Configuring iSupport® Categories

Overview

Categories are custom values that you create for support representatives and customers to use when describing an incident, problem, or change (if enabled). You can:

- Associate categories with **knowledge entries** for targeted knowledge searches from the Incident, Problem, and Change screens.
- Associate a **script** to display when a category set is selected. (However, if a call script is enabled for a category set, it will not display on the mySupport portal.)
- Associate **approval cycles** with categories; when an approval cycle is in effect most incident functionality is disabled until the cycle is complete.
- Restrict display of a category to members of support representative and customer **groups**. After you add one or more groups and save, the category will be available only to members of the selected groups. Note that group access permissions only restrict the ability to open a record for group members (unless a member is the current assignee); group access does not filter display of data in views, charts, and reports.
- If enabled in the Core Settings | Global Settings screen, associate an **Others to Notify** list of customers and support representatives not directly involved in the incident, problem, or change process to be sent notifications and correspondence whenever the category is selected. (For example, you could configure notifications to be sent to a printer vendor whenever an incident is created with a Printer category.)
- Associate **support representative skill levels** with categories. After a support representative classifies the incident, problem, or change and selects skill-based routing, a dialog will display listing the category levels selected for the incident; the support representative will select the level of categorization that exactly matches the categorization for which support representative skills should be searched.
- Associate a **correspondence template** to appear in the list for selection when the category is selected in the Incident, Problem, and Change screens.
- Associate an **incident, problem, and/or change rule group** with a category, to be applied when the category is selected for an incident, problem, or change. (Note that if the template or hierarchy template selected for the incident or change has a rule group, it will override any other rule group that may be associated with the incident or change's customer, category, or company. A setting in configuration determines what will take precedence if the customer and categorization both have a rule group.)
- If custom fields are enabled in the Incident Basics screen, associate **custom fields** that will appear when the category is selected. Note: If custom fields are associated with more than one level of a selected category set, the fields for all levels will display. The fields for configuring category-based custom fields are the same as regular custom fields, but you cannot individually place category-based custom fields on layouts and these fields are not listed as include field options for custom notifications. Category-based custom fields are, however, listed separately in the view designer data sources when creating views.
- Associate an incident, problem, or change **layout**.

The iSupport Setup Utility installs an initial set of categories based on a selected type used as a starting point: Customer Service, Facilities, HR, or IT. Several lower level categories can be selected for each type.

When planning your category structure, decide on a basic set that applies to all incidents, problems, and changes (if enabled). (All configured categories will appear in those screens for selection.) It is useful to chart your category structure to ensure that it is logical and complete; it may be helpful to use a large white board when brainstorming the category hierarchy.

About Category Levels

You can use up to five levels of categorization. Levels typically range from general to specific. The following table includes an example of a three-level category structure:

Level One	Level Two	Level Three
Hardware	Computer	Laptop
		Workstation
		Other
	Phone	Mobile
		Office
		Other
	Printer	Error
		Connection
		Other
Application	Accounting	Excel
		QuickBooks
		Other
	Email	Outlook
		Gmail
		Other

Using the category example above, a support representative taking a call for a printer error would choose Hardware as level one, Printer as level two, and Error as level three. If a support representative needs to be more specific about an issue, additional details can be entered in the Description field or a custom field.

An example of a five-level categorization is as follows:

Level one: Application
Level two: Accounting
Level three: QuickBooks
Level four: Integration
Level five: Error

Category Entry Guidelines

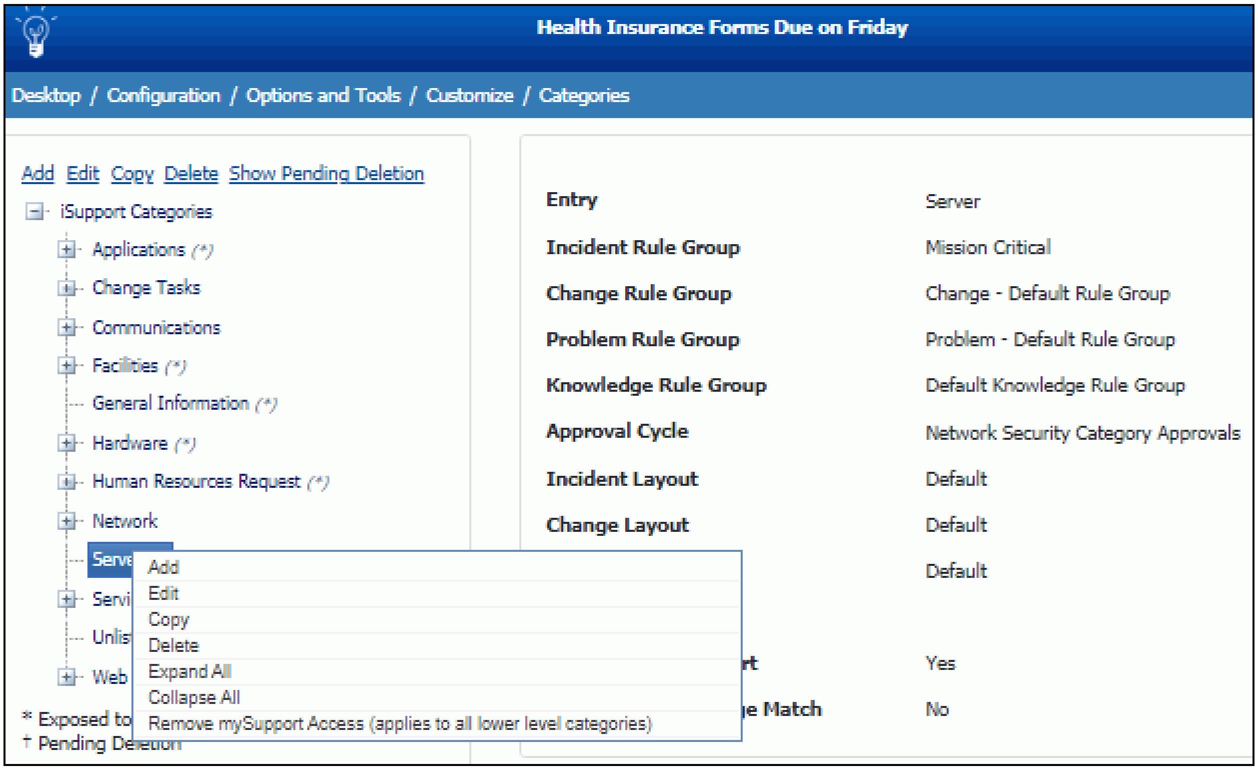
- Try to limit the number of level one entries.
- Include Other as a category for any miscellaneous items that do not fit into a specific category.
- You cannot use carriage returns in category entries.

Entering Categories

In the Categories screen:

- Select the level above the category level you wish to add; click the Add link. You can also right-click on the level above the category level you wish to add and select Add on the popup menu.

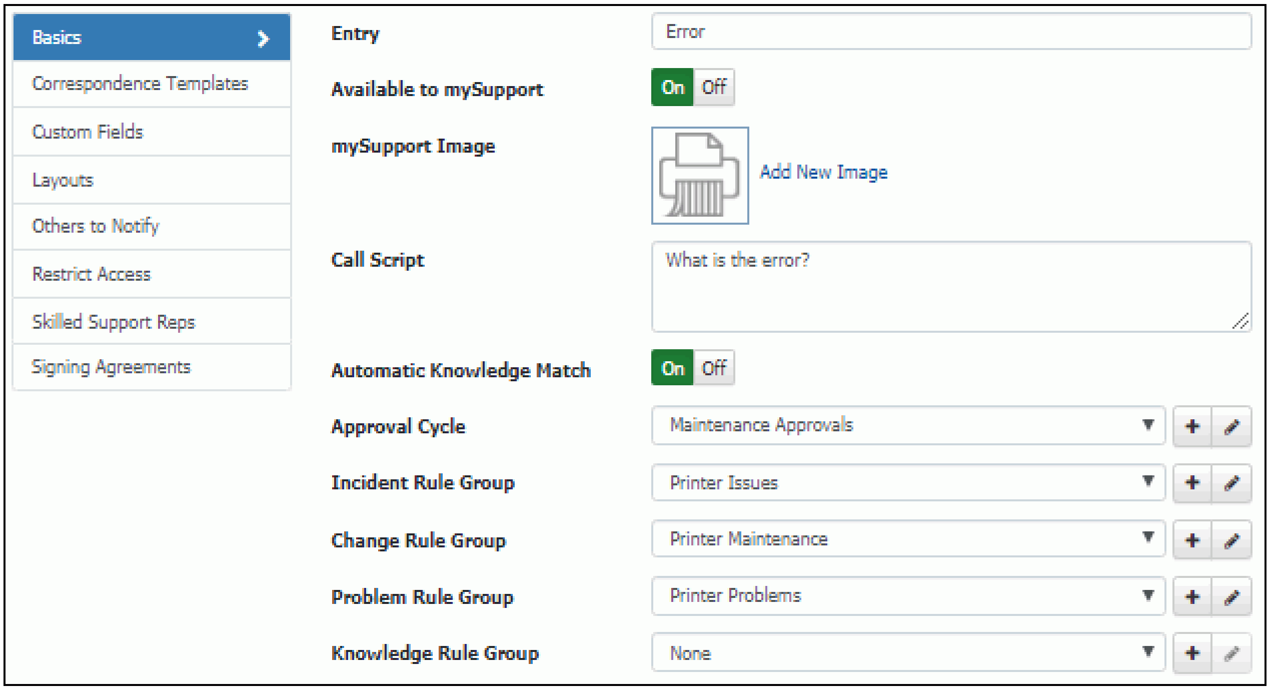
- To copy an existing category, select the existing category and click the Copy link. Then select the level above the category level you wish to add and click the Paste link. You can also right-click on the existing category, select Copy, right-click on the level above the category level you wish to add, and select Paste.



- To edit a category, select the category and click the Edit link or right-click on the category and select Edit on the popup menu.
- To move a category along with its lower level categories, click on the category and drag it to the desired place in the structure.
- To enable display of a category and its lower level categories on the mySupport portal, right-click on the category and select Add mySupport Access. Note that if mySupport access is applied to a lower level category, the mySupport access will also be applied to its upper level (parent) category.
- 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. When the Show Pending Deletion link is selected, records that are pending deletion will display with a cross symbol.

Configuring Basics

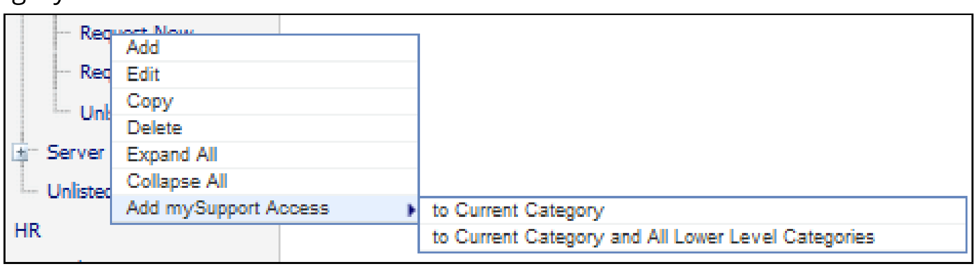
Use the Basics tab to enter a name, enable mySupport use, and associate an image, call script, approval cycle, and rule groups.



Entry - Enter the category name.

Available to mySupport - Select On to enable the category to appear on the mySupport portal. Note: All preceding category levels must be available to end users in order for this field to appear. When enabled for a category, an asterisk appears next to the category in the Categories Configuration screen.

You can also enable mySupport display for the current category and/or all lower levels if you right-click on the category in the category tree on the left.



mySupport Image - Select the image to display next to the category on the mySupport navigator.

Call Script - Enter the script to display when the category combination is selected in the Incident, Problem, or Change screen. The script dialog will be editable if the Automatically Place Call Scripts in Work History field is enabled on the Incident, Problem, or Change Fields tab in the Incident Basics screen. For consistency in presenting editable scripts, add a few spaces to the end of a script to easily distinguish between questions and answers. When a script is enabled for a category, a *(Script)* notation will appear next to the category in the Categories Configuration screen.

Automatic Knowledge Match - Select On to display of all matching knowledge entries in the view window at the bottom of the screen when a category is selected for an incident, problem, or change. A Capture Solution link will be included. Entries will appear for every level of the category set for which automatic knowledge search is enabled.

Approval Cycle - If approvals are enabled in the Enable Features screen, select the approval cycle to associate with the category. Use the Create New + and View/Edit icons to access the Approval Cycle screen.

Incident Rule Group - Select the incident rule group to associate with the category, to be applied when the category is selected for an incident. (Note that if an incident template or hierarchy template selected for the incident has a rule group, it will override any other rule group that may be associated with the incident's customer, category, or company. A setting in configuration determines what will take precedence if an incident's customer and categorization both have a rule group.) Use the Create New and View/Edit icons to access the Incident Rule Group screen.

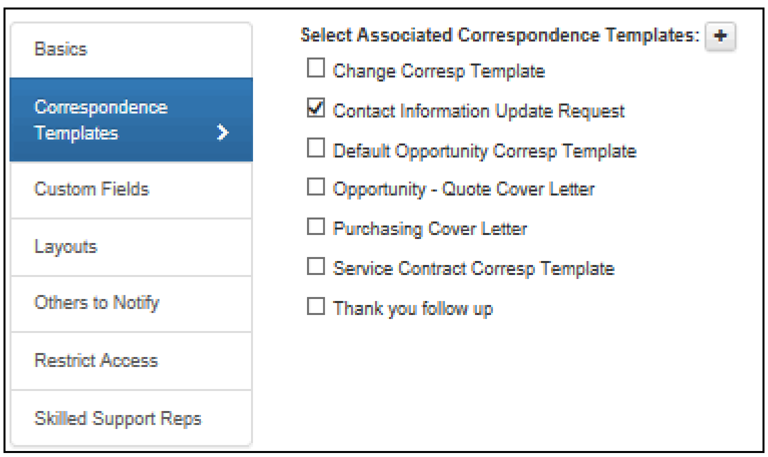
Problem Rule Group - Select the problem rule group to associate with the category, to be applied when the category is selected for a problem. Use the Create New and View/Edit icons to access the Problem Rule Group screen.

Change Rule Group - Select the change rule group to associate with the category, to be applied when the category is selected for a change. (Note that if a change template or hierarchy template selected for the change has a rule group, it will override any other rule group that may be associated with the change's customer, category, or company. A setting in configuration determines what will take precedence if a change's customer and categorization both have a rule group.) Use the Create New and View/Edit icons to access the Change Rule Group screen.

Knowledge Rule Group - Select the knowledge rule group to associate with the category, to be applied when the category is selected for a knowledge entry. You can use the Create New and View/Edit icons to access the Knowledge Rule Group screen.

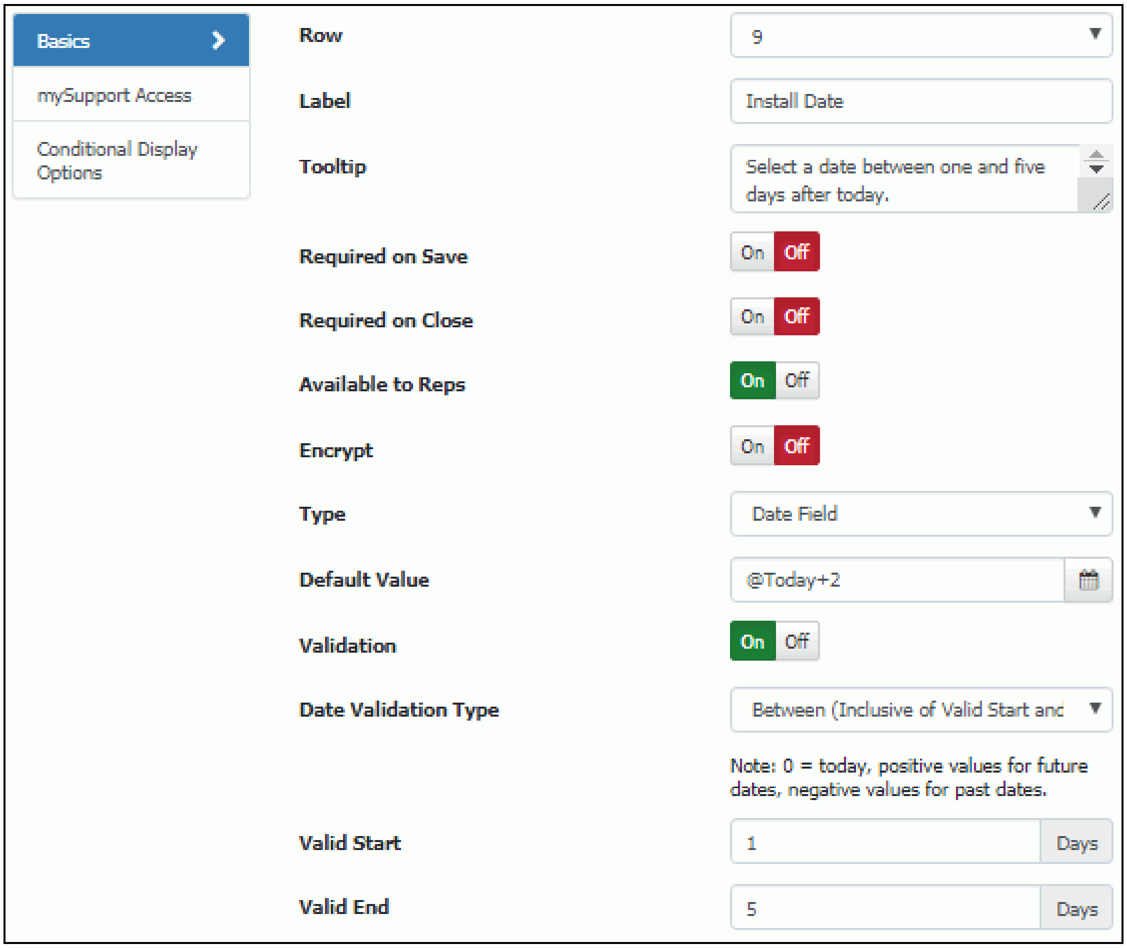
Associating Correspondence Templates

All predefined correspondence templates will appear on the Associated Correspondence Templates tab; if applicable, select the templates to appear in the list for selection when the category is selected in the Incident, Problem, and Change screens. (Correspondence templates that are not associated with any category will also appear in the list.)



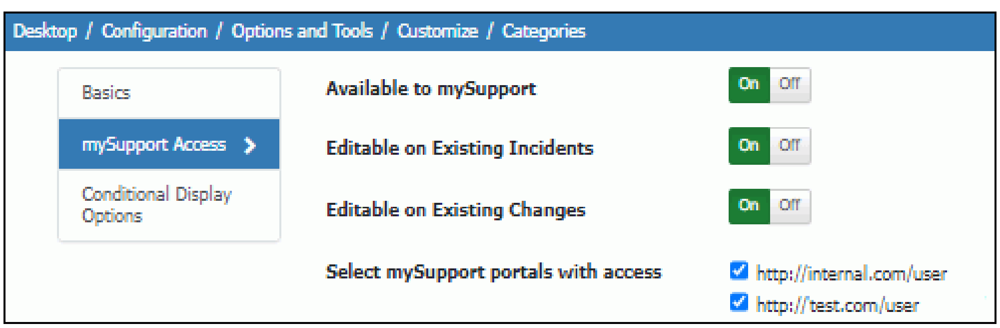
Creating Custom Fields for a Category

Click the Create button in the Custom Fields section to enter a field to display when the category is selected in the Incident, Problem, or Change (if enabled) screen. The fields for configuring category-based custom fields are the same as regular custom fields (see the online help for more information) and these fields are not listed as include field options for custom notifications. Category-based custom fields are, however, listed separately in the view designer data sources when creating views.



Enabling/Disabling mySupport Access

On the mySupport Access tab, select On in the Available to mySupport field and then use the mySupport Access tab to select the mySupport interfaces on which the field should appear. Note: If custom fields are associated with more than one level of a selected category set, the fields for all levels will display.



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

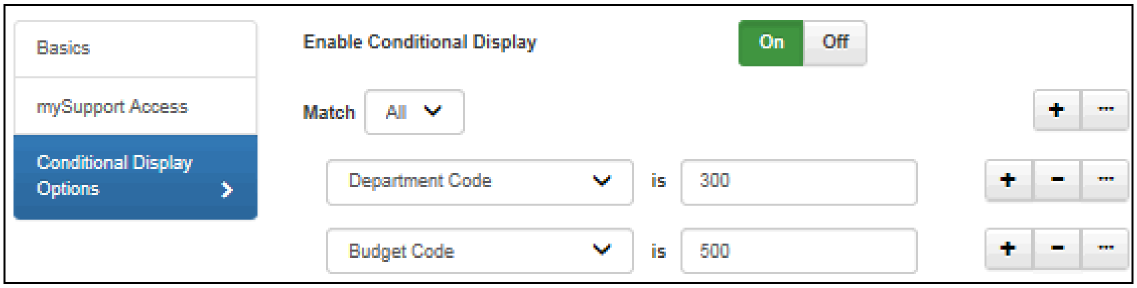
Editable on Existing Incidents - Select On to enable the field to be edited by customers with the mySupport Custom Fields Editor permission in their Profile record. Note: For hyperlink-type fields, On is the default value; when off, the default text and URL are validated and the Edit link is hidden in mySupport.

Editing on Existing Changes - Select On to enable the field to be edited by customers with the mySupport Custom Fields Editor permission in their Profile record.

Select mySupport Portals with Access - If the Available to mySupport field is enabled, select the mySupport portal interfaces on which the 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.

Enabling Conditional Display

If a custom field has been previously defined, the Enable Conditional Display field will appear on the Basics tab in the Custom Field Definition dialog; select On to display the Conditional Display tab for configuring conditions on which to base display of the custom field on the Basics tab.

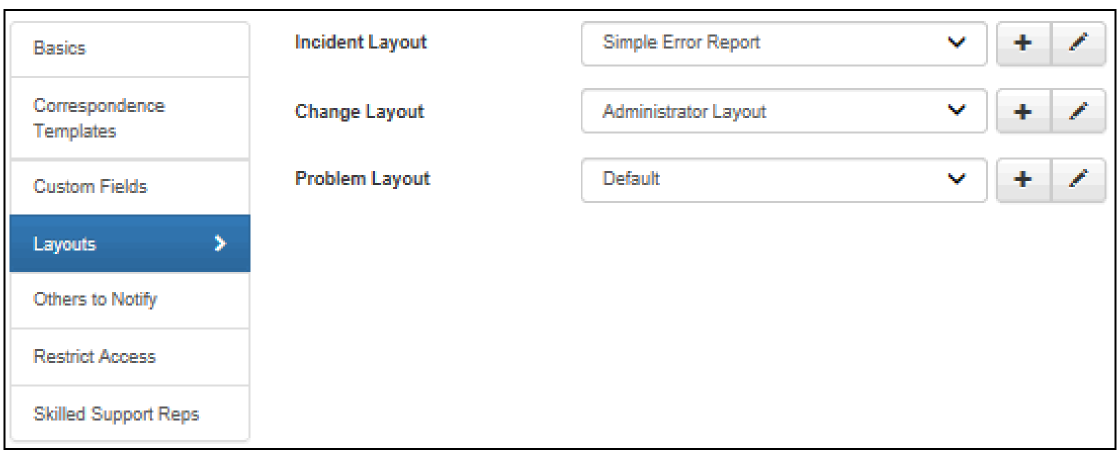


Use the Match *<All/Any>* field to specify whether you want **every** *<field>* is *<value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition and Remove Condition icons to display and remove a *<field>* is *<value>* search condition. Click the Add Condition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

In this example, the field will appear if the value in Department Code custom field is 300 and the value in the Budget Code custom field is 500.

Associating Layouts

Use the Layouts tab to assign a layout to appear when the category is selected in work item screens, as an image for the mySupport navigator.



Incident/Problem/Change Layout - Select the layout containing the fields and tabs that will display when the category is selected for an incident via the Incident screen. You can use the Create New and View/Edit icons to access the Incident Layouts configuration screen. The layout associated with the lowest level found will be used; if a layout is not found at the lowest level the next level up will be checked, and so on up to the top level. If no layout is associated at the top level, the default layout specified in the Layouts screen will be used. Layouts can be associated with a support rep group, customer group, incident template, or hierarchy template; the Order of Precedence field in the Incident Layouts screen determines which layout to use when more than one reference is applicable (for example, if the logged in rep's primary group has a layout as does the selected category).

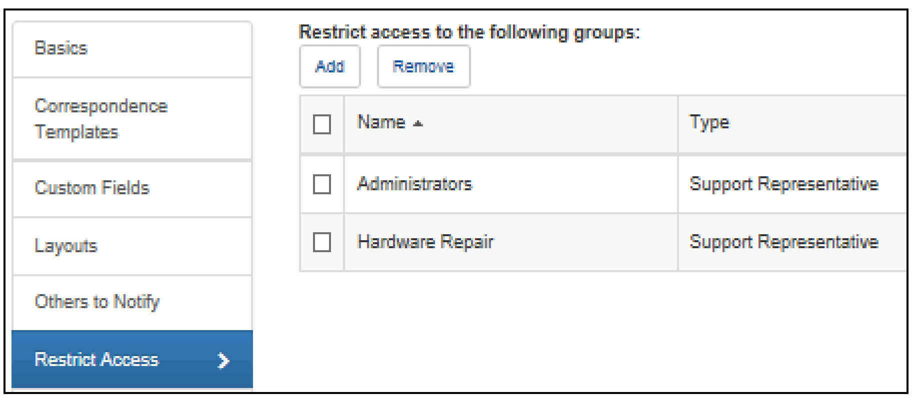
Designating Others to Notify for a Category

If Others to Notify is enabled in Global Settings, use the Add link to set up a list of customers and support representatives not directly involved in the incident, problem, or change (if enabled) process to be sent notifications and correspondence whenever the category is selected. (For example, you could configure notifications to be sent to a printer vendor whenever an incident is created with a Printer category.)

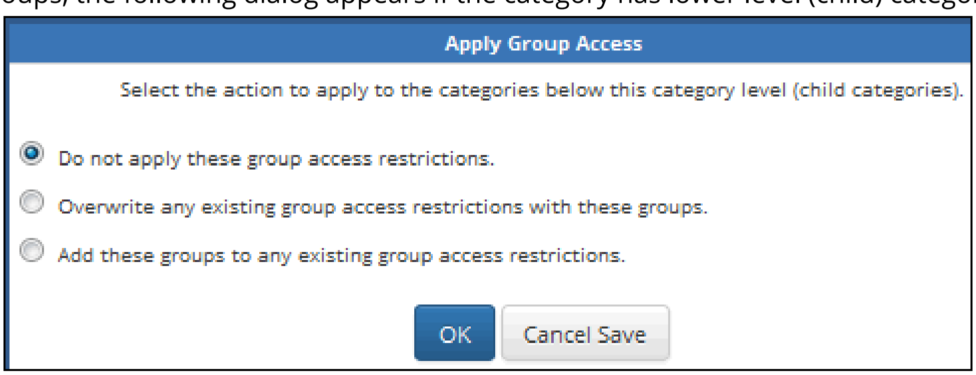
Others to Notify lists can also be set up for an individual customer, all customers in a company, and/or an individual incident, problem, change, or configuration item (if enabled). When correspondence and event notifications are configured to be sent to Others to Notify, all applicable (for an incident, problem, or change if enabled and its customer, the customer's company, and selected category) will be recipients.

Restricting Access

Use the Restrict Access tab to restrict display of a category to members of support representative and customer groups. ***After you add one or more groups and save, the category will be available only to members of the selected groups.*** Note that group access permissions only restrict the ability to open a record for group members (unless a member is the current assignee); group access does not filter display of data in views, charts, and reports.



After adding the groups, the following dialog appears if the category has lower level (child) categories.



Select:

- Do Not Apply These Group Access Restrictions to leave the lower level (child) categories as is, without applying the selected group access changes.

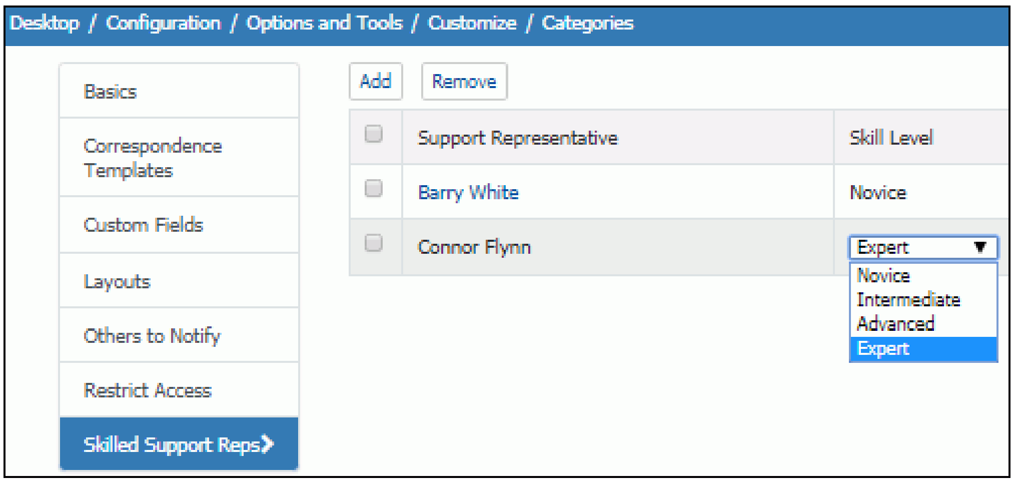
- Overwrite Any Existing Group Access Restrictions with These Groups to replace any existing group access restrictions on the lower level (child) categories with the selected group access changes.
- Add These Groups to Any Existing Group Access Restrictions to add the selected groups to any existing group access restrictions.

Members of the selected groups will appear on the Categories Configuration screen when the category is selected in the tree.

Designating Support Representative Skills

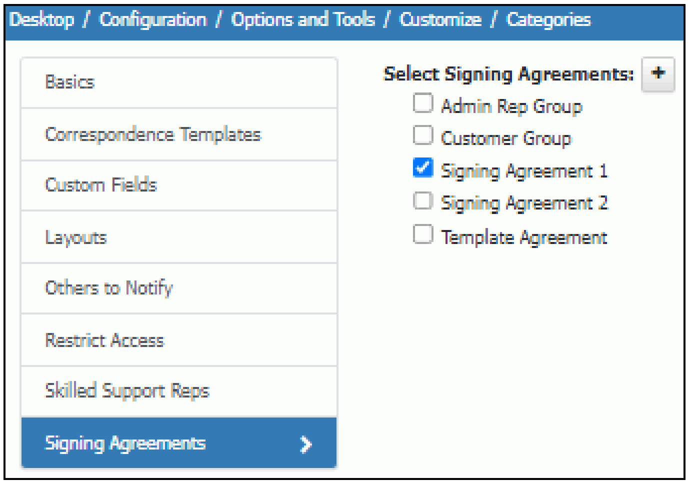
You can associate support representative skill levels with categories in both the Category screen and the Support Representative screen. After a support representative classifies an incident, problem, or change (if enabled) and selects skill-based routing, a dialog will display listing the category levels selected; the support representative will select the level of categorization that exactly matches the categorization for which support representative skills should be searched.

To assign predefined skills with the category, click the Add link on the Skilled Support Reps tab. A list of support representatives appears; select the support representatives to assign skills and click the Add button. The names of selected support representatives appear as links; to assign a skill level, click on the name of the support representative to display the dropdown list of skill levels set up in the Incident Basics screen.



Associating Signing Agreements

Use a signing agreement to display details in the Sign dialog in the Incident and Change work item screens. Signing agreements can be associated with customer and support representative groups, categories, and incident and change templates. If an incident or change involves more than one associated signing agreement (group, category, or template), all will be included in the Sign dialog in a dropdown for selection. (Note that “Blank” is also included for displaying no text above the signing line.) On the Signing Agreements tab, select the agreements to appear for selection in the dropdown when the incident or change involves the associated category. Use the plus sign icon to create an agreement via the Signing Agreements configuration screen.



Deleting a Category

To delete a category and all of its associated lower level categories, select the category and click the Delete link or right-click on the category and select Delete on the popup menu.