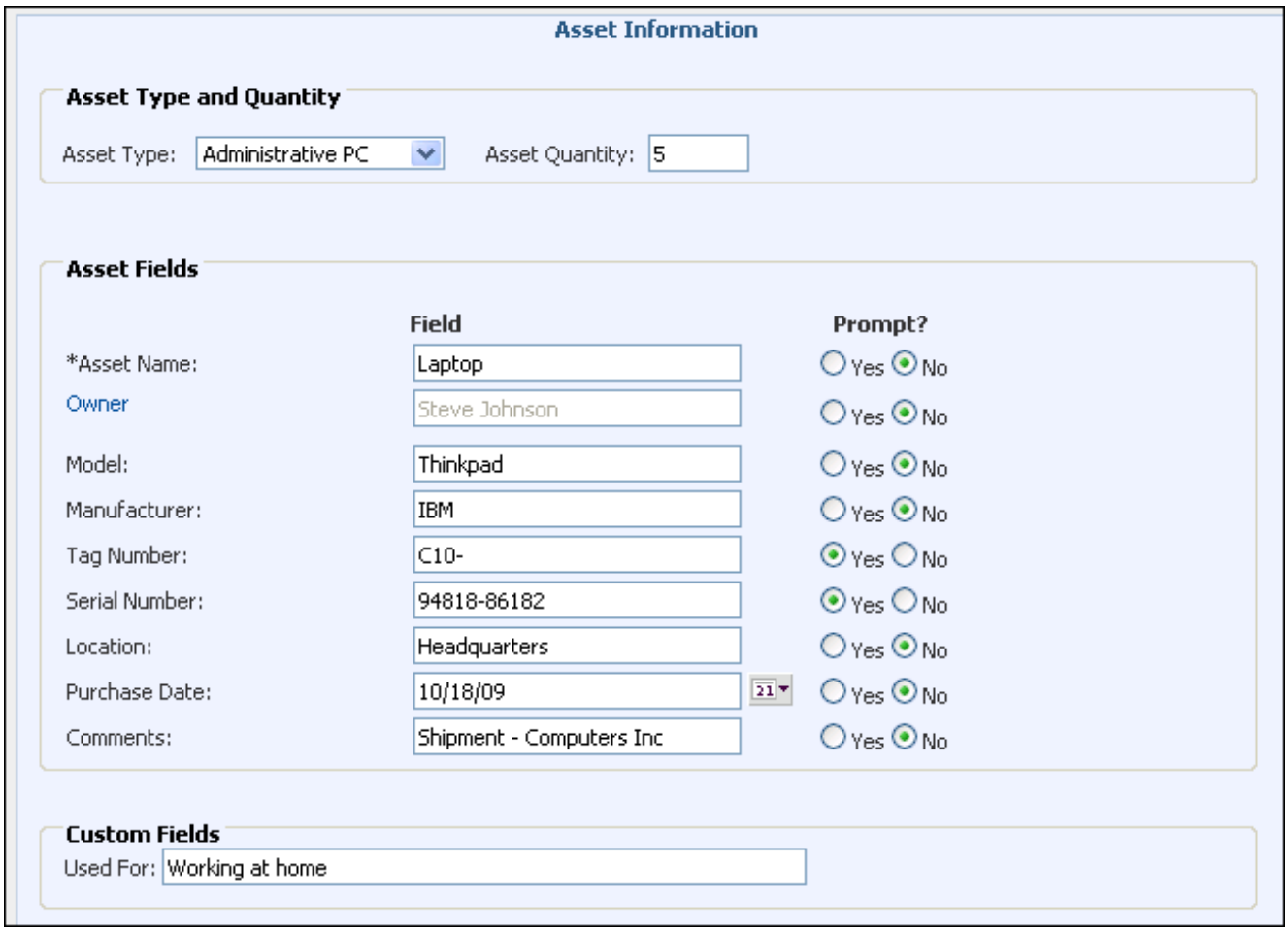
Creating New Records

Click the icon or select New | Asset to create a new Asset record.

Using the Multiple Asset Creation Wizard

The Asset Creation Wizard enables you to automatically create more than one asset record. You can enter data to populate asset fields in all records created and display prompts for entering data unique to a record. You can save your settings in a profile for use later.

The Asset Wizard option appears on the Create menu on the Desktop if the Use Multiple Asset Wizard permission has been assigned to you in your Support Representative Profile record. Select New in the first screen to start the process.

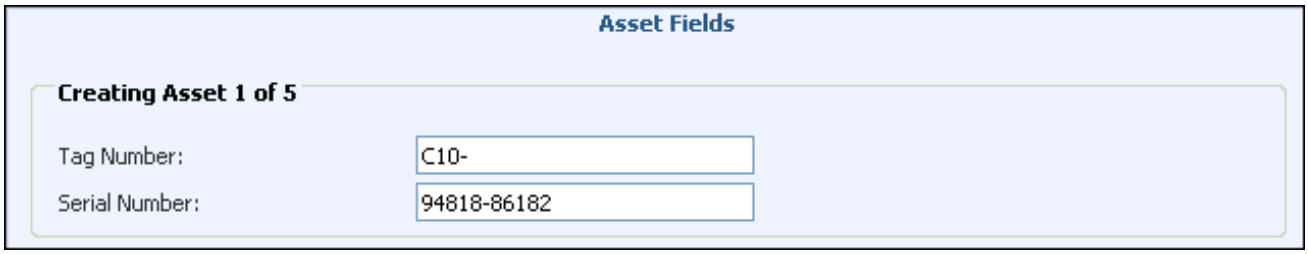


Enter the asset type, quantity, and data to populate asset fields in all records created. Select Yes in the Prompt column to display prompts for entering data unique to a record. Click Next when finished.

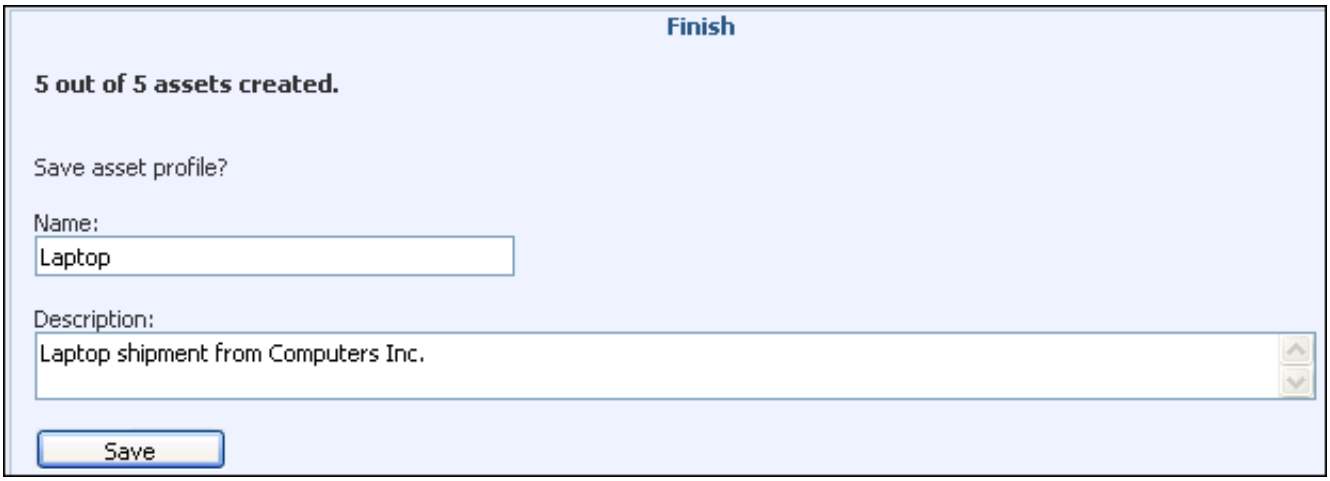
Field	Description
Asset Type	Select the asset type to assign to all of the Asset records created. Asset types are set in the Configuration module.
Asset Quantity	Enter the number of Asset records to be created.
Field column	Enter the data to populate the corresponding fields in all of the Asset records created. With the exception of the required fields (marked with an asterisk), you can leave a field blank to leave the corresponding field blank. The Asset Name field is required.

Field	Description
Prompt column	Select Yes to display the field on a screen for each record created so you can enter a value unique to each record.
Custom Fields	Enter the data to populate the corresponding custom fields on all records created. Custom fields are set in the Configuration module.

If you selected Yes for a field in the Prompt column, a screen appears for each record to be created. Enter the data unique to each record and click Next.



After the Asset records have been created, you can enter a name and description and save the profile. Click Finish to exit without saving.



Printing an Asset Record

To print an asset record, select Print from the Selection menu or click the icon. You can also print from the Desktop.

Deleting an Asset Record

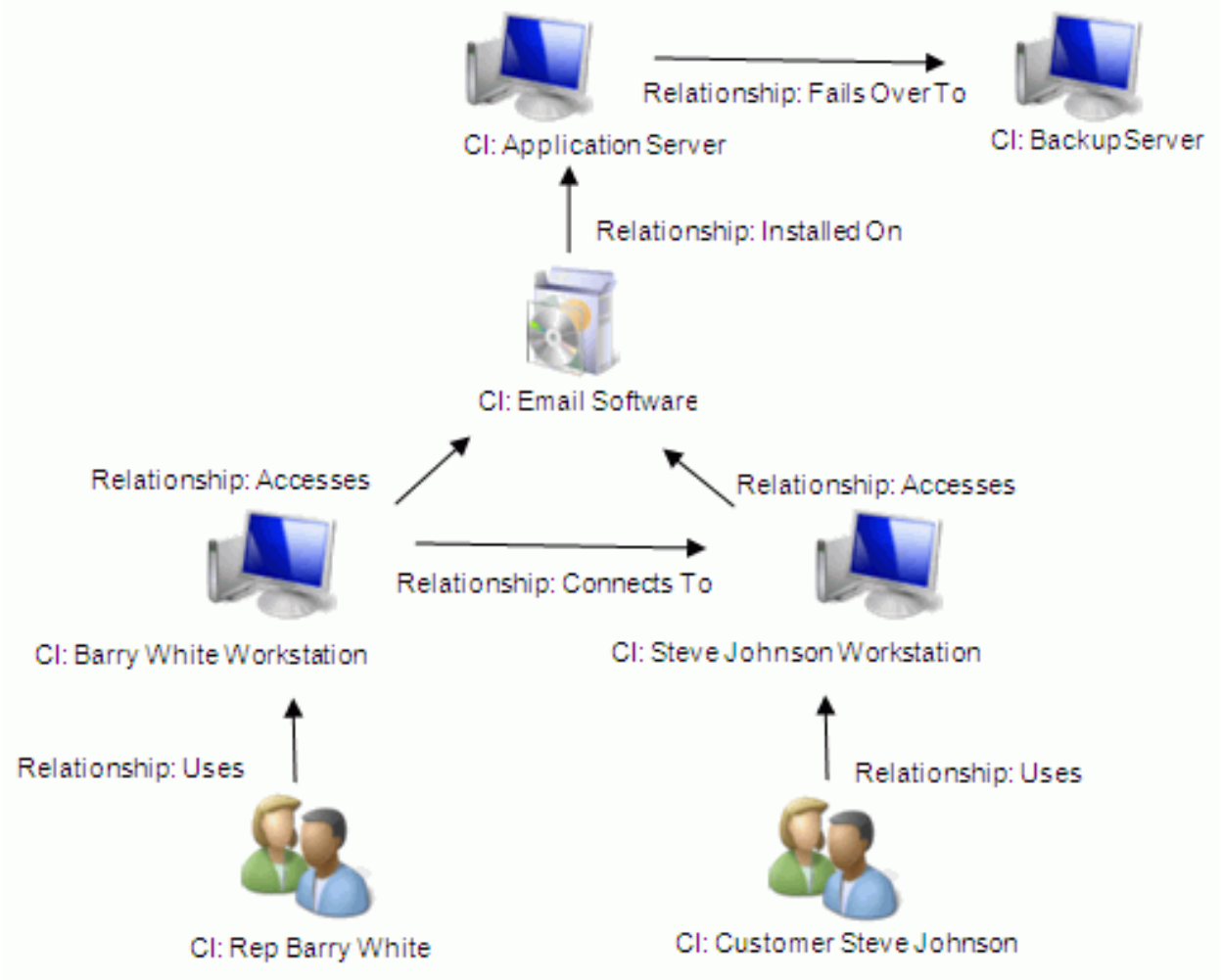
To delete an asset record, select Delete from the Selection menu. You can delete multiple asset records via the Desktop.

11 Working with Configuration Items

Overview

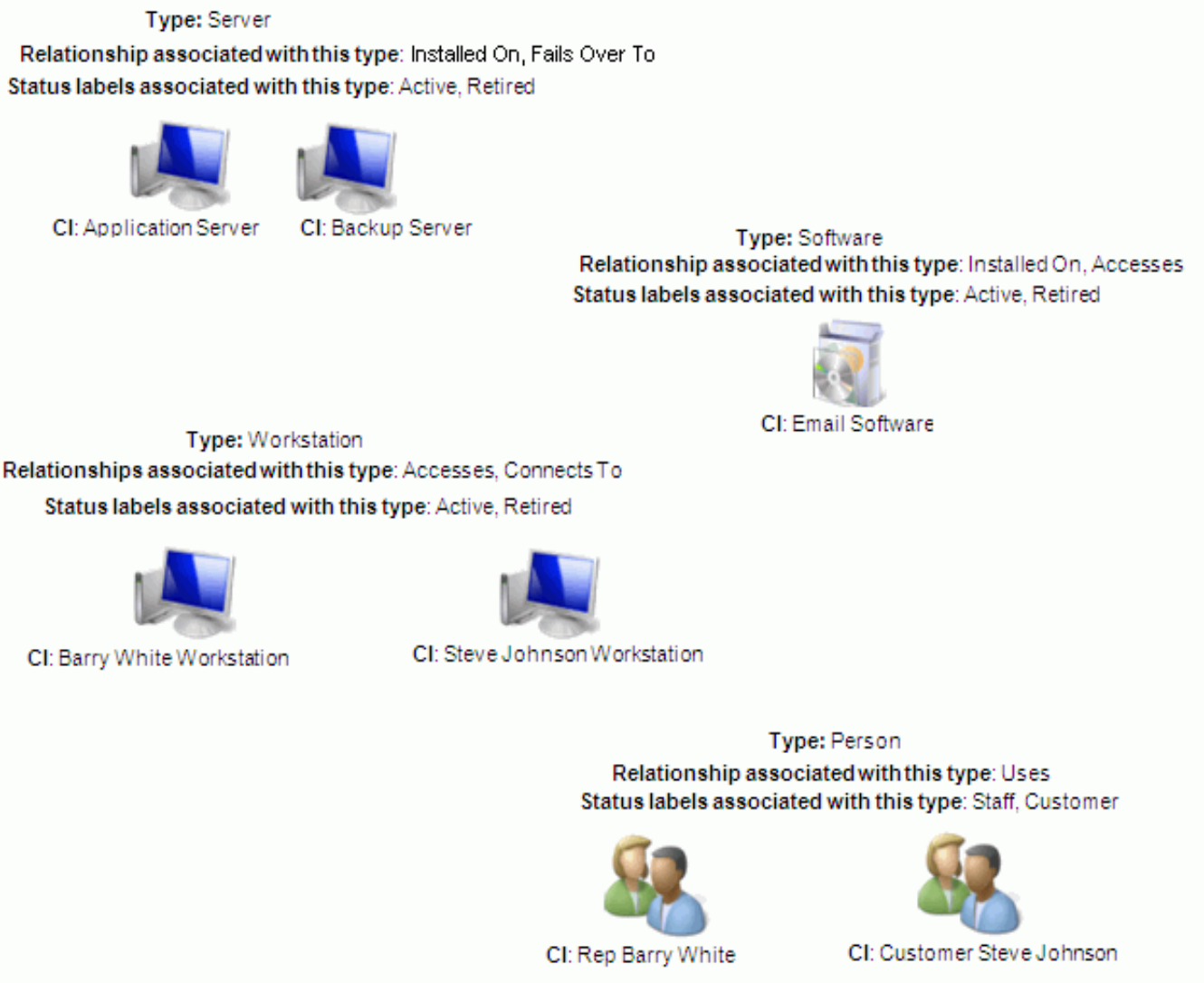
If you have the Service Desk Edition, use Configuration Management Database (CMDB) functionality to track the assets, services, and other resources that are crucial to your organization's operation and the relationships between these components. These items and their relationships are graphically displayed so you can immediately answer questions about events - planned or unplanned - that may impact several aspects of your company's IT operations.

To create a CMDB, you'll create configuration items (CIs) for the resources you want to track and designate the relationships between CIs.



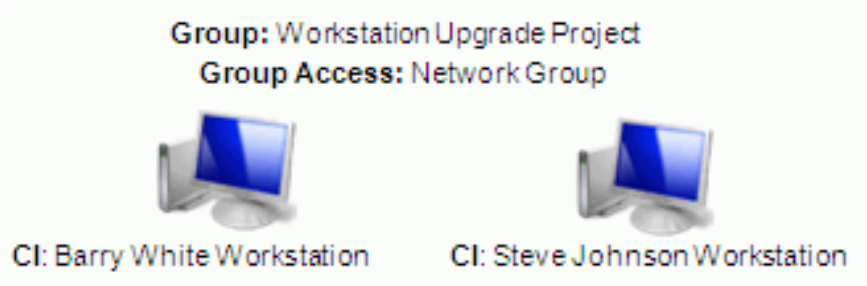
Configuration item types classify similar configuration items. When configuration item types are set up, the optional and custom fields, notifications, relationships available, and maintenance/ warranty information are defined for the Configuration Item entry screen. Configuration item types are defined in the Configuration module.

You'll assign custom status labels such as Active, Retired, Staff, Customer, etc. to designate the status of a configuration item. These labels are defined in the Configuration module.



Configuration item groups are used to associate a collection of items for views and reports. iSupport's Group Access functionality can be used to restrict access and display of a configuration

item to members of a support representative group. Groups are defined in the Configuration module.



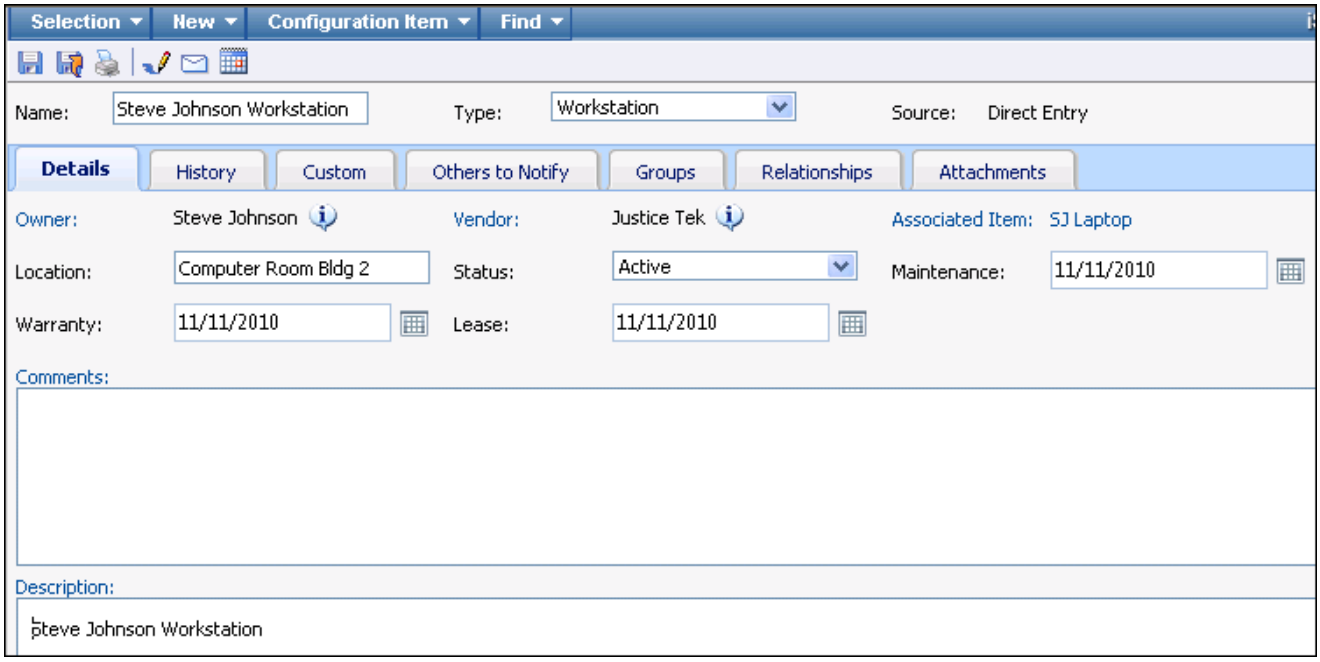
The *iSupport Administrator's Guide* contains information on setting up CMDB functionality.

Entering a Configuration Item Record

Use the Configuration Item entry screen to create Configuration Item records and enter custom information, associate groups, and designate relationships to other configuration items. To access the Configuration Item entry screen, use the Configuration Item option on the Desktop action menu.

Entering Configuration Item Details

The fields that appear on the Details tab will depend on the configuration of the selected configuration type.

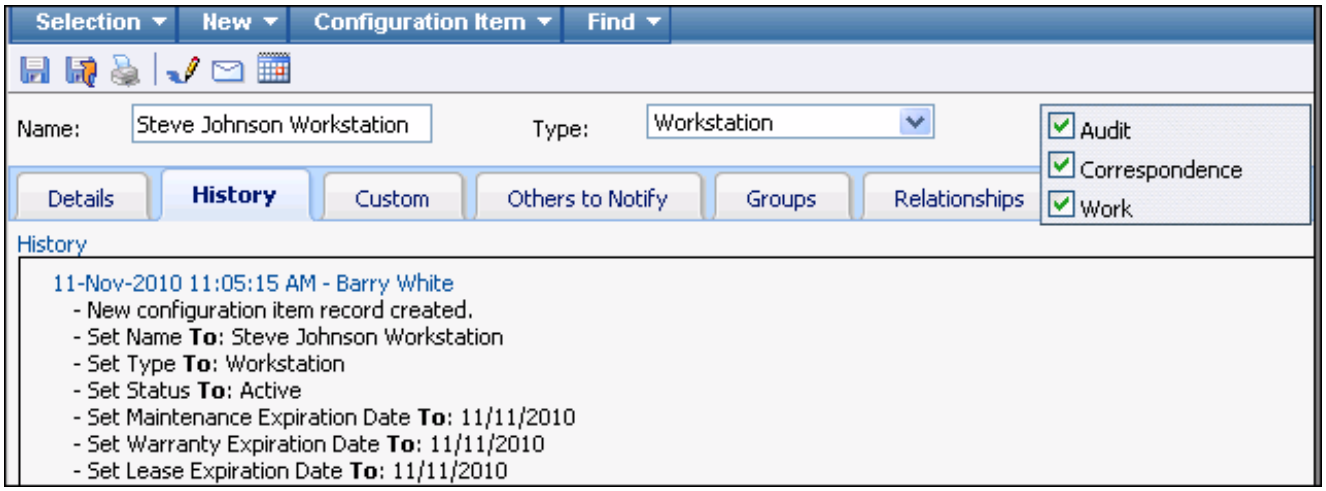


Field	Description
Name	Enter a name for the configuration item.
Type	CMDB types are created in the Configuration module; the following fields can be configured to appear for each CMDB type.
Source	"Direct Entry" will appear in this field if the item was created via the Configuration Item screen; "Auto Create" will appear if the item was automatically created via an agent in the Configuration module.
Owner	This field appears if configured for the selected type; select a customer or support representative to assign to the configuration item. After an entry is made you can click the Details icon to view the person's contact information and other details.
Vendor	This field appears if configured for the selected type. You'll be able to select from a list of customers, support representatives, or companies that have been designated as vendors in the Configuration module.

Field	Description
Associated Item	If one or more associated items are configured for the CMDB type, click this link to associate a specific Asset, Company, Customer, Support Representative Profile record or a member of a customer or support representative group. You can utilize the data on an associated item for views, reports, and correspondence; for example, if a group is included on an associated asset record, you can send a correspondence to that group from the Configuration Item screen. You can also associate a configuration item via the Associated Configuration Item field on the Miscellaneous tab in the Asset, Company, Customer, or Support Representative Profile screen. If a configuration item was automatically created via an agent in the Configuration module, an asset, company, customer, or support representative will appear in this field and "Auto Create" will appear in the Source field.
Location	This field appears if configured for the selected type. This field is included for informational viewing and reporting; it is not related to the Location field on the Support Representative Profile and Customer Profile screens.
Status	This field appears if configured for the selected type. Select the status to assign to the configuration item. Status labels are configurable; in addition to status labels such as Active and Retired, status labels can designate stages in the life cycle of a configuration item (such as Designed, Ordered, Under Development, In Test, Implemented, In Production, and Under Maintenance).
Maintenance	This field will appear if configured for the selected type. Enter the date on which the maintenance contract ends. Expiration notifications may be configured to be sent before this date.
Warranty	This field will appear if configured for the selected type. Enter the date on which the warranty for the configuration item ends. Expiration notifications may be configured to be sent before this date.
Lease	This field will appear if configured for the selected type. Enter the date on which the lease for the configuration item ends. Expiration notifications may be configured to be sent before this date.
Hours of Operation	This field will appear if configured for the selected type. It is used for informational viewing and reporting; it is not related to service contracts or SLAs.
Comments	This field will appear if configured for the selected type. Enter any comments regarding the configuration item.
Description	Enter a description of the configuration item.

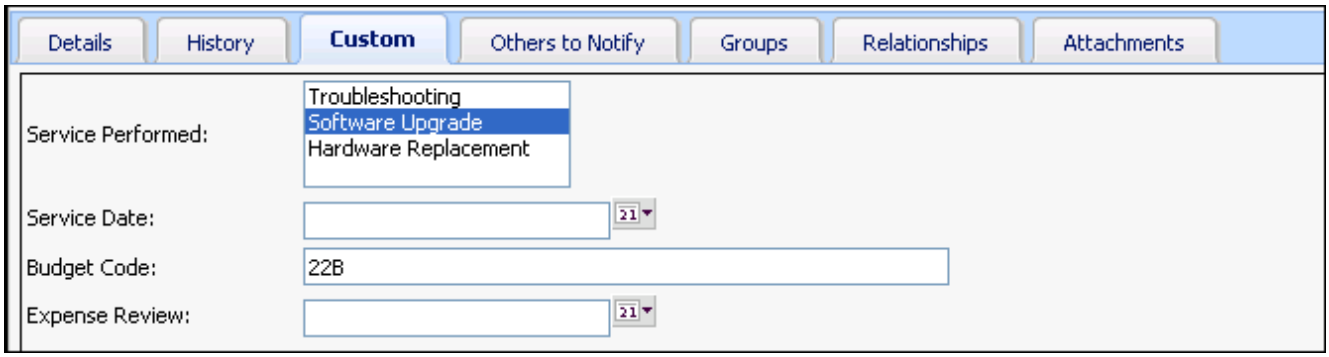
Viewing Audit History

After you save a CI record, an entry appears on the Audit History tab. This tab includes a notation of every action performed on the record with the date, time, and author stamp.



Completing Custom Fields

If custom fields have been set up for the specified CMDB type and/or for the Configuration Item screen, the fields will appear in the Custom Fields section as shown in the example below. You may be required to enter information in these fields.



Specifying Others to Notify

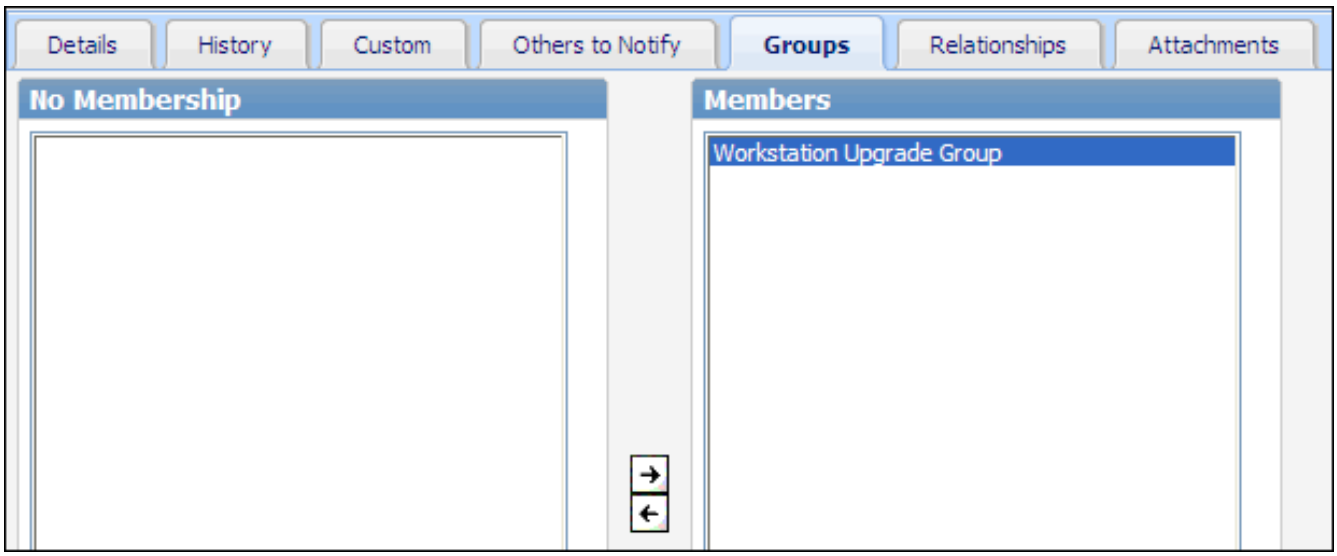
If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and support representatives to be sent event notifications and other correspondence. For example, notifications could be configured to be sent to a salesperson whenever the status changes for a configuration item.

To add someone to the Others to Notify list for a CI, click the Add link. Use the Remove link to delete anyone from this list.

When you create a correspondence document from the Configuration Item screen or the Desktop, you can choose to copy (CC) those in the selected customer's Others to Notify list. When event notifications are set up in the Configuration module, Others to Notify lists can be included in the To field or in the CC field. The comprehensive Others to Notify list will be used for these system-generated notifications.

Assigning to Groups

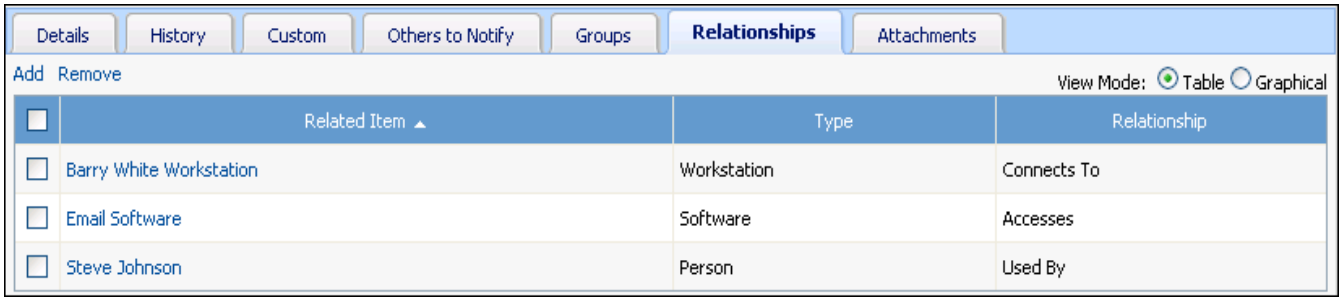
Use the Groups tab to assign a CI to a configured CMDB group. CMDB groups associate a collection of CIs for access, views, and reports. CMDB groups may be configured to control access; only support representatives in the group will be able to edit CI records in the CMDB group (or any other CMDB record not included in a CMDB group). After you add one or more groups and save, the CI will be available only to members of the selected groups.



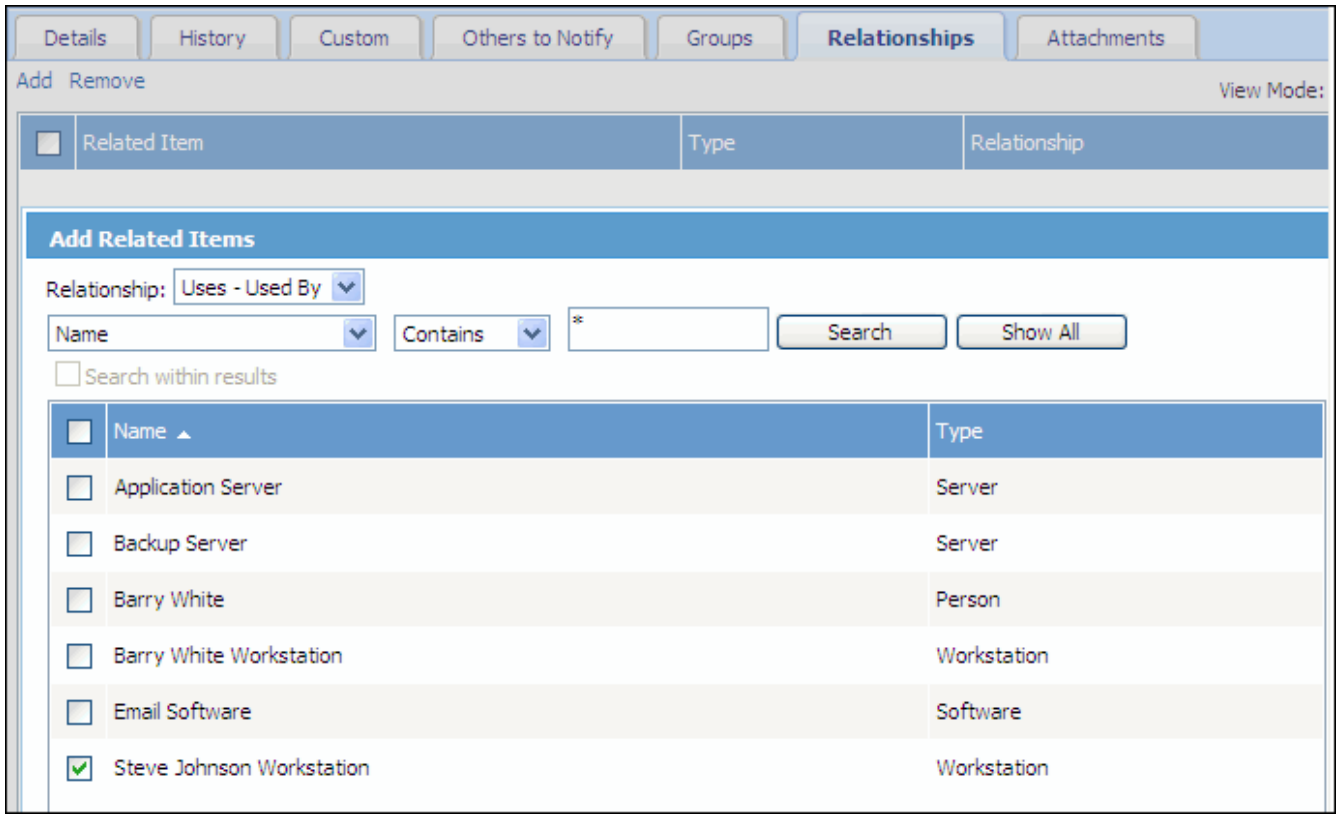
Field	Description
No Membership Membership	The No Membership field includes CMDB groups set up in the Configuration module. ■ To assign the CI record to a group, select the group in the No Membership field and click the → icon. ■ To remove the CI record from a group, select the group in the Membership field and click the ← icon.

Assigning Relationships

Use the Relationships tab to select predefined relationships and configuration items and to be associated with the current CI record.

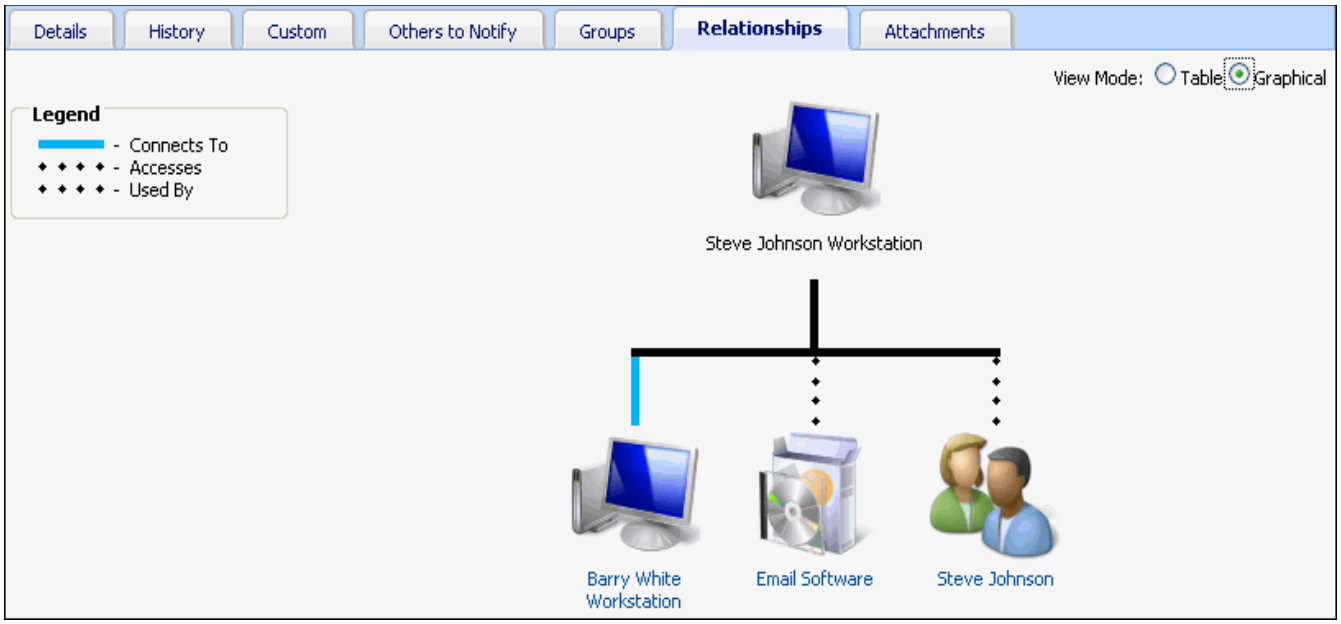


To add a relationship with another configuration item, click the Add link. Select the relationship and then select the configuration item to be associated with the current CI record.



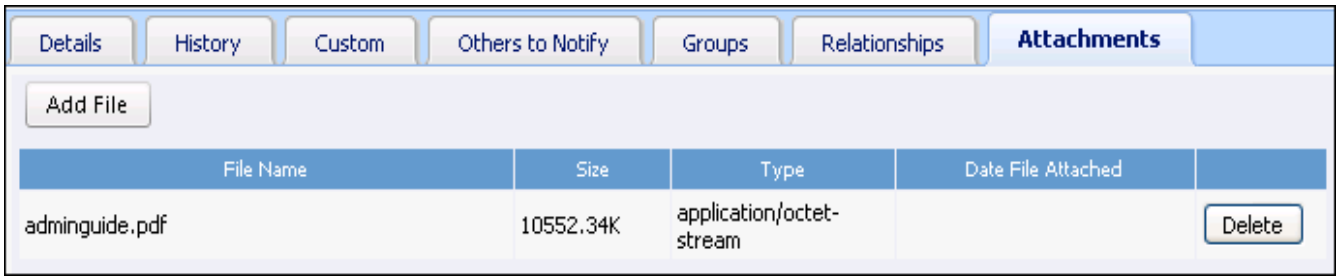
You can select the Graphical option in the View Mode field to display the Relationship Viewer, which displays the configuration items related to a specified configuration item as shown below.

You can click on a different configuration item icon to view its relationships, and refresh to go back to the original configuration item.



Attaching Files

To attach a file to the CI, click on the Add File button on the Attachments tab and select the file. The file name appears in the Attachment field.



Saving a CI Record

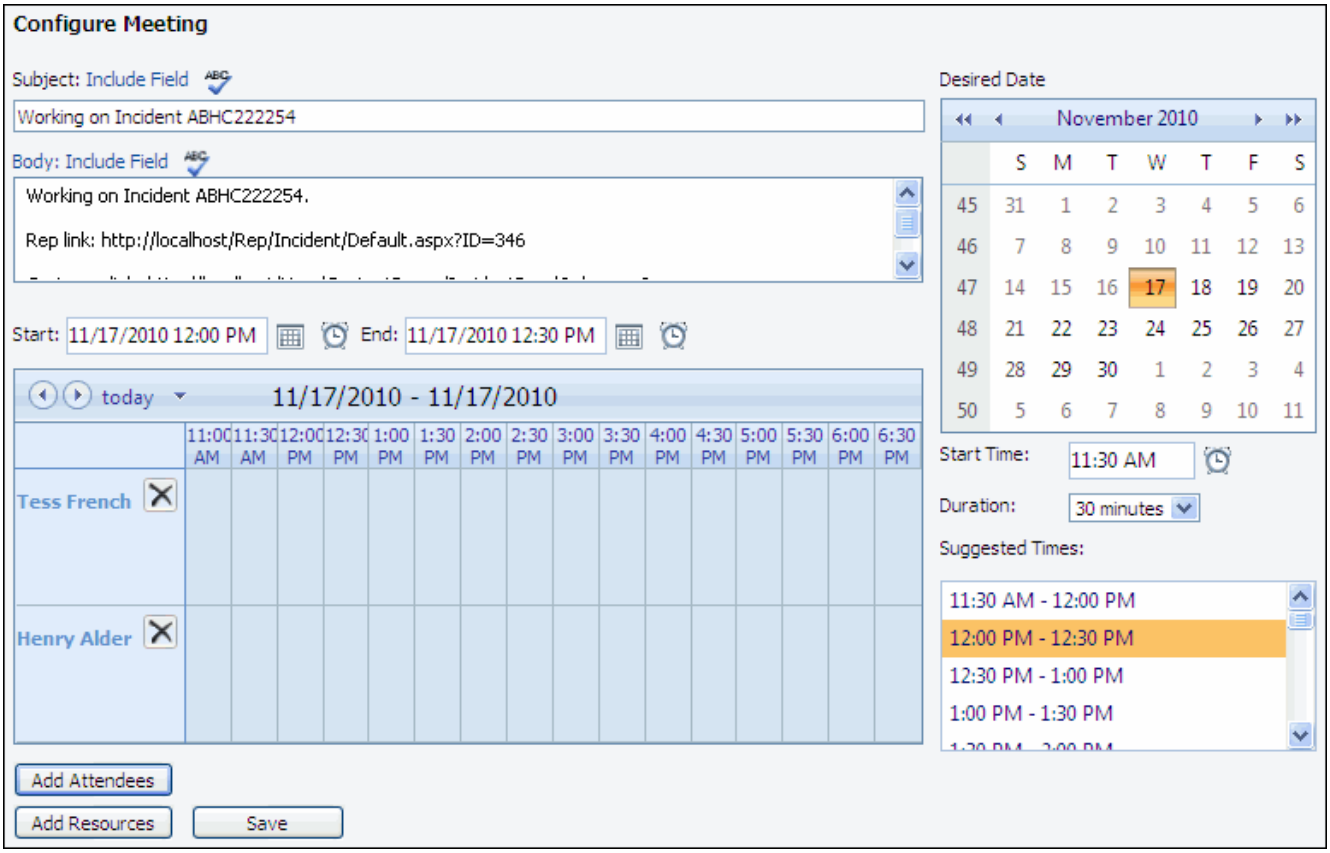
To save a CI record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save or Save and Close Window icon.

Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Configuration Item screen after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the

schedules of meeting attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Configuration Item *<c onfiguration item number>*" will be included by default in the meeting entry along with a link to the record via the Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees.

After saving, the View Meetings link will appear in the Configuration Item screen for displaying meeting details.

Searching from the Configuration Item Screen

You can select the following via the Find menu:

- Associated Incidents to search for incidents that have been associated with the configuration item (via the Configuration Items tab in the Incident screen).
- Associated Problems to search for problems that have been associated with the configuration item (via the Configuration Items tab in the Problem screen).

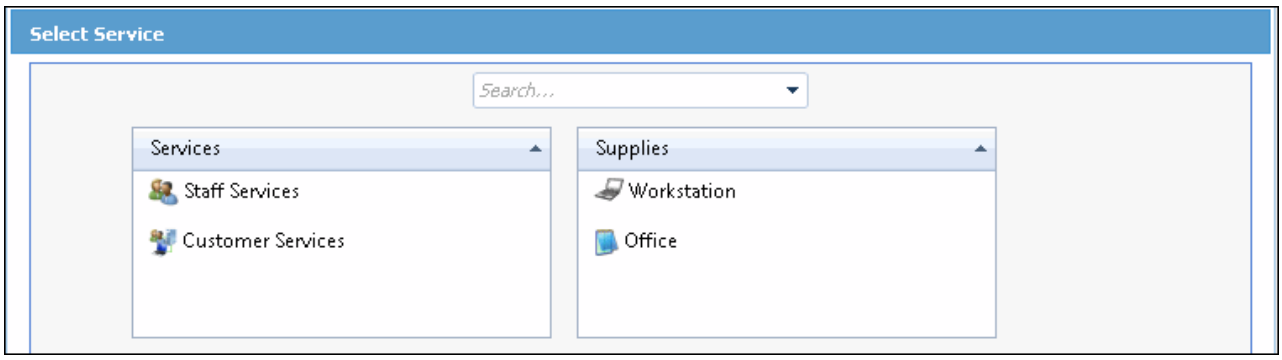
- Associated Changes to search for changes that have been associated with the configuration item (via the Configuration Items tab in the Change screen).
- Correspondence to display all correspondence sent from the current configuration item.

Creating Service Requests

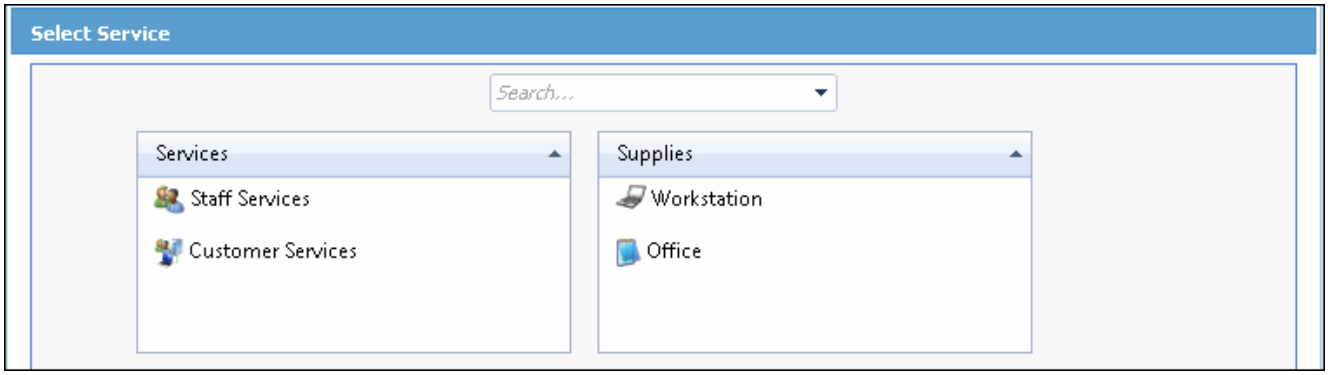
Service Catalog functionality is available if you have the Service Desk edition. It enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the End User Desktop. Note that access to an entire service catalog or individual service catalog entries may be restricted to specific customer and support representative groups.

Service catalogs are entered in the Configuration module; each contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

The catalog will appear as follows to customers using the End User Desktop. Note that display of the dollar amount next to an entry is controlled by the Can View Service Cost field in the customer's Profile record. The Total Cost amount includes the cost of all selections (including line items from the purchase template).



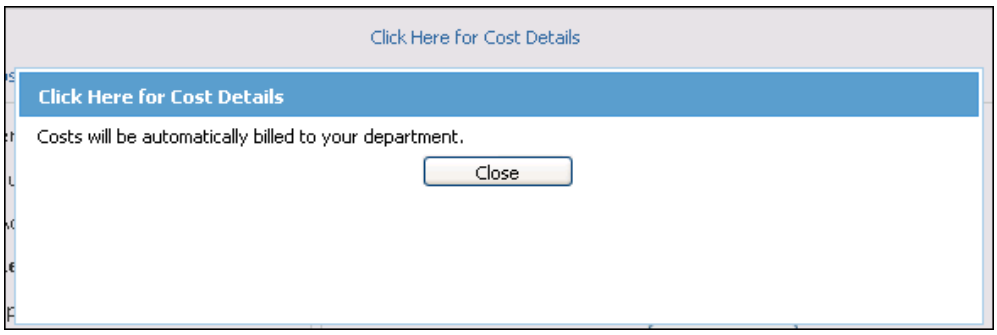
The catalog will appear as follows to support representatives using the Desktop; it is accessed via the Service Request option on the Desktop action menu.



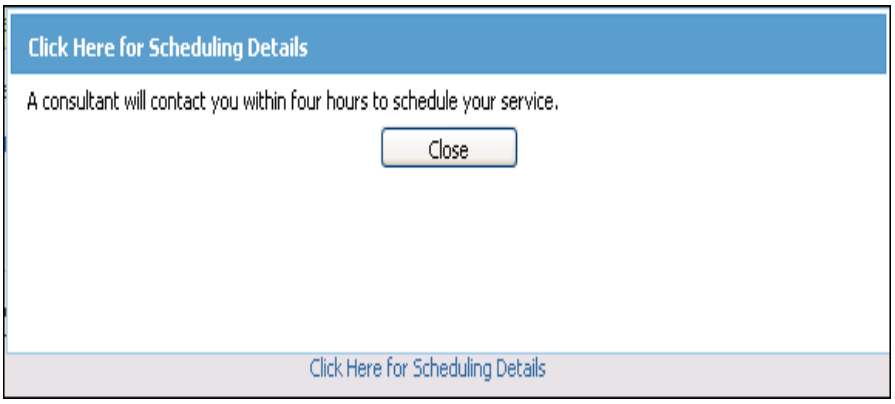
Service catalog entries can also be configured as radio buttons.

The links at the top and bottom of the screen display a dialog with any configured informational details.

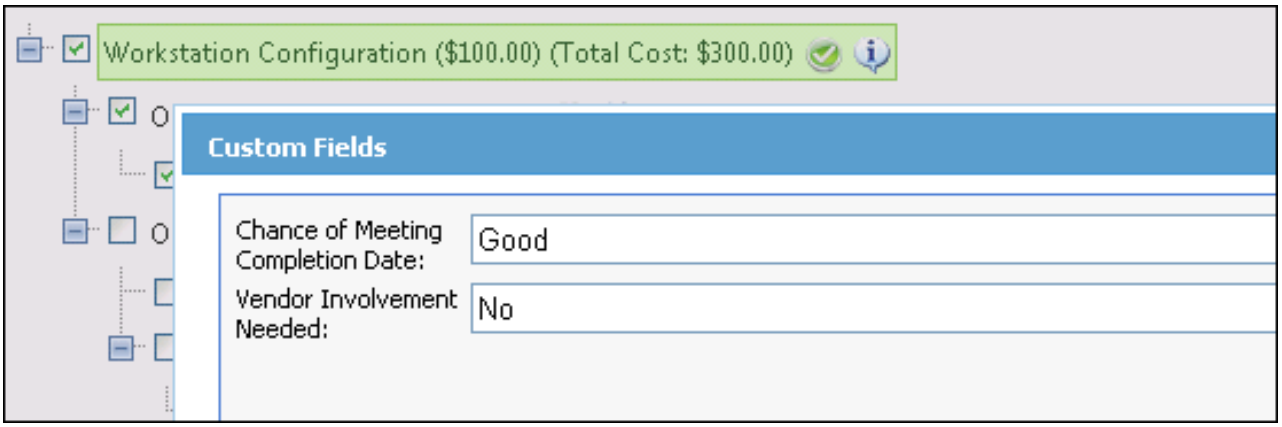
Header



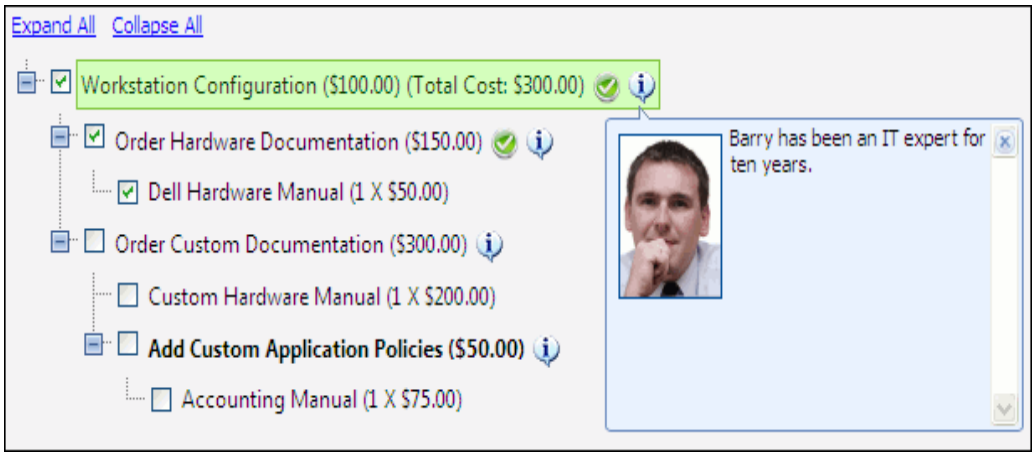
Footer



If a checkmark icon appears next to an entry, you can click it to view and complete any configured Change or Purchasing custom fields.



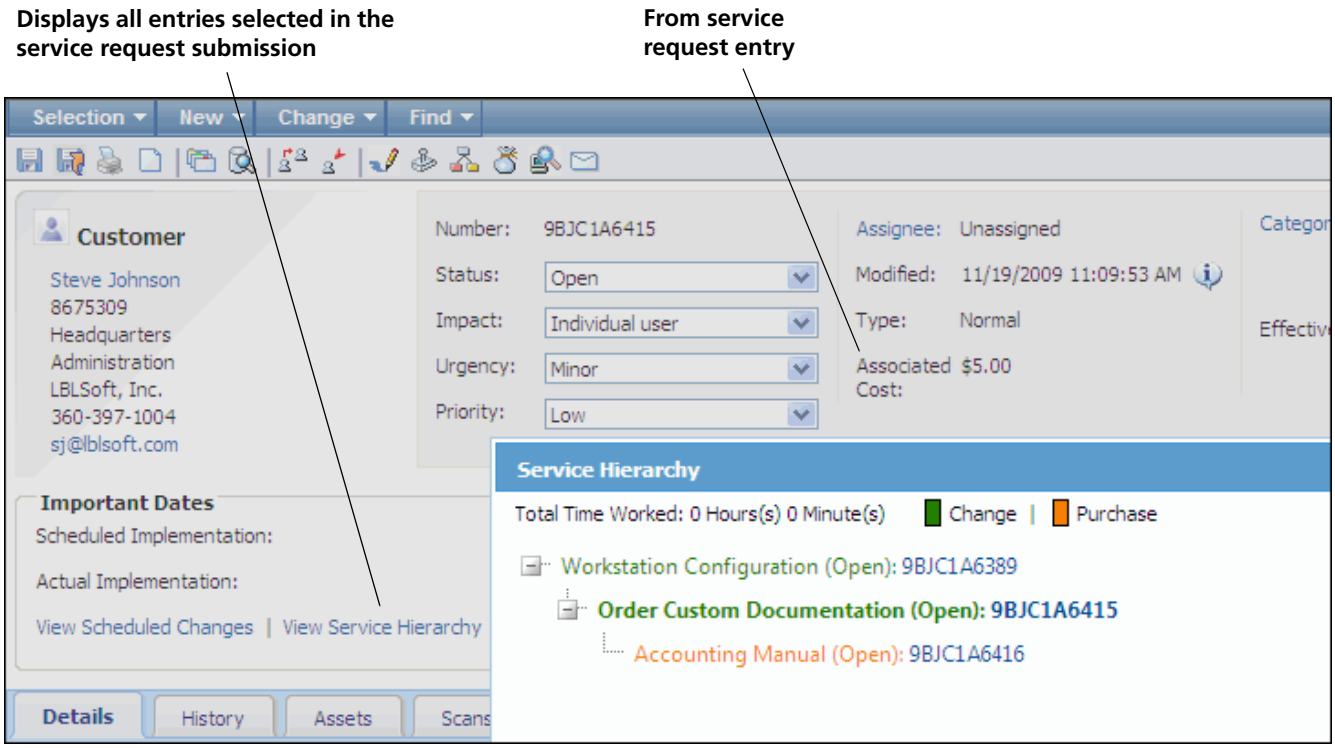
The Details icon displays a dialog with text and images configured for the entry.



Viewing Records Created via Service Requests

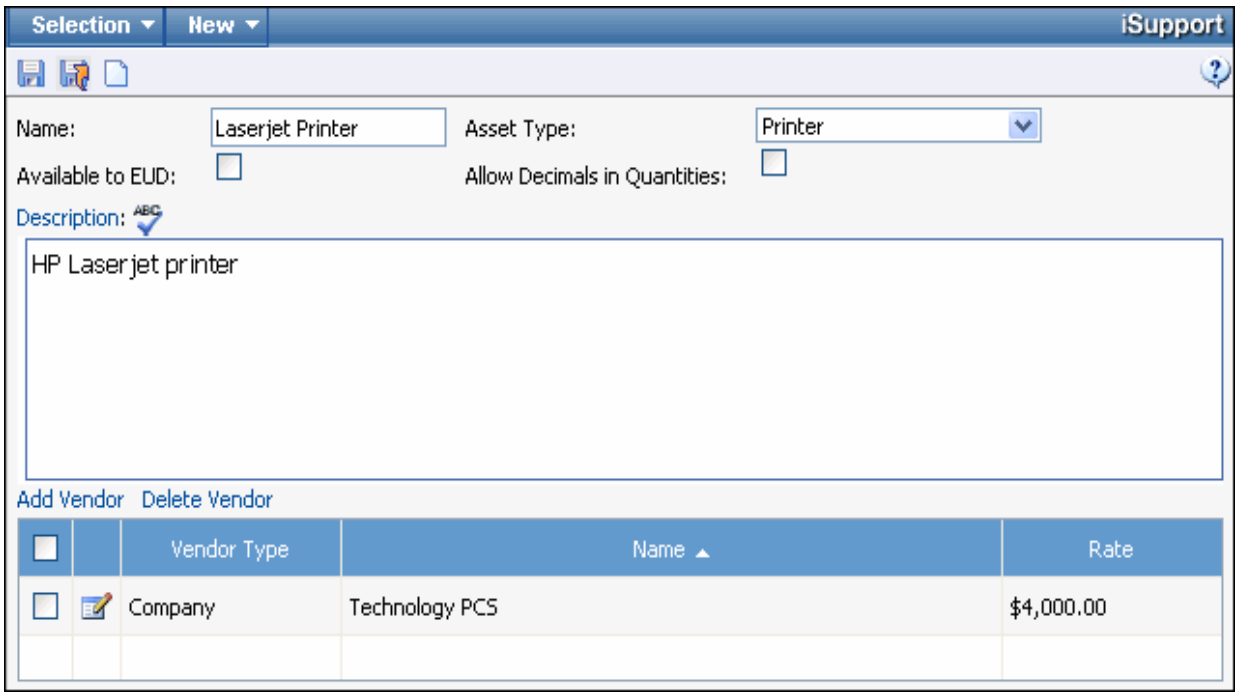
After a service catalog request is submitted by a customer, a Purchase Order or Change record will be created from the corresponding template and any configuration item specified for the service catalog entry will be associated with it. Custom fields may be completed by the customer or support representative.

Any associated cost configured for an entry will be included on the Change or Purchase Order record created from the entry. A View Service Hierarchy link will also appear for displaying all of the selected entries in the service request submission; click on a number to open a record.



12 Creating Purchase Requests

If you have the Service Desk Edition, you can use iSupport's Purchasing functionality to track products and services, submit purchase requests, and associate orders with Incident, Problem, Change, and Asset records. You create Product records using predefined asset types, designate customers, companies, and support representatives as vendors, and then associate vendors with products. The Product screen is shown below.



Purchasing functionality can be controlled via approval cycles and support representative permissions, and can include work history charges, custom fields, attachments, and cost center and job function fields for reporting. Asset records can be created from purchase orders when items

are received. You can use templates for frequent purchase requests. The Purchase Request screen is shown below.

Selection New Purchase iSupport

Recipient: Steve Johnson
Requested By: Barry White
Bill To: Unassigned
Author: Barry White
Number: 9B5L575669
Status: Open
Request Number: 8675309
Modified: 11/5/2009 8:51:59 PM
Cost Center: Accounting
Job Function: Manager

Short Description:
Printer for Accounting

Details | History | Custom | Attachments | Associated Work Items | Assets | Approvals

Comments:
HP Laserjet 4000 printer replacing outdated printer in Accounting department.

Add Line Item Delete Line Item

		Asset Type	Vendor	Product	Comments	Delivery	Expected	Quantity	Rate	Amount	Asset Create
☐		Printer	Technology PCS	Laserjet Printer More...			11/12/2009	0 / 1	$4,000.00	$4,000.00	☐
										Total: $4,000.00	

If the approval cycle is complete and results in an approval or if there is no approval cycle, a purchase request becomes a purchase order after the record is saved. It will be fully editable by those with Edit permission; only the received quantity can be changed by those with no Edit permission. When an item is received, a date is entered in the Delivery field and the quantity is entered before the slash in the Quantity field.

If the Asset Create checkbox is enabled for a line item and all of the expected quantity for a line item is received, Asset records are created for the total quantity. On those Asset records, if a customer is the recipient on the order and the asset type uses the Owner field, the Customer field will be populated. A link to the purchase order will be included in the History section of the Asset record and a link to the newly created Asset records will be included in the History section of the purchase order.

When the expected quantity for all line items has been received, the order can be closed. Closed orders cannot be reopened or edited; at any time, a support representative can set the status to a Closed status even if some items have not been received.

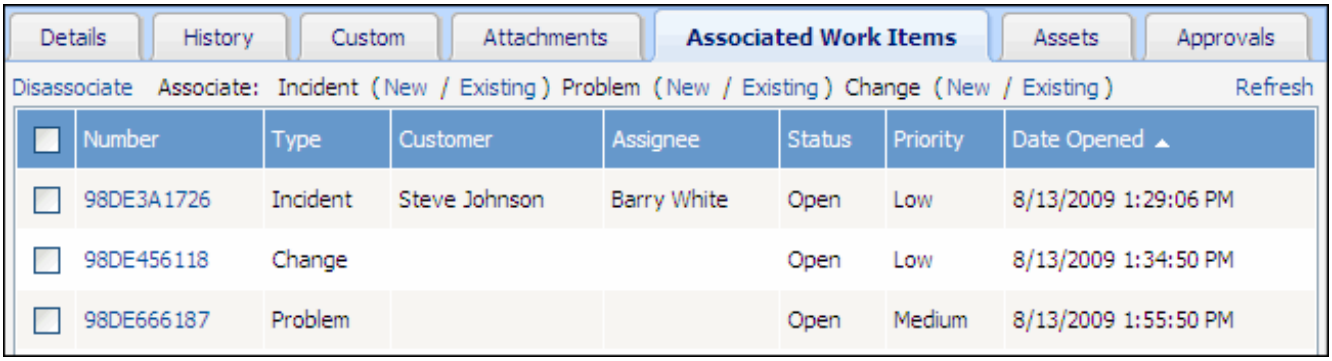
Count Tracking

You can enable count tracking for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit List Price fields to appear in the Asset screen if the type is selected. When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can enter the number of units used and decrement the unit count. A notification can be configured to be sent when a specified count is reached.

If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

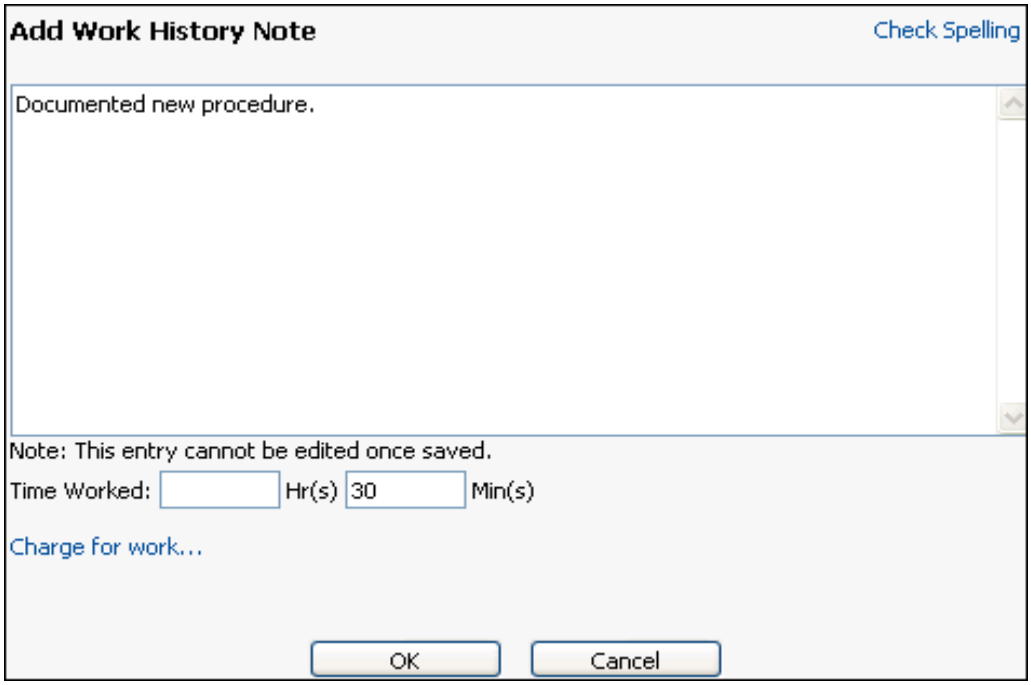
Associating Purchase Orders With Other Records

In the Incident, Problem, and Change screens, you can select New | Associated Purchase Request or click the New Purchase Request link on the Associated Work Items tab to display the Purchase Request screen for creating a new request. In the Incident, Problem, and Change screens, click the Existing Purchase link in the Associated Work Items tab to associate an existing purchase order.



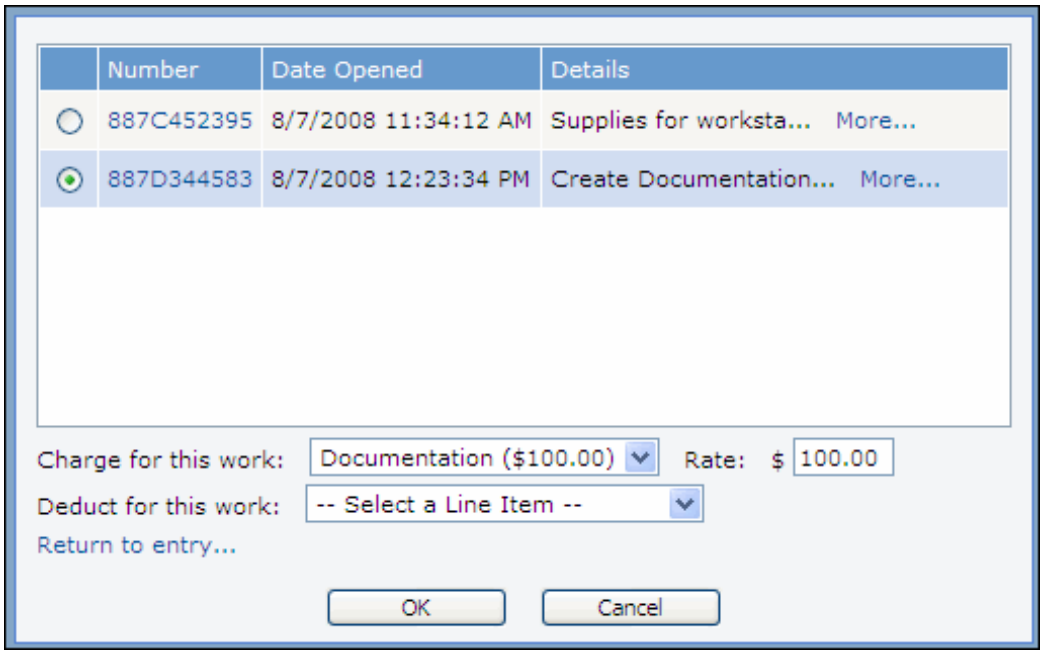
Charging Time Worked Against Purchase Orders

When entering time worked in the Incident, Problem, and Change screens, you can add a charge (an amount of time worked multiplied by a rate) as a separate line item or use a charge to decrement an existing line item on an associated purchase order. After entering the time worked, click the Charge for Work link.

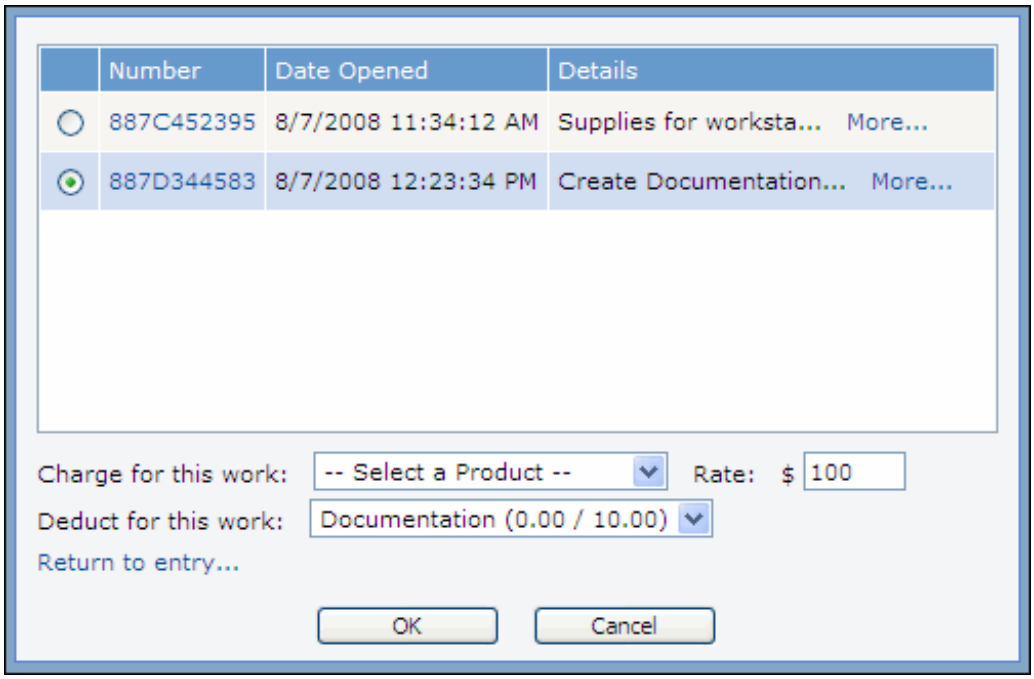


The purchase orders associated with the incident, problem, or change appear; select the purchase order for which the charge should be applied. Then:

- To **add a separate line item charge** to the purchase order (increasing the total amount), choose the product from the selected purchase order in the Charge For This Work field. In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog. Click OK

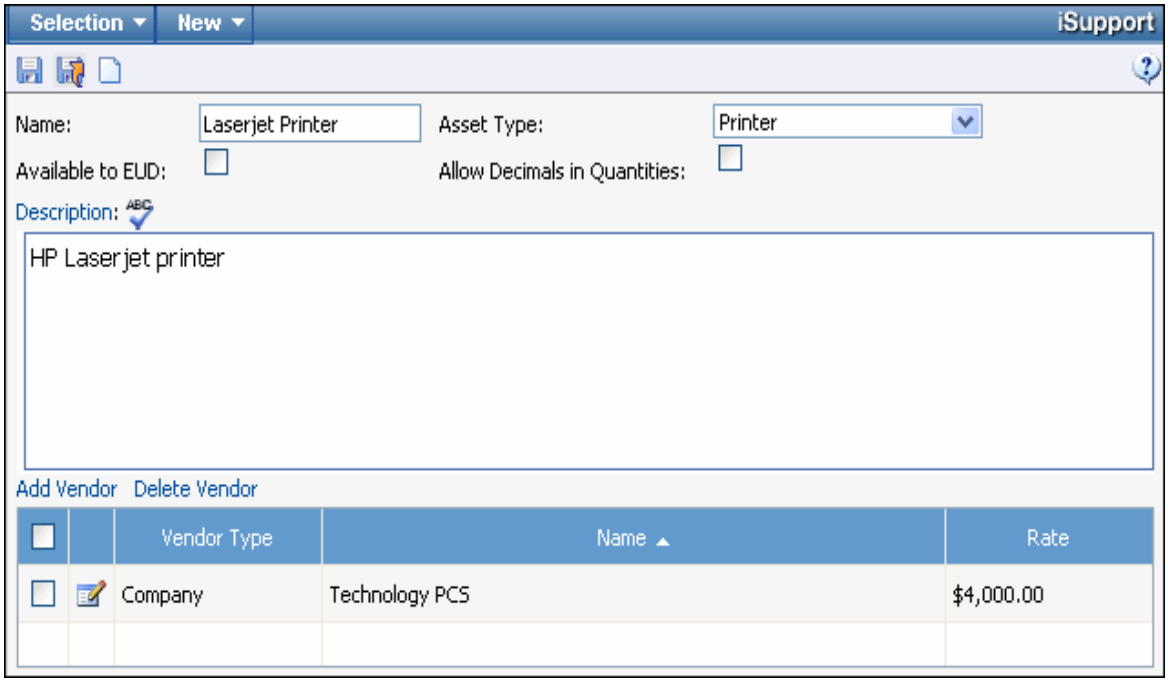


- To **use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order and click OK.



Creating a Product Record

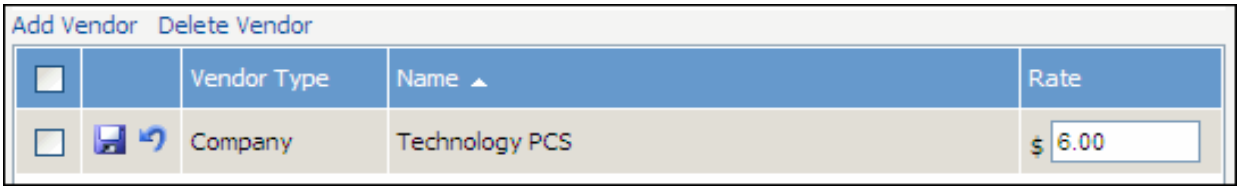
Use the Product screen to create Product records for use in purchase requests. To access the Product entry screen, select Create | Product from the Desktop.



Field	Description
Name	Enter the name of the product. This name will appear for selection in the Purchase Request screen.
Asset Type	Select the predefined asset type that applies to the product. Count tracking can be enabled for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit List Price fields to appear in the Asset screen if the type is selected. If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.
Available to EUD	Select this checkbox to enable the product to be available for selection for purchase requests submitted via the iSupport End user Desktop.
Allow Decimals in Quantities	Select this checkbox to enable users to enter a decimal point to be entered in the Quantity field in the Purchase Request screen.
Description	Enter a description for the product.

Adding Vendors

Click the Add Vendor link to create a list of vendors that can be selected for the product in the Purchase Request screen. You'll select customers, companies, and support representatives that have been designated as vendors, and enter a rate to appear by default in the Purchase Request screen. The rate will be multiplied by the quantity entered in the Purchase Request screen. After making an entry, use the Save icon to save it or the Cancel icon to undo your entry. Use the Edit icon to modify an entry.

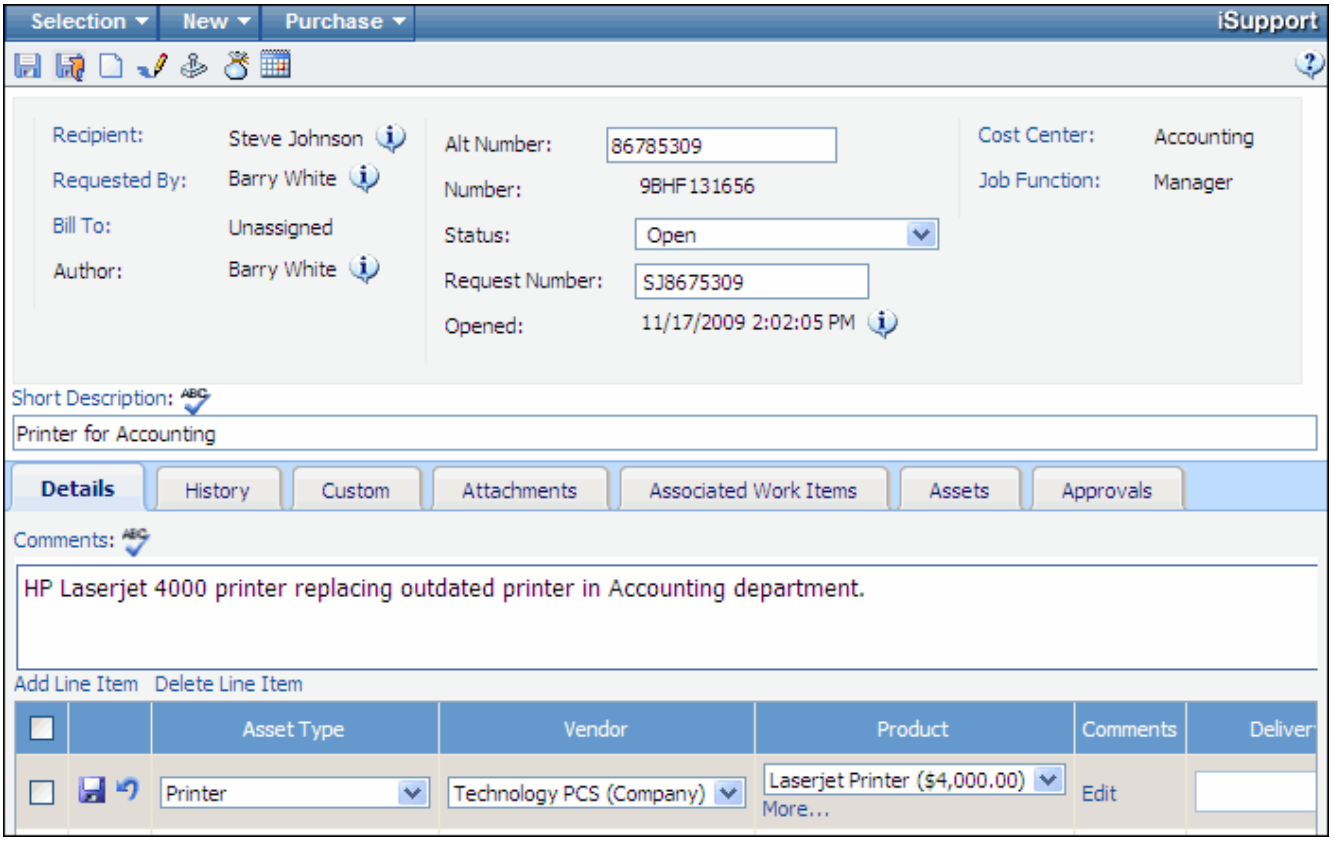


Field	Description
Vendor Type	Select the type of vendor: support representative, customer, or company.
Name	Select a support representative, customer, or company for the product. Support representatives are designated as vendors in the Support Representative Profile screen, customers are designated in the Customer Profile screen, and companies are designated in the Company screen.
Rate	Enter the cost to be multiplied by the entry in the Quantity field in the Purchase Request screen; the result will be included in the Amount field for the purchase request line item.

Creating a Purchase Request

Purchasing functionality can be controlled via approval cycles and support representative permissions, and can include work history charges, custom fields, attachments, and cost center and job function fields for reporting. Asset records can be created from purchase orders when items are received. You can create templates for frequent purchase requests.

The Purchase Request screen is shown below; complete the following fields on the Details tab.



Field	Description
Recipient	Select a customer or support representative who will receive the products on the purchase request. If a cost center (and job function if configured) is associated with a customer or company in his/her Customer Profile record, it will appear in the Cost Center and Job Function fields.
Requested By	Select the customer or support representative who requested the products on the purchase request. Purchase order event notifications may be configured to be sent to the person selected in this field.
Bill To	Select the customer or support representative to be billed for the purchase request. Purchase order event notifications may be configured to be sent to the person selected in this field.

Field	Description
<custom number label> ("Alt Number" in this example)	A custom number field may be configured; the number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. If configured, the field may be read-only after you enter the number and save the record.
Status	Select the status of the purchase request: Open or Closed. Custom labels can be configured for the Open and Closed status levels.
Request Number	Enter a number for the purchase request.
Cost Center	If cost centers have been defined in the Configuration module, select a cost center for the purchase request.
Job Function	If job functions have been defined in the Configuration module, select a job function for the purchase request.
Short Description	Enter a description of the purchase request.
Comments	Enter any additional information regarding the purchase request. If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Comments field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. The icons in the toolbar will display tooltips with keyboard shortcuts. You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB. When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Entering Line Items

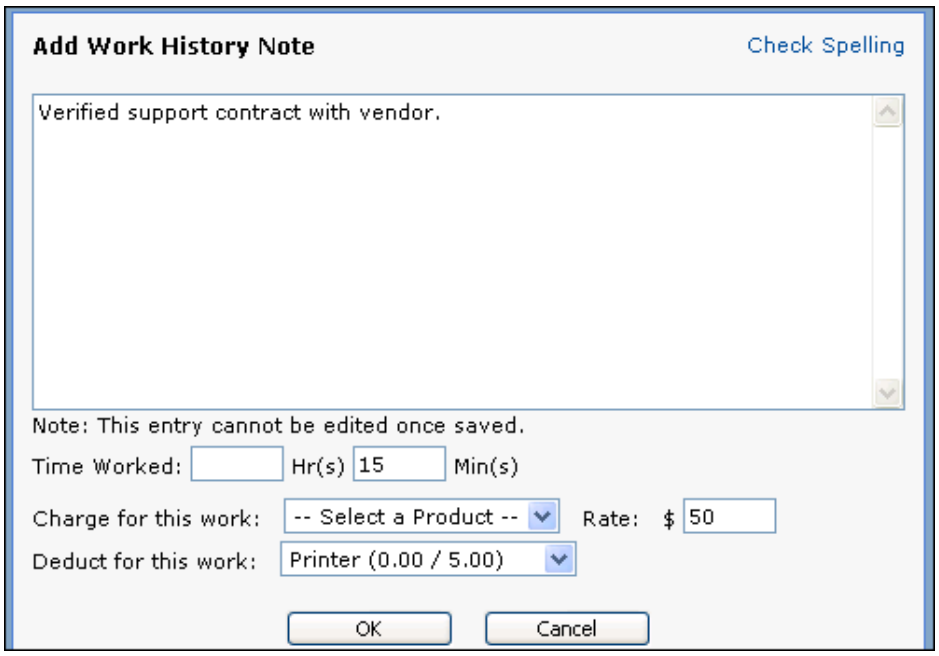
To create a line item for the purchase order, click the Add Line Item link. After making an entry, use the Save icon to save it or the Cancel icon to undo your entry. Use the Edit icon to modify an entry.

Field	Description
Asset Type	Select the predefined asset type associated with the product to be included on the purchase request line item. Count tracking can be enabled for asset types; if a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.
Vendor	Select the vendor associated with the product to be included on the purchase request line item.
Product	Select the product to be ordered on the purchase request line item.
Comments	Enter any comments regarding the product on the purchase request line item.
Delivery Date	Select the date on which the product was delivered.
Expected	Select the date on which the product is expected to be delivered.
Quantity	In the field after the slash, enter the amount of product needed. In the field before the slash, enter the amount of product delivered.
Rate Amount	Enter the cost to be multiplied by the entry in the Quantity field; the result will be included in the Amount field for the purchase request line item.
Asset Create	Select this checkbox to create Asset records when line items are received. If a customer is the recipient on the order and the asset type uses the Owner field, those records will be populated with the customer. A link to the purchase order will be included in the History section of the Asset record and a link to the newly created Asset records will be included in the History section of the purchase order.

Entering Work History

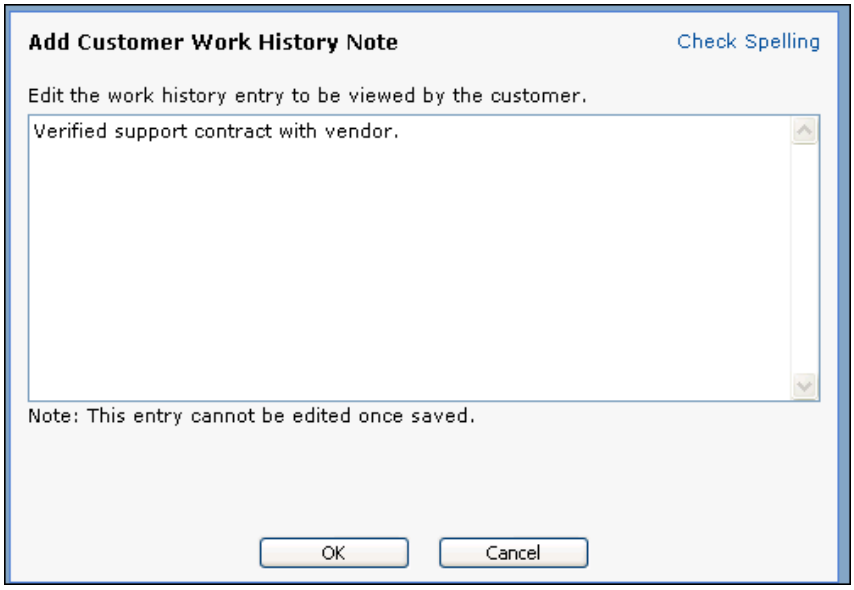
To enter information on any activities related to the purchase request, click the icon or the Add Work History link on the History tab. For example, you can document customer contacts or

conversations with customers or support staff. If configured, you may be required to make an entry in the Time Worked field after entering work history.



Using the Customer Work History Field

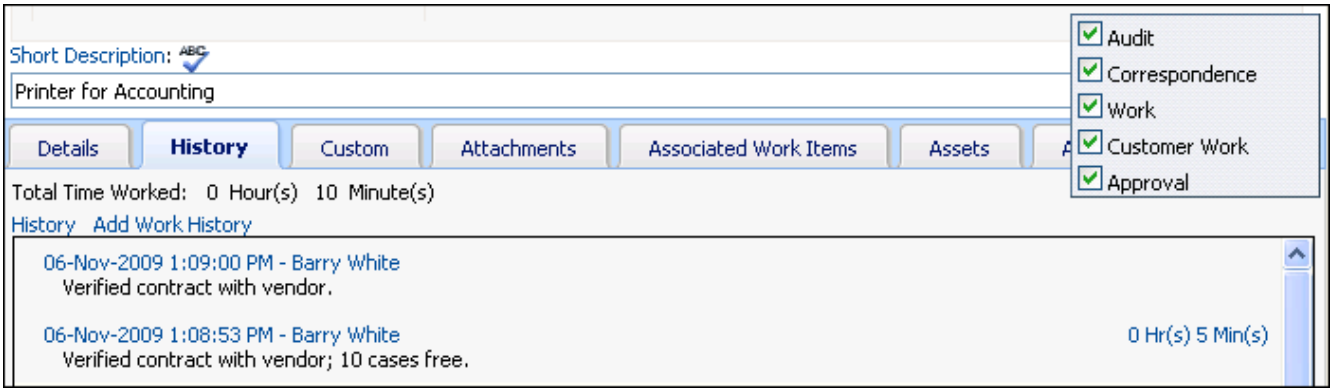
If set up during configuration, the Customer Work History can be can be set up to include editable contents of the Work History field. After clicking OK in the Work History dialog, the Edit Customer Work History Note dialog will appear. Depending on how it is configured, it may be blank for you to enter comments or it may include the contents of the Work History field. You may or may not be able to edit the text. This information will be labeled “Work History” on the End User Desktop purchase request fields.



If configured, Customer Work History notes will be sent to the customer in an email.

Viewing Work History, Customer Work History, and Audit History

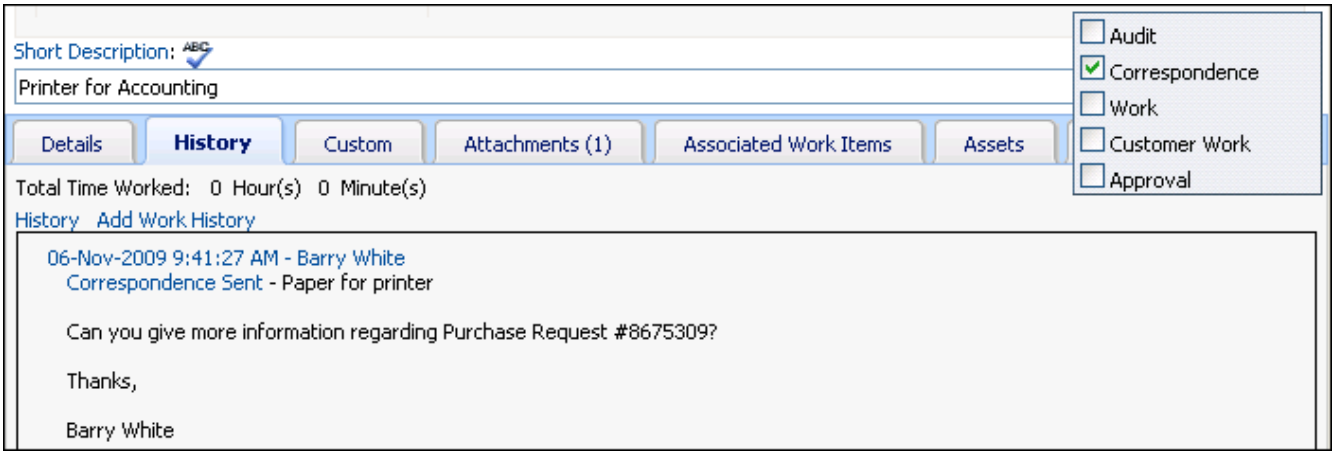
Use the History tab to view notations on all purchase request actions.



- To view Work History entries, select the Work checkbox.
- To view customer work history entries, select the Customer Work checkbox.
- To view a notation of every action performed on the purchase request including the date, time, and author stamp, select the Audit checkbox.

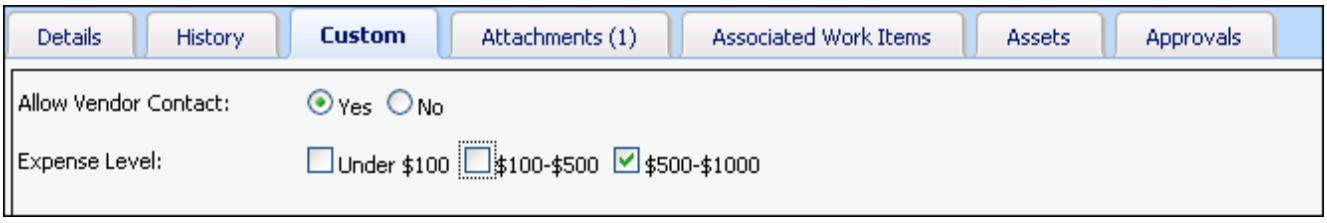
- To view a notation of every approval action, select the Approval History checkbox.

- The Correspondence checkbox displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen.



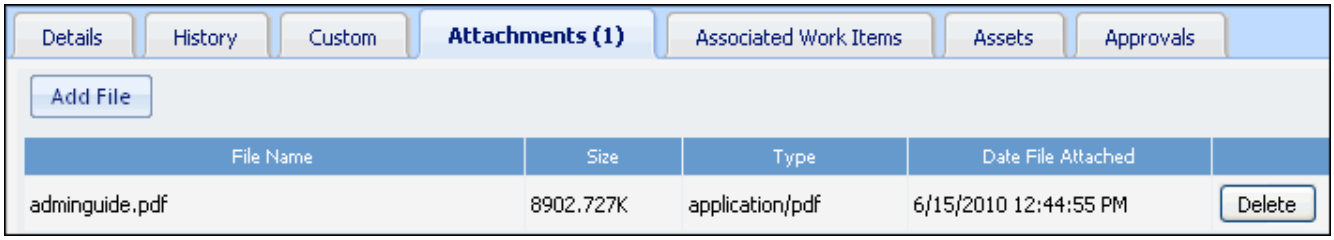
Completing Custom Fields

The fields on the customizable tab are used to enter information specific to your company. The name of the tab is specified during configuration. You may be required to enter information in these fields.



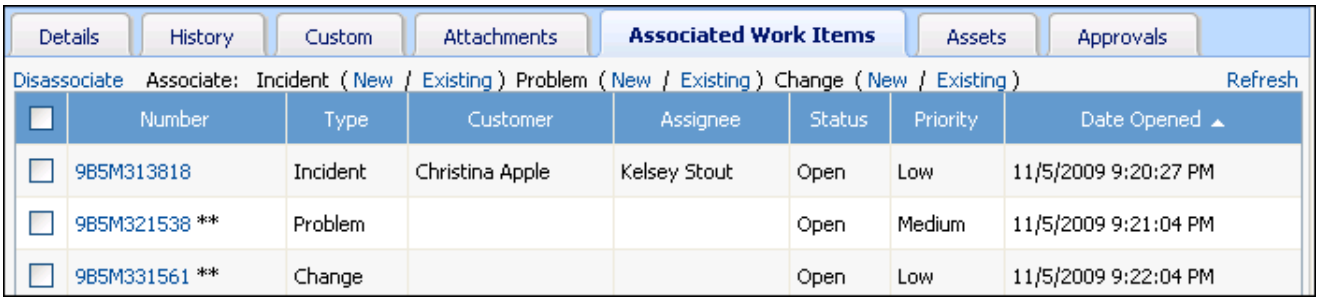
Attaching Files

To attach a file to the purchase request, click on the Add File button on the Attachments tab and select the file. The file name appears in the Attachment field.



Associating Incidents, Problems, and Changes

Use the links on the Associated Work Items tab to associate a new or existing Incident, Problem, or Change record (if enabled) with the purchase request. If you create a new incident, problem, or change, the Description will be included in the corresponding fields on the record. See "Working with Problem Records" on page 263 for information on entering Problem records; see "Working with Change Records" on page 297 for information on entering Change records. To disassociate an Incident, Problem or Change record, select the record and click the Disassociate link.

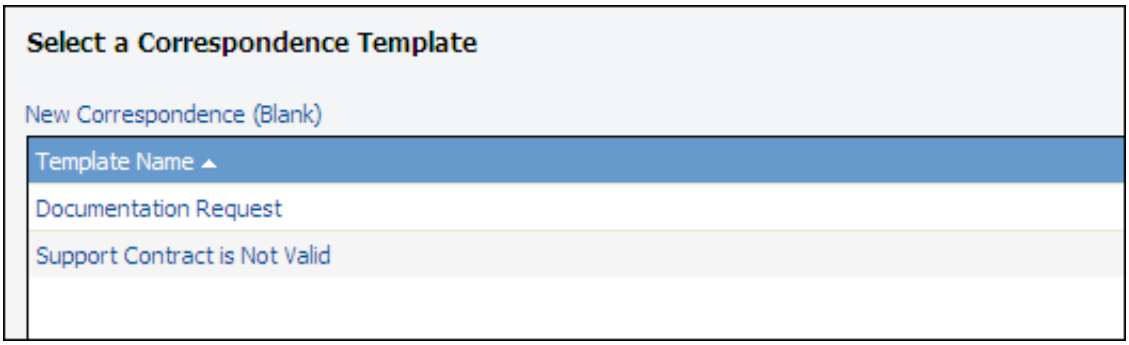


Sending an Email From a Purchase Request

To send an email from the Purchase Request screen, you can:

- Select New | Correspondence.
- Click the New Correspondence icon.

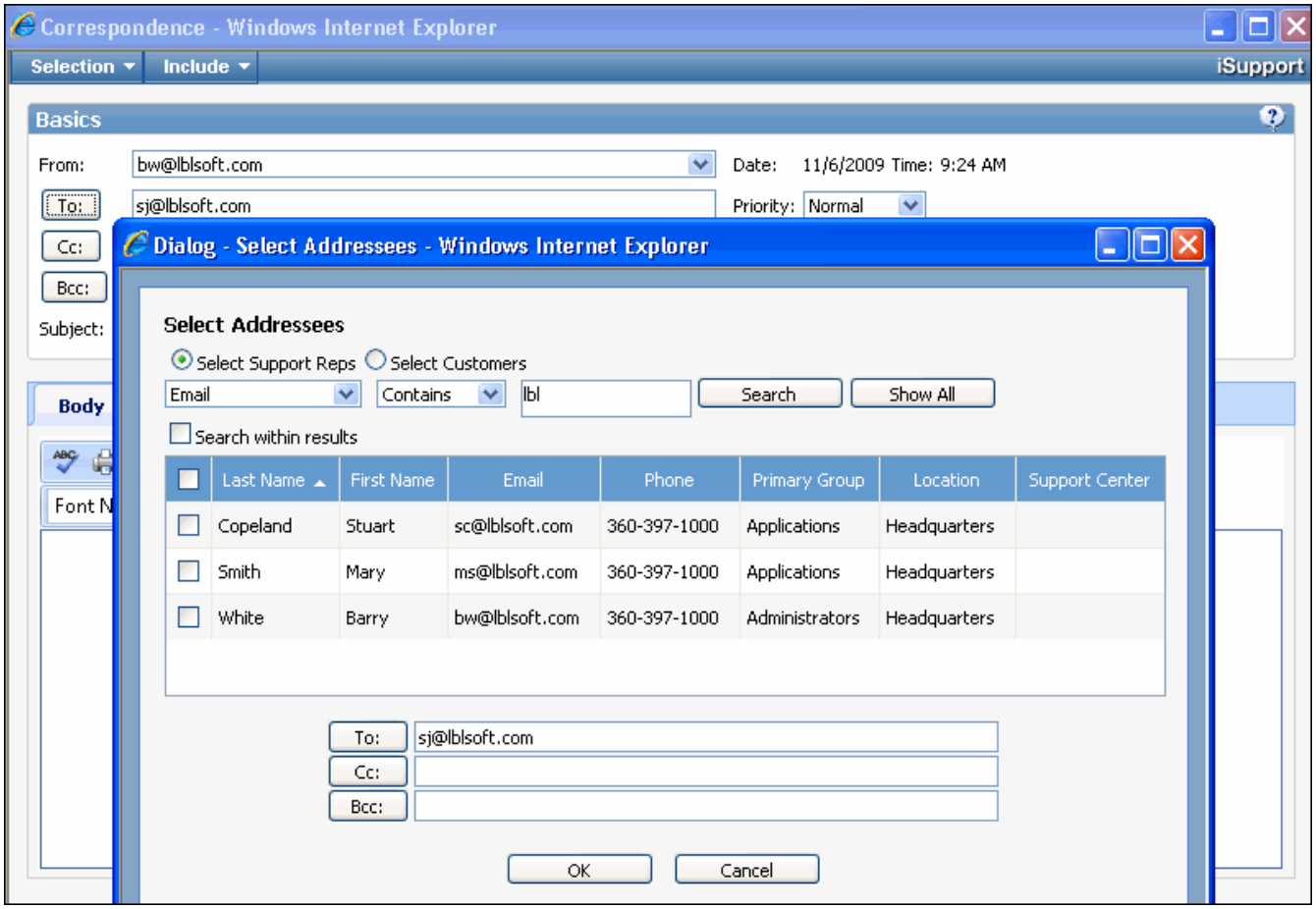
You can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).



Correspondence templates may be configured to contain only read-only (greyed out) fields.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included. By default, the To field contains the email address set up for the recipient in his/her Customer Profile record. If creating a new correspondence document, the CC, BCC, Subject, and Attachments fields are blank.

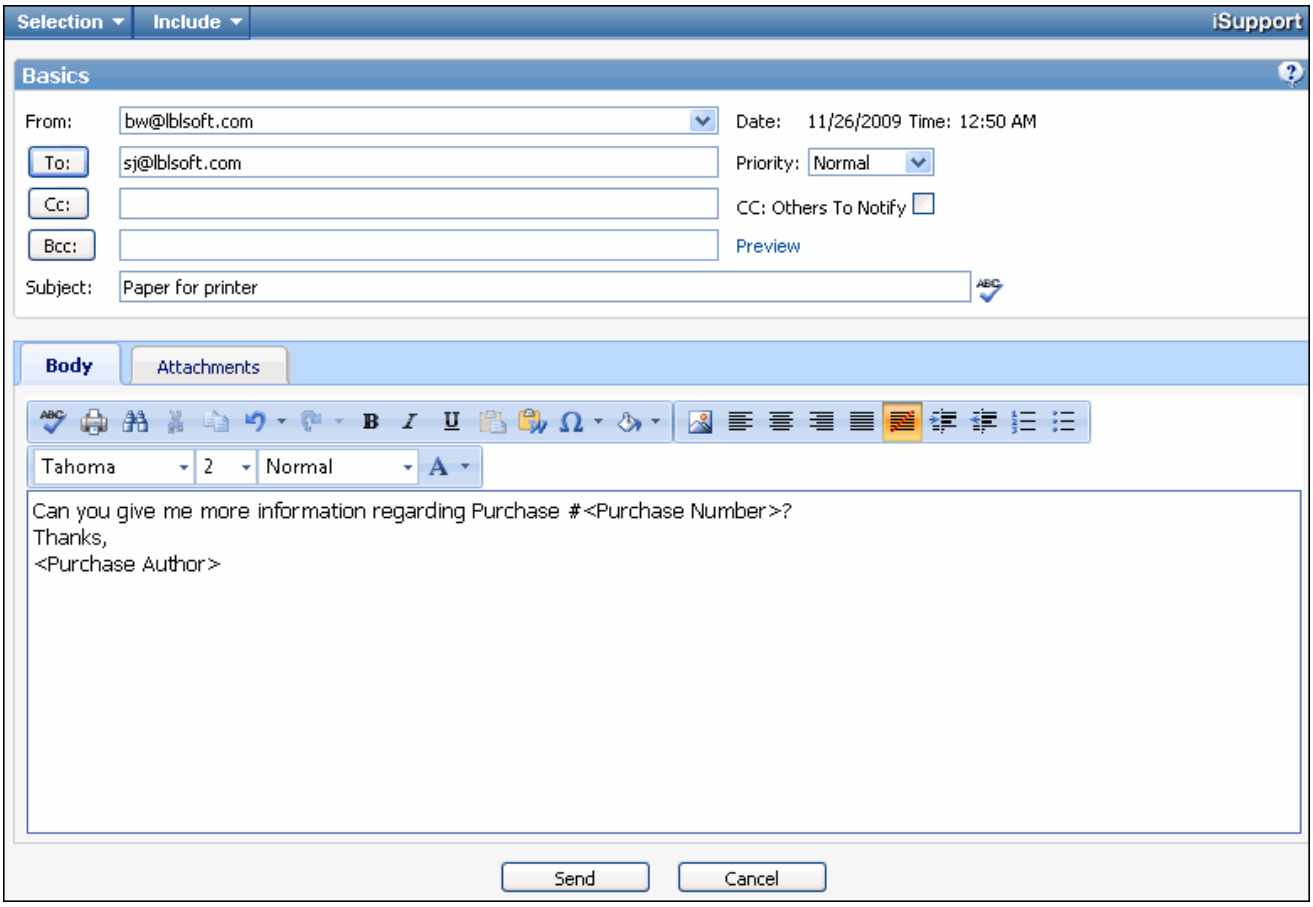
You can click the To, Cc, and Bcc buttons in the Correspondence screen to display a dialog for selecting addressees. Use care with the Select All ☐ checkbox, as it will include all names on the current page (up to 100 addressees).



If using a template, some or all of the fields may be populated. Fields (for example, <First Name>) may be included as set up during configuration. These fields will be replaced with corresponding data from the incident when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

In either a blank correspondence or correspondence created from an editable template, the Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).



The text editor toolbar will appear when you place your cursor in the Body field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 58 for more information. You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB. The icons in the toolbar will display tooltips with keyboard shortcuts.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the purchase request.

Selection iSupport

Basics

From: bw@lblsoft.com Date: 11/26/2009 Time: 12:50 AM

To: sj@lblsoft.com Priority: Normal

Cc: CC: Others To Notify

Bcc:

Subject: Paper for printer

Body Attachments

Can you give me more information regarding Purchase #9BQN42263A?
Thanks,
Barry White

Send Cancel

When finished completing fields in the Correspondence dialog, click the Send button.

After the email is sent and the purchase request is saved, notations are included on the History tab.

From the Purchase Request screen, you can select:

- Find | Correspondence | For Customer to display all correspondence sent to the customer from the Purchase Requests screen or the Customer Profile screen.
- Find | Correspondence | For Purchase Request to display all correspondence sent from the current purchase request.

Correspondence Documents

Date Time	Subject	Sender
8/19/2008 11:18:29 AM	More Information Required	bw@lblsoft.com

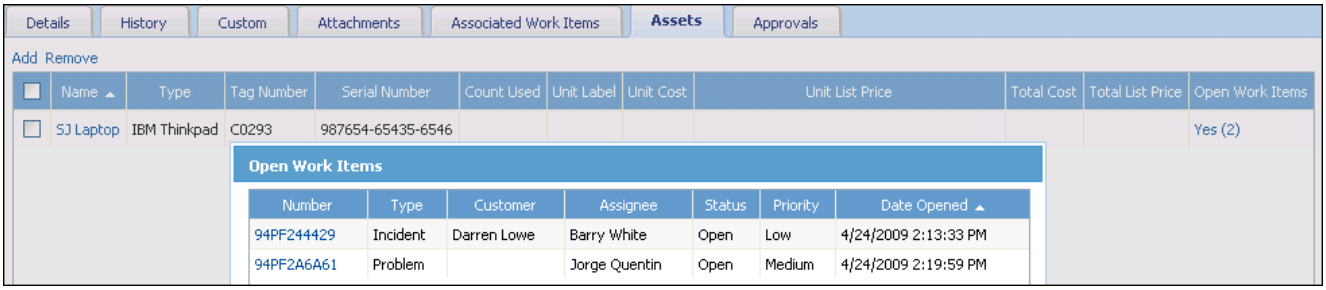
Close Window

From the Correspondence Documents dialog, you can open a document by clicking on it. System-generated correspondence is not included in this dialog.

You can also view correspondence using views on the Desktop.

Associating Assets

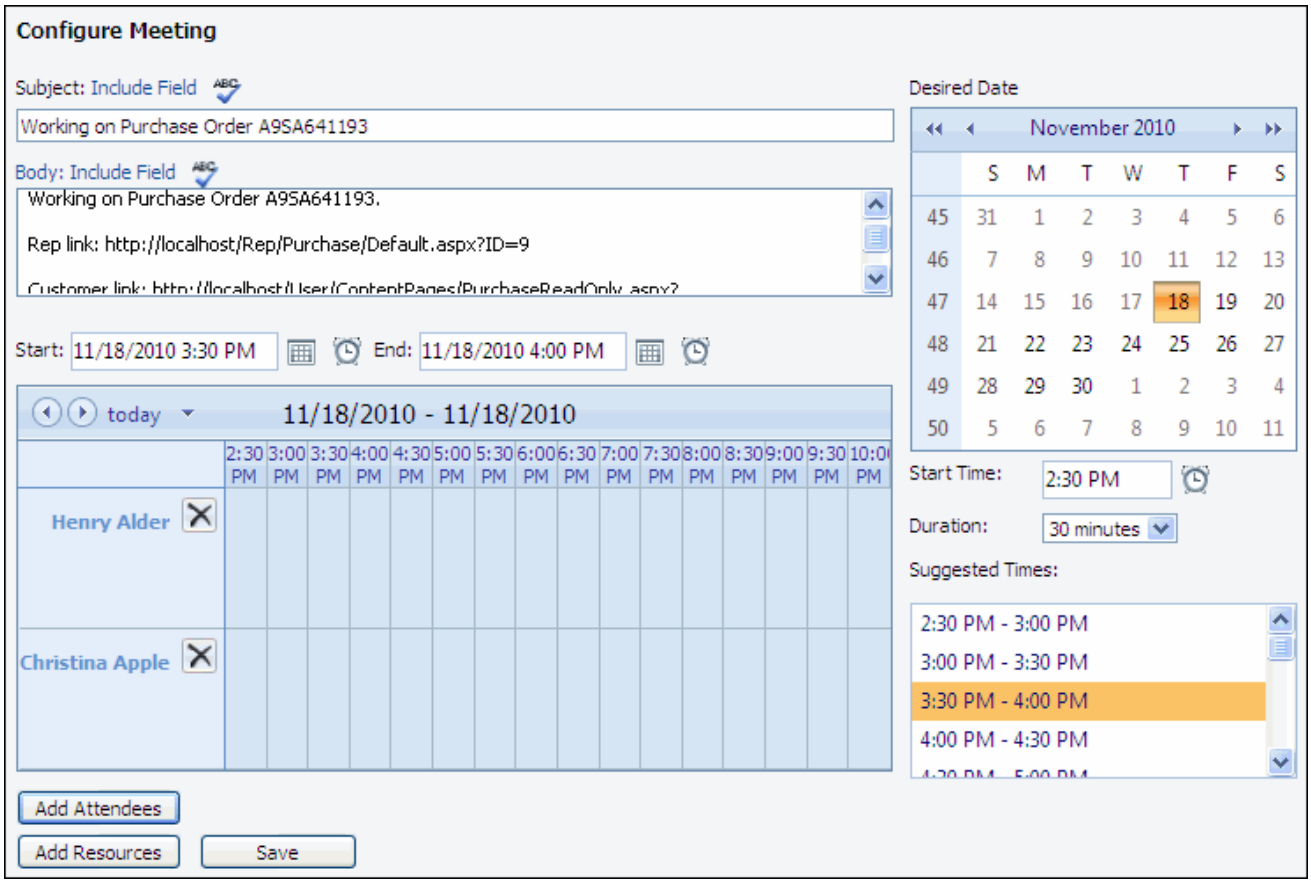
To associate an existing asset with a purchase request, click the icon, click the Asset Add link, or select Purchase | Select Asset to display the Select Asset dialog. You can display the customer's assets or all assets. Select the asset(s) related to the purchase request. If the asset has open incidents, problems, or changes associated with it, "Yes" will appear along with the number of open work items. Click the link to display a list of those items.



Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Purchase Order screen after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules

of meeting attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Purchase Order *<purchase order number>*" will be included by default in the meeting entry along with a link to the record via the Desktop and End User Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees.

After saving, the View Meetings link will appear in the Purchase Order screen for displaying meeting details.

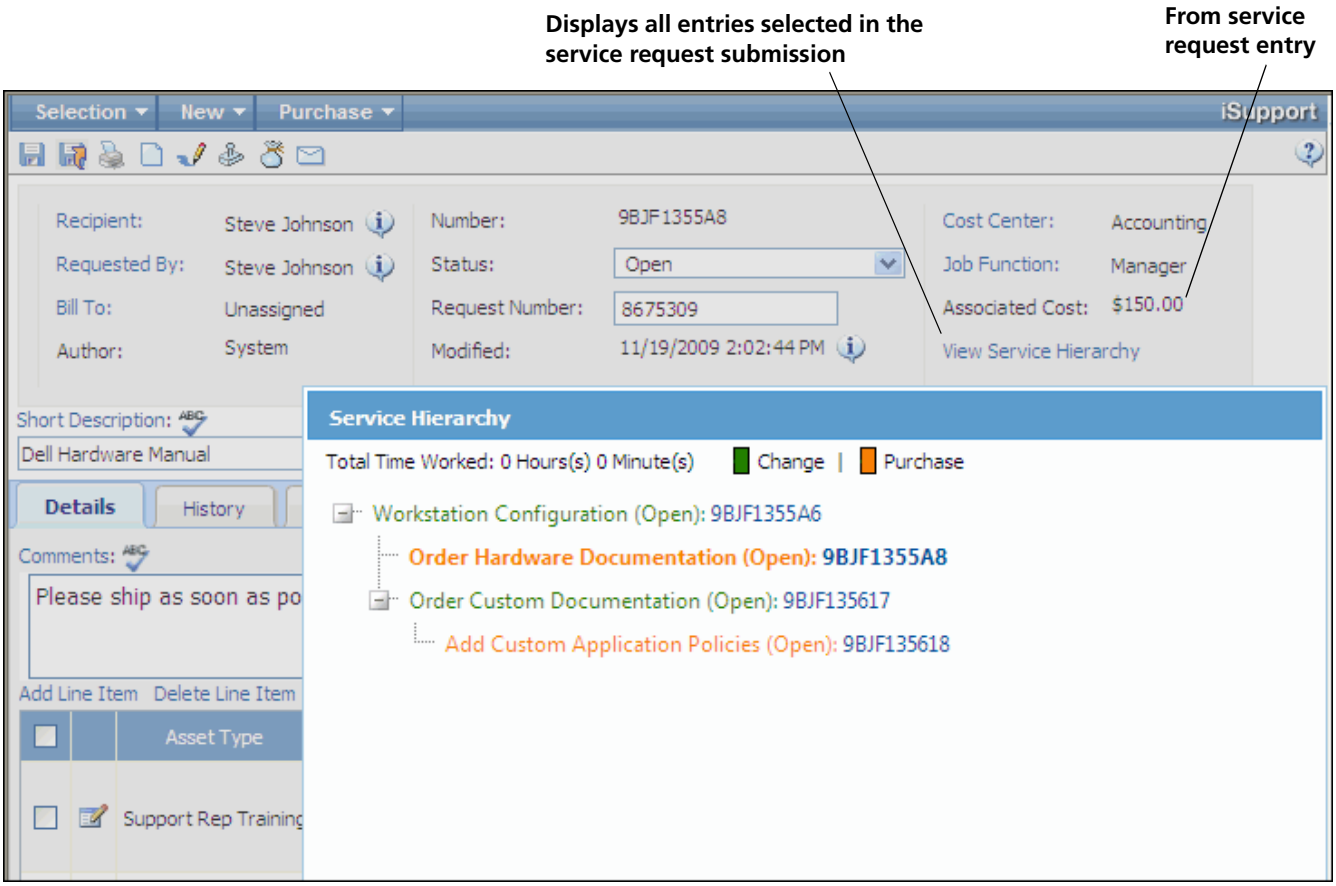
Viewing Purchase Orders Created via Service Requests

Service Catalog functionality enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the End User Desktop. Note that access to an entire service catalog or individual service catalog entries may be restricted to specific customer and support representative groups. See "Creating Service Requests" on page 413 for information on creating service requests.

Service catalogs are entered in the Configuration module; each contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

After a service catalog request is submitted by a customer, a Purchase Order or Change record will be created from the corresponding template and any configuration item specified for the service catalog entry will be associated with it. Custom fields may be completed by the customer or support representative.

Any associated cost configured for an entry will be included on the Change or Purchase Order record created from the entry. A View Service Hierarchy link will also appear for displaying all of the selected entries in the service request submission; click on a number to open a record.



Working With Approval Cycles

Approval cycles require purchase requests to be approved by designated approvers before most functions can be performed. Approval cycles are set up in the Configuration module, configured with serial or concurrent approvers, notifications, and statuses for each stage of the process. Approvers can be support representatives or customers (who specify a verdict via the End User Desktop). An approval cycle can be associated with a Customer Profile or Company record.

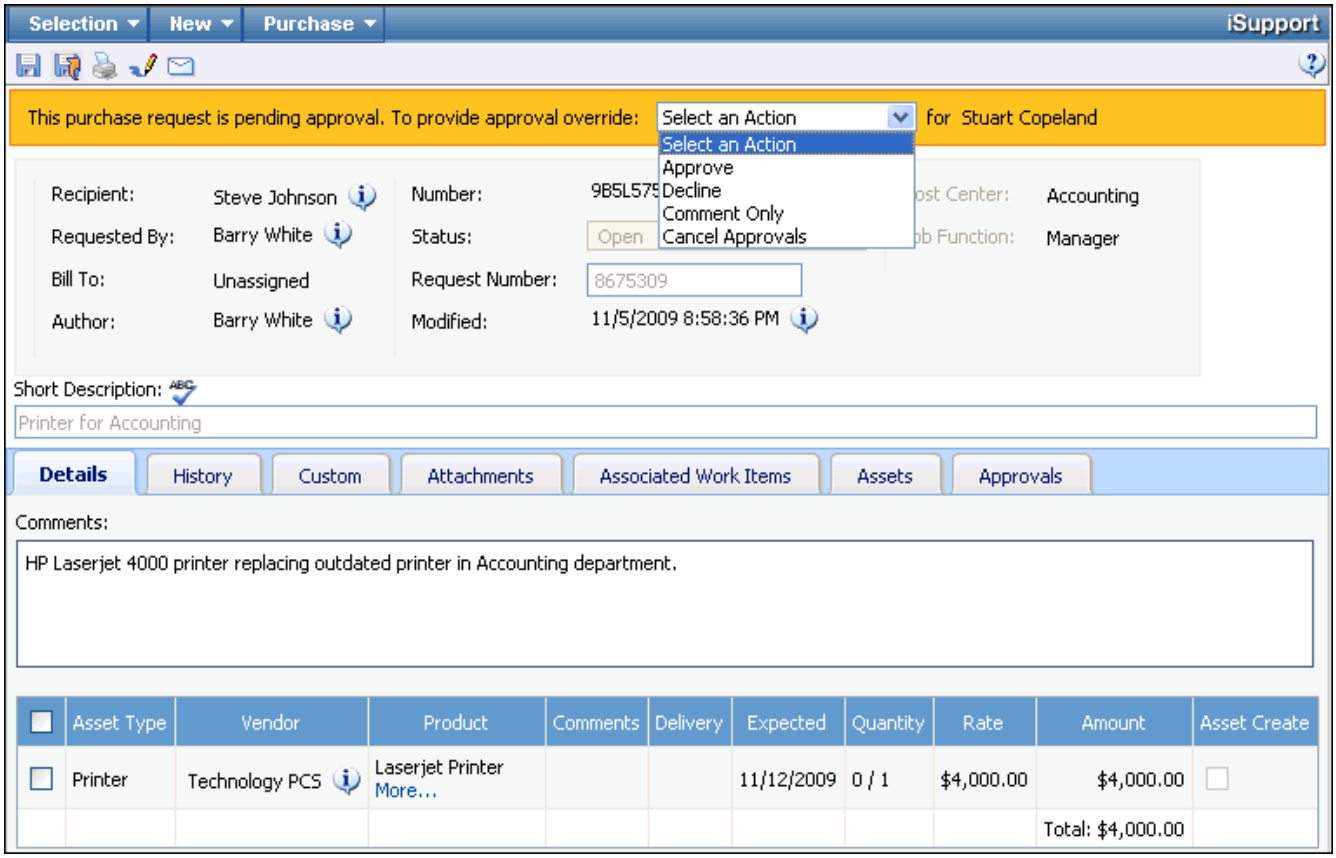
If an approval cycle results in a Decline verdict, no further cycles will apply. If an cycle is completed or cancelled, you can initiate an ad-hoc approval cycle.

Approval cycles can also be designated as available for you to initiate in the Purchase Request screen on an ad hoc basis if the purchase request is not currently pending approval.

If an approval cycle is in effect, an alert bar will appear at the top of the Purchase Request screen after the purchase request is saved and most of the fields will be disabled. (However, you can send correspondence and update work history.)

Specifying a Verdict

An action dropdown field will appear in the approval alert bar if you are the current approver in the approval cycle or if you have permission to override approvals.



Select one of the following:

- **Approve** to enable the next approver to specify a verdict or, if it is the final approval, complete the cycle.

- **Decline** if you do not wish to enable functionality on the purchase request. An entry will be required in the Comments field. One or more Decline verdicts may be needed to stop the cycle.
- **Comments Only** to enter any comments without approving, declining, or cancelling the cycle. The comments will be included in notifications sent to recipients configured for the approval cycle.
- If you have permissions, you can specify **Cancel Approvals** to cancel the cycle. An entry will be required in the Comments field; the comment will be appended to the text in the Resolution field. An approval cycle can also be cancelled by the customer assigned to the purchase request.

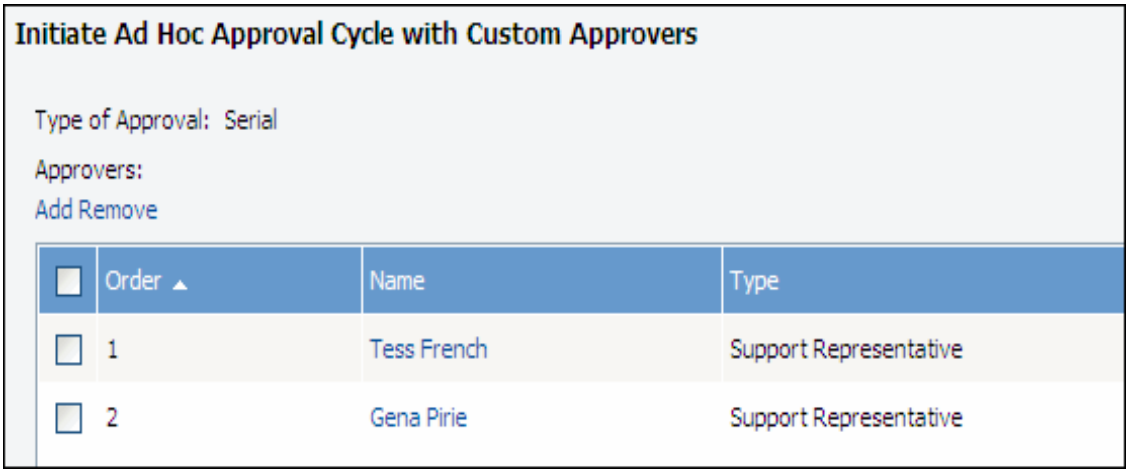
When you specify a verdict, configured notifications will be sent and the status changes to the status designated by the approval cycle if it is a cancellation, final approval, or final decline.

Initiating an Approval Cycle

To initiate an approval cycle in the Incident screen, select Incident | Initiate Ad Hoc Approval after an incident has been saved. The following dialog appears with the approval cycles designated as available for ad hoc use. The cycle will be enabled for the incident after the Initiate button is clicked.

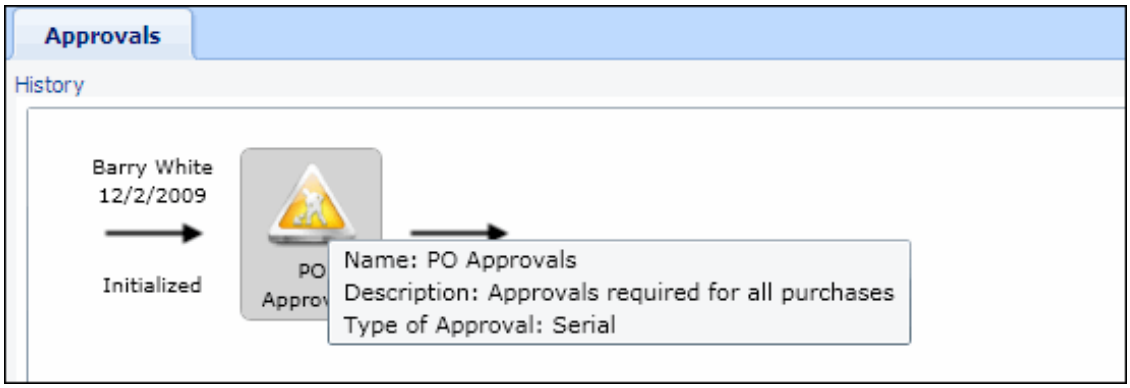
An active ad hoc approval cycle for an incident will not be cancelled when the effective SLA changes; any approvals that are defined by the new effective SLA will initiate after the ad hoc cycle is approved.

Select the Change Approvers checkbox to display the following dialog for adding or removing the approvers configured for the selected cycle.



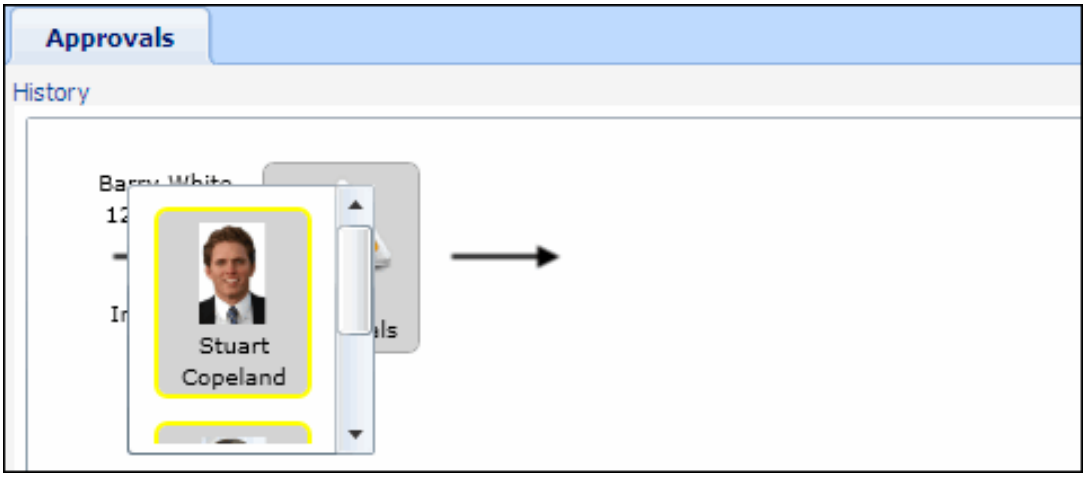
Viewing Approval History

Use the Approvals tab to view a graphic display of the approvers and status of each approval in the approval process. Note: if using a browser other than Microsoft Internet Explorer, a link appears instead of an Approvals tab for viewing approvals.

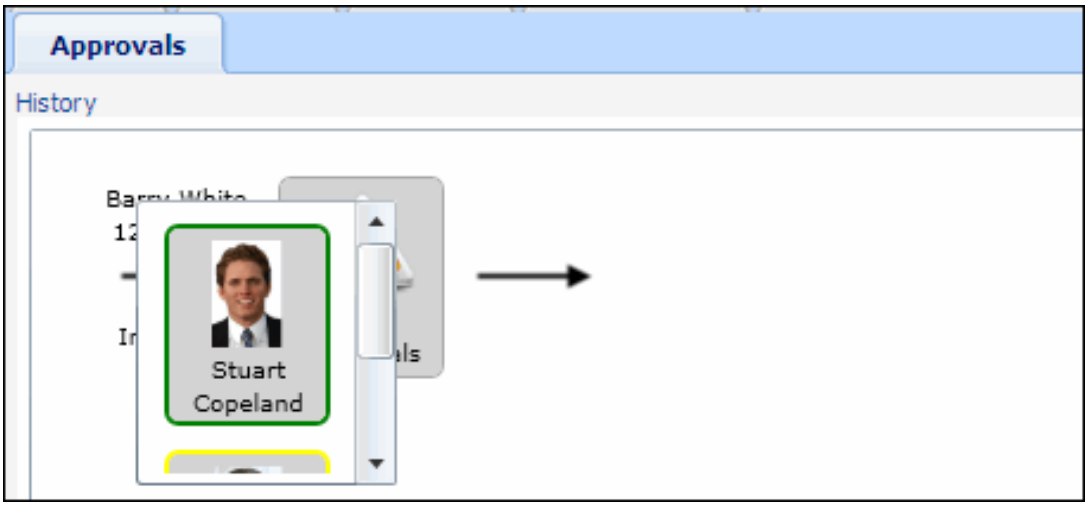


Pictures are associated with support representatives in the Support Representative Profile screen and with customers in the Customer Profile screen; if a support representative is involved in an approval cycle, the associated picture will appear when you click an icon. When an approval

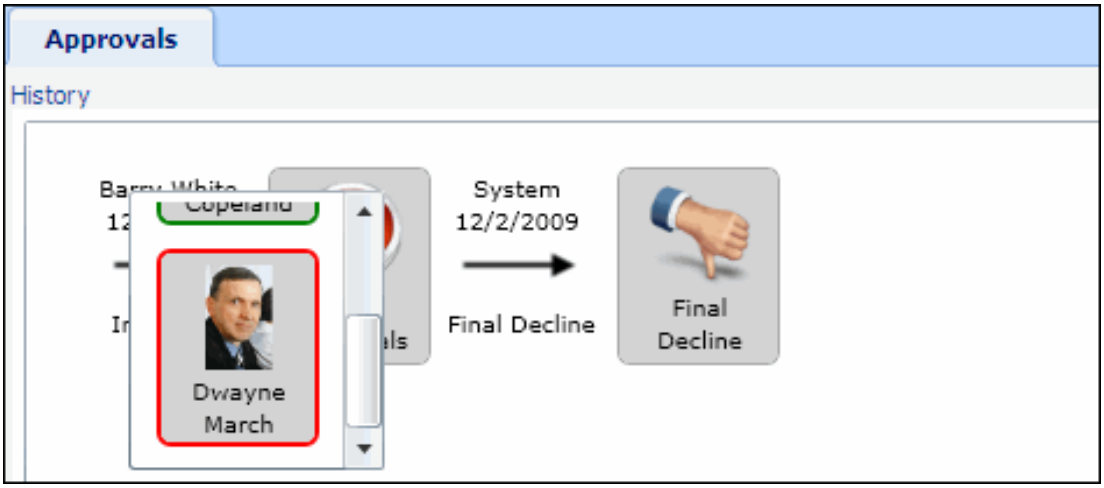
process is initiated, the picture and icon will appear as shown in the example below. The picture will be outlined in yellow if the approver is next in the approval process.



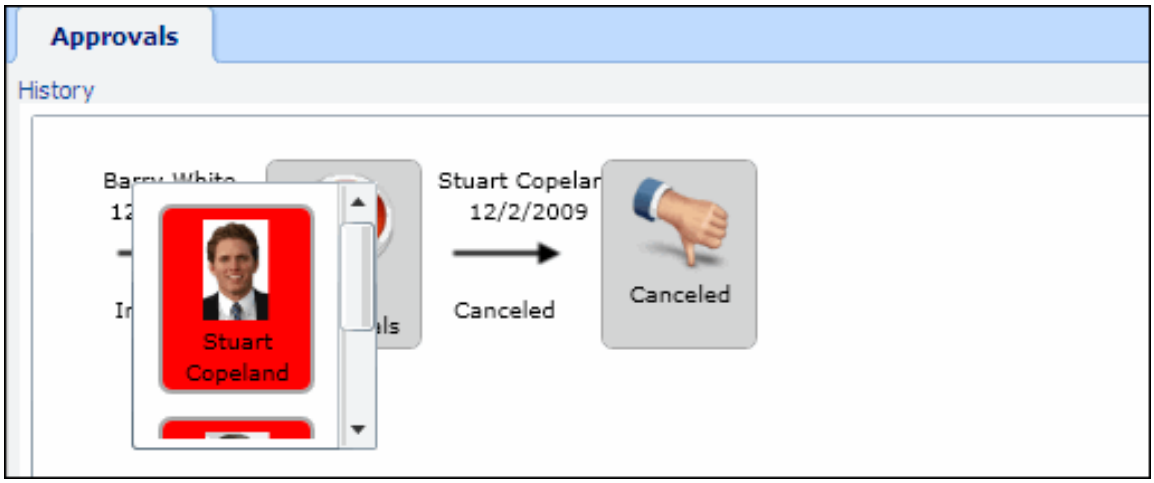
The picture will be outlined in green if the approver specifies an Approve verdict.



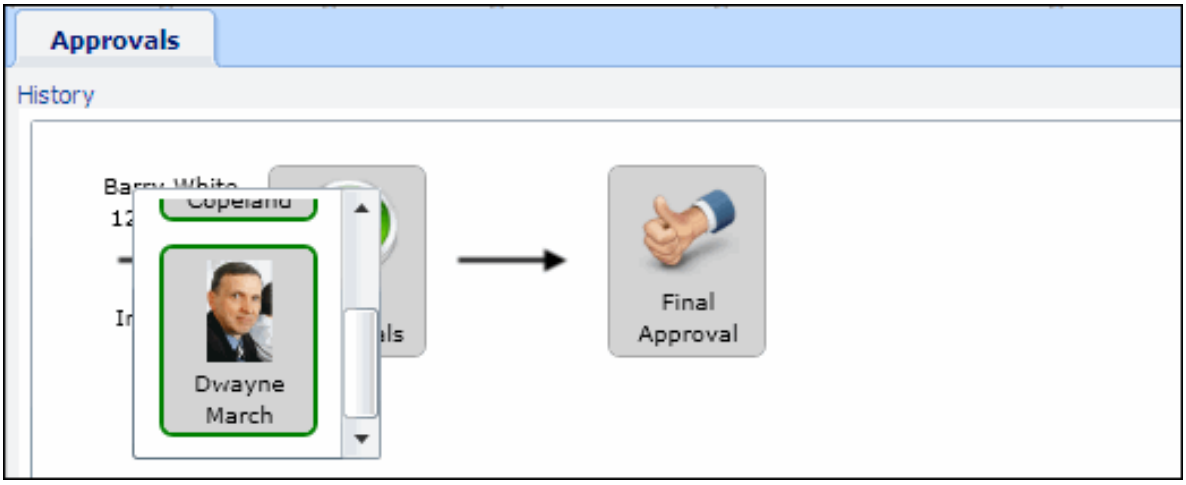
If an approver specifies a Decline verdict, the icons and pictures will appear as shown in the example below.



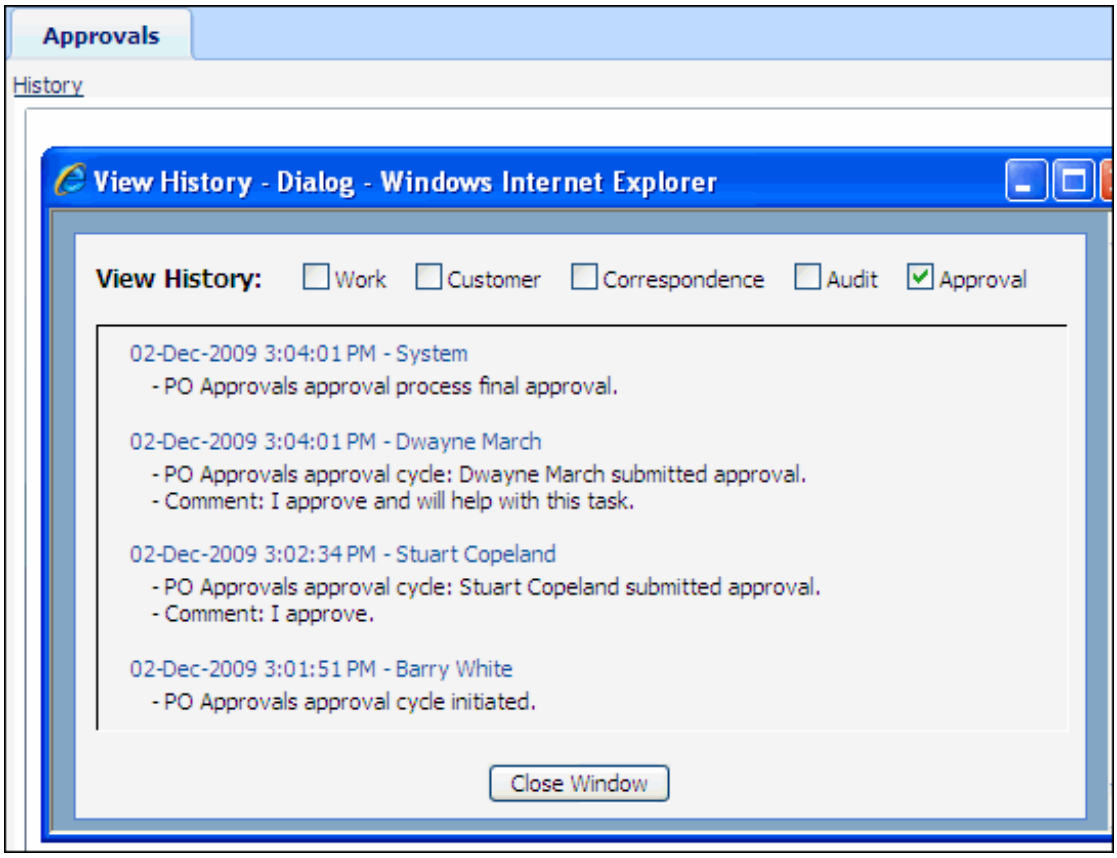
If an approver cancels the approval process, the icons and pictures will appear as shown in the example below.



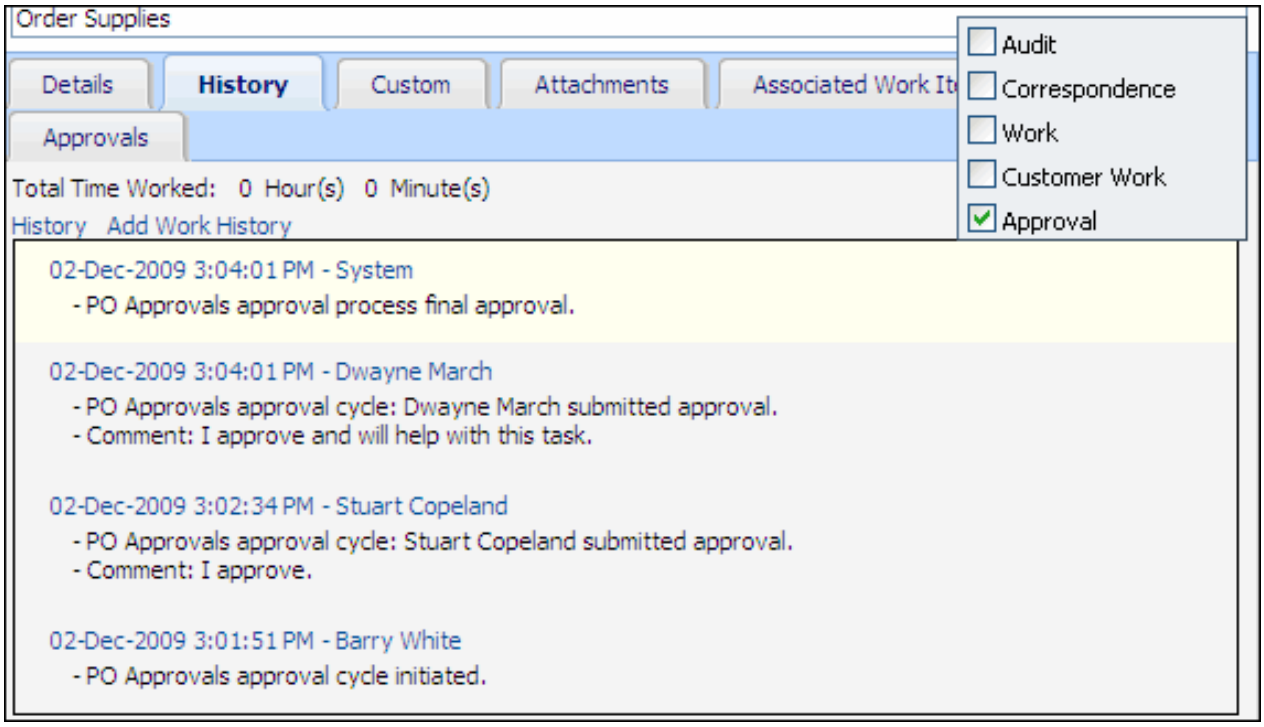
If the process results in an approval, the icons and pictures will appear as shown in the example below.



Click the History link on the Approvals tab to display all comments and approval actions.



You can also use the Approvals checkbox on the History tab to view approval actions.



Using Purchase Request Templates

Use templates for purchase requests that occur frequently. If configured, defaults may populate fields in the Purchase Request screen and End User Desktop. Templates can be configured to append or replace the text in the Short Description and/or Comments fields.

To use a purchase request template, click the icon or select Purchase | Use Purchase Request Template.

13 Working with Service Requests

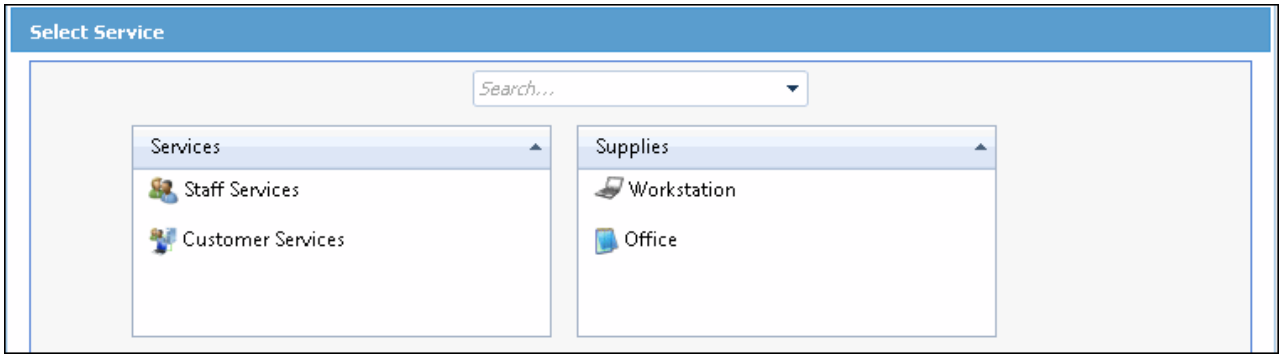
Overview

Service Catalog functionality is available if you have the Service Desk edition. It enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the End User Desktop. Note that access to a service catalog section or individual service request entries may be restricted to specific customer and support representative groups.

Service Catalog functionality is set up in the Configuration module; each section contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, links to web pages, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

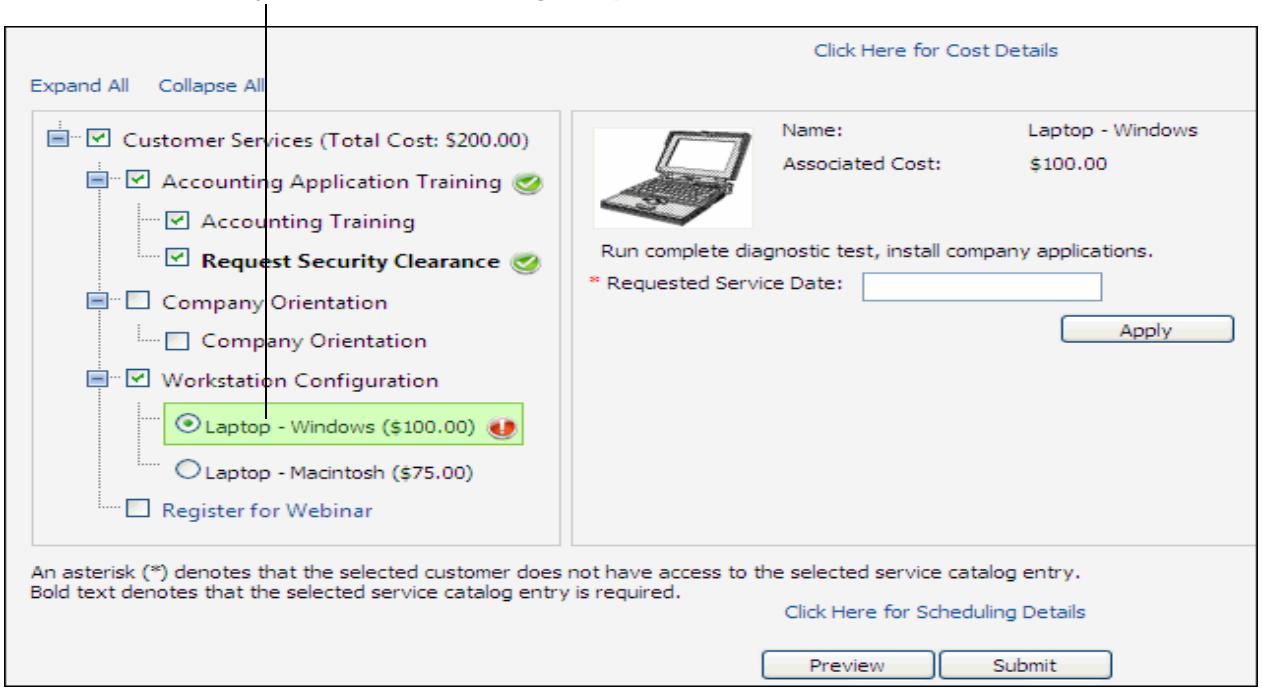
Creating Service Requests

The catalog will appear as follows. It can be accessed via the Service Request option on the Desktop action menu or the Service Catalog option on the End User Desktop. A link to a specific service catalog section can also be configured for the End User Desktop.



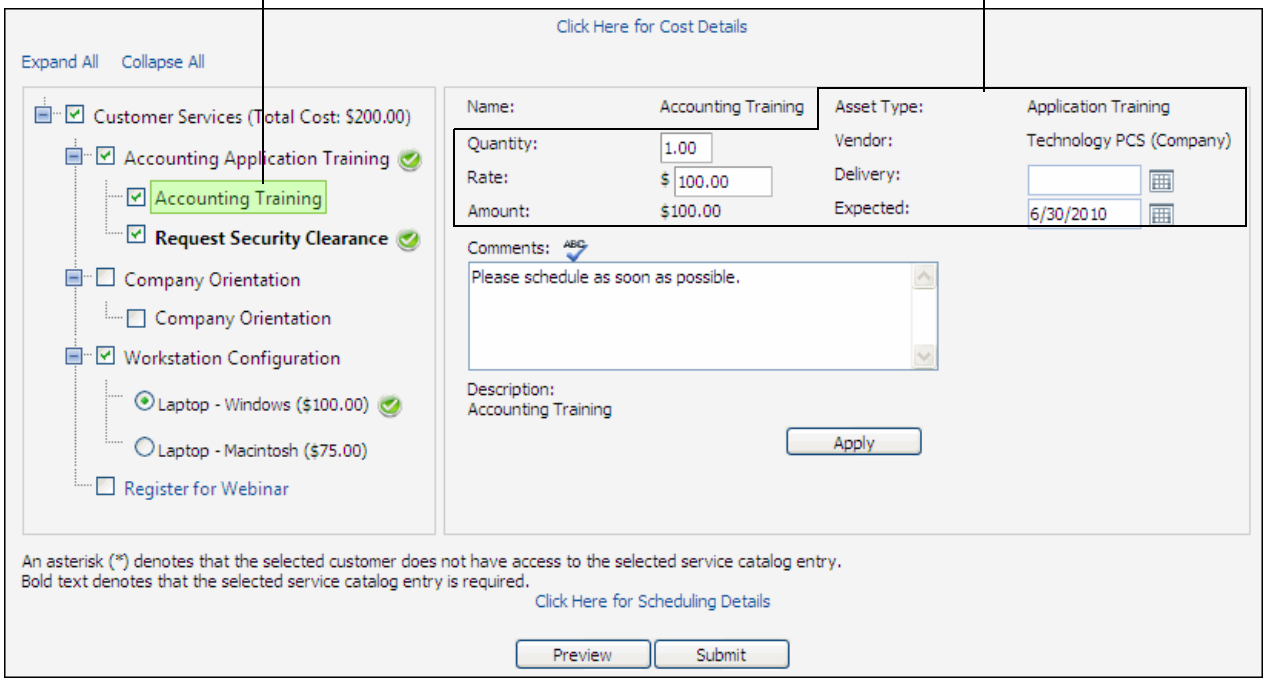
The service request section will appear as follows. Note that display of the dollar amount next to an entry is controlled by the Can View Service Cost field in the customer's Profile record. The Total Cost amount includes the cost of all selections (including line items from the purchase template). If a green check mark icon appears next to an entry, you can click it to view and complete any configured Change or Purchasing custom fields. If an entry includes the Custom Fields Not Completed icon, the custom fields are required in order to submit the request.

Entry associated with a Change template

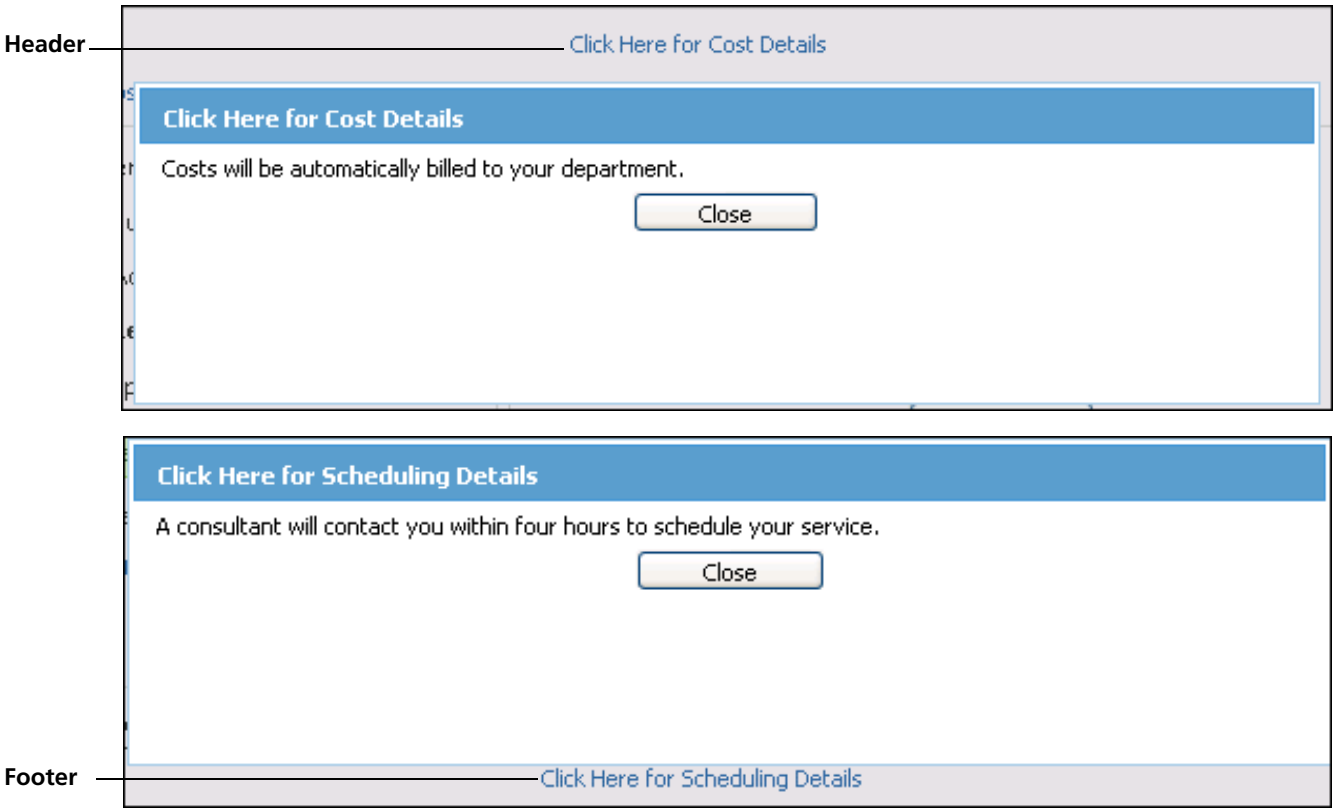


Entry associated with Purchase template

Line item from Purchase template



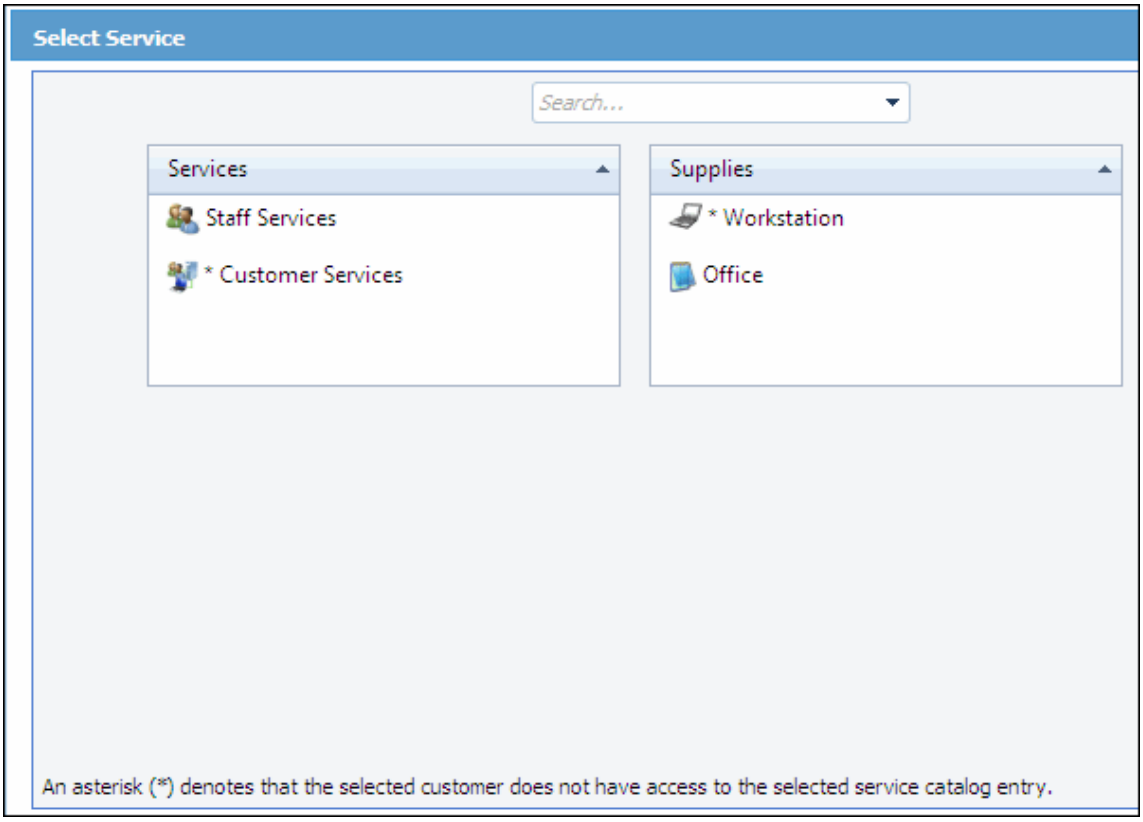
The links at the top and bottom of the screen display a dialog with any informational details you wish to convey.



Group Access

Group access restrictions can be configured for a section of the service catalog or for a request entry. Access can be restricted to members of both support representative and customer groups.

- If a support representative is not a member of the group(s) that have access to the section or entry, the section or entry will not appear to the support representative in the Service Catalog and Service Catalog Section interfaces accessed via the iSupport Desktop.
- If a customer is not a member of the customer group(s) that have access to the section or entry, the section or entry will not appear to the customer in the Service Catalog and Service Catalog Section interfaces on the End User Desktop. These entries will be marked with an asterisk on the Service Catalog and Service Request interfaces accessed by support representatives via the iSupport Desktop.



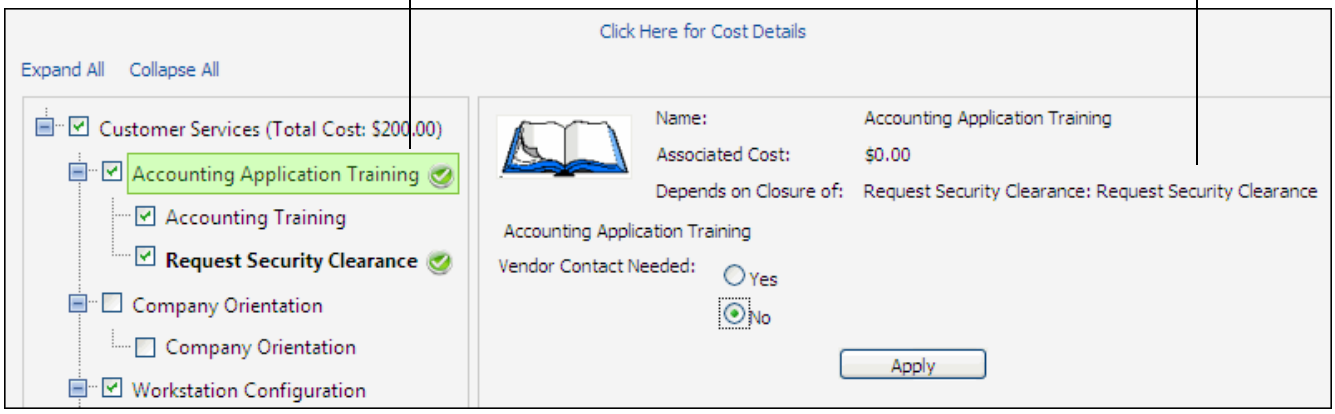
Dependencies

If a dependency is configured for a service request entry, a lower level entry must be selected in order to select the current entry in the Service Request screen. The record created from the selected lower level dependency entry must be closed in order for the record to be created from the upper level entry. The dependency will appear as shown below in the Service Request screen:

Service Request Screen

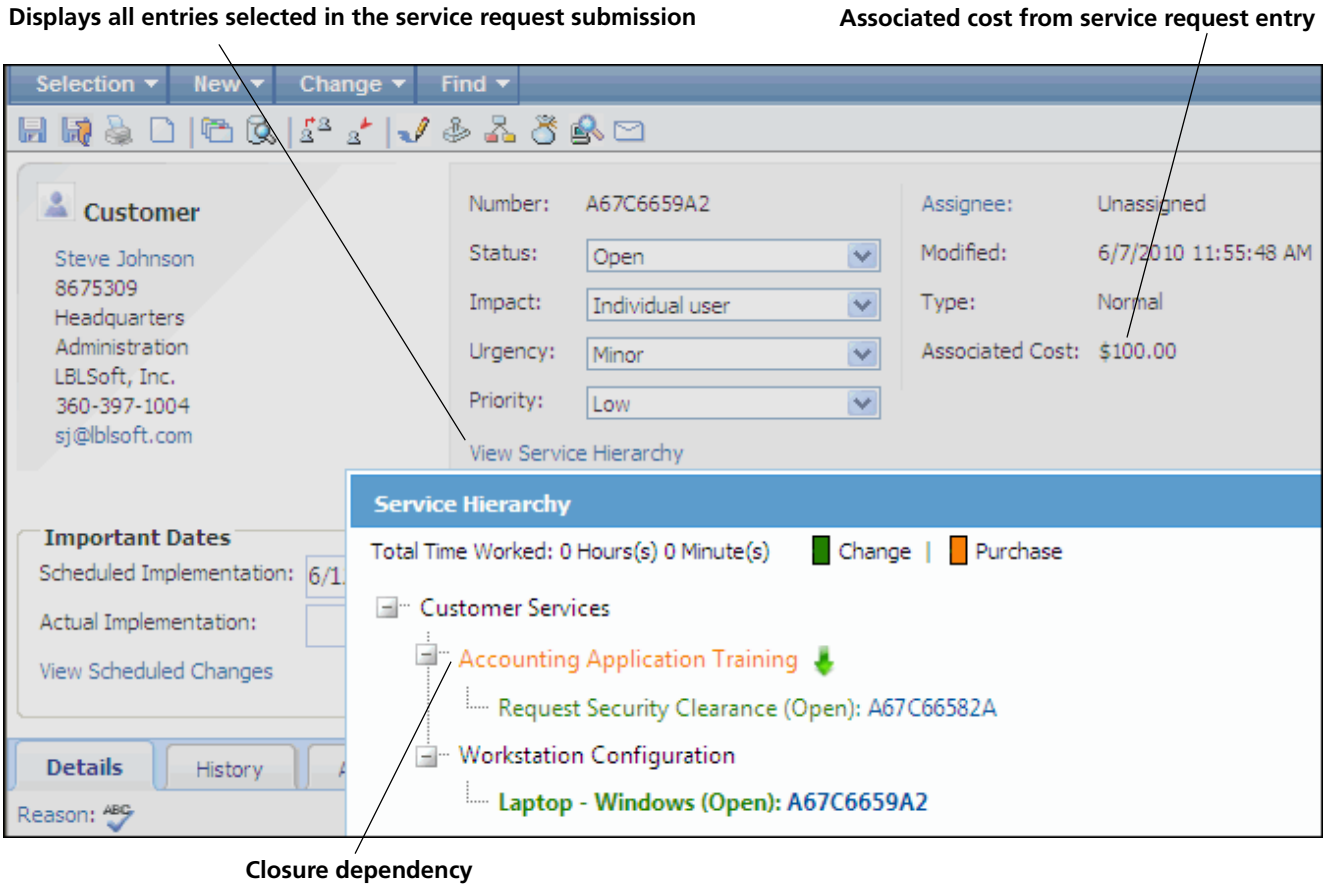
This purchase request will not be created until the Change record created from its lower level dependency (Request Security Clearance) is closed

This change must be closed in order for the Accounting Application Training purchase request to be created



Viewing Records Created via Service Requests

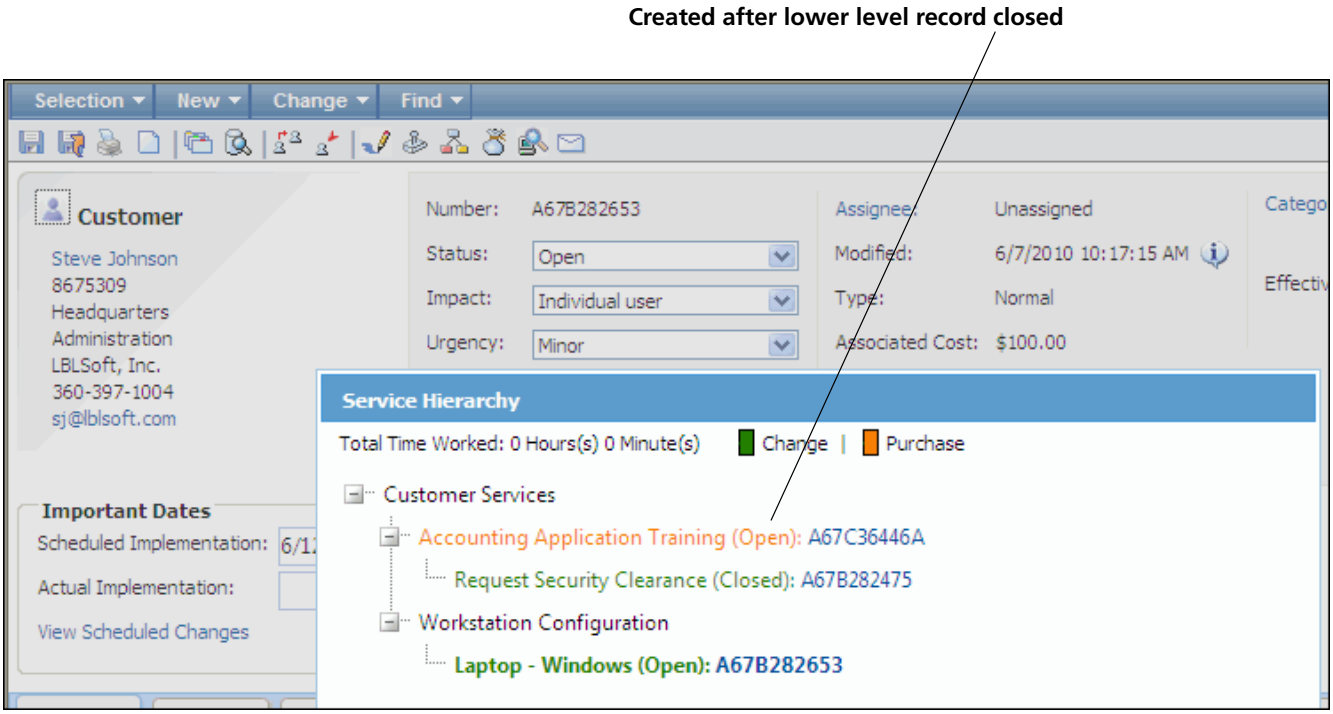
After a service catalog request is submitted by a customer, a Purchase Order or Change record will be created from the corresponding template and any configuration item specified for the service catalog entry will be associated with it. A View Service Hierarchy link will appear in the newly created Change and Purchase records for displaying all of the selected entries in the submission. Click on a number to open a record.



Items in orange indicate purchase requests; items in green indicate Change records. Any associated cost configured for an entry will be included on the Change or Purchase Order record created from the entry.

The green down arrow icon indicates a closure dependency; the lower level entry must be closed in order for the current entry to be created. A placeholder will appear for an entry with a closure dependency on an open lower level entry. The record will be created from the template placeholder when the lower level record is closed.

The hierarchy will appear as follows when the lower level record is closed.



14 Tracking Software Licenses

Overview

iSupport's License Management functionality enables you to track instances of one or more software titles against a specified condition and quantity. You'll set up a profile that includes a condition (actual quantity is not or is greater than or less than a specified quantity), the software titles, and notification to be sent if the condition is met.

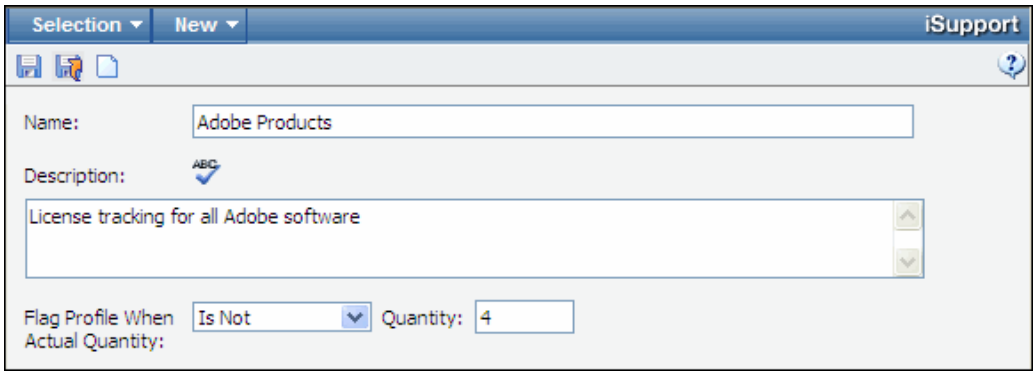
The License Management agent scans all inventory scans and searches for instances of the software titles specified in Software License Profile records. It compares the actual quantities found against the conditions, flags the profiles that meet the conditions, and updates the profiles with the actual quantities. Notifications are sent if configured. The *iSupport Administrator's Guide* contains more information about the License Management agent.

Creating a License Profile

To create a license profile, select License Management | Create Software License Profile on the Desktop action menu.

Entering Details

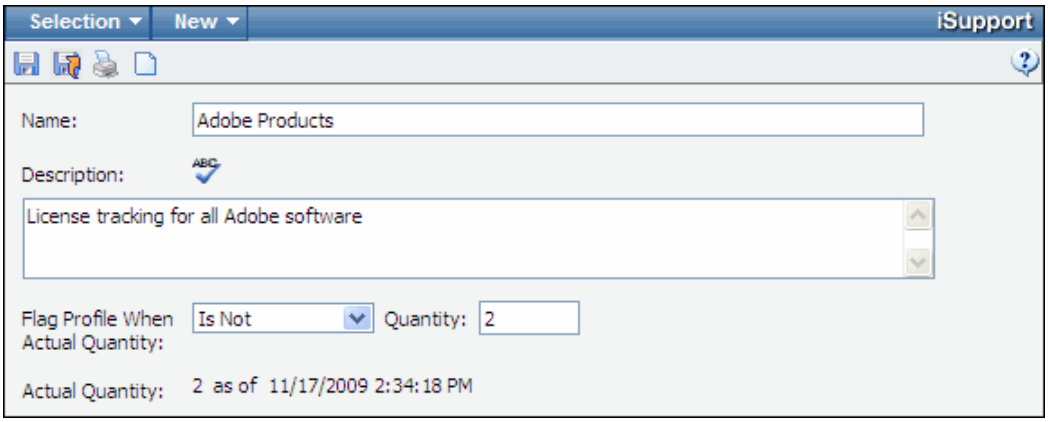
Use the upper portion of the screen to enter a name and description for the profile and specify the condition for flagging software licenses.



Field	Description
Name	Enter a name for the profile.

Field	Description
Description	Enter a description of the profile. This description will appear in License Management views on the Desktop.
Flag Profile When Actual Quantity	Select: ■ Is Not to flag the profile if the actual number of software application instances is not equal to the number specified in the Quantity field. ■ Is Greater Than to flag the profile if the actual number of software application instances is greater the number specified in the Quantity field. ■ Is Less Than to flag the profile if the actual number of software application instances is less than the number specified in the Quantity field.
Quantity	Enter the total number of software application instances to compare against the actual number of software application instances detected.

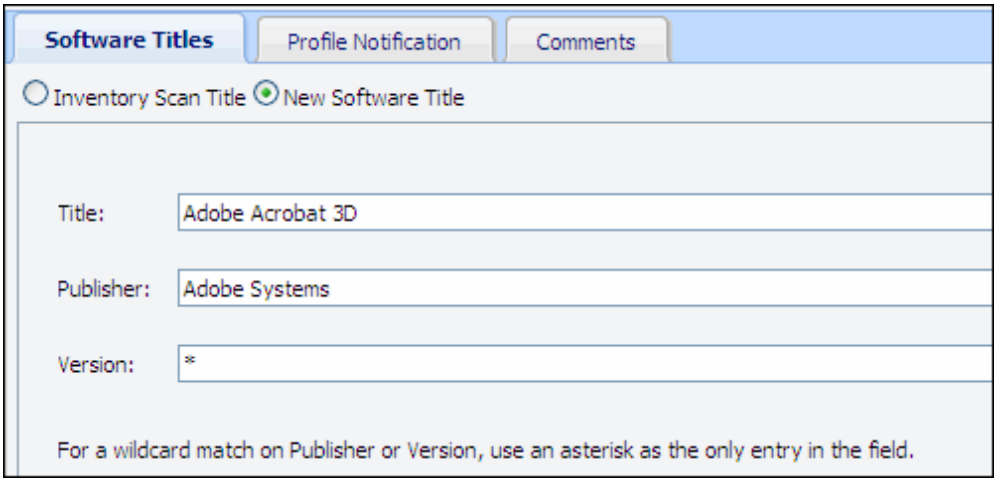
The actual quantity appears below the condition when the profile is saved; it is updated every time the License Management agent runs and the profile is saved.



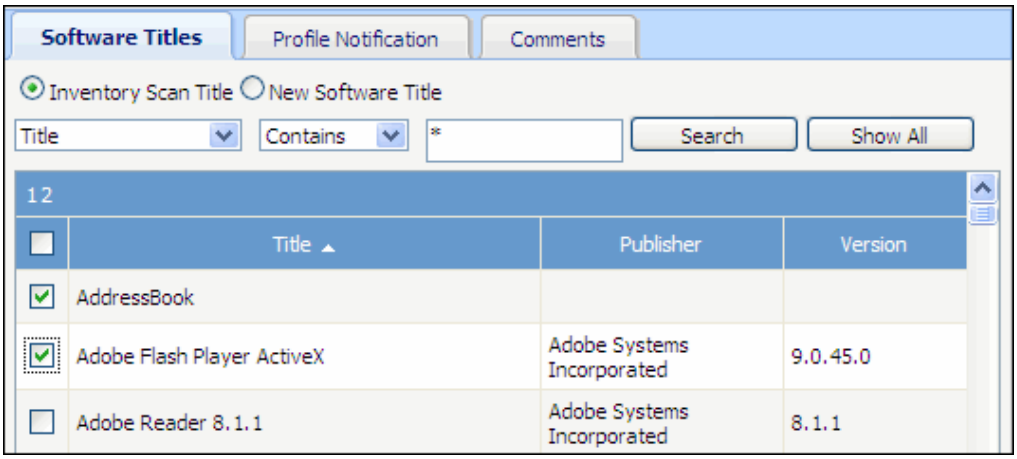
Adding Software Titles

You can add software titles by entering the title information manually or by selecting titles detected from a compilation of all saved inventory scans. Enter the title information manually by selecting the New Software Title radio button as shown below. You can enter an asterisk (*) as a

wildcard in the Publisher or Version field to flag all instances of the publisher or version (respectively) for the title; ensure that it is the only entry in the field.

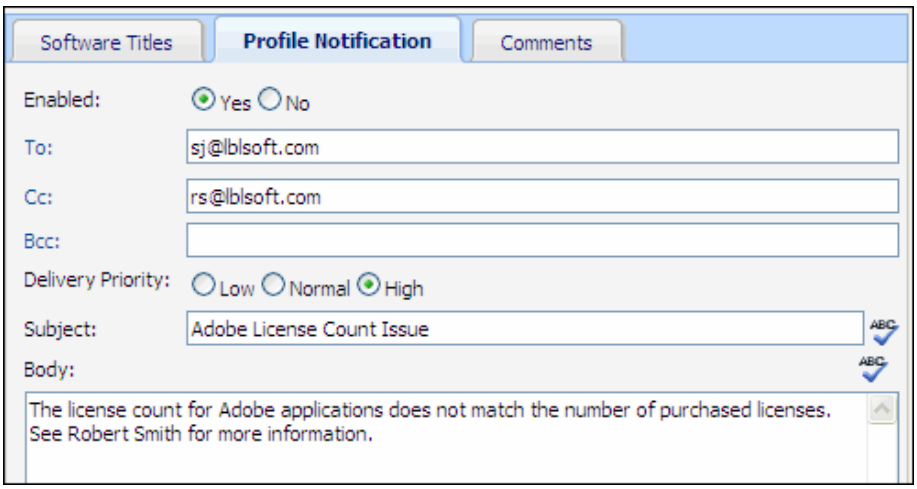


Use the Inventory Scan Title radio button to display the software titles detected from all saved inventory scans. Select the titles to be included in the search and click Add.



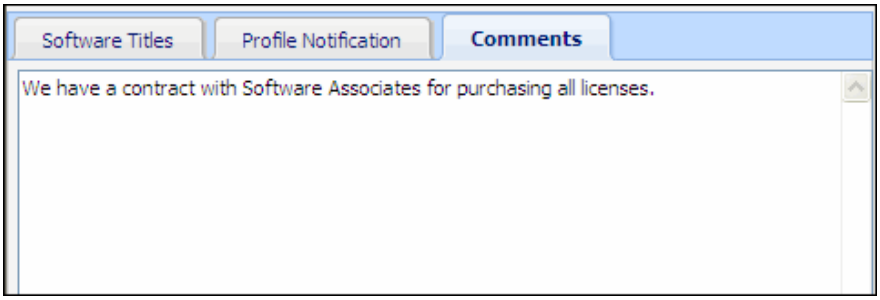
Setting Up the Flagged Profile Notification

Complete the Flagged Profile Notification tab to be sent when a profile is flagged because the condition specified in the Details section is met. Notifications are sent according to the schedule of the License Management agent.



Entering Comments

Use the Comments tab to enter any notes regarding the profile.



Saving a License Profile

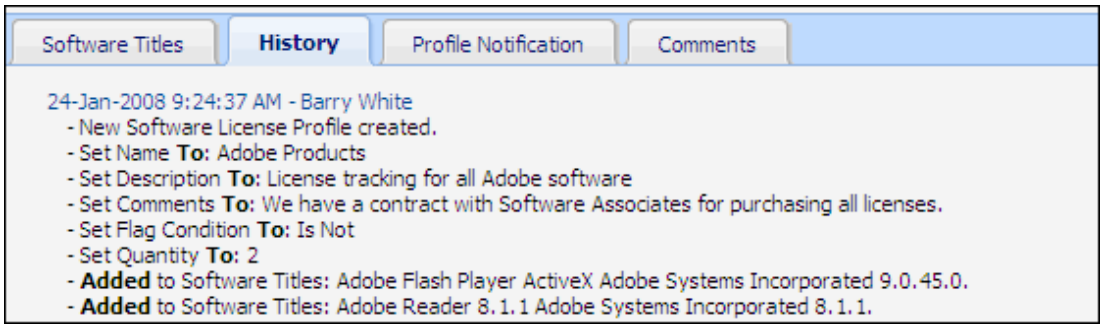
To save a License Profile record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save or Save and Close Window icon.

The actual quantity appears in the Details section when the profile is saved; it is updated every time the License Management agent runs and the profile is saved.

Viewing Audit History

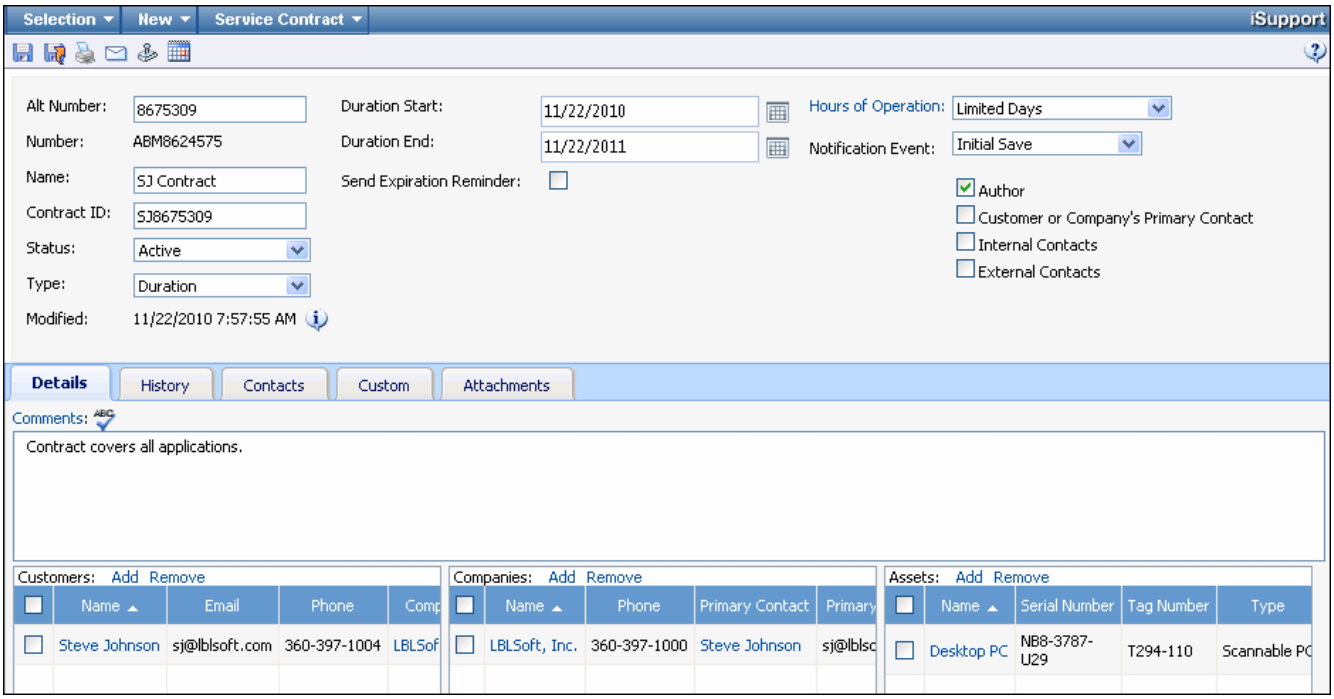
After you save a license profile, entries appear on the Audit History tab. This tab includes a notation of every action performed on the record with the date, time, and author stamp.



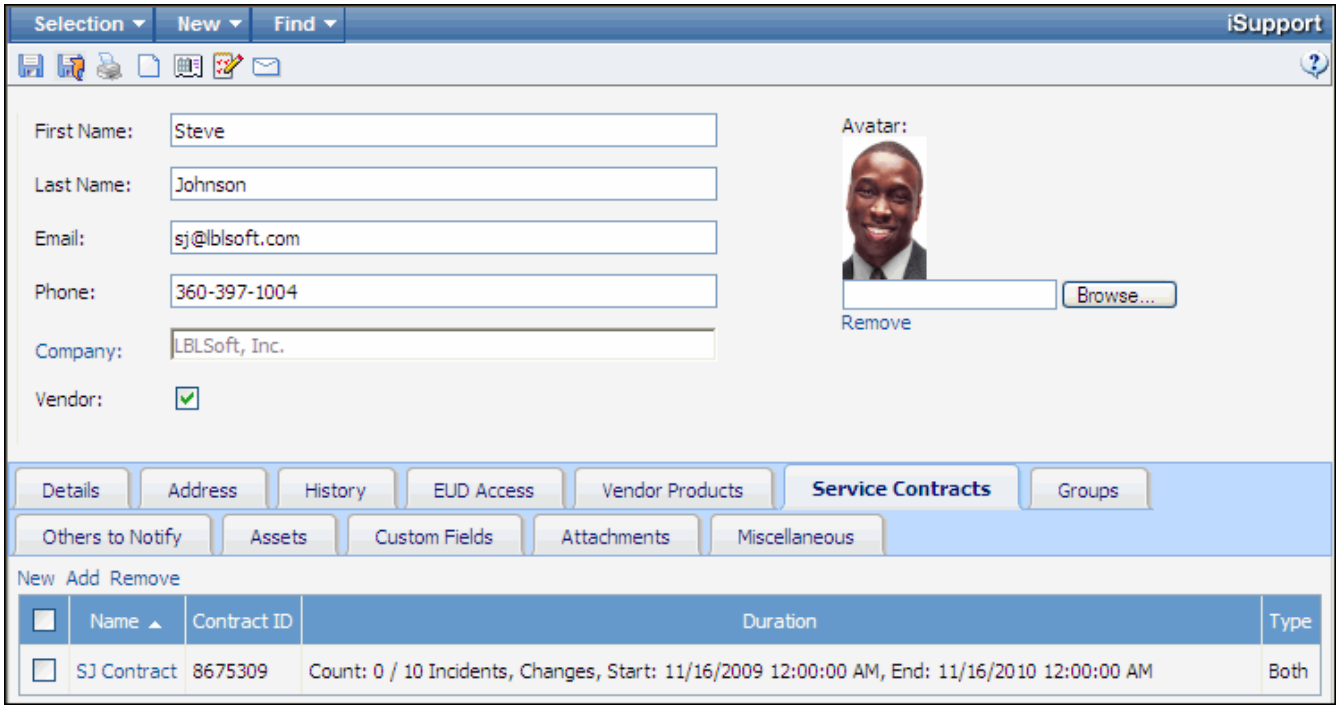
15 Working with Service Contracts

Overview

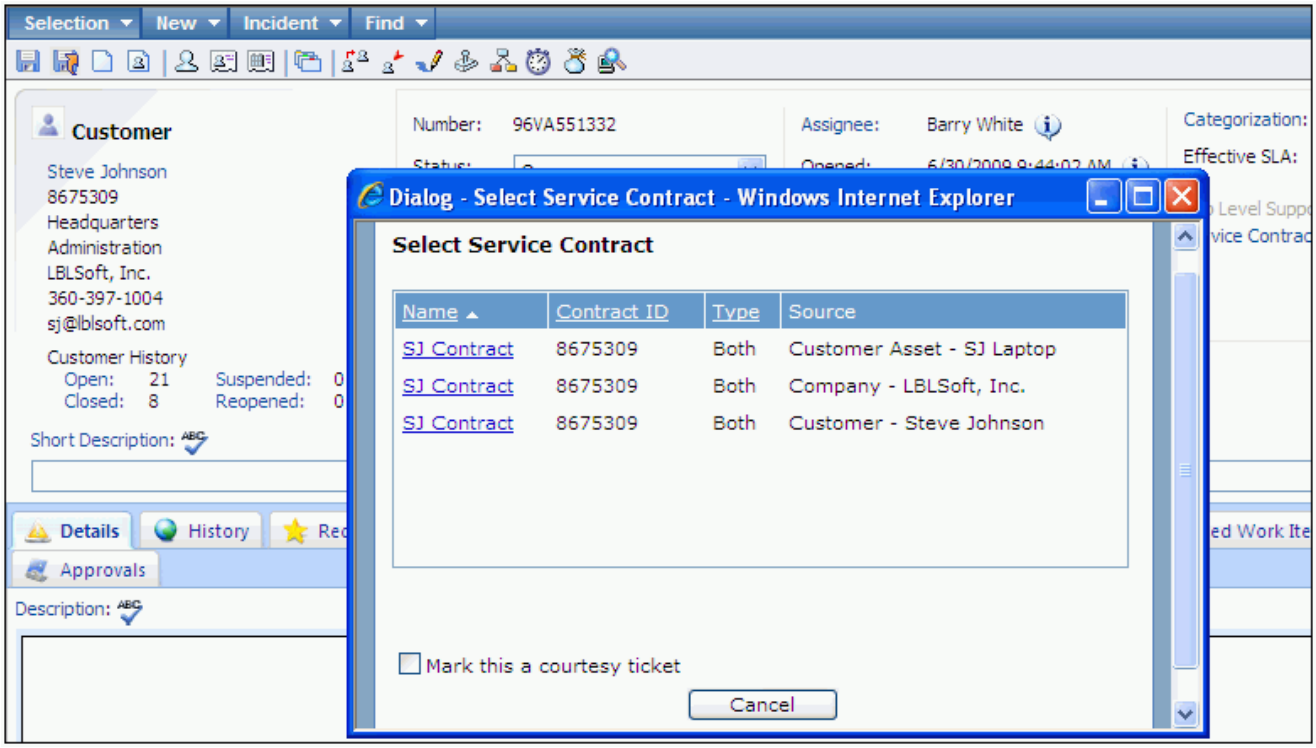
Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. You can set up contracts based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (timeframe in days), or a combination (limiting the number of incidents and/or changes within a specified daily timeframe). You can assign a service contract to one or more customers, companies, or assets.



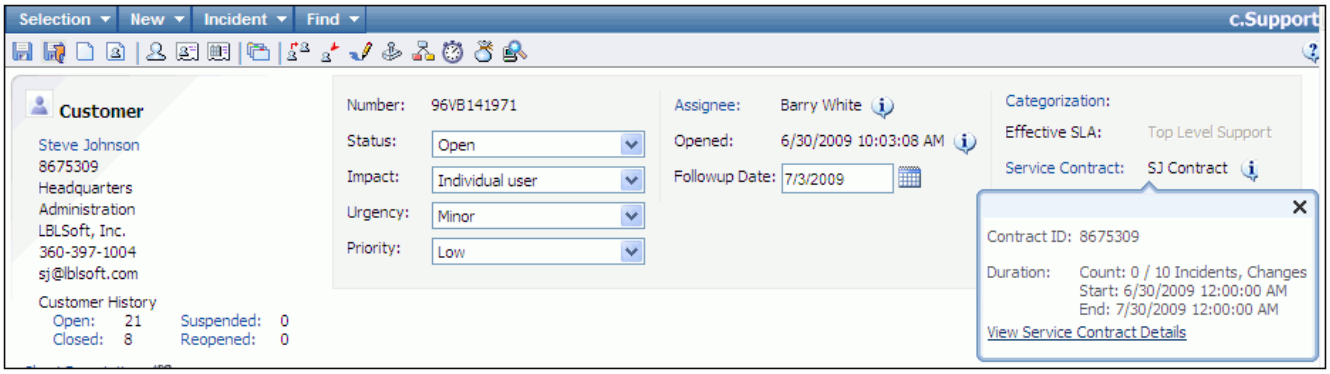
You can also assign, or create a service contract using the Service Contracts tab in the Customer Profile, Asset, and Company screens.



A prompt will appear in the Incident and Change screens if a valid service contract is associated with the customer, customer's company, and/or any assets owned by the customer.



The name of the contract appears after a service contract is selected; click the Details icon to display the contract ID and duration. You can click the View Service Contract Details link to display contract in the Service Contract screen.



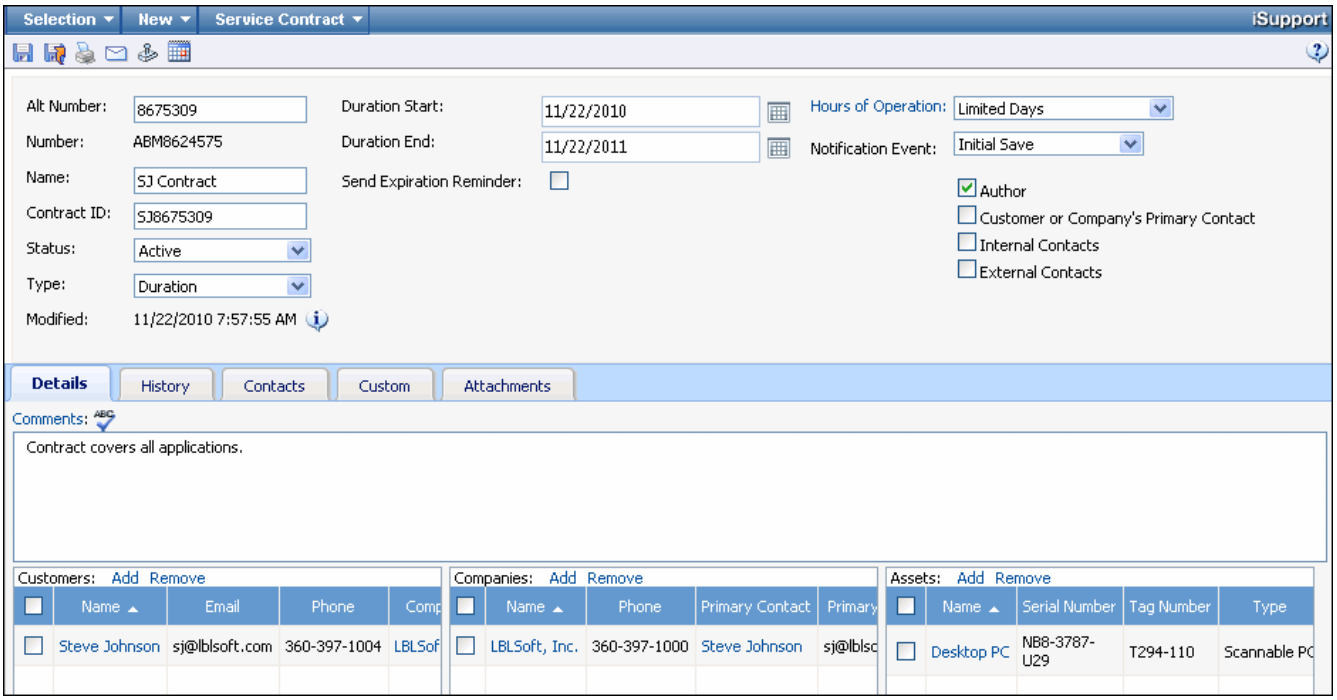
The *iSupport Administrator's Guide* contains information on setting up all Service Contract functionality.

Functionality may not be accessible if disabled or disallowed due to permissions set during configuration. This chapter contains information on **all** Service Contract functionality.

Creating a Service Contract

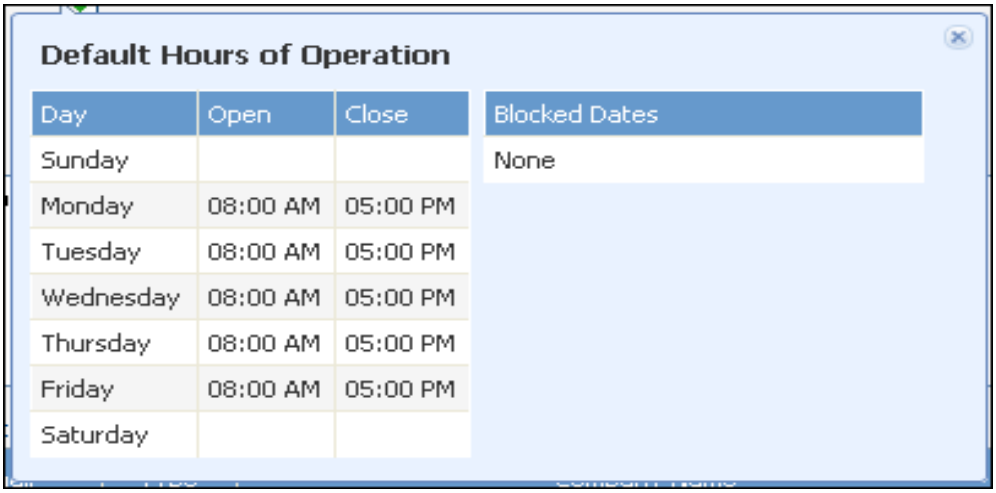
You can access the Service Contract entry screen by clicking the Service Contract option on the Desktop action menu or by clicking the New link in the Service Contracts section in the Customer Profile, Company, and Asset screens.

Use the upper portion of the screen to set up the basis of the contract, notifications, and customers, companies, and assets to assign to the contract.



Field	Description
<custom number label> ("Alt Number" in this example)	A custom number field may be configured; the number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. If configured, the field may be read-only after you enter the number and save the record.
Number	A number automatically generated by iSupport appears in this field.
Name	Enter a name for the service contract. This name will display for selection in the Incident or Change screen.
Contract ID	Enter an identifier for the contract. Your entry can include letters, numbers, and symbols.
Status	Select the contract status: ■ Active - the contract is available for use with incidents and changes. ■ Inactive - the contract is not available for use with incidents and changes. ■ Suspended - the contract is not available for use with incidents and changes. ■ Expired - Select this status to make the contract settings read-only. A service contract can be assigned this status automatically via the Service Contract agent; it checks all service contracts for total counts and/or end dates/times and if the specified total count and/or end date/time is reached, the agent changes the status to an Expired status.

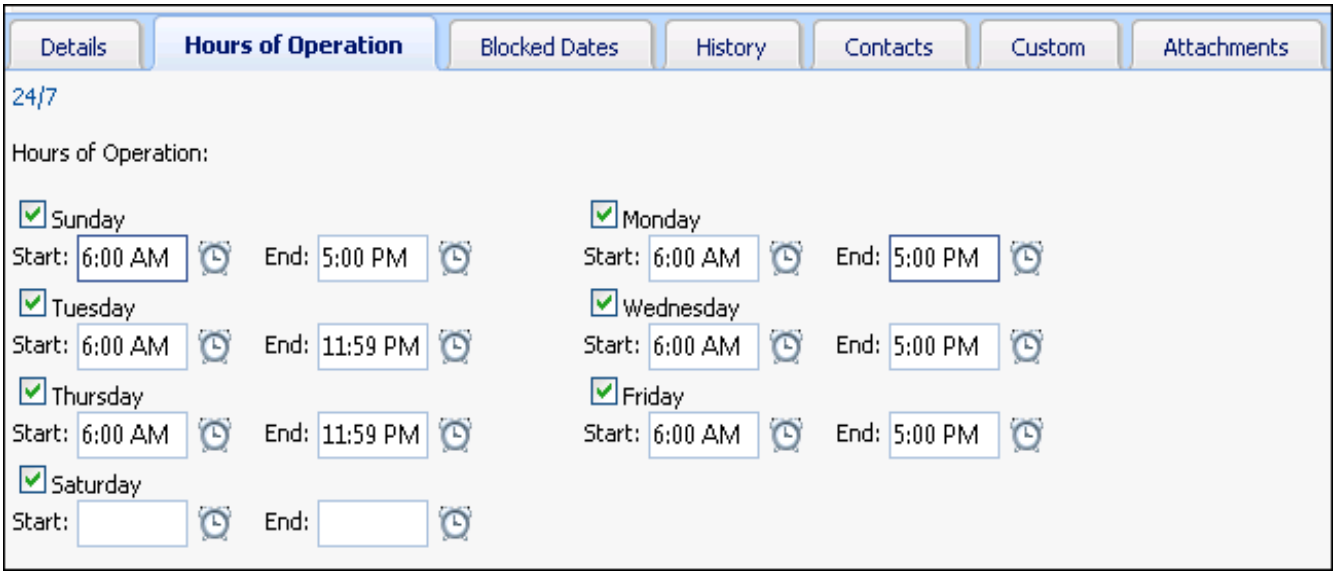
Field	Description
Type	Select the basis for the contract: ■ Duration - a specified timeframe (in days) ■ Count - a specified number of hours or work items (incidents and/or changes) ■ Both - a specified number of incidents and/or changes within a specified daily timeframe
Used	This field appears if Count is selected in the Type field; it displays the number of incidents/changes and/or hours that have been counted against the contract. You can change this number if applicable.
Duration Count	Enter the maximum number of hours or incidents and changes allowed under the contract. Hours or incidents and/or changes are counted against a contract when the record is initially saved.
Duration Count Type	Select one of the following: ■ Hours to base the contract on the number of hours entered for time worked on incidents and changes. ■ Work Items to base the contract on the number of incidents and/or changes created for the associated customer, asset, or company. Then select Incidents, Changes, or both.
Duration Start	Enter the beginning date in the timeframe in which incidents and/or changes are counted against the contract.
Duration End	Enter the end date in the timeframe in which incidents and/or changes are counted against the contract.
Send Expiration Reminder	Select this checkbox to enable an Expiration Reminder notification to be sent when the contract is about to expire. The notification will be sent according to the value specified in the applicable Threshold Value or Days Before field. Recipients are specified in the Notification Event field.
Threshold Value	Enter the number of incidents and/or changes to be reached before triggering the Expiration Reminder notification to be sent.
Days Before	Enter the number of days before the Duration End date in which to trigger the Expiration Reminder notification to be sent.

Field	Description
Hours of Operation	Select the Hours of Operation definition that has the time frames in which the contract should be in effect; incidents and/or changes will be counted against the contract during the these time frames. Click the Hours of Operation link to display details on the selected definition.  Default Hours of Operation Day | Open | Close Sunday Monday 08:00 AM 05:00 PM Tuesday 08:00 AM 05:00 PM Wednesday 08:00 AM 05:00 PM Thursday 08:00 AM 05:00 PM Friday 08:00 AM 05:00 PM Saturday Blocked Dates None You can select the Default Hours of Operation or a definition created in the Configuration module.
Notification Event	Select one or more of the following service contract events that will trigger a notification, and then select the recipient for those notifications. ■ Initial Save - a service contract is initially saved ■ Duration Change - an entry is made in the Duration fields for a service contract ■ Contract Decremented - an incident or change is counted against a service contract ■ Status Change - an entry is made in the Status field for a service contract ■ Expiration Reminder - the contract is about to expire Settings on the Notifications tab in the Service Contract Basics Configuration screen will be used if nothing is selected in the Notification Event section in the Service Contract entry screen and no template is selected.

Field	Description
Comments	Enter any comments or extra information regarding the contract. If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Comments field; you can also display it by clicking the field label link to display a larger window. See "Using the Text Editor Toolbar" on page 45 for more information. You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB. When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).
Customers Companies Assets	Select the customers, companies, and/or assets to assign to the contract. When one of these is selected for an incident and/or change and the contract is within the specified duration and hours of operation, the contract count will be decremented. Note that service contracts can also be assigned via the Customer Profile, Company, and Asset entry screens.

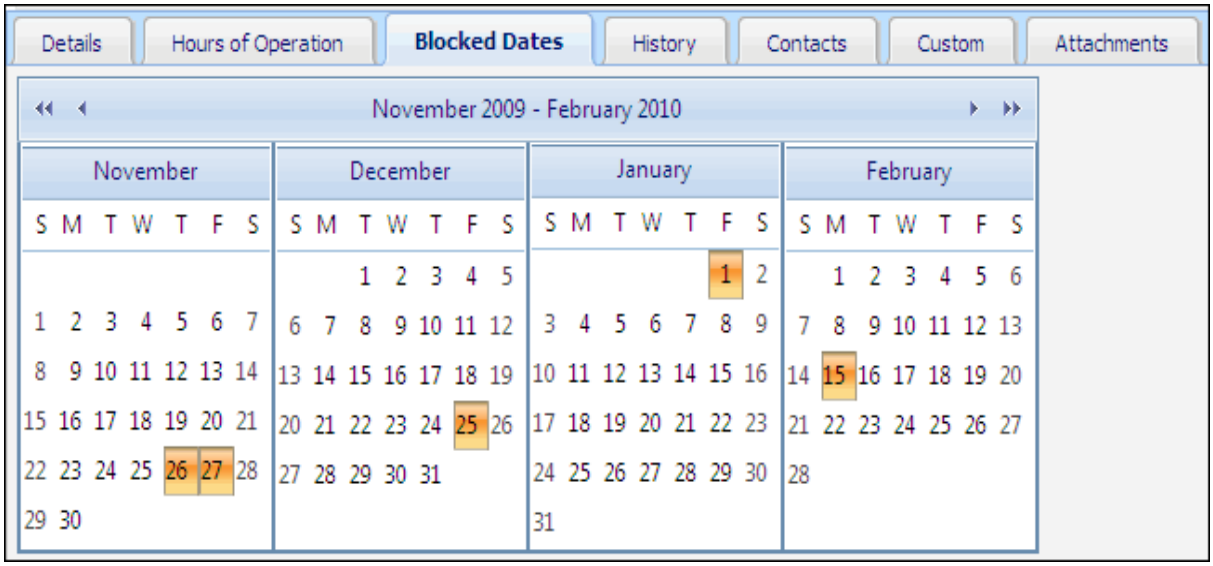
Selecting Hours of Operation

Use the Hours of Operation tab to select the timeframes in which the contract should be in effect; incidents and/or changes will be counted against the contract during the selected timeframes. You can select the 24/7 link to enable the contract to be in effect all days and hours, or select specific days and hours.



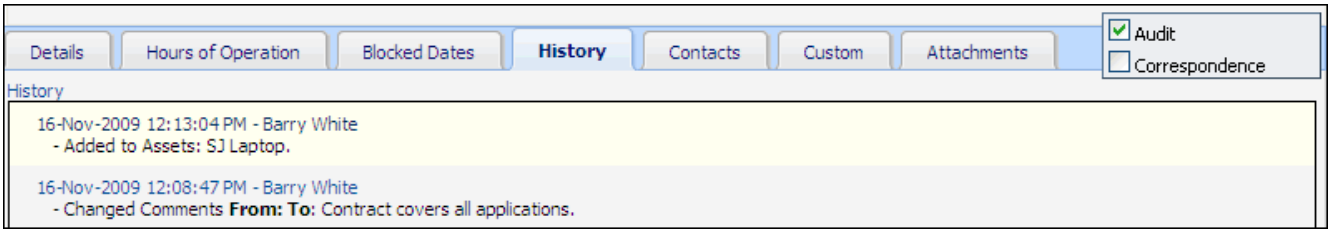
Selecting Blocked Dates

On the Blocked Dates tab, select the calendar dates on which incidents and/or changes should not be counted against the contract. This field is typically used to designate holidays. These settings should be updated every year.



Viewing History

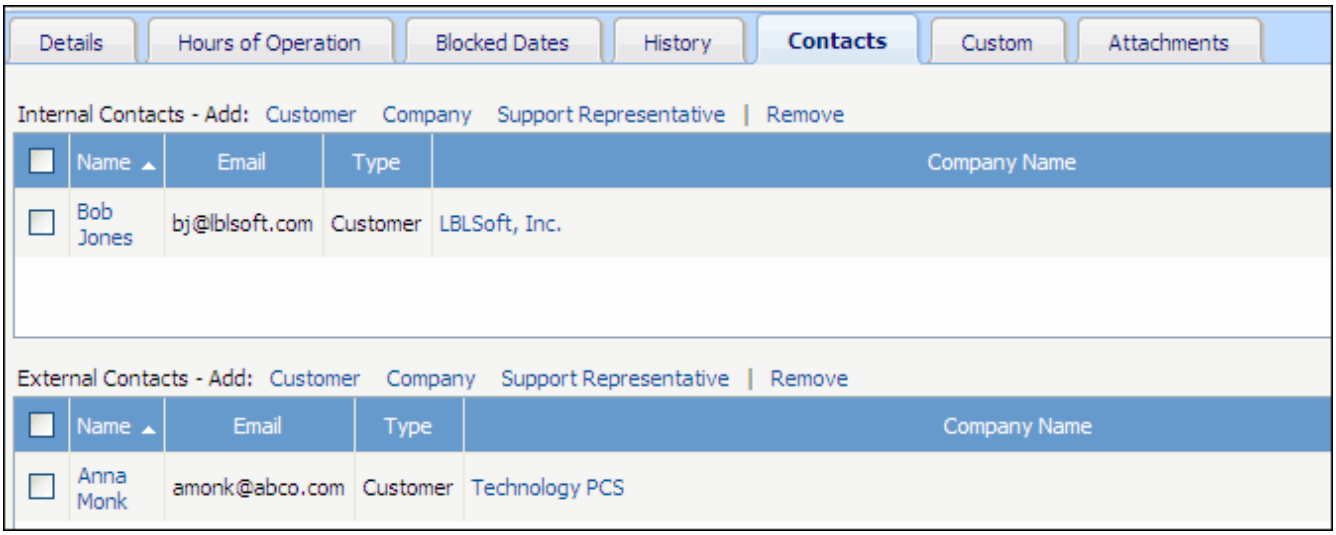
Use the History tab to view notations on all service contract actions.



- To view a notation of every action performed on the service contract including the date, time, and author stamp, select the Audit checkbox.
- Use the Correspondence checkbox to display entries of sent and received correspondence, including the subject line and body of the correspondence.

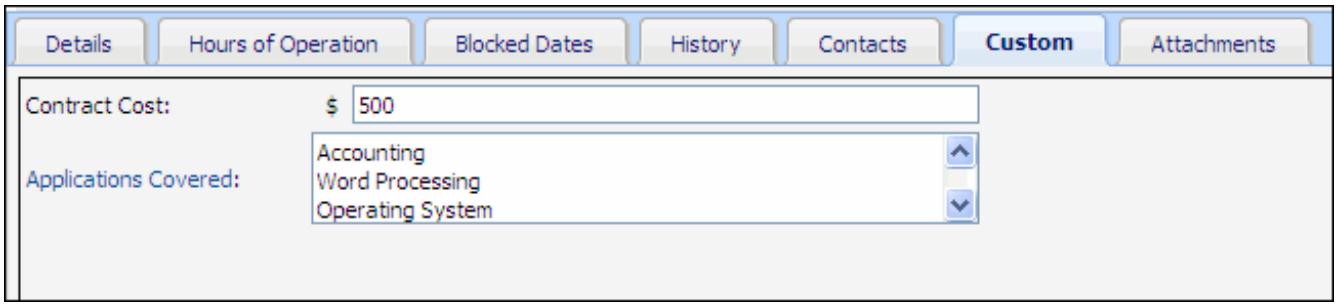
Selecting Contacts

On the Contacts tab, select the customers, companies, and/or support representatives that can be designated as recipients for the Initial Save, Duration Change, Contract Decremented, Status Change, and Expiration Reminder notifications enabled in the Notification Event field on the Details tab.



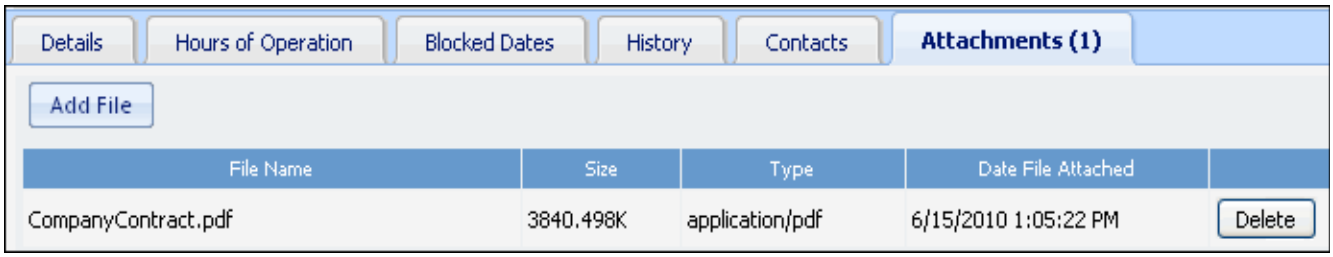
Completing Custom Fields

The fields on the customizable tab are used to enter information specific to your company. The name of the tab is specified during configuration. You may be required to enter information in these fields.



Attaching Files

To attach a file to the service contract, click on the Add File button on the Attachments tab and select the file. The file name appears in the Attachment field.

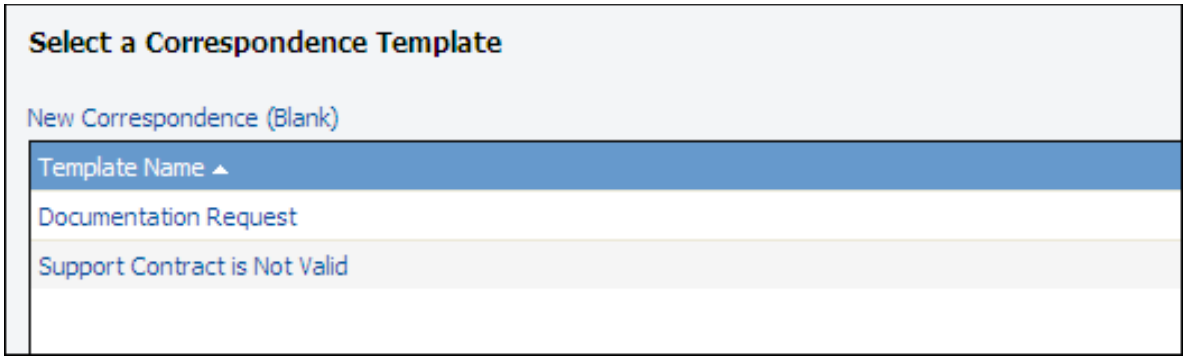


Sending an Email From a Service Contract

To send an email from the Service Contract screen, you can:

- Select New | Correspondence.
- Click the New Correspondence icon.

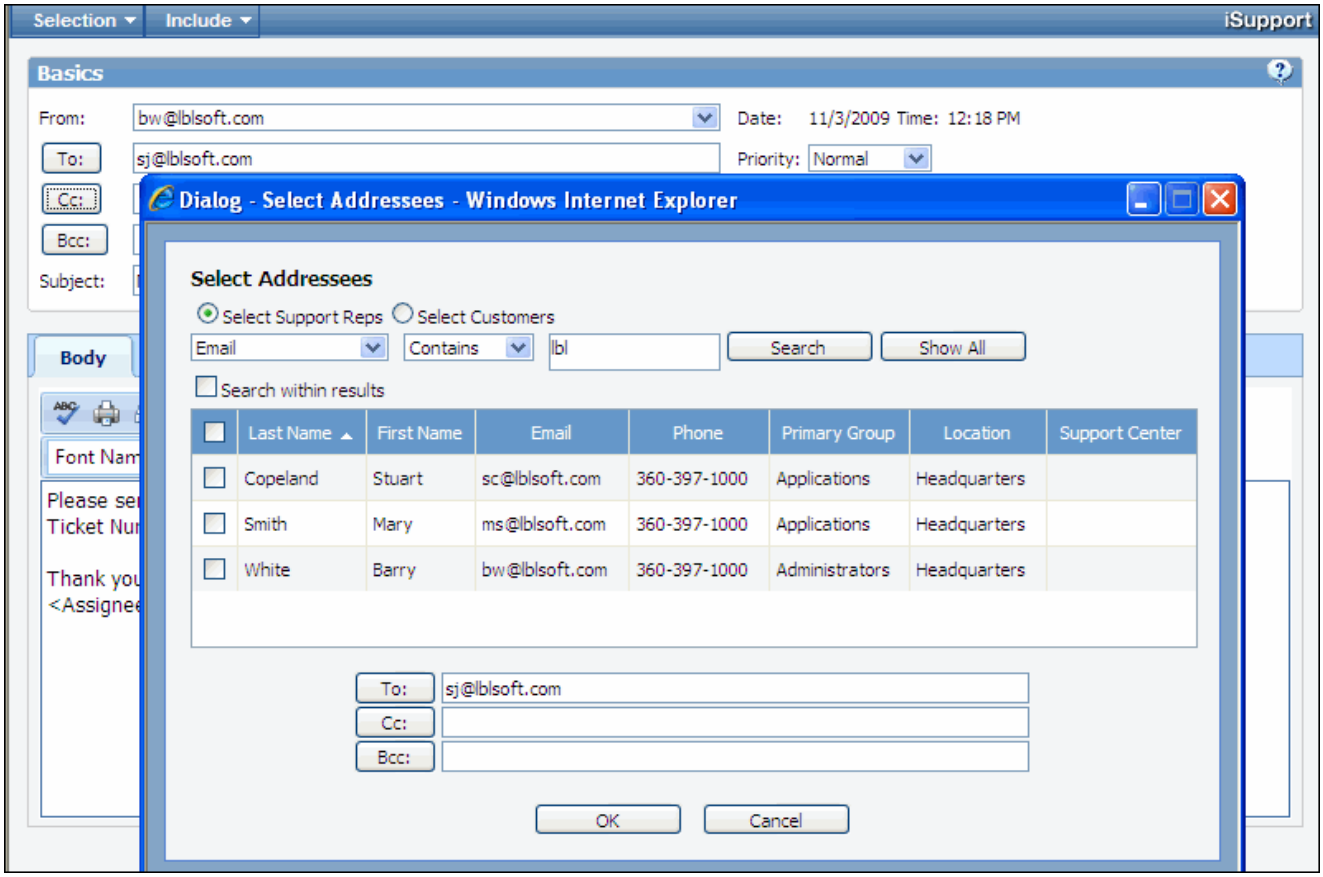
You can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).



Correspondence templates may be configured to contain only read-only (greyed out) fields.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included. If creating a new correspondence document, the CC, BCC, Subject, and Attachments fields are blank.

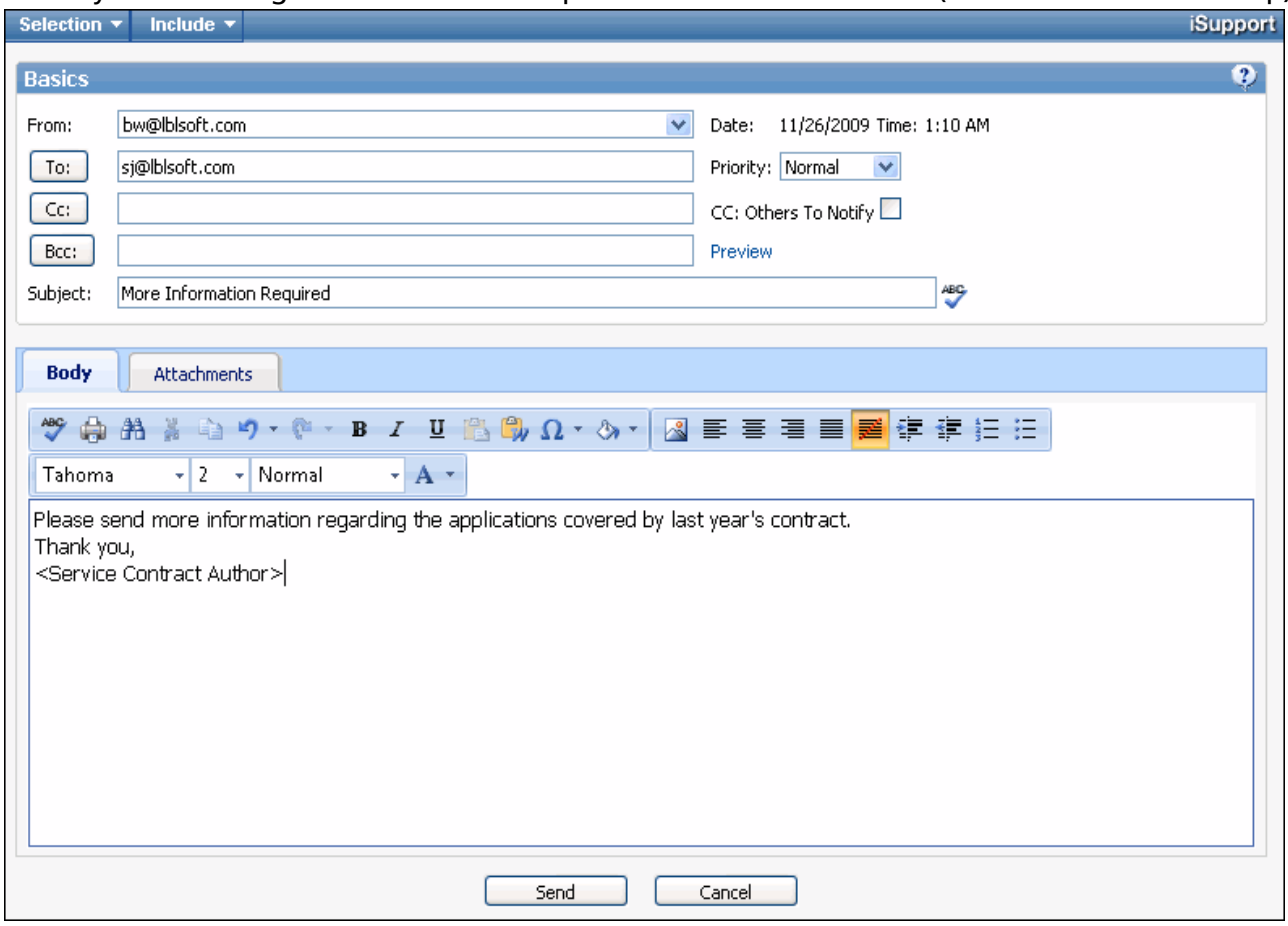
You can click the To, Cc, and Bcc buttons in the Correspondence screen to display a dialog for selecting addressees. Use care with the Select All ☐ checkbox, as it will include all names on the current page (up to 100 addressees).



If using a template, some or all of the fields may be populated. Fields (for example, <First Name>) may be included as set up during configuration. These fields will be replaced with corresponding data from the contract when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

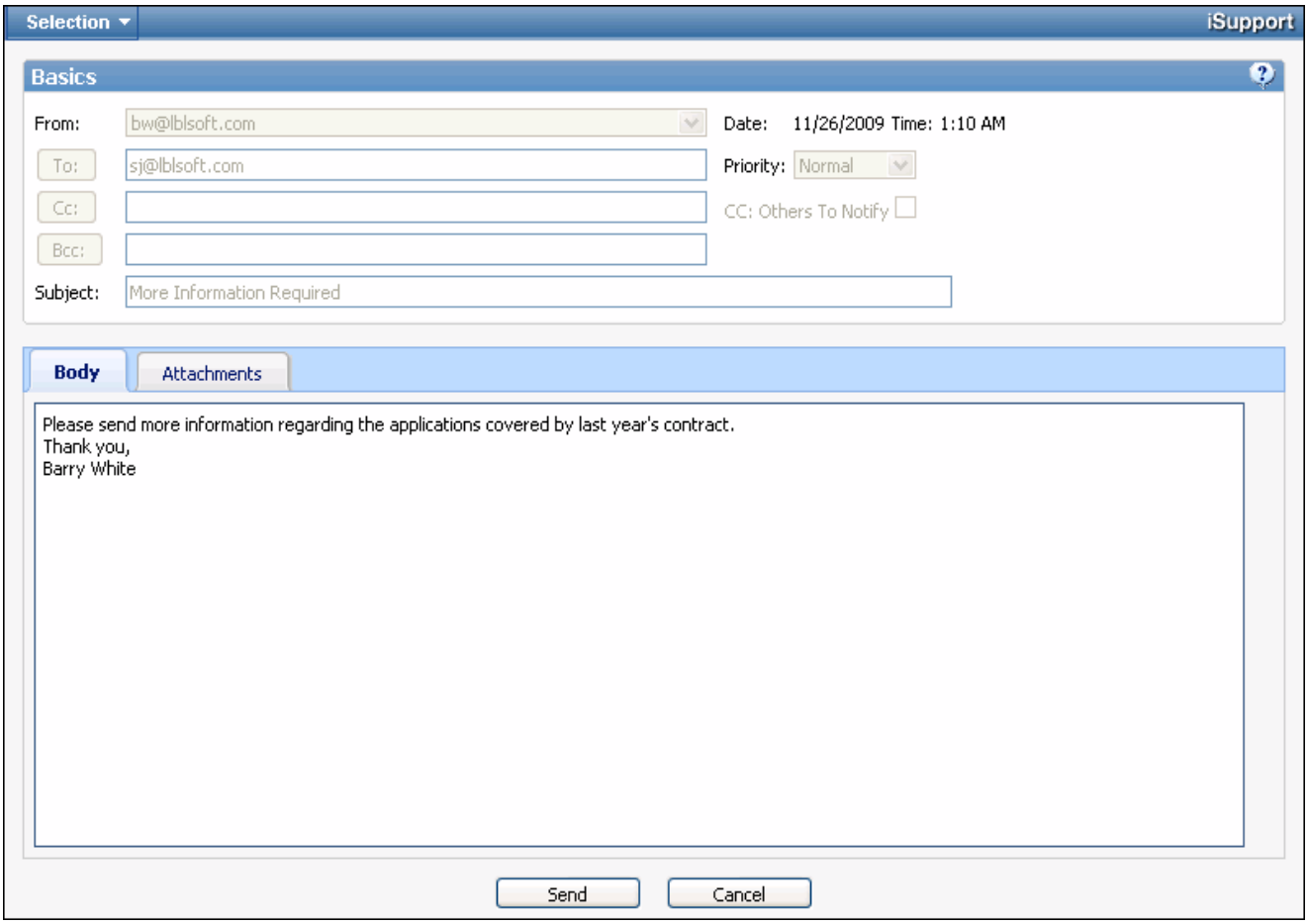
In either a blank correspondence or correspondence created from an editable template, the Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).



The text editor toolbar appears; see "Using the Text Editor Toolbar" on page 58 for more information. You can use the Image Upload icon to upload saved screenshots and other images up to 2 MB. The icons in the toolbar will display tooltips with keyboard shortcuts.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the service contract.



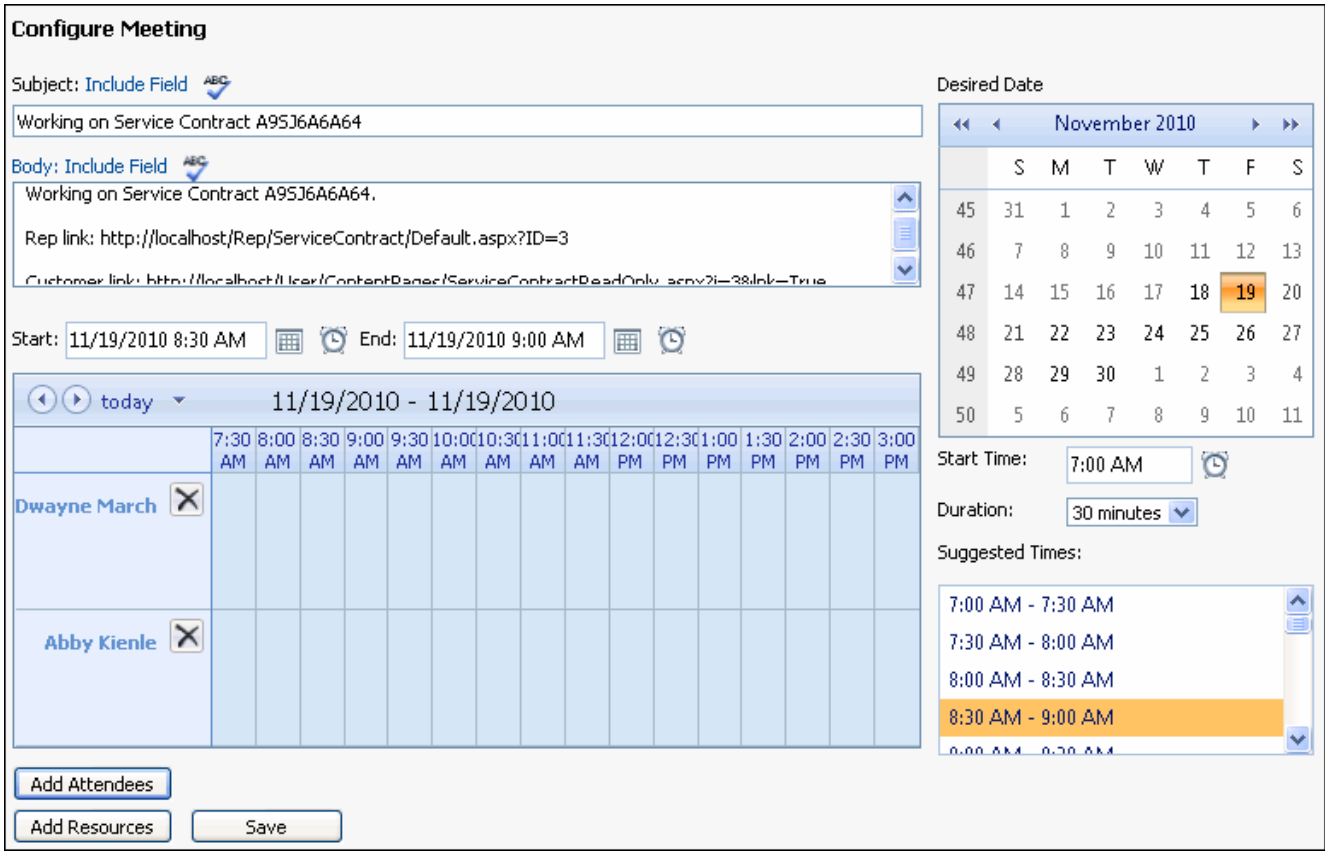
When finished completing fields in the Correspondence dialog, click the Send button.

After the email is sent and the service contract is saved, notations are included on the History tab.

Accessing Outlook Calendar

If configured, a New Meeting icon may appear in the Service Contract screen after a contract is saved for scheduling a Microsoft® Office Outlook® calendar meeting. You can view the schedules

of meeting attendees, enter the subject and body of the email to be sent to the meeting attendees, and use include fields to insert data from the associated record when the email is sent.



In the Configure Meeting screen, you can:

- Enter the subject and body of the email to be sent to the meeting attendees. The text "Working on Service Contract *<service contract number>*" will be included by default in the meeting entry along with a link to the record via the Desktop and End User Desktop. You can use include fields to insert data from the associated record when the email is sent.
- View the schedules of meeting attendees and select the desired meeting day, start time, and duration.
- Add resources and customer and support representative attendees.

After saving, the View Meetings link will appear in the Service Contract screen for displaying meeting details.

Using Service Contract Templates

Use templates for service contracts that are entered frequently. If configured, defaults may populate fields in the Service Contract screen. **To use a service contract template,** click the icon or select Service Contract | Use Service Contract Template.

16 Getting Help

To keep up with the latest developments at iSupport Software, download product updates, and look for answers to your support questions, go to our web site at www.iSupport.com.

To download product updates and documentation, select Customer Support and Downloads in the Support section. The Downloads area enables you to download product updates and other applications. You'll need a password to download and to view and submit incidents.

Contacting iSupport Technical Support

For product support, contact the iSupport Technical Support department. Contact information is listed below.

Phone	360.397.1099
Fax	360.397.1007
Email	support@iSupport.com
Web site	http://www.iSupport.com/support

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