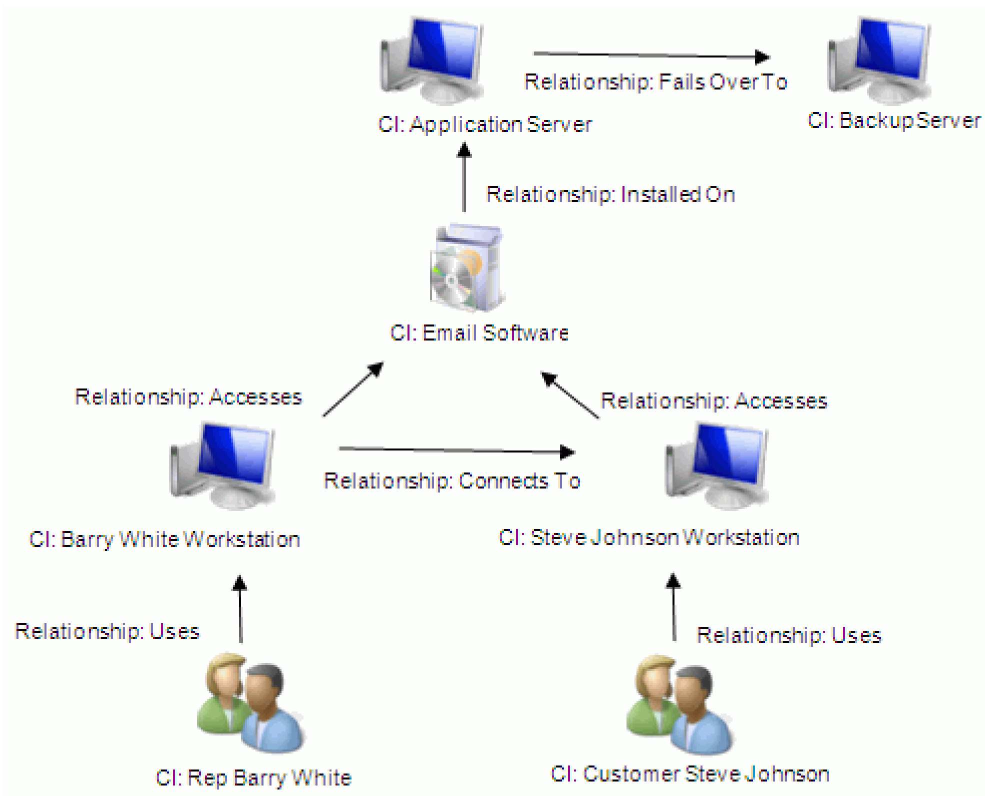
Configuring iSupport® CMDB Functionality

Configuration Management functionality is included if you have the Service Desk edition. iSupport's Configuration Management Database (CMDB) functionality tracks the assets, services, and other resources that are crucial to your organization's operation and the relationships between these components. To create your CMDB, you'll create configuration items (CIs) for the resources you want to track and define the relationships between CIs. Because CMDB functionality is highly configurable, it is useful to chart the resources you wish to track, the relationships between them, and the status labels that could apply. See "CMDB Hierarchy Example" on page 3 for step-by-step instructions on creating an example hierarchy of configuration items.



Configuration Overview

Basic Configuration

- Enable/disable CMDB functionality and set up CMDB types in Feature Basics to classify CIs and define the custom status fields, optional/custom fields, notifications, relationships available, and maintenance/warranty information for those types. See "Configuring CMDB Types" on page 7. You can create and assign custom entry layouts with configuration types.
  - Set up configuration item relationships between CIs. See "Configuring CMDB Relationships" on page 16 for more information.
  - You can associate existing assets, companies, customers, support representative profiles, customer groups, and support representative groups for views, reports, and correspondence. Enable associated items via the CMDB Type screen if you wish to:

    - Automatically create configuration items for existing asset, company, customer, support representative profile, or members of a customer group or support representative group.

- Synchronize customer and support representative group relationships.

- Utilize the data on an asset, company, customer, support representative profile, customer group, or support representative group 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.

- View and open related asset records and perform asset scans on non-Windows SNMP-enabled devices in your network, computers with Windows 98 and above, or any other WMI-compliant machine (WMI must be installed and active).

- You can configure CMDB groups to define and associate a collection of CIs for access, views, and reports. See “Creating CMDB Groups” on page 17.

Creating and Managing Configuration Items

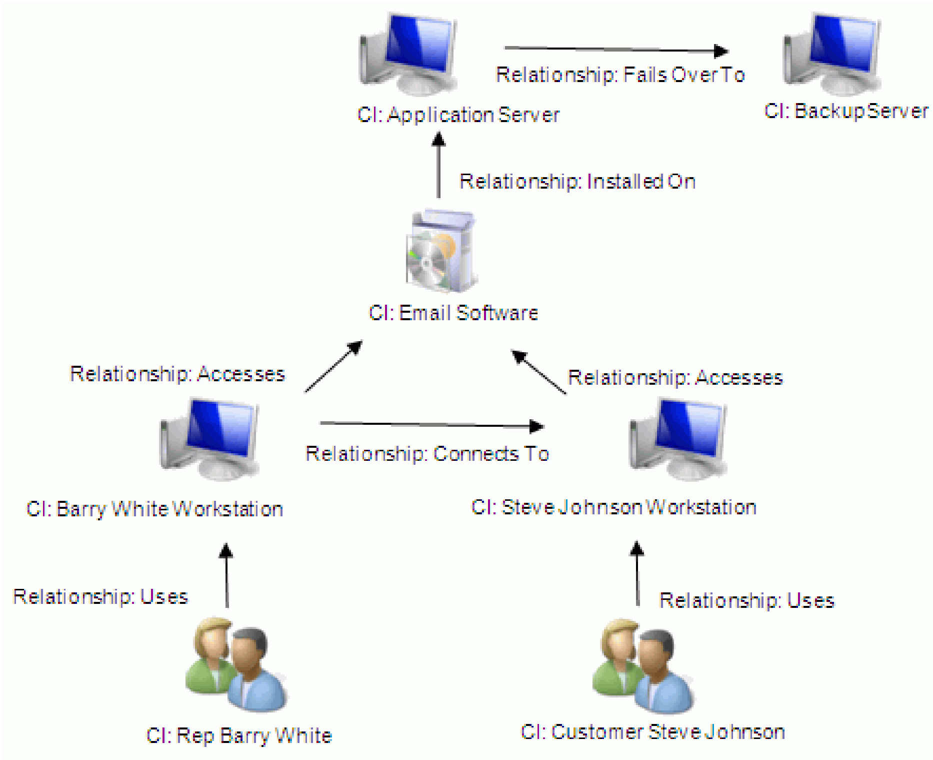
- You can manually create configuration items in the Configuration Item entry screen. See “Using the iSupport® Configuration Item Screen” on page 60.
- You can use the Data Source Integration screen to import CI records from one or more Microsoft SQL Server source databases into iSupport’s CMDB database, and synchronize with those source databases on an interval basis. See “Using the Data Source Integration Feature” on page 18.
- You can use the Configuration Item Auto Create agent to automatically create a CI record for each Asset, Customer, Company, and or Support Representative Profile record that is not already associated with a CI. See “Creating Configuration Items Automatically” on page 43.
- You can use the Generate QR code option in the toolbar to generate a QR code that contains a link that will display information about the record. You can also use the QR code to add a configuration item to an incident, problem, or change via the mobile interface, but note that the QR code reader option for selecting a configuration item in the HTML5 mobile interface will be hidden if using an Android device.

Optional Customization

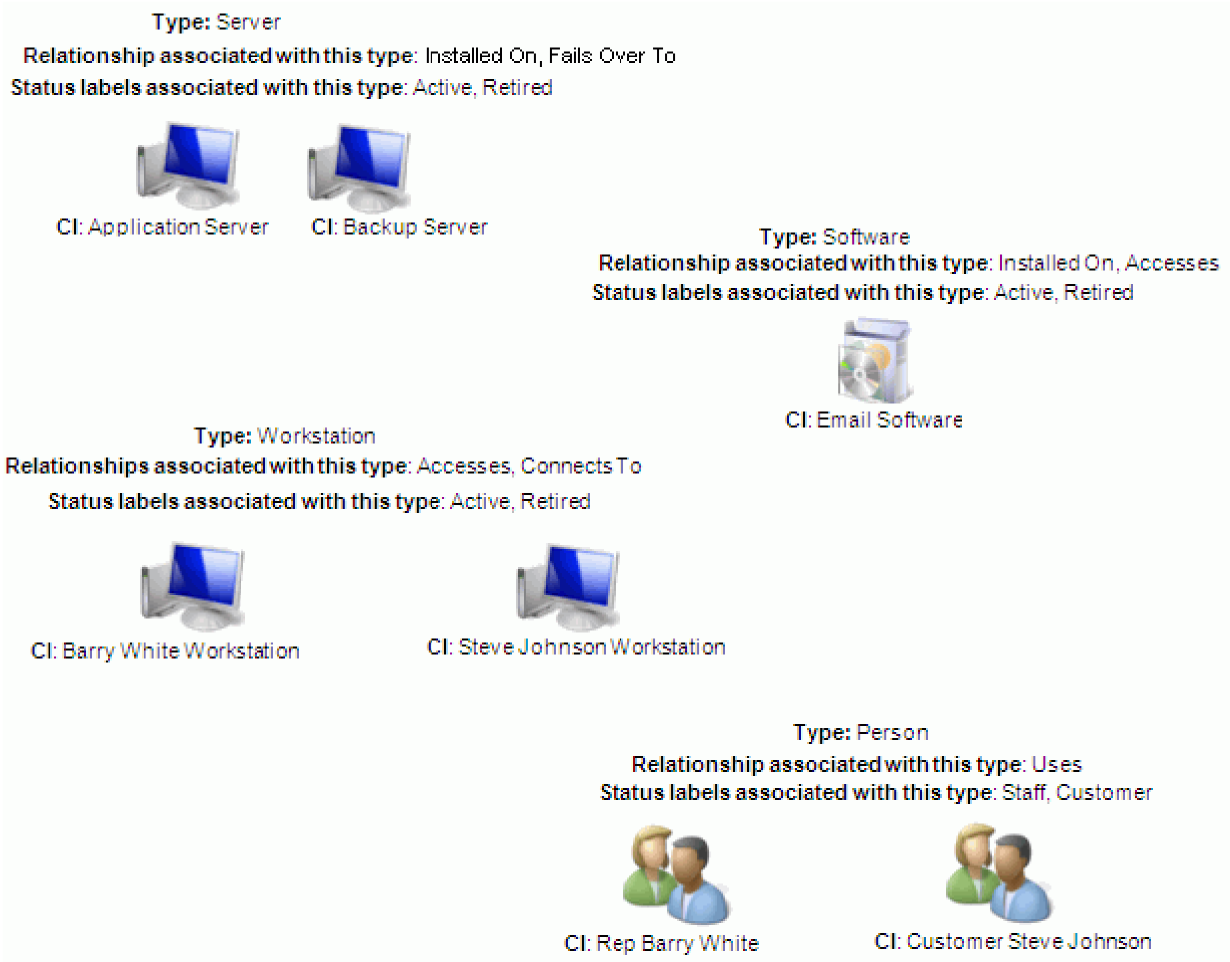
- You can use the Layouts screen to create layouts with fields and tabs that are specific to your company, and assign different layouts to configuration item types via the Types screen. See “Configuring Screen Layouts” on page 30.
- Go to the Options and Tools | Customize | Custom Fields screen to set up global **custom fields** for configuration items. See “Configuring Custom Fields” on page 23.
- Go to the Options and Tools | Customize | Custom Status Labels screen to define labels for **status levels** that can be assigned to configuration items. The associated labels will appear for selection when a type is selected in the Configuration Item entry screen. See “Configuring Custom Status Labels for Configuration Items” on page 42.
- Enable and customize **notifications** for CI-related events such as record saves, work history updates, status changes, and maintenance, warranty, and lease **expiration**. You can use or modify iSupport’s default notifications or create new notifications. Use an **Others to Notify** list in correspondence and notifications to keep those not directly involved in the process in the loop. See the online help for configuration information.

CMDB Hierarchy Example

The steps below contain information on creating the simple CMDB hierarchy shown below.



The CMDB types, relationships, and status labels you'll create are shown below. Use CMDB types to classify similar configuration items. You'll specify the optional and custom fields to display when the type is selected in the Configuration Item entry screen as well as the notifications, relationships available, and maintenance/warranty information. You'll also create and assign custom status labels such as Active and Retired to designate the status of a configuration item.



1 Use the Options and Tools | Customize | **Custom Status Labels** screen to define labels for status levels that can be assigned to configuration items. Labels in this example: Active, Retired, Staff, Customer.

2 Use the Configuration Management | Relationship tab in Core Settings | Feature Basics to define **relationships** between CIs. Relationships in this example: Fails Over To/Supports Fail Over, Installed On/Contains, Accesses/ Accessed By, Connects To/Connected To, Uses/Used By.

3 Use the Configuration Management | Relationship tab in Core Settings | Feature Basics to define **configuration item types** for classifying CIs and defining the optional/custom fields and relationships available. Types in this example: Server, Software, Workstation, Person. For each type, select the Status checkbox in the Optional Fields section to display the Statuses tab and add the labels listed in the diagram above, and then select the Relationships tab and add relationships listed above.

4 Create the following configuration items via the **Configuration Item screen (accessed via the Desktop Create menu)**: Application Server, Backup Server, Email Software, Rep Barry White, Customer Steve Johnson, Barry White Workstation, and Steve Johnson Workstation configuration items. Be sure to select the applicable type as shown in the diagram above. Don't complete the Relationships tab; you'll add the relationships in step 5.

5 Add a Configuration Item view to a dashboard on the Desktop. Following the steps below, use the Configuration Item screen to add relationships between configuration items as shown in the diagram at the beginning of this section. Start at the bottom of the diagram and work your way up.

   a Open the Rep Barry White CI record; on the Relationships tab, click Add, select Uses, and then select the Barry White Workstation CI. Save and close the window.

   b Open the Customer Steve Johnson CI record; on the Relationships tab, click Add, select Uses, and then select the Steve Johnson Workstation CI. Save and close the window.

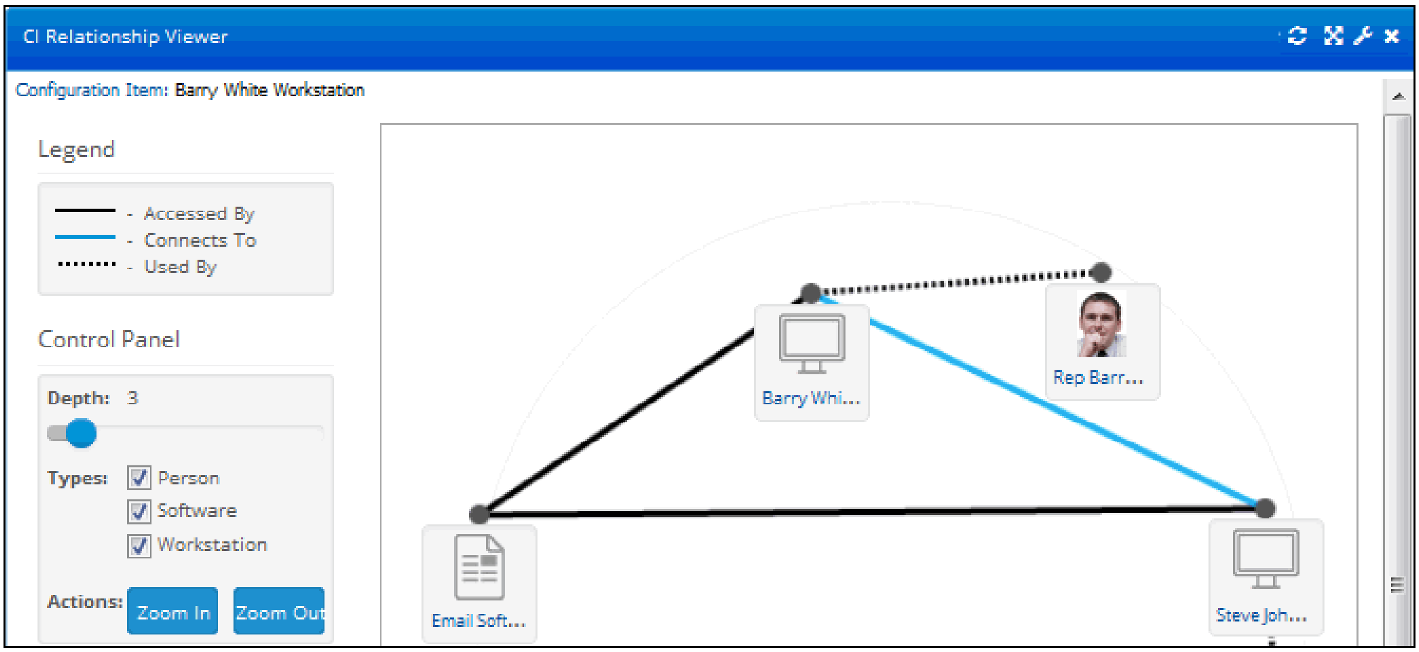
c Open the Barry White Workstation CI; on the Relationships tab, click Add, select Connects To, and then select the Steve Johnson Workstation CI. Click Add, select Accessed By-Accesses, and then select the Email Software CI. Save and close the window.

d Open the Steve Johnson Workstation CI; on the Relationships tab, click Add, select Accessed By-Accesses, and then select the Email Software CI. Save and close the window.

e Open the Email Software CI; on the Relationships tab, click Add, select Installed On, and then select the Application Server CI. Save and close the window.

f Open the Application Server CI; on the Relationships tab, click Add, select Fails Over To, and then select the Backup Server CI. Save and close the window.

6 To view the relationships, add the **CMDB Relationship Viewer** to a Desktop dashboard as shown below. Click on an item to display related items below it.



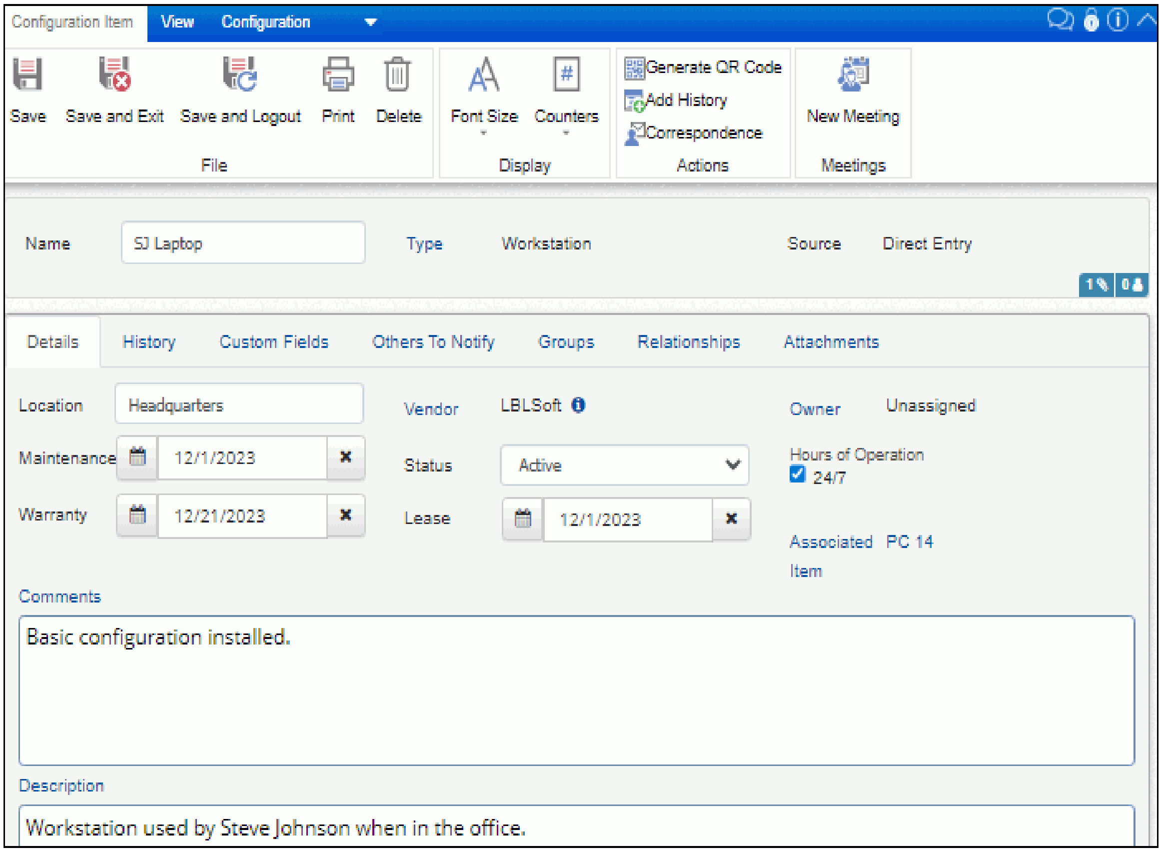
7 Associate a configuration item with an incident. In the example below, customer Steve Johnson cannot access email; an incident is created with that customer and the Email Software configuration item is added to the Configuration Items tab.

Configuration Items

Add Remove

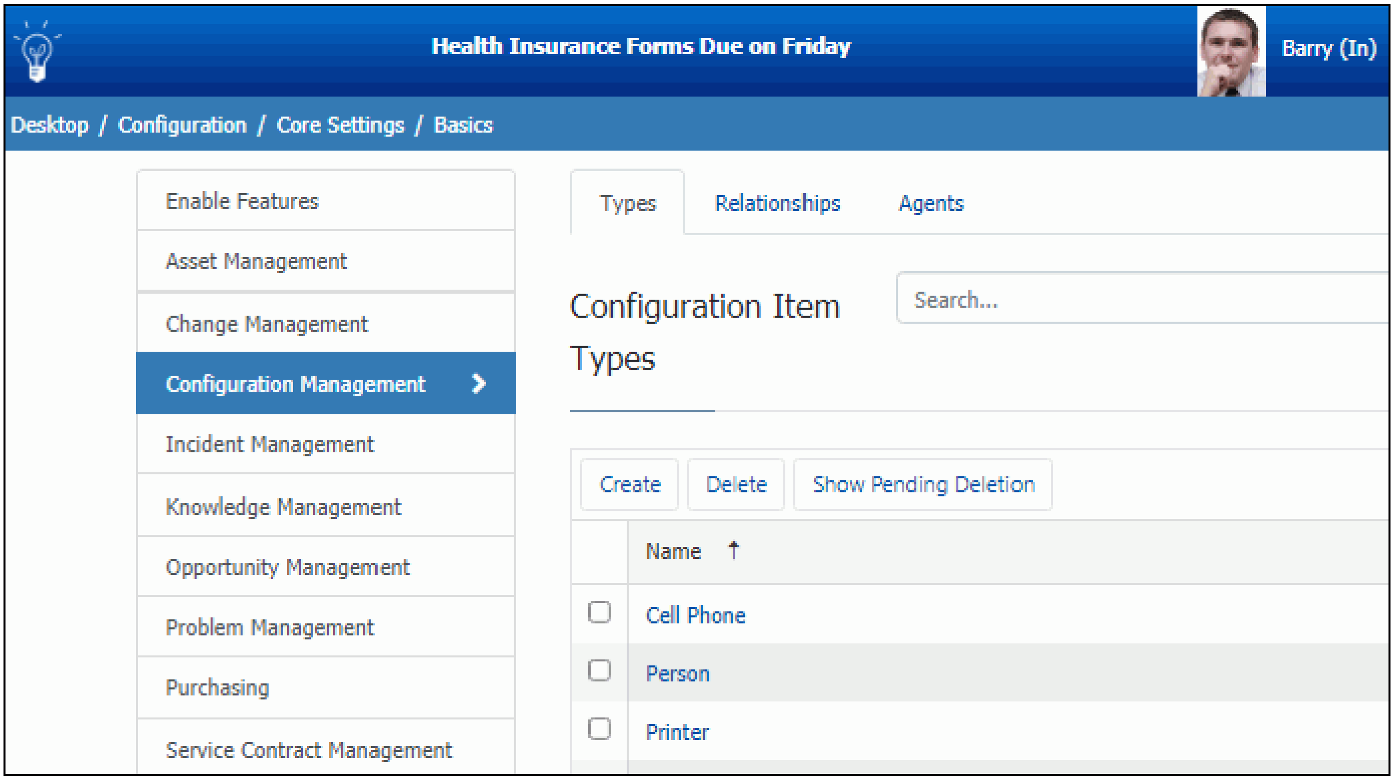
Name ▲	Type	Open Work Items
Email Software	Software	No

You can associate a configuration item with an incident, problem, or change, and then click on the link to display the Configuration Item screen for viewing details and relationships with other items.



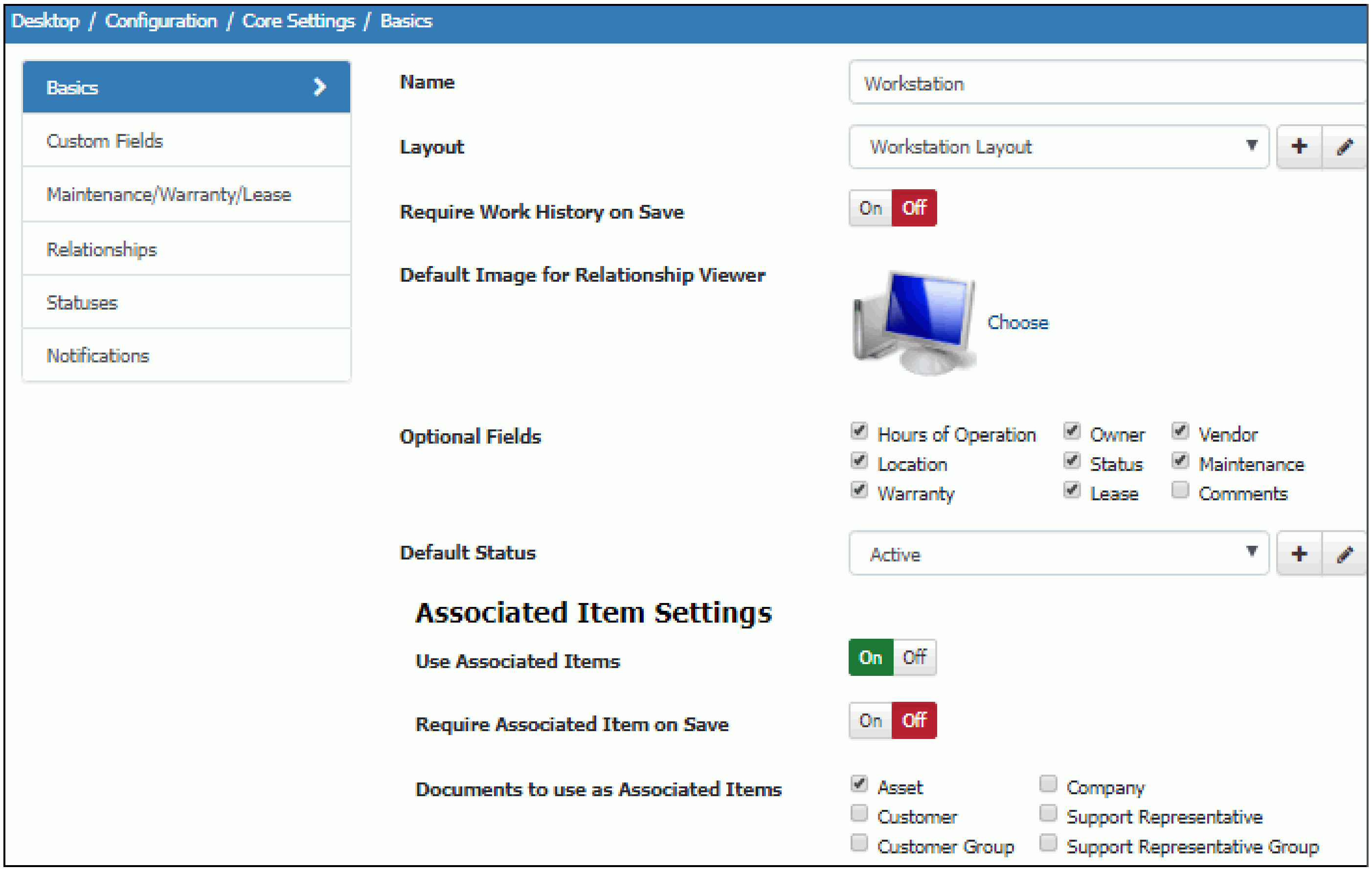
Configuring CMDB Types

Use the Configuration Management | Configuration Types tab in Core Settings | Feature Basics to configure types for classifying configuration items. Several predefined types are included in iSupport, but you can rename or create any type applicable to your environment such as Device, Data Store, People, Service, Documents, Software, or Locations.



Use the Show Pending Deletion link to display records that 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 these records.

Use the Basics tab to specify the optional and custom fields to display when the configuration type is selected in the Configuration Item entry screen, the image to appear when CIs of this type appear in the Relationship Viewer, and associated item settings.



Name - Enter a name for the CMDB type.

Layout - Select the layout containing the fields and tabs that will display when the type is selected in the Configuration Item screen. Configuration item layouts are configured in the Layouts configuration screen; see “Configuring Screen Layouts” on page 30 for more information. If None is selected in this field, the layout designated as default in the Layouts screen will be used when a Configuration Item record of this type is created.

Require Work History on Save - Select Yes to require an entry in the Work History field before records of this type can be saved.

Default Image for Relationship Viewer - Select an image to designate records of this type in the Relationship Viewer. You can select an image included by default in iSupport or click the Add New Image link to select your own image. The image will appear as an 80x80 pixel thumbnail.

Use Associated Items - Enable associated items if you wish to:

- Automatically create configuration items for existing asset, company, customer, support representative profile, or members of a customer group or support representative group.
- Synchronize customer and support representative group relationships.
- Utilize the data on an asset, company, customer, support representative profile, customer group, or support representative group 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.

If associated items are enabled for a CMDB type (via the CMDB Types screen), the Associated Item link appears when the type is selected in the Configuration Item screen for associating an asset, company, customer, support representative profile, customer group, or support representative group.

Require Associated Item on Save - If associated items are enabled, select Yes to require a selection in the Associated Item field in the Configuration Item screen before a record of this type can be saved.

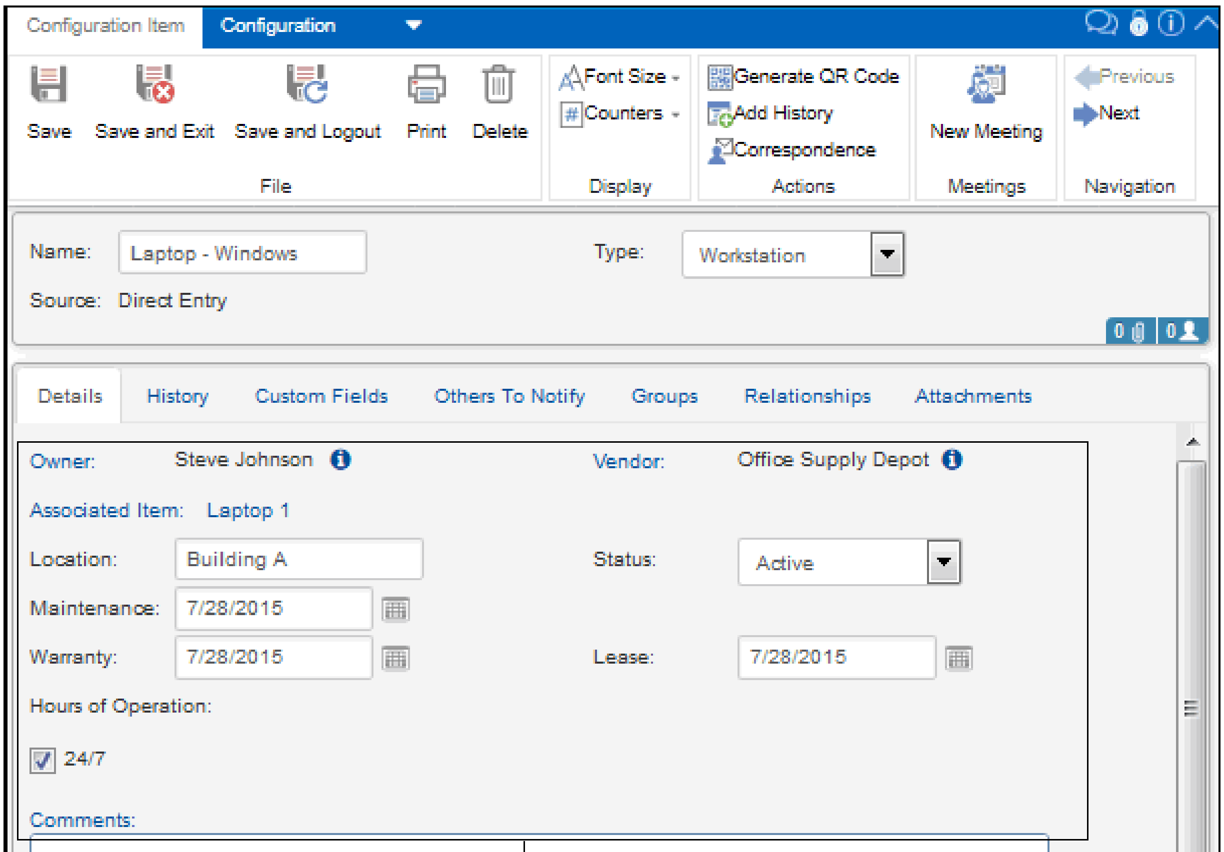
Documents to Use as Associated Items Asset/Company/Customer/Support Representative/Customer Group/ Support Representative Group - If associated items are enabled, select the type of record or group to appear for selection in the Configuration Item screen when the Associated Item link is clicked.

If you will be automatically creating, importing, or synchronizing configuration items for asset, company, customer, support representative profile records or members of a customer group or support representative group, select the type of record to create/synchronize.

Entering Optional and Custom Fields

You can set up custom fields and optional fields such as Owner and Location to display when this type is selected in the Configuration Item screen. These fields can be used with view, report, and correspondence functionality.

Details Tab in the Configuration Item Screen



Set up in the Optional Fields section in the CMDB Type screen

Hours of Operation - Enables selection of either 24/7 or one or more designated days/times. Note that this is not related to the Hours of Operation definitions configured via the Global Settings menu.

Owner - Enables selection of a customer or support representative.

Maintenance - Enables display of the Maintenance/Warranty/Lease tab and configuration of expiration notifications.

Warranty - Enables display of the Maintenance/Warranty/Lease tab and configuration of expiration notifications.

Lease - Enables display of the Maintenance/Warranty/Lease tab and configuration of expiration notifications.

Vendor - Enables selection from a list of customers, support representatives, or companies that have been designated as vendors in iSupport.

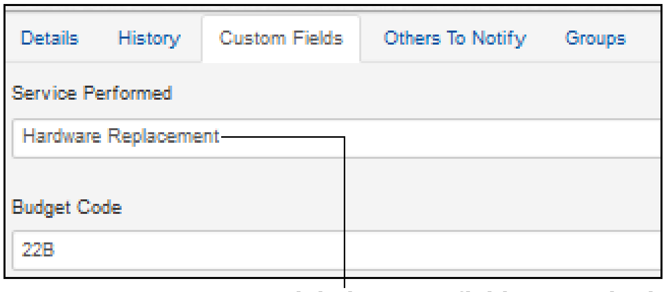
Location - Enables entry of a location. This field is not affiliated with iSupport's Location functionality that is used with location-based routing.

Comment - Enables display of a Comment field.

Status/Default Status - Enables display of the Statuses tab, on which you can select the predefined custom status labels that will be available in the Configuration Item screen. Once those status labels are selected, you can select the default status to appear in the Configuration Item screen when the type is selected. Use the ✚ Create New and ✎ View/Edit options to access the Custom Status Label screen.

Use the Custom Fields section on the CMDB Type screen to define the fields that will display on the Custom tab in the Configuration Item screen when this type is selected. The custom fields will display as shown in the example below in the Configuration Item screen. Custom fields for a CMDB type will display **below** any global custom CMDB fields.

Custom Fields in the Configuration Item Screen

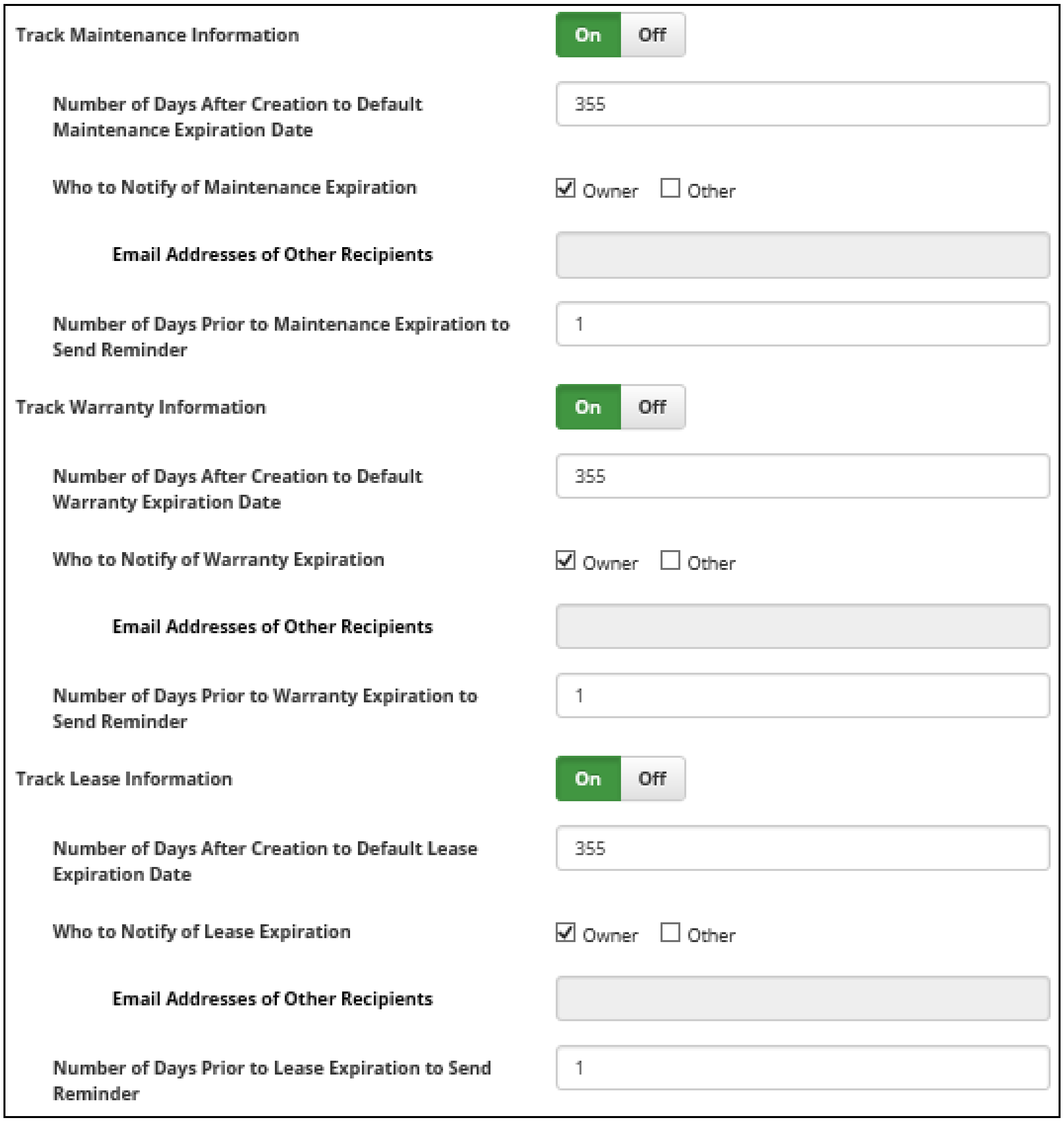


Set up via the Custom Fields tab in the Type screen

Global custom field set up via the Configuration Item tab in the Custom Fields screen

Configuring Maintenance, Warranty, and Lease Notifications

If the Maintenance, Warranty, and/or Lease optional fields are enabled for the type, use the Maintenance/Warranty/Lease tab to set up notifications associated with expiration dates. Expiration notifications are enabled on the Notifications tab.



Track Maintenance Information - Select Yes to enable maintenance notification functionality for configuration items of this type. Use the Notifications tab to designate the recipients and notifications to be sent on the schedule of the Configuration Item Reminder agent.

Who to Notify of Maintenance Expiration/Email Addresses of Other Recipients - If tracking maintenance information, select the person to whom the maintenance expiration reminder email should be sent.

- If Owner is selected on the Basics tab, select Owner to send the maintenance reminder email to the owner assigned to the configuration item (in the Configuration Item entry screen). The notification will contain configuration item details (for example, the name, type, and expiration date.)
- Select Other to send the maintenance expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the Configuration Item record.

Number of Days After Creation to Default Maintenance Expiration Date - Enter the number of days after a Configuration Item record of this type is created to display as default for the maintenance expiration date.

Number of Days Prior to Maintenance Expiration to Send Reminder - Enter the number of days before the expiration date in which the maintenance notification should be sent.

Track Warranty Information - Select Yes to enable warranty notification functionality, which sends notifications when a warranty expiration date is near. Use the Notifications tab to designate the recipients and notifications to be sent on the schedule of the Configuration Item Reminder agent.

Who to Notify of Warranty Expiration/Email Addresses of Other Recipients - If tracking warranty information, select the person to whom the warranty expiration reminder email should be sent.

- If Owner is selected on the Basics tab, select Owner to send the warranty reminder email to the owner assigned to the CI (in the CI entry screen).
- Select Other to send the warranty expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person.

Number of Days After Creation to Default Warranty Expiration Date - Enter the number of days after the CI record is created to display as default for the warranty expiration date.

Number of Days Prior to Warranty Expiration to Send Reminder - Enter the number of days before the expiration date in which the warranty notification should be sent.

Track Lease Information - Select Yes to enable lease notification functionality for configuration items of this type.

Who to Notify of Lease Expiration/Email Addresses of Other Recipients - If tracking lease information, select the person to whom the lease expiration reminder email should be sent. Use the Notifications tab to designate the recipients and notifications to be sent on the schedule of the Configuration Item Reminder agent in the Agents screen.

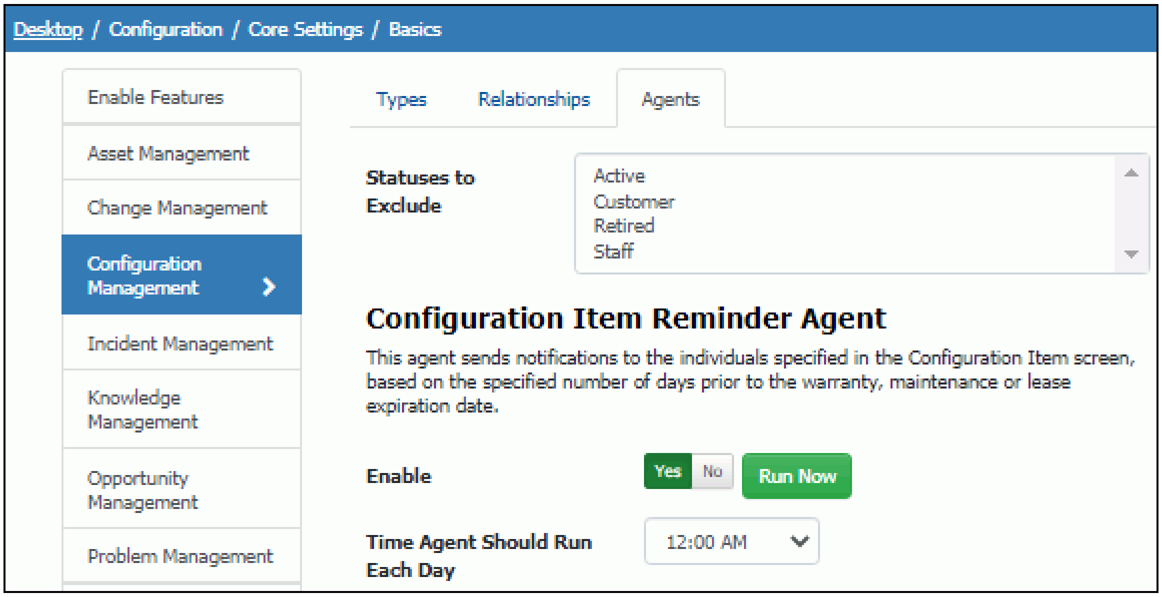
- If Owner is selected on the Basics tab, select Owner to send the lease reminder email to the owner assigned to the configuration item (in the Configuration Item entry screen). The notification will contain configuration item details (for example, the name, type, and expiration date.)
- Select Other to send the lease expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the Configuration Item record.

Number of Days After Creation to Default Lease Expiration Date - Enter the number of days after a Configuration Item record of this type is created to display as default for the lease expiration date.

Number of Days Prior to Lease Expiration to Send Reminder - Enter the number of days before the expiration date in which the lease notification should be sent.

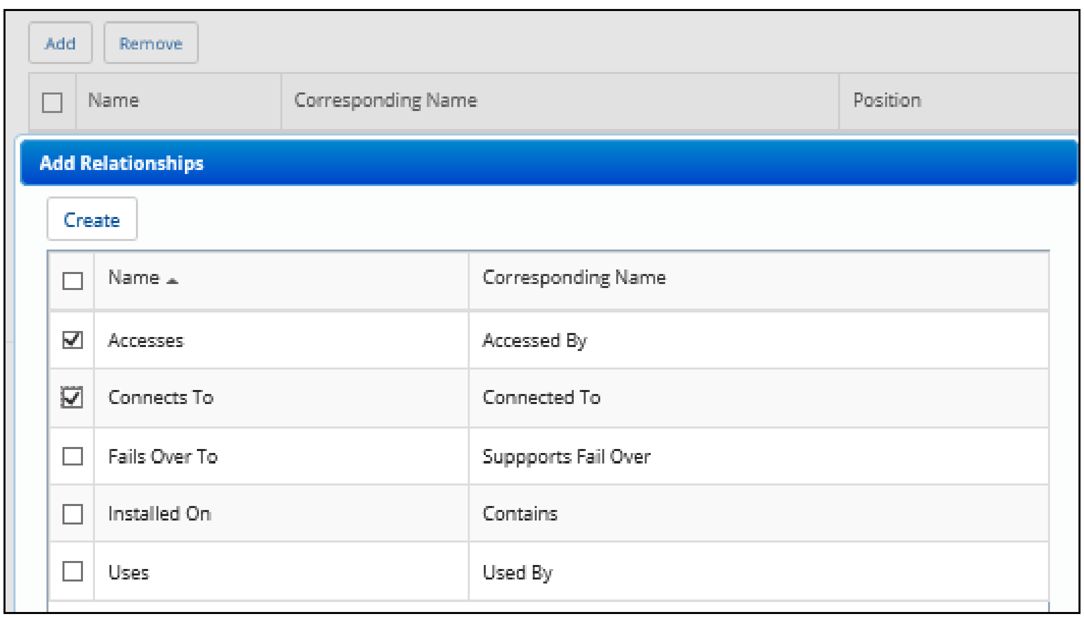
Scheduling the Configuration Item Reminder Agent

If you enabled maintenance, warranty, and/or lease expiration functionality, enable the Configuration Item Reminder agent in the Agents screen. You can use the Statuses to Exclude setting to select the statuses of the configuration items to exclude when CI searches on work items are performed.



Associating Relationships with a CMDB Type

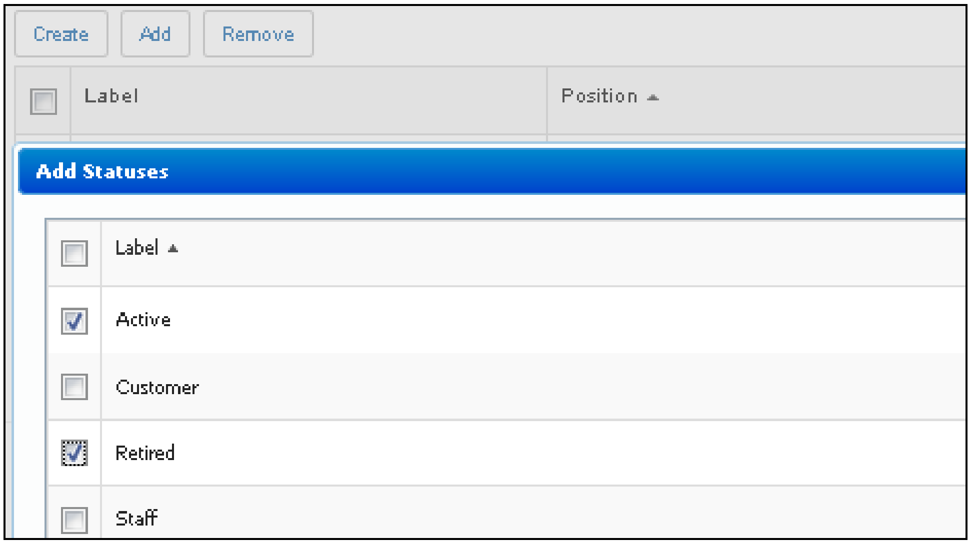
Use the Relationships tab to add all of the predefined relationships available for use with CIs of the specified type. For example, you could utilize a relationship called “Uses” to designate the relationship between a support representative CI and a software CI.



Assigning Statuses

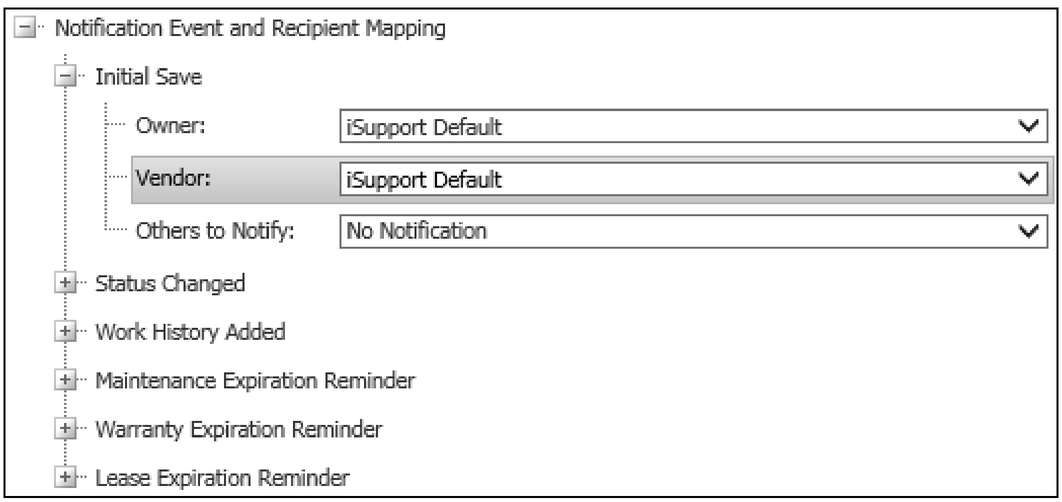
If Status is selected on the Basics tab, use the Statuses tab to associate status labels with the specified type. Select Create to use the Custom Status Labels screen to define these status labels. These status labels are different from other status labels in iSupport in that there are no fixed status levels; you can modify or delete any of the status labels included by default as well as enter new ones. The associated labels will appear for selection when a type is selected in the Configuration Item entry screen. Note you must have at least one custom status label.

In addition to status labels such as Active and Retired, you can create status labels to designate stages in the life cycle of a configuration item; for example, Designed, Ordered, Under Development, In Test, Implemented, In Production, and Under Maintenance.



Configuring Notifications for Configuration Item Events

Use the fields on the CMDB Types | Notifications tab to select notifications to be sent when a configuration item is initially saved or when the status changes or work history is added. You can select no notification, the default notification, or use the Create New and View/Edit options to access the Custom Notifications screen.



Initial Save - Select the recipients and notifications to be sent when a Configuration Item record is initially saved. The notifications will be sent on the schedule of the Configuration Item Reminder agent. The notifications will be sent on the schedule of the Notification agent (enabled via the Options and Tools | Administer | Agents screen).

Status Changed - Select the recipients and notifications to be sent when a selection is made in the Status field in the Configuration Item screen.

Work History Added - Select the recipients and notifications to be sent when an entry is made in the Work History field in the Configuration Item screen and the record is saved.

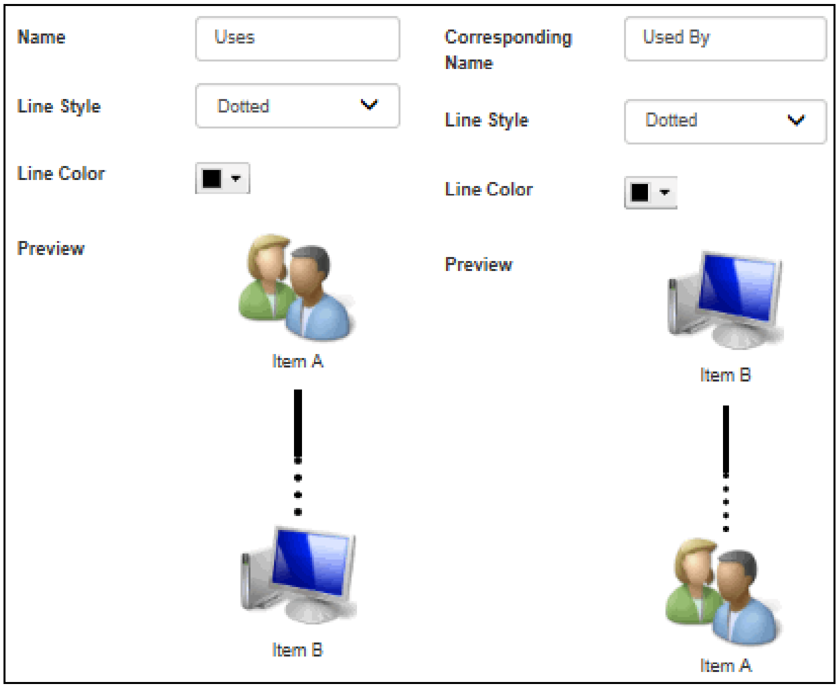
Maintenance Expiration Reminder - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty/Lease tab. The notifications will be sent on the schedule of the Configuration Item Reminder agent (enabled via the Configuration Management | Agents tab in the Feature Basics screen).

Warranty Expiration Reminder - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty/Lease tab. The notifications will be sent on the schedule of the Configuration Item Reminder agent (enabled via the Configuration Management | Agents tab in the Feature Basics screen).

Lease Expiration Reminder - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty/Lease tab. The notifications will be sent on the schedule of the Configuration Item Reminder agent (enabled via the Configuration Management | Agents tab in the Feature Basics screen).

Configuring CMDB Relationships

Use the Configuration Management | Relationships tab in the Feature Basics screen to define relationships between CIs; for example, Runs On, Hosts, Connects To, Manages, Located At, Relies On, Used By, Backed Up To, or Custom. Use the Line Style and Line Color fields to define the appearance of relationships in the Relationship Viewer that can be displayed on a Desktop tab or the Relationships tab in the Configuration Item screen.



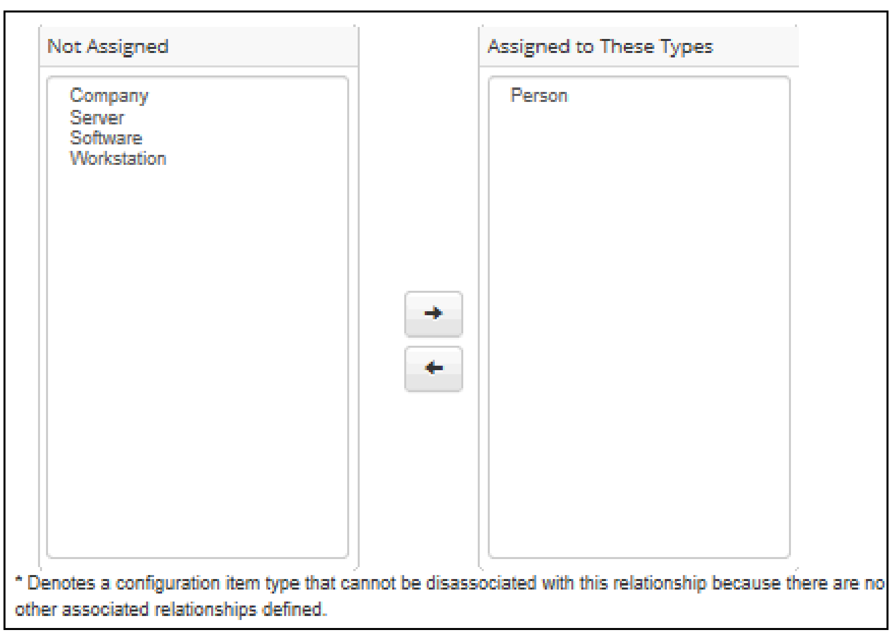
Name - Enter the name for one end of the relationship between two configuration items.

Corresponding Name - Enter the name for the other end of the relationship between two configuration items.

Line Color - Select a color for the line designating the relationship. The selected color will appear in the Preview area.

Line Style - Select a style for the line designating the relationship in the Relationship Viewer: Solid, Dotted, Dashed, or Double. The selected style will appear in the Preview area.

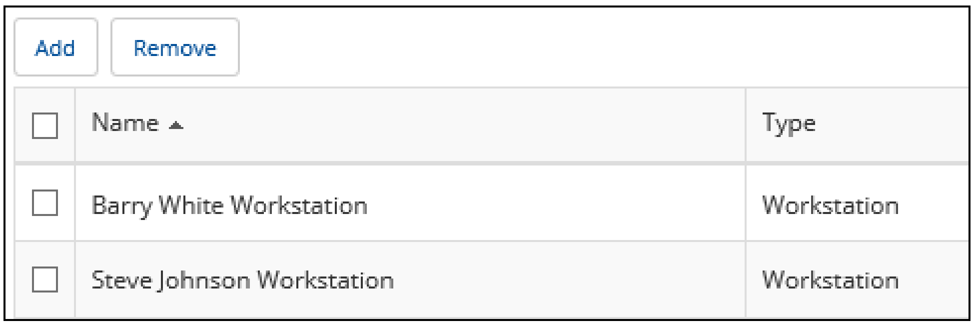
Use the Assignment tab to assign CMDB types to the relationship. The Not Assigned field includes predefined CMDB types; select the right arrow to assign a type to the relationship. To unassign a type, select the type under Assigned to These Types and select the left arrow. Note that each CMDB type must be associated with at least one relationship.



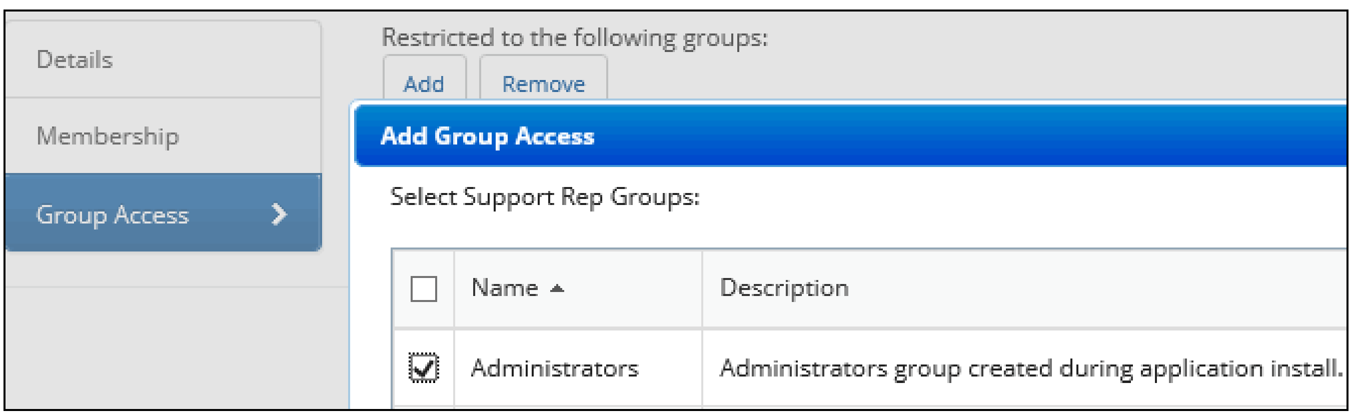
Creating CMDB Groups

Use the Configuration Management tab in the Core Settings | Groups screen to define and associate a collection of CIs for access, views, and reports. You can utilize iSupport's Group Access functionality to restrict access and display of a configuration item to members of a support representative group. To assign a configuration item to a group, you can use the Membership tab in this screen or on the Groups tab in the CI entry screen. Enter the name and description of the group on the Details tab.

Use the Membership tab to include configuration items in the group.



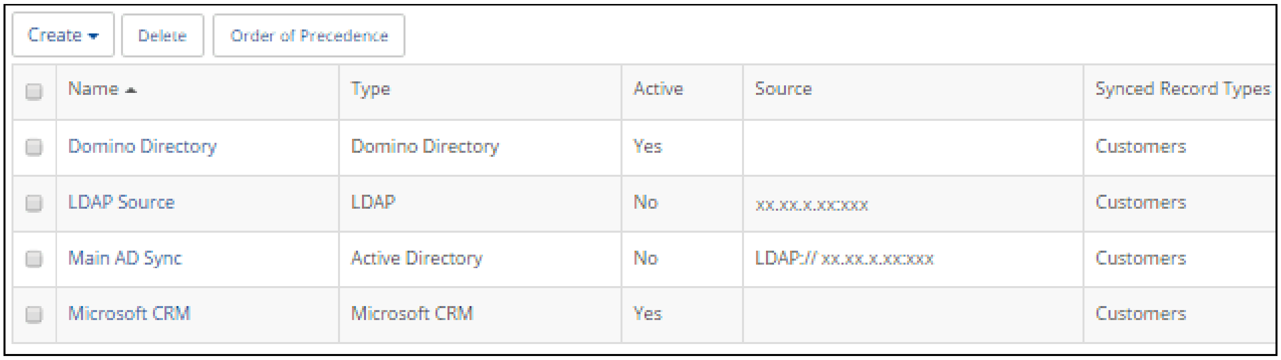
Use the Group Access tab to restrict access to CIs in the group to members of support representative groups. Click the Add link to select the groups. After saving, CIs in the group will be available only to members of the selected support representative groups. Note that group access permissions only restrict the ability to open a record (unless a group member is an owner); group access does not filter display of data in views, charts, and reports.



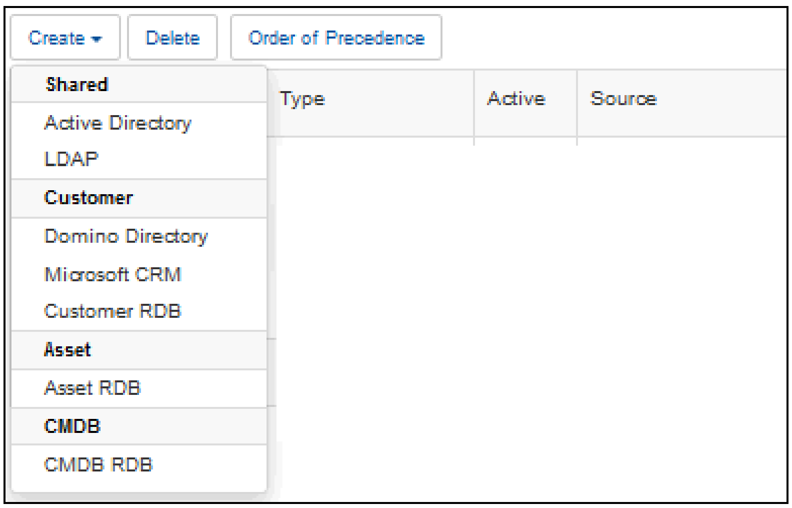
Using the Data Source Integration Feature

Use the Data Source Integration feature to perform a scheduled one-way synchronization between a specified Microsoft SQL Server database and the corresponding table in iSupport. If utilizing multiple data sources, select the Order of Precedence link.

To get started, click the Create link in the Options and Tools | Integrate | Data Source Integration screen.

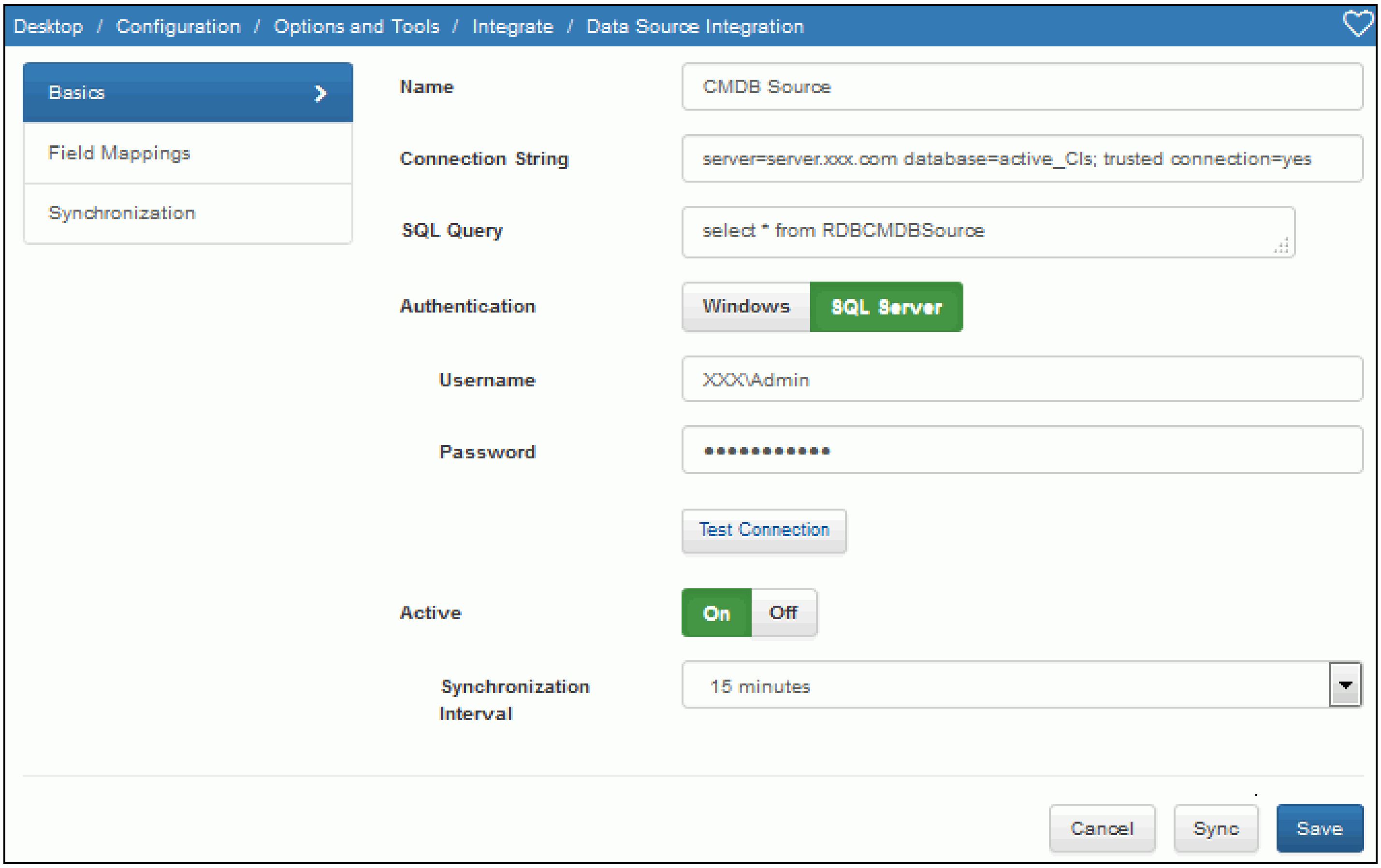


Select CMDB RDB, the data source type.



You'll enter a connection string and SQL query, and then click the Test Connection button to display columns in the source database on the Field Mappings tab for specific field mapping options. You can schedule synchronization to occur on an interval basis. If a matching field exists in the source database, the record will be updated in iSupport.

Use the Basics tab to specify the connection string, SQL query, authentication information, and synchronization interval.



Name - Enter a name for the SQL Server source definition. This name will appear in the list of integration definitions and in the Source field in the associated CI record.

Connection String - Enter the connection string for accessing the source database.

SQL Query - Enter the SQL query string for accessing the SQL columns in the source database. Click the Test Query button to populate the SQL Columns field on the Field Mappings tab.

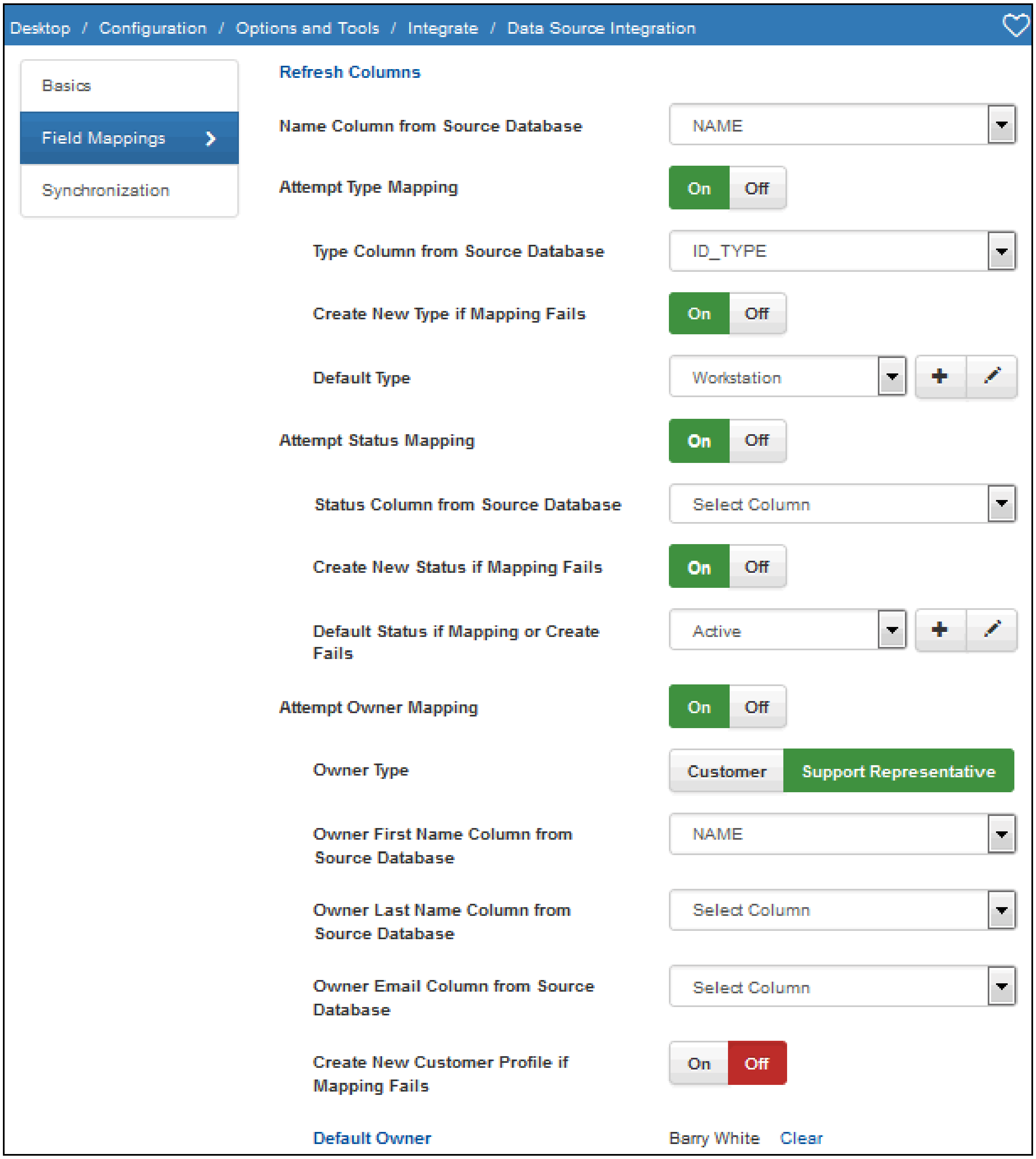
Authentication/Username/Password - Select the type of authentication to be used to access the source SQL Server database: Windows Authentication or SQL Server Authentication. If using SQL Server authentication, enter the user name and password for accessing the server. If using Windows Authentication, the database must have both of the iSupport user IDs listed, with the db_owner and public roles.

Active - Select Yes to enable the agent that updates the records in iSupport with the information in the SQL source database.

Synchronization Interval - Select the number of minutes in the interval for the synchronization to be performed.

Specifying Field Mappings

When the query connection is successful, use the Field Mappings tab to specify options for mapping the fields in the source database to the fields in the corresponding iSupport table.



Name Column from Source Database - Select the name column in the SQL database that contains the data to be synchronized.

Attempt Type Mapping - Select:

- On to specify the type column in the source database for mapping to the iSupport type.

  Type Column from Source Database - Select the column in the source database to be used for mapping to the iSupport type.

  Create New Type if Mapping Fails - Select On to, if the value in the specified type column in the source database does not match, create a new CMDB type and assign it to the record.

Default Type if Mapping or Create Fails - Select the predefined iSupport CMDB type to assign if:

- No type is found on a record.
- The selected Type column contains any NULLs or empty strings for values for the mapped type.

Use the Create New and View/Edit options to access the Configuration Item Type screen.

- Off to assign the predefined iSupport CMDB type in the Default Type field as the CMDB type for all synchronized records.

  Default Type - If Off was selected in the Attempt Type Mapping field, select the predefined iSupport type to assign to all synchronized CI records. Use the Create New and View/Edit options to access the Configuration Item Type screen.

Attempt Status Mapping - Select:

- On to specify the status column in the source database for mapping to the iSupport status.

  Status Column from Source Database - Select the column in the source database to be used for mapping to the status in iSupport.

  Create New Status if Mapping Fails - Select On to, if the value in the specified status column in the source database does not match, create a new CMDB status and assign it to the record.

  Default Status if Mapping or Create Fails - Select the predefined iSupport CMDB status to assign if the status value in the source does not match or if a new CI status cannot be created. Use the Create New and View/Edit options to access the Configuration Item Status screen.

- Off to assign the predefined iSupport CMDB status in the Default Status field as the CMDB status for all synchronized CI records.

  Default Status - If Off was selected in the Attempt Status Mapping field, select the predefined iSupport status to assign to all synchronized CI records. Use the Create New and View/Edit options to access the Configuration Item Status screen.

Attempt Owner Mapping - Select:

- On to specify the names of the owner First Name, Last Name, and Email columns in the source database and search for a matching customer or support representative in iSupport.
- Off to assign a predefined iSupport customer or support representative (depending on what is selected in the Owner Type field) as the CMDB owner for all synchronized records.

  Owner Type -- Select:

  - **Customer** to specify the owner column in the source database for mapping to the iSupport owner.
  - **Support Representative** to specify the owner column in the source database for mapping to the iSupport owner.

  Owner First Name Column from Source Database - If On was selected in the Attempt Owner Mapping field, select the owner first name column in the source database to be used in the search for a matching iSupport customer or support representative (depending on what is selected in the Owner Type field).

  Owner Last Name Column from Source Database - If On was selected in the Attempt Owner Mapping field, select the owner last name column in the source database to be used in the search for a matching iSupport customer or support representative (depending on what is selected in the Owner Type field).

  Owner Email Column from Source Database - If On was selected in the Attempt Owner Mapping field, select the owner email column in the source database to be used in the search for a matching iSupport customer or support representative (depending on what is selected in the Owner Type field).

  Create New Customer Profile if Mapping Fails - Select:

  - On to create a new Customer Profile record if a value in the source database does not match.
  - Off to assign the customer in the Default Owner field as the owner of all synchronized CI records.

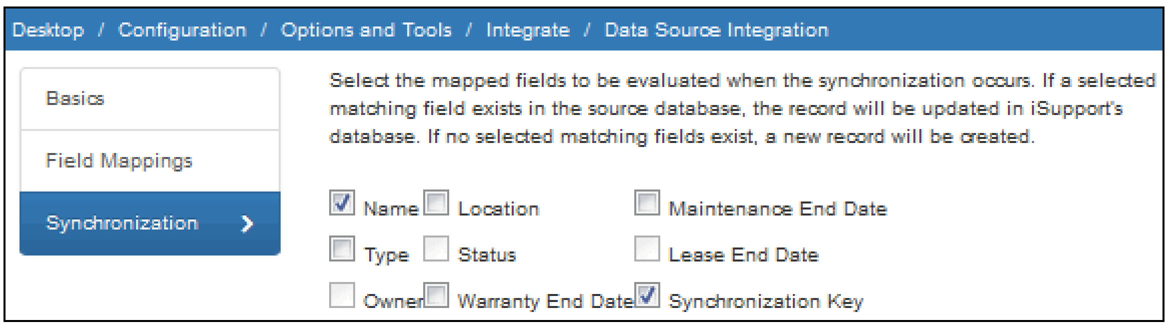
Default Owner - Select the iSupport customer or support representative to assign as the owner for synchronized records if no owner mapping was attempted or Off was selected in the Create New Customer Profile if Mapping Fails field,

When you make an entry in the Connection String and SQL Query fields on the Basics tab and click the Test Query button or Refresh Columns link, the SQL Columns section will be populated with the names of the columns in the source database. The iSupport Columns field contains iSupport's CMDB fields. To map a field, select a field in the SQL Columns field and the corresponding field in the iSupport Columns field. Then click the button. The associated fields display under Mapping. To remove an entry from the Mapping section, select the entry and click the button.

Use the Custom Fields tab to map fields in the source database to the custom fields set up for both CMDB types and the CMDB entry screen. Click Save to save your selections. The synchronization will occur when the Sync button is clicked and/or on the interval set in the Synchronization Interval field on the Basics tab.

Selecting Fields for Synchronization

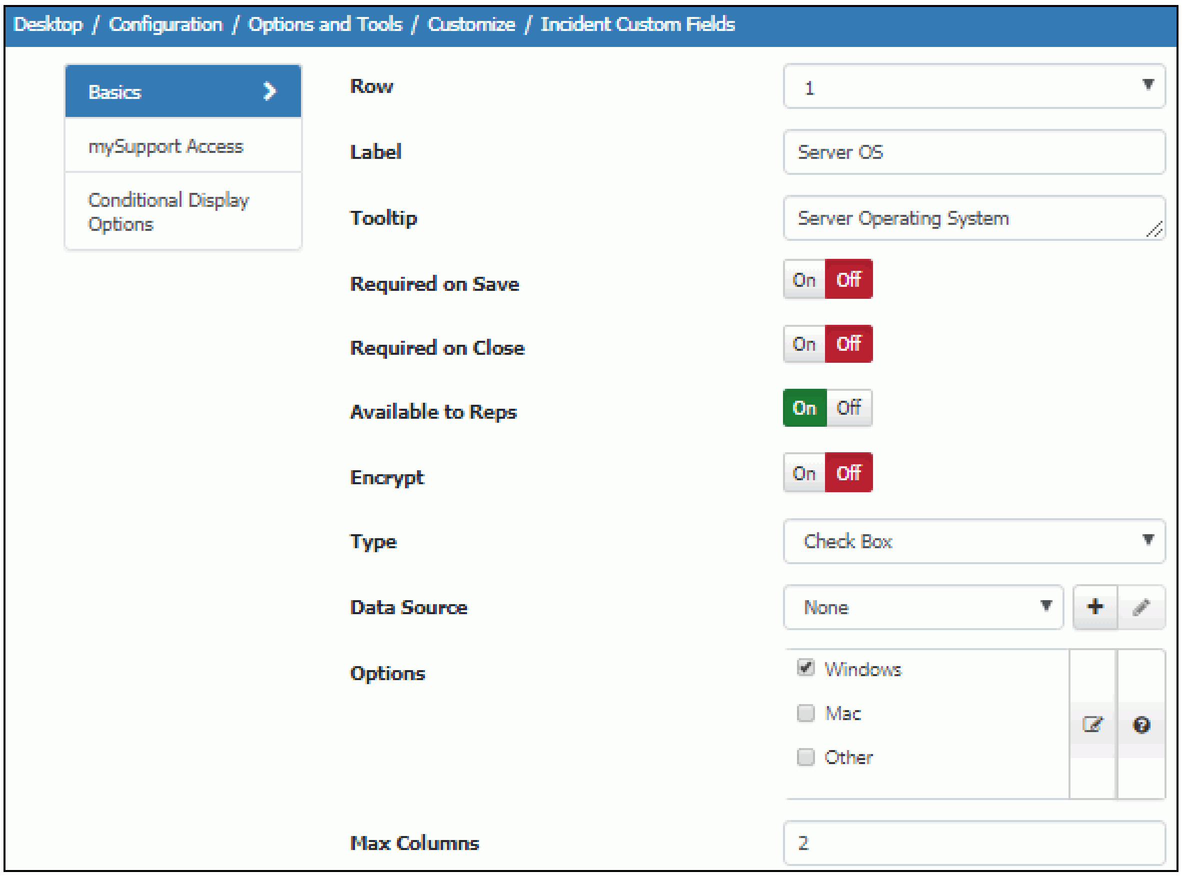
Use the Synchronization tab to synchronize iSupport's CMDB fields with fields in a Microsoft SQL Server source database; you'll select the mapped fields to be evaluated when the synchronization occurs. If a matching field exists in the source database, the record will be updated in iSupport.



Configuring Custom Fields

To define fields for entering information specific to your company, go to Options and Tools | Customize | Custom Fields. An unlimited number of text, keyword, hyperlink, date, selection, and date/time fields can be defined. You can do the following with custom fields:

- Require custom fields to be completed before a work item is saved and/or closed
- Configure display based on defined conditions, and pull from a data source
- Map to a SQL data source and populate and synchronize options for list-type custom fields
- Use rules to set a custom field value
- Configure custom fields to appear when an associated asset type, CMDB type, cost center, or category is selected; you can control display of these additionally defined fields in screen layouts. Note that all custom fields that have met any conditional display conditions will be created upon mySupport work item submission regardless of whether they are included on a mySupport submission layout.



Row - Enter the row number for the position of the field. Row one will be the first field, row two will be located under the first field, and so on.

Label - Enter the label for the custom field.

Tooltip - Enter the text to display when a user hovers over the field with the cursor.

Required on Save - Select On to require the field to be completed before the record can be saved. Note: If an inbound email rule uses an auto-close incident template and a required custom field does not have a default value, the required custom field will not have a value in the closed incident.

Required on Close - Select On to require the field to be completed before a Closed status can be selected in a work item.

Available to Reps - Select Off to prevent support representatives from editing the field. (However, rules can change field values.)

Encrypt - If your business has a specific mandate regarding column level encryption and you are already using 'database at rest' encryption, send a request to iSupport's Technical Support department for a feature unlock code.

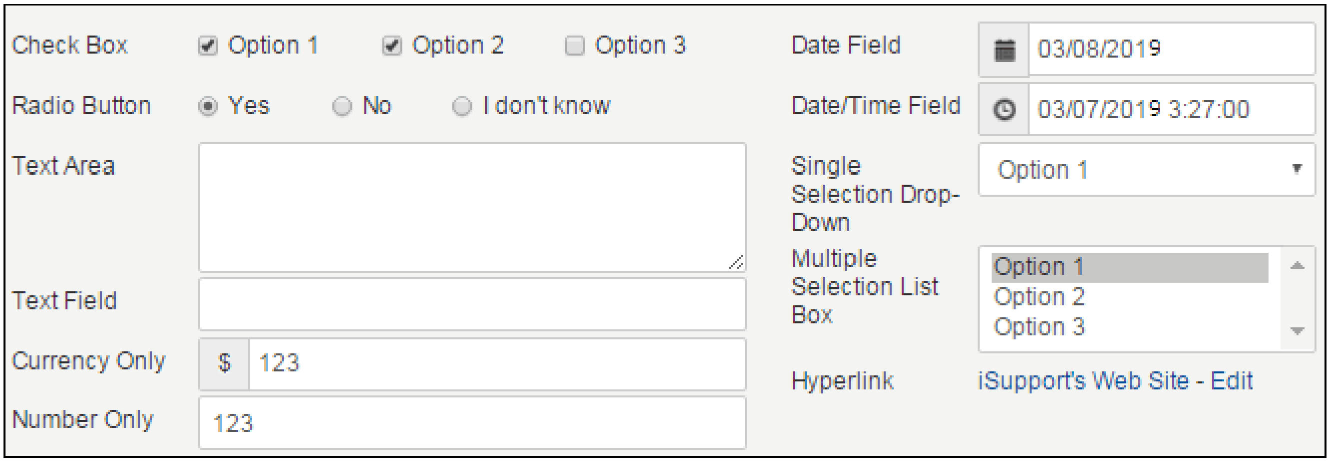
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see "Pulling From a Data Source" on page 28 for more information.

- A **Check Box** field enables multiple selections; use the Max Columns field to enter the number of check boxes to appear before a scroll bar is used.
- A **Currency** field displays a dollar sign next to the field and allows entry of the numbers 0 through 9, a decimal point, and two values after the decimal point. The dollar sign symbol that precedes a currency custom field is controlled by the server's default language, but you can override it via a setting in the web.config file (located in the directories in which the Desktop, mySupport portal, and Survey functionality are installed). The following tag in the web.config file defines globalization settings: <globalization requestEncoding="utf-8" responseEncoding="utf-8"/>

  You can add a culture/language name setting to this tag to override the currency symbol; in the example below, *culture="en-GB"* was added to change the dollar sign symbol to the English (United Kingdom) pound symbol. <globalization requestEncoding="utf-8" responseEncoding="utf-8" culture="en-GB"/>

  Note that the settings in the web.config file should be updated only as directed (via this guide or iSupport Technical Support); failure to do so may result in data loss or corruption. See http://msdn2.microsoft.com/en-us/library/system.globalization.cultureinfo.aspx for more information on defined culture settings.
- A **Date** field enables entry or selection of a date in MM/DD/YY format; a **Date Time** field enables entry or selection of a date (MM/DD/YY) and time. To disable manual entry in Date and Date Time fields and require the user to select from the calendar popup, select Yes in the Disable Manual Entry of Date Time Custom Fields field on the Advanced tab in the Custom Fields list screen.
- A **Hyperlink** field enables you to specify default text and a URL to appear in the field; the user can change those entries. You can also leave the field blank and allow the user to enter the default text and URL.
- A **Label Only** field does not display a value option; you can use it as a section header to group custom fields.
- A **Multiple Selection List Box** field enables the user to select multiple entries in a list. Use the Max Rows field to enter the number of selections to appear before a scroll bar is used.
- A **Number Only** field enables entry of the numbers 0 through 9 and a decimal point.
- A **Radio Button** field enables only one selection; use the Max Columns field to enter the number of radio buttons to appear before a scroll bar is used.
- A **Single Selection Drop-Down** field enables selection of one item in a list.
- A **Text Area** field enables text characters to be entered in a resizable field.
- A **Text** field enables text to be entered in a one-line field.
- A **Type Ahead** field initiates a search of matching options after a few characters are typed. This custom field type is only used for fields that are linked with a data source.

Examples are shown below.



Options - This field displays when creating a radio button, checkbox, multiple selection list box, or single selection drop-down. Enter or paste items into this field; separate each value with a comma or return and select ✔ Commit Items when finished. Select items to specify defaults and drag items to change the order. Options can be populated by and synchronized with a SQL data source; see "Pulling From a Data Source" on page 28 for more information.

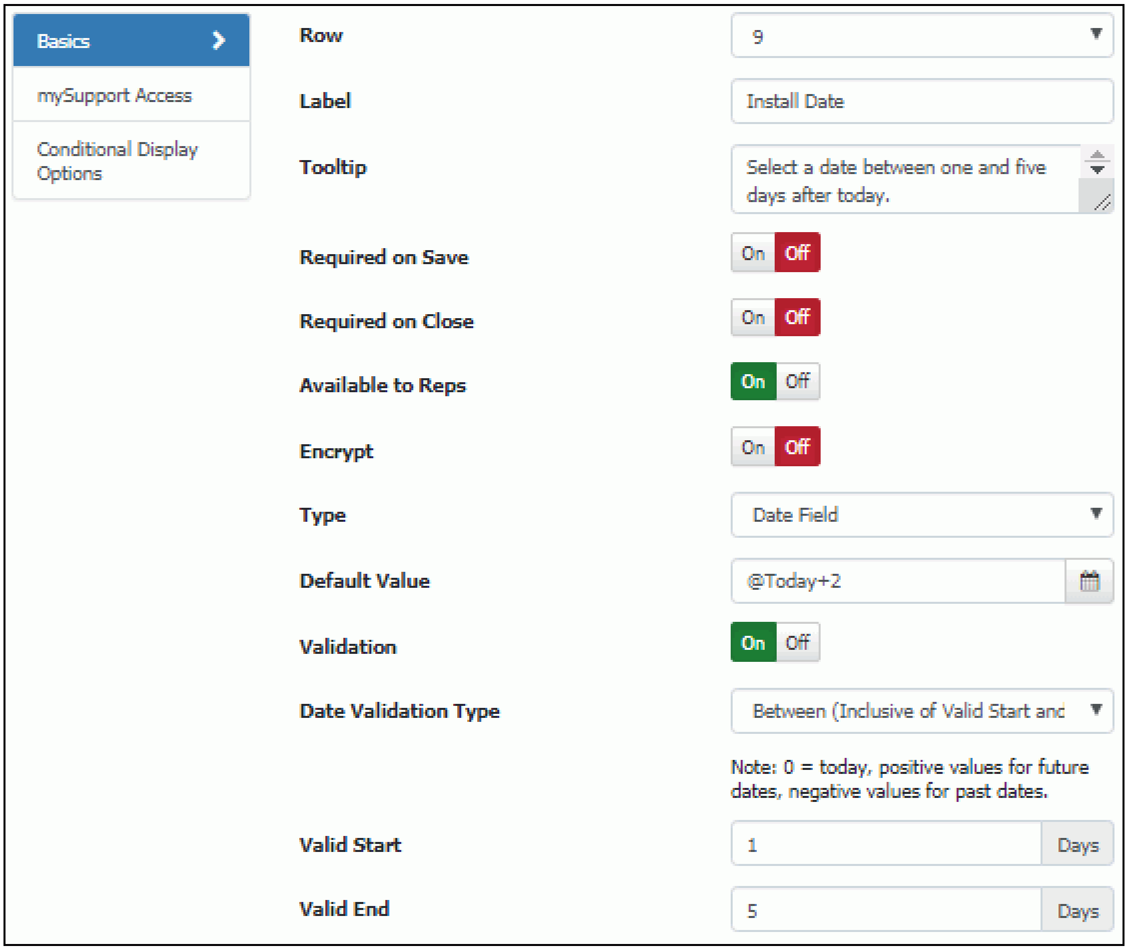
Default Value - Enter a value to appear as an option in the custom field by default.

- To display the current date, enter **@today**
- To display the date a specified number of days after the current date, enter **@today+n** (where *n* is the number of days to add after today's date)
- To display the date a specified number of days before the current date, enter **@today-n** (where *n* is the number of days to subtract from today's date)

Max Columns/Max Rows - For Check Box and Radio Button type fields, enter the maximum number of columns to display (the fields will wrap to multiple rows); for a Multiple Selection List Box type field, enter the maximum number of rows to display (causing a scroll bar to appear).

To delete a custom field, select the row number and then select the Delete link. To delete multiple custom fields, select the fields and select the Delete link. To edit a custom field, select the label link.

Validation - This field appears for Date, Date/Time, Currency, Text Area, and Text custom fields. Select On to enable date, date/time, currency, text area, and text custom fields to be validated upon entry (for example, the calendar picker will only make available valid dates for selection). Enter the parameters that the field will be validated against; the parameters will vary depending on the type of field.



- **Date:** The calendar picker will only make available valid dates for selection by the user. Use the Date Validation Type field to specify the basis for validation and then enter the number of days before or after the current date on which to make available dates. Use zero as the current date, positive values for future dates, and negative values for past dates.

  Select **Start** in the Date Validation Type field to ensure that the available dates for selection will be on or after the specified number of days from the current date. Examples:

  - If you enter -2 in the Valid Start field, the dates available for selection will start two days before the current date.
  - If you enter 0 in the Valid Start field, the dates available for selection will start on the current date.
  - If you enter 1 in the Valid Start field, the dates available for selection will start one day after the current date.

  Select **End** in the Date Validation Type field to ensure that the available dates for selection will be on or before the specified number of days from the current date. Examples:

  - If you enter -2 in the Valid End field, the dates available for selection will end two days before the current date.
  - If you enter 0 in the Valid End field, the dates available for selection will end on the current date.
  - If you enter 1 in the Valid End field, the dates available for selection will end one day after the current date.

  Select **Between** (Inclusive of Valid Start and Valid End) to ensure that the available dates for selection will be a range: starting on or after a specified number of days from the current date, and ending on or before a specified number of days from the current date. (Your entry in the Valid Start field must be less than or equal to the number of days in the Valid End field.) Examples:

  - If you enter -2 in the Valid Start field and 2 in the Valid End field, the dates available for selection will start two days before the current date and end two days after the current date.

- If you enter 1 in the Valid Start field and 3 in the Valid End field, the dates available for selection will start one day after the current date and end three days after the current date.

- **Date Time:** The information above applies to this field; use the Validation Start Time and Validation End Time fields to select available times on the available days for selection.
- **Currency:** Enter a minimum amount in the Min Amount field, a maximum amount in the Max Amount field, or a minimum and maximum in both fields to specify a range. (Your entry in the Min Amount field must be less than or equal to the number in the Max Amount field.)
- **Number Only:** Enter a minimum amount in the Min Amount field and a maximum amount in the Max Amount field; the number the user enters must between the two numbers. (Your entry in the Min Amount field must be less than or equal to the number in the Max Amount field.)
- **Text Area/Text:** Enter a minimum number of characters in the Min Length field or a maximum number of characters in the Max Length field. Enter numbers in both fields to specify a range. (Your entry in the Min Length field must be less than or equal to the number in the Max Length field.)

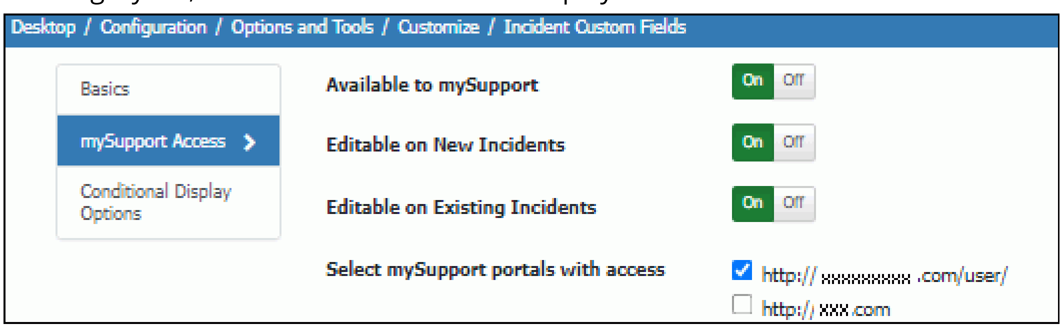
mySupport Access Options

Available to mySupport - Select On to enable the field to appear on a mySupport portal.

Editable On New Incidents - This field appears if Hyperlink is selected in the Type field on the Basics tab. Select On to enable the Edit link for Hyperlink-type custom fields on mySupport. Note: On is the default value; when off, the default text and URL are validated and the Edit link is hidden in mySupport.

Editable On Existing Incidents/Changes - Select On to enable the custom field to be edited by customers with the mySupport Custom Fields Editor permission. Note that you can use the Allow Edit field in the Configure Field dialog for custom fields on mySupport display layouts to disable/enable an individual Customer Profile custom field to be edited by customers with the mySupport Custom Fields Editor permission.

Select mySupport Portals with Access - If the mySupport Access field is enabled, select the predefined mySupport portal interfaces on which the custom field can appear. Note: If custom fields are associated with more than one level of a selected category set, the fields for all levels will display.

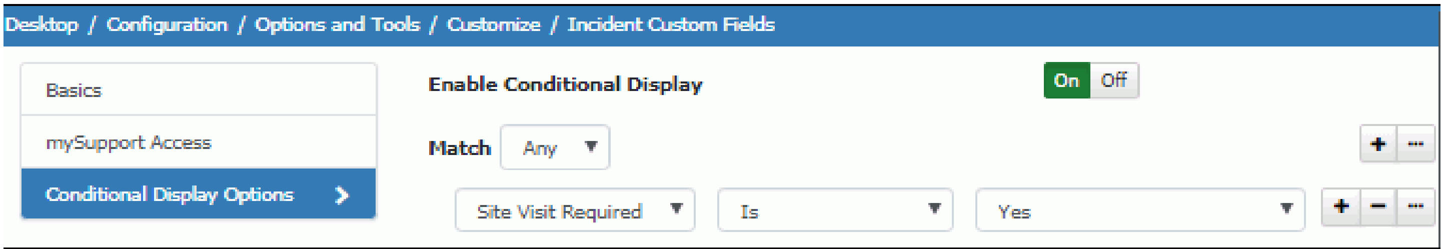


Setting Advanced Options

Disable Manual Entry of Date Time Custom Fields - Select Yes to require that users only select from the calendar popup for Date and Date Time custom fields.

Conditional Display Options

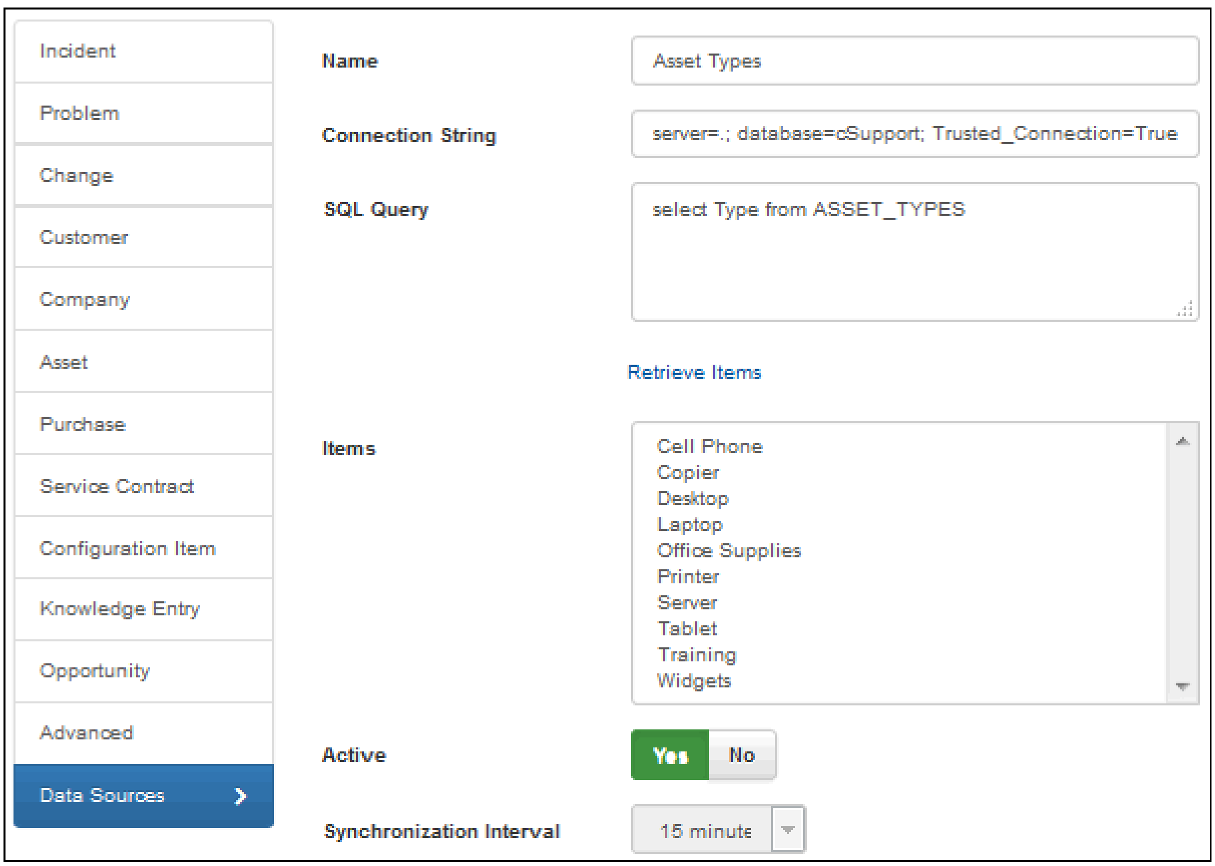
Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.



Use the Match *<All/Any>* field to specify whether you want **every** *<field>* is *<value>* search condition to be met, or **any** configured condition to be met. Use the + Add Condition and − Remove Condition options to display and remove a *<field>* is *<value>* search condition. Select the + Add Condition option if you wish to include another condition. You can use the ··· Add Condition Group option to put a set of search conditions to be evaluated together in a group.

Pulling From a Data Source

You can map to a SQL data source and populate and synchronize options for list-type custom fields. Use the Data Sources tab in the Custom Fields screen to create a custom field data source definition, enter a connection string and SQL query, and specify the synchronization interval.



Name - Enter a name for the SQL Server source definition. This name will appear in the list that can be selected in the Data Source field in the Custom Field Definition dialog (if a list-type format is selected in the Type field).

Connection String - Enter the connection string for accessing the source database.

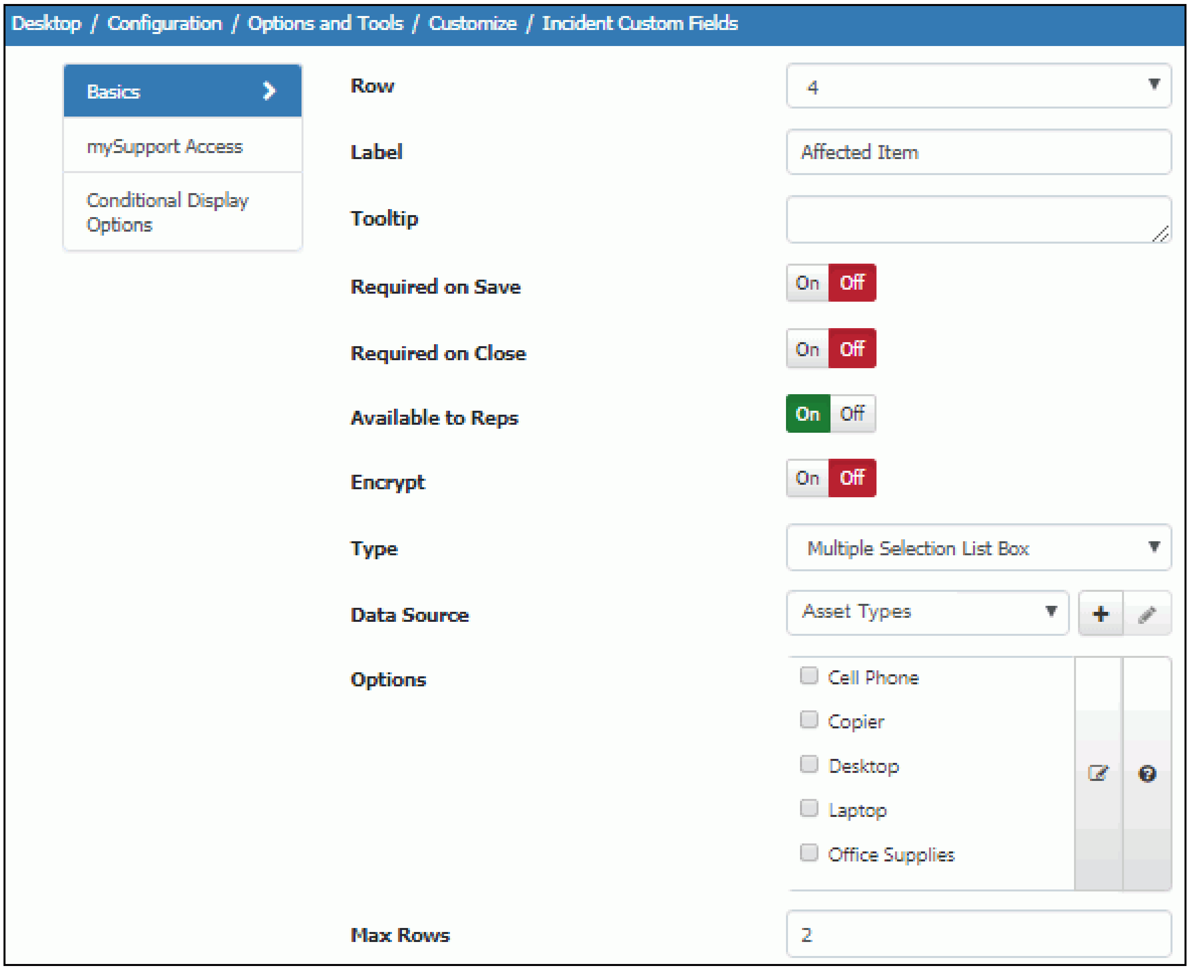
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Select the Retrieve Items button to populate the Items field using this string.

Active - Select Yes to enable synchronization and update the Options list for a custom field with the information in the SQL source database.

Synchronization Interval - Select the number of minutes in the interval for the synchronization to be performed.

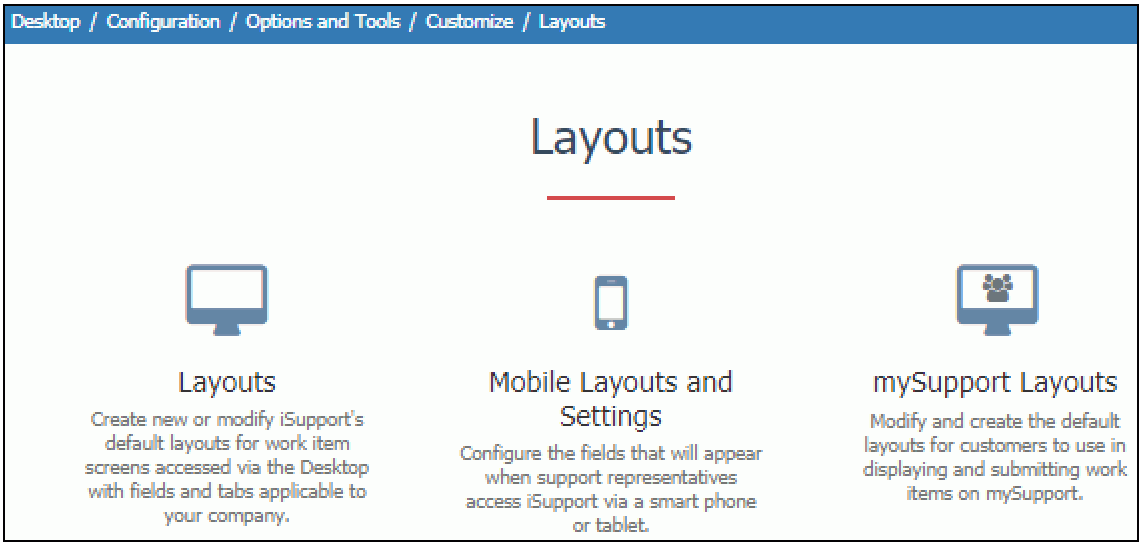
Using the Data Source for a Custom Field

After saving, the custom field data source definition will be available for selection in the Custom Field Definition dialog. The Options field will be populated and will not be editable after synchronization.



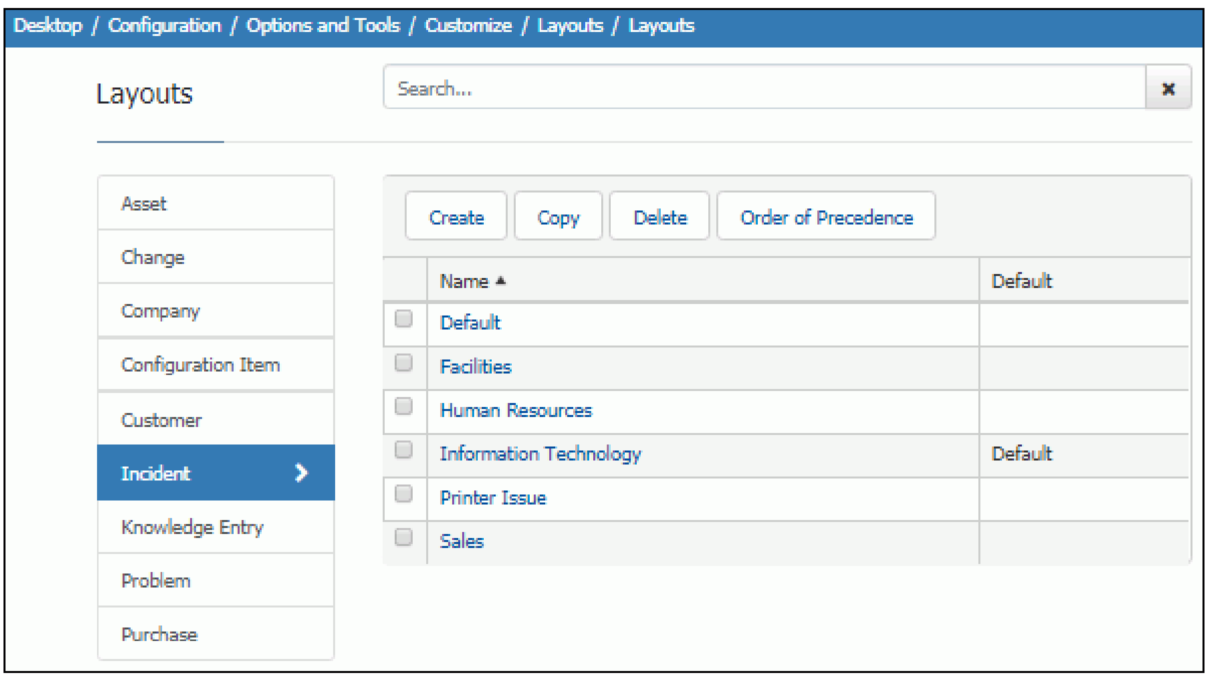
Configuring Screen Layouts

iSupport includes default layouts for the entry screens used by support representatives, the display and submit screens used by customers on the mySupport portal, and for the mobile HTML5 interface. Use the Layouts screens to modify these layouts and/or create new ones with fields and tabs that are specific to your company.



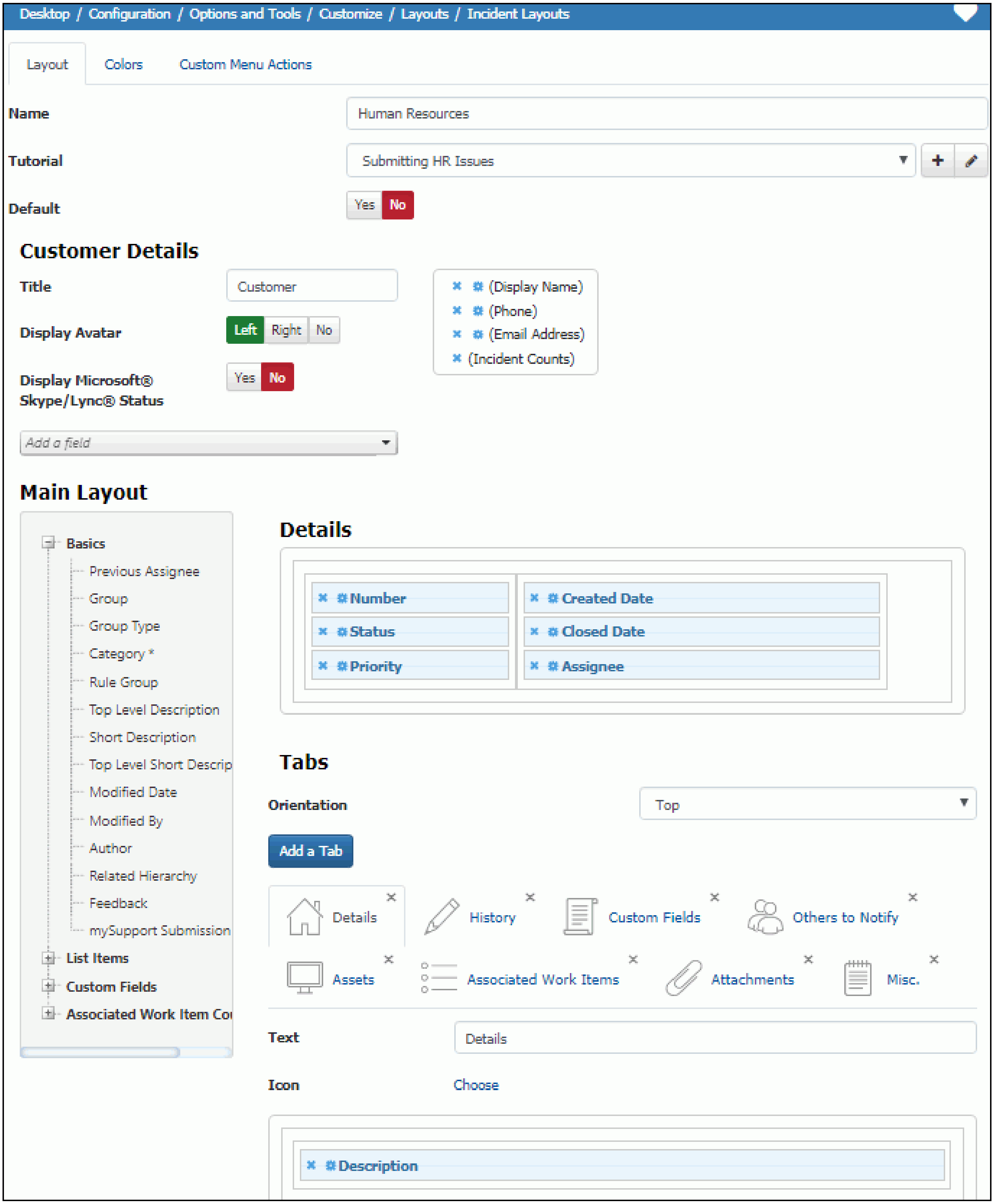
Note that only layouts configured via the Global Settings | Mobile Settings screen will apply to the mobile HTML5 interface. Also, mySupport Customer layouts will appear when the customer selects the View Complete Profile button in the Account Settings screen on a mySupport portal.

You could create layouts based on different types of users, different types of work, etc.



You can assign different layouts to different asset and configuration item types (SD Edition), and you can assign different incident, problem, and change layouts to support representative groups, customer groups, categories. For incidents and changes, you can assign different layouts to templates and hierarchy templates. More than one layout may be applicable to incidents, changes, and assets; for example, if a layout is associated with the logged in rep's primary group as well as with the selected category for an incident. Use the **Order of Precedence** link on the those list screens to specify which layout to use when more than one reference is applicable.

The Layout screen is shown below.



Use the **Tutorial** field to associate a tutorial that will display the first time the support representative accesses a screen with the layout. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can select to display an additional screen of content. Use the Create New and View/Edit options to access the Tutorials screen to create a tutorial or view/modify the selected tutorial; see the online help for more information. In that screen you can associate a tutorial with entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards.

Select Yes in the **Default** field to display the layout if none is associated with current support representative group, customer group, category, incident template, or hierarchy template.

For Rep Client layouts, you can use the Preview button at the bottom of the Layout screen after adding required fields to the form to display your layout. You'll need to select a record to use for displaying field data.

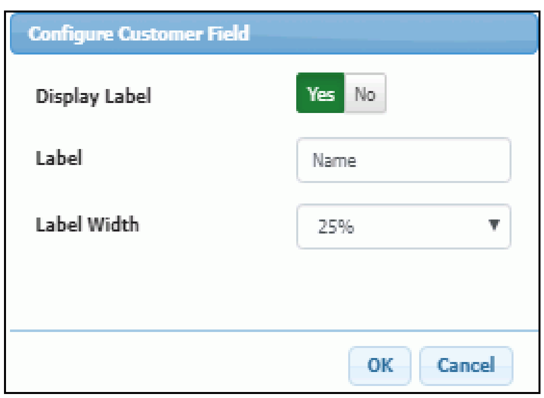
Configuring Customer Details

Rep Incident and Change Screens

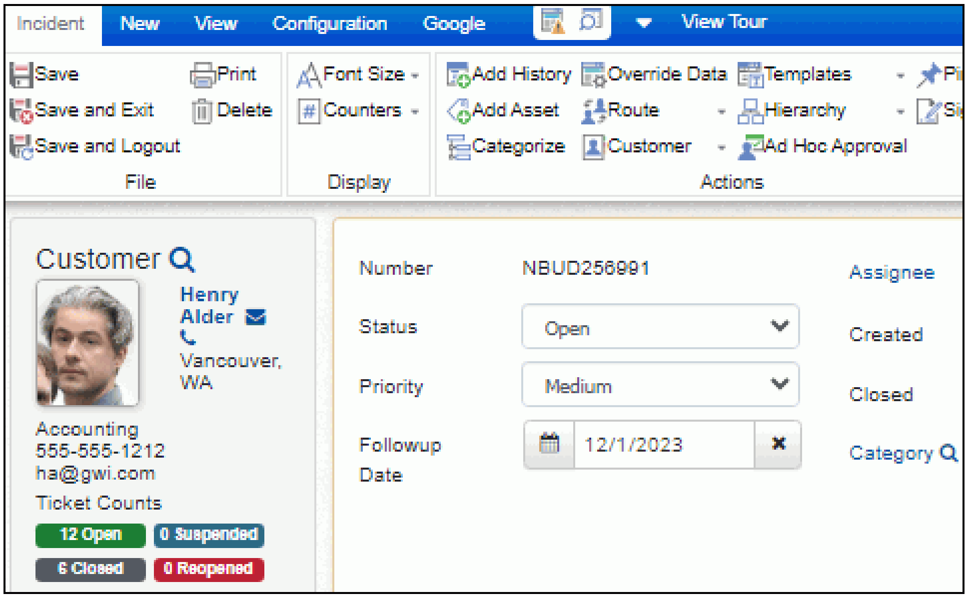
The Customer Details section will appear in the Rep Incident and Change Layout configuration screens as shown below.

Use the **Title** field to customize the text to appear to the left of the search icon in the customer section; "Customer" will appear by default.

To include the customer's avatar (uploaded via the Customer Profile screen or the mySupport portal), select Left or Right in the **Display Avatar** field. Use the Add a Field dropdown to select the fields to appear in the upper left Customer area at the top of the Incident screen. After adding a field, select Configure Field to enable or disable the field label, enter the field label, and select the field label width (which is a percentage of the column in which the field is included).



Note that the **Ticket Counts** field will include Open, Closed, Suspended, and Reopened links in the Customer section of the Incident screen as shown in the example below.

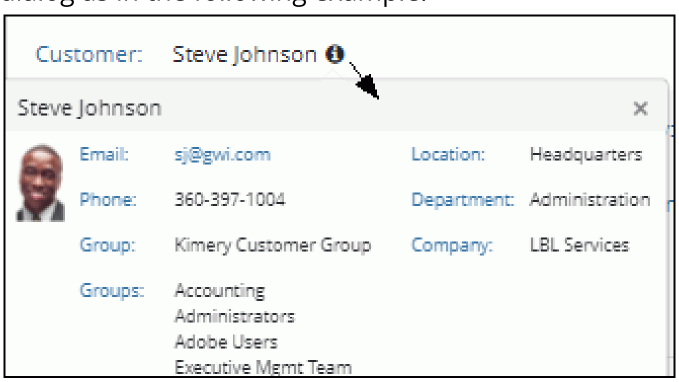


Use the **Display Microsoft® Skype/Lync® Status** field to include an icon that will display the Microsoft Skype/Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Skype/Lync functions. In order for the icon to appear, Microsoft Skype or Lync 2013 or later must be installed on your system, the support representative viewing the incident must be using Internet Explorer 10 or 11, and iSupport must be in the intranet or added to trusted sites.

mySupport Incident and Change Screens

There are two methods to include fields for customer information on mySupport portals:

- The Customer field under the Basics section; this includes an information option next to the customer's name which will display a popup dialog as in the following example:

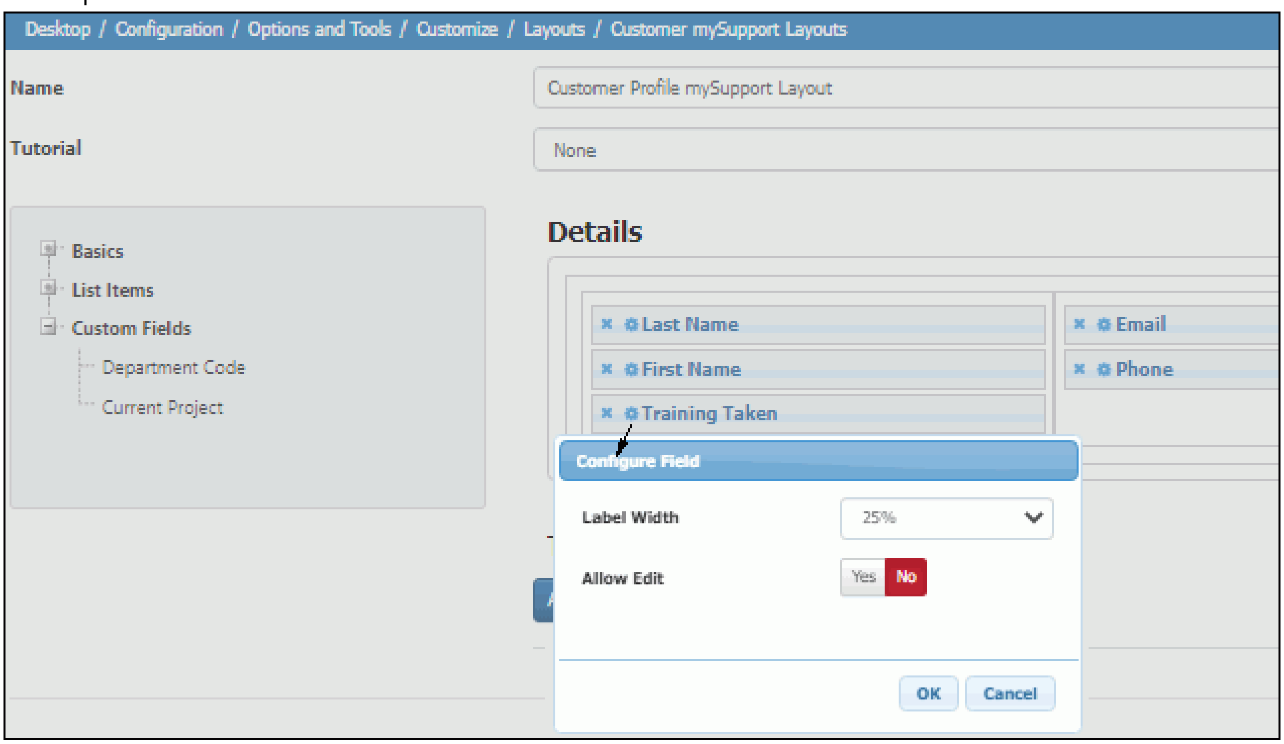


- Individual fields under the Customer Fields section

Note that the Customer Group field will display the customer's primary group, and the Customer Groups field will display all of the groups in which the customer is a member.

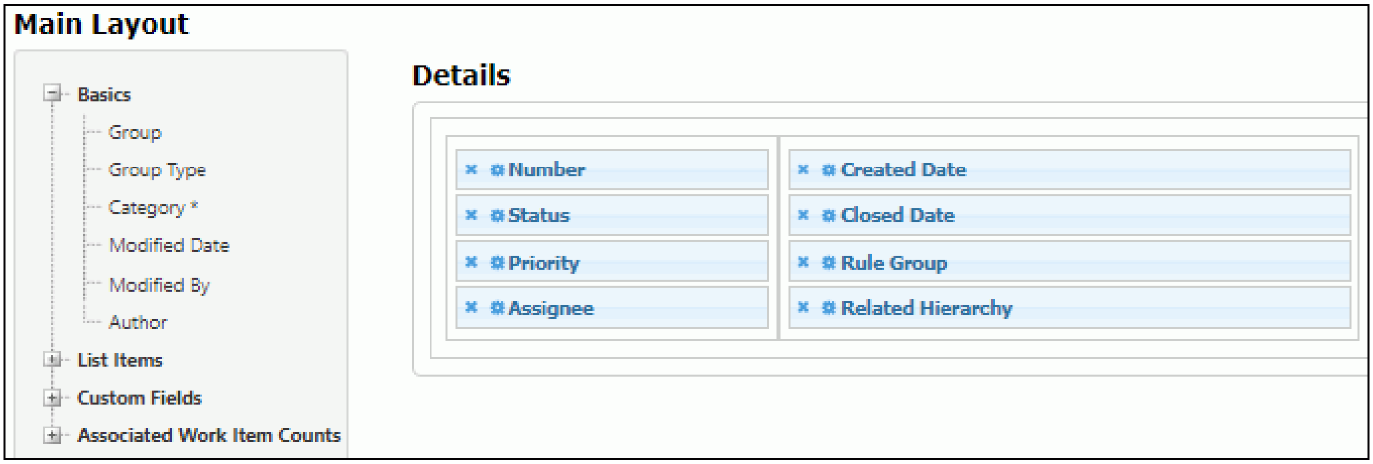
mySupport Customer Profile Custom Field Edit Access

You can use the Allow Edit field on the Configure Field dialog for custom fields on mySupport display layouts to disable/enable an individual Customer Profile custom field to be edited by customers with the mySupport Custom Fields Editor permission.

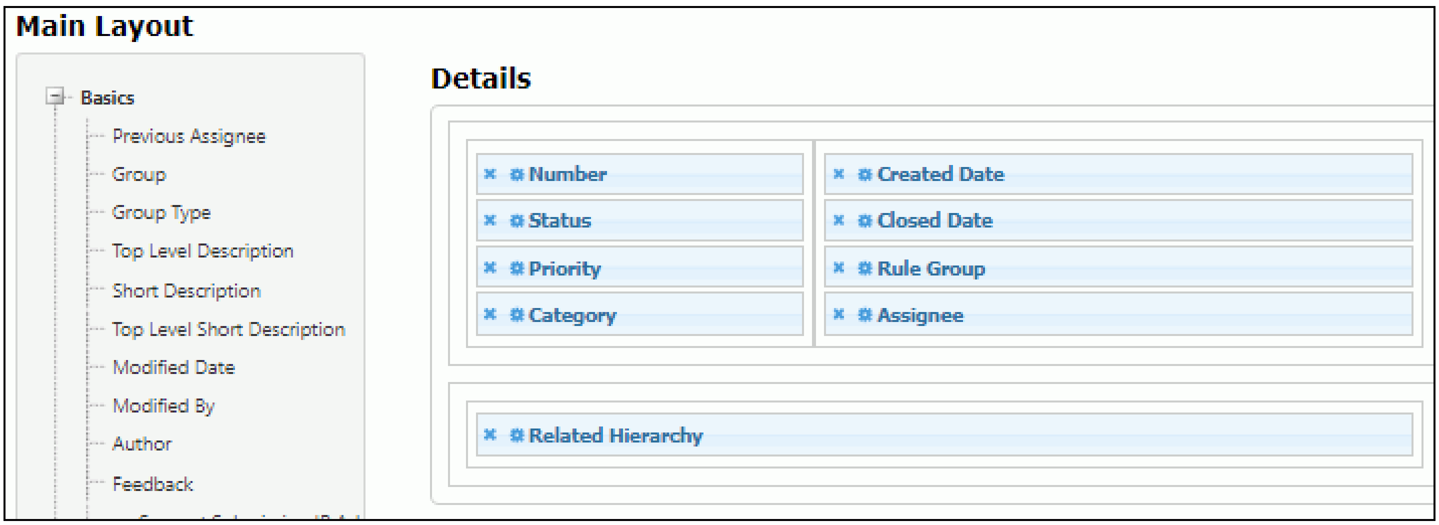


Adding Fields and Tabs

To configure the Details section in the upper right section of the resulting screen, drag fields from the selector on the left to the middle of the Details area on the Layout screen. Required fields are designated with an asterisk in the selector on the left.

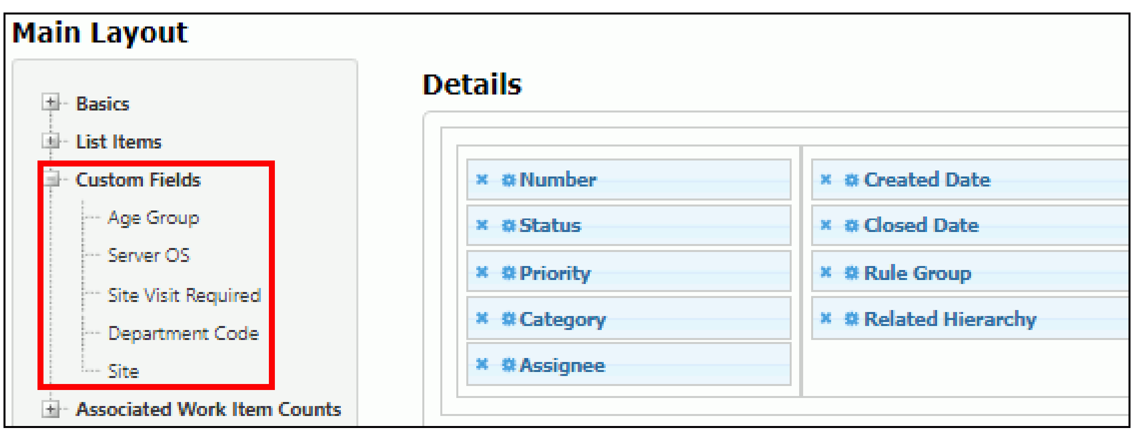


You can drag a field to the lower part of the Details section to create a subsection for a field.

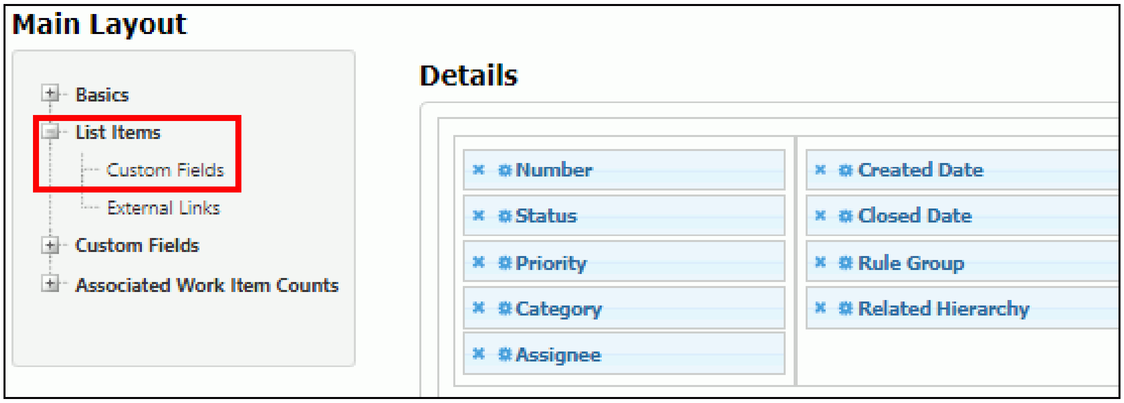


Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, or CI type. To include custom fields on a layout, you can:

- Drag the applicable global custom fields under the Custom Fields section individually:

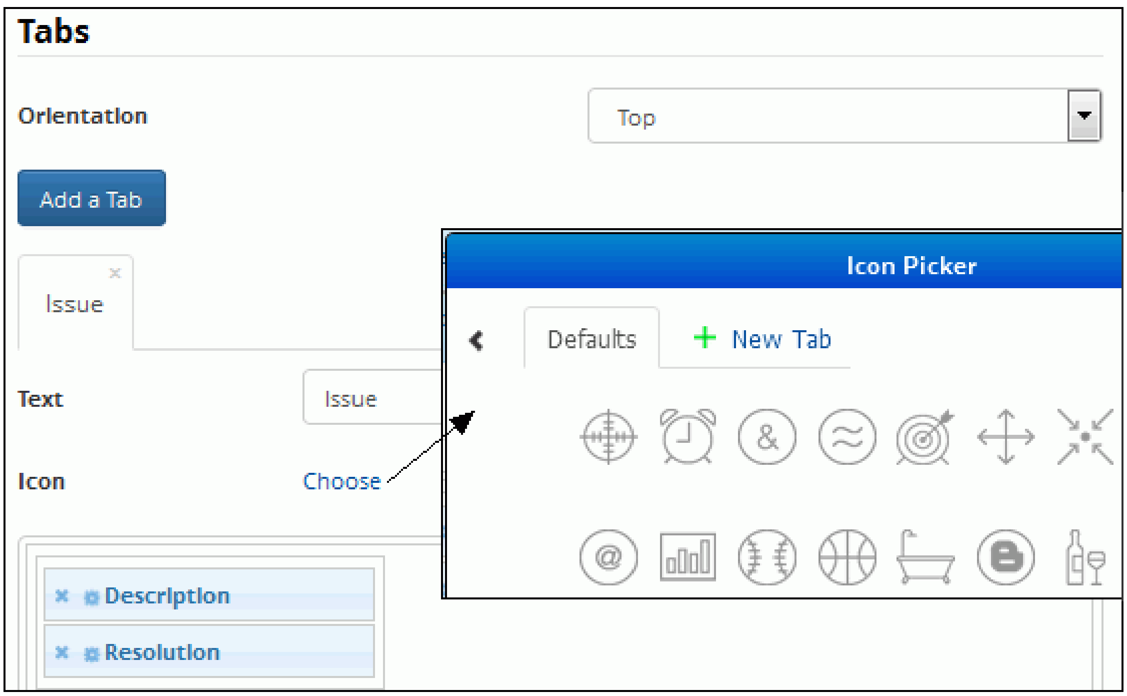


- Drag the Custom Fields field under the List Items section and then select Configure Field to display the Configure Field dialog and select the types of custom fields to include: global custom fields, additionally defined custom fields, or both. See “Configuring Fields” on page 37.

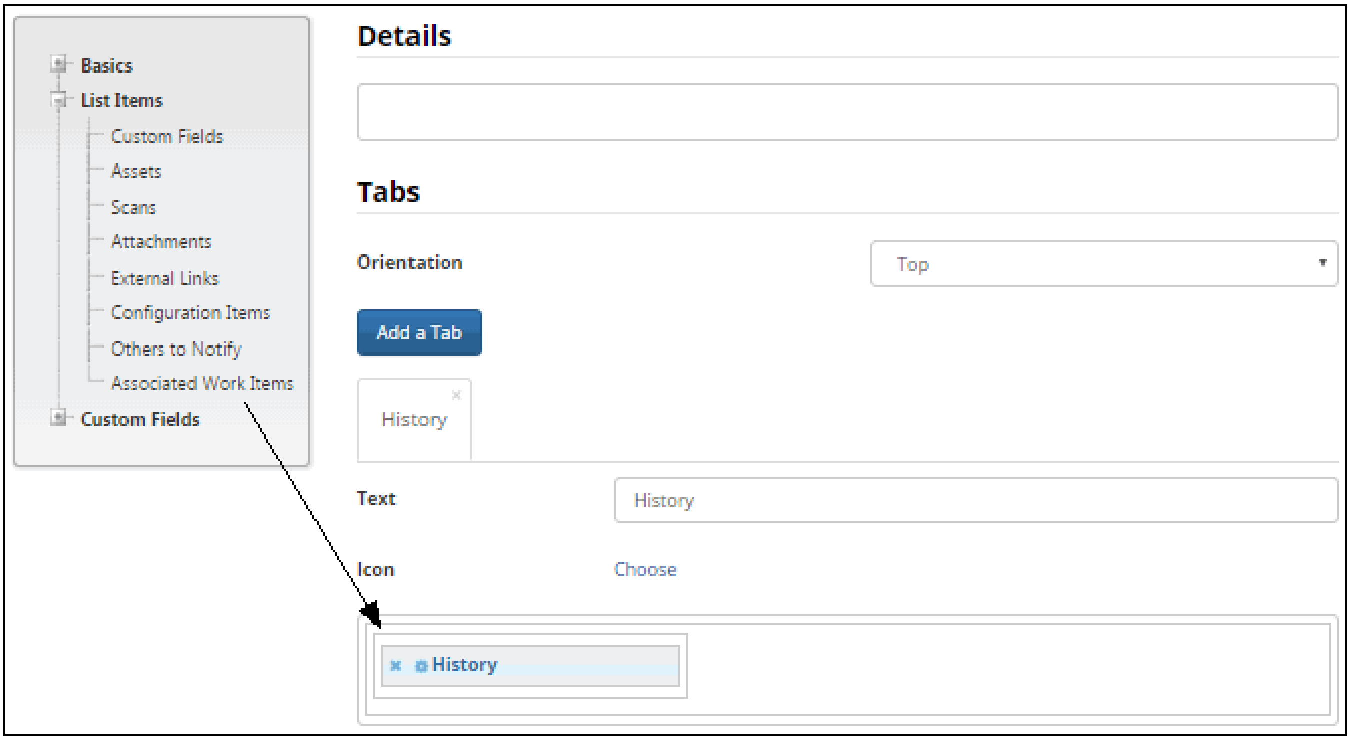


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if you include it in your layout, the default Save button will still be retained at the top of the Submit screen.

Tabs can display in a row above fields or to the left of fields on the lower half of the resulting screen. To add a tab, select the Add a Tab button and then select on the new tab (named "Tab" by default). Use the Text field to enter the label for the tab. Select the Choose link in the Icon field to select a default or custom image to appear to the left of any text entered as a label. (If no text is entered, only the selected icon will appear.)



To add fields to the tab, drag fields from the selector on the left side of the Layout screen to the middle of the section below the Icon field.

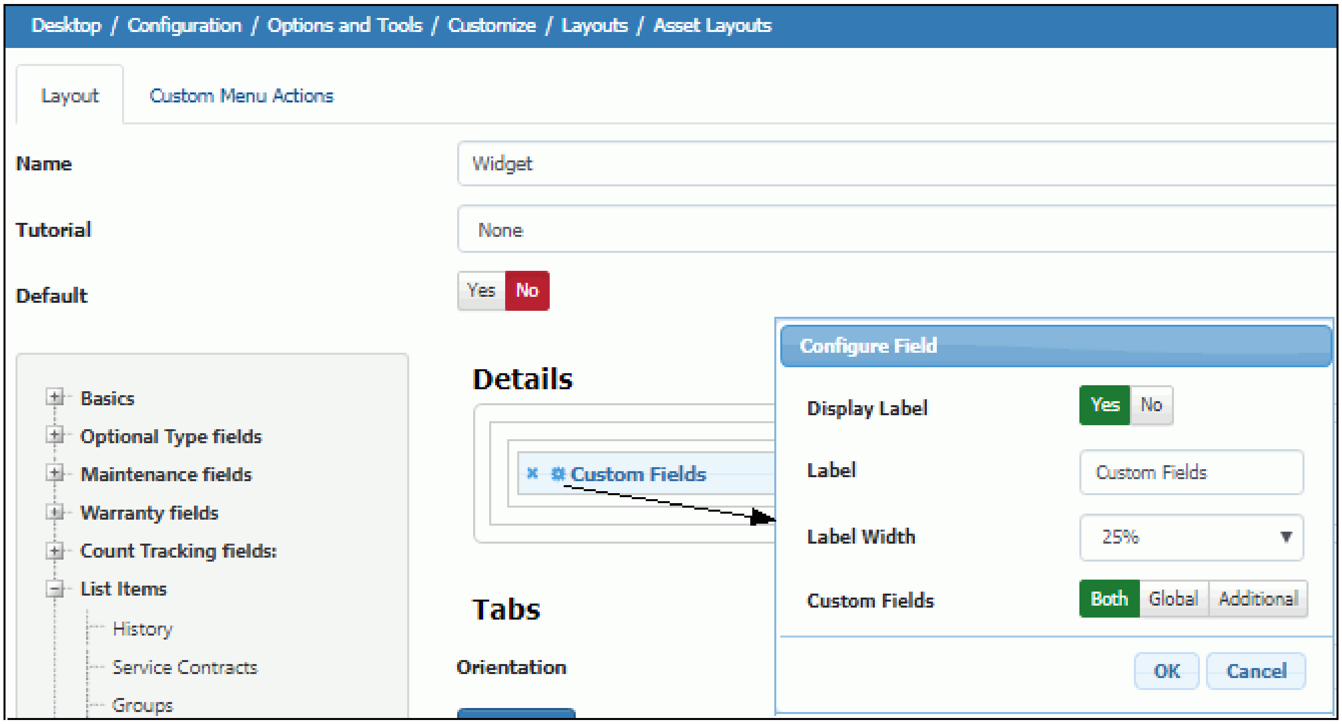


Note: The Description field is optional on mySupport incident submit layouts. The following text will be included in the Description field after submission: "Description field not included in <layout name> mySupport incident submit layout." If the layout is associated with a template, the description configured in the template, if any, will be used.

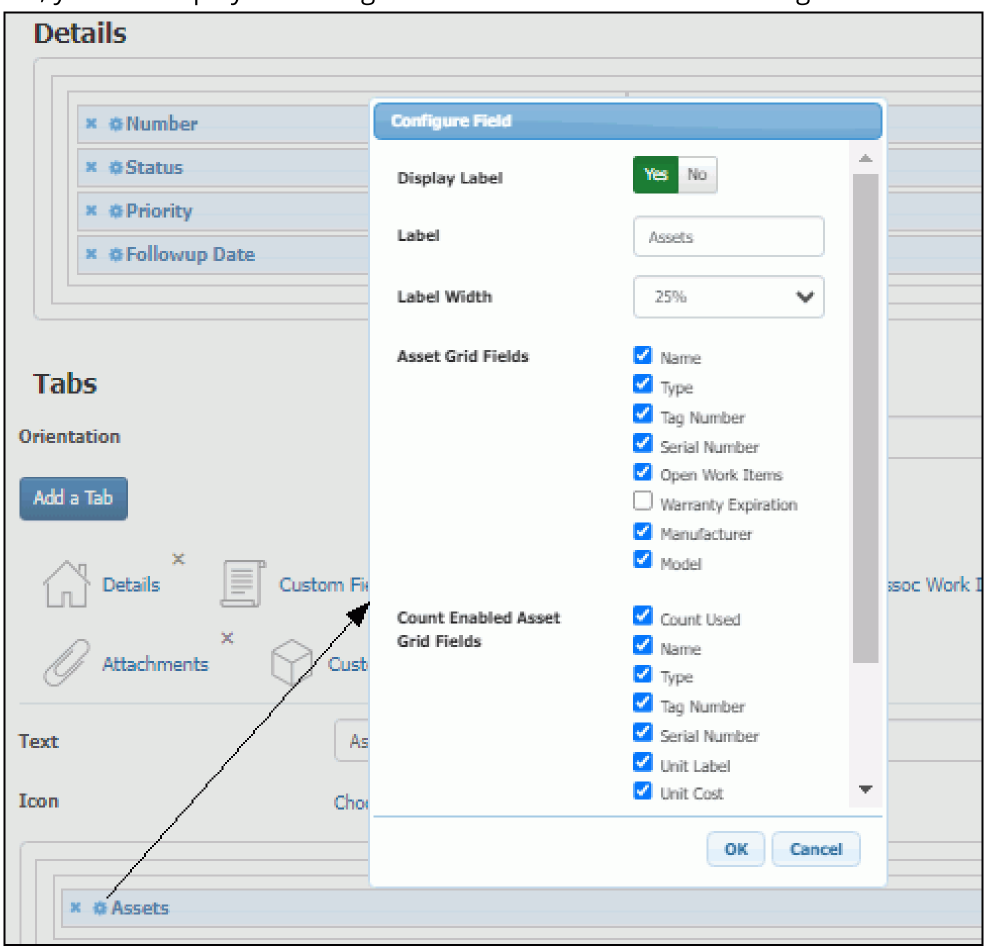
Configuring Fields

After adding a field, select Configure Field to enable or disable the field label, enter the field label, and select the field label width (which is a percentage of the column in which the field is included). Note that the label width will not be applicable on list fields that display a label above the field.

Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, change type, CI type, and cost center. When you drag the **Custom Fields** field under the List Items section to include all of the custom fields at once, you can control which types of custom fields to include on layouts: global custom fields, additionally defined custom fields (defined for a category, asset type, CI type, change type, or cost center), or both. Note that all custom fields that have met any conditional display conditions will be created upon mySupport work item submission regardless of whether they are included on a mySupport submission layout.

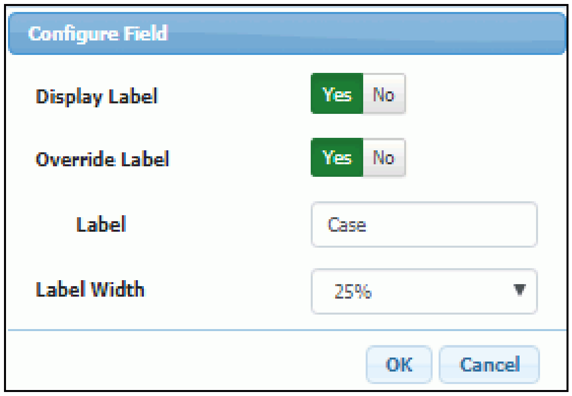


For work item layouts, you can display an asset grid for the Asset field via the Configure Field icon:

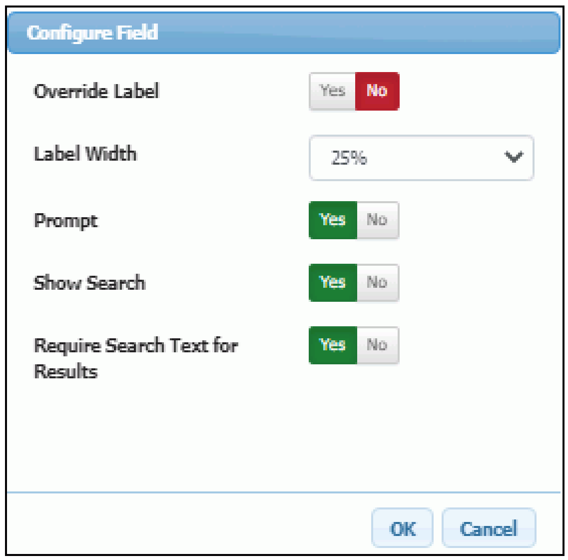


mySupport Layouts

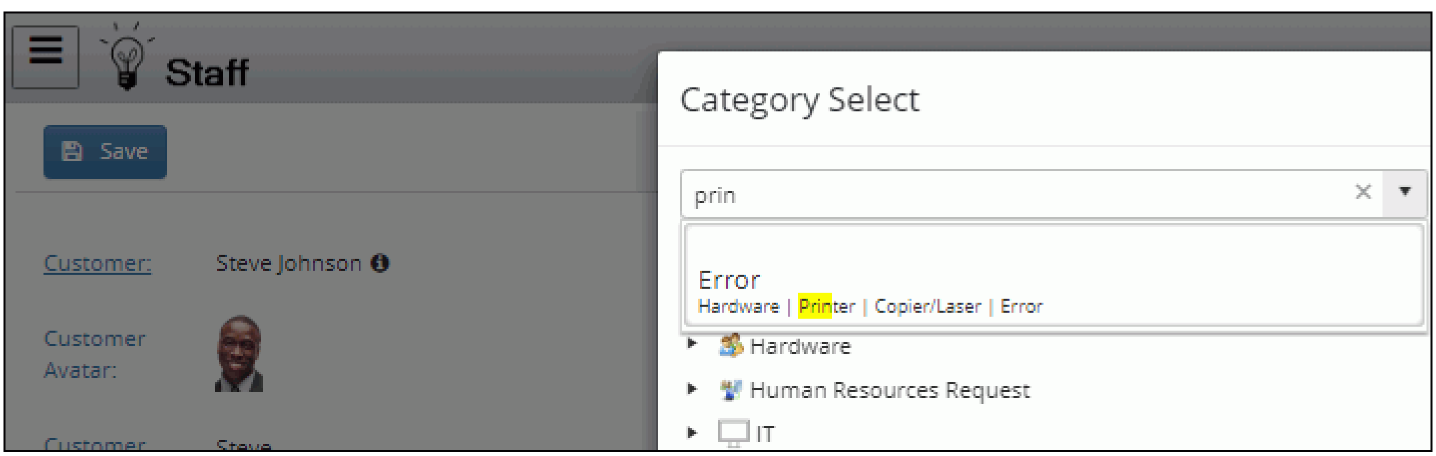
- Select Yes in the **Override Label** field to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



- If configuring the **Category** field:

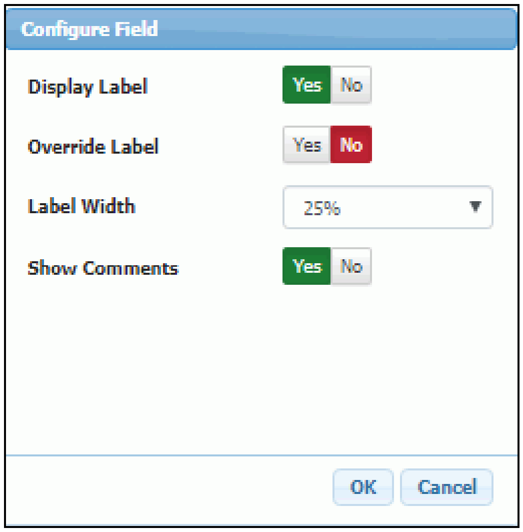


  - Select Yes in the **Prompt** field to initially display the Category Select dialog when the Incident or Change Submit screen appears.
  - Select Yes in the **Show Search** field to include a search field in the Category Select dialog.



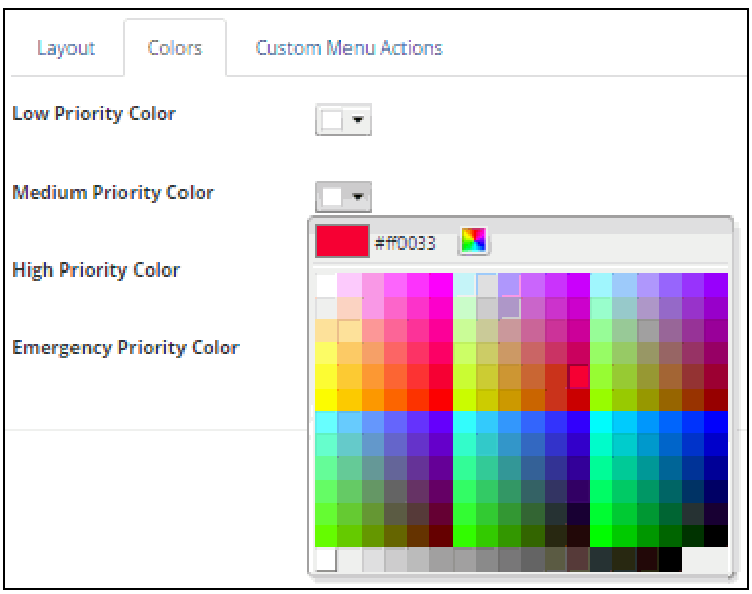
  - Select Yes in the **Require Search Text for Results** field to prevent display of the results until the user has started typing.

- If including the Assets list field, select Yes in the **Show Comments** field to control display of the Comments field that may be included (depending on the asset type).



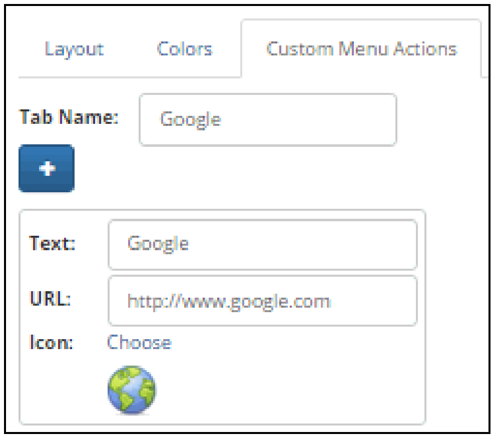
Configuring Priority-Based Background Colors

Use the Colors tab to configure the priority-based background colors for the upper portion of the Incident, Problem, and Change screens. You can choose from the color picker or input an HTML color code.

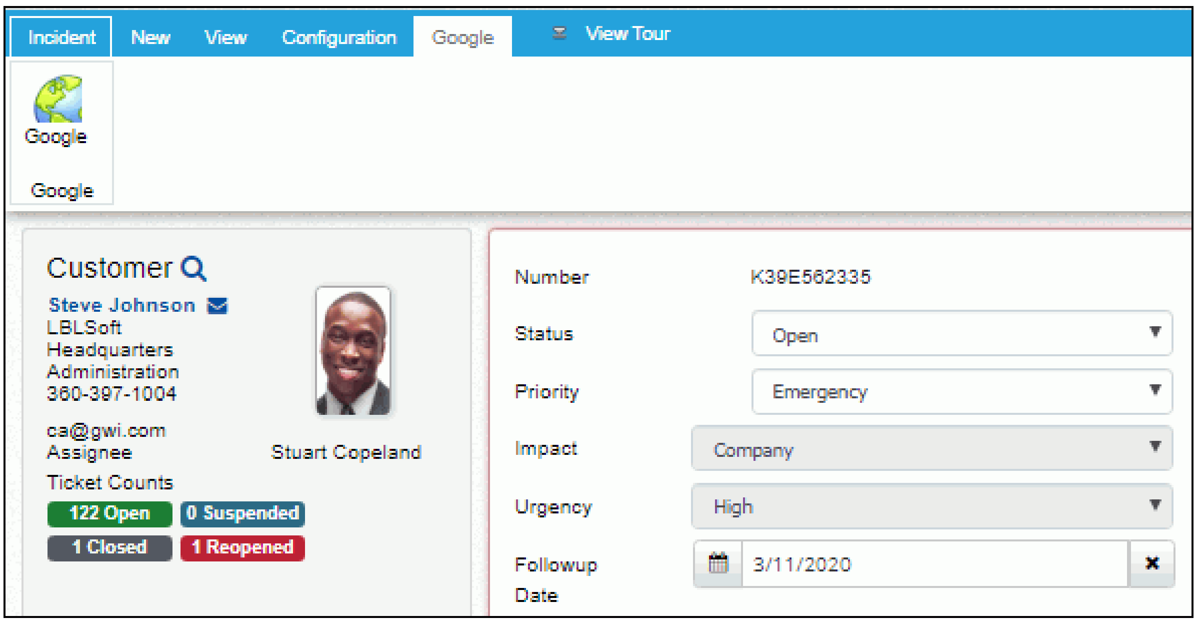


Configuring Custom Menu Actions

Use the Custom Menu Actions tab in the Layout screen to create a new tab, and link via an icon to a URL. Note that this tab and option will not appear in the work item screen until after the work item is saved because the URL will be generated with the work item ID appended to it.



Example:

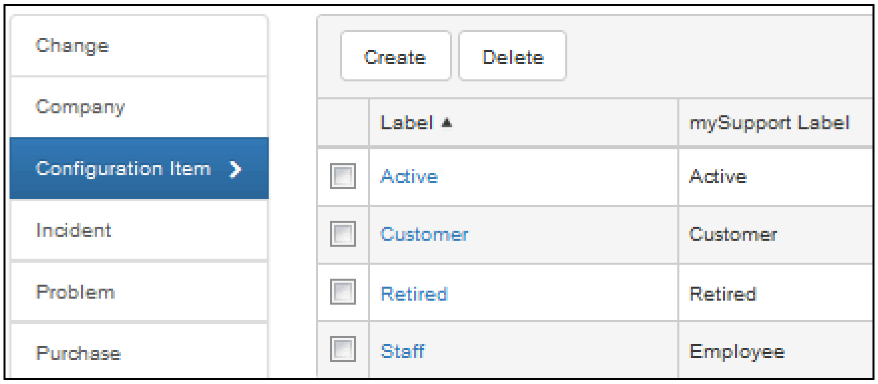


Configuring Custom Status Labels for Configuration Items

Use the CMDB Custom Status Labels screen to define labels for status levels that can be assigned to configuration items. The associated labels will appear for selection when a type is selected in the Configuration Item entry screen. These status labels are different from other status labels in iSupport in that there are no fixed status levels; you can modify or delete any of the status labels included by default as well as enter new ones. Note you must have at least one custom status label.

In addition to status labels such as Active and Retired, you can create status labels to designate stages in the life cycle of a configuration item; for example, Designed, Ordered, Under Development, In Test, Implemented, In Production, and Under Maintenance.

To define a custom status, access the Custom Status Labels screen and click the Add link.



Label - Enter the name for the status; this name will appear for selection and in views on the Desktop.

Alternate Label on mySupport - Enter the status label to appear on the mySupport. Enable the status label via the CMDB Display tab in the mySupport | Portals | Options configuration screen.

Not Assigned/Assigned to These Types - Use these fields to assign the status to one or more CMDB types. The Not Assigned field includes predefined CMDB types; select the right arrow to assign a type to the status. To unassign a type, select the type under Assigned to These Types and select the left arrow.

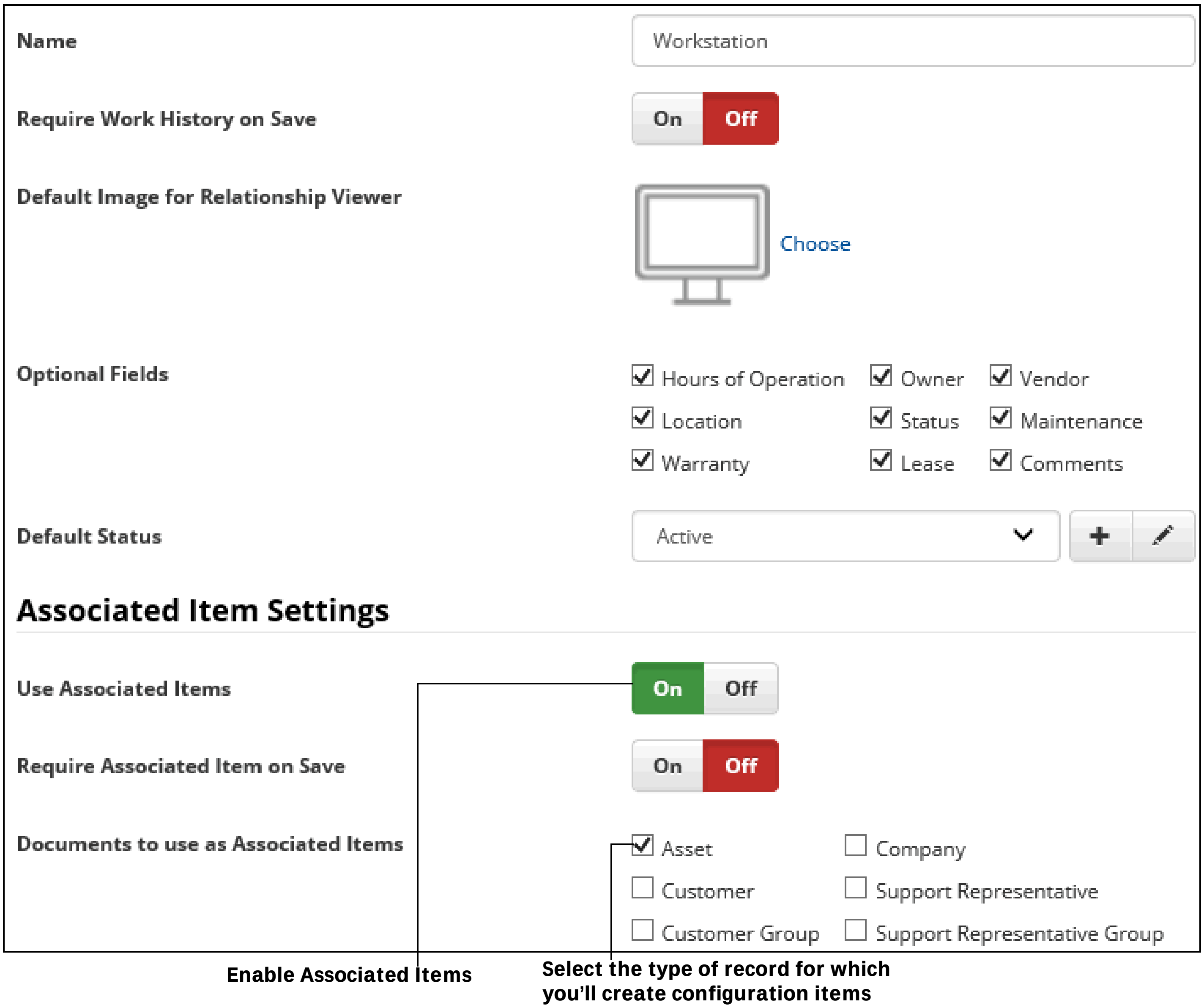
Creating Configuration Items Automatically

You can use the Configuration Item Auto Create Agent in the Agents screen to create a CI for **each** asset, customer, company, support representative profile, and/or member of customer or support representative group that is not already associated with a configuration item. This requires you to select a configuration item to use as a template for populating fields in the newly-created configuration items.

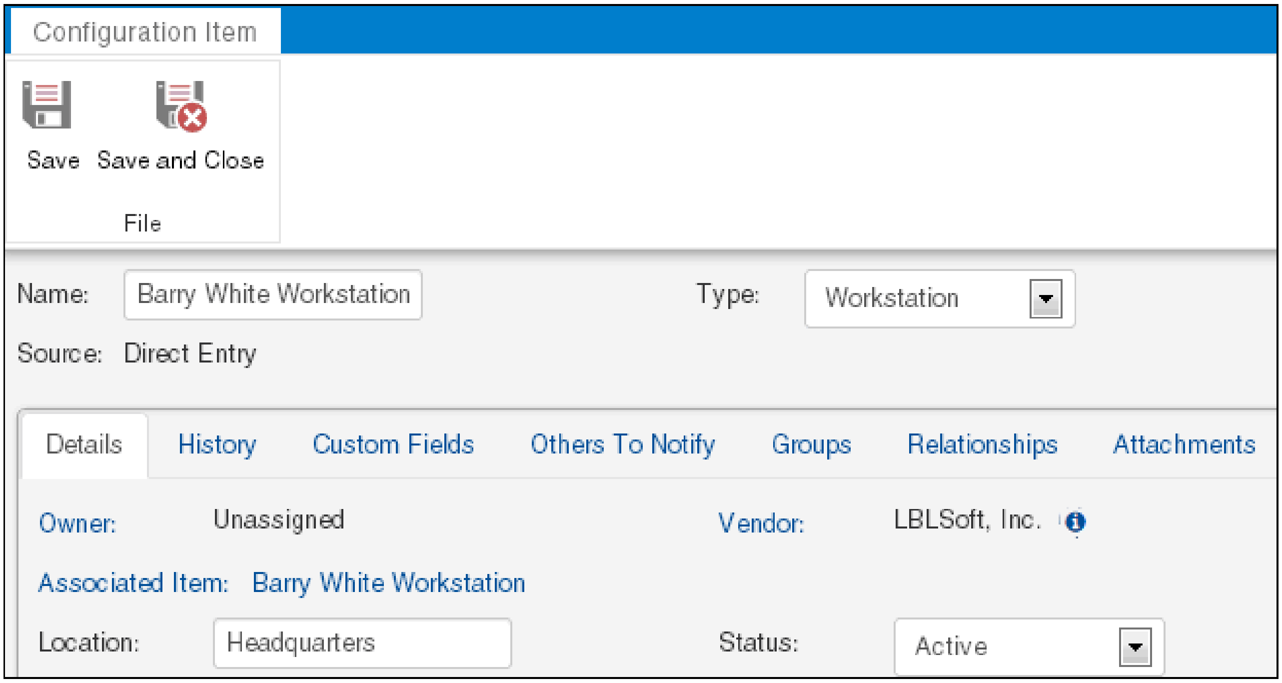
Creating Configuration Items for Assets

Follow these steps to automatically create a CI for each asset that is not already associated with a CI.

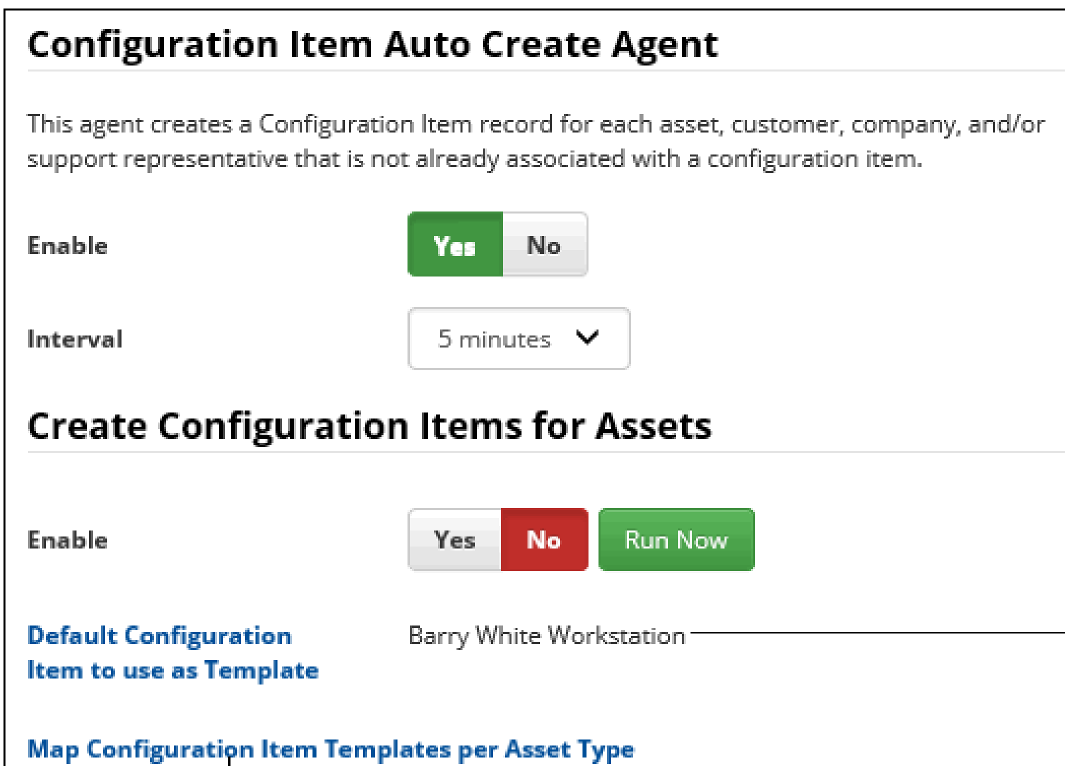
1 This process requires you to select a CI to use as a template for populating fields in the newly-created CIs. Open the CMDB type associated with that CI and select Yes in the Use Associated Items field. Then Asset in the Documents to Use as Associated Items field.



2 On the CI you'll use as a template, make entries that you wish to be included on the newly-created CIs. **Note that only the names of the newly-created CIs will be taken from the associated Asset records; any entries in custom fields and common fields such as Owner, Location, Maintenance, Warranty, Comments, and Groups will be taken from the CI used as a template.**



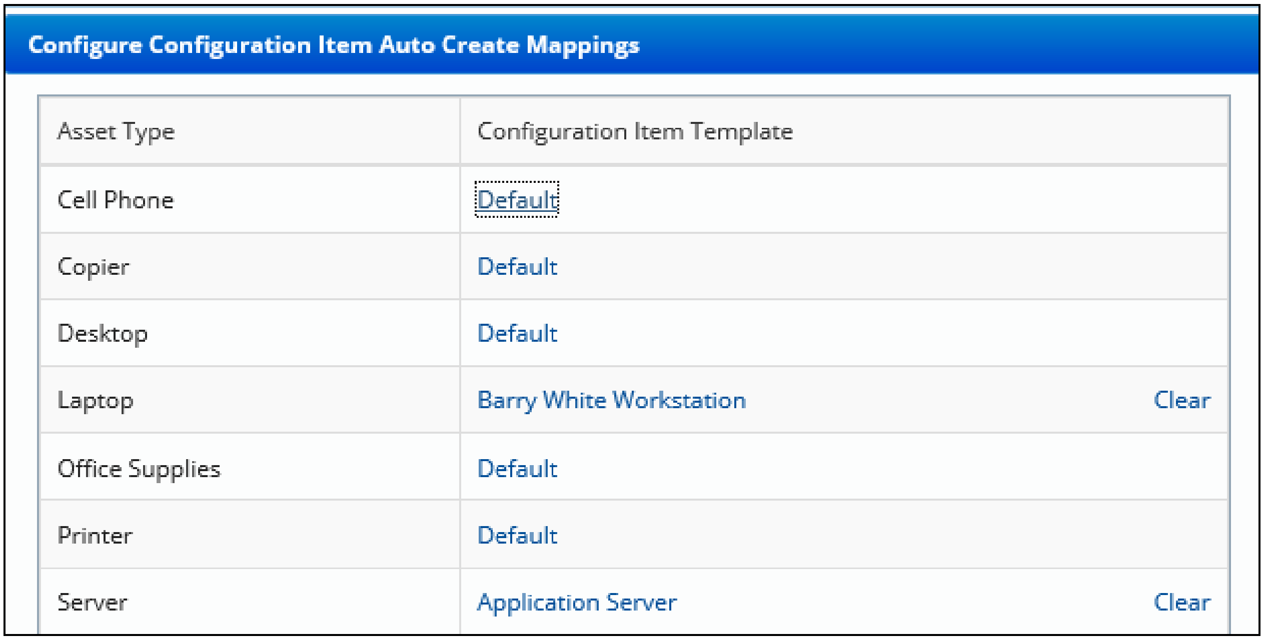
3 In the Agents screen, click on the Configuration Item to Use as a Template link and select the CI to use as a template.



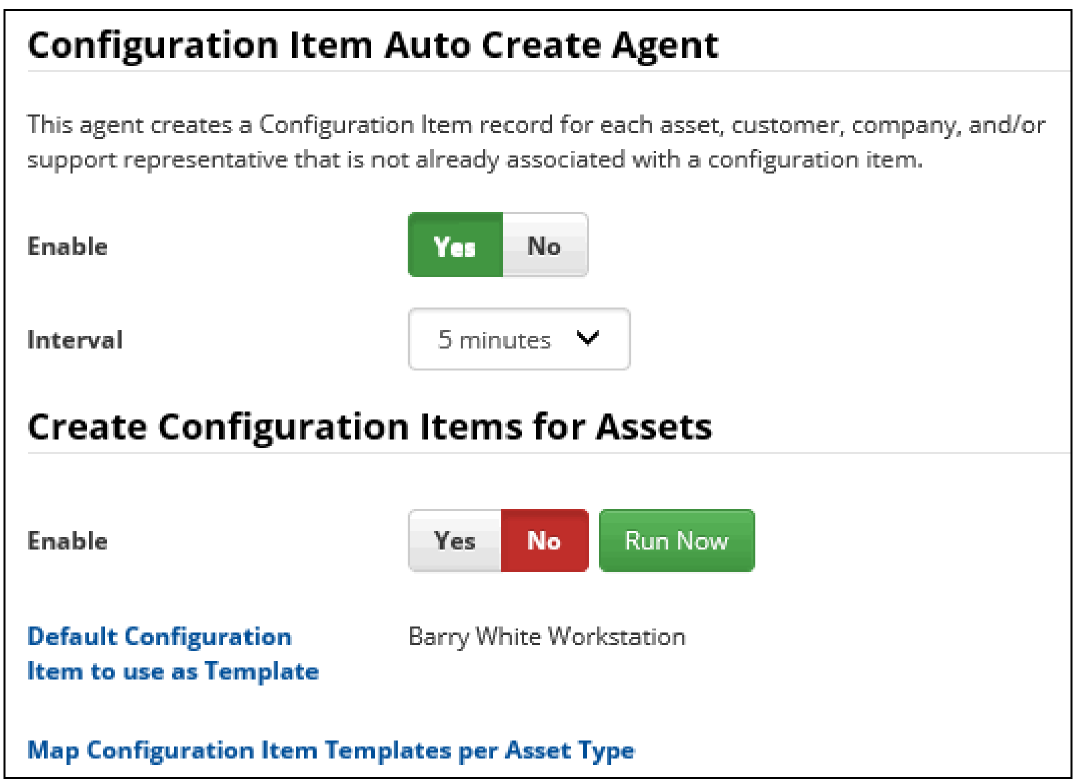
Select the configuration item to use as a template

Use this link if creating configuration items for multiple asset types

4 **If creating CIs for multiple asset types,** click the Map Configuration Item Templates per Asset Type link to select a CI for each applicable asset type. In the following example, CIs will be created for all asset records with the type of Laptop, and the Barry White Workstation CI will be used as a template. CIs will be created for all asset records with a type of Server, and the Application Server CI will be used as a template.



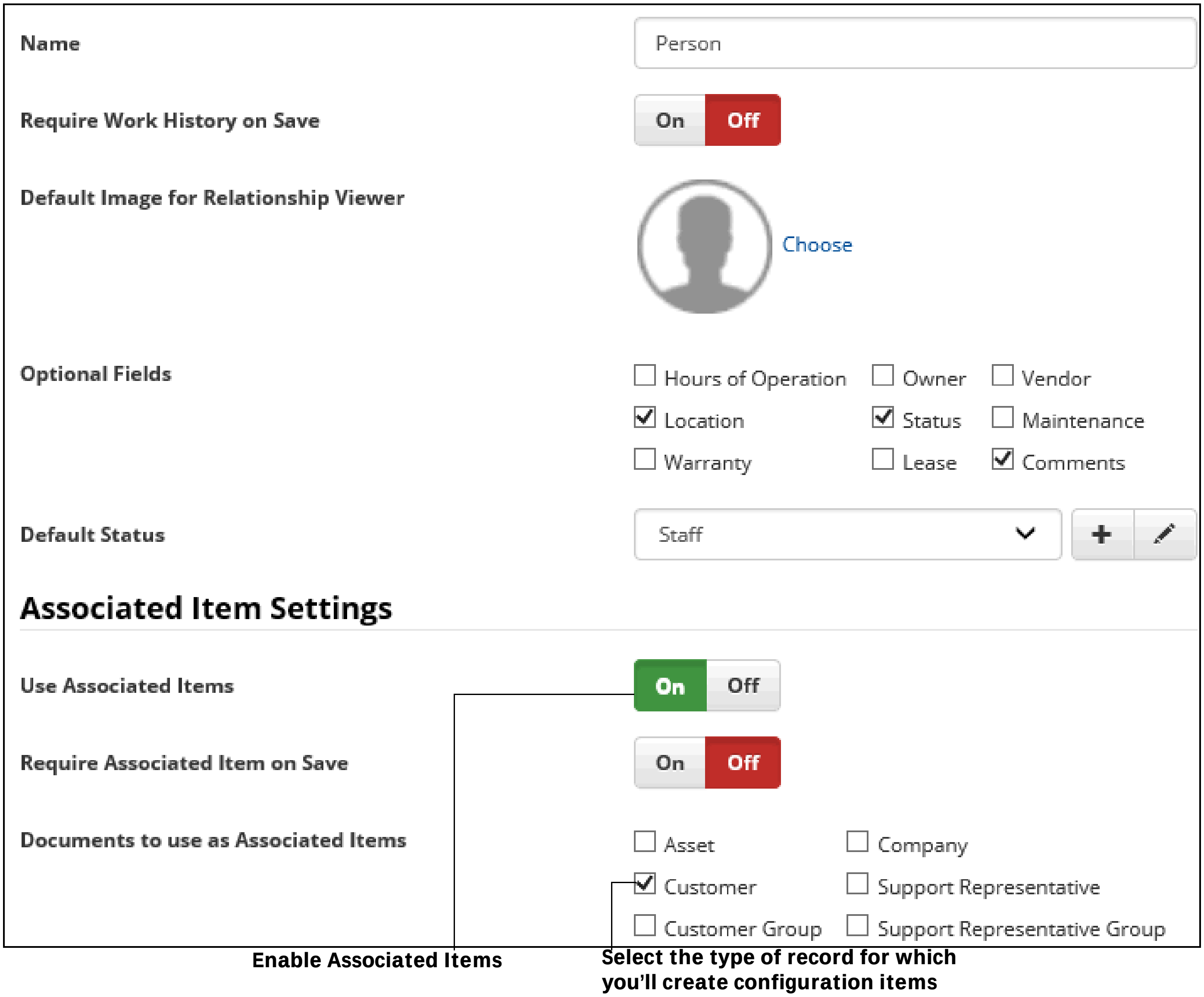
5 To run the agent immediately and create the CIs on a one-time basis, click the Run Now button. To run the agent on an interval basis, select Yes in the Enable field in the Create Configuration Items for Assets section **and** at the top of the Configuration Item Auto Create Agent section. Then set the agent interval and save.



Creating Configuration Items for Customers

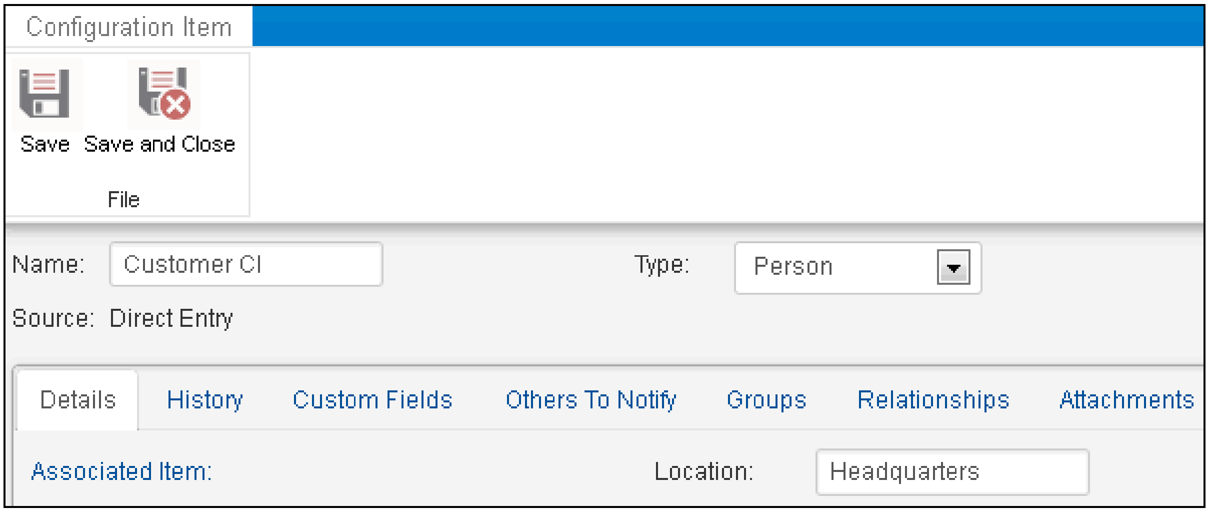
Follow these steps to automatically create a CI for each Customer Profile record that is not already associated with a CI.

1 This process requires you to select a CI to use as a template for populating fields in the newly-created CIs. Open the CMDB type associated with that CI and select Yes in the Use Associated Items field. Then select Customer in the Documents to Use as Associated Items field.

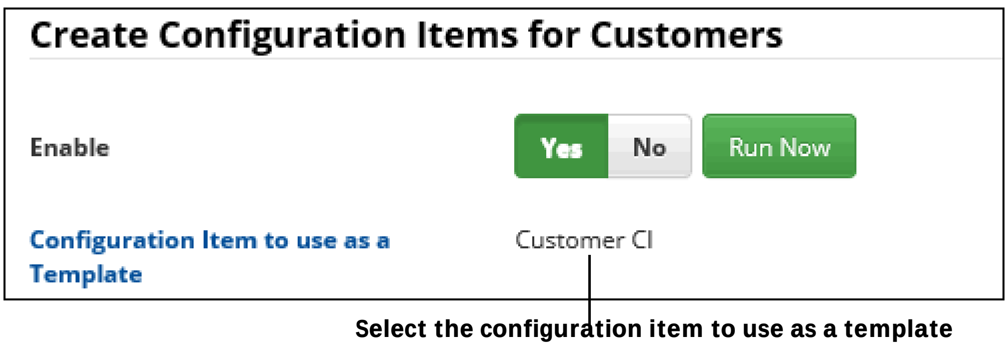


2 On the CI you'll use as a template, make entries that you wish to be included on the newly-created CIs. **Note that only the names of the newly-created** CIs **will be taken from the associated Customer Profile records; any**

entries in custom fields and common fields such as Owner, Location, Maintenance, Warranty, Comments, and Groups will be taken from the CI used as a template.



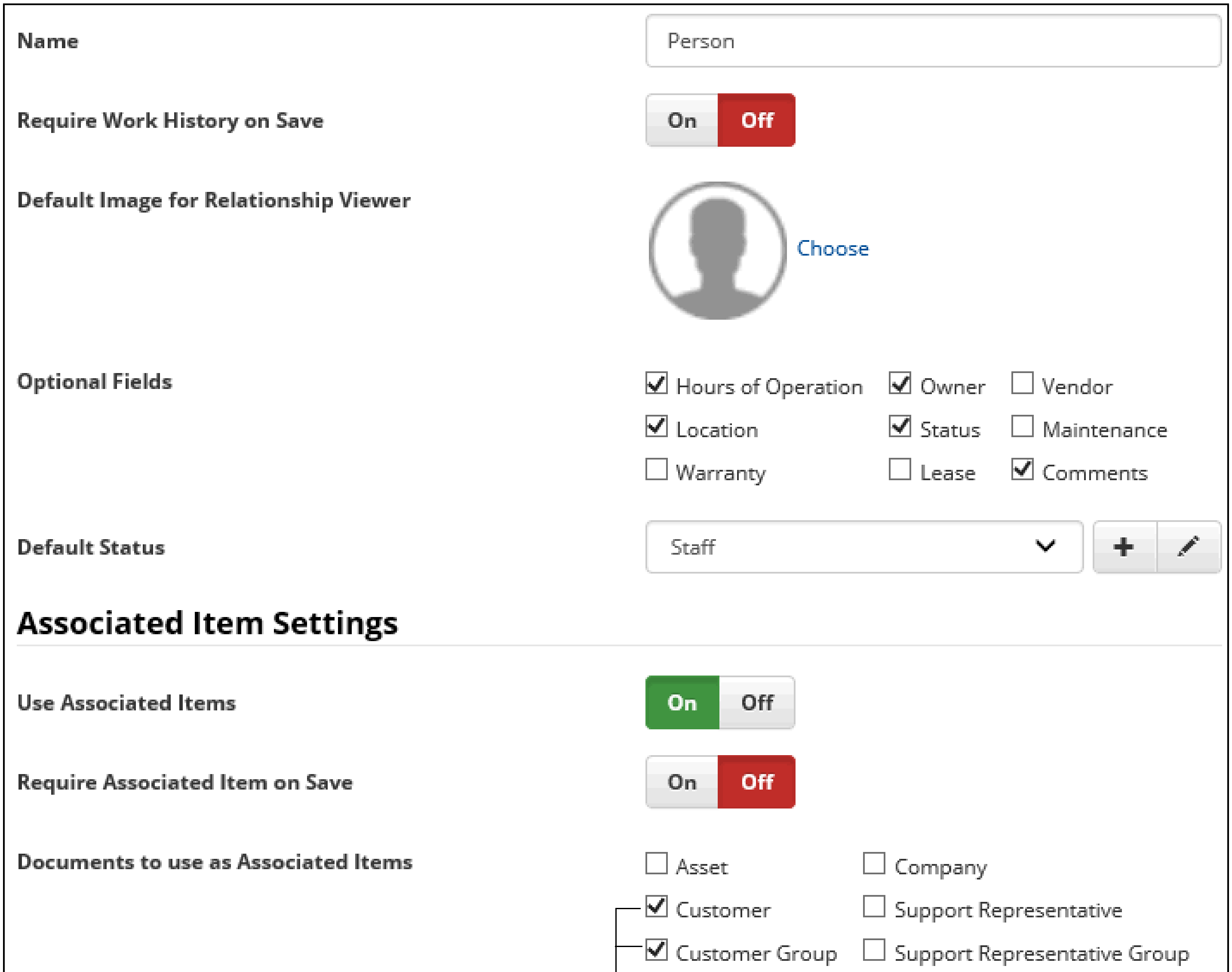
3 In the Agents screen, click on the Configuration Item Template link and select the CI to use as a template. To run the agent immediately and create the CIs on a one-time basis, click the Run Now button next to the Configuration Item to Use as a Template link. To run the agent on an interval basis, select Yes in the Enable field in the Create Configuration Items for Customers section **and** at the top of the Configuration Item Auto Create Agent section. Then set the agent interval and save.



Creating Configuration Items for Customer Groups and Group Members

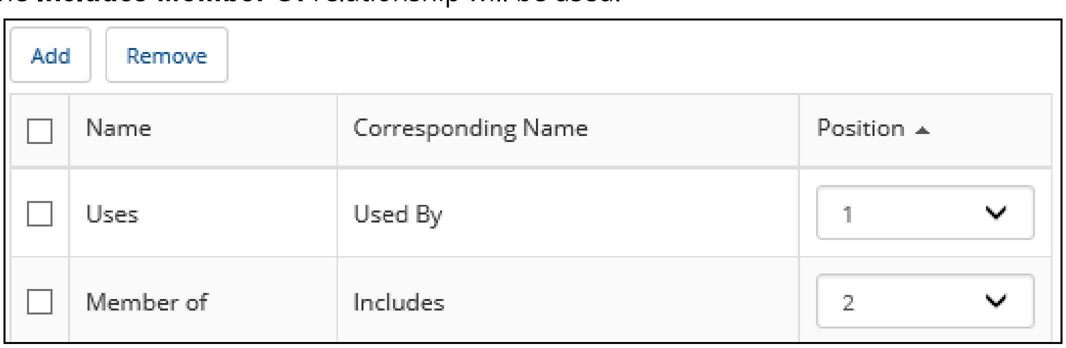
Follow these steps to create CIs automatically for both customer groups and the customers in those groups:

1 Open the CMDB type associated with CIs you'll designate as a templates (one for customers and one for customer groups) and select Yes in the Use Associated Items field. Then select Customer and Customer Group in the Documents to Use as Associated Items field.



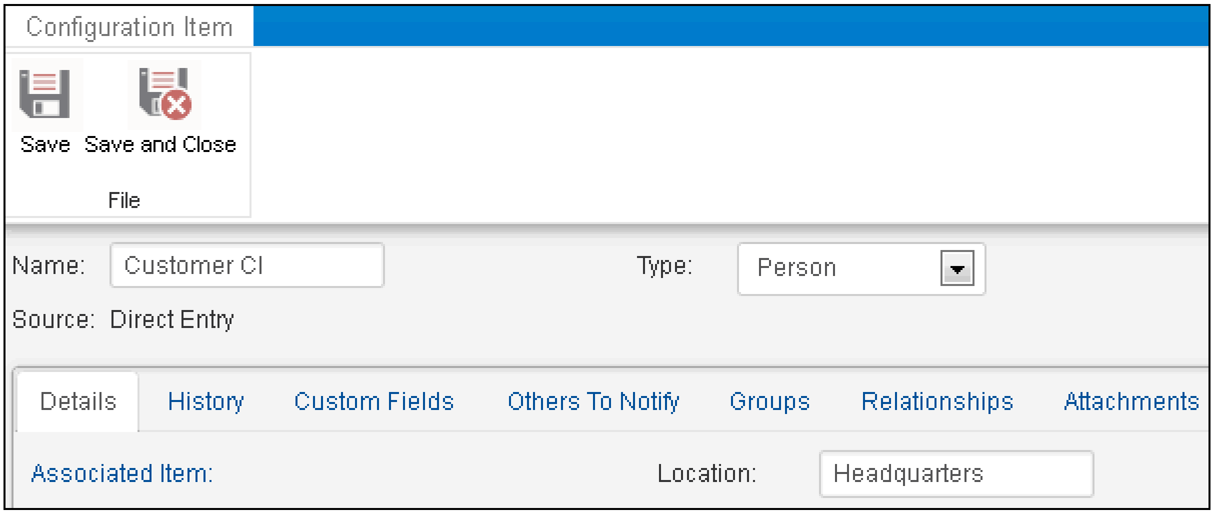
Select if creating configuration items for customer groups and group members

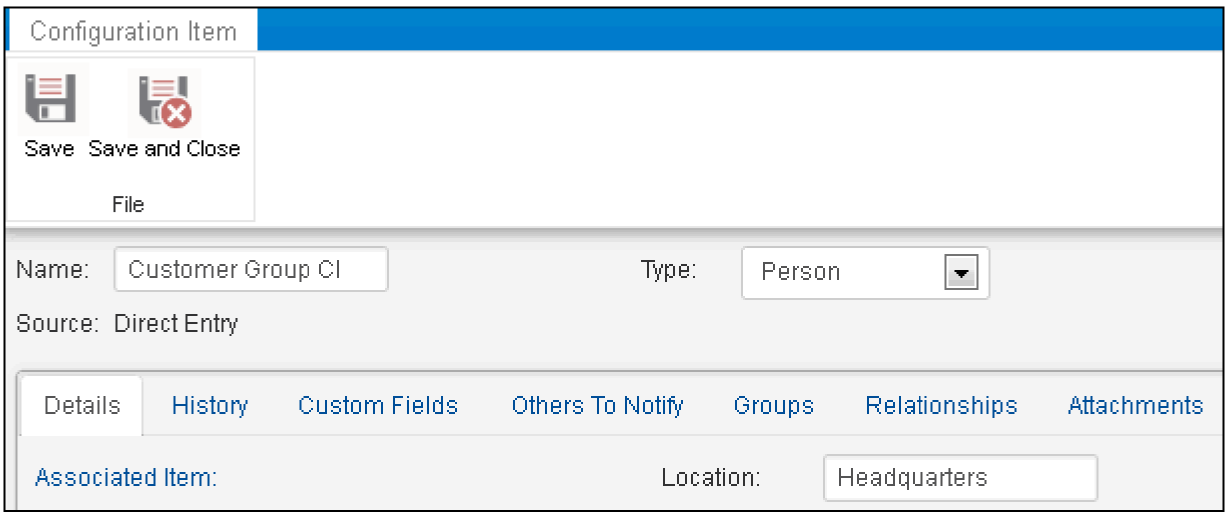
2 On the Relationships tab in the CMDB Type screen, ensure that the relationship to assign to the CIs to be created is included. You'll be selecting the relationship of the group to the members, and you'll be able to use the relationships in both the Name and Corresponding Name columns. (In the example below, you'll be able to select from the Uses-Used By, Used By-Uses, Member Of-Includes, and Includes-Member Of relationships.) In this example, the **Includes-Member Of** relationship will be used.



3 On the CIs you'll use as templates, make entries that you wish to be included on the newly-created CIs. **Note that only the names of the newly-created CIs will be taken from the associated customer and customer**

groups; any entries in custom fields and common fields such as Owner, Location, Maintenance, Warranty, Comments, and Groups will be taken from the CI used as a template.



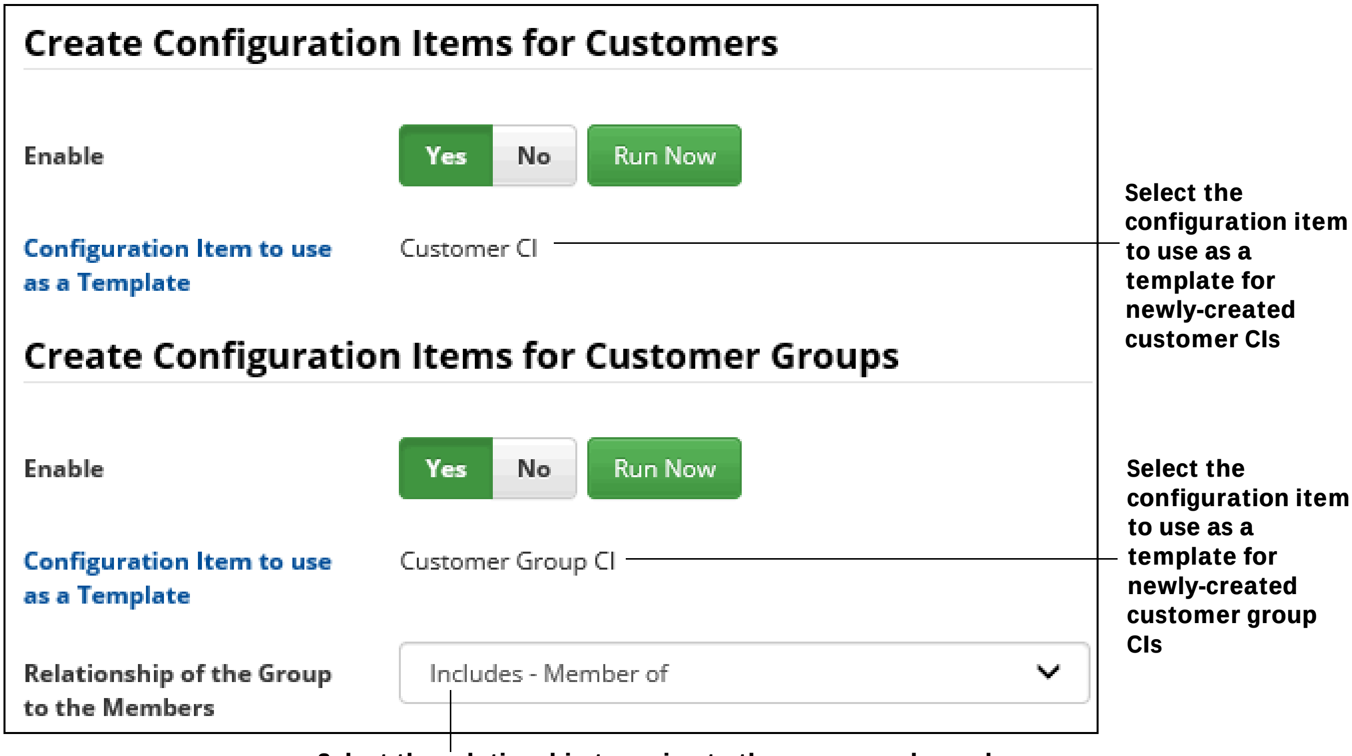


4 In the Agents screen:

a Click the Configuration Item to Use as a Template link in the Create Configuration Items for Customers section and select the CI you are using as a template for populating fields in newly-created customer CIs.

b Click the Configuration Item to Use as a Template link in the Create Configuration Items for Customer Groups section and select the CI you are using as a template for populating fields in newly-created customer group CIs.

c Select the relationship of the group to the members.

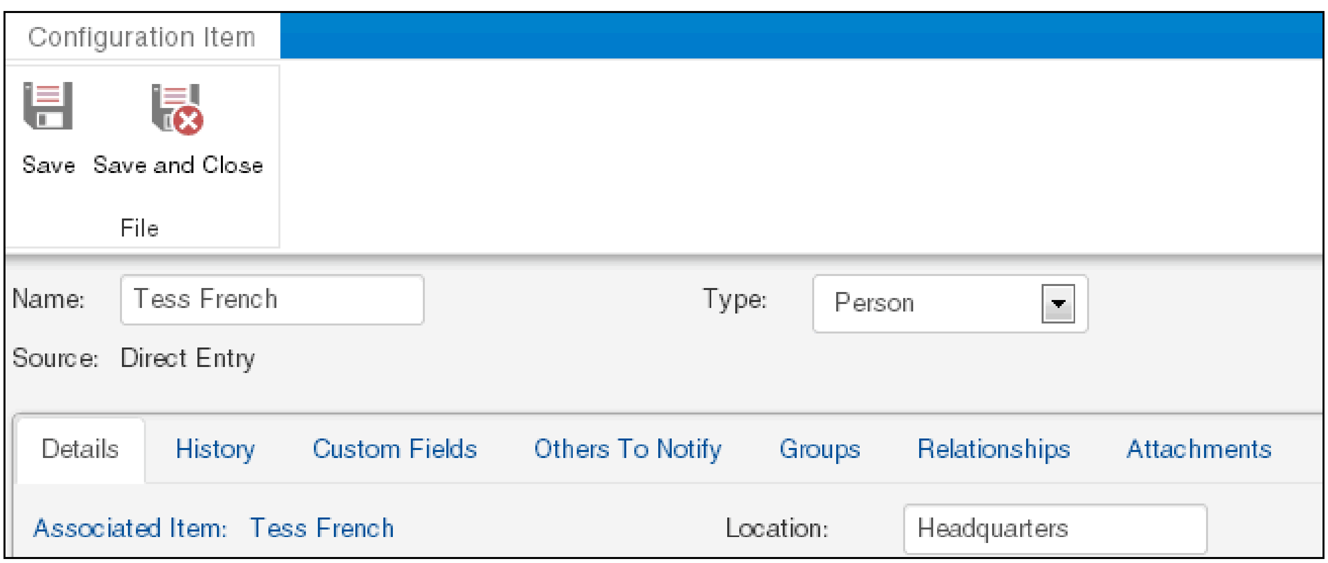


Select the relationship to assign to the groups and members

5 To run the agent immediately on a one-time basis, click the Run Now button next to the Configuration Item to Use as a Template link.

6 Review the newly-created CIs on the Desktop. In newly-created customer group CIs, the source will be **Auto Create** and the Relationships tab will display the assigned relationships of the group to the group members.

In newly-created customer CIs, the Associated Item field will contain a link to the existing Customer Profile record from which the CI was created.



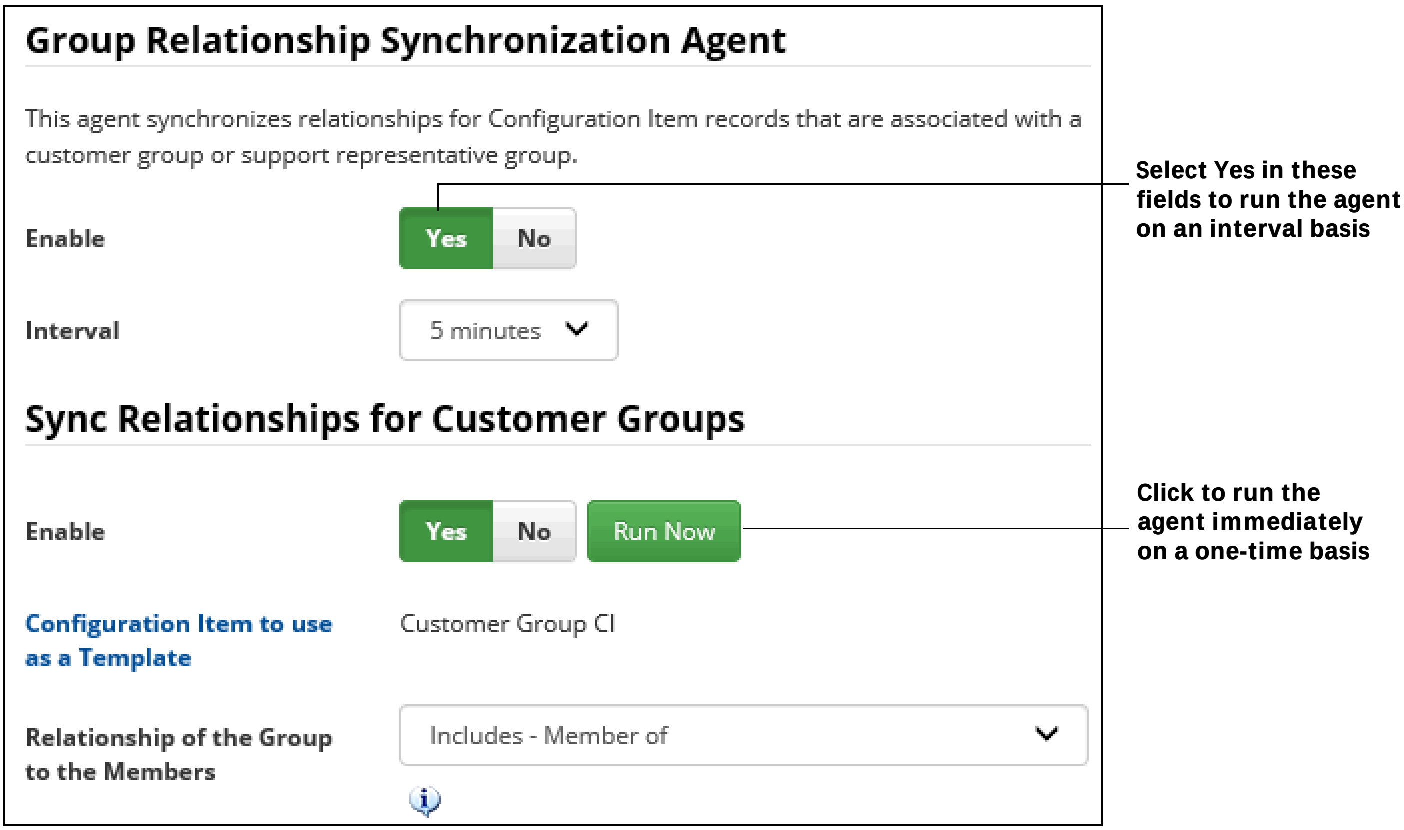
The Relationships tab on the newly-created customer CI will display the relationship of the member to the group.

7 To run the agent on an interval basis, select Yes in the Enable field in the Create Items for Customer Groups section, Create Configuration Items for Customers, **and** at the top of the Configuration Item Auto Create Agent section. Then set the agent interval and save.

Synchronizing Customer Group Relationships

If applicable, you can use the Group Relationship Synchronization agent to monitor existing customer group CIs and update any changes in the associated customer groups. For example, if a customer is added to a customer group, it creates a CI record for that customer and adds a relationship to the customer group CI. You'll need to specify a CI to use as a template and a relationship for the newly-created customer CIs; however, note that **the relationship selected for synchronization will not be available for assignment to any other CI or group**. You may wish to add a relationship to the type of the CI used as a template for this purpose.

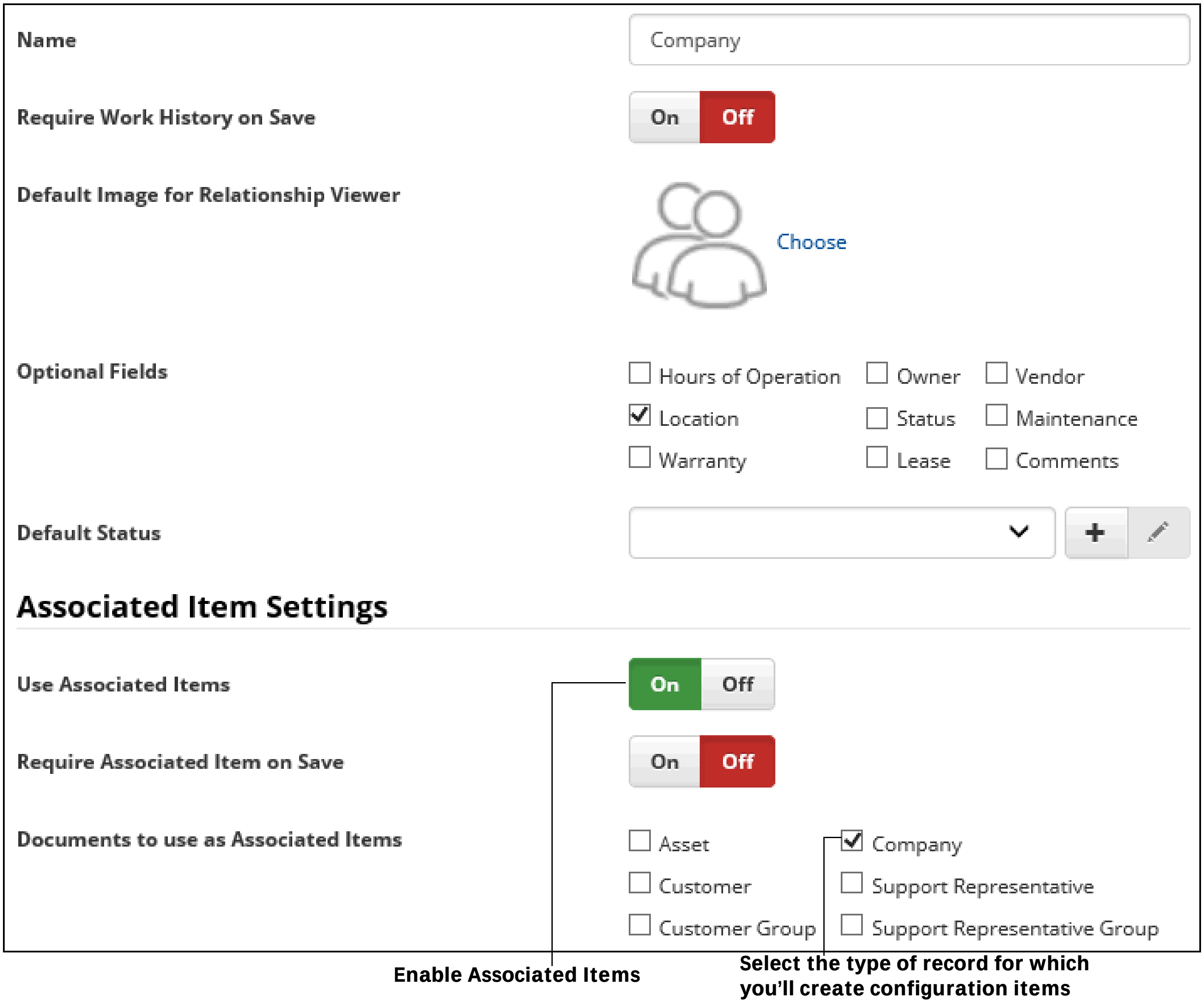
To run the agent immediately on a one-time basis, click the Run Now button in the Create Configuration Items for Customer Groups section. To run the agent on an interval basis, select Yes in the Enable field in the Sync Relationships for Customer Groups section **and** at the top of the Group Relationship Synchronization Agent section. Then set the agent interval and save.



Creating Configuration Items for Companies

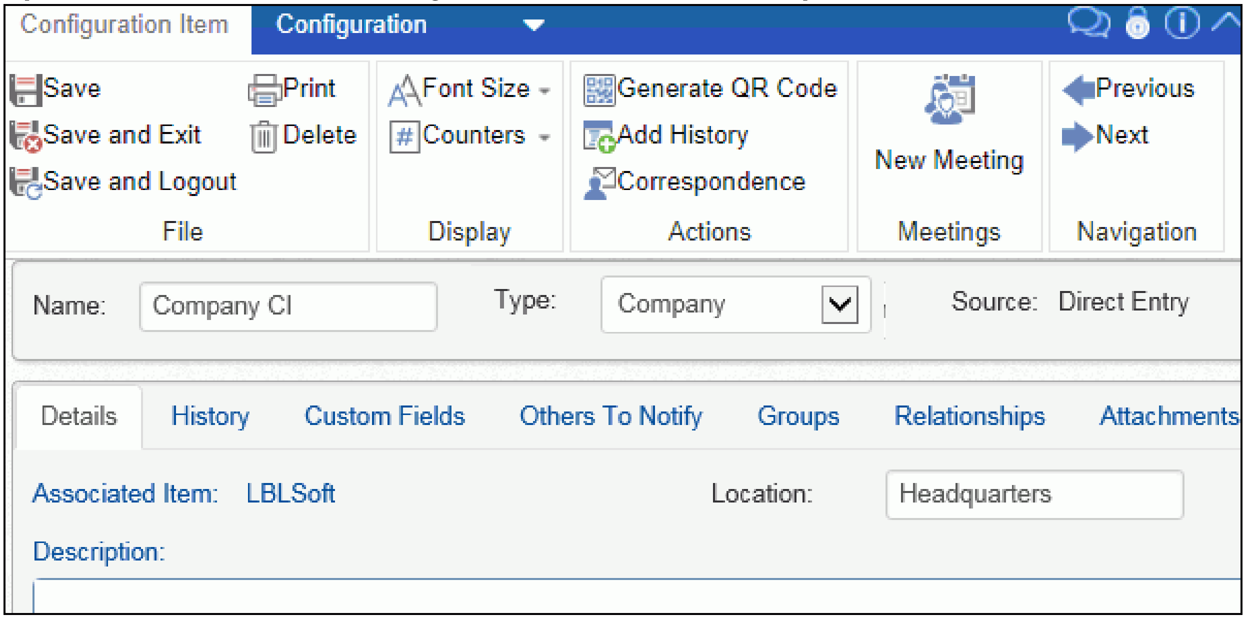
You can use the Configuration Item Auto Create Agent in the Agents screen to create a CI for each company that is not already associated with a configuration item. This requires you to select a CI to use as a template for populating fields in the newly-created CIs.

1 Open the CMDB type associated with CI you'll designate as a template and select Yes in the Use Associated Items field. Then select Company in the Documents to use as Associated Items field.



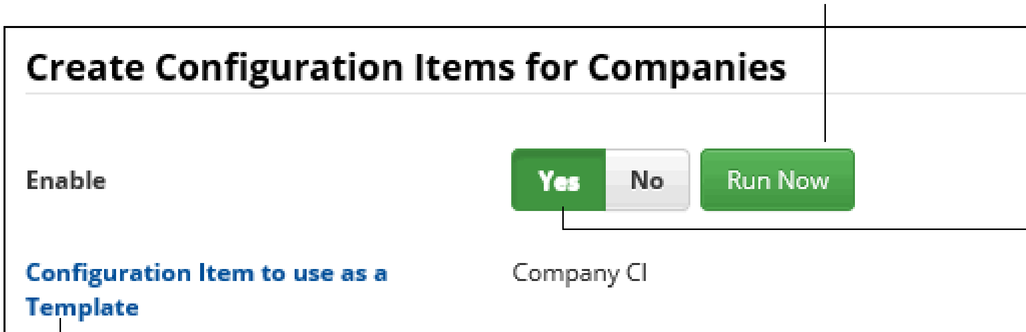
2 On the CI you'll use as a template, make entries that you wish to be included on the newly-created CIs. **Note that only the names of the newly-created CIs will be taken from the associated Company records; any entries**

in custom fields and common fields such as Owner, Location, Maintenance, Warranty, Comments, and Groups will be taken from the configuration item used as a template.



3 On the Configuration Management | Agents tab, click on the Configuration Item Template link and select the CI to use as a template.

Click to run the agent immediately on a one-time basis



Select Yes in these fields to run the agent on an interval basis

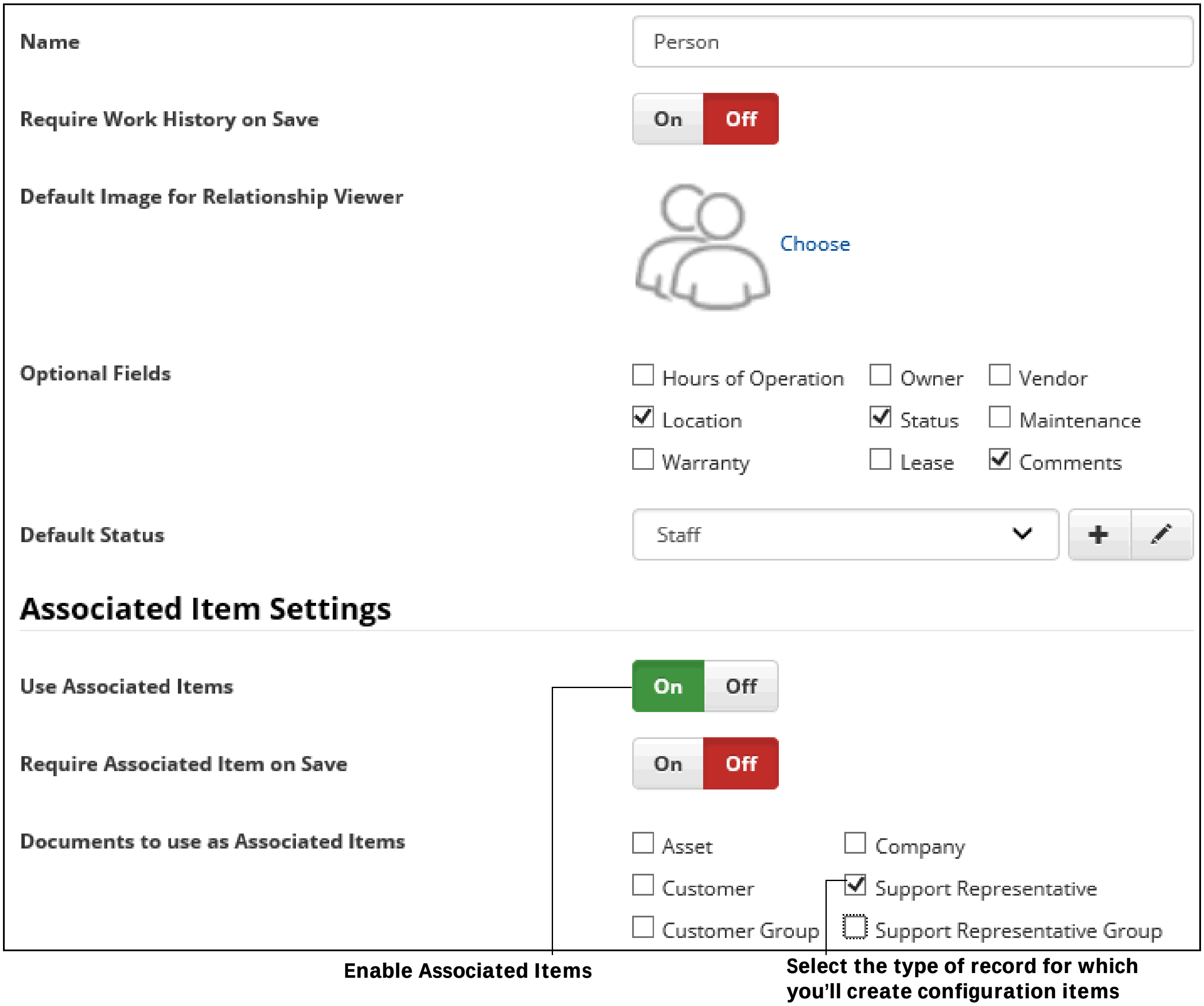
Select the configuration item to use as a template for newly-created company CIs

4 To run the agent immediately and create the CIs on a one-time basis, click the Run Now button. To run the agent on an interval basis, select Yes in the Enable field in the Create Configuration Items for Companies section **and** at the top of the Configuration Item Auto Create Agent section. Then set the agent interval and save.

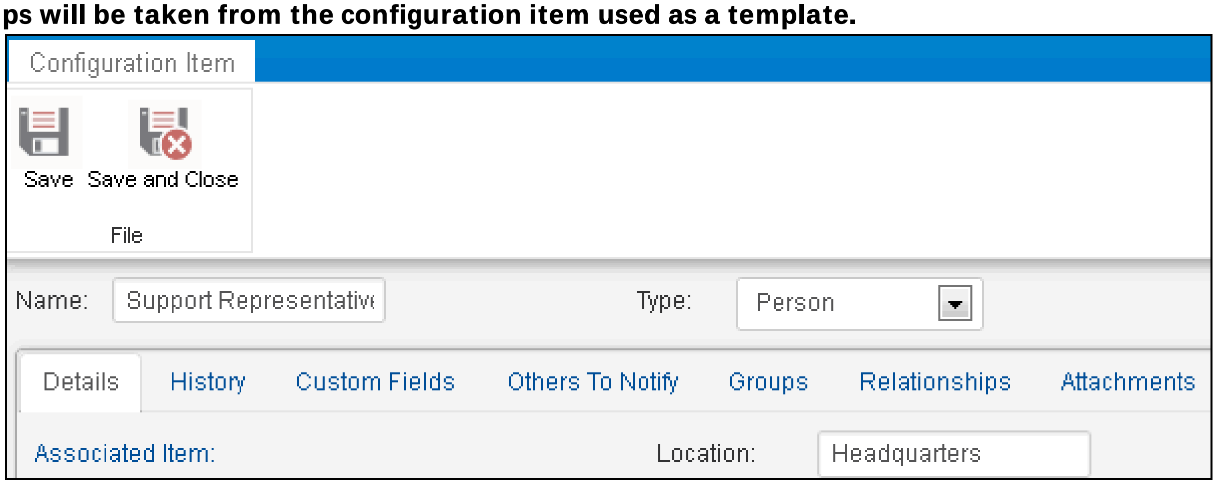
Creating Configuration Items for Support Representatives

You can use the Configuration Item Auto Create Agent in the Agents screen to create a CI for each support representative that is not already associated with a configuration item. This requires you to select a CI to use as a template for populating fields in the newly-created CIs.

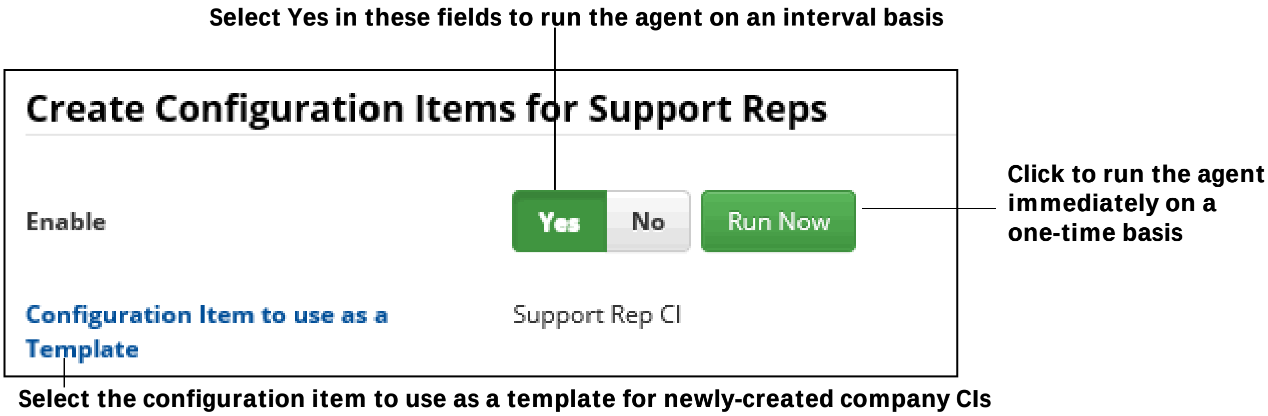
1 Open the CMDB type associated with CI you'll designate as a template and select Yes in the Use Associated Items field. Then select Support Representative in the Documents to use as Associated Items field.



2 On the CI you'll use as a template, make entries that you wish to be included on the newly-created CIs. **Note that only the names of the newly-created CIs will be taken from the associated Company records; any entries in custom fields and common fields such as Owner, Location, Maintenance, Warranty, Comments, and Groups will be taken from the configuration item used as a template.**



3 On the Configuration Management | Agents tab, click on the Configuration Item to use as a Template link and select the CI to use as a template.



4 To run the agent immediately and create the CIs on a one-time basis, click the Run Now button next to the Configuration Item to Use as a Template link. To run the agent on an interval basis, select Yes in the Enable field in the Create Configuration Items for Support Reps section **and** at the top of the Configuration Item Auto Create Agent section. Then set the agent interval and save.

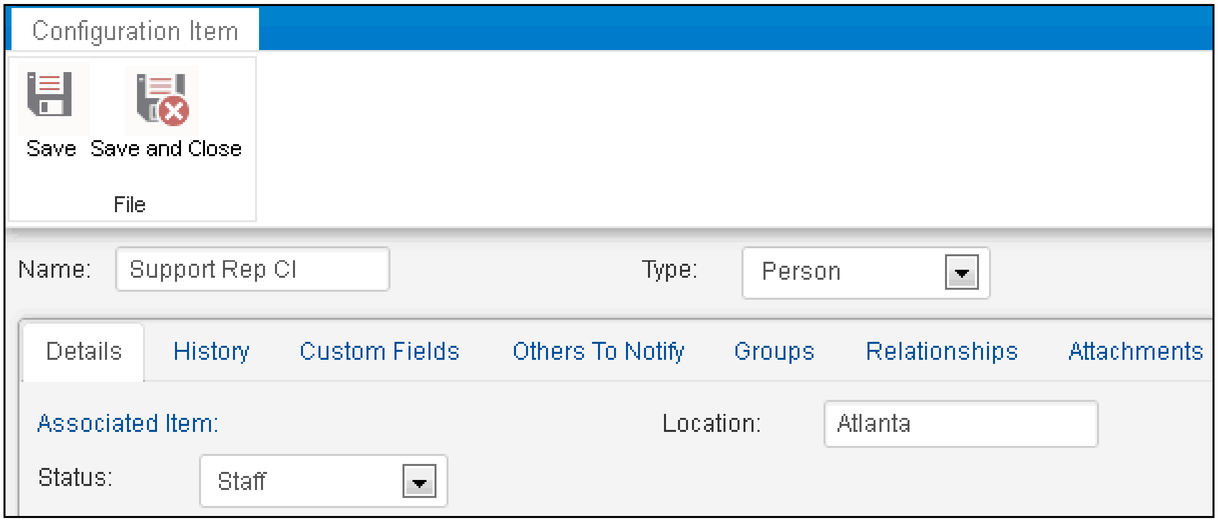
Creating Configuration Items for Support Representative Groups and Group Members

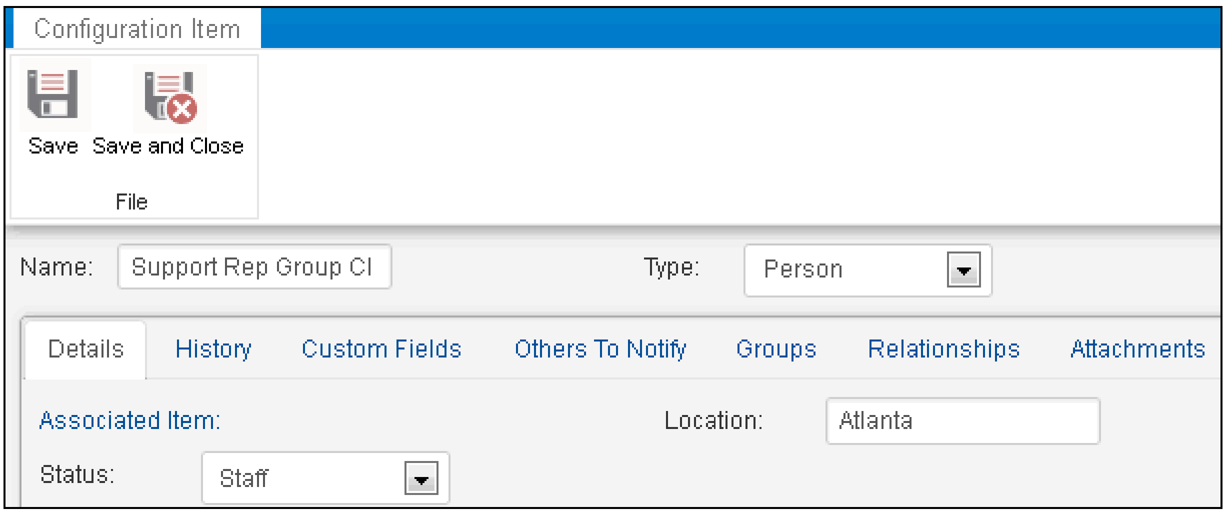
You can use an agent to create CIs automatically for both support representative groups and the support representatives in those groups. Follow these steps:

1 You'll first need to designate a CI to use as a template for the newly-created support representative group CIs as well as a CI to use as a template for the newly-created support representative CIs. You may wish to create CIs specifically for this purpose. On these items, make entries that you wish to be included on the newly-created CIs.

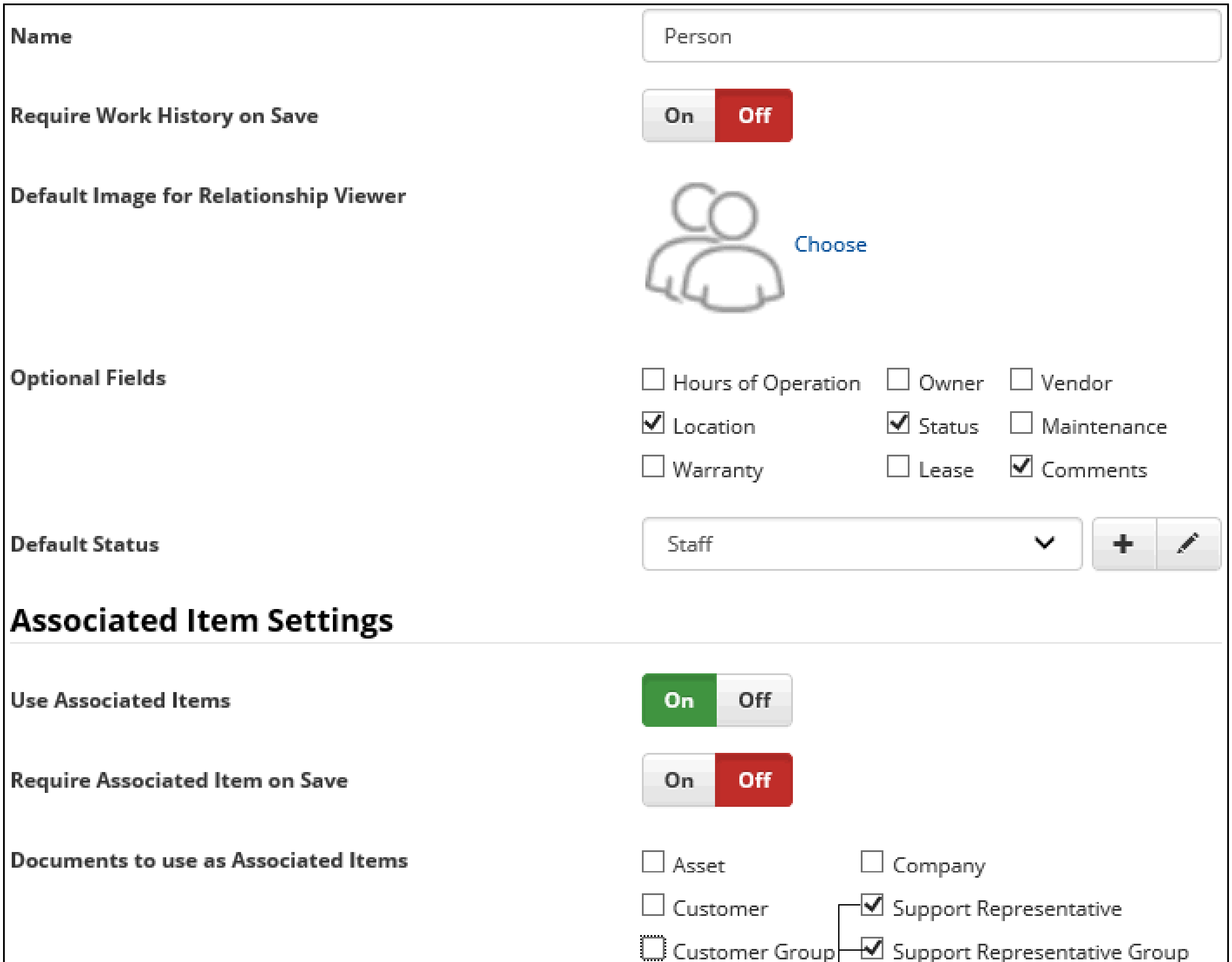
Note that only the names of the newly-created CIs will be taken from the associated support representative and support representative group records; any entries in custom fields and common fields

such as Owner, Location, Maintenance, Warranty, Comments, and Groups will be taken from the CI used as a template.





2 Ensure that the CMDB type of both of the configuration items you are using as templates has the Support Representative and Support Representative Group options selected in the Documents to Use as Associated Items section.



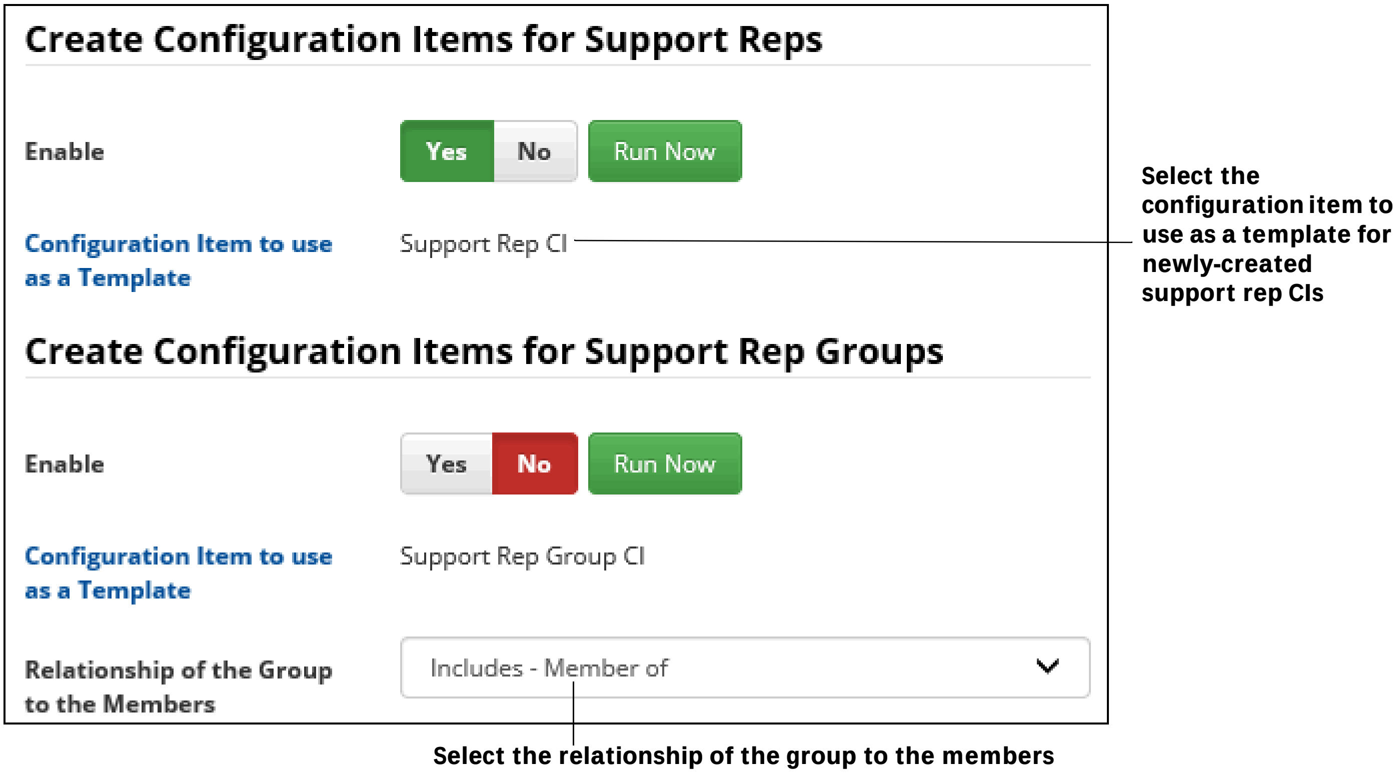
Select if creating configuration items for support representative groups and group members

3 On the Relationships tab in the CMDB Type screen, ensure that the relationship to assign to the CIs to be created is included. You'll be selecting the relationship of the group to the members in the Agent screen, and you'll be able to use the relationships in both the Name and Corresponding Name columns. (In the example below, you'll be able to select from the Uses-Used By, Used By-Uses, Member Of-Includes, and Includes-Member Of relationships.)

4 In the Agents screen:

- **a** Click the Configuration Item to Use as a Template link in the Create Configuration Items for Support Representatives section and select the CI you are using as a template for populating fields in newly-created support representative CIs.
- **b** Click the Configuration Item to Use as a Template link in the Create Configuration Items for Support Representative Groups section and select the CI you are using as a template for populating fields in newly-created support representative group CIs.

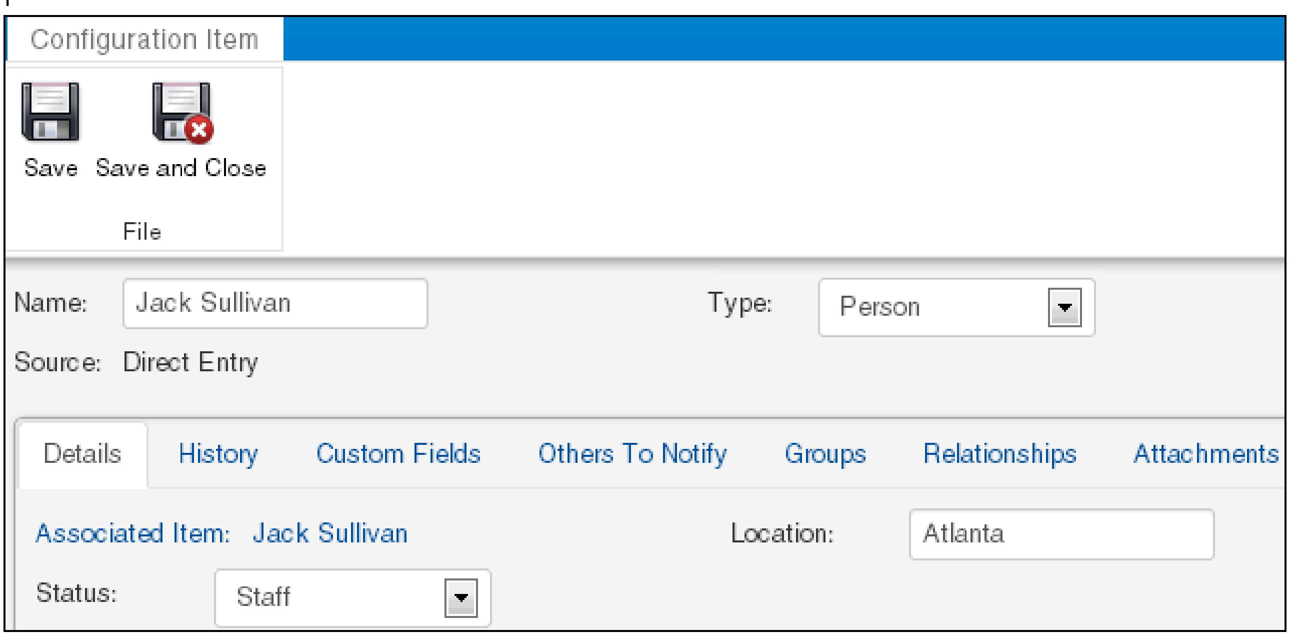
c Select the relationship of the group to the members.



d Click the Run Now button next to the Configuration Item to Use as a Template link in the Create Configuration Items for Support Rep Groups section to run the agent immediately and create the CIs on a one-time basis.

5 Review the newly-created CIs on the Desktop. In newly-created support representative group CIs, the source will be **Auto Create** and the Relationships tab will display the assigned relationships of the group to the group members.

6 In newly-created support representative CIs, the Associated Item field will contain a link to the existing Support Representative Profile record from which the CI was created.

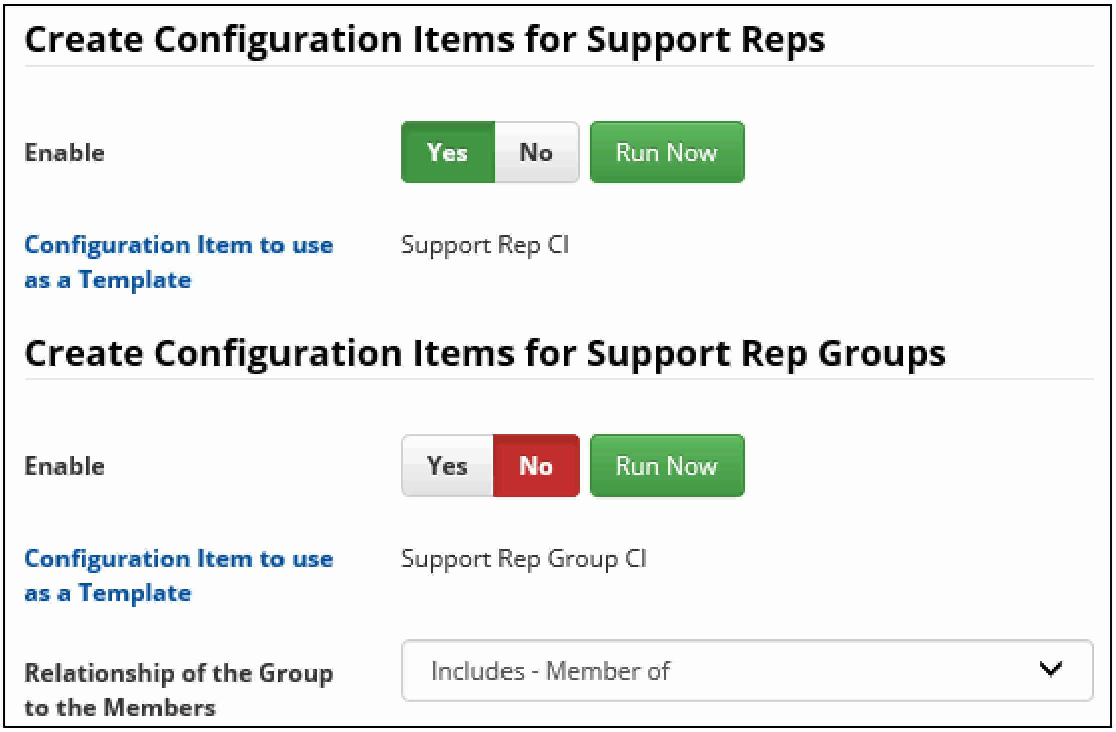


7 The Relationships tab on the newly-created support representative CI will display the relationship of the member to the group.

8 To run the agent on an interval basis, select Yes in the Enable field in the Create Items for Support Rep Groups section, Create Configuration Items for Support Reps, **and** at the top of the Configuration Item Auto Create Agent section. Then set the agent interval and save.

Synchronizing Support Representative Group Relationships

If applicable, you can use the Group Relationship Synchronization agent to monitor existing support representative group CIs and update any changes in the associated support representative groups. For example, if a customer is added to a support representative group, it creates a CI record for that support representative and adds a relationship to the support representative group CI. You'll need to specify a configuration item to use as a template and a relationship for the newly-created support representative CIs; however, note that **the relationship selected for synchronization will not be available for assignment to any other configuration item or group**. You may wish to add a relationship to the type of the CI used as a template for this purpose.



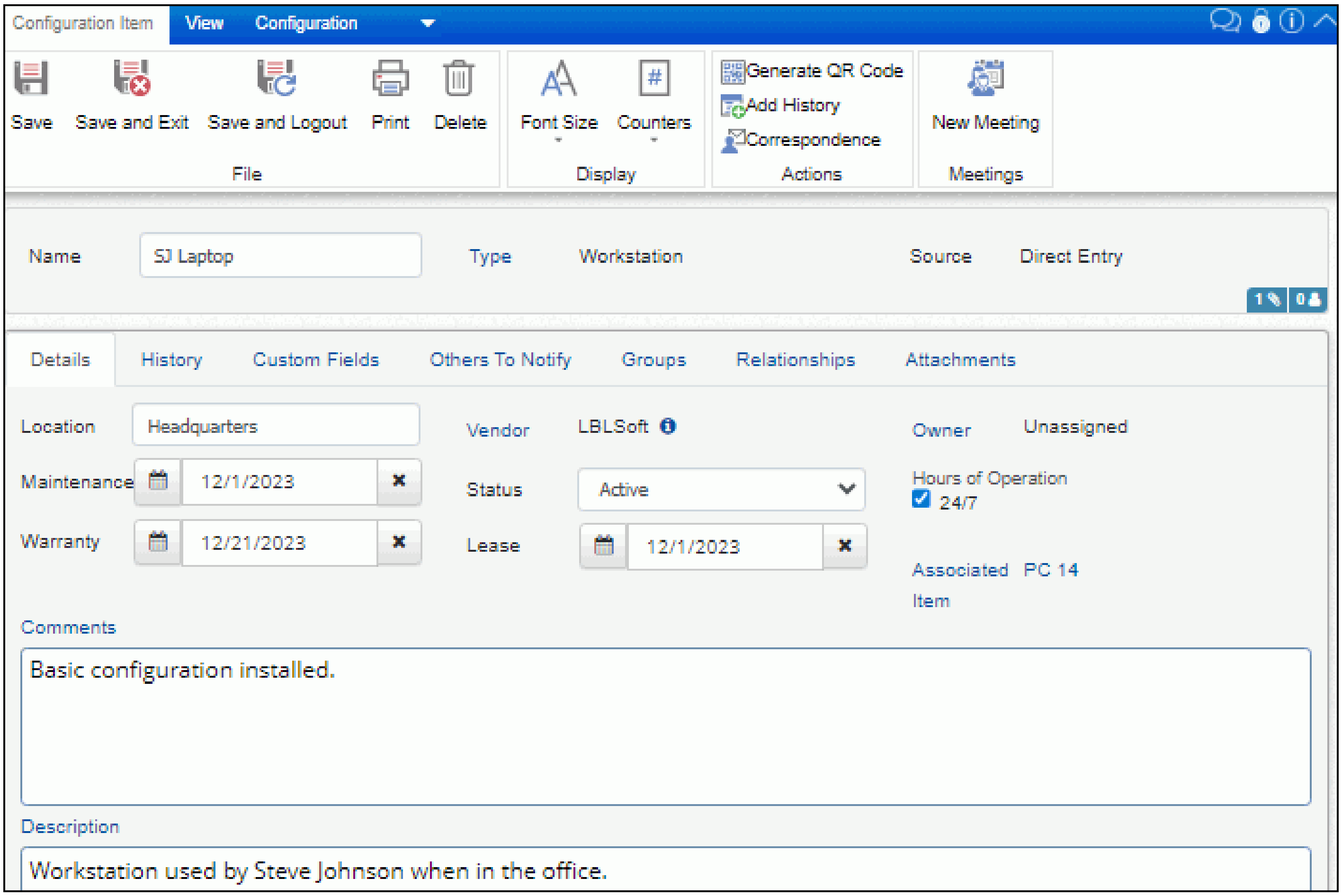
To run the agent immediately on a one-time basis, click the Run Now button in the Sync Relationships for Support Rep Groups section. To run the agent on an interval basis, select Yes in the Enable field in the Sync Relationships for Support Rep Groups section **and** at the top of the Customer Support Rep Group Relationship Synchronization Agent section. Then set the agent interval and save.

Using the iSupport® Configuration Item Screen

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 menu.

Entering Configuration Item Details

The fields that appear on the Details tab will depend on the configuration of the selected configuration type.



Name - Enter a name for the configuration item.

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 configuration.

Type - CMDB types are created in the Configuration module. The following fields can be configured to appear for each CMDB type:

> **Owner** - Select a customer or support representative to assign to the configuration item. After an entry is made you can select Information to view the person's contact information and other details.
>
> **Vendor** - Select from a list of customers, support representatives, or companies that have been designated as vendors in the applicable screen (Customer Profile, Support Representative Profile, or Company Profile).
>
> **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 Rep Profile screen.

If a configuration item was automatically created via an agent in the in configuration, an asset, company, customer, or support representative will appear in this field and "Auto Create" will appear in the Source field.

Location - 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 - Select the status to assign to the configuration item. 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 - Enter the date on which the maintenance contract ends. Expiration notifications may be configured to be sent before this date.

Warranty - Enter the date on which the warranty for the configuration item ends. Expiration notifications may be configured to be sent before this date.

Lease - Enter the date on which the lease for the configuration item ends. Expiration notifications may be configured to be sent before this date.

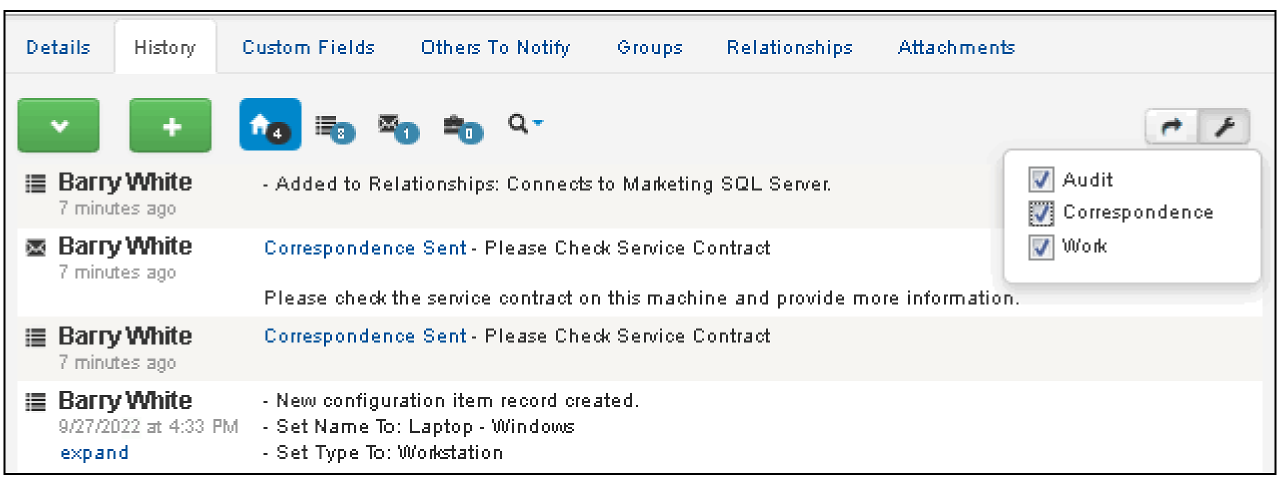
Hours of Operation - This field is used for informational viewing and reporting; it is not related to service contracts or rule group.

Comments - Enter any comments regarding the configuration item.

Description - Enter a description of the configuration item.

Adding Work History and Viewing History

Use the History tab to view notations on all configuration item actions. Select Incident | Add History or Add Work History in the History field.



- The Feed option displays a list of all actions performed on the record; you can filter the content via Settings.
- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes), as well as correspondence entries. Work history entries are not included.
- The Correspondence option 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. Note that the Ref ID that appears on expanded correspondence entries is included for reference; it is used by iSupport's email processing engine.

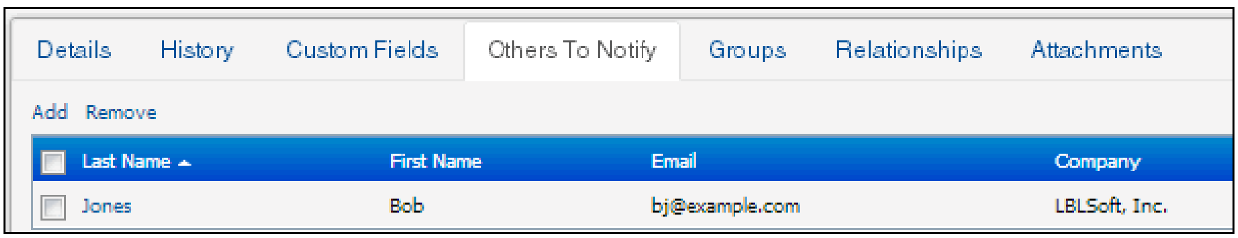
Completing Custom Fields

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 configuration, you can use the Others to Notify feature to set up a list of customers and/or 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 customer, click the Add link. Use the Remove link to delete anyone from this list.



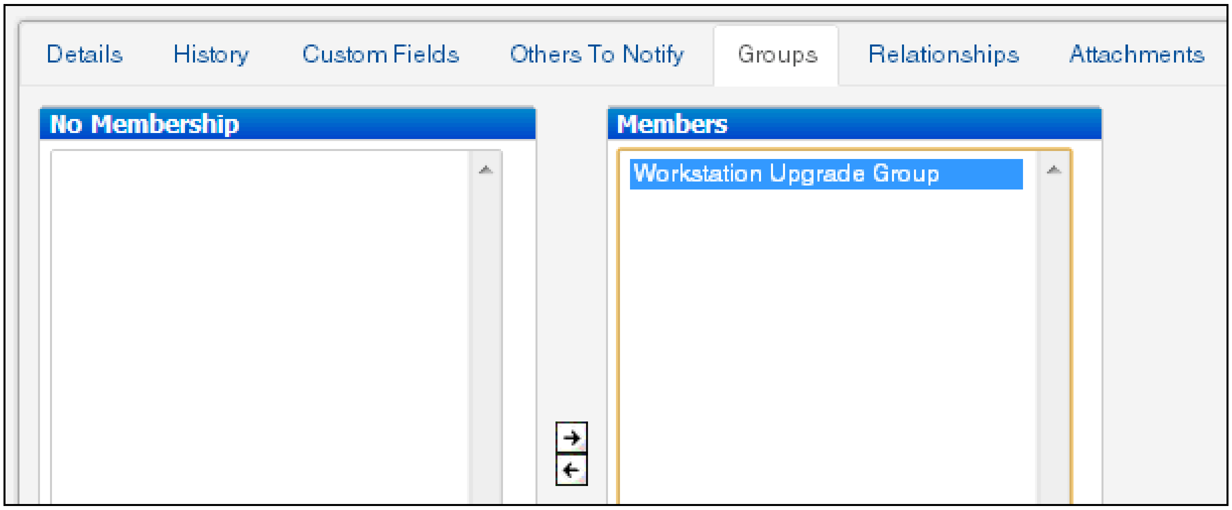
When you create a correspondence document from the CI screen or select a CI on the Desktop, you can choose to copy (CC) those in the selected Others to Notify list.

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 Others to Notify list will be used for these system-generated notifications.

Assigning to Groups

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).

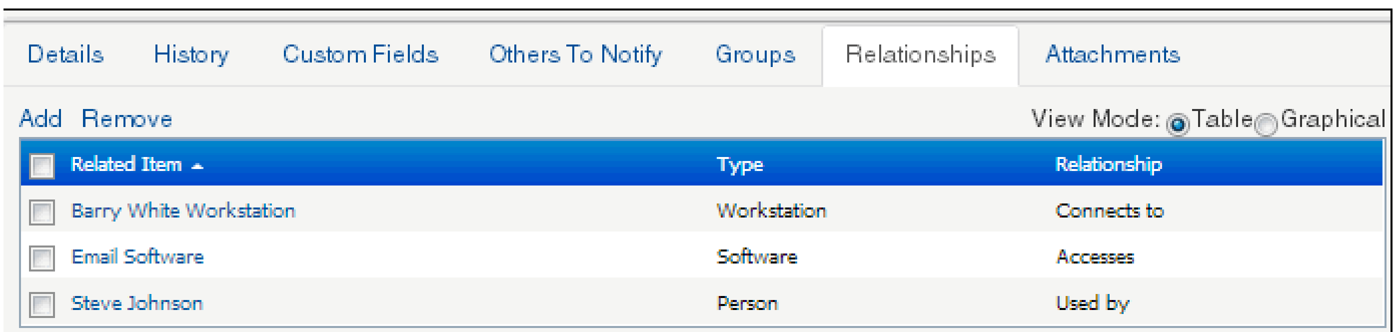
Use the Groups tab in the Configuration Item screen to assign a CI to a CMDB group defined in configuration. After you add one or more groups and save, the CI will be available only to members of the selected groups.



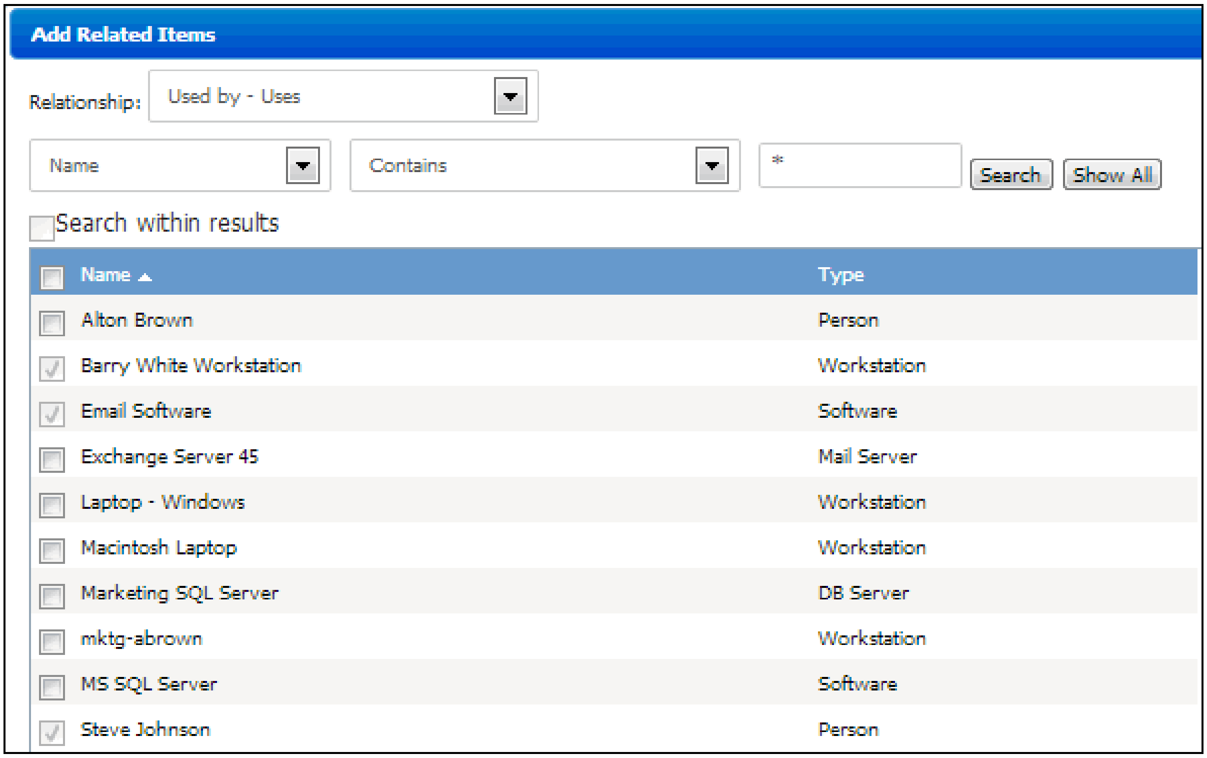
No Membership/Membership - The No Membership field includes CMDB groups set up in the Configuration module. To assign the CI record to a group, select the group in the No Membership field and select the right arrow. To remove the CI record from a group, select the group in the Membership field and select the left arrow.

Assigning Relationships

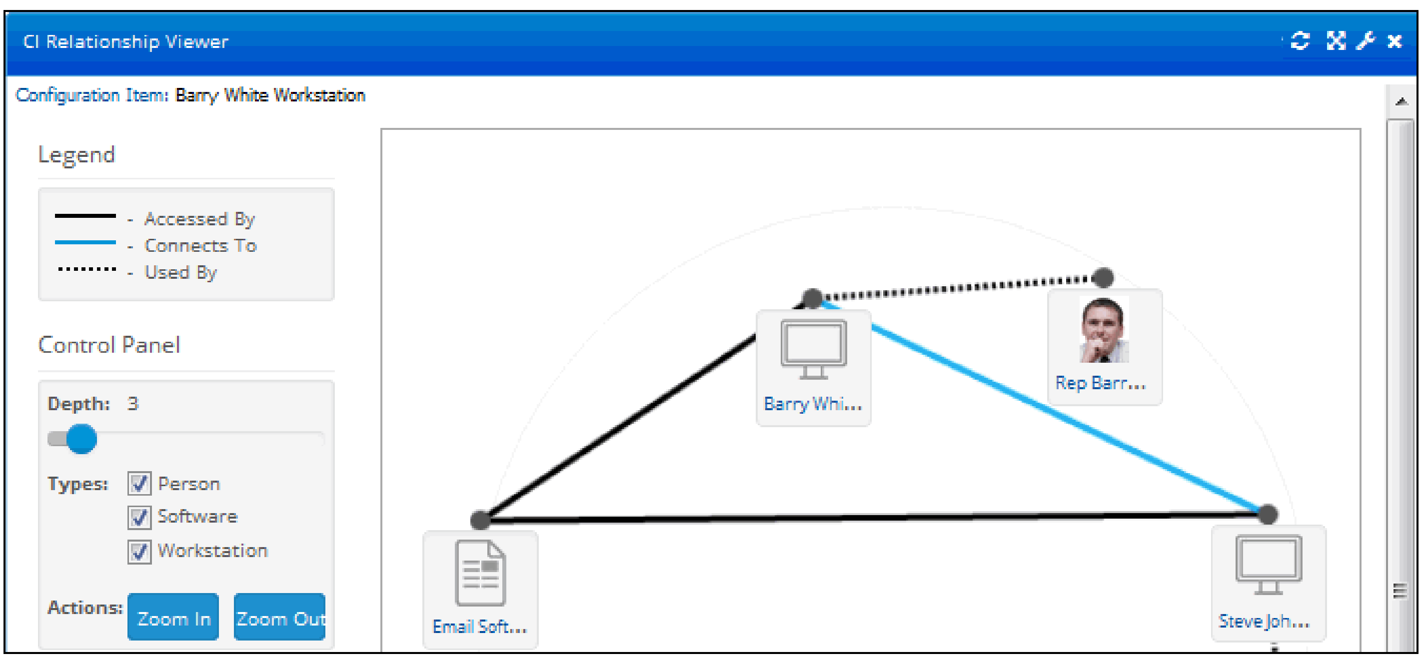
Use the Relationships tab to select relationships (defined in configuration) and configuration items and to be associated with the current CI record.



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.

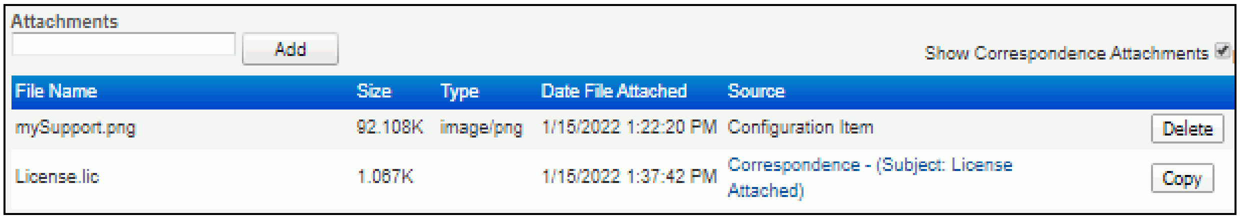


You can select the Graphical option in the View Mode field to display the Relationship Viewer, which displays the configuration items related to a specified configuration item as shown below. You can click on a different configuration item option to view its relationships, and refresh to go back to the original configuration item.



Attaching Files

To attach a file to the CI record, click on the Add button on the Attachments field and select the file. You can select the Show Correspondence Attachments checkbox to display attachments from all sent or received correspondence (including attachments from an inbound email update) associated with the record. A Copy button will be included next to correspondence attachments; you can use it to directly associate the attachment to the record.



Sending Correspondence

To send an email from the Configuration Item screen, select Correspondence. The Correspondence option in the History field displays entries for sent and received correspondence.

Generating QR Codes

Select Generate QR code in the toolbar to generate a QR code that contains a link that will display information about the record. Select the fields to include for the code in the Generate QR Code dialog and then select Generate; the QR code will appear. You can print it or click the Edit button to redisplay the fields for selection.

You can also use the QR code to add a configuration item to an incident, problem, or change via the mobile interface, but note that the QR code reader option for selecting a CI in the HTML5 mobile interface will be hidden if using an Android device.

Viewing Associated Items

Use options on the View menu to display incidents, problems, and changes associated with the configuration item.