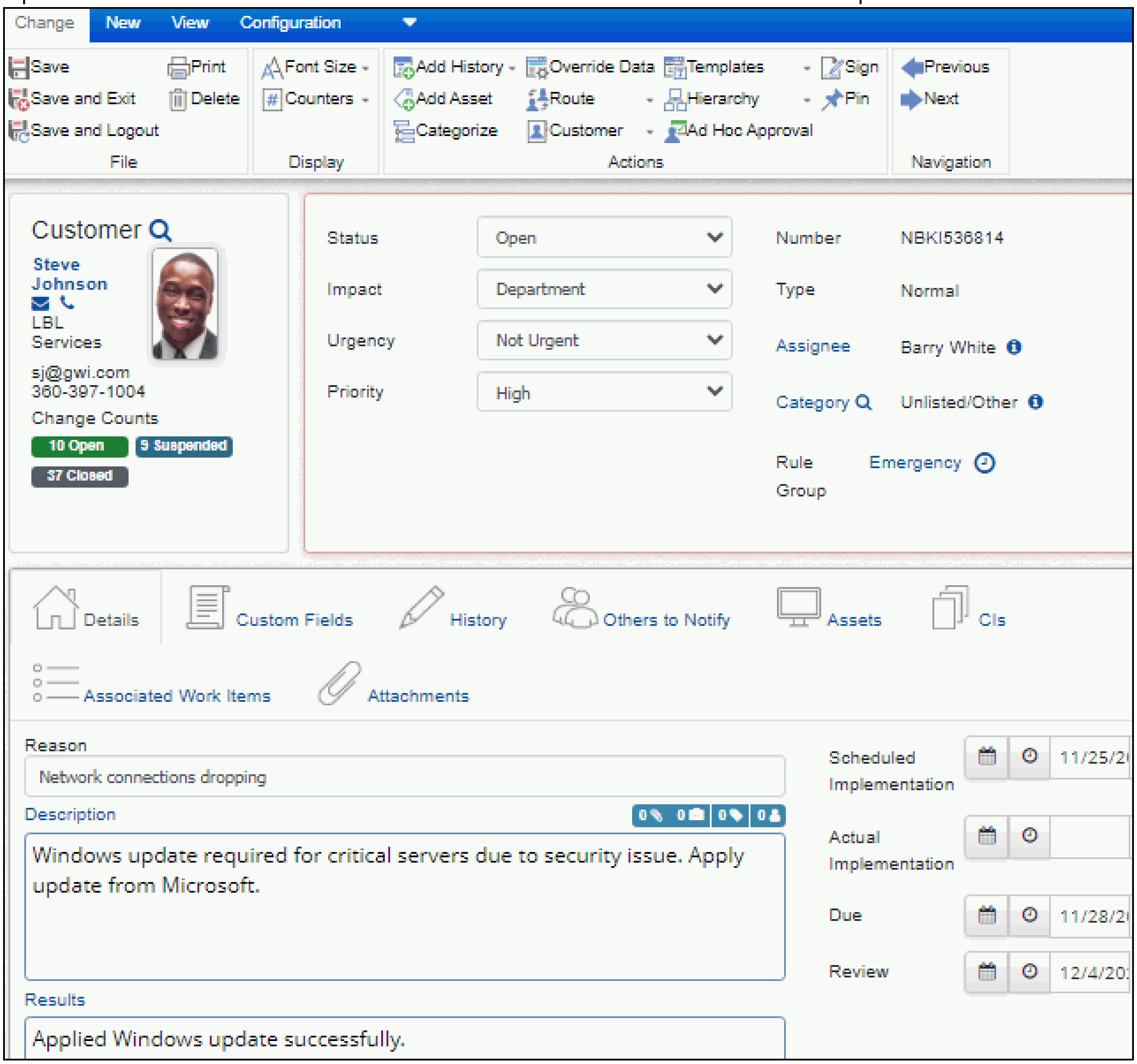
Configuring iSupport® Change Functionality

Change Management functionality is available if you have the Service Desk version of iSupport; use it to record and track requests related to services and assets and ensure that standard methods and procedures are used.



Configuration Overview

Basic Configuration

- Enable/disable Change functionality and set basic options in Feature Basics. See “Setting Change Basics Configuration Options” on page 4 for more information.
- Set up categories, which are custom values that you create for describing an Incident, Knowledge, Problem, or Change record. (Note that the same category set is used with all of those features.) A category combination is

required in order to save a Change record. Categories are involved in many features throughout iSupport, including reporting, displaying related work items, and more. See the online help for more information.

Creating Change Records

- You can manually create Change records via the Change screen as well as the Incident, Problem, and Purchase Request screens. See the online help for more information.
- Customers can submit an email that will create a Change record via email processing. See the online help for more information.
- Customers can submit changes via a mySupport portal. See the online help for more information.
- You can create a service catalog that will enable support reps and customers to submit changes via change templates. See the online help for more information.
- You can schedule a single occurrence change or a recurring set of changes to be created at a future date/time. See the online help for more information.

Customizing iSupport Defaults

- iSupport includes a default Change screen layout with a comprehensive set of fields for tracking Change data, but you can redesign it to include fields and tabs that are specific to your company. You can create different layouts to assign to support representative groups, customer groups, categories, change templates, and hierarchy templates. See “Configuring Screen Layouts” on page 36.
- You can create custom status labels for the Change status levels of Open, Closed, and Suspended. See “Defining Custom Status Labels” on page 21.
- If there are fields you need for the Change screen that are not included in iSupport by default, you can create custom fields. See “Configuring Custom Fields” on page 23.
- You can create different labels for the Standard, Normal, and Emergency Change types via the Options and Tools | Customize | Custom Change Types screen. You can create custom fields that will appear in the Change screen when the change type is selected. See “Setting Up Custom Change Types” on page 19.
- You can include a field for entering or automatically generating a custom number. See “Defining Custom Numbers” on page 30.
- You can define custom impact and urgency values that map to priority levels. Enable impact/urgency mapping via the Feature Basics screen. Note: defined impact and urgency values are also used in Incident and Problem functionality. See “Defining and Mapping Impact and Urgency Values” on page 33.
- You can enable your customers to submit and view Change records on mySupport portals, and you can customize the submission and display screen layouts. See “Configuring Screen Layouts” on page 36.

Sending Notifications

- You can use Change rules to send Desktop and email notifications when specified conditions based on Change record fields or events are met; for example, you can configure a rule to send a notification when the priority of a Change record is modified. See “Configuring Rules and Rule Groups for Changes” on page 48.
- You can use or copy and modify iSupport's default notifications, or you can create new custom notifications. You can include data from Change records and designate any applicable recipients. See the online help for more information. See “Customizing and Viewing Event Notification Content” on page 64.
- You can send correspondence email from the Change screen. Correspondence can include data from Change records; correspondence templates can be utilized, and an Others to Notify list can be used for keeping those not directly involved in the loop. See the online help for more information.
- You can add a discussion post to a selected feed from the Change screen. See the online help for more information.
- You can send a survey request to be completed by customers using mySupport. See the online help for more information.

- You can enable a single selection feedback survey with a question with two response choice image links in a change notification. See "Creating Feedback Questions" on page 10 for more information.

Using Workflow Features

- You can route via name, skill, group, and location, all with or without load balancing, in the Change screen. Enable routing methods via Feature Basics. See "Setting Change Basics Configuration Options" on page 4 for more information.
- You can use Change rules to automatically route Change records via round robin or load balancing. See "Configuring Rules and Rule Groups for Changes" on page 48.
- You can automatically change field values on Change records via Change rules. See "Configuring Rules and Rule Groups for Changes" on page 48.
- You can create templates to populate fields for common and reoccurring changes; see "Configuring Change Templates" on page 69. You can also create hierarchy templates for tasks that have multiple activities; see "Configuring Change Hierarchy Templates for Workflow Tasks" on page 77. Both types of templates can be applied manually via the Change screen or via Change rules.
- You can require a Change record to be approved before most functions can be performed. Approval cycles are initiated via Change rules. See "Configuring Rules and Rule Groups for Changes" on page 48.
- You can create related changes for a Change record; when you close the original change, all related changes can be closed automatically. See the online help for more information.
- You can associate new and existing Asset records. You can also associate new and existing Incident, Problem, and Purchase records, enable associated incidents and problems to be closed when a Change record is closed.
- You can perform ad hoc scans on non-Windows SNMP-enabled devices in the Change screen, and associate scans with a change. See the online help for more information.
- You can use webhooks to post Change data to a web application via Change rules. See "Configuring Webhooks" on page 115.
- You can associate configuration items to utilize data in Change records for views, reports, and correspondence. A CMDB contains configuration items (CIs) for the resources to be tracked and the relationships between those items. Enable CMDB functionality via the Core Settings | Feature Basics screen; see the online help for more information.
- You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Zoom, and Microsoft 365 Teams to display an option in the Change screen for initiating a meeting. See "Configuring Calendar and Meeting Integrations" on page 106 for more information.
- You can configure signing agreement text for inclusion in the Sign dialog in the Change screen. Signing agreements can be associated with customer and support representative groups, categories, and incident and change templates. Note that this feature is not available in mySupport. See "Configuring Signing Agreements" on page 105.

Managing Change Records

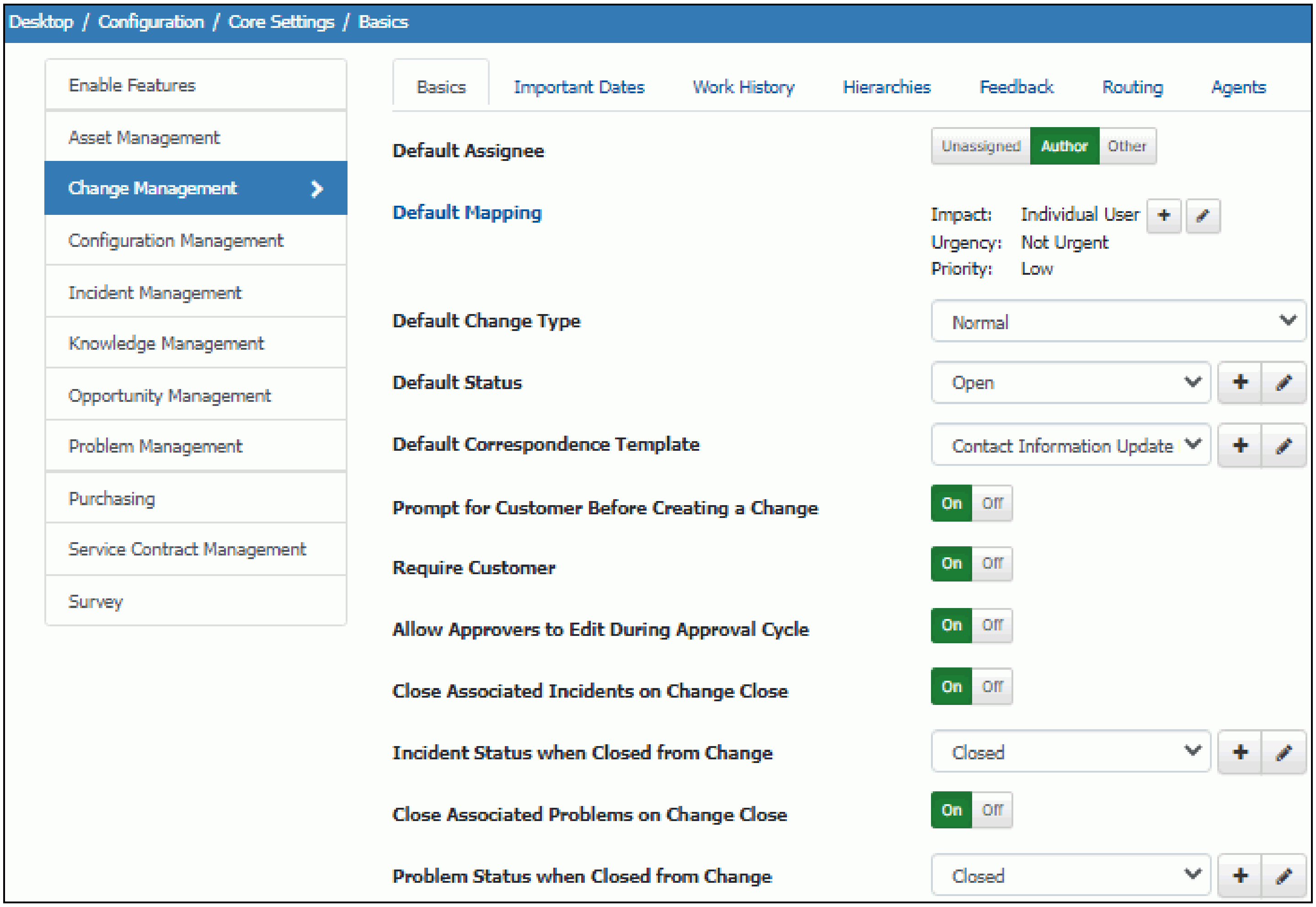
- You can use the Action menu in the View component on the Desktop to perform actions such as opening and routing multiple items. See the online help for more information.
- You can configure roles/permissions for support reps and rep groups using Change functionality via the Support Representatives screen. See the online help for more information.
- You can use service contract functionality to track and restrict changes associated with customers, companies, and assets. See "Setting Service Contract Feature Basics Options" on page 16.
- You can archive changes. See the online help for more information.

Setting Change Basics Configuration Options

The Change Basics screen enables you to set options for work history (see page 7), hierarchies (see page 9), feedback (see page 10), routing (see page 11), and agents (see page 15).

Completing the Basics Tab

Use the fields on the Basics tab to set miscellaneous configuration options.



Default Assignee/Select Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field.
- Author to assign newly-created Change records to the person who created the change.
- Other to designate a support representative to be assigned newly-created Change records.

Default Mapping - Click this link to select the Impact, Urgency, and Priority to display by default in the Impact, Urgency, and Priority fields in the Change screen. Use the Create New and View/Edit options to access the Impact and Urgency Mappings screen.

Default Change Type - Select the change type to display by default in the Change screen. You can use the Custom Change Type tab to create different labels for the Standard, Normal, and Emergency change types.

Default Status - Select the Open status level to display by default in the Change screen. Use the Create New and View/Edit options to access the Custom Status Labels screen.

Default Correspondence Template - Select the correspondence template that will apply by default when a support representative initiates a correspondence via the Change entry screen. Correspondence templates that are active and enabled for the Change module will be available for this feature. Use the + Create New and View/Edit options to access the Correspondence Template screen.

Prompt for Customers Before Creating Change - Select Yes to display a customer selection dialog when a change is initially created.

Require Customer - Select Yes to require a customer to be selected before a Change record can be saved.

Allow Approvers to Edit During Approval Cycle - Select Yes to enable support representatives designated as approvers (or those with Approval Override) to have access to all functionality except Status in records in an approval cycle. You can configure the Pending Change Updated notification to be sent when the Edited During Approvals event occurs; see "Creating Rules" on page 50 and "Configuring Approval Cycles" on page 98 for more information.

Close Associated Incidents on Change Close - Both the Incident and Change screens include options for associating incidents with a Change record. Select:

- Yes to automatically close any associated incidents when a Closed status is selected for a Change record. The text in the Results field will be used as default for the incident resolution, but a dialog will appear when the Change record is closed for editing it.
- No to retain the Open status for associated incidents.

Incident Status When Closed From Change - Select the status to assign to any associated incidents that are closed when a Change record is closed. Use the + Create New and View/Edit options to access the Custom Status Labels screen.

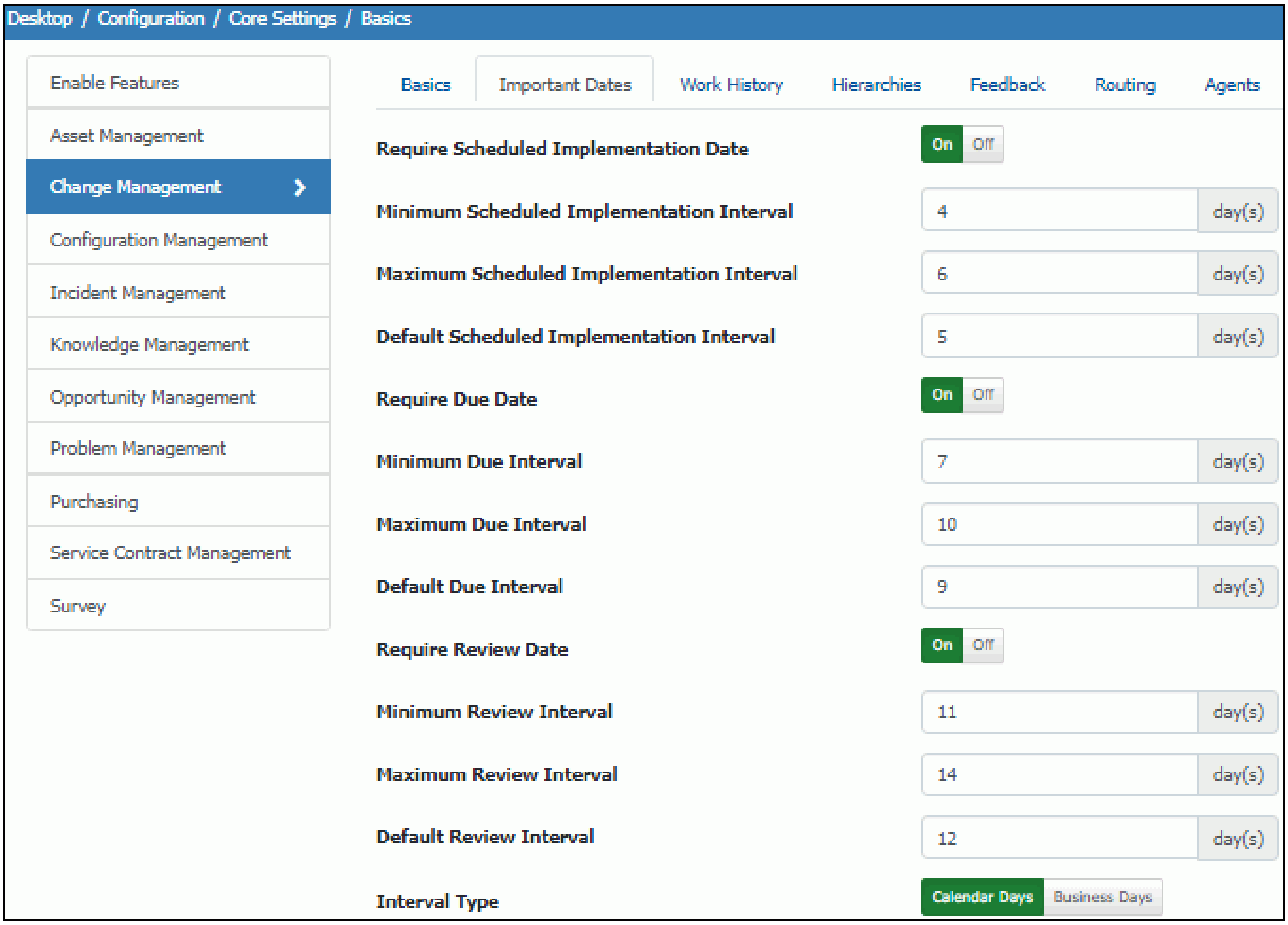
Close Associated Problems on Change Close - Both the Problem and Change screens include options for associating a Problem record with a Change record. Select:

- Yes to automatically close the associated Problem record when a Closed status is selected for a Change record. The text in the Results field will be used as default for the Problem resolution, but a dialog will appear when the Change record is closed for editing it.
- No to retain the Open status for the associated Problem record when a Change record is closed.

Problem Status When Closed From Change - Select the status to assign to the associated Problem record that is closed when a Change record is closed. Use the + Create New and View/Edit options to access the Custom Status Labels screen.

Important Dates

Use the settings on the Important Dates tab to configure the Scheduled Implementation, Actual Implementation, Review, and Due Date fields in the Change record entry screen. You can require entries in those fields and set minimums, maximums, and defaults for the calculation of the date to display in those fields. The Scheduled Implementation, Review, and Due Date fields are tied to notification functionality; warning notifications may be sent to configured recipients a specified number of hours before the date entered in these fields, and notifications may be sent to configured recipients after the date entered in these fields has passed.



Require Scheduled Implementation Date - Select On to require an entry in the Scheduled Implementation Date field in order for a Change record to be initially saved.

Minimum Scheduled Implementation Interval - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Scheduled Implementation field in the Change screen.

Maximum Scheduled Implementation Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Scheduled Implementation field in the Change screen.

Default Scheduled Implementation Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Scheduled Implementation field in the Change screen. You can set up notifications to be sent to specified recipients prior to the Scheduled Implementation date and after the Scheduled Implementation date has been exceeded.

Require Due Date - Select On to require an entry in the Scheduled Implementation Date field in order for a Change record to be initially saved.

Minimum Due Interval - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Due field in the Change screen.

Maximum Due Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Due field in the Change screen.

Default Due Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Due field in the Change screen. You can set up notifications to be sent to specified recipients prior to the Due date and after the Due date has been exceeded.

Require Review Date - Select On to require an entry in the Rev Date field in order for a Change record to be initially saved.

Minimum Review Interval - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Review field in the Change screen.

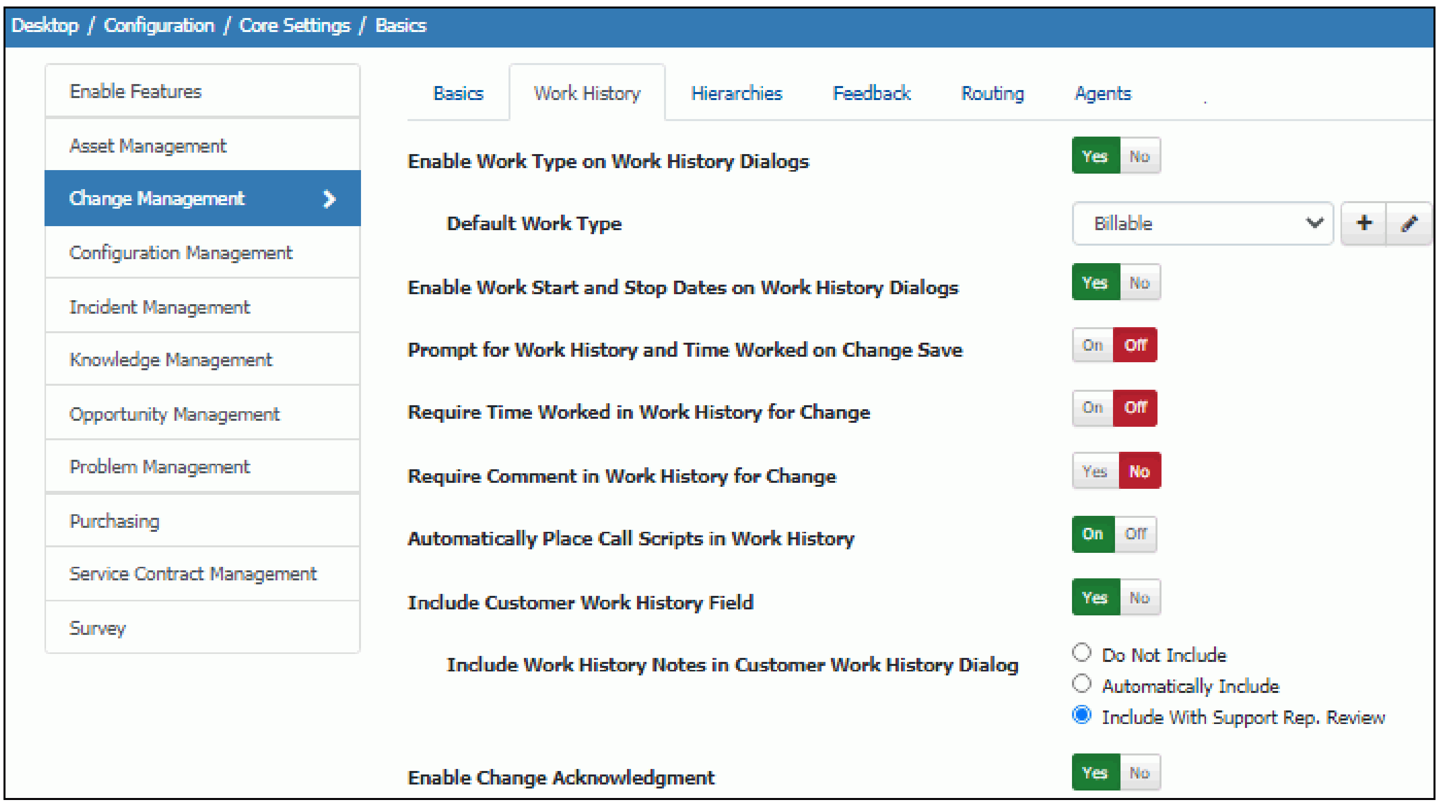
Maximum Review Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Review field in the Change screen.

Default Review Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Review field in the Change screen. You can set up notifications to be sent to specified recipients prior to the Review date and after the Review date has been exceeded.

Interval Type - Select the basis for the default scheduled implementation, default review, and default due intervals: calendar days or business days.

Work History

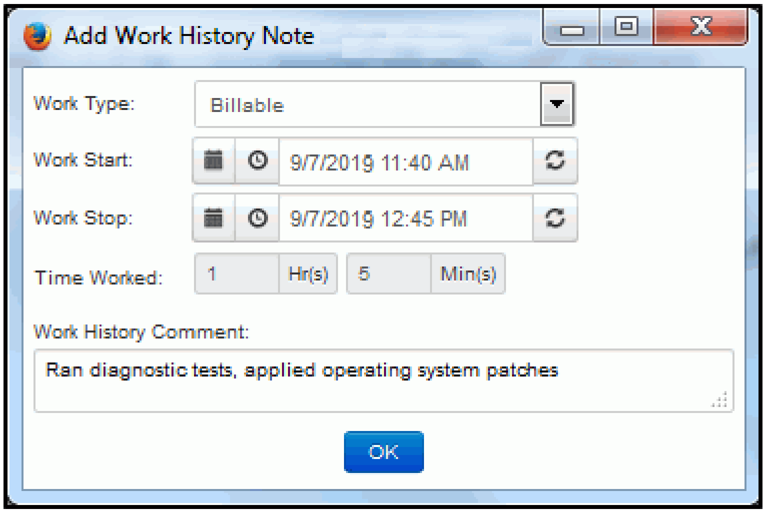
Use the Work History tab to set options for the Work History and Save dialogs in the Change screen.



Enable Work Type on Work History Dialogs - Select Yes to include a Work Type field in the Work History dialog in the Change screen.

Default Work Type - If the Work Type field is enabled, select the work type to appear by default in that field. Use the + Create New and View/Edit options to access the Work Types entry screen; see "Configuring Work History Types" on page 35.

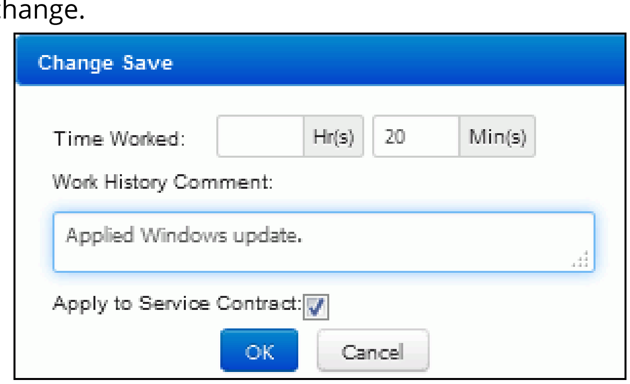
Enable Work Start and Stop Dates on Work History Dialogs - Select Yes to include Work Start and Work Stop fields in the Work History and Change Save dialogs in the Change screen.



The Work Start field defaults to the date and time the support representative loaded the work item. The Work Stop field defaults to the current time, but there will be at least a one minute gap between the Start and Stop times. For example, if a new Change record is opened at 1:00 PM, the support representative works with the customer for 30 minutes, and then clicks the Add Work history option or saves and displays the Save dialog, the Work Start would be set to 1:00 PM and the Work Stop would be set to 1:30 PM. This Time Worked field would show the 30 minutes of time worked reflected by the gap.

Support representatives can type directly in the Work Start and Work Stop fields or use the calendar and clock options to select the date and time; the difference will populate automatically. The refresh option will set the date and time to the current date and time (but the Work Stop date and time will adjust to be at least one minute past the Work Start date and time).

Prompt for Work History and Time Worked on Change Save - Select Yes to display the Save dialog every time a support representative saves a change.



Require Time Worked in Work History for Change - Select Yes to require an entry in the Time Worked field in the Change dialog before the record can be saved.

Require Comment in Work History for Change - Select Yes to require an entry in the Work History Comment field in the Change Save dialog before the record can be saved in the Change screen.

Automatically Place Call Scripts in Work History - Select Yes to, when a call script is used, automatically include the entire call script in the Work History field. This will also make the call script editable when it appears. Call scripts are entered and associated with categories in the Category entry screen. If you select No in this field, the call script will not be editable.

Include Customer Work History - Select Yes to include a field on the Change screen that includes work history notes for display when customers view their changes on the mySupport portal. The field will include basic change events, and can include:

- A Customer Work History dialog

- The contents of the Work History field, without review by the support representative
- The contents of the Work History field, edited by a support representative.

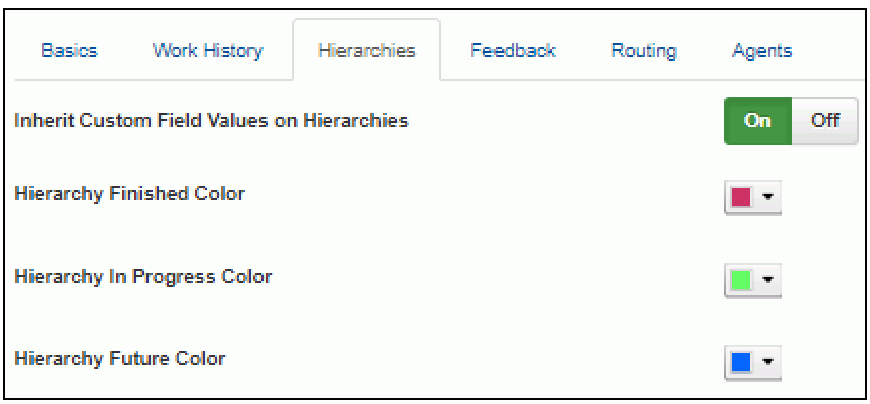
  Include Work History Notes in Customer Work History Dialog - This field appears if including the Customer Work History field. Select:

- Do Not Include to prevent Work History field entries from inclusion in the Customer Work History field. Only information on basic change events will be included.
- Automatically Include to fill the Customer Work History field with the contents of the Work History field, without review by a support representative.
- Include With Support Rep. Review to fill the Customer Work History field with the contents of the Work History field and enable the support representative to edit it before including it in the Customer Work History field.

Enable Change Acknowledgment - Select Yes to display an alert bar for new assignees to acknowledge changes that have been: created or saved from the mySupport portal or email, routed manually or automatically via a rule, created via direct entry with an assignee different from the current support representative, or created via direct entry with either a change or hierarchy template. When the assignee opens the change, an alert bar will appear at the top of the screen that states: "This change was routed to you. Click to acknowledge that you have received this change." When the support representative clicks the Acknowledge button, an entry will be recorded in the Audit History field. You can enable the Change Acknowledgment notification to be sent when a change is acknowledged.

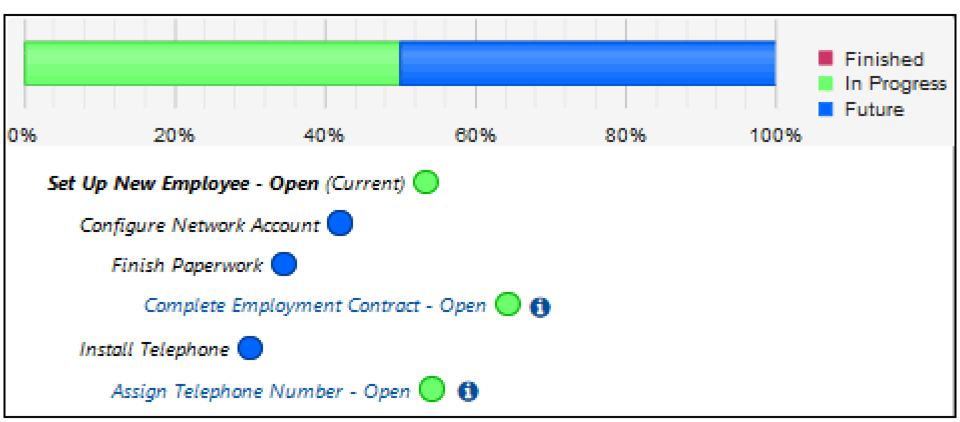
Configuring Options for Change Hierarchies

Use the Hierarchies tab to set options for changes created by hierarchy templates



Inherit Custom Field Values on Hierarchies - Select Yes to, when custom fields are associated with a category or change, pass the values in those fields to changes created by hierarchy templates. See “Configuring Custom Fields” on page 23 for information on configuring custom fields; see “Configuring Change Hierarchy Templates for Workflow Tasks” on page 77 for information on configuring change hierarchy templates.

Hierarchy Finished/In Progress/Future Color - Select the colors for the dot icons and portions of the graphic in the Related Hierarchy field that represent the percentage of work that has been completed, is in progress, and is pending due to dependencies.



Creating Feedback Questions

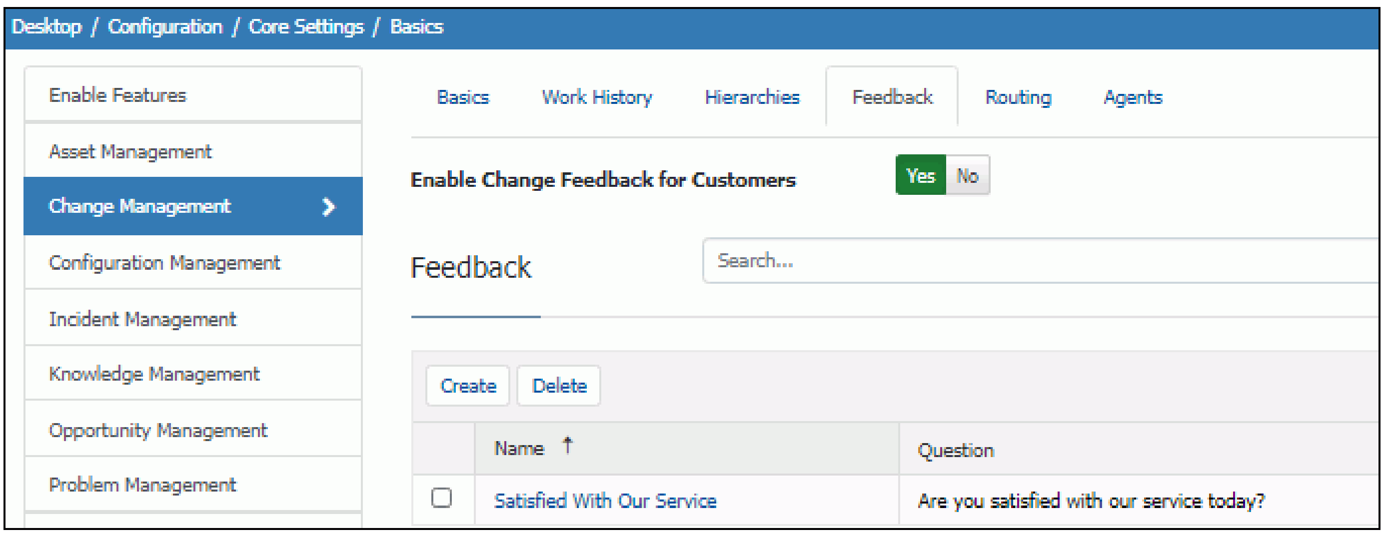
The Change Feedback feature enables you to create one or more questions, each with two response choice image links, for inclusion at the bottom of a change notification, based on a configured rule. When the email is received and one of the responses is clicked, the feedback question and response will be included in the Feedback field on the change. An example is shown below.

Configured Feedback Submitted text will appear to the user on a page on the mySupport portal; if more than one mySupport portal is configured, the default mySupport portal URL will be used.

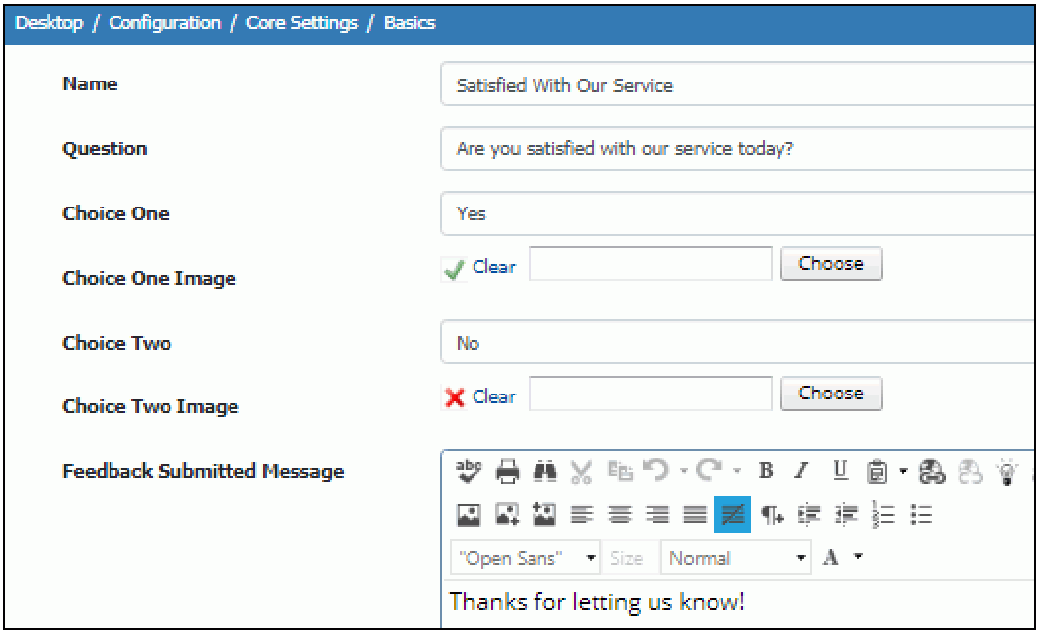
Note that only one feedback response can be set per work item; if more than one feedback request is sent related to a single work item, only the last feedback entered will display in the feedback question and response fields. Audit history will reflect all provided feedback questions and responses.

In the rule that will send the notification including the feedback question, enable inclusion of the feedback and select the question and notification. Note that this feature is intended for HTML-type mail delivery. Feedback audit history is included in the Configuration Audit Tracking screen.

Enable Change Feedback for Customers - Select Yes to enable the Incident Feedback feature. Use the Create button to create a feedback question.



Enter the name, text of the question, response choices and images, and message to appear after a selection is entered.



Name - Enter the name to assign to the question.

Question - Enter the question text to be included in an incident notification (configured via the Rule screen).

Choice One/Image - Enter the text for the first response choice and select the image to appear after the question text in the notification.

Choice Two/Image - Enter the text for the second response choice and select the image to appear after the first feedback choice image in the notification.

Note that the images will only be used in the outbound notification. The feedback choice text will appear as hover text for the image in the notification and if selected will be used as the response in the Feedback field on the change.

Feedback Submitted Message - Enter the text to appear on a mySupport portal page when the user clicks on a feedback choice image on an incident notification.

Enabling Routing Methods

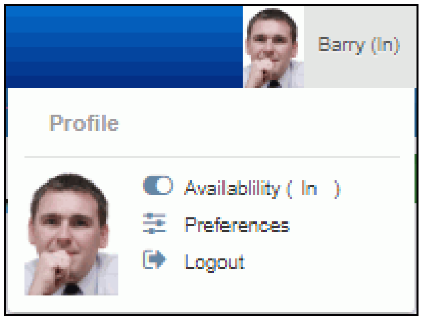
To set up routing:

- On the Routing tab, select the routing methods and enter skill levels and routing weights.
- If using location-based routing, set up locations in the Core Settings | Support Representatives | Locations screen.
- If using skill-based routing, set up categories in the Options and Tools | Customize | Categories screen and designate skills for support representatives in the Category screen or Support Representatives | Skills screen.
- If applicable, set up notifications in the Options and Tools | Automate | Rules screen.
- Set routing availability options for support representatives via the Core Settings | Support Representatives screen.

Note that routing availability can be controlled via:

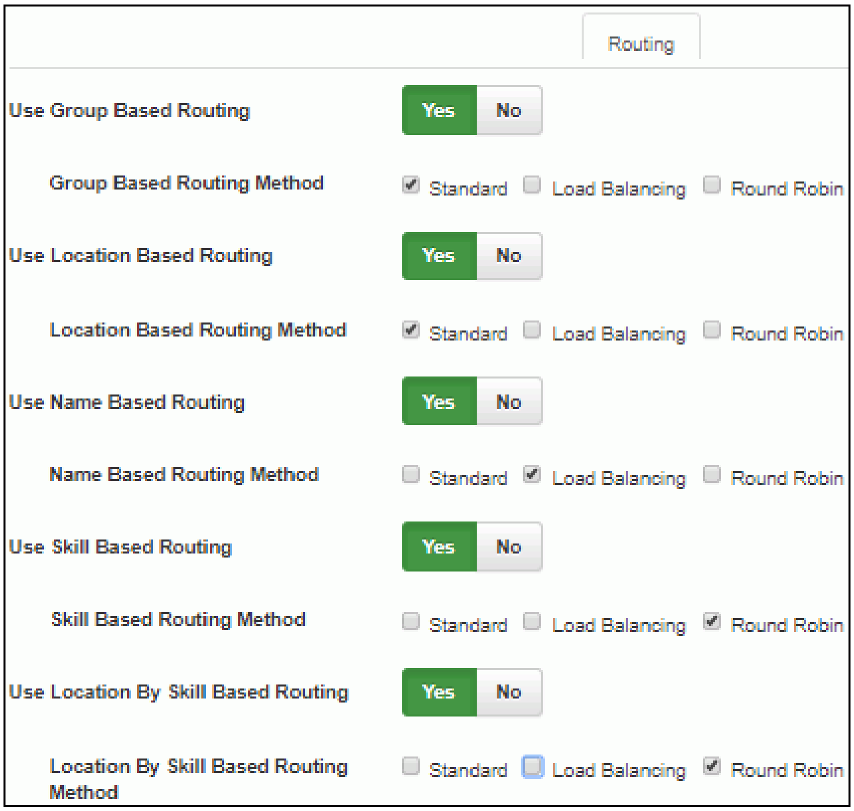
- Scheduling and other options on the Routing Availability tab in the Support Representative Profile screen.

• If enabled, the Availability (In/Out) option on the Profile menu that appears after clicking a support representative's avatar/name on the Desktop.



• The Rep Manager Desktop component.

Use the Routing tab in the Basics screen to specify the type of routing to be used, the skill level labels, and load-balanced routing weights. If you enable more than one routing method, the support representative can choose the method when the change route is initiated.



All routing methods can also include load balancing, which involves weights based on change priority.

• For group, location, or name based routing with load balancing, the available support representative for the method with the lightest overall workload will be selected. (For example, if using group-based routing, the available support representative within the selected group with the lightest overall workload will be selected.)

• For skill-based routing with load balancing, after the categorization level is selected, a support representative is selected based on the workload of the support representatives who have the exact match of the selected categorization in their Support Representative record.

  If a support representative has worked with a change and the change is reassigned, he/she will be bypassed until all available support representatives with the skill or in the group or location (depending on the method selected) have worked with the change. If all support representatives have the same weight for their changes, a random choice is selected for the assignee.

Note that rules can route changes via load-balancing or the round robin method.

Use Group Based Routing - Select Yes to enable changes to be routed to available support representatives that are set up in groups. In the Change screen the support representative will select a group and then an assignee from a list of all available support representatives in that group. Use the Group screen to set up groups and the Support Representative screen to assign support representatives to groups. A support representative can be a member of more than one group.

Group Based Routing Method - This field appears if using group based routing. Select:

- Standard - enables the support representative to select a group and then an assignee from a list of all available support representatives in that group. Groups are designated for support representatives in their Support Representative record.
- Load Balancing - allows the system to select a support representative based on current open change statistics, including weights based on change priority. The available support representative within the selected group with the lightest overall workload will be selected.
- Round Robin - the support representative in the group who was assigned a change using the round robin method on the oldest date and time is selected.

Use Location Based Routing - Select Yes to enable location based routing, which enables the support representative to select a location and then an assignee from a list of all available support representatives in that location. Locations are specified for support representatives in their Support Representative record or in the Location configuration screen. You can associate support representative locations with customer groups for location-based routing of changes submitted via the mySupport portal and email.

Location Based Routing Method - This field appears if using location based routing. Select:

- Standard - allows the support representative to select from a list of all available support representatives listed by the location entered in support representative profiles.
- Load Balancing - routes changes based on current open change statistics, including weights based on change priority. The available support representative within the selected location with the lightest overall workload will be selected.
- Round Robin - the support representative in a selected location who was assigned a change using the round robin method on the oldest date and time is selected.

Use Name Based Routing - Select Yes to enable name based routing, which enables the support representative to select an assignee from a list of all available support representatives regardless of group.

Name Based Routing Method - This field appears if using name based routing. Select:

- Standard - allows the support representative to select from a list of all available support representatives.
- Load Balancing - routes changes based on current open change statistics, including weights based on change priority. The available support representative with the lightest overall workload will be selected.
- Round Robin - the support representative who was assigned a change using the round robin method on the oldest date and time is selected.

Use Skill Based Routing - Select Yes to enable skill based routing, which uses the change categorization to select qualified support representatives. After a support representative classifies the change and selects skill-based routing, the category levels selected for the change will appear; the support representative will select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative(s) that have those skills configured in their profile will appear for selection.

Skill levels are associated with category combinations in the Support Representative screen.

Skill Based Routing Method - This field appears if using skill based routing. Select:

- Standard - allows the support representative to select the level of categorization that exactly matches the categorization for which support representative skills should be searched. Support representatives with that categorization in their Support Representative record would be displayed for assignment.
- Load Balancing - selects assignees based on the change categorization and current open change statistics, which include weights based on change priority. The support representative selects the level of categorization for which support representative skills should be searched, and a support representative is selected based on the

workload of the support representatives who have the exact match of the selected categorization in their Support Representative record.

- Round Robin - allows the support representative to select the level of categorization for which support representative skills should be searched; support representatives who have the exact match of the selected categorization in their Support Representative record are considered. The support representative who was assigned a change using the round robin method on the oldest date and time is selected.

Routing begins with skill based routing level one, and then advances to the next skill based level. If multiple support representatives have the same skill level, the load balanced routing weights are used.

Use Location By Skill Based Routing - Select Yes to enable location by skill based routing, which routes to support representatives with matching skills at a certain support representative location. You can use location by skill based routing with:

- mySupport-submitted changes. The location selected by the mySupport customer takes precedence, then the support representative location associated with the customer's primary group, then the location associated with the company's primary group. If none are found, the default location (specified in the mySupport Portals Configuration screen) is used.
- Email-submitted changes. The customer's profile will be searched for a primary group and associated support representative location. If there is no associated location, the customer's company record is searched for a primary group and associated location. If none are found, the location in the Default Location field on the Email Processing Basics tab will be used.

Once a location is determined, all support representatives in that location will be searched for matching skills.

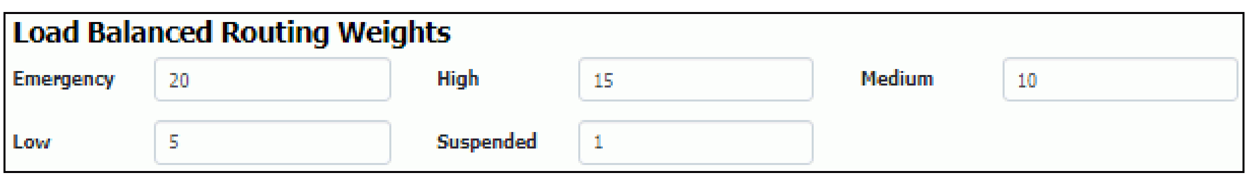
Location By Skill Based Routing Method - This field appears if using location by skill based routing. Select:

- Standard - allows the support representative to select a location and the level of categorization that exactly matches the categorization for which support representative skills should be searched.
- Load Balancing - routes changes based on current open change statistics, including weights based on change priority. The support representative in the selected location and category level with matching skills and the lightest workload is selected.
- Round Robin - allows the support representative to select a location and the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representatives in the selected location with matching skills are considered; the support representative who was assigned a change using the round robin method on the oldest date and time is selected.

Skill-based routing levels (for example, Novice, Advanced, Intermediate, and Expert) are entered on the Incident Management | Routing tab in the Feature Basics screen.

Load Balanced Routing Weights

Load balanced routing involves weights based on change priority. As discussed in the following example, a support representative's workload is calculated by multiplying the number of changes at a certain priority level by the weight assigned to that priority level.



For example, one support representative has two changes at emergency priority. A second support representative may have one change at medium priority and two at low priority. If the emergency change weight is 20, the medium change weight is 10 and low change weight is 5, the support representative's workloads will be calculated as follows:

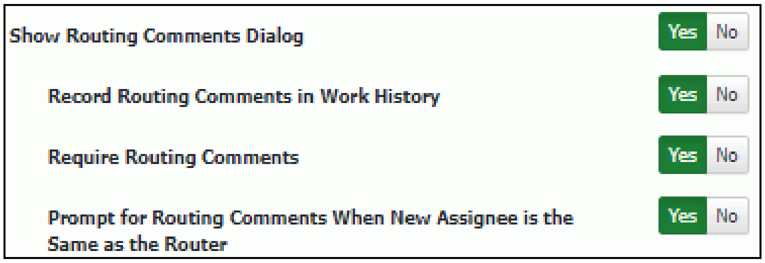
- First support representative = Two changes at emergency priority (2 X 20 = 40).
- Second support representative = One change at medium priority and two at low priority (1 X 10) + (2 X 5) = 20.

Even though the second support representative has three changes and the first has two, the second support representative's workload is less.

Use the fields in the Load Balanced Routing Weights section to enter weights for priority levels and changes with a suspended status. To weight all changes the same regardless of their priority, enter a value of 1 for all five change weight fields.

Routing Comment Options

The Routing Comment dialog can be configured to appear in the Change screen for the support representative to enter a note to be included in the notification email sent to the new assignee. (The note will be on the first line of the email.)



Show Routing Comments Dialog - Select Yes to display the Routing Comments dialog when a change is routed.

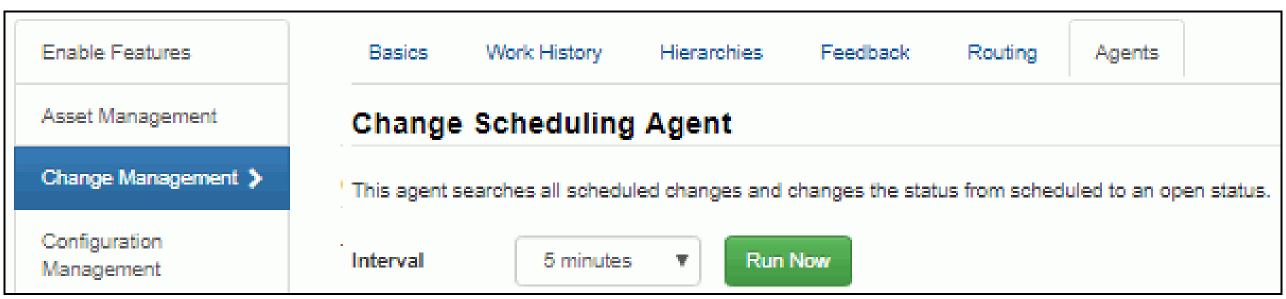
Record Routing Comments in Work History - Select Yes to, when a routing comment is entered, automatically include the comment in the Work History field.

Require Routing Comments - Select Yes to require a support representative to enter routing comments after routing a change.

Prompt for Routing Comments When New Assignee is the Same as the Router - Select Yes to display the prompt for routing comments if the new assignee is the same as the representative initiating the route. The Route Comment prompt will not appear if no notifications are enabled for the routing event.

Enabling the Change Scheduling Agent

Use the **Change Scheduling Agent Interval** field on the Agents tab to select the number of minutes in the interval for the Change Scheduling agent to check all scheduled changes for start dates/times and, if the specified date/time is reached, changes the status from Scheduled to an open status. Change generation times are also checked and change requests are created if the specified time is reached. You can click the Run Now button to execute an agent immediately.

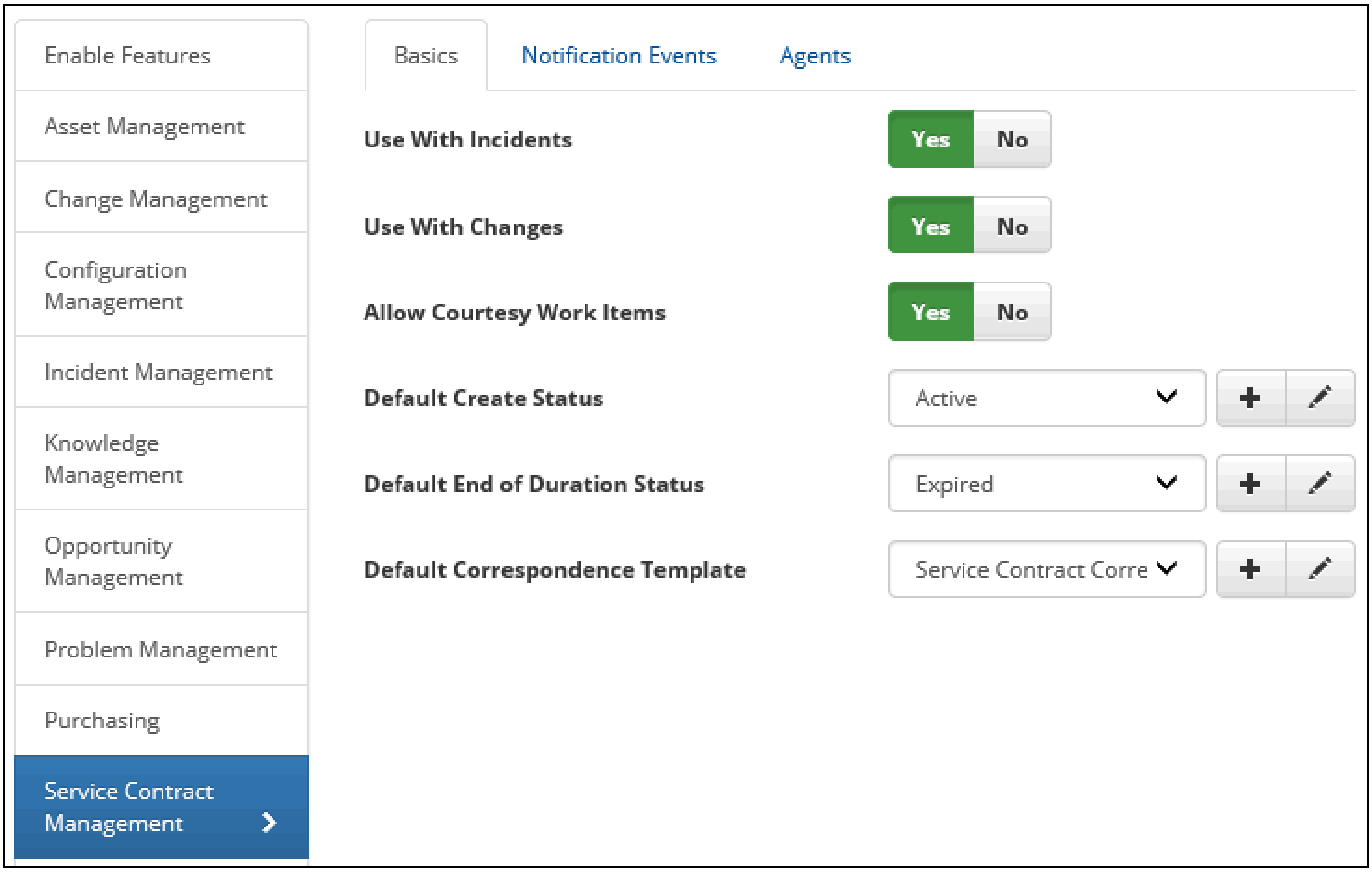


Setting Service Contract Feature Basics Options

The Service Contract Basics screen enables you to enable use of service contracts with incidents and changes, courtesy work items, Service Contract entry screen defaults, and notifications.

Completing the Basics Tab

Use the Basics tab to enable use of service contracts with incidents and changes, courtesy work items, and Service Contract entry screen defaults.



Use With Incidents - Select Yes to enable Service Contract functionality in the Incident entry screen.

Use With Changes - Select Yes to enable Service Contract functionality in the Change entry screen.

Allow Courtesy Work Items - A courtesy work item is an incident or change that does not count against the service contract in effect for a customer, company, or asset; it is created for an incident or change if the Mark This a Courtesy Work Item checkbox is enabled in the Select Service Contract dialog that appears after a customer is selected.

Select Yes to include the Mark This a Courtesy Work Item checkbox in the dialog that appears for selecting a service contract in the Incident and/or Change screens.

Default Create Status - Select the status level to display by default when a service contract is created. Use the Create New and View/Edit options to access the Custom Status Labels screen; see “Defining Custom Status Labels” on page 21 for more information.

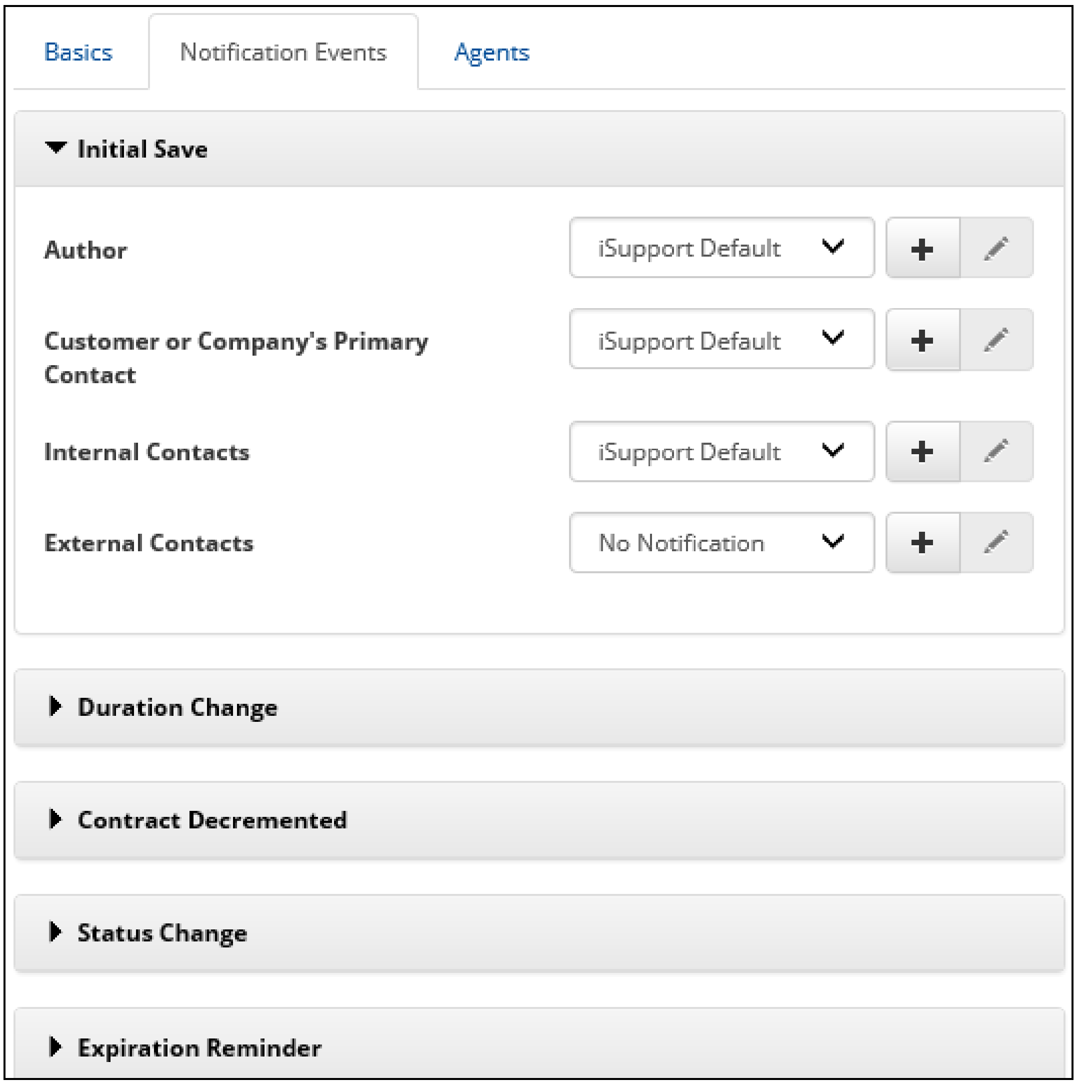
Default End of Duration Status - Select the Expired status level to assign to the contract by default when the date in the Duration End field is reached. Use the Create New and View/Edit options to access the Custom Status Labels screen; see “Defining Custom Status Labels” on page 21 for more information.

Default Correspondence Template - Select the correspondence template that will apply by default when a support representative initiates a correspondence via the Service Contract entry screen. Correspondence templates that are active and enabled for the Service Contract module will be available for this feature. Use the Create New and View/Edit options to access the Correspondence Template screen.

Setting Up Notifications for Service Contract Events

You can configure notifications to be sent when service contract events occur such as record creation, a change to the duration of the contract, an incident or change is counted against the contract, a support representative makes a change in the Status field, or an expiration reminder is sent.

The notifications on this screen are used as defaults for the Notification Event field in the Service Contract entry screen. Use the fields below to enable specified notifications to be sent to specified recipients for Service Contract events. You can select the default notification or a predefined custom notification; use the Create New and View/Edit options to access the Custom Notifications screen. Note that these settings will be used if nothing is selected in the Notification Event section in the Service Contract entry screen and no template is selected. Notifications are sent according to the schedule of the Service Contract agent; see “Enabling the Service Contract Agent” on page 18.



Initial Save - Select the recipients and notifications to be sent when a service contract is initially saved.

Duration Change - Select the recipients and notifications to be sent when an entry is changed in the Duration fields for a service contract and the record is saved.

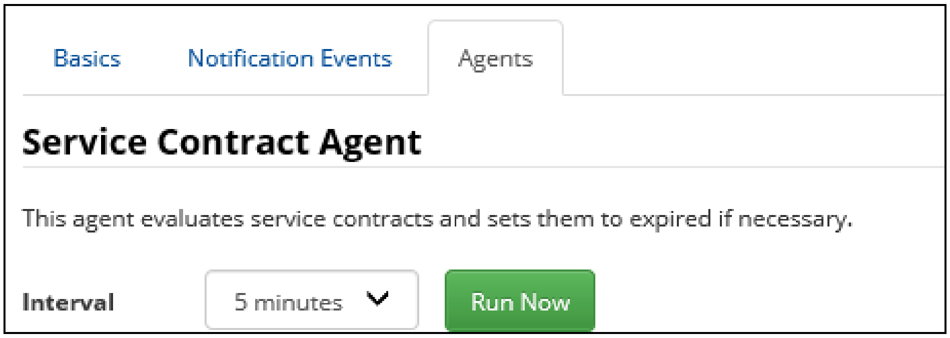
Contract Decremented - Select the recipients and notifications to be sent when an incident or change is counted against a service contract.

Status Change - Select the recipients and notifications to be sent when an entry is made in the Status field for a service contract and the record is saved.

Expiration Reminder - Select the recipients and notifications to be sent when a contract is about to expire.

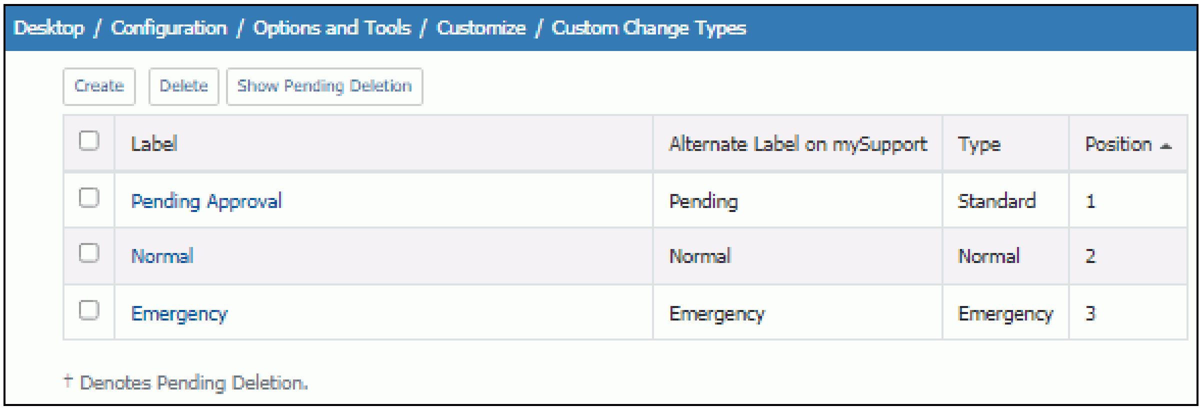
Enabling the Service Contract Agent

In the Service Contract Agent Interval field, select the number of minutes in the interval for the Service Contract agent to check all service contracts for counts and/or end dates/times; if the specified total count and/or end date/time is reached, the status changes to an Expired status. You can select Daily to run the agent every day at a specified start time.



Setting Up Custom Change Types

Use the Options and Tools | Customize | Custom Change Types screen to create different labels for the Standard, Normal, and Emergency change types.

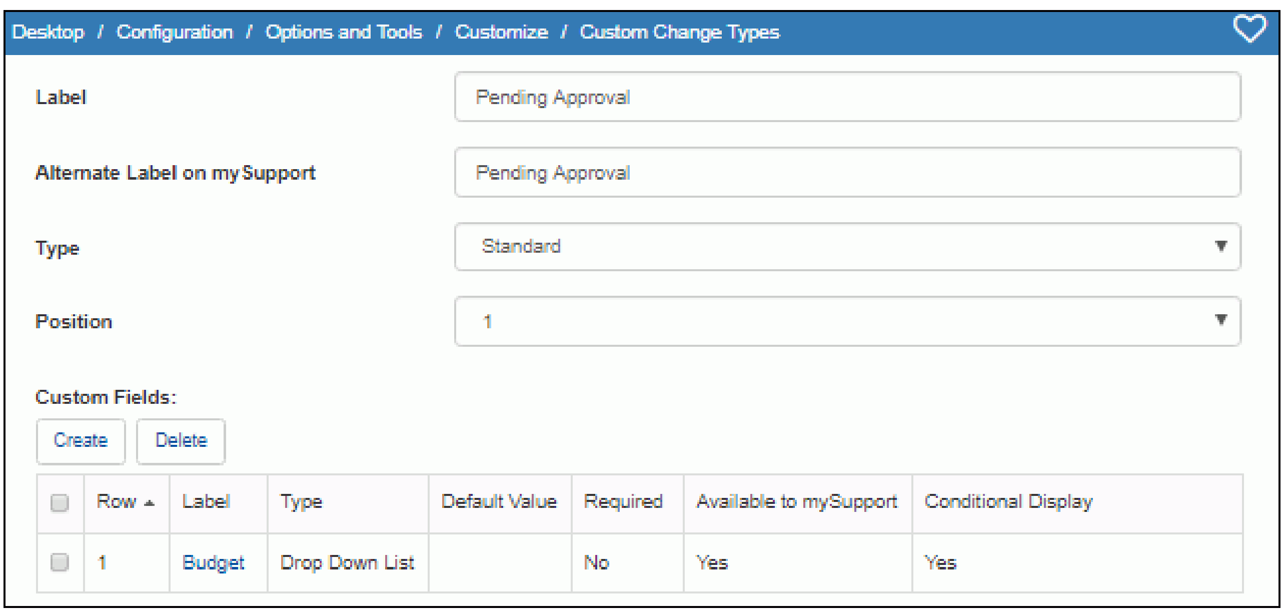


You can use the Show Pending Deletion link to display records that have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes these records. When the Show Pending Deletion link is selected, records that are pending deletion will display with a cross symbol.

According to ITIL, change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.
- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

To define a custom change type, click the Create button.



Label - Enter the name for the type to appear as a selection in the Change screen and in views on the Desktop.

Alternate Label on mySupport - Enter the change type label to appear on the mySupport portal.

Type - Select the basis for the custom type label: Standard, Normal, or Emergency.

Position - Enter the number for the position of the status in the Type field in the Change screen. Position one will be listed first, position two will be listed second, and so on.

Custom Fields - Click the Create button in the Custom Fields section to enter a field to display when the custom change type is selected in the Incident, Problem, or Change (if enabled) screen. See "Configuring Custom Fields" on page 23 for more information.

Defining Custom Status Labels

Use the Options and Tools | Customize | Custom Status Labels screen to create custom labels for iSupport's work item status levels. These labels will be included in views and reports, and will appear for selection in work item screens; however, you can restrict access via the Template and Support Representative Group configuration screens. Use the **Order of Precedence** link in the Custom Status Labels screen to set which will prevail if both a template and a support representative group have a restricted status.

You can also create labels that will appear to customers using mySupport.

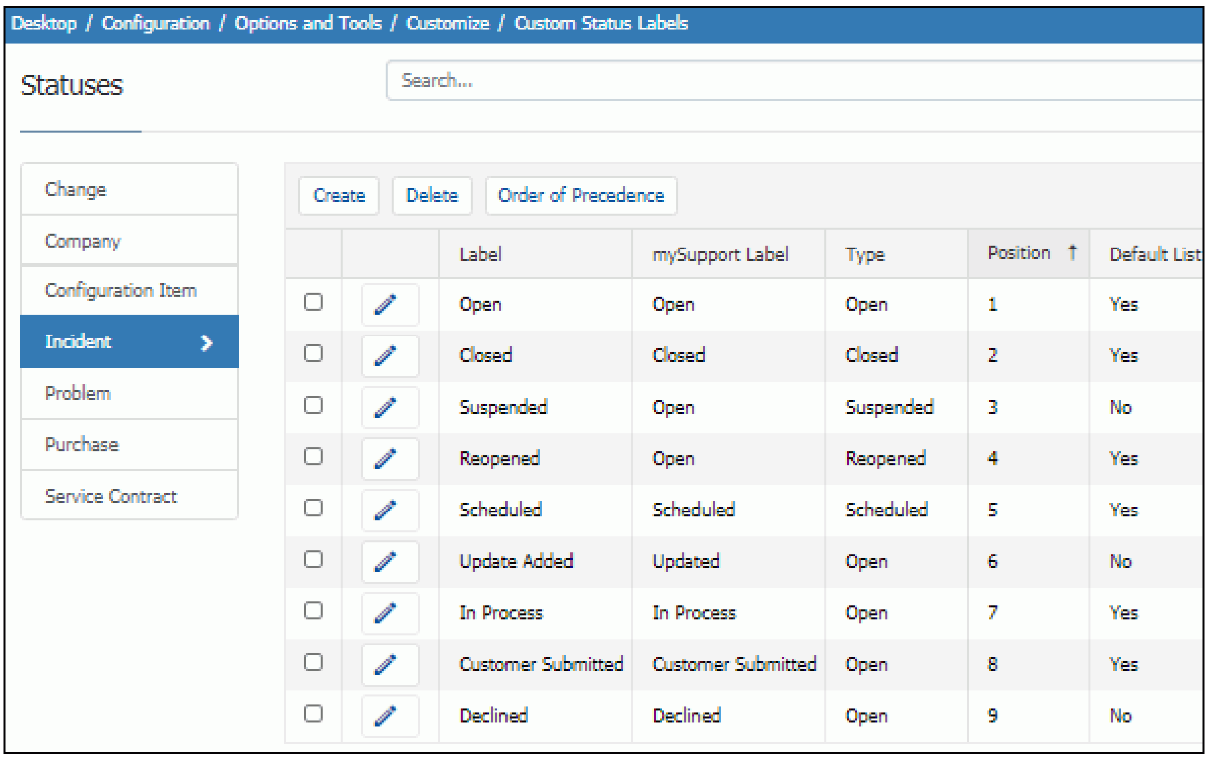
If you have the Incident Management Edition, you can define labels for the following work item types:

- Incident: Open, Closed, Suspended, Scheduled, Reopened
- Service Contract: Active, Inactive, Suspended, and Expired.

If you have the Service Desk Edition, you can define labels for the following of work item types:

- Change: Open, Closed, Suspended
- Problem: Open, Closed
- Purchasing: Open, Closed

Note: For all except Company and Configuration Item, there must be at least one status label of each type. For incidents, there must be only one Reopened and Scheduled type.



Label	mySupport Label	Type	Position	Default List
Open	Open	Open	1	Yes
Closed	Closed	Closed	2	Yes
Suspended	Open	Suspended	3	No
Reopened	Open	Reopened	4	Yes
Scheduled	Scheduled	Scheduled	5	Yes
Update Added	Updated	Open	6	No
In Process	In Process	Open	7	Yes
Customer Submitted	Customer Submitted	Open	8	Yes
Declined	Declined	Open	9	No

Label - Enter the name for the status.

mySupport Label - Enter the status label to appear on the mySupport portal. Enable the status label via the <*work item type*> Display tab in the Core Settings | mySupport | Portals | Options configuration screen.

Type - Select the basis for the custom status label: Open, Suspended, Reopened, or Closed. Note: Since there can only be one Reopened status label, it will not be available for new status labels.

Position - Select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)

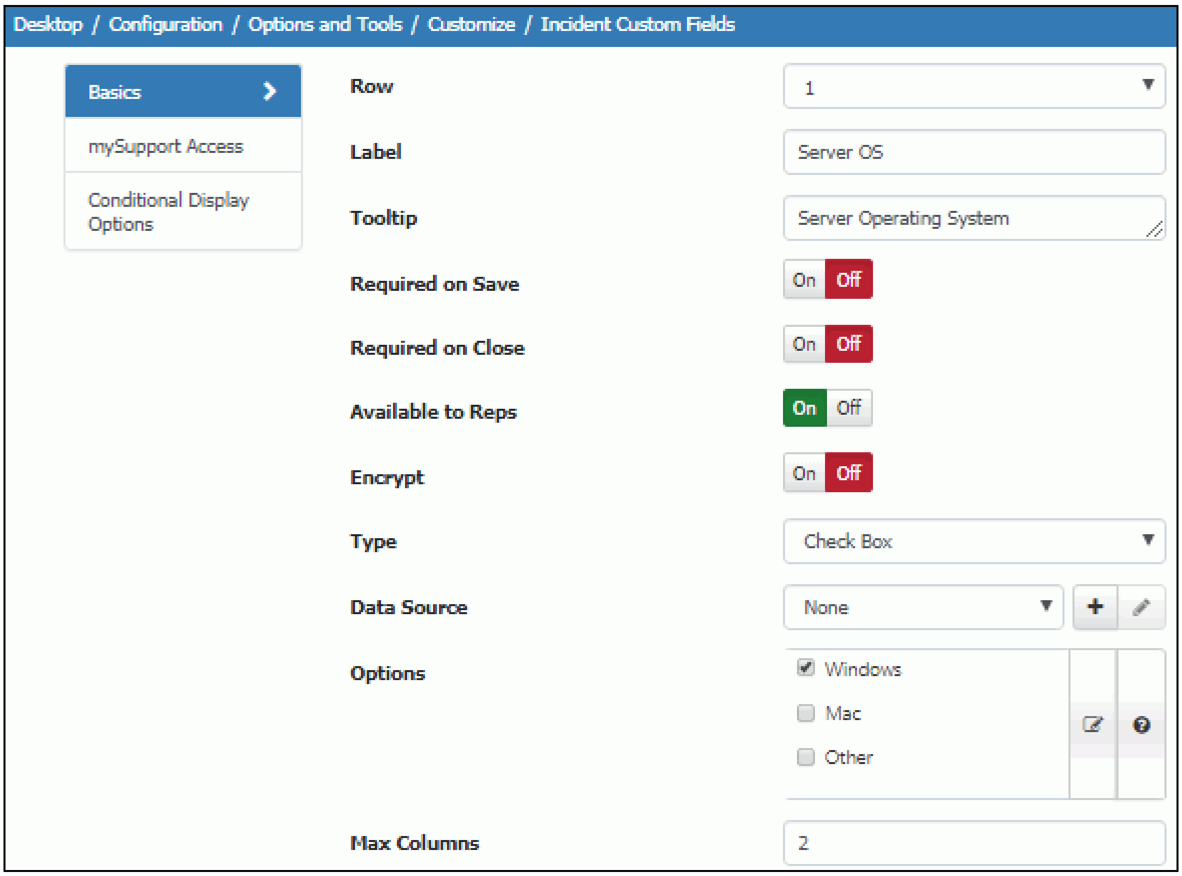
Default List (incidents/changes) - Enable to include the status as an available option in the default list that will appear in the Status field when a support representative creates a new incident or change. If not enabled, the status will only display if configured for a template that has been applied, set as the default status (on Incident or Change Basics for an email account or mySupport Portal Options), or a rule configured with the Change Status Label action is met. Note that status label display can also be controlled via the Restrict Statuses/Statuses to Display fields on the

Advanced tab in the Incident and Change Templates screen and on the Work Item UI tab in the Rep Group configuration screen (applies only to each support representative's primary group).

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.

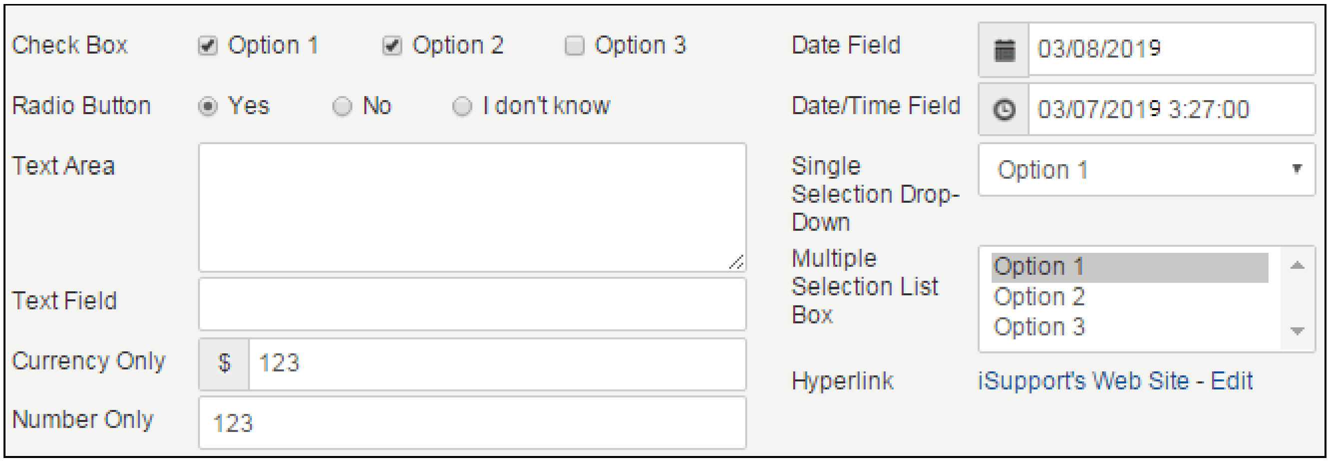
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see "Pulling From a Data Source" on page 28 for more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

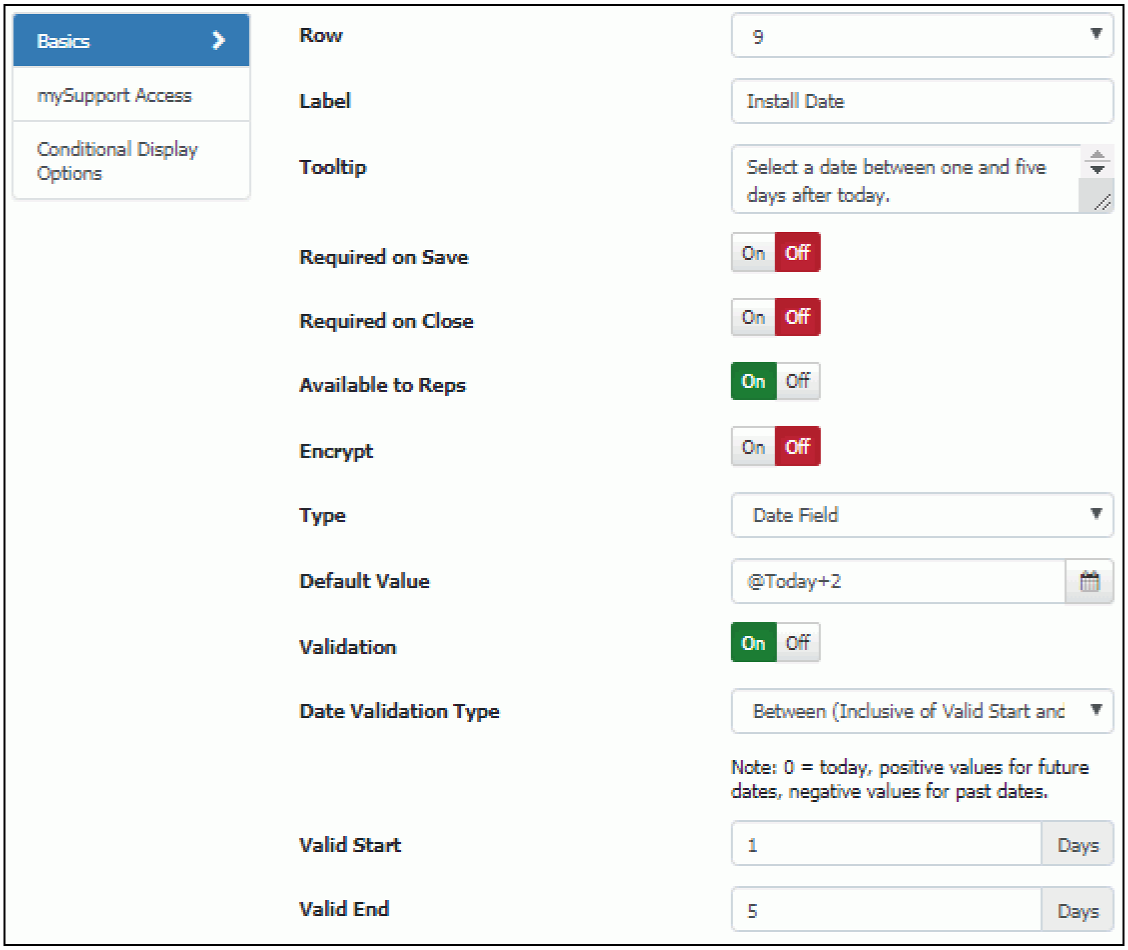
Default Value - Enter a value to appear as an option in the custom field by default.

- 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.)

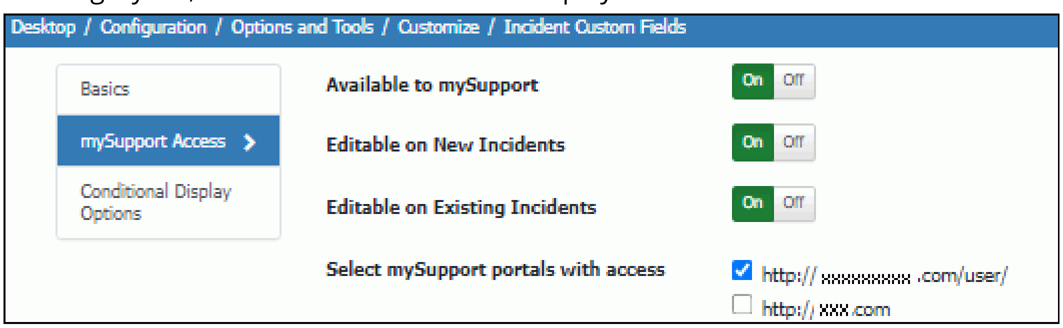
mySupport Access Options

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.

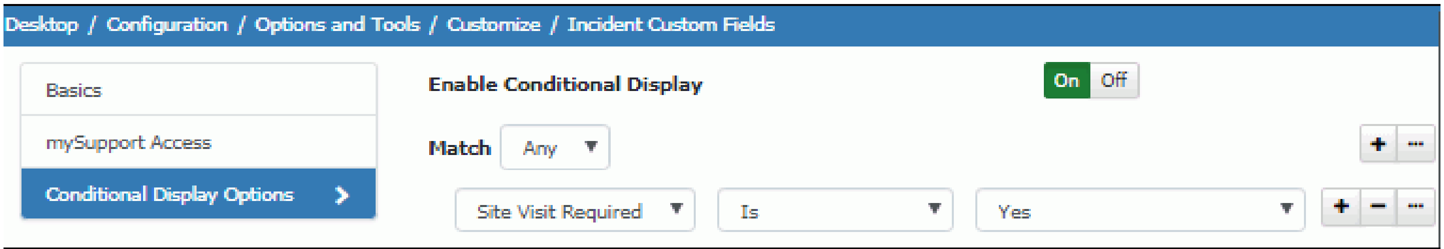


Setting Advanced Options

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

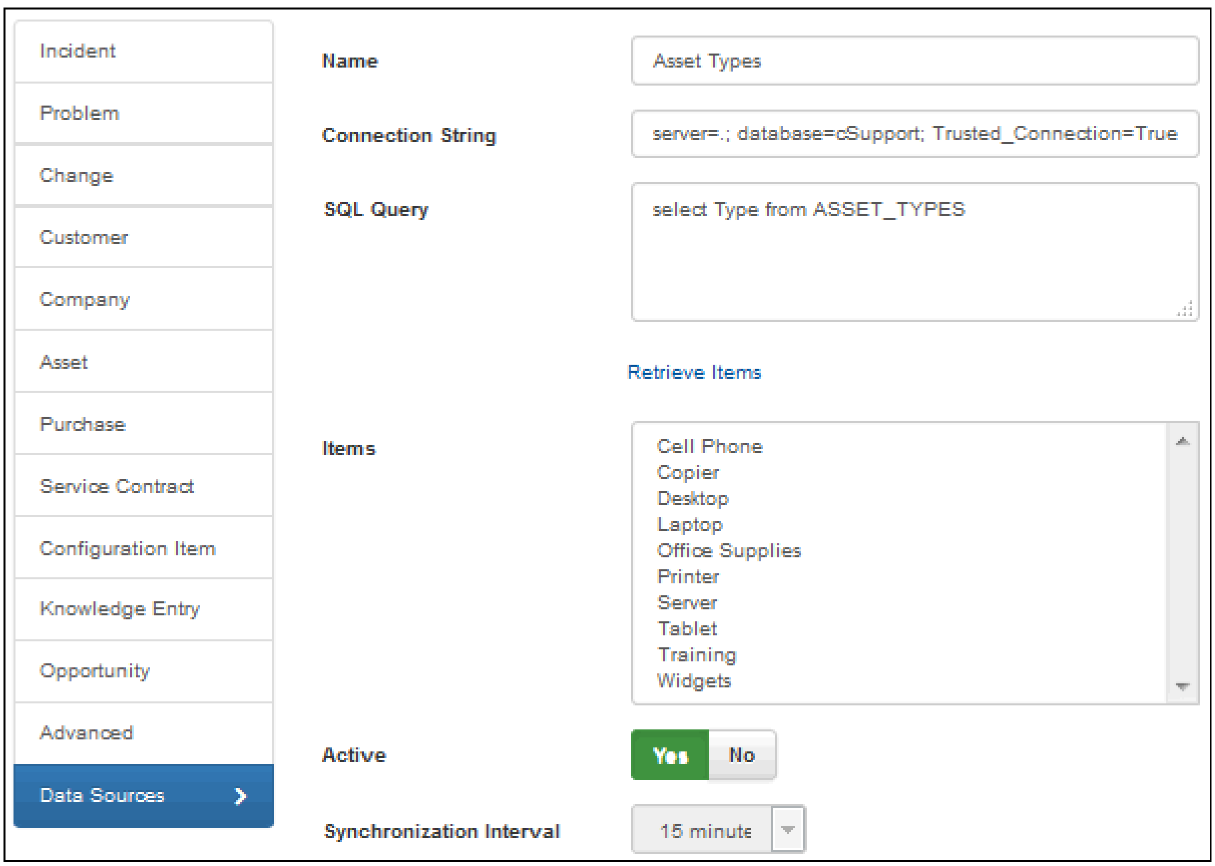
Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.



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.

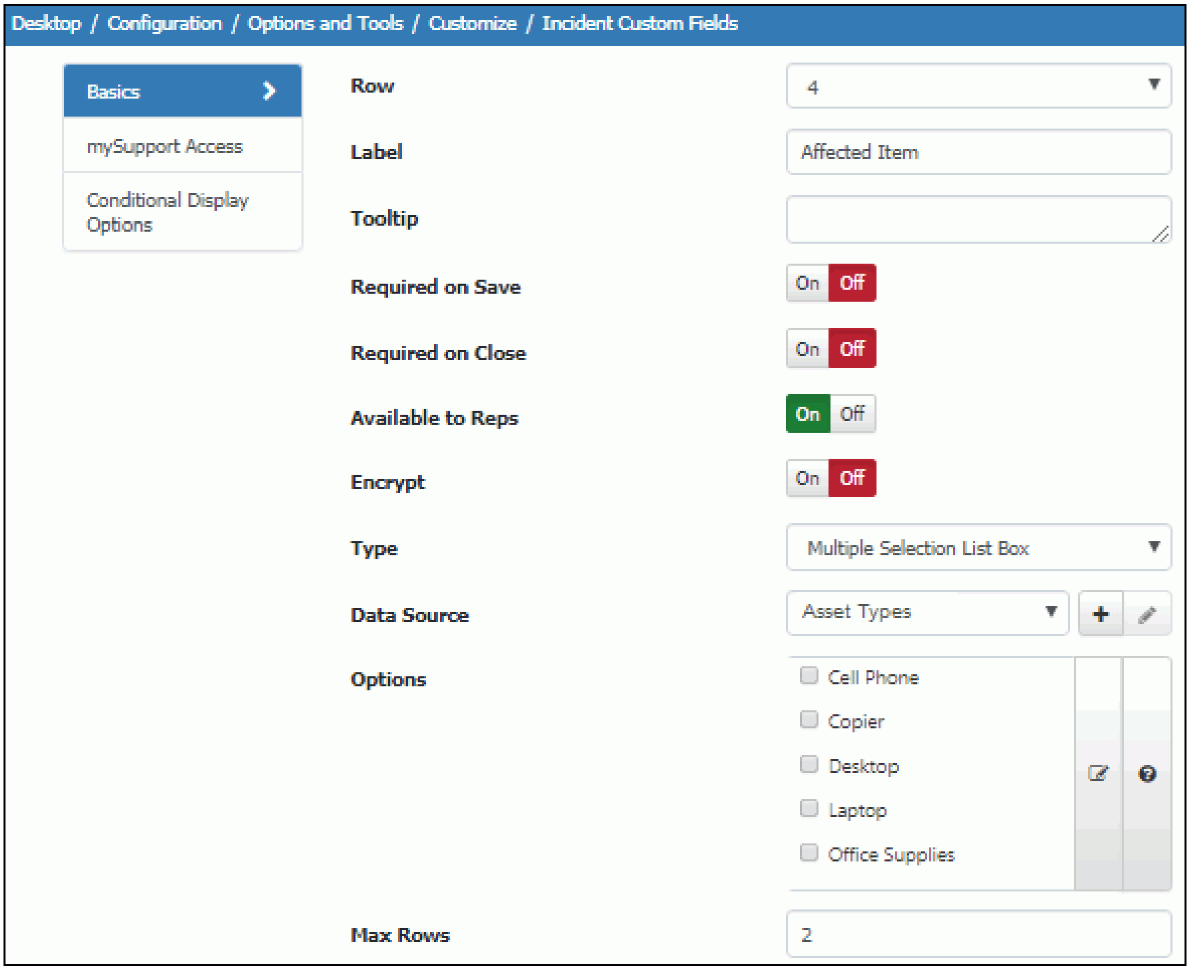
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Select the Retrieve Items button to populate the Items field using this string.

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.



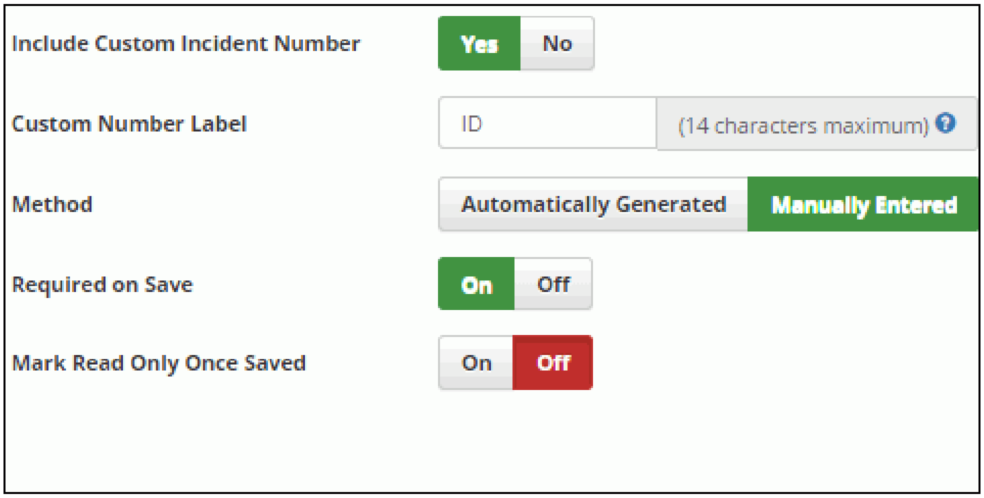
Defining Custom Numbers

You can include a field on the Incident, Problem, Change, Service Contract, and Purchase Request screens for entering a custom number, or an automatically generated number consisting of a prefix, suffix, and sequence that you configure. The number can be up to 15 characters.

The Custom Number configuration fields appear after selecting Yes in the Include Custom <record type> Number field. There are two methods for configuring custom numbers: a manually entered option or an automatically generated option.

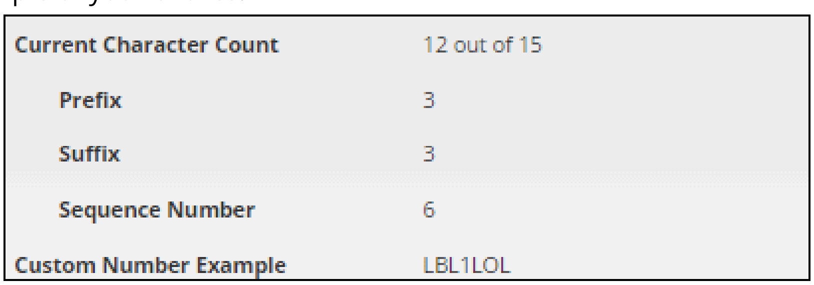
Configuring a Manually Entered Number

The Manually Entered option displays a field for entering a custom number. Select Yes in the Required on Save field to require entry in this field before the work item can be saved. Select Yes in the Mark Read Only Once Saved field to prohibit entry in the field after the work item is saved.



Configuring an Automatically Generated Number

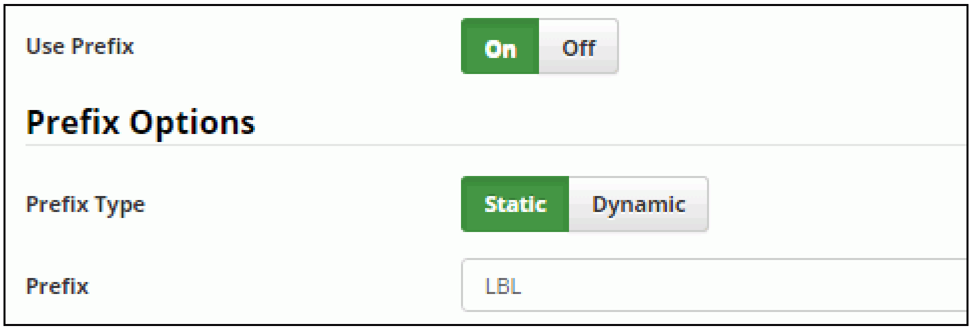
The Automatically Generated option creates numbers automatically based on prefix, suffix, and sequence settings that you configure. You can either use a static (fixed) custom prefix and suffix, restricted via a start and end number if desired. Prefixes and suffixes can be static (fixed) or dynamic; however, if you have a dynamic prefix you must have a static suffix. The number cannot exceed 15 characters; the box above the Use Prefix field contains a current character count and example of your entries.



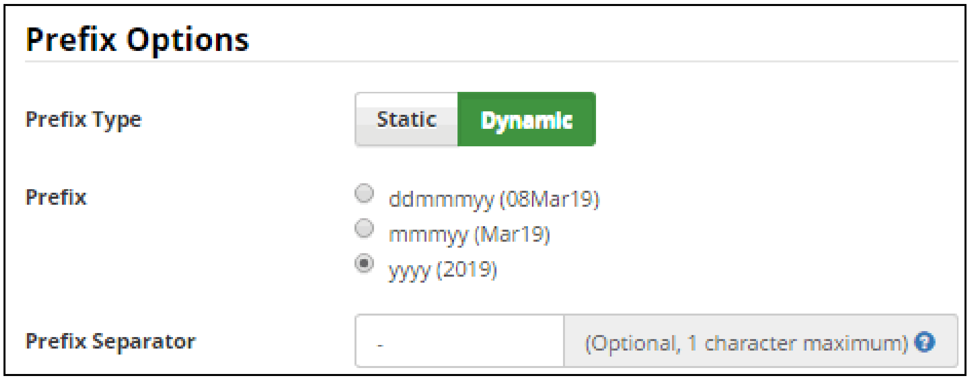
Configuring the Prefix

In the Prefix Options section, select the Use Prefix checkbox to configure characters that will precede the custom number. Then select the prefix type: static (fixed) or dynamic (a day, month, and/or year combination).

- If using a Static prefix type, enter the characters (letters, numbers, or symbols) in the Prefix field.



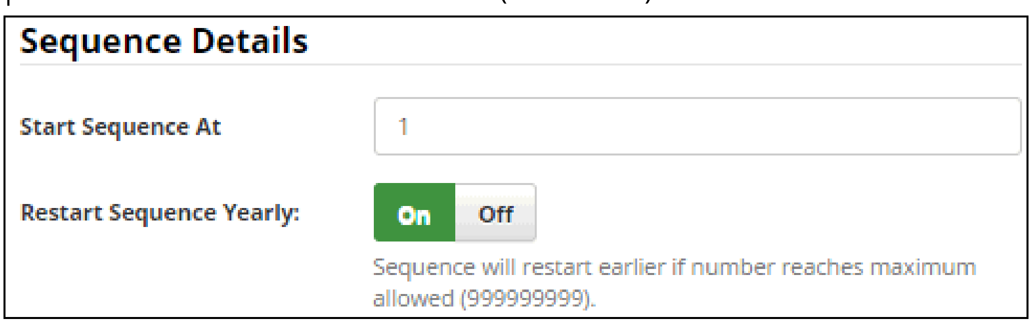
- If using a Dynamic prefix type, select the day, month, and year combination in the Prefix field. You can optionally enter a character (such as a hyphen) in the Prefix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



<u>Configuring the Sequence</u>

Use the fields in the Sequence Details section, to configure the sequence number between any configured prefix and any configured suffix.

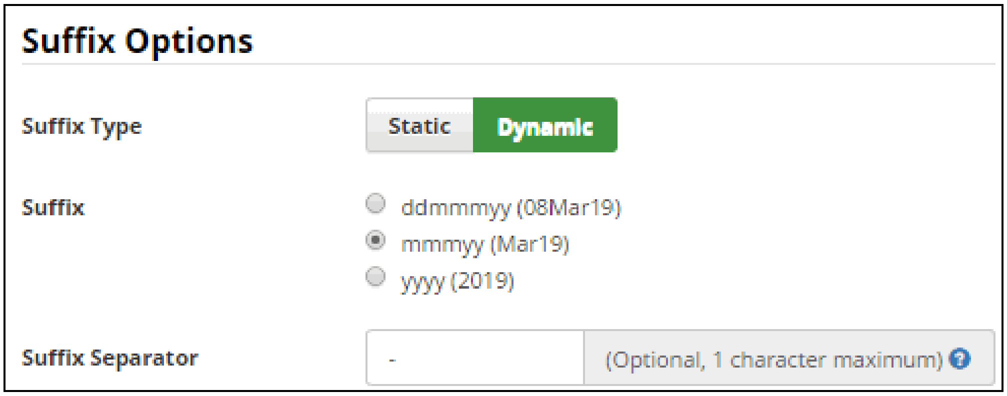
- Enter the number to start the sequence in the Start Sequence At field.
- Your selection in the Prefix field will determine the Restart Sequence field. If you select yyyy and you wish to restart the sequence when the first work item is created after 12:00pm on December 31, select Yes in the Restart Sequence Yearly field.
- If you wish to restart the sequence after the sequence number reaches a specified maximum (for example, after the sequence number reaches 1000), enter the maximum number in the Restart Sequence After field. If not specified, sequence will restart at maximum allowed (999999999).



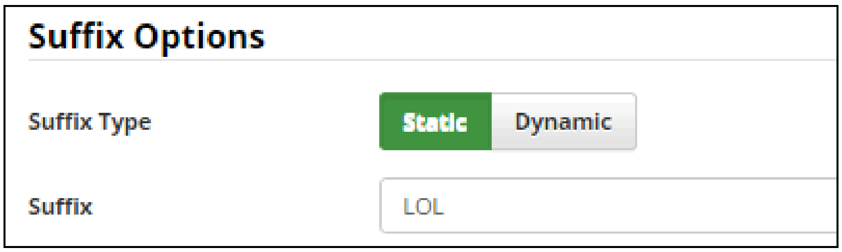
<u>Configuring the Suffix</u>

Select On in the Use Suffix field to configure characters that will be placed after the custom number. If using a Dynamic prefix type, you'll need to use a static suffix.

- If using a Dynamic suffix type, select the day, month, and year combination in the Suffix field. You can optionally enter a character (such as a hyphen) in the Suffix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



- If using a Static suffix type, enter the characters (letters, numbers, or symbols) in the Suffix field.



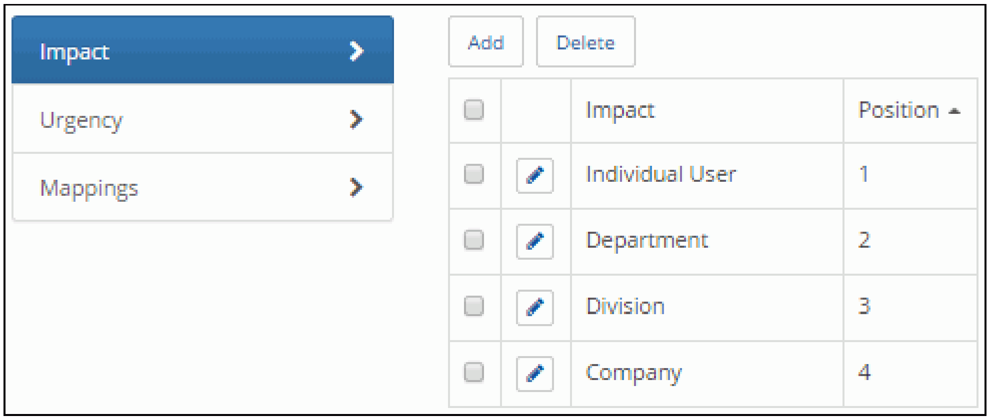
Defining and Mapping Impact and Urgency Values

Impact and urgency functionality is enabled for incidents in the Incident Management Feature Basics screen, and is permanently enabled for Problem and Change Management. Prioritization encompasses urgency (based on the amount of time a resolution is needed) and impact (usually the number of users affected); use the Impact and Urgency configuration screen to define impact and urgency values that map to priority levels. These values are used by Incident, Problem, and Change functionality.

In the Incident, Problem, and Change screens, the defined values will be available in the Impact and Urgency fields for selection. The specified mapped priority will appear as default but all priority levels will available if permissions are configured for the support representative to change the priority.

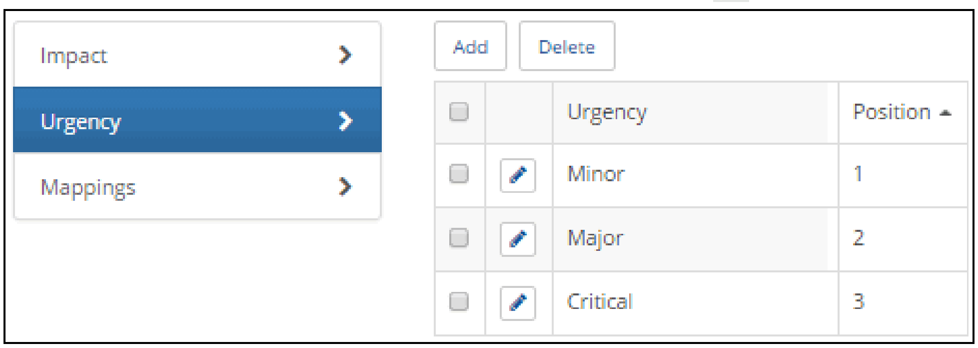
Adding Impact Values

Use the Impact tab to define values for the effect of an Incident, Problem, or Change on business processes. Click the Add link on the Impact tab to add a value; select Edit to make a change.



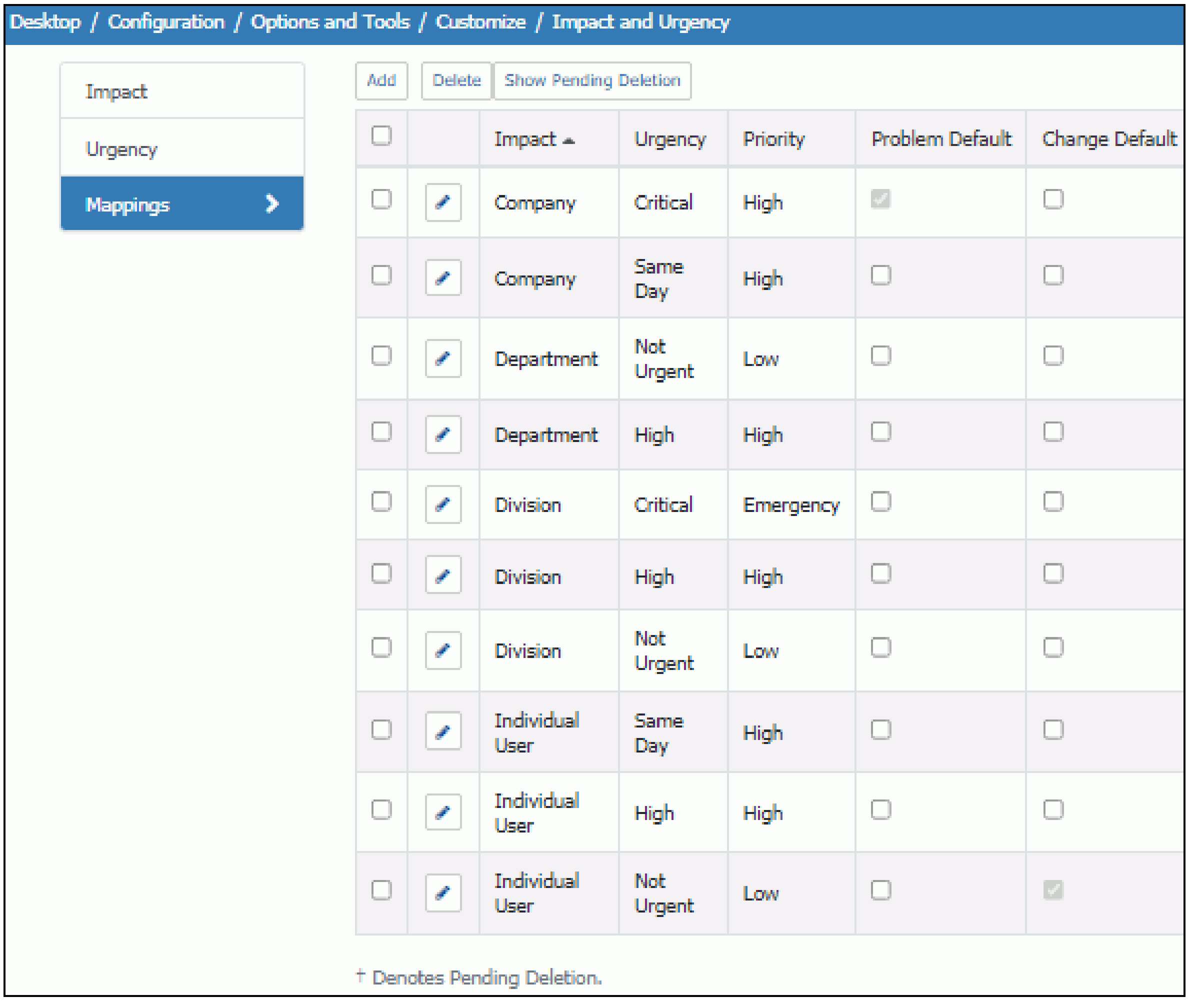
Adding Urgency Values

Use the Urgency tab to define values for the measure of how long it will be until an incident, problem, or change has a significant impact on the business. Click the Add link to add a value; select Edit to make a change.



Defining Mappings

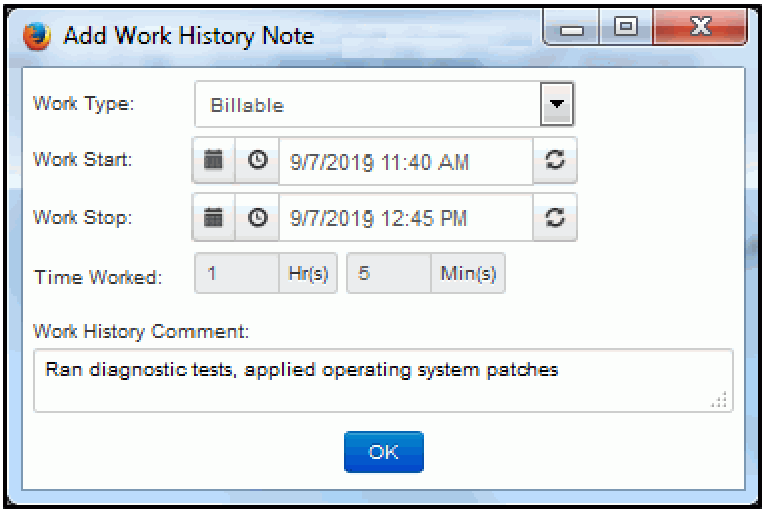
Use the Mappings tab to associate impact, urgency, and priority values and to specify the defaults to appear when the associated values are selected in the Incident, Problem, and Change screens. Click the Add link to add a value; select Edit to make a change.



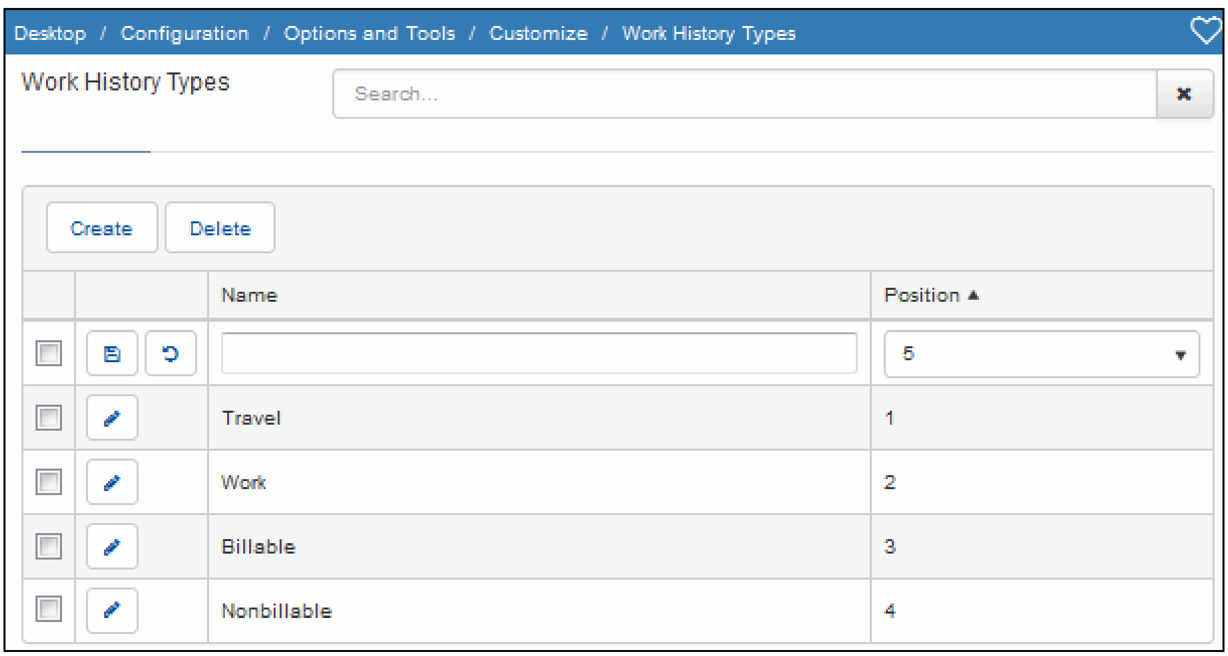
You can use the Show Pending Deletion link to display records that have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes these records. When the Show Pending Deletion link is selected, records that are pending deletion will display with a cross symbol.

Configuring Work History Types

Use the Options and Tools | Customize | Work History Types screen to create custom entries for support representatives to select to describe the work performed on a work item. As shown in the example below, these entries will display as options in the Work Type field in the Work History and Save dialogs in the Incident, Problem, Change, and Purchasing screens. The Work Type field is enabled for incidents, knowledge entries, problems, and changes in the Feature Basics screen.

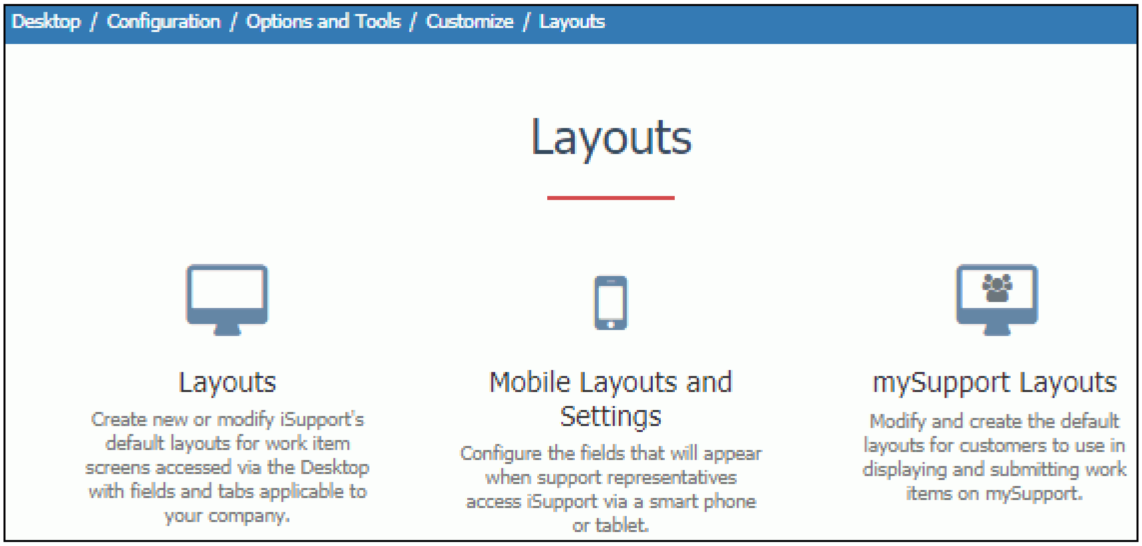


Use the Name field to enter work history types. In the Position field, select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)



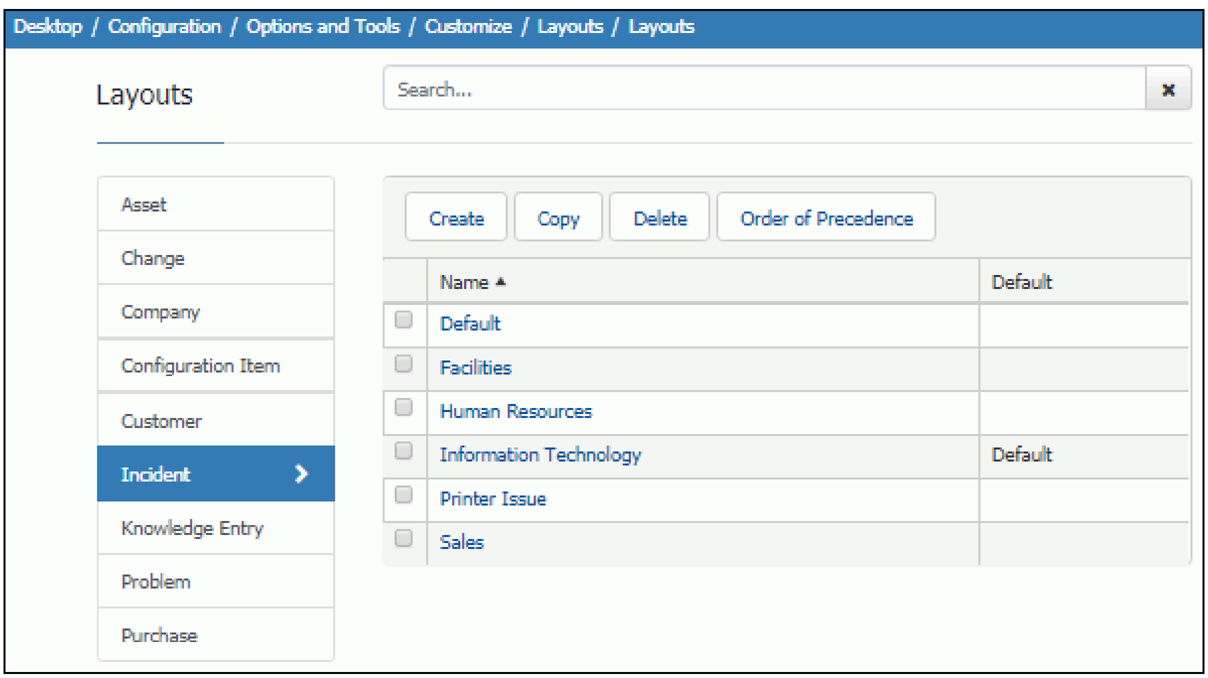
Configuring Screen Layouts

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.



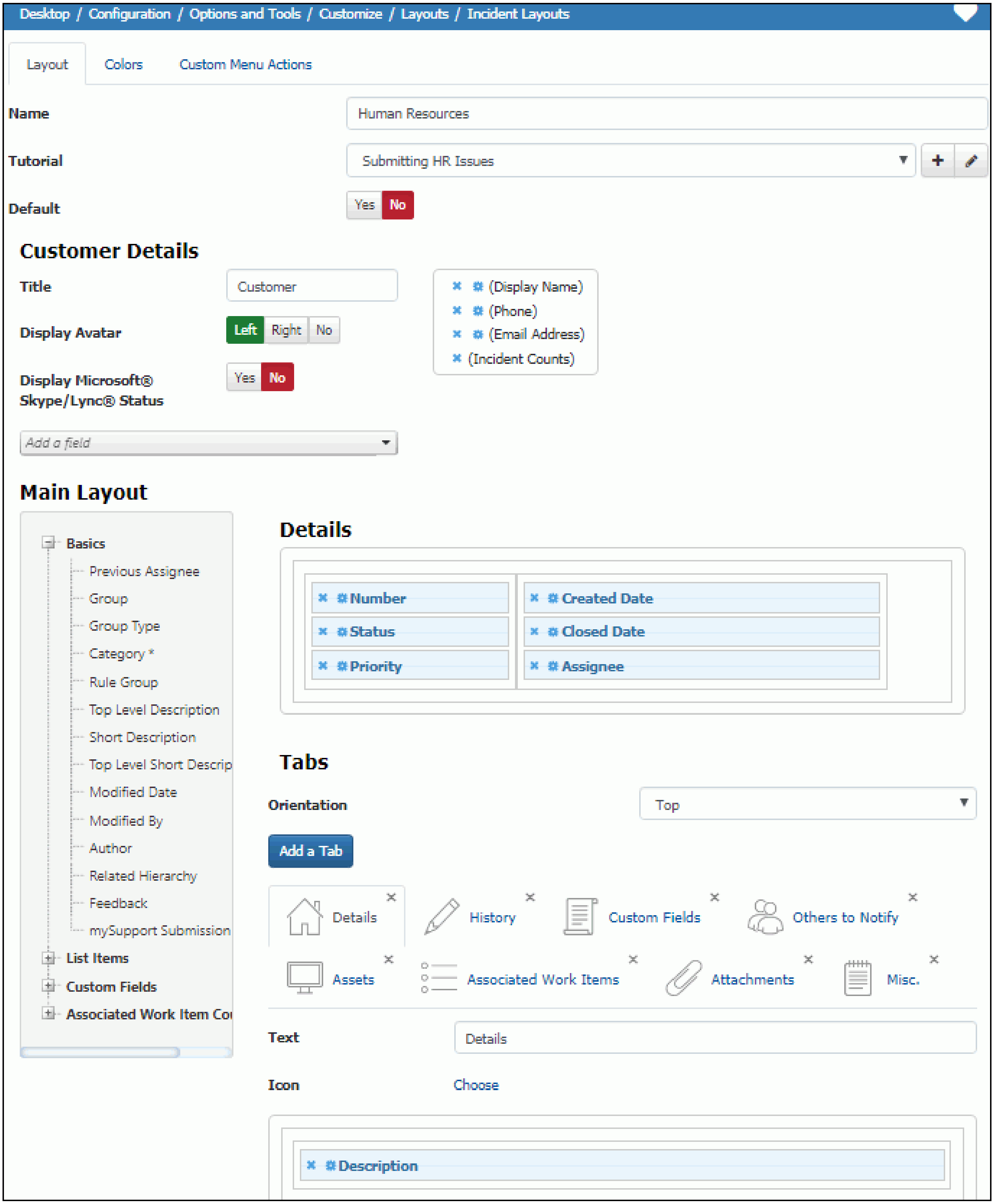
Note that only layouts configured via the Global Settings | Mobile Settings screen will apply to the mobile HTML5 interface. Also, mySupport Customer layouts will appear when the customer selects the View Complete Profile button in the Account Settings screen on a mySupport portal.

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.

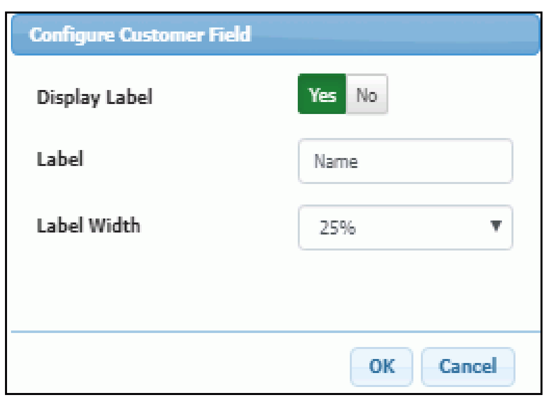
Configuring Customer Details

Rep Incident and Change Screens

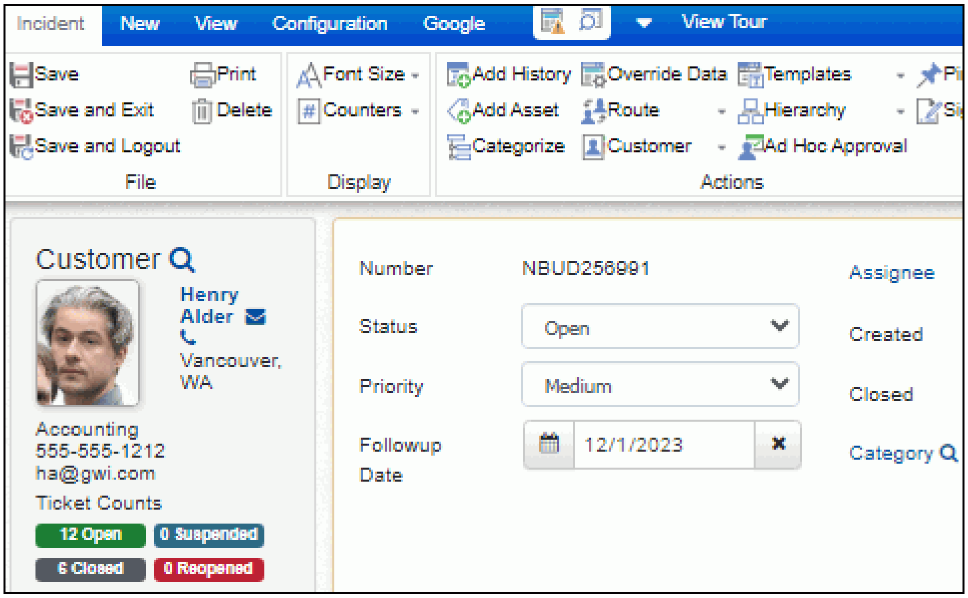
The Customer Details section will appear in the Rep Incident and Change Layout configuration screens as shown below.

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.

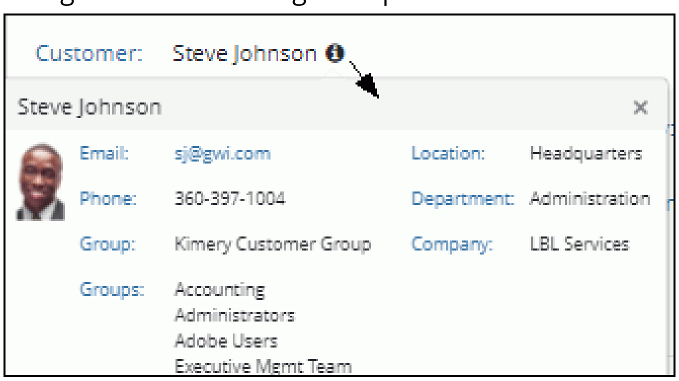


Use the **Display Microsoft® Skype/Lync® Status** field to include an icon that will display the Microsoft Skype/Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Skype/Lync functions. In order for the icon to appear, Microsoft 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:

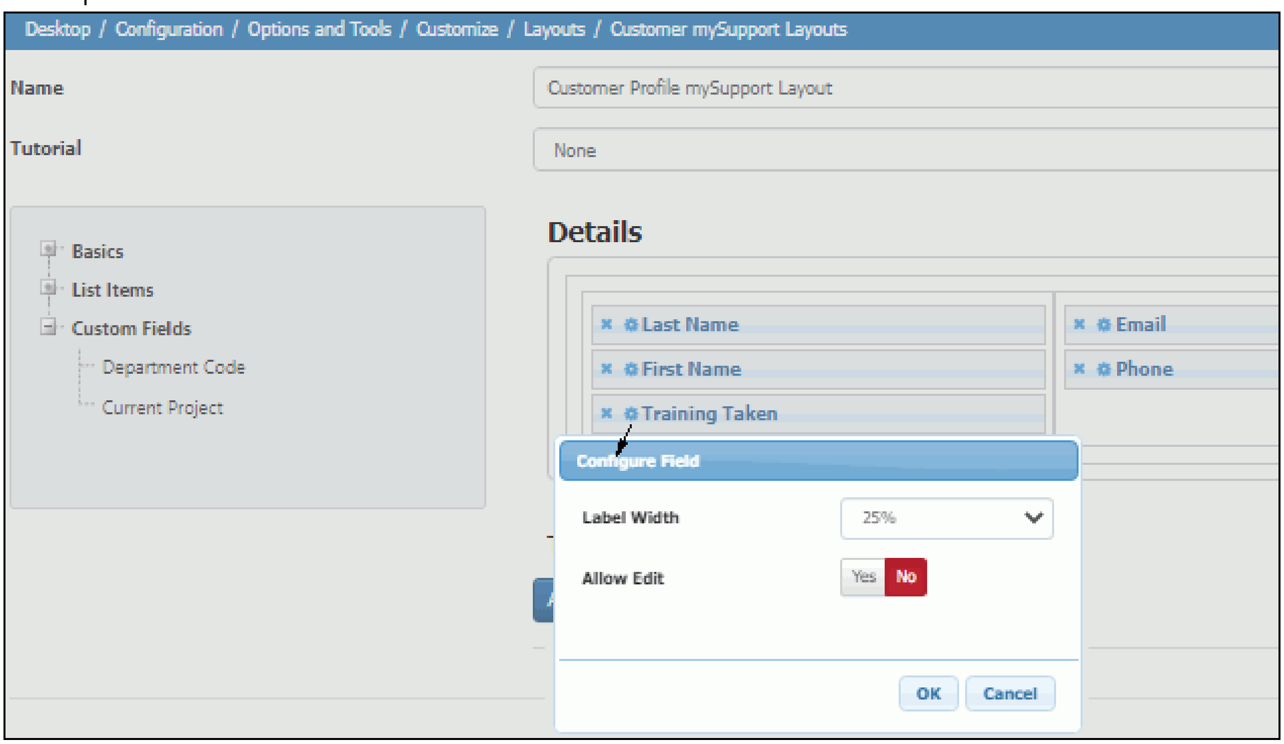


• Individual fields under the Customer Fields section

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.

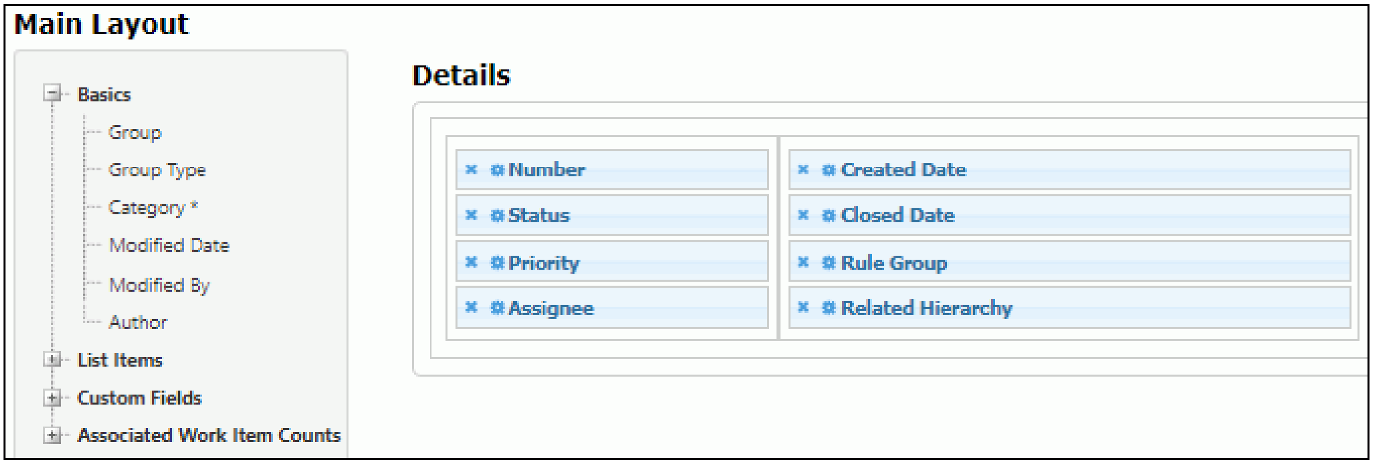
mySupport Customer Profile Custom Field Edit Access

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.

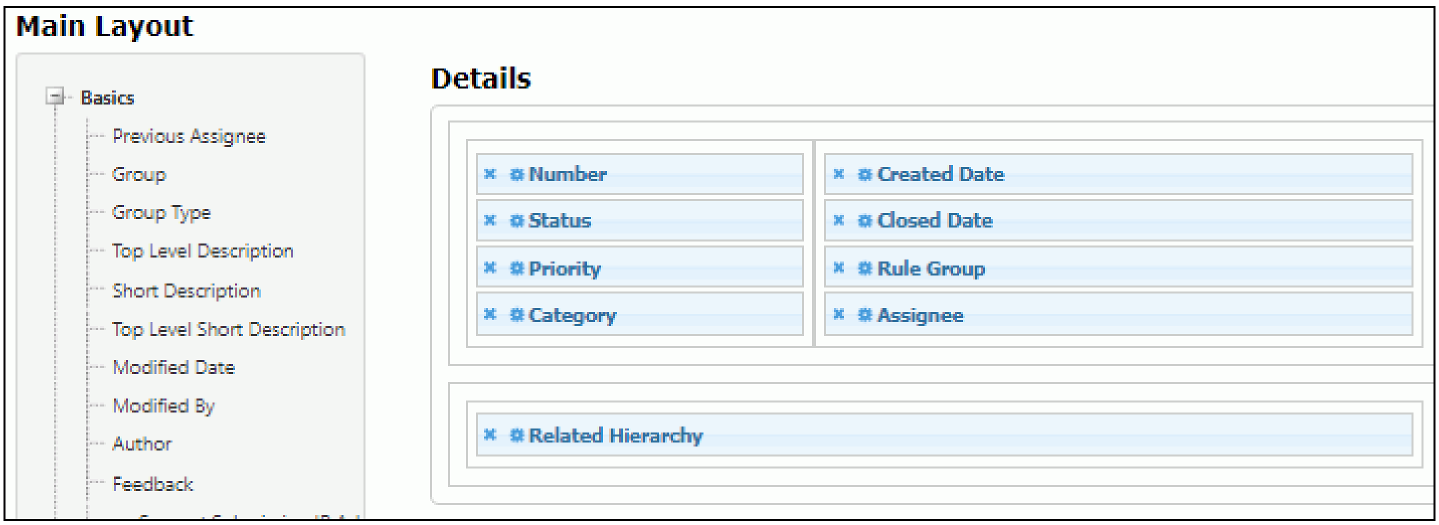


Adding Fields and Tabs

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.

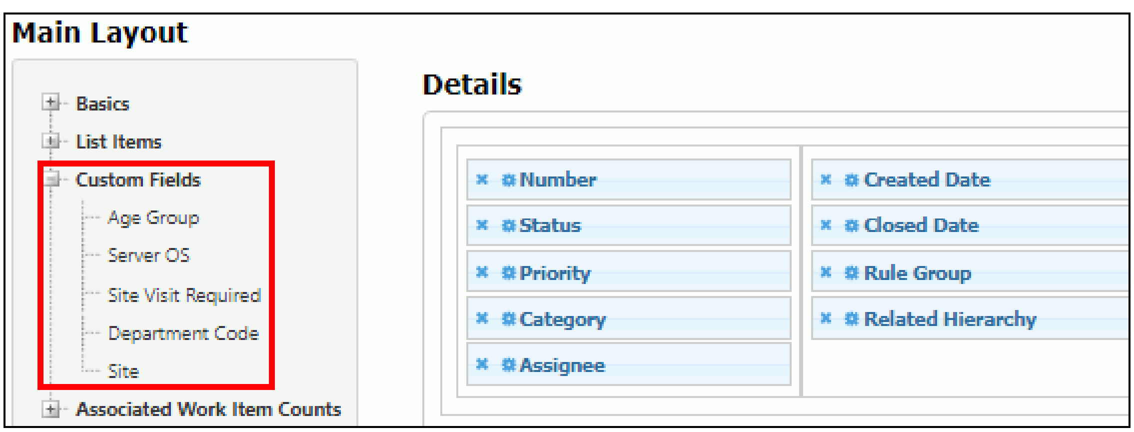


You can drag a field to the lower part of the Details section to create a subsection for a field.

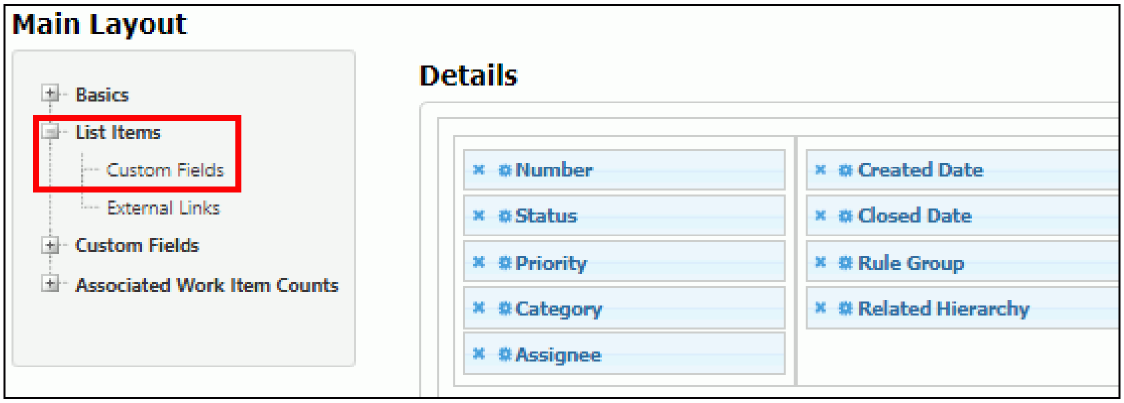


Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, or CI type. To include custom fields on a layout, you can:

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

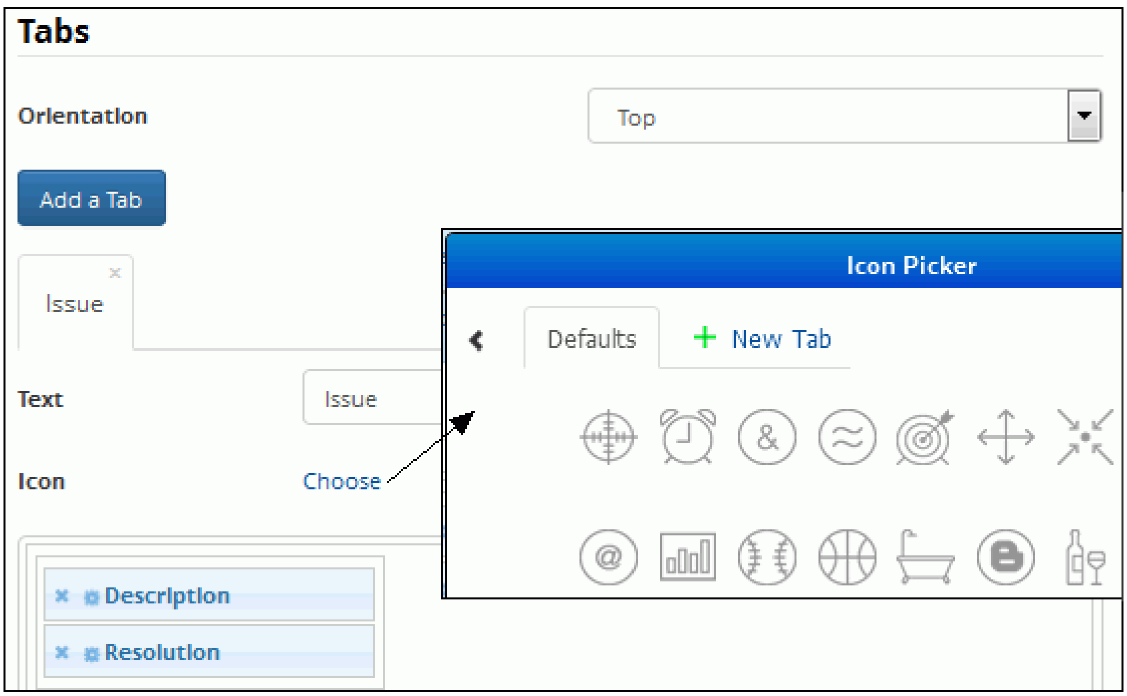


- Drag the Custom Fields field under the List Items section and then select Configure Field to display the Configure Field dialog and select the types of custom fields to include: global custom fields, additionally defined custom fields, or both. See "Configuring Fields" on page 43.

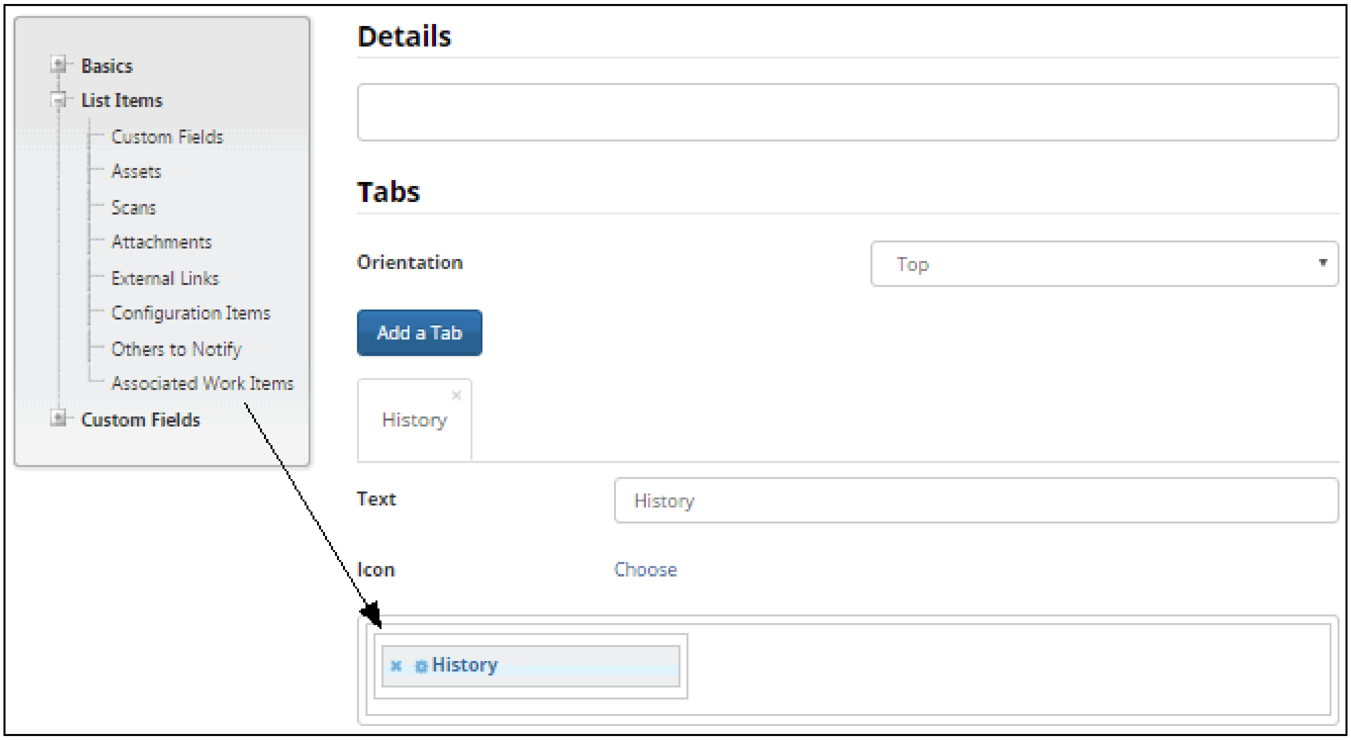


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

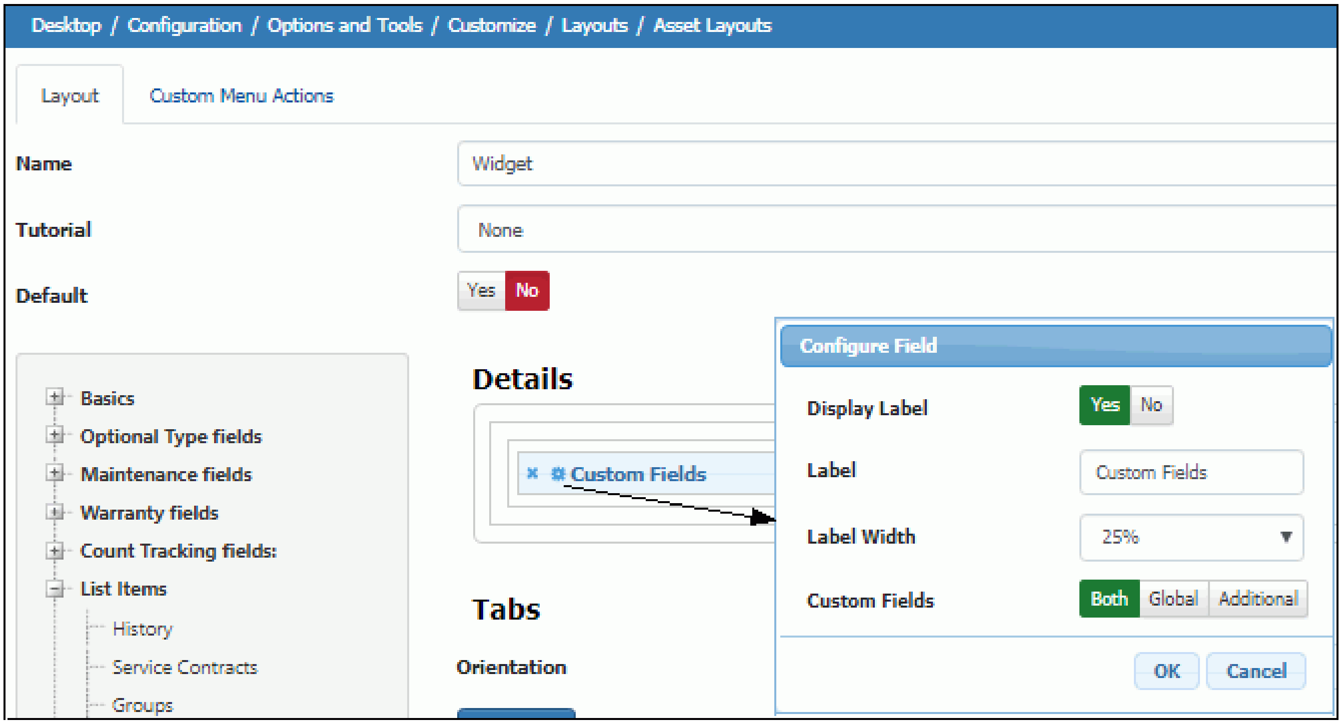


Note: The Description field is optional on mySupport incident submit layouts. The following text will be included in the Description field after submission: "Description field not included in <layout name> mySupport incident submit layout." If the layout is associated with a template, the description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

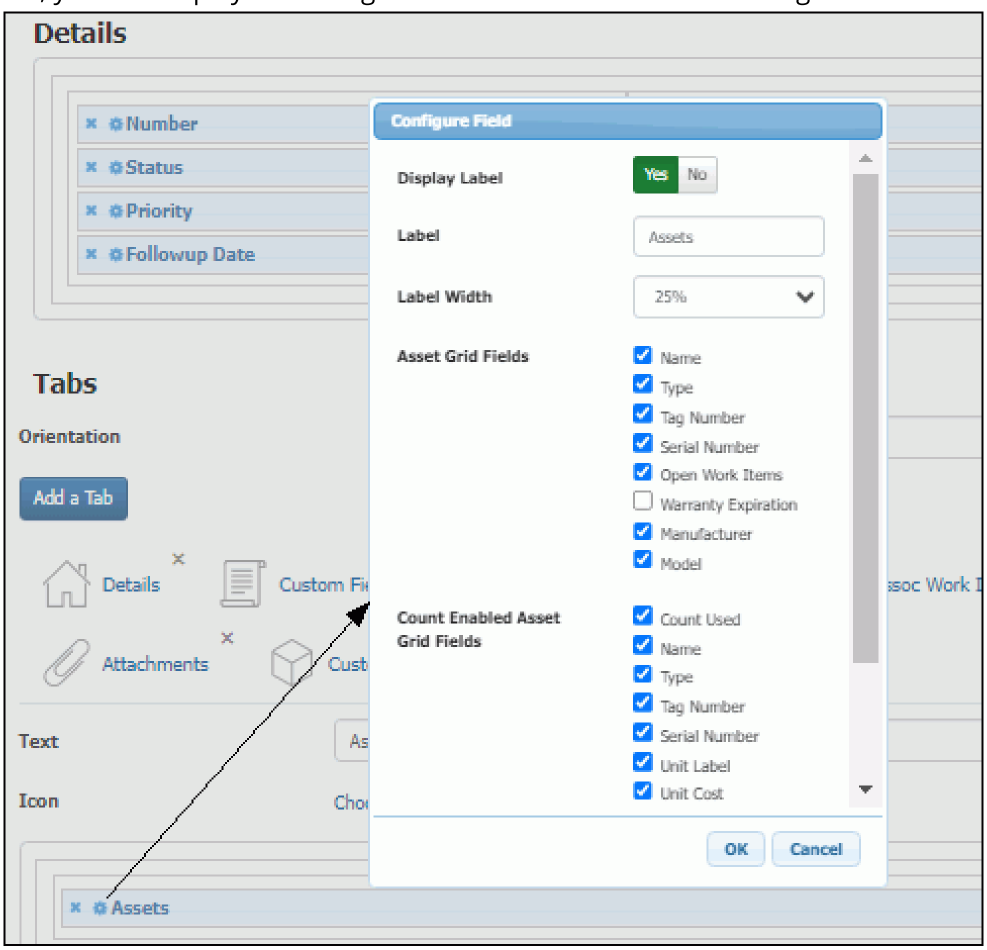
Configuring Fields

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.

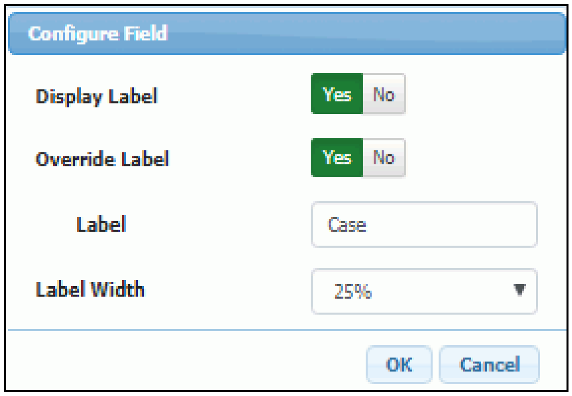
Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, change type, CI type, and cost center. When you drag the **Custom Fields** field under the List 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.



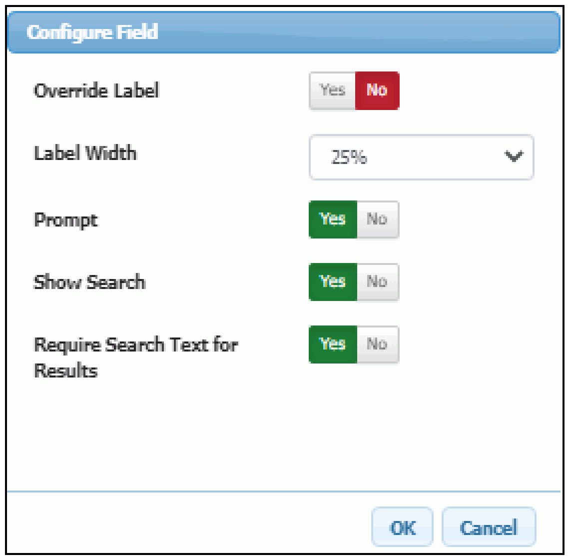
For work item layouts, you can display an asset grid for the Asset field via the Configure Field icon:



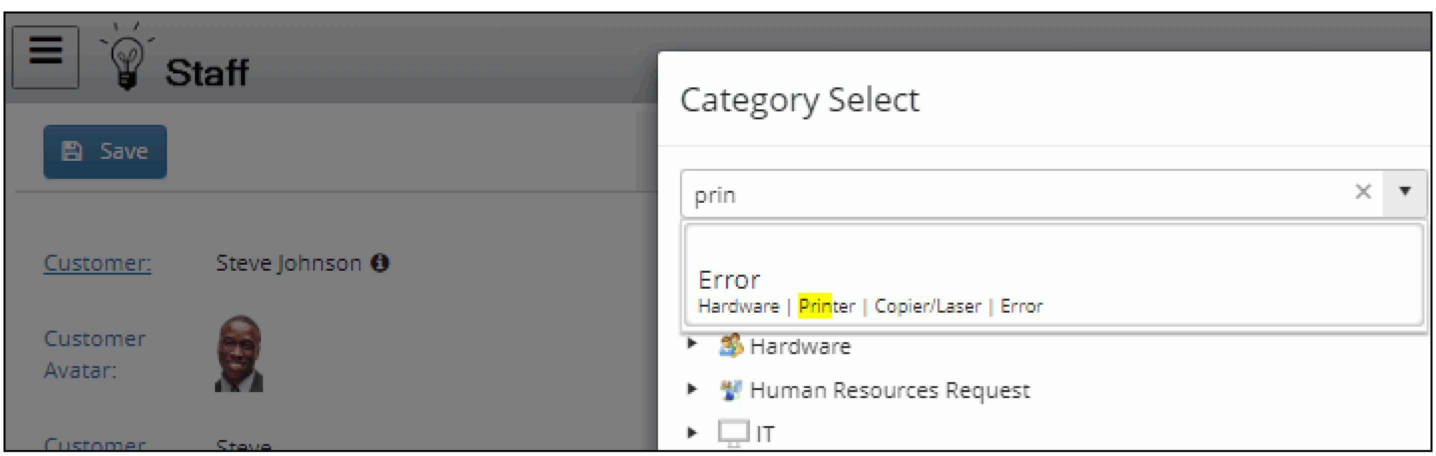
- Select Yes in the **Override Label** field to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



- If configuring the **Category** field:

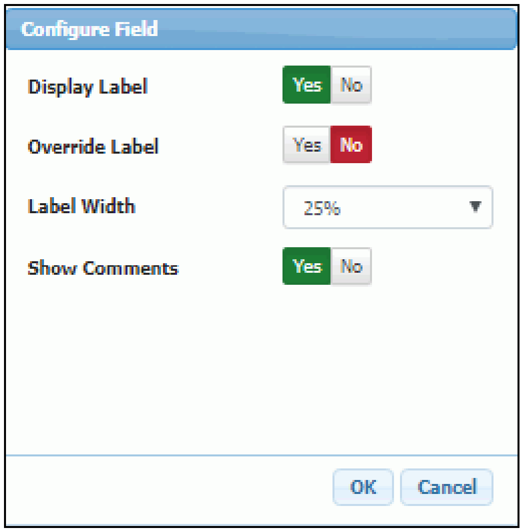


  - Select Yes in the **Prompt** field to initially display the Category Select dialog when the Incident or Change Submit screen appears.
  - Select Yes in the **Show Search** field to include a search field in the Category Select dialog.



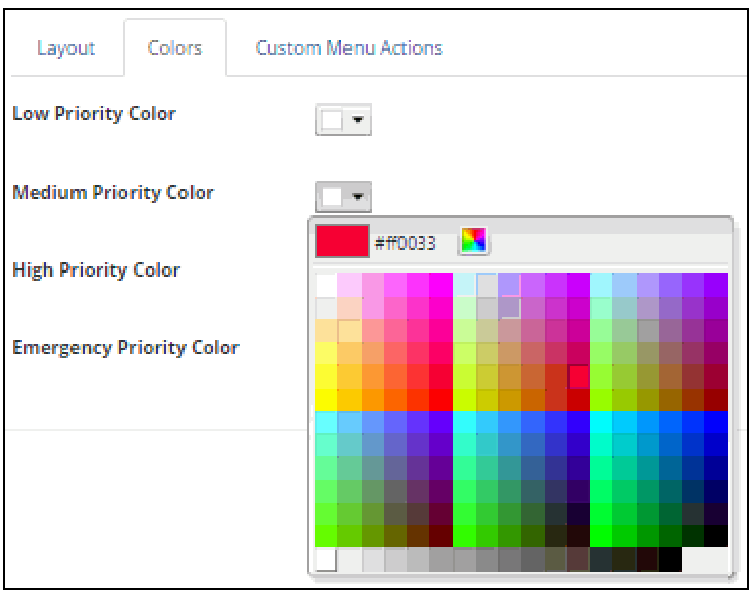
  - Select Yes in the **Require Search Text for Results** field to prevent display of the results until the user has started typing.

- 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).



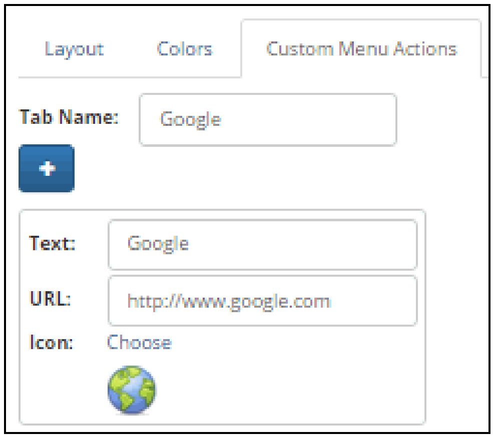
Configuring Priority-Based Background Colors

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.

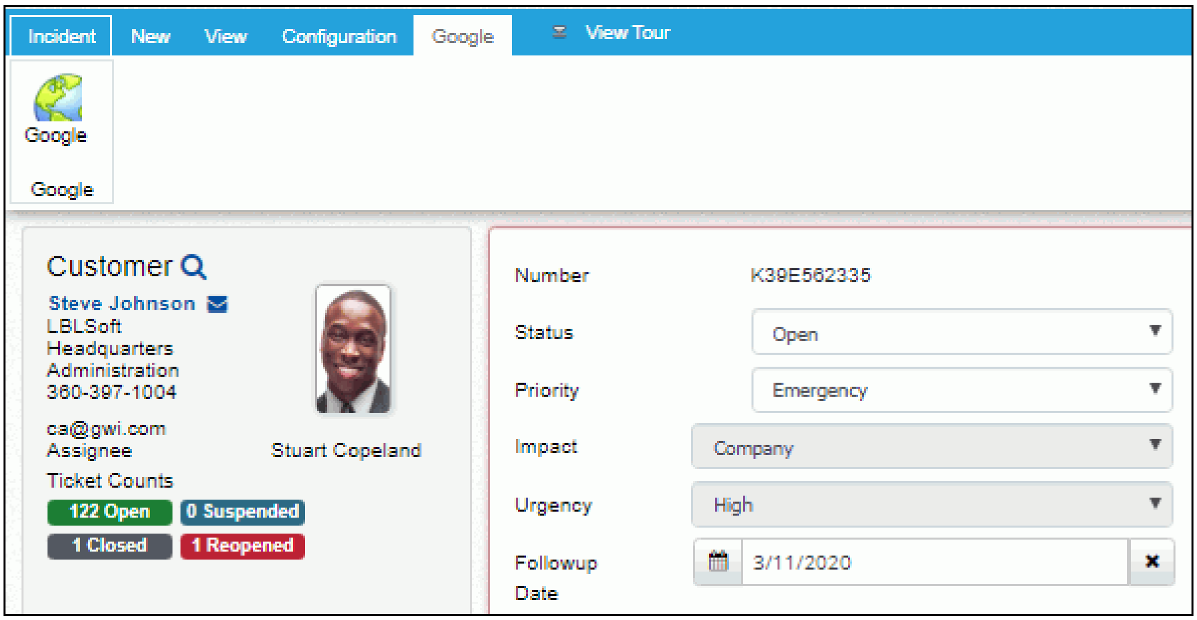


Configuring Custom Menu Actions

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 Rules and Rule Groups for Changes

Use the Change Rules screen to create **rules** that will perform actions when specified conditions based on Change record fields or events are met. This functionality can be used to:

- Change values in the Assignee, Category, Status, Type, Customer, Impact, Urgency, Priority, Email Account, Due Date, Review Date, and Scheduled Implementation Date fields, as well as in any custom fields. An email server account and template can also be set for a change.
- Create a related change and apply a change template or hierarchy template
- Send notification via email, Desktop, and SMS
- Initiate an approval cycle
- Route via load balancing or the round robin method
- Execute a webhook for posting Change data to a web application

In order for a rule to be evaluated, it must be included in a **rule group**; rule groups are applied to changes through customers, companies, category combinations, and change and change hierarchy templates. (A default rule group will apply if none are applicable.) When a change is saved, the matching rule group is first determined. Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed.

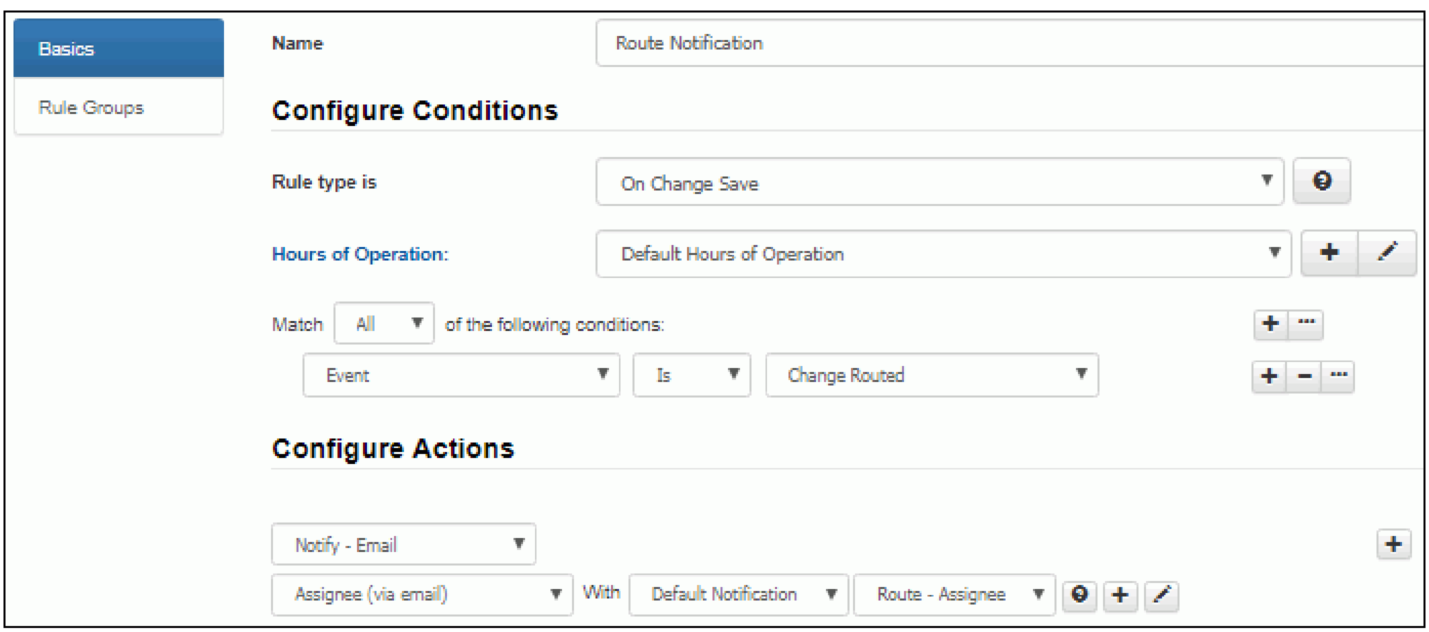
A default change rule group will be included in iSupport on installation or upgrade. Upgrades will convert previously configured Service Level Agreement functionality into rules and rule groups. You can use the Change Rule Groups screen to create new rule groups and assign them to customers, companies, category combinations, and change and change hierarchy templates. (You can also assign rule groups via those entry screens.) See "Creating Rule Groups" on page 61 for more information.

If a customer profile does not have an associated rule group, the rule group associated with the customer's company will be used for the customer. Any rule group associated with a change template or hierarchy template will take precedence for a change; in the absence of a template, a setting in the Change Basics configuration screen will determine what will take precedence if a change's customer and the selected categorization both have a rule group.

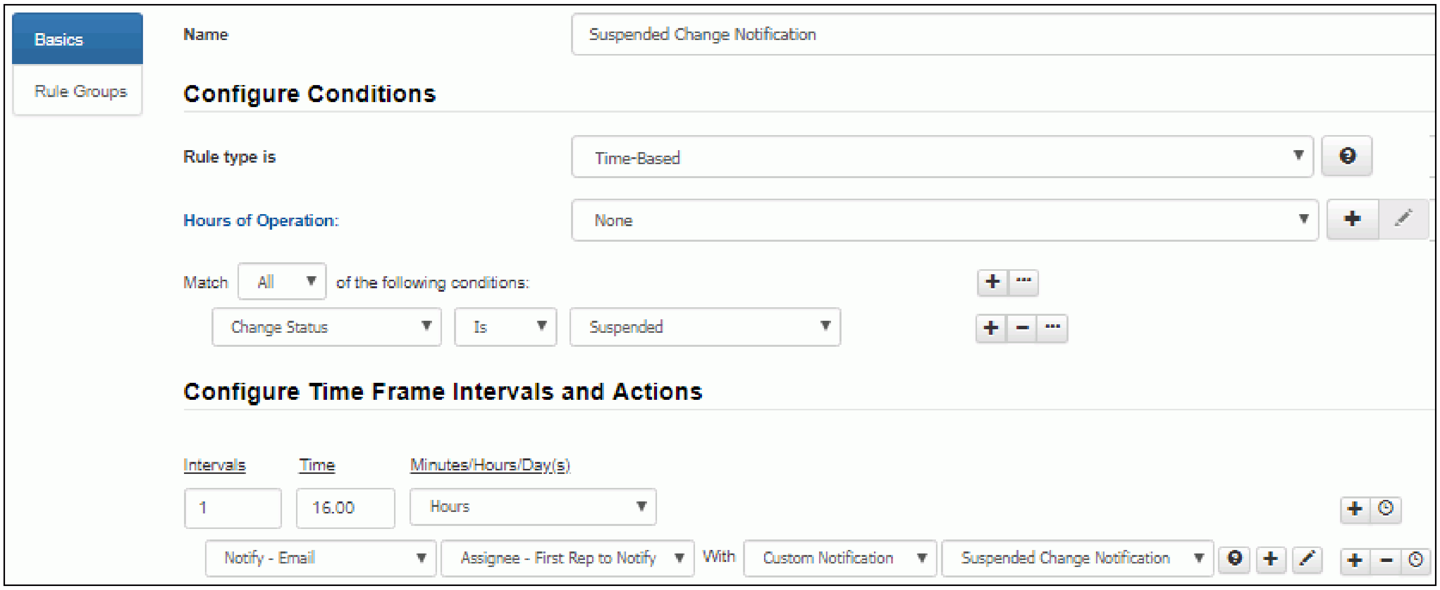
Note that rules in the associated rule group will not execute while a change is pending approval.

Rule Types

- **On Change Save** rules do not incorporate time frames; when a change is saved, rules in the associated rule group are evaluated, and if true, their actions are performed.



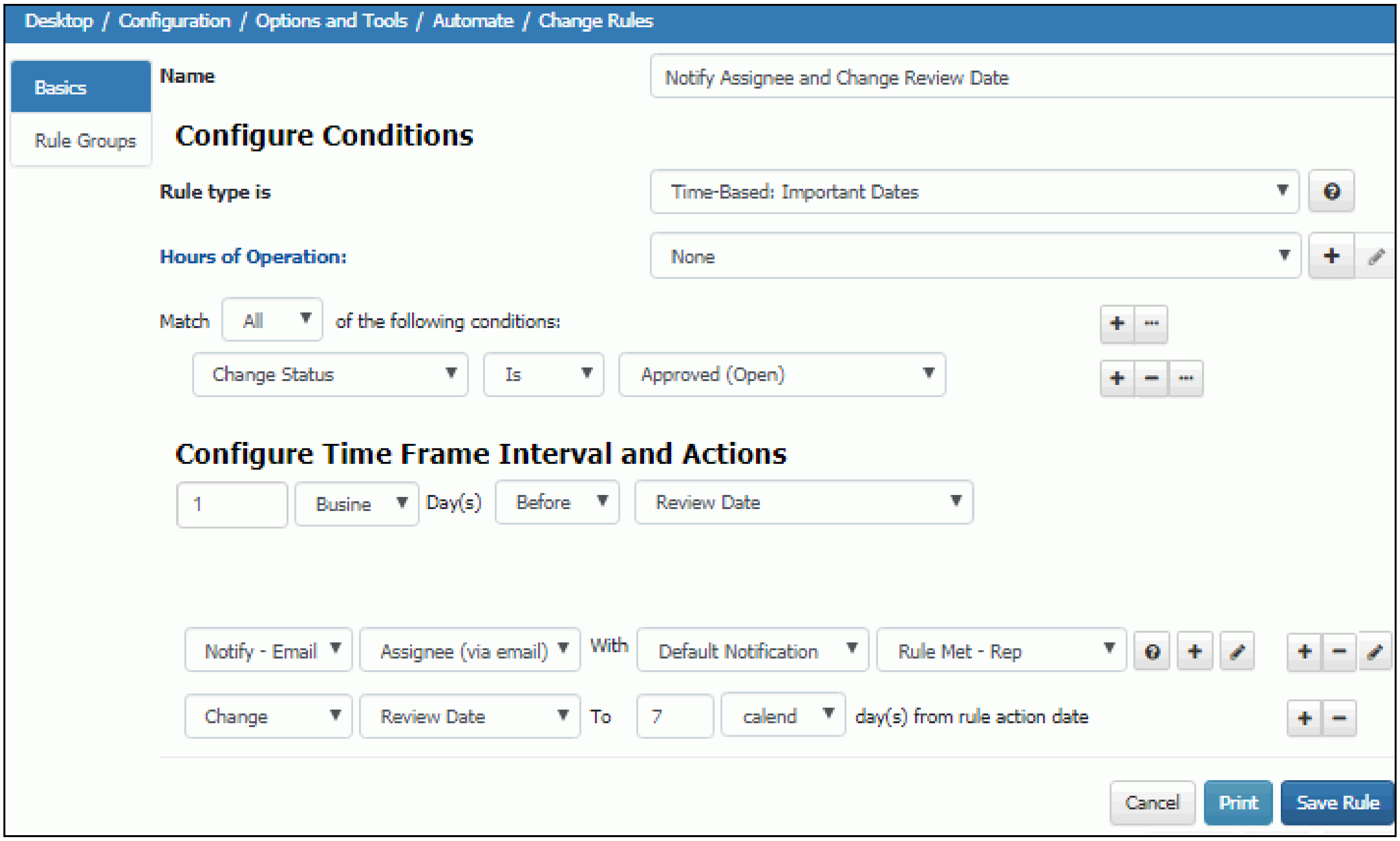
- **Time-Based** and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon change save, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.



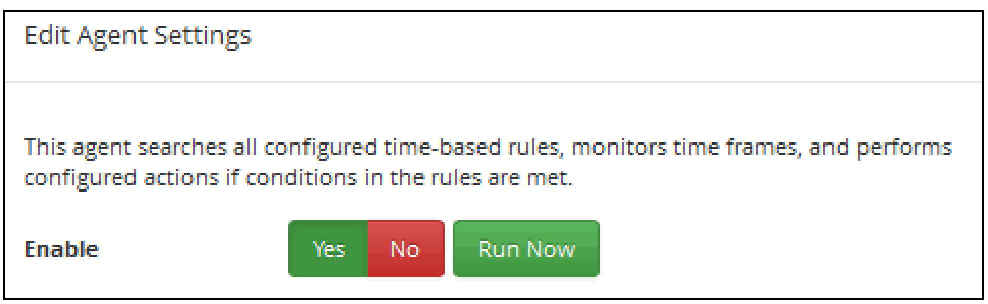
If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **Time-Based** rules will clear all pending actions and if conditions are met again the time frame will restart.
- **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

- **Time-Based: Important Dates** rules enable you to specify a number of days before or after the value in a specified date field (Due Date, Review Date, Scheduled Implementation Date, or a custom field). This type of rule will be evaluated when the defined number of days before or after the value in the specified date field occurs. Actions will be performed if the rule's conditions are met at the time the Time-Based Rule agent runs.



If you are configuring Time-Based rules, ensure that the Time-Based Rules agent is enabled via the button in the Rules list screen.



Note: If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

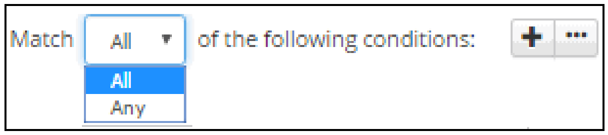
Creating Rules

Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections “Configuring Conditions” on page 51 and “Configuring Actions” on page 52 for more information. See “Creating Time Frame Intervals for Time-Based Rules” on page 57 for information on configuring interval time frames and actions to perform with each set of intervals.

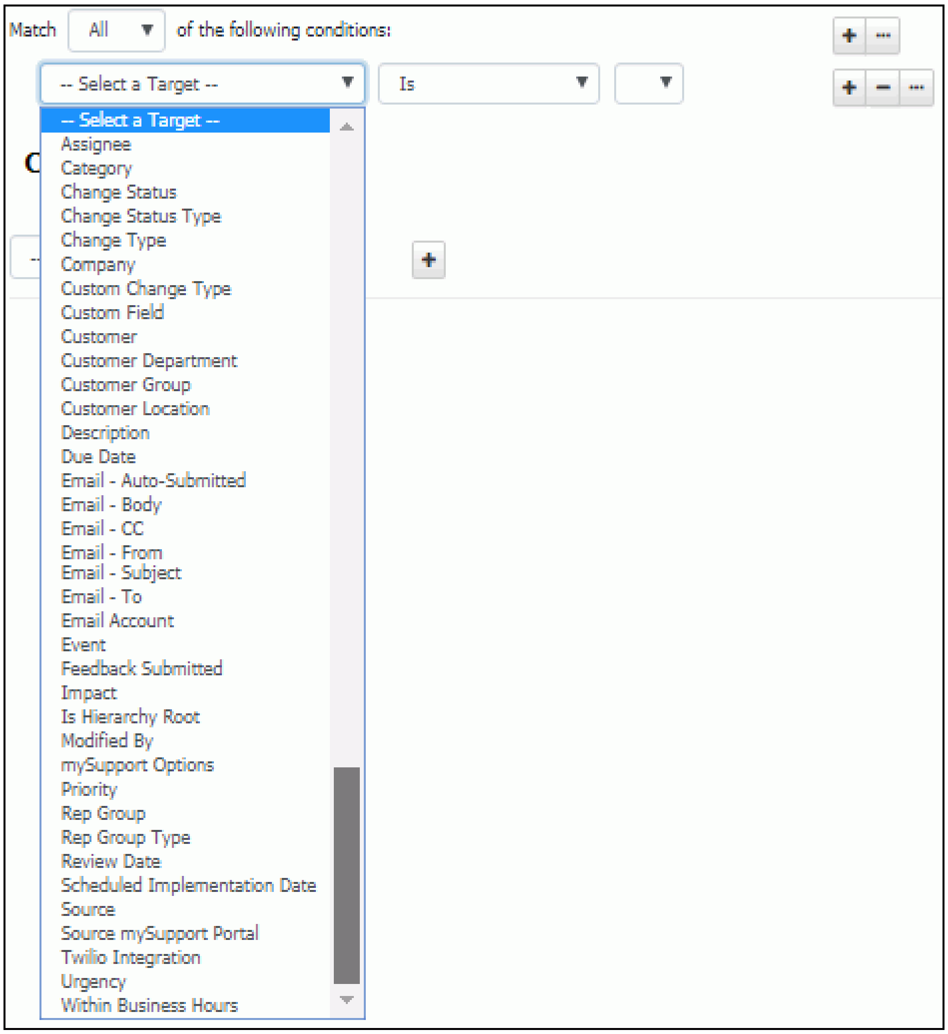
A configured **Hours of Operation** definition of 24 hours a day/seven days a week or selected date and time ranges can be used for the effective time frame for a time-based rule and for an on-save rule with a condition that includes "Within Business Hours". The default Hours of Operation definition assigned to a rule group will apply if no definition is selected for one of its rules. If a definition is selected for both a rule and its rule group, the definition assigned to a rule will take precedence.

Configuring Conditions

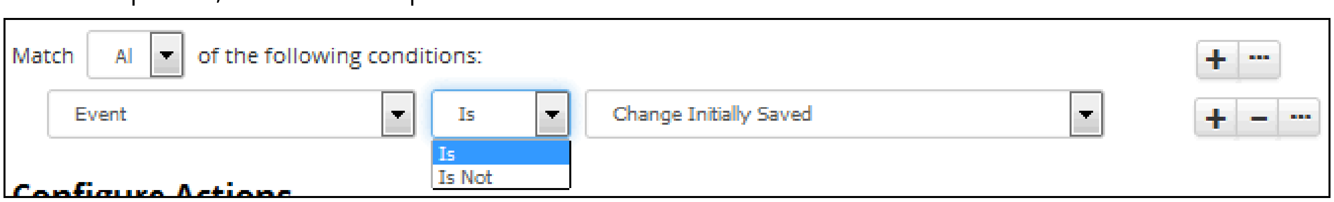
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



Use the + Add Condition and − Remove Condition options to display and remove a set of condition dropdown fields (a list of fields, a list of comparison methods, and a list of values applicable to the selected field) to evaluate upon change save. In the Select a Target dropdown, select what to evaluate: a change field or event, or whether it is within business hours.



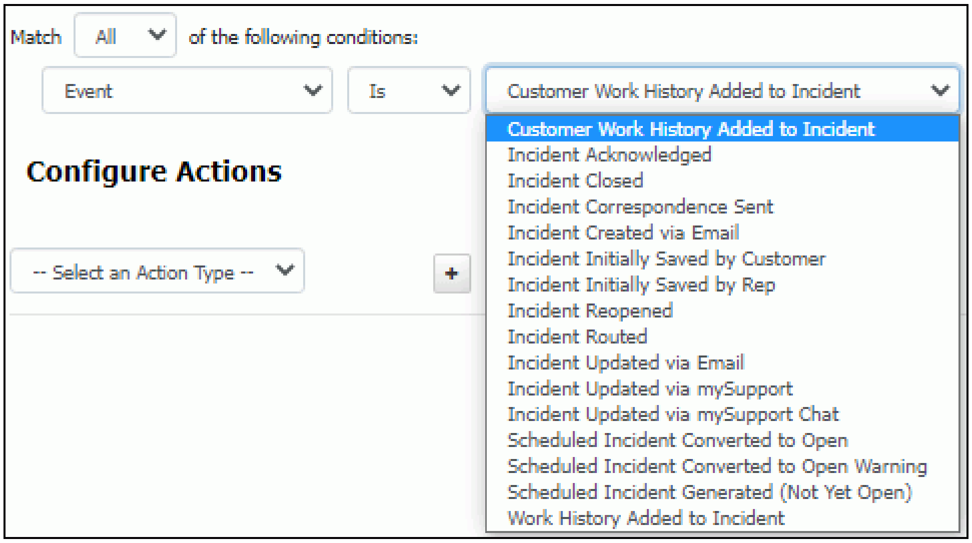
In the next dropdown, select the comparison method.



Note that:

- **Contains** returns a true result if the value is included in the field but other characters are included in a field as well; the value can be embedded in a word.
- **Is** returns a true result if the value is the only set of characters included in a field.

Finally, select the value to be used with the comparison method.

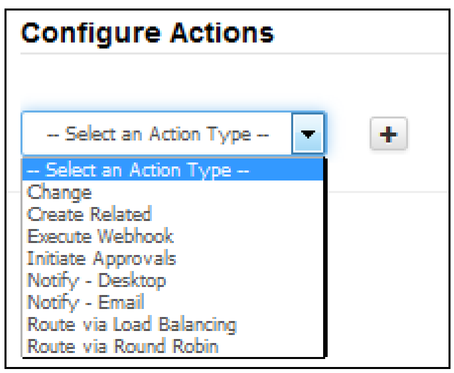


Note: If a rule contains a condition with the Customer Work History Added or Work History Added to Change event, the rule will be triggered immediately when the event occurs (even if the change hasn't been saved). Conditions for all of the rules in the rule group will be evaluated and actions will be performed if conditions are met. Any other modifications in the change will not be saved until the support representative saves the change.

Select Add Condition if you wish to include another condition. You can select Add Condition Group to put a set of conditions to be evaluated together in a group.

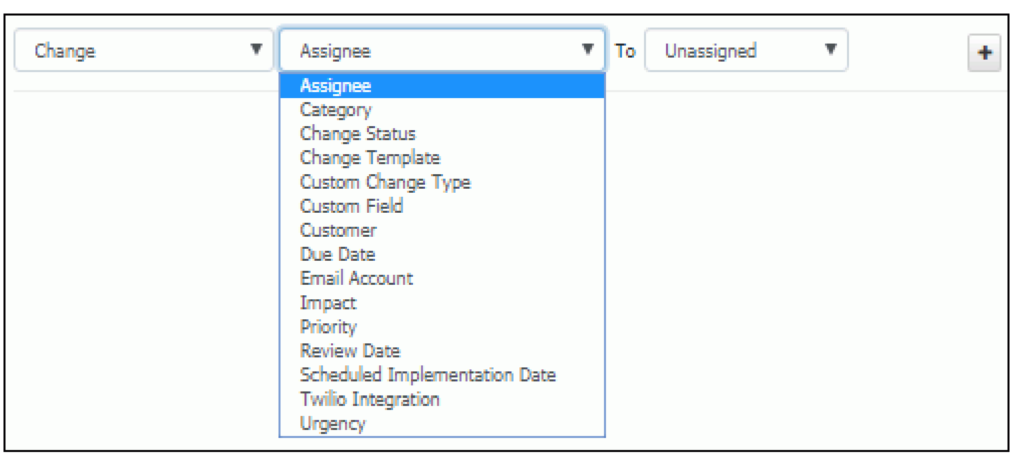
Configuring Actions

Use the Actions section to select the actions to perform when the conditions are met. After creating the first action you can use the Add Action option to create another action. Select Remove Action to remove any action lines.

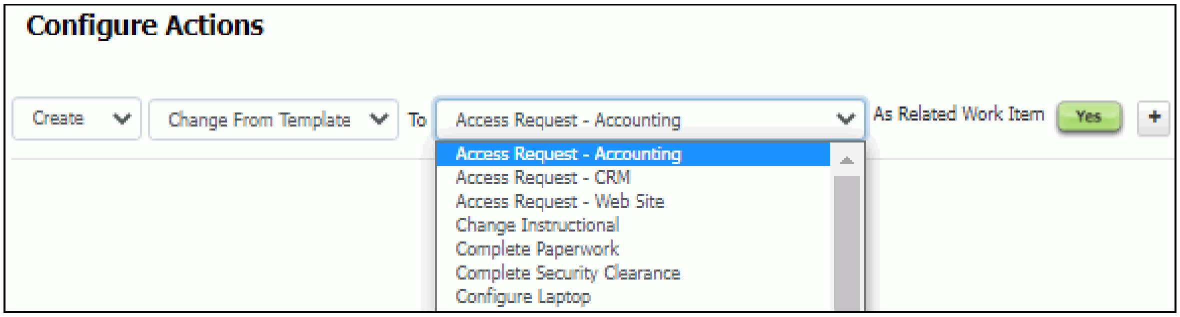


You can configure the following actions:

- **Change a field** by selecting Change, the field to change, and the value to change it to.

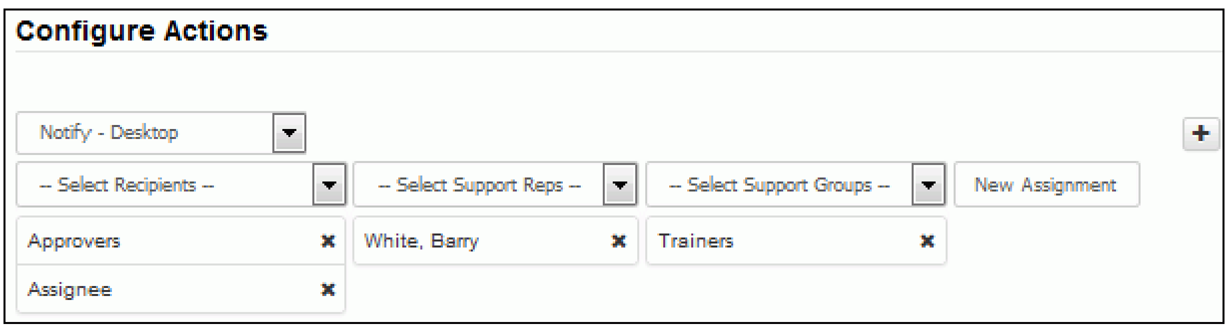


- **Create a change** and apply a change template or hierarchy template by selecting Create, Change From Template, the template to apply. In the As Related Work Item field, select Yes to create the work item as related to work items created from the selected template, or No to create the work item as separate from work items created from the selected template.

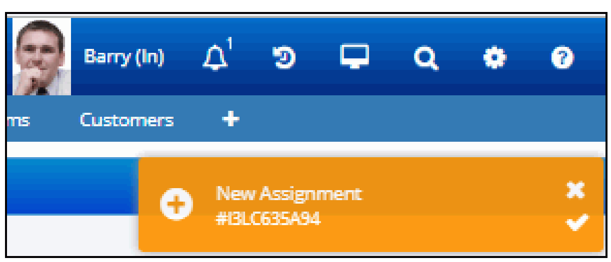


- **Execute a configured webhook** for posting Change data to a web application. See “Configuring Webhooks” on page 115 for more information.

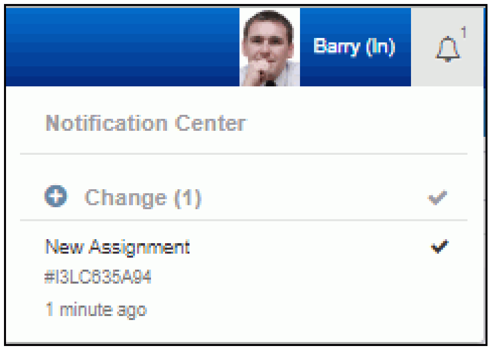
- **Send a notification** via Desktop, email, or SMS.
  - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



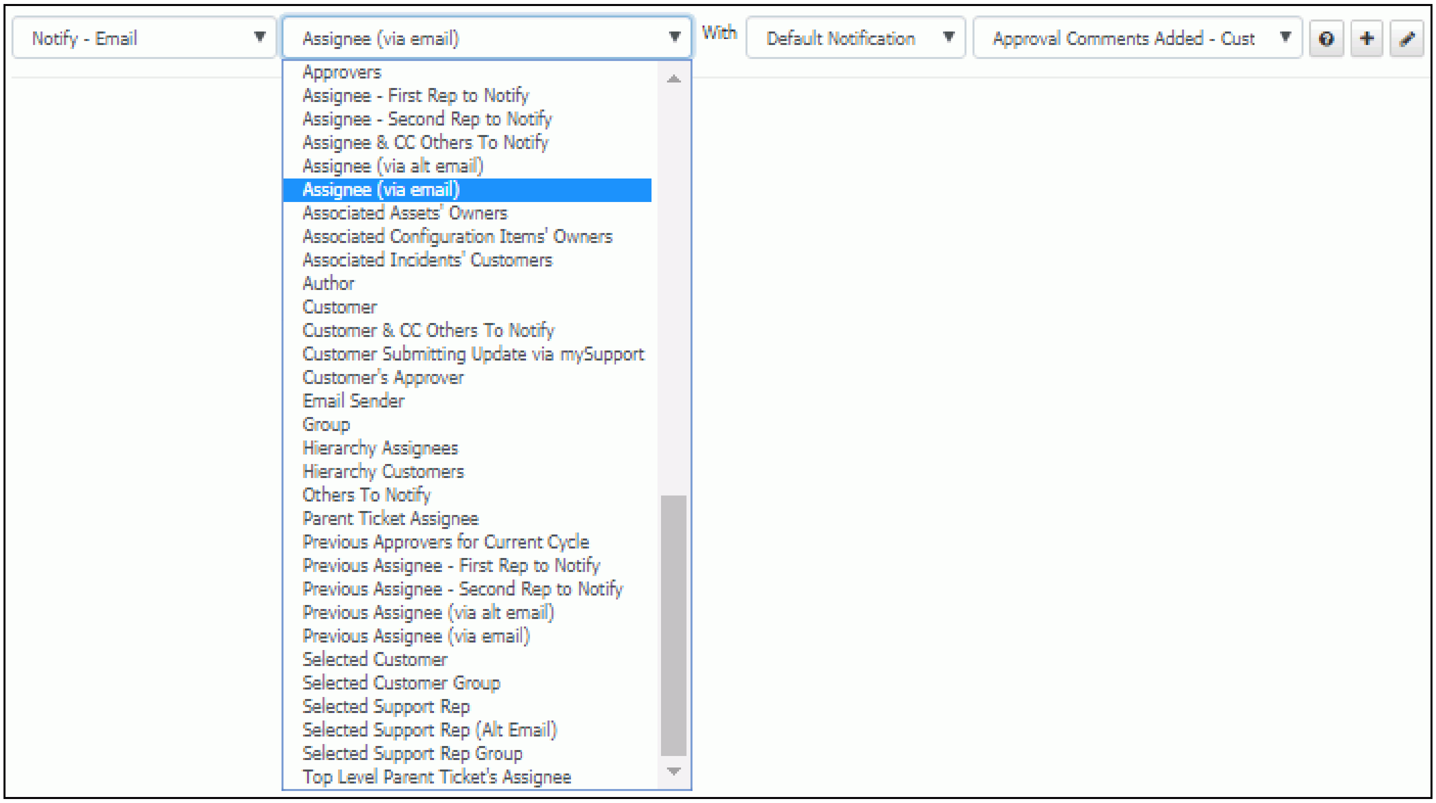
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.



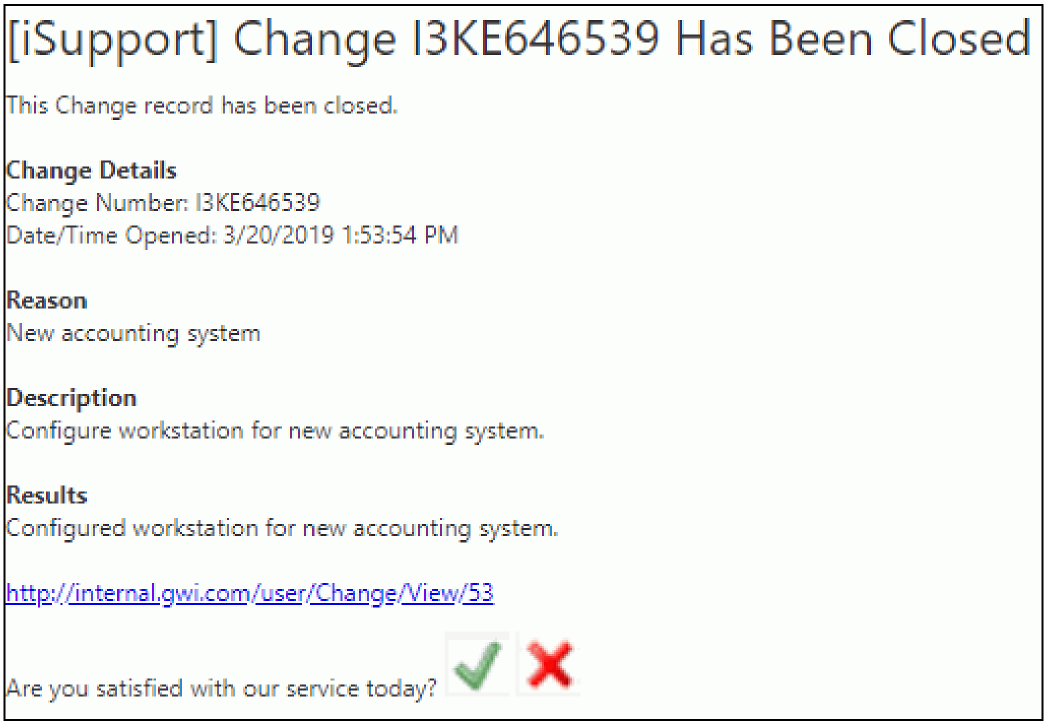
- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.



You can select the default or a custom notification; select Show Notification to display the contents of a selected notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient. Use the Create New and View/Edit options to access the Custom Notification screen; see "Customizing and Viewing Event Notification Content" on page 64 for more information.

Adding Feedback

If the Feedback feature is configured in Feature Basics, you can include response choice image links at the bottom of a change notification.



[iSupport] Change I3KE646539 Has Been Closed

This Change record has been closed.

Change Details
Change Number: I3KE646539
Date/Time Opened: 3/20/2019 1:53:54 PM

Reason
New accounting system

Description
Configure workstation for new accounting system.

Results
Configured workstation for new accounting system.

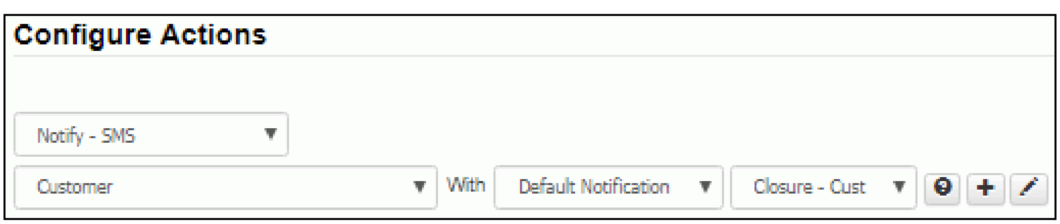
http://internal.gwi.com/user/Change/View/53

Are you satisfied with our service today?

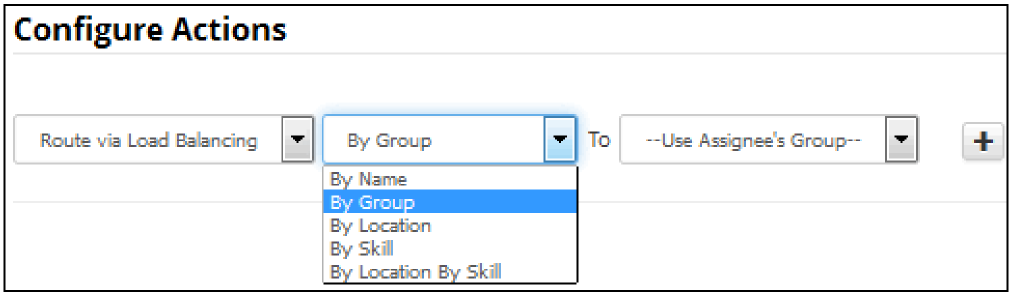
When a customer receives the email and clicks one of the responses, configured submission text will appear on a page on the mySupport portal, and the feedback question and response will be included in the Feedback field on the change. Note that this feature is intended for HTML-type mail delivery.

The Include Feedback field will appear if the Feedback feature is configured; select Yes to include the specified prompt in the notification.

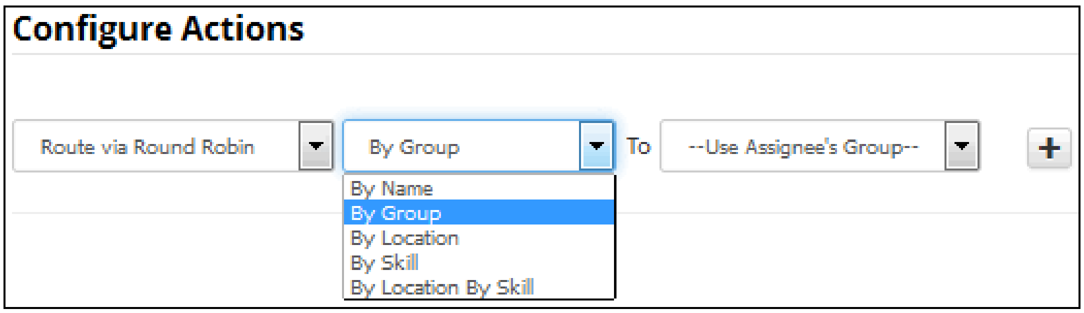
- **SMS:** To send an SMS notification, select Notify - SMS, the recipient, and the notification to be sent. The contents of the SMS Text field in the custom notification will be sent; if that field is blank or if it is a default notification, the contents of the Subject field will be used. If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. If sending to a customer, the message will be sent to the following in their Customer Profile record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the SMS email from mySupport (email to text); if that is unavailable, the address in the Email field. See “Configuring Twilio Integrations” on page 67 for more information on Twilio integration.



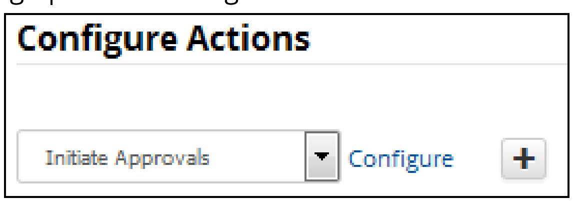
- **Route the Change record via load balancing** by selecting Route via Load Balancing, the route method, and the recipient if applicable. Load-balanced routing is enabled on the Change Management tab in the Feature Basics screen.



- **Route the Change record via round robin** by selecting Route via Round Robin, the route method, and the recipient if applicable. Round robin routing is enabled on the Change Management tab in the Feature Basics screen.

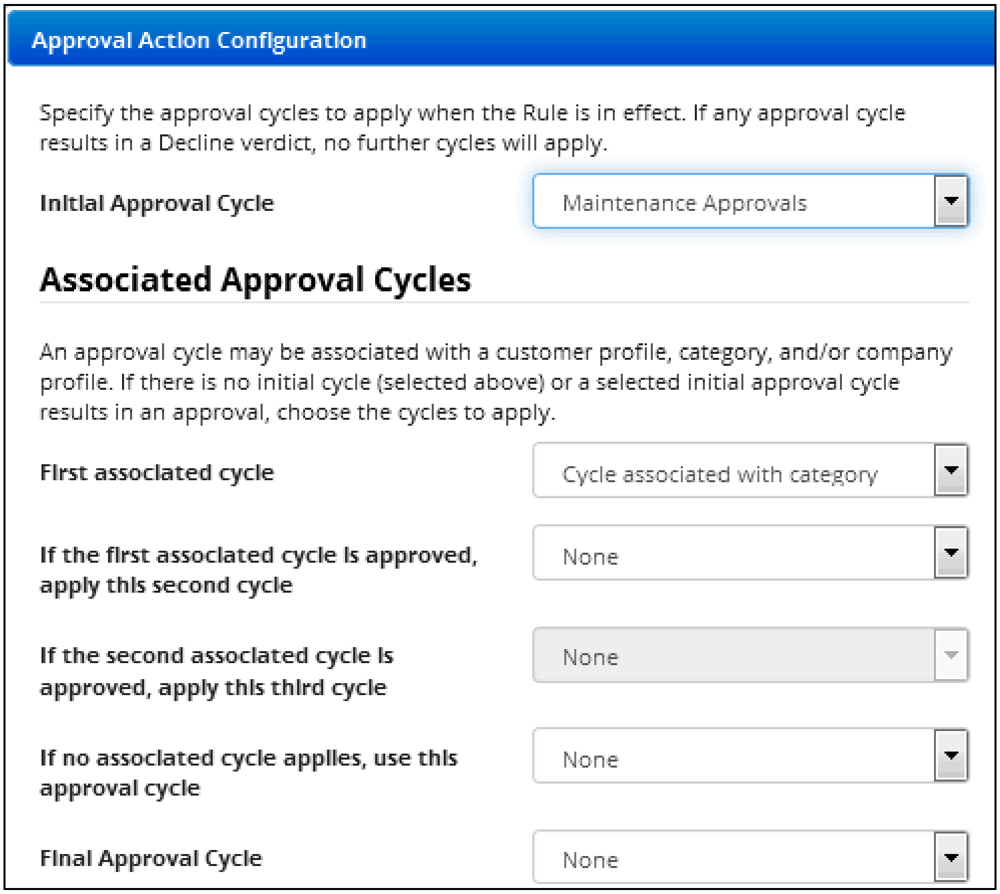


- **Initiate approvals** by selecting Initiate Approvals and clicking the Configure link. Approval cycles are enabled on the Basics tab in the Core Settings | Global Settings screen.



iSupport's Approval feature requires a change to be approved by designated approvers before it can be closed. The rule in effect can initiate one or more approval cycles, and approval cycles can be associated with customers, companies, categories, and change and hierarchy templates. See "Configuring Approval Cycles" on page 98 for information on creating an approval cycle, specifying approvers and statuses, and configuring approval-related notifications via the Approval Cycle configuration screen.

The Approvals dialog appears for you to specify the initial approval cycle, any additional cycles to apply if there is no initial approval cycle or the initial cycle results in an approval, and the final cycle to apply. Note that any changes to these settings will not affect current changes pending approval, and rules in the associated rule group will not execute while a change is pending approval.



Initial Approval Cycle - Select the predefined approval cycle to apply when the rule group is in effect for the change.

First Associated Cycle - Select the approval cycle to apply if there is no initial approval cycle or the cycle specified in the Initial Approval Cycle field results in an approval.

If the First Associated Cycle is Approved, Apply This Second Cycle - This field appears if an associated cycle was selected in the previous field. Select the approval cycle to apply if the cycle specified in the First Associated Cycle field results in an approval. You can select Cycle Associated With Customer, Cycle Associated With Category, or Cycle Associated with Company.

If the Second Associated Cycle is Approved, Apply This Third Cycle - This field appears if an associated cycle was selected in the previous field. Select the approval cycle to apply if the cycle specified in the previous field results in an approval.

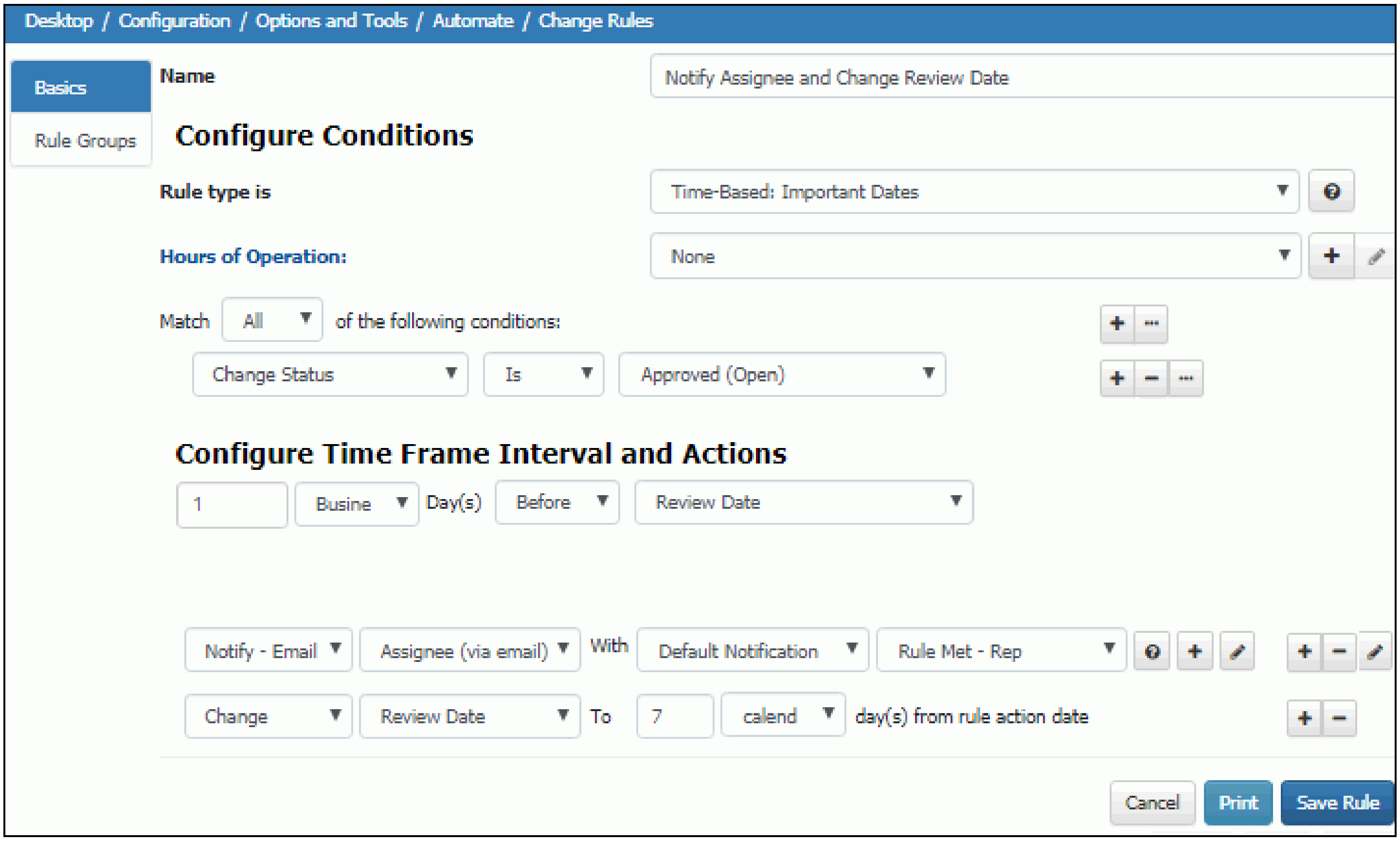
If No Associated Cycle Applies, Use This Approval Cycle - This field appears if Cycle Associated With Customer, Cycle Associated With Category, Cycle Associated With Company, or Cycle Associated With Template was selected in one or more of the previous three fields. Select the predefined approval cycle to apply if there are no approval cycles associated with the customer, customer's company, template, or categorization of the change.

Final Approval Cycle - Select the predefined approval cycle to apply after all previously applied cycles result in an approval.

Creating Time Frame Intervals for Time-Based Rules

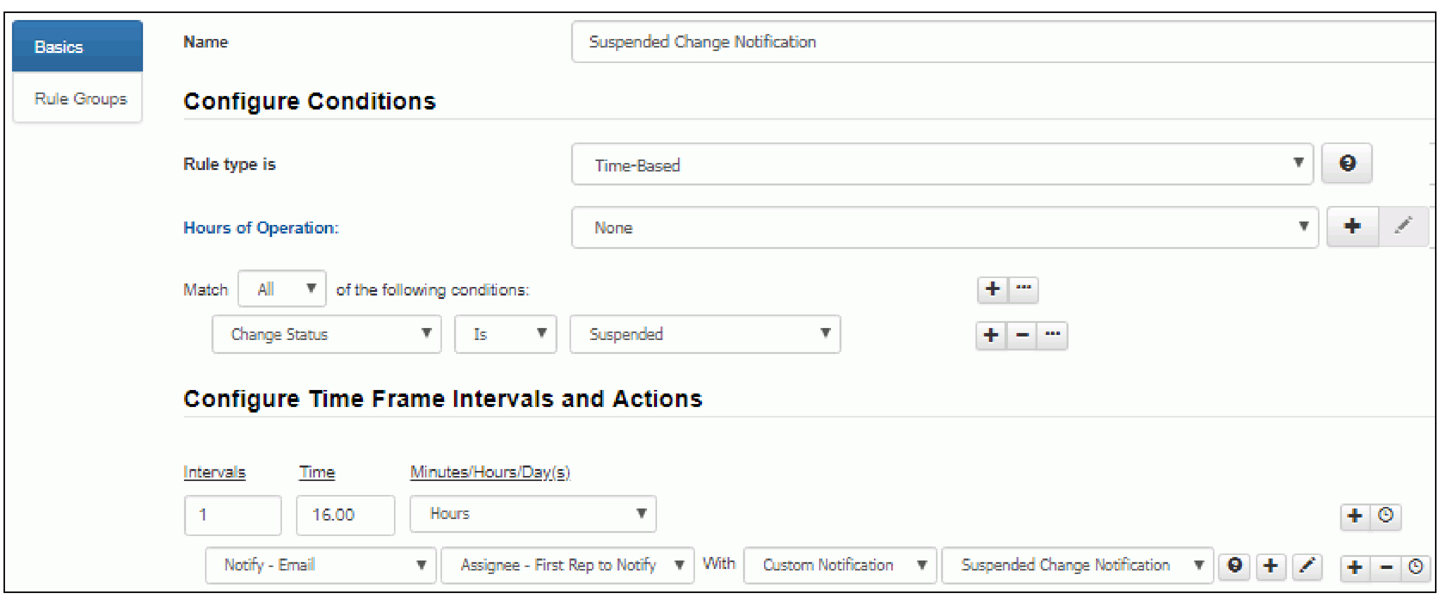
Time-Based: Important Dates Rules

Time-Based: Important Dates rules enable you to specify a number of days before or after the value in a specified date field. This type of rule will be evaluated when the defined number of days before or after the value in the specified date field occurs. Actions will be performed if the rule's conditions are met at the time the Time-Based Rule agent runs.



Time-Based and Time-Based: Cumulative Rules

With Time-Based and Time-Based: Cumulative rules, the Time Frame Interval Settings section will include Intervals, Time, Minutes/Hours/Day(s) fields as well as a set of fields for entering an action to be performed when the condition is met for the interval time frame. The difference between these rules is that, if conditions change prior to the configured interval settings, **Time-Based** rules will clear all pending actions and the time frame will restart if conditions are met again; **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

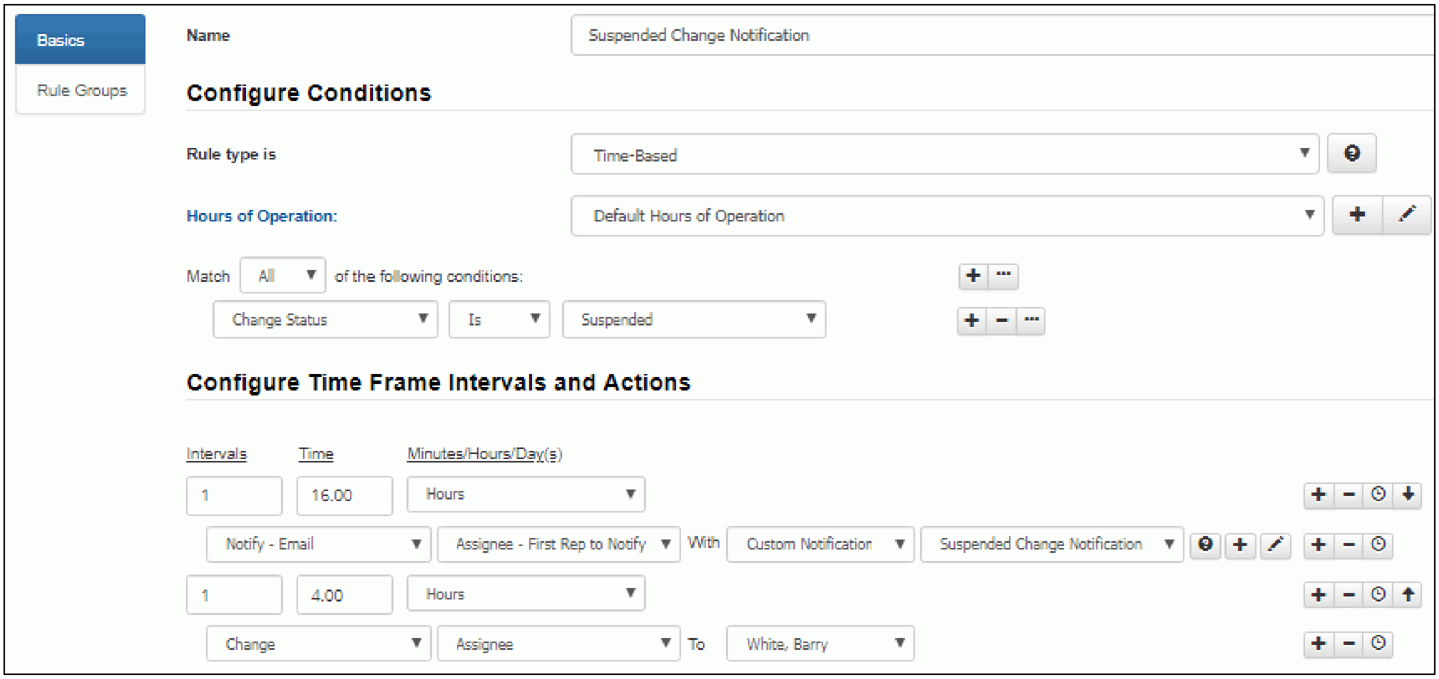


In the Configure Time Frame Intervals and Actions section, use the Intervals field to specify the number of times a time frame should be established and monitored, and use the Time and Minutes/Hours/Day(s) fields to specify the amount and unit of time (in minutes, hours, or days) in the time frame. *Note that the Day(s) option is calculated with one day equal to 24 business hours.* Use the dropdowns in the indented actions line to specify the actions to perform if conditions are met for that interval time frame. In the example above, the change will be monitored for 16 hours after initial save; if the change status remains at Suspended for the entire 16 hours, the Suspended Change notification will be sent to the assignee's first rep to notify.

History entries related to time-based rules will include the term "exceeded" if conditions have not been met within a defined interval, and the term "fulfilled" if a rule is invalidated or reset due to a change in rule configuration.

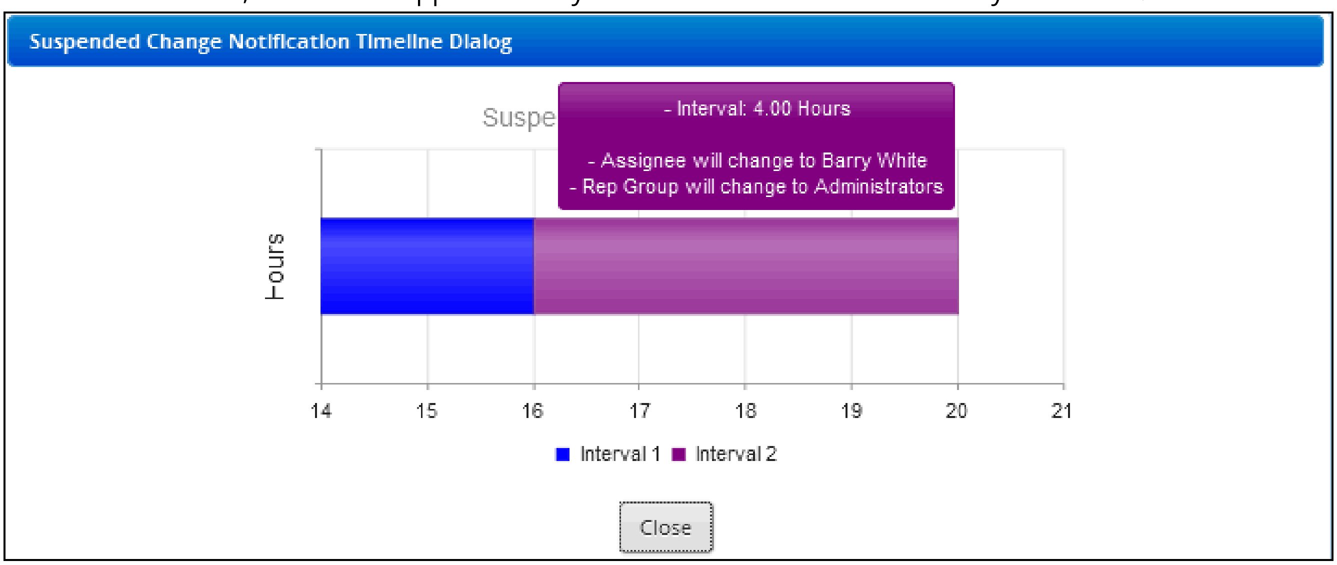
Configuring Multiple Time Frame Intervals

You can select Add Interval to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up options will appear for changing the order in which the interval time frames will be evaluated. In the example below, the change will be monitored for an eight hour time frame and if the priority remains at Emergency for the entire eight hours, the Emergency Priority Warning - Rep notification will be sent to the assignee. The change will then be monitored for an additional four hour time frame and if the priority remains at Emergency for the entire four hours, the change will be reassigned to the support representative Barry White.



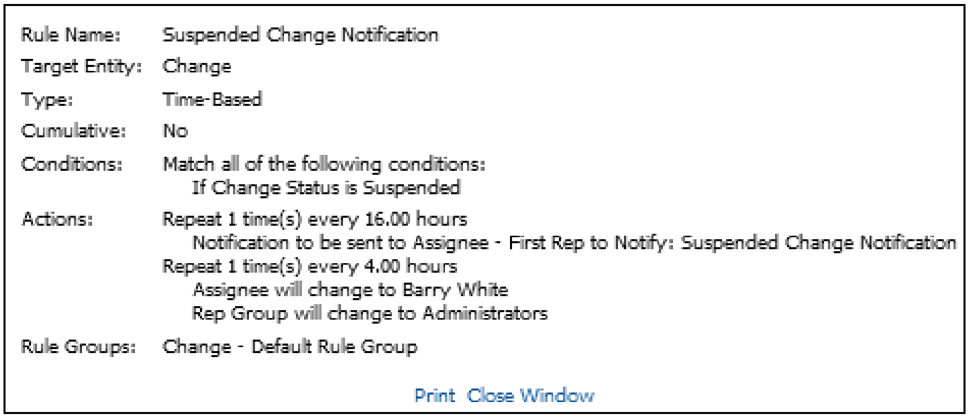
Displaying a Timeline for Configured Time Frame Intervals

Use the View Timeline button at the bottom of the screen to display a dialog with a gauge chart depicting the time frames for each interval; actions will appear when you hover over a time frame with your mouse.



Printing a Rule

Click the Print button to display a summary of your entries; you can click the Print link in the dialog to send the information to the printer.



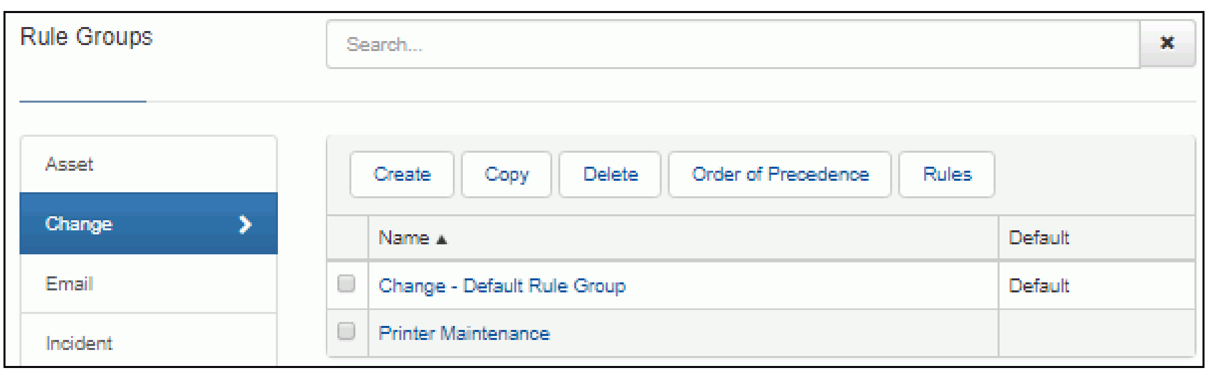
Associating Rules With Rule Groups

After creating a rule, you'll need to include it in a rule group. You can do this via the Rule Group tab in the Rules screen, or via the Rule Group screen. On the Rule Groups tab, click the Add link. Rule groups configured via the Rule Group screen appear; select the applicable group(s) and click OK. The rule group displays along with its position as shown below:

All rules in the rule group associated with a change are evaluated when a change is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence. You can use the Create button to create a rule and add it to the current rule group.

Creating Rule Groups

Click the Create link in the Change Rule Groups screen to create a rule group that can be used as default and/or applied to customers, companies, categories, and templates and hierarchy templates.



Complete the fields at the top of the Rule Groups screen.

Name - Enter a name for the rule group; this name will appear in the Change screen when the rule group is in effect for a change.

This is the Default Change Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the categorization, change or hierarchy template, or customer, associated with a change.

More than one rule group may apply to a change; if a change or hierarchy template selected for the change has a rule group, it will override any other rule group that may apply. Use the Winner if Both Customer and Category Rule Groups are Being Used field in the Change Basics screen to specify what is to take precedence if a change's customer and categorization both have a rule group.

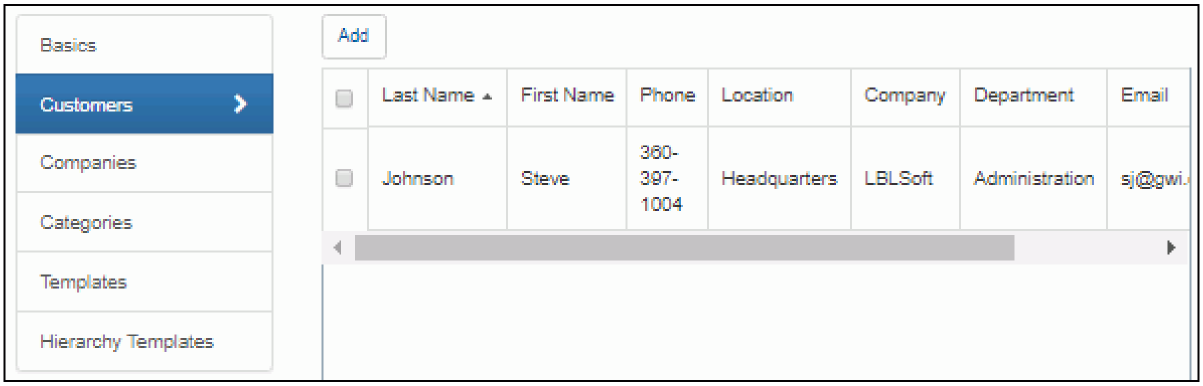
Default Hours of Operation - Select the Hours of Operation definition that will apply if no definition is selected for a time-based rule or for an on-save rule with a condition that includes "Within Business Hours" in the rule group. Use the + Create New and View/Edit options to access the Hours of Operation definition screen.

Adding Rules

Use the Add link on the On Save and Time-Based tabs to add previously configured rules to the rule group. All rules in the rule group associated with a change are evaluated when a change is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Assigning a Rule Group

Use the Add link on the Customers, Companies, Categories, Templates, and Hierarchy Templates tabs to associate the rule group with one or more customers, companies, categories, templates, and hierarchy templates. You can also do this via the Customer Profile, Company, Category, Change Template, and Hierarchy Template screens.

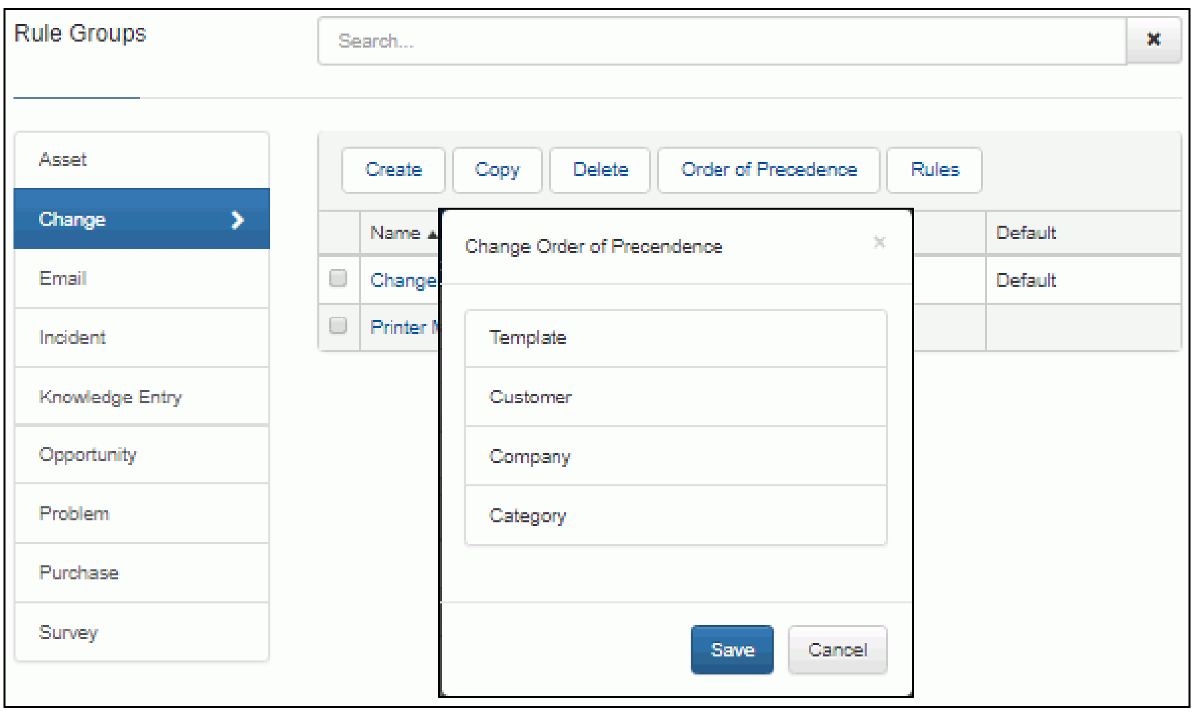


Printing the Rule Group Summary

Click the Print button to display a summary of your saved entries; you can click the Print link in the dialog to send the information to the printer.

Setting the Rule Group Order of Precedence

Use the Order of Precedence button in the Rule Groups list screen to designate which should take precedence if a rule group is associated with a template, customer, company, and/or category in effect for a change.

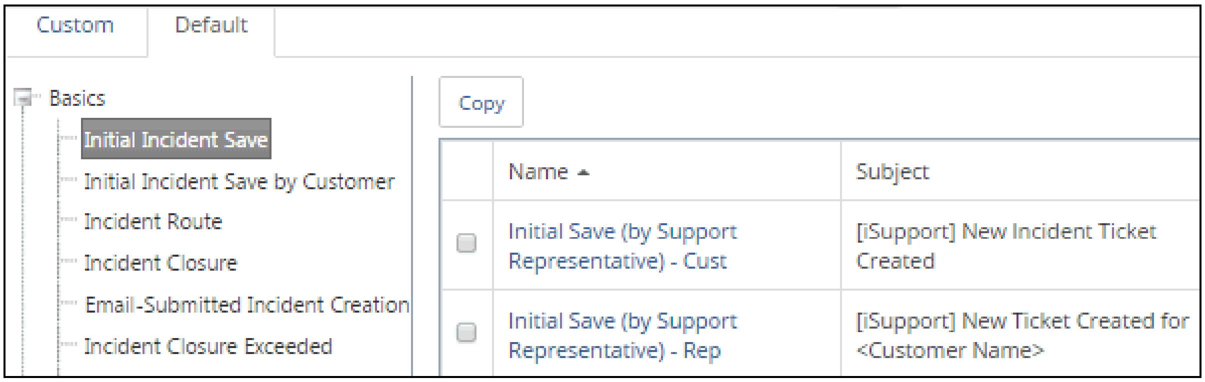


Customizing and Viewing Event Notification Content

Go to Options and Tools| Customize | Custom Notifications to view and customize the content of notifications for iSupport events. All default notifications include "[iSupport]" preceding the subject text, but you can remove that text by creating a custom notification. Event notifications are initiated in two ways:

- For iSupport's Asset, CMDB, Alert, Discussion Digest, and View Subscription functionality, notifications are sent via s configured in the Options and Tools | Administer | s screen.
- For modules with rule-based functionality (Customer, Incident, Problem, Change, Opportunity, Email, Discussion Post, Purchasing, and Knowledge), notifications are sent via rules that will perform actions when specified conditions are met. (The Time-based rule monitors time frames for time-based rules, however.)

In the Custom Notification screen, you can display and copy iSupport's default notifications via the Default subtab, and create new custom notifications via the Custom subtab.



About Recipients

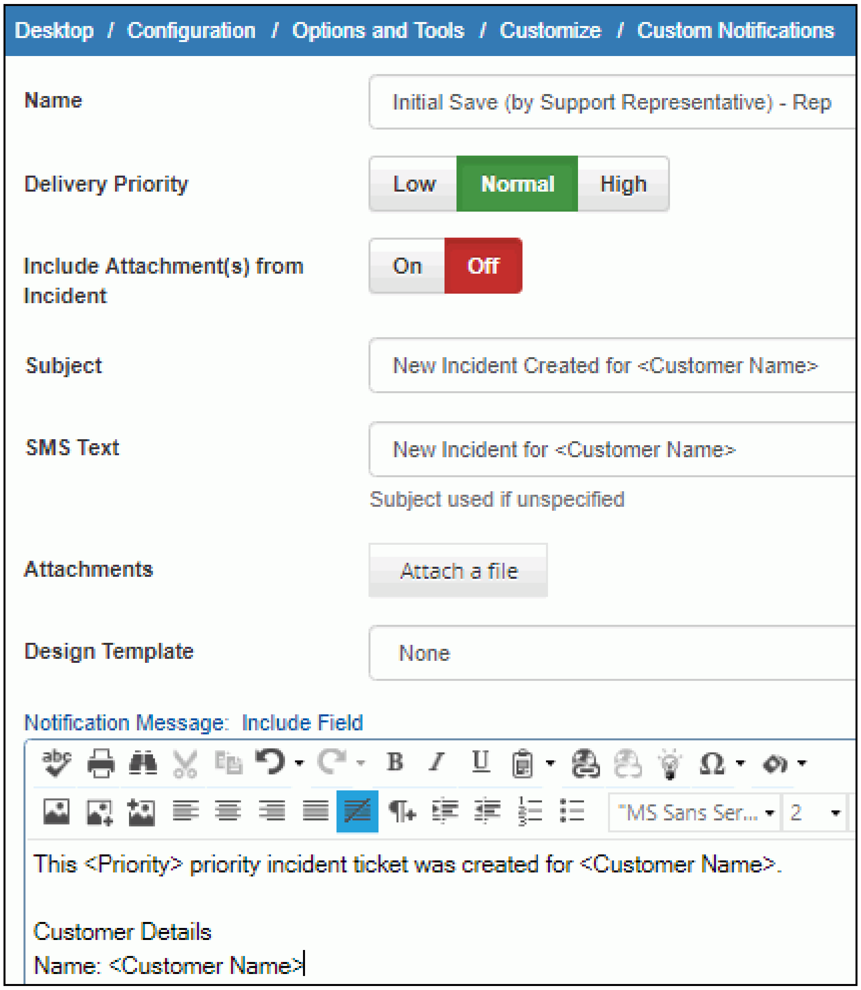
Recipients for default notifications can include both support representatives and customers, and the default notification text is different for each. Support representative notifications (designated as "Rep") typically contain customer details, the priority, the assignee, the URL to Desktop incident, and the URL to Mobile incident. Customer default notifications (designated as "Cust") typically contain a link to the record on a mySupport portal; this link will go to the URL specified in the mySupport Portal Configuration screen.

Duplicates will be checked in order to prevent a recipient from receiving the same notification more than once. However, duplicate notifications to the same recipient may still occur. For example, if the incident creation notification is configured to be sent to the Customer and CC: Others to Notify as well as the Assignee and CC: Others to Notify, and the customer is on the Others to Notify list, the customer could receive a customer-targeted incident creation notification as well as a support representative-targeted incident creation notification, and the link on the support representative-targeted incident creation notification may not be accessible to the customer. Use the Others to Notify views on the Desktop to review potential notification recipients.

Recipient email addresses are validated; if a blank address exists, no attempt will be made to send it. Automatic notifications sent via agent will note errors in the Event Log. If an agent is run manually, errors will also display in a dialog after the agent runs. The SMTP server will be checked for responsiveness; if it is unresponsive, an error will be included in the log and processing will stop for that time. The notification failure threshold is 36 hours and all attempts will be stopped after that point. If a component of a notification is missing and cannot be resolved, an error will be included in the log and the notification will be deleted after 36 hours.

Creating a Custom Notification

Use the Custom Notifications screen to select the delivery priority, enter subject and body text, and attach files for a custom notification. You can include data from the associated record via the Include Field link.



Name - Enter a name for the custom notification.

Delivery Priority - Select the priority level to assign to the email: High, Normal, or Low.

Design Template - If desired, select the design template with the elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). You can select the Create New or View/Edit options to access the Design Template screen; see "Configuring Design Templates" on page 66 for more information.

SMS Text - Enter the text to be sent when a rule using the Notify - SMS action is met. Note that if this field is blank or if it is a default notification, the text in the Subject field will be used.

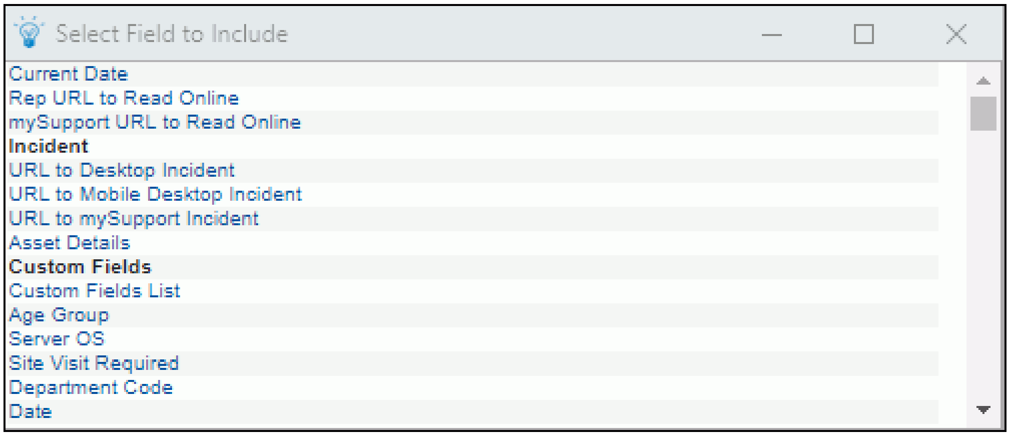
If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. See "Configuring Twilio Integrations" on page 67 for more information.

If sending to a customer, the message will be sent to the following in their Customer Profile record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the SMS email from mySupport (email to text); if that is unavailable, the address in the Email field.

Subject/Notification Message - In the Subject field, enter the subject line for the email notification.

On the Body tab, enter the body of the email notification. You can select the Notification Message link to display a larger window for entry. Use the Include Field link to add field values from the current record. The field will be included in brackets, and the field data will be inserted into the email when it is generated. (If data does not exist for a required field, nothing will be inserted; the field area will be blank.)

You can append **:label:*string*** to the <URL to x> include fields so the link displays as linked text rather than the full URL. The <Rep URL to Read Online> and <mySupport URL to Read Online> include fields will include a link for viewing the email on the web (typically for customers who aren't able to see an email properly rendered with linked images via their mail client).



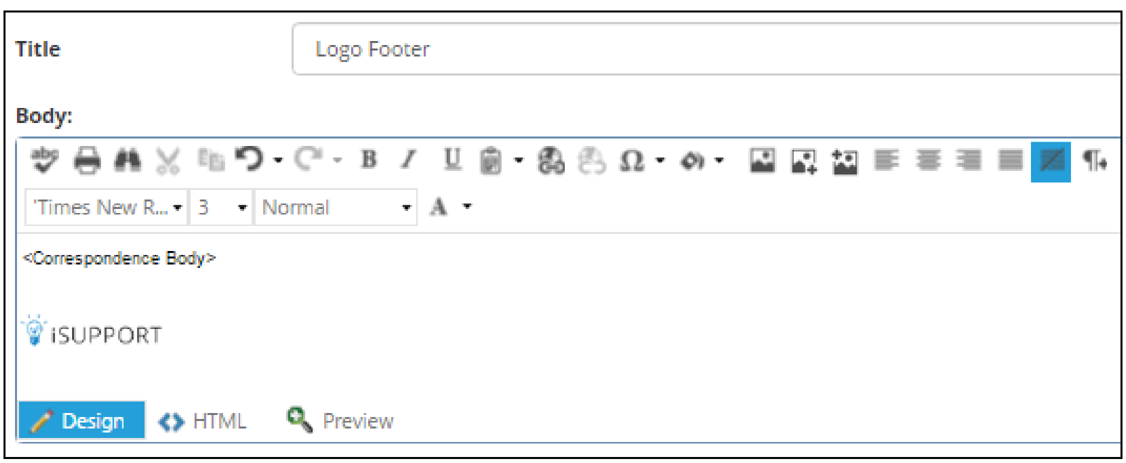
Include Attachment(s) from <record type> - For all modules except Asset, CMDB, Discussion Posts, Security, and Alerts, select this checkbox to associate any attachments from the referenced work item type to the notification when it is sent.

Attachments - Use the Attachments tab to attach a file to be sent with the notification.

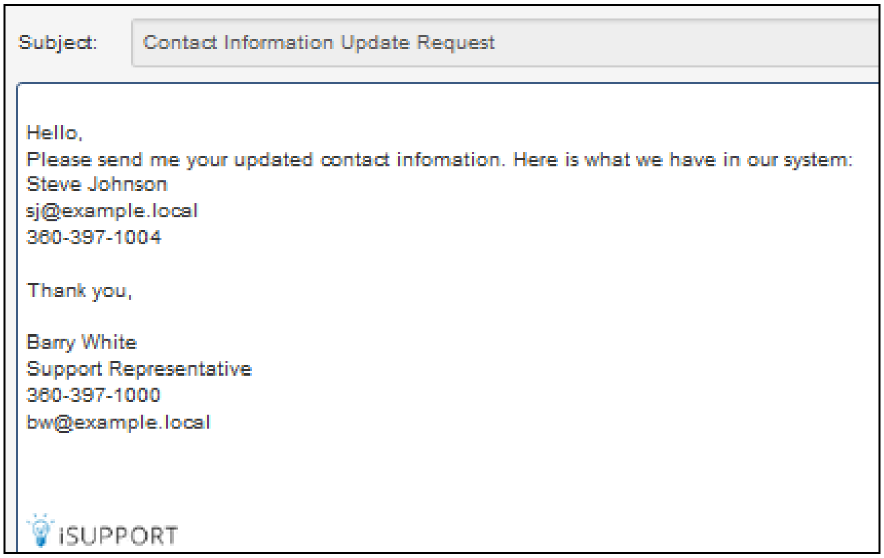
Note: If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

Configuring Design Templates

Use design templates to add common design elements such as header and footer text or images to outbound email generated from iSupport. Use the Design Templates tab in the Core Settings | Email screen to enter a title and text and images; the <Correspondence Body> tag indicates where the email data will be inserted when the design template is applied.

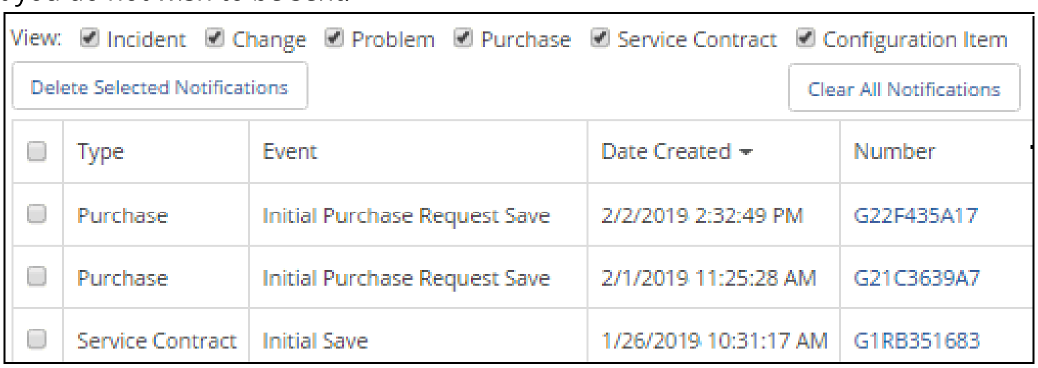


If a support representative sending a correspondence with the design template has a signature block, design elements that are after the <Correspondence Body> tag will appear after it.



Displaying the Notification Queue

Use the Notification Queue option under Options and Tools | Administer to display all notifications that have not been sent. You can use the checkboxes to restrict the notifications to appear in the screen, and delete any notifications that you do not wish to be sent.



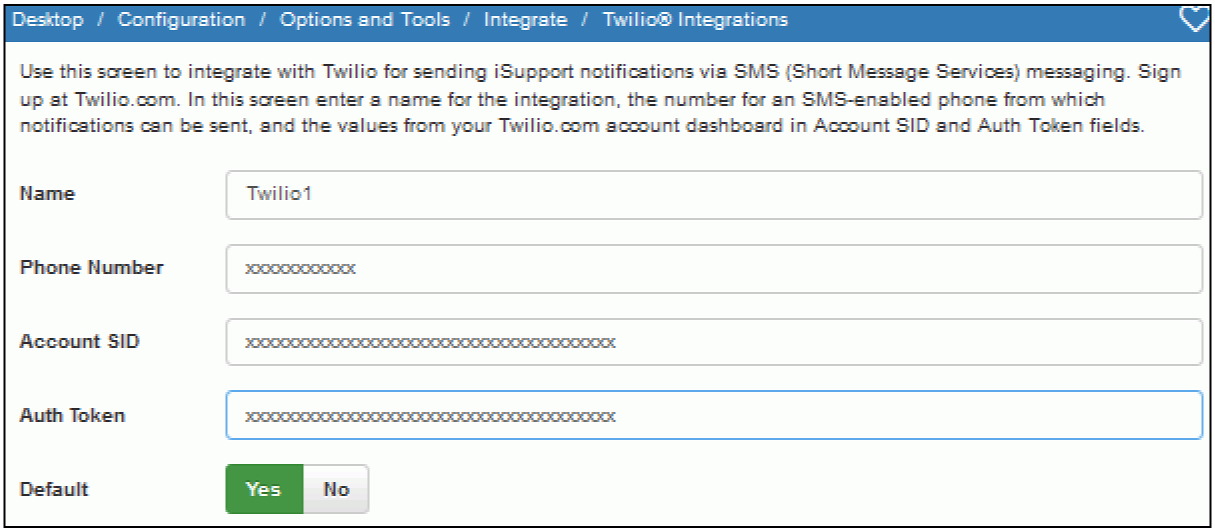
Configuring Twilio Integrations

iSupport integrates with Twilio for sending iSupport notifications to support representatives via SMS (Short Message Services) messaging. Rules with the Notify - SMS action will send the contents of the SMS Text field in the specified notification; if that field is blank or if it is a default notification, the text in the Subject field will be used.

If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, to the address in the Email field. If sending to a customer, the message will be sent to the following in their Customer Profile record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the SMS email from mySupport (email to text); if that is unavailable, the address in the Email field.

Rules can change the Twilio integration (phone number to which an iSupport SMS notification is sent) used for a work item.

After signing up at Twilio.com, use the Options and Tools | Integrate | Twilio Integrations screen to set up a number from which iSupport SMS notifications can be sent.



Name - Enter a name for the Twilio integration.

Phone Number - Enter the number for an SMS-enabled mobile phone from which iSupport SMS notifications can be sent.

Account SID - Enter the value for the Account SID from your Twilio.com account dashboard.

Auth Token - Enter the value for the Auth Token from your Twilio.com account dashboard.

Default - Select Yes to use this Twilio integration phone number for all work items that have not been assigned a Twilio integration phone number via a rule.

Configuring Change Templates

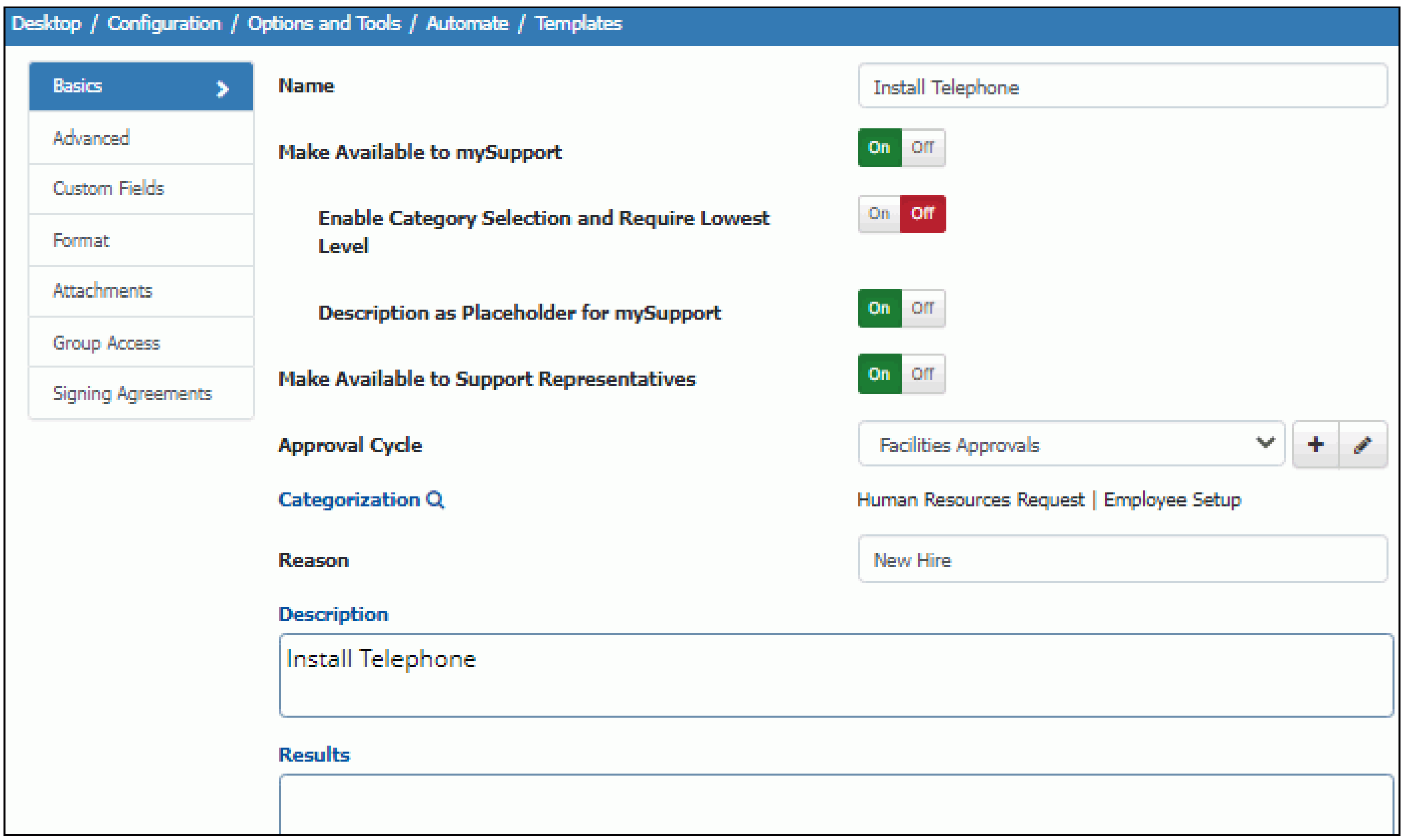
Change templates initially populate fields in Change records; use them for change requests that occur frequently.

You can assign a rule group to a template. When the template is selected in the Change screen, the rule group assigned to the template will replace any existing rule group that may be in effect (for the category or customer). When the template is selected from the mySupport portal, it takes effect based on the change creation date and time.

Note that if a template has a field that is blank, the corresponding field in the Change record will not be overwritten with a blank value.

Setting Basic Options

To get started, click the Create link in the Change Template screen.



Name - Enter a name for the change template. This name will display for selection in the Change screen.

Make Available to mySupport - Select Yes to include the template in the list of templates available for selection on the mySupport portal. You can create a link to the template using the mySupport Navigator screen.

> **Enable Category Selection and Require Lowest Level -** This field appears if Yes is selected in the Make Available to mySupport field. Select Yes to enable the category picker when the template is used on a mySupport portal. The user will be prompted to select the lowest level category if they have not already done so.

> **Description as Placeholder for mySupport** - Select On to remove the configured text in the Description field when the user clicks in the field in the Change screen on mySupport.

Make Available to Support Representatives - Select Yes to include the template in the list of templates available for selection in the Change screen. See "Restricting Access" on page 75 for information on restricting access to members of support representative groups.

Approval Cycle - If approvals are enabled, select the approval cycle to associate with the template. The rule group in effect for the change can control whether approvals are required and how approval cycles are applied.

Categorization - Click the Categorization link to select a category combination describing the change. This category combination will populate the Categorization field in the Change screen.

> **Display the Call Script for This Category Set** - This field is enabled if a script is associated with the selected category combination. Select Yes to display the script when the template is selected in the Change screen. To view the call script associated with the categorization, click the View Call Script link.

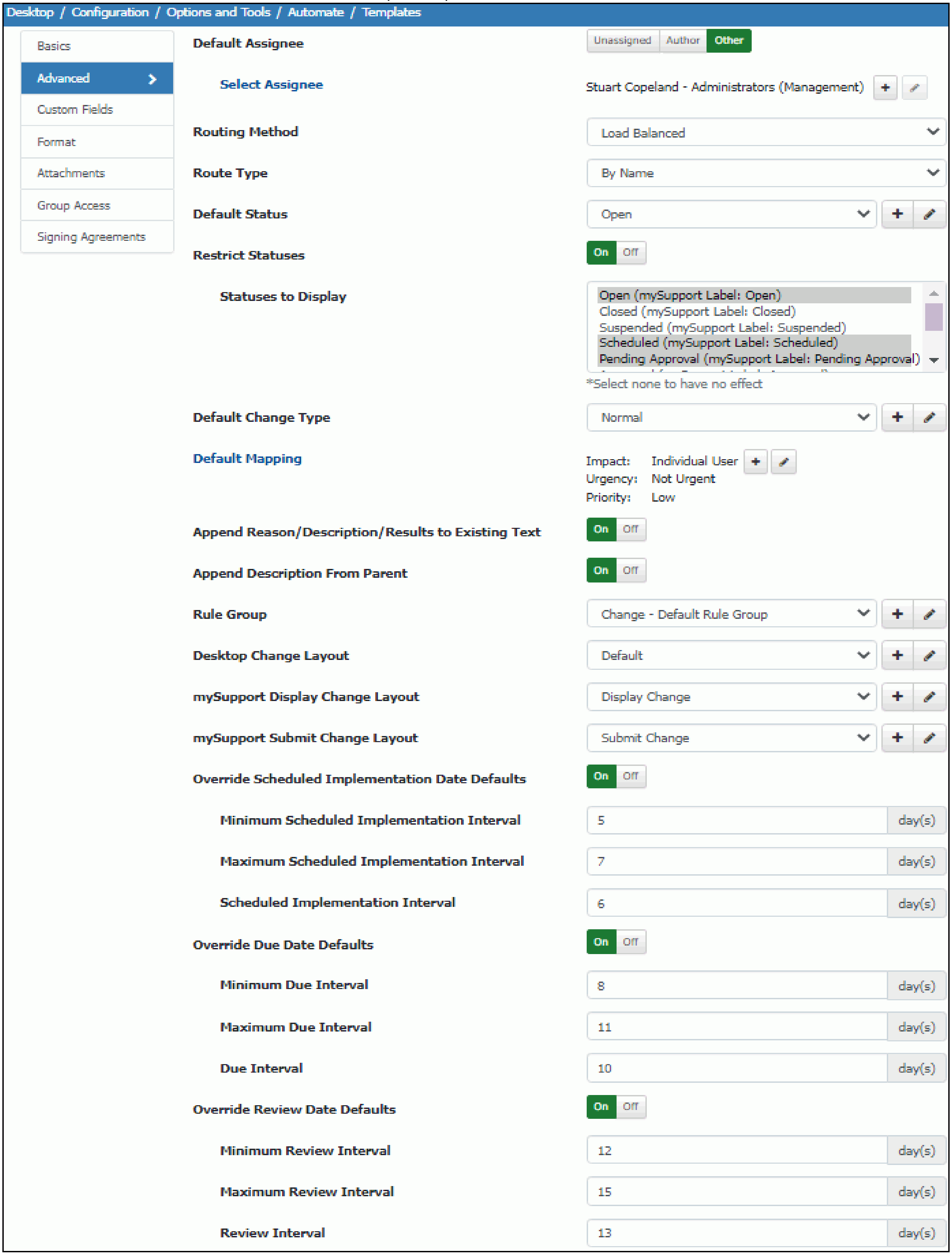
Reason - Enter the text to populate the Reason field in the Change screen.

Description - Enter the text to populate the Description field in the Change screen. If On is selected in the Description as Placeholder field, the text will disappear when the user clicks in the field in the Change screen.

Results - Enter the text to populate the Results field in the Change screen.

Setting Advanced Template Options

Use the Advanced tab to set miscellaneous template options.



Default Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field in newly-created Change records.
- Author to assign newly-created Change records to the person who created the Change record.
- Other to designate a support representative to populate the Assignee field by default in newly-created Change records. Use the + Create New and View/Edit options to access the Rep Profile screen.

Route Method - Select one of the following for assignment of changes created by the template:

- None to only assign to the support representative specified in the Default Assignee field.
- Load Balanced to select an assignee based on current open change statistics, including weights based on priority. The available support representative with the lightest overall workload will be selected.
- Round Robin to select an assignee based on the oldest date and time.

If Load Balanced or Round Robin is selected, the Route Type field will appear; select By Name to select among all available representatives, By Group to select among a specified group, By Location to select among those in a specified location, By Skill to use the categorization to select qualified support representatives, and By Location By Skill to select among those in a specified location with qualified skills. See “Enabling Routing Methods” on page 11 for more information.

If there is no support representative available for a selected method, the change will be assigned to the support representative in the Default Assignee field. If none, the change will be assigned to the support representative in the Default Change Assignee field on the Basics tab in the Change Management Basics screen.

Default Status - Select the status level to populate the Status field in the Change screen. Use the + Create New and View/Edit options to access the Custom Status Labels screen; see “Defining Custom Status Labels” on page 21 for more information.

Restrict Statuses/Statuses to Display - To designate the status labels that will be available for selection in changes created by the template, select On and then select the labels. Note: Use the Order of Precedence link in the Custom Status Labels screen to set which will prevail if both a template and a support representative group have a restricted status.

Default Change Type - Select the change type to populate the Change Type field when the template is selected in the Change screen. According to ITIL, change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.
- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

Custom labels can be defined for change types via the Change Basics screen. Use the + Create New and View/Edit options to access the Custom Change Types screen; see “Setting Up Custom Change Types” on page 19 for more information.

Default Mapping - Click this link to select the impact, urgency, and priority to populate the Impact, Urgency, and Priority fields when the template is selected in the Change screen. Use the Impact and Urgency screen to define these mappings; use the + Create New and View/Edit options to access it.

Append Reason/Description/Results to Existing Text - Select Yes to add a blank line and the text from the Reason, Description, and/or Results field to existing text when the template is applied to a saved change.

Append Description From Parent - Select On to enable the description from a parent (originating) change in a hierarchy to be appended to the description in a child incident created from it. This will also apply to child changes created via rules or when the template is applied to a change that is already part of a hierarchy. Note that if this option is set to Yes for templates on all levels of a multi-tier hierarchy, the lowest level work items could have descriptions built up from many other higher level work items.

The text entered in the work item's description via email or direct entry will be retained when the template's configured description and resolution are applied. If the Append Description/Resolution to Existing Text option is also enabled for a template, a change description would include the text from the template, the text entered via the email, rep, or mySupport customer, and the description from the parent (originating) change.

This setting will be ignored if the template is applied to a change that has no parent level change (it's not part of a hierarchy).

Rule Group - If applicable, select the rule group to apply when the template is selected in the Change screen. The rule group assigned to the template will replace any existing rule groups that may be in effect (for the category or customer). Use the + Create New and View/Edit options to access the Change Rule Group screen; see "Configuring Rules and Rule Groups for Changes" on page 48 for more information.

Desktop Change Layout - Select the layout containing the fields and tabs that will display when the template is selected for a change via the Change screen or a rule. You can use the + Create New and View/Edit options to access the Change Layouts configuration screen. Layouts can also be associated with a category, customer group, support rep group, or change template; the Order of Precedence field in the Change 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). For categories, the layout found with the lowest level 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.

mySupport Display Change Layout - Select the mySupport change display layout (configured via the mySupport Layouts screen) to apply when changes created by the template are displayed on a mySupport portal.

mySupport Submit Change Layout - Select the mySupport change submit layout (configured via the mySupport Layouts screen) to apply when the template is used on a mySupport portal.

Override Scheduled Implementation Date Defaults - Select Yes to specify minimum, maximum, and scheduled implementation date interval defaults that are different from those specified on the Important Dates tab in the Change Management Feature Basics screen.

> **Minimum Scheduled Implementation Interval** - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the calculation of the earliest date that can be selected in the Scheduled Implementation field in the Change screen.
>
> **Maximum Scheduled Implementation Interval** - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Scheduled Implementation field in the Change screen.
>
> **Scheduled Implementation Date Interval** - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Scheduled Implementation field in the Change screen. You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Scheduled Implementation date and after the Scheduled Implementation date has been exceeded.

Override Due Date Defaults - Select Yes to specify minimum, maximum, and due date interval defaults that are different from those specified on the Important Dates tab in the Change Management Feature Basics screen.

> **Minimum Due Interval** - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Due field in the Change screen.
>
> **Maximum Due Interval** - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Due field in the Change screen.
>
> **Due Date Interval** - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Due field in the Change screen. You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Due date and after the Due date has been exceeded.

Override Review Date Defaults - Select Yes to specify minimum, maximum, and review date interval defaults that are different from those specified on the Important Dates tab in the Change Management Feature Basics screen.

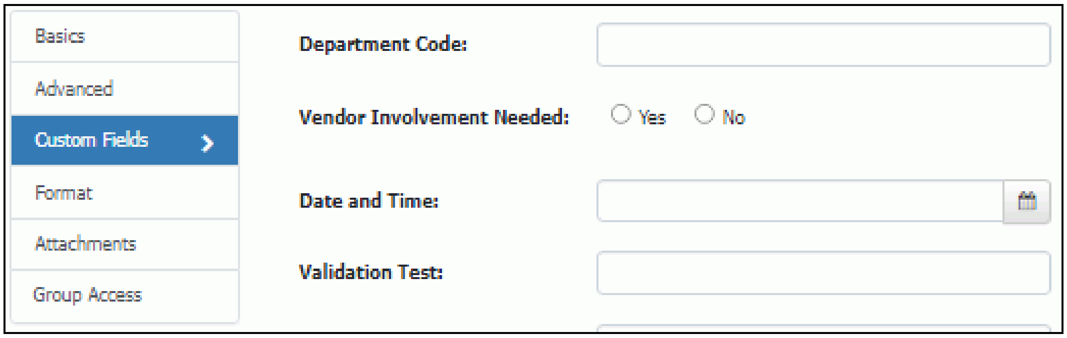
> **Minimum Review Interval** - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Review field in the Change screen.

Maximum Review Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Review field in the Change screen.

Review Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Review field in the Change screen. You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Review date and after the Review date has been exceeded.

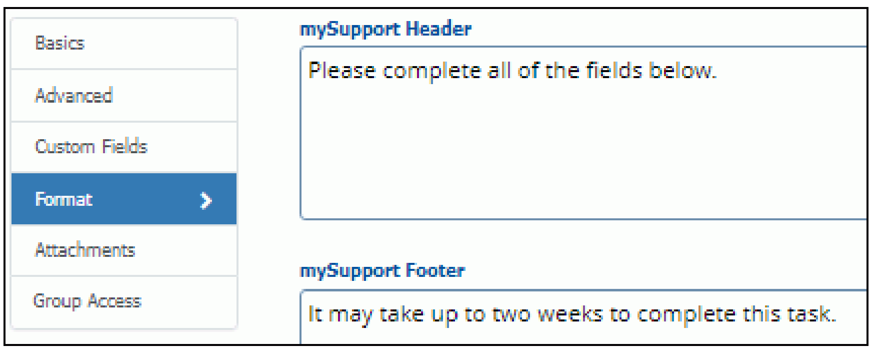
Configuring Custom Fields

The third tab contains custom fields configured via the Custom Fields screen; select the values to populate custom fields by default in changes created by the template.



Formatting the mySupport Change Template Submit Screen

Use the Format tab to add formatted text and images to appear at the top (header) and bottom (footer) of the mySupport Change Template Submit screen.

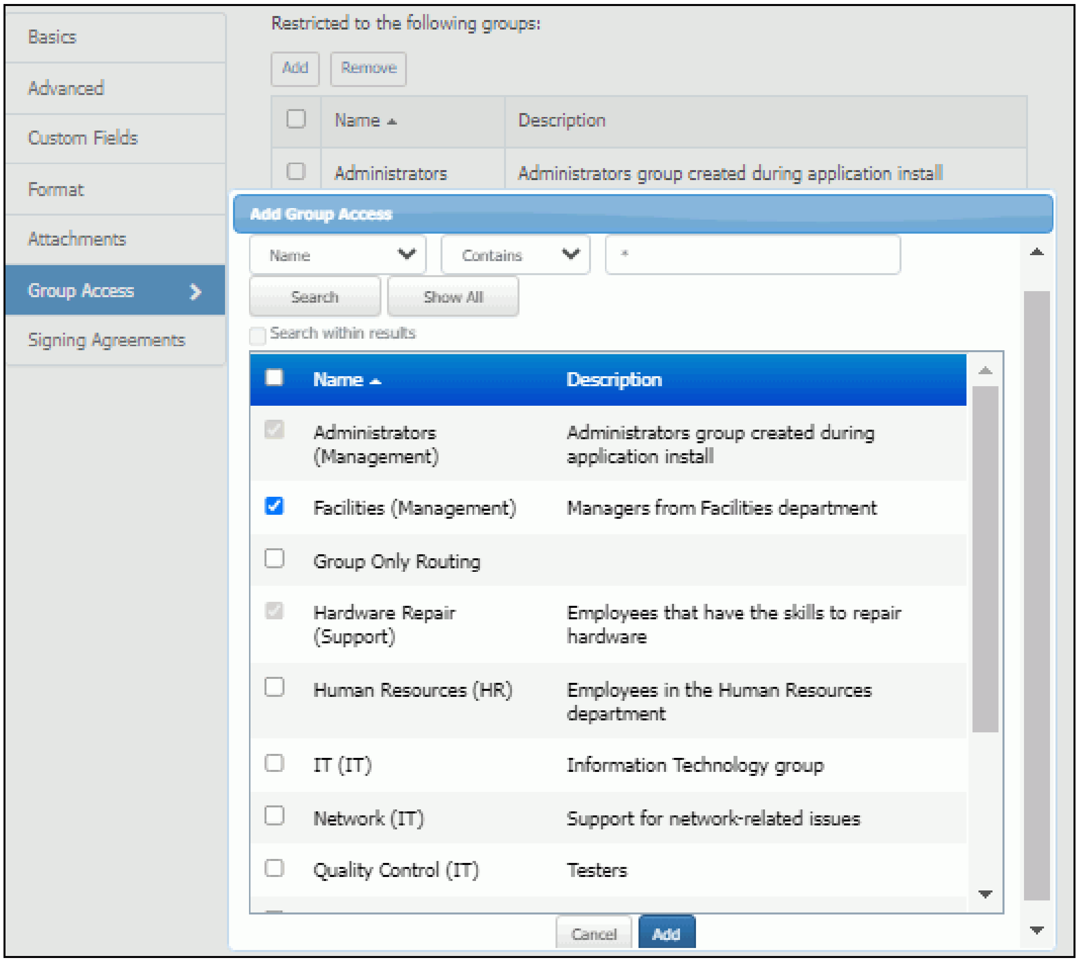


Attaching Files

Use the Attachments tab to attach any files to the template.

Restricting Access

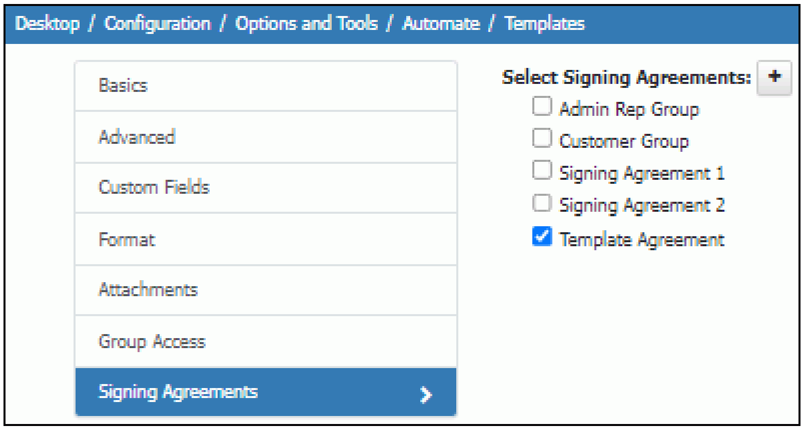
Use the Group Access tab to restrict display of the template to members of support representative groups. Click the Add link to display the following dialog for selecting the groups. ***After you add one or more groups and save, the template will display only to members of the selected groups.***



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 template. Use the plus sign icon to create an agreement via the Signing Agreements configuration screen.



Configuring Change Hierarchy Templates for Workflow Tasks

Use hierarchy templates to track and manage issues or tasks that have multiple activities. Existing change functionality such as escalation and routing apply to changes created from hierarchy templates.

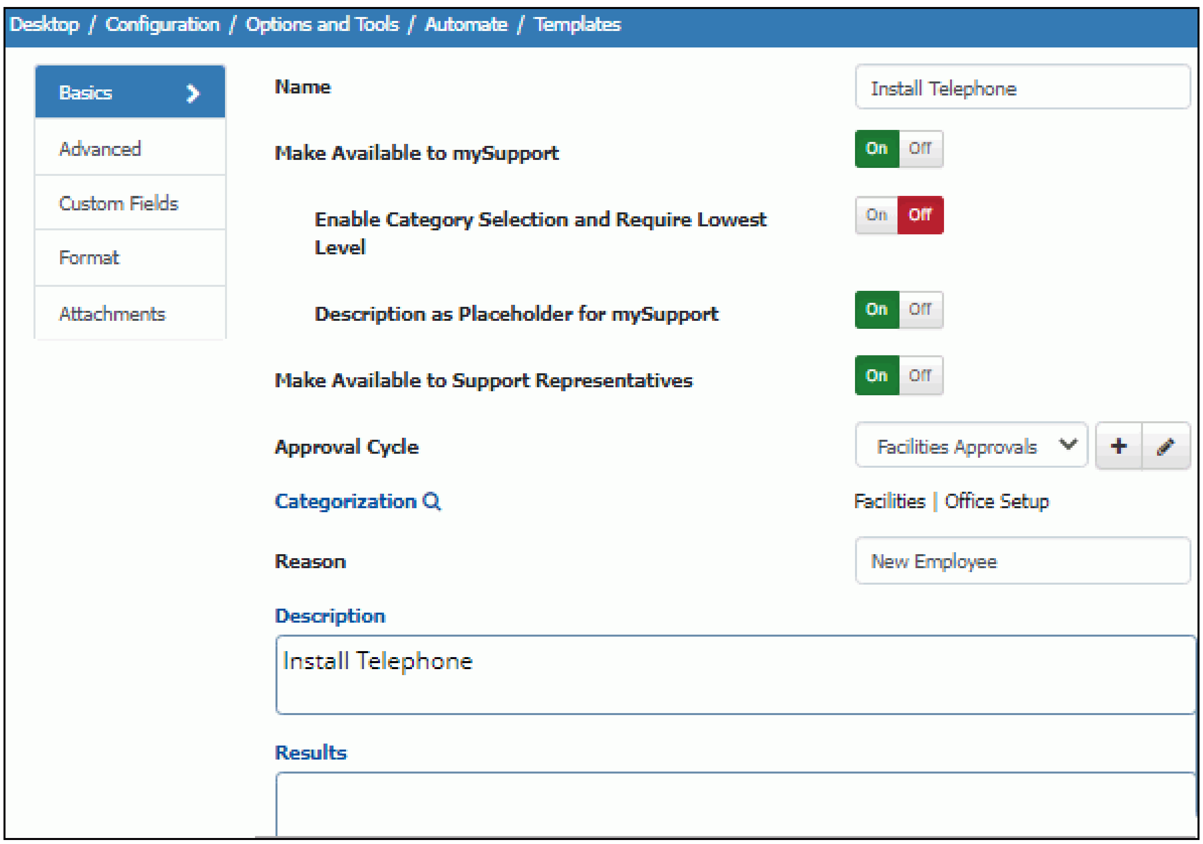
Hierarchy templates are especially useful for accountability purposes if there is more than one person involved in a set of tasks; for example, you could create a hierarchy template for installing a telephone with someone in Maintenance as the default assignee, and create a template for assigning a telephone number with someone in the Systems department as the default assignee.

In the example above, when the Install Telephone template is selected in the Change screen, a change is created from the Install Telephone template as well as the Assign Telephone Number template.

See “Creating a Lower Level Template” on page 83 for information on creating a multiple-level template hierarchy.

Creating a Top Level Template

To get started, complete the following fields on the Change Hierarchy tab in the Options and Tools | Automate | Templates screen.



Name - Enter a name for the hierarchy template. This name will display for selection in the Change screen.

Make Available to mySupport - This field is only available on a top-level hierarchy template. Select Yes to allow the template to be used on the mySupport portal. You can create a link to the template using the mySupport Navigator screen.

Make Available to Support Representatives - This field is only available on a top-level hierarchy template. Select Yes to include the template in the list of templates for selection in the Change screen. See “Restricting Access” on page 83 for information on restricting access to members of support representative groups.

Approval Cycle - If approvals are enabled, select the approval cycle to associate with the template. The rule group in effect for the change can control whether approvals are required and how approval cycles are applied.

Categorization - Click the Categorization link to select a category combination describing the task. This category combination will populate the Categorization field in the Change screen.

> **Enable Category Selection and Require Lowest Level** - This field appears if Yes is selected in the Make Available to mySupport field. Select Yes to enable the category picker when the template is used on a mySupport portal. The user will be prompted to select the lowest level category if they have not already done so.
>
> **Description as Placeholder for mySupport** - Select On to remove the configured text in the Description field when the user clicks in the field in the Change screen on mySupport.

Display the Call Script for This Category Set - This field is enabled if a script is associated with the selected category combination. Select Yes to display the script when the template is selected in the Change screen. To view the call script associated with the categorization, click the View Call Script link.

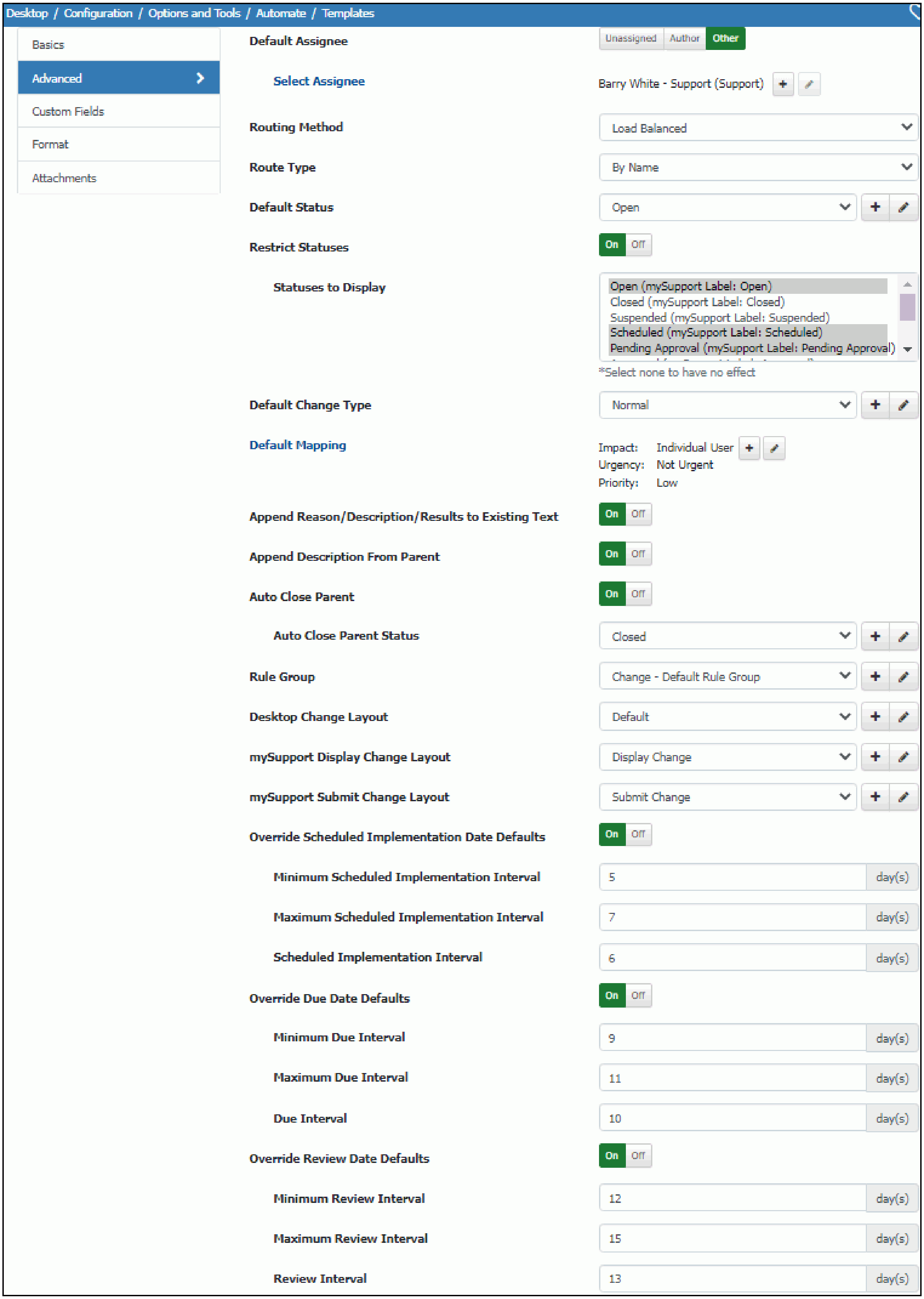
Reason - Enter the text to populate the Reason field in the Change screen.

Description as Placeholder - Select On to remove the configured text in the Description field when the user clicks in the field in the Change screen.

Description - Enter the text to populate the Description field in the Change screen.

Results - Enter the text to populate the Results field in the Change screen.

Use the Advanced tab to set miscellaneous template options and enter defaults.



Default Assignee/Select Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field in Change records created using the template.
- Author to populate the Assignee field by default with the support representative using the template.
- Other to designate a support representative to populate the Assignee field by default in Change records created using the template. Use the + Create New and View/Edit options to access the Rep Profile screen.

Route Method - Select one of the following for assignment of changes created by the template:

- None to only assign to the support representative specified in the Default Assignee field.
- Load Balanced to select an assignee based on current open change statistics, including weights based on priority. The available support representative with the lightest overall workload will be selected.
- Round Robin to select an assignee based on the oldest date and time.

If Load Balanced or Round Robin is selected, the Route Type field will appear; select By Name to select among all available representatives, By Group to select among a specified group, By Location to select among those in a specified location, By Skill to use the categorization to select qualified support representatives, and By Location By Skill to select among those in a specified location with qualified skills. See "Enabling Routing Methods" on page 11 for more information.

If there is no support representative available for a selected method, the change will be assigned to the support representative in the Default Assignee field. If none, the change will be assigned to the support representative in the Default Change Assignee field on the Basics tab in the Change Management Basics screen.

Default Status - Select the status level to populate the Status field in the Change screen. Use the + Create New and View/Edit options to access the Custom Status Labels screen.

Restrict Statuses/Statuses to Display - To designate the status labels that will be available for selection in changes created by the template, select On and then select the labels. Note: Use the Order of Precedence link in the Custom Status Labels screen to set which will prevail if both a template and a support representative group have a restricted status.

Default Change Type - Select the change type to populate the Change Type field when the template is selected in the Change screen. According to ITIL, change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.
- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

Custom labels can be defined for change types via the Change Basics screen. Use the + Create New and View/Edit options to access the Custom Change Types screen; see "Setting Up Custom Change Types" on page 19 for more information.

Default Mapping - Click this link to select the Impact, Urgency, and Priority to populate the Impact, Urgency, and Priority fields in the Change screen. These mappings are defined in the Impact and Urgency screen. Use the + Create New and View/Edit options to access the Impact and Urgency screen.

Append Reason/Description/Results to Existing Text - Select Yes to add a blank line and the text from the Reason, Description, and/or Results field to existing text when the template is applied to a saved change.

Append Description From Parent - Select Yes to enable the description from a parent (originating) change in a hierarchy to be appended to the description in a child incident created from it. This will also apply to child changes created via rules or when the template is applied to a change that is already part of a hierarchy. Note that if this option is set to Yes for templates on all levels of a multi-tier hierarchy, the lowest level work items could have descriptions built up from many other higher level work items.

The text entered in the work item's description via email or direct entry will be retained when the template's configured description and resolution are applied. If the Append Description/Resolution to Existing Text option is also enabled for a template, a change description would include the text from the template, the text entered via the email, rep, or mySupport customer, and the description from the parent (originating) change.

This setting will be ignored if the template is applied to a change that has no parent level change (it's not part of a hierarchy).

Auto Close Parent - Select Yes to automatically close the top level work item if all lower level work items in the hierarchy are closed.

Auto Close Parent Status - If automatically closing a top level work item when all lower level work items in the hierarchy are closed, select or create a Closed status label to assign to the top level change that is automatically closed. Use the + Create New and View/Edit options to access the Custom Status Labels screen; see "Defining Custom Status Labels" on page 21 for more information.

Rule Group - If applicable, select the rule group to apply when the template is selected in the Change screen. The rule group assigned to the template will replace any existing rule groups that may be in effect (for the category or customer). Use the + Create New and View/Edit options to access the Change Rule Group screen; see "Configuring Rules and Rule Groups for Changes" on page 48 for more information.

Override Scheduled Implementation Date Defaults - Select Yes to specify minimum, maximum, and scheduled implementation date interval defaults that are different from those specified on the Advanced tab in the Change Management Feature Basics screen.

Minimum Scheduled Implementation Interval - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Scheduled Implementation field in the Change screen.

Maximum Scheduled Implementation Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Scheduled Implementation field in the Change screen.

Scheduled Implementation Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Scheduled Implementation field in the Change screen. You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Scheduled Implementation date and after the Scheduled Implementation date has been exceeded.

Override Due Date Defaults - Select Yes to specify minimum, maximum, and due date interval defaults that are different from those specified on the Advanced tab in the Change Management Feature Basics screen.

Minimum Due Interval - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Due field in the Change screen.

Maximum Due Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Due field in the Change screen.

Due Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Due field in the Change screen. You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Due date and after the Due date has been exceeded.

Override Review Date Defaults - Select Yes to specify minimum, maximum, and review date interval defaults that are different from those specified on the Advanced tab in the Change Management Feature Basics screen.

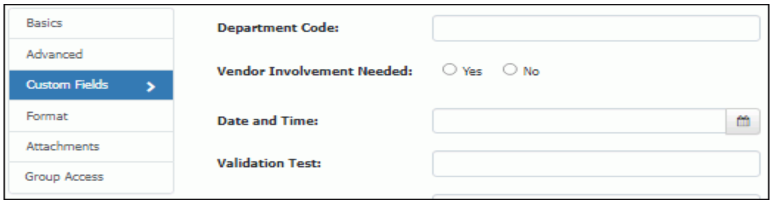
Minimum Review Interval - Enter the lowest number of days (after the Change record open date) to be used in the calculation of the earliest date that can be selected in the Review field in the Change screen.

Maximum Review Interval - Enter the highest number of days (after the Change record open date) to be used in the calculation of the latest date that can be selected in the Review field in the Change screen.

Review Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Review field in the Change screen. You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Review date and after the Review date has been exceeded.

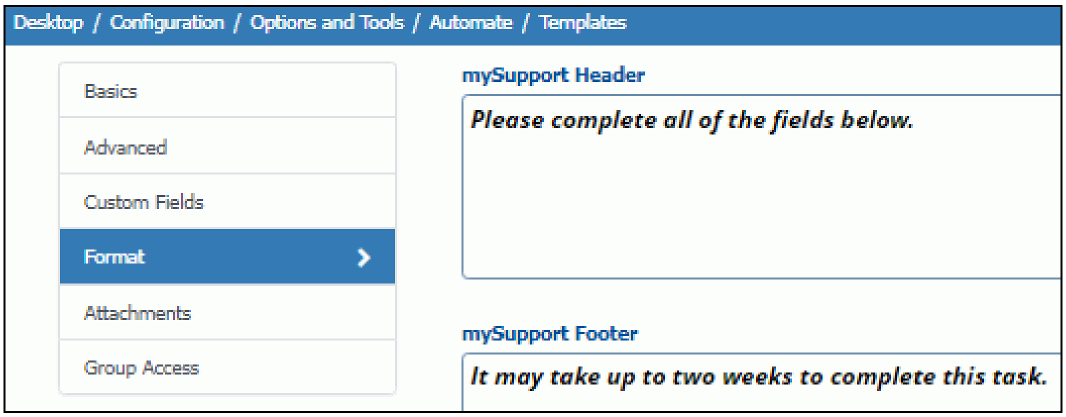
Configuring Custom Fields

The third tab contains custom fields configured via the Custom Fields screen; select the values to populate custom fields by default in changes created by the template.



Formatting the mySupport Change Hierarchy Template Submit Screen

Use the Format tab to add formatted text and images to appear at the top (header) and bottom (footer) of the mySupport Change Hierarchy Template Submit screen.

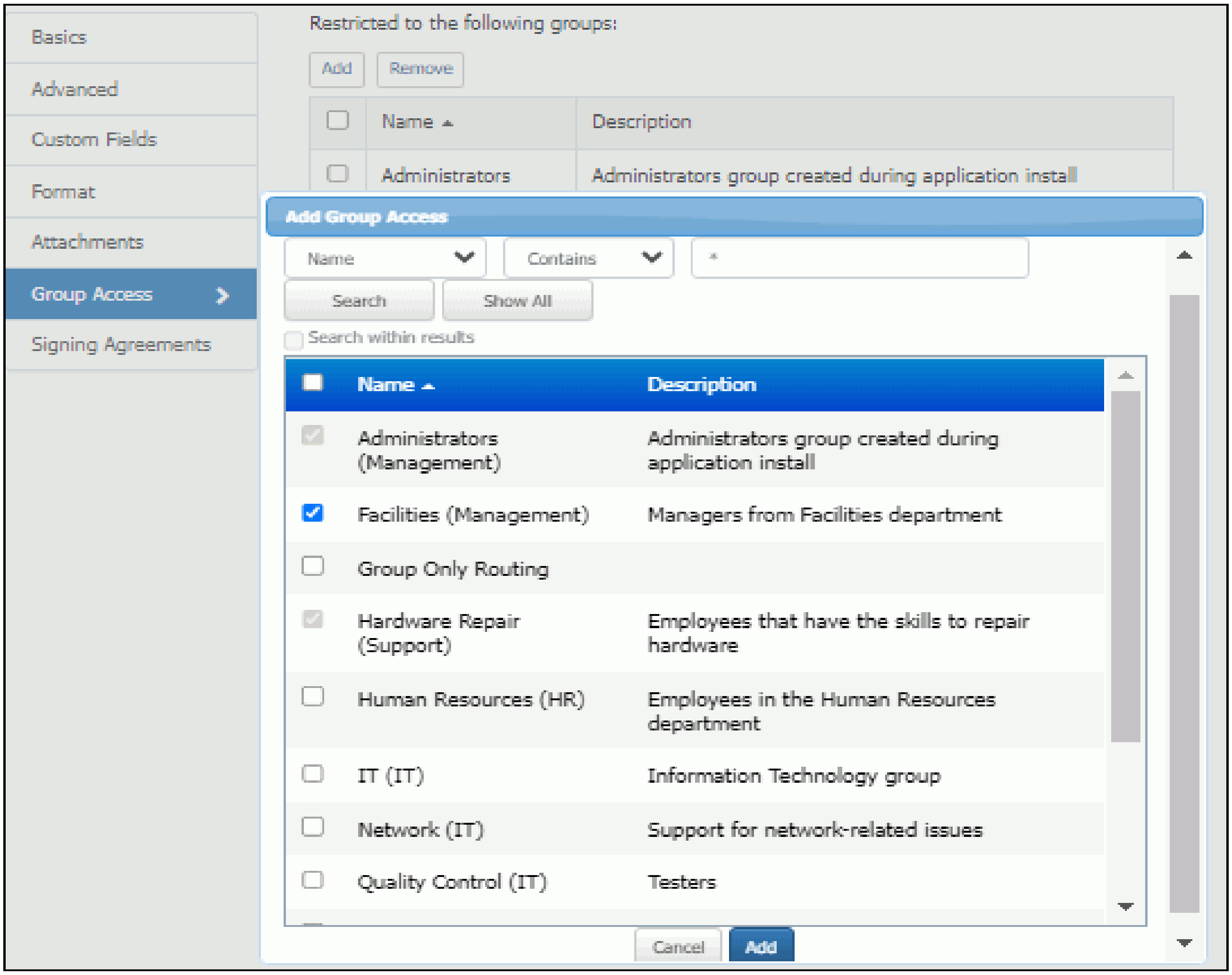


Attaching Files

Use the Attachments tab to attach any files to the template.

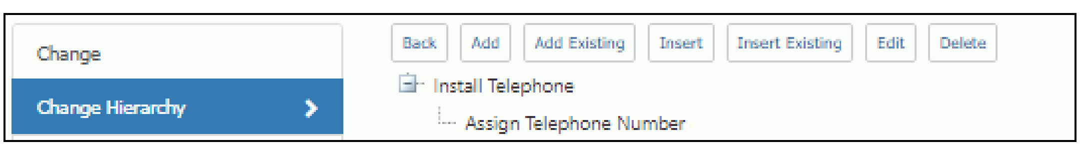
Restricting Access

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

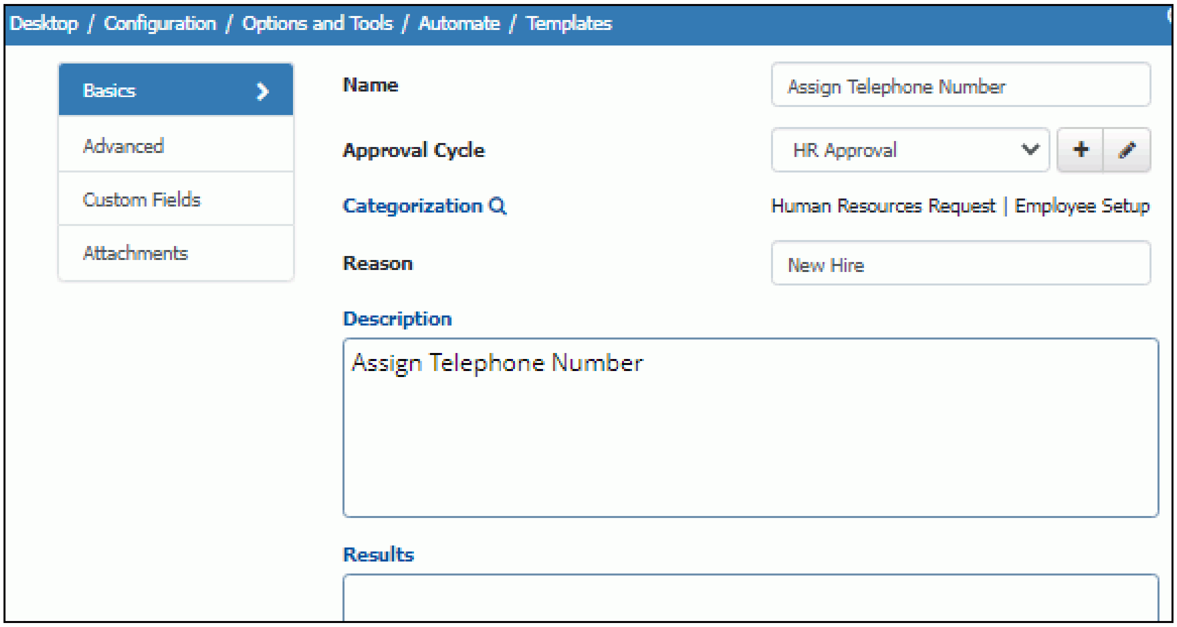


Creating a Lower Level Template

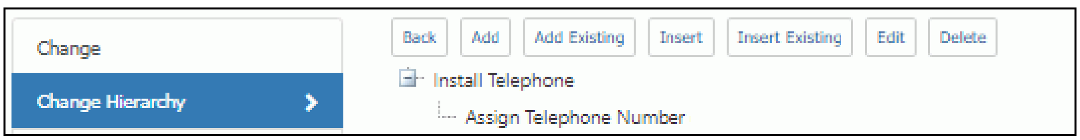
After you create and save a template, the following links appear when you select it in the View Hierarchy Templates screen:



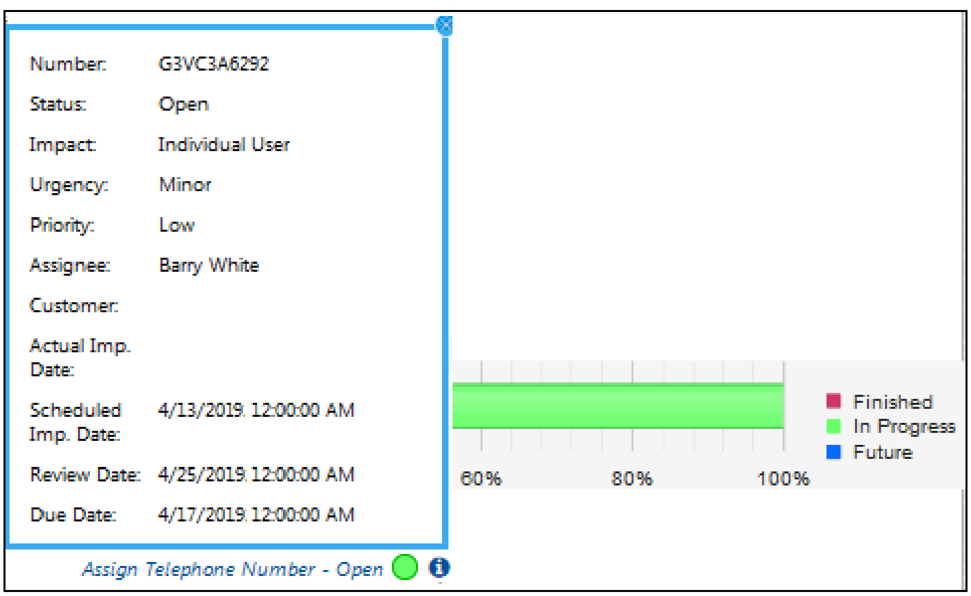
To create a template that will be one level below an existing template, select the existing template and click the Add link. On a lower-level template, the Basics tab does not contain the Make Available to mySupport and Make Available to Support Representatives fields because only top-level templates are available for selection in the mySupport portal and Change screens.



When you add a lower level template to a top-level template, the lower level template is indented in the Hierarchy Templates Configuration screen.

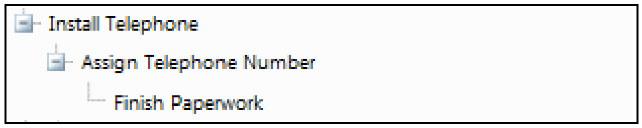


When the hierarchy template is selected in the Change screen, use either the Related Hierarchy field (if configured) or the View Related option (which displays a dialog as shown below) to display the changes created by the template hierarchy. A Click for Details option appears next to each open and closed change for displaying change details.

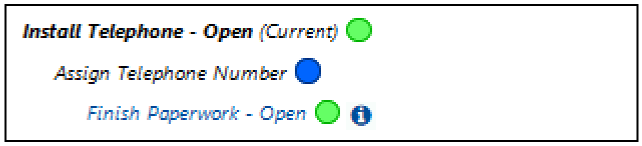


Adding a Third Level Template

When a third level template is added to the hierarchy, a dependency is created. A change will not be automatically created from the middle-level template until the change created from the template below it is closed. In the following example, when the Install Telephone template is selected in the Change screen, it is applied to the current change and a change is created with the Finish Paperwork template. A change will be created with the Assign Telephone Number template when the Finish Paperwork change is closed.

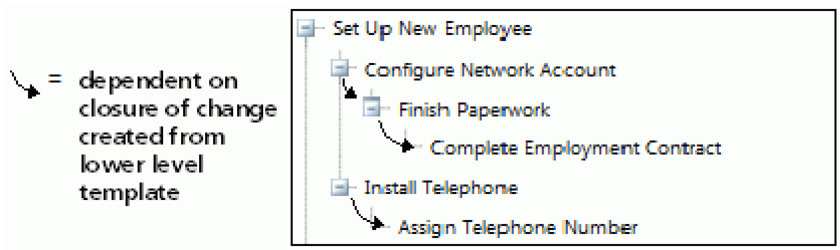


This is shown in the hierarchy in the Change screen when you click the Related Hierarchy link to view the hierarchy.

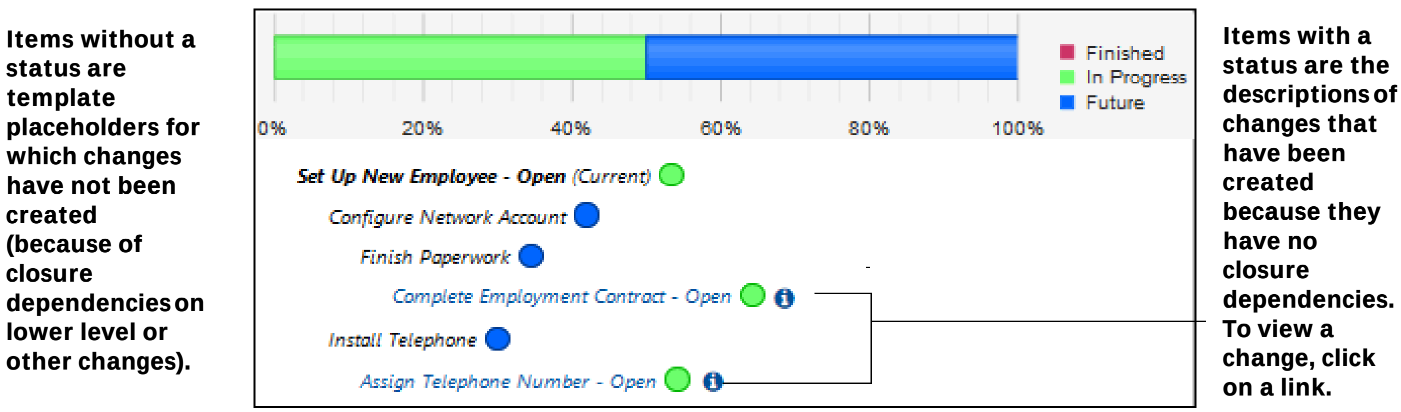


In iSupport, template components that have not created changes due to dependencies are called *placeholders*.

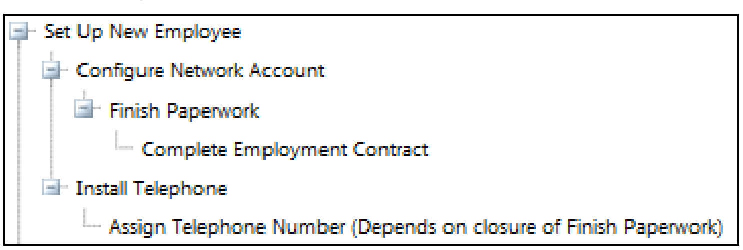
Dependencies are created as you add more levels. In the example below, a change created from the Complete Employment Contract template must be closed before a change will be created from the Finish Paperwork template.



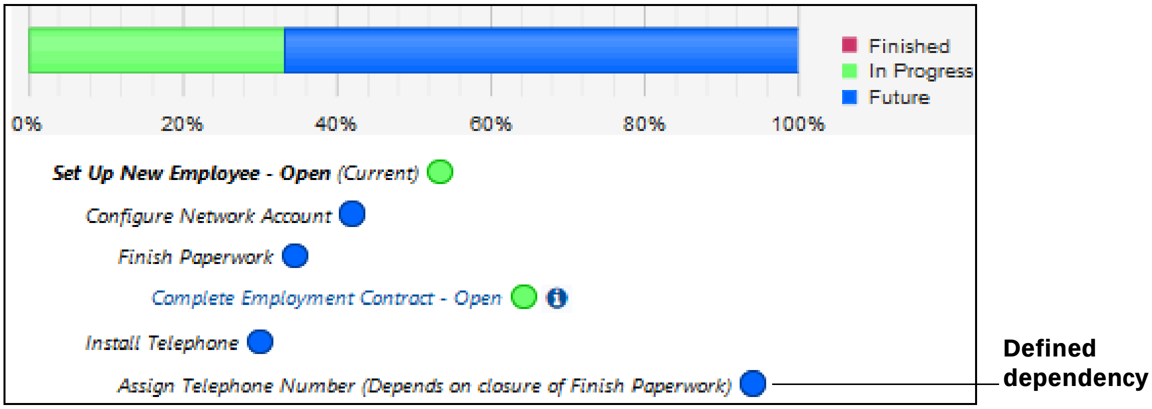
This is shown in the Change screen when you view the hierarchy.



In addition to the dependency created when you add or insert a template, you can define a dependency on a template that is not on a level directly below the specified template. In the following example, a dependency can be defined for the Assign Telephone Number template so that a change will not be created from it until a change created from the Finish Paperwork template is closed.



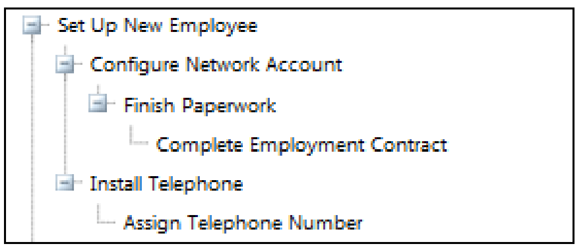
The defined dependency is shown in the Change screen when you view the hierarchy.



For information on defining the separate dependency, see "Defining Dependencies On Other Templates" on page 86.

Building a Workflow Hierarchy

You can use the Add, Add Existing, Insert, and Insert Existing links to create larger hierarchies as shown in the example below. It is useful to chart your template structure using a white board to ensure that it is logical and complete.

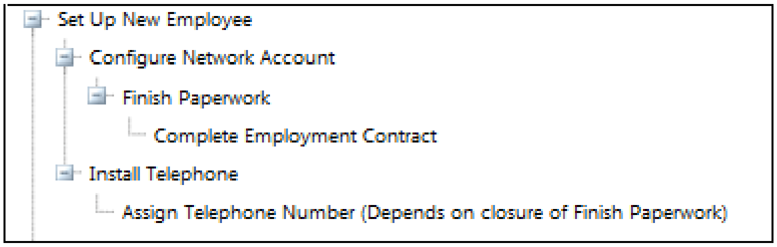


You would use the following steps to create the workflow:

1. Use the New link to create and save the Set Up New Employee template.
2. Select the Set Up New Employee template and click the Add link. Create and save the Configure Network Account template.
3. Select the Configure Network Account template and click the Add link.
4. Create and save the Finish Paperwork template.
5. Select the Finish Paperwork template and click the Add link.
6. Create and save the Complete Employment Contract template.
7. Select the Set Up New Employee template and click the Add link. Create and save the Install Telephone template.
8. Select the Install Telephone template and click the Add link.
9. Create and save the Assign Telephone Number template.

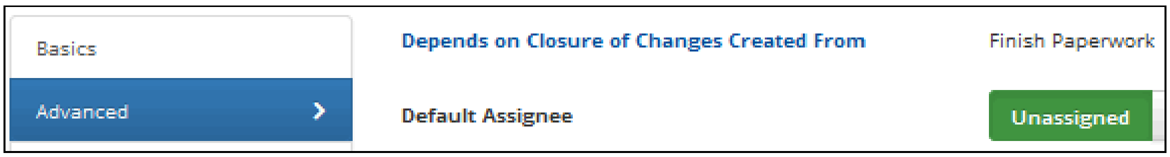
Defining Dependencies On Other Templates

In addition to the dependency created when you add or insert a template, you can define a dependency on a template that is not on a level directly below the specified template. In the following example, a dependency can be defined for the Assign Telephone Number template so that a change will not be created from it until a change created from the Finish Paperwork template is closed.



To define this type of dependency, you would first select the template (Assign Telephone Number in this example) and click the Edit link.

In the Hierarchy Template screen, click the Depends on Closure of Changes Created From link on the Advanced tab and select the template from which a change must be closed before a change will be created from current template. Continuing with the example, you would select the Finish Paperwork template.



Note: When you use the Edit link to change a template, the change will not be reflected in any other hierarchies that use the template. Changes already created from the template are not affected; however, future changes created from the template will reflect the change.

Adding Existing Templates

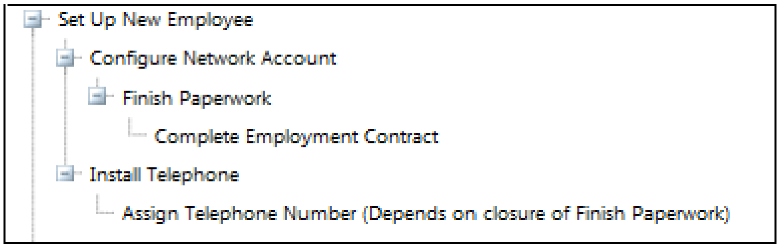
When you use the Add Existing link to add an existing template to a hierarchy, a copy of the existing template is placed a level *under* the selected template and changes can be made if necessary. If the template that is copied includes lower level templates, those templates are also copied.

Inserting Templates Into a Hierarchy

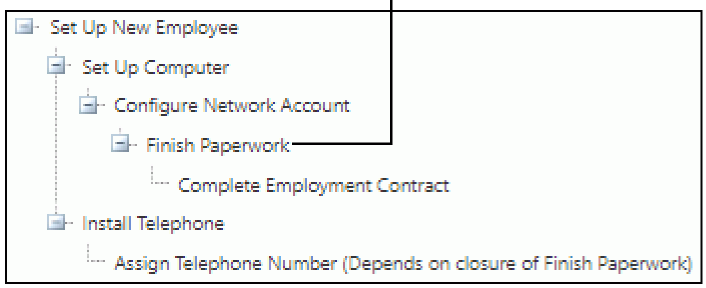
Once you have created a workflow hierarchy, you can use the Insert and Insert Existing links to insert a copy of a template into it. The inserted template will be placed *above* (as a parent to) the selected template, pushing the selected template down a level. If the template to be inserted includes lower level templates, those templates are also copied.

In the example below, if you were to select the Configure Network Account template, click the Insert link, and create and save a template, the template hierarchy would look like the following.

Before

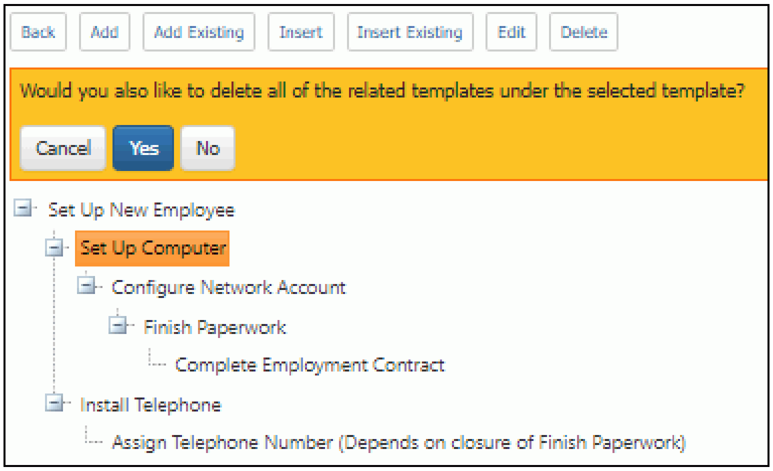


After selecting the Configure Network Account template and inserting Set Up New Computer template, the Configure Network Account template becomes a level lower than the inserted template.

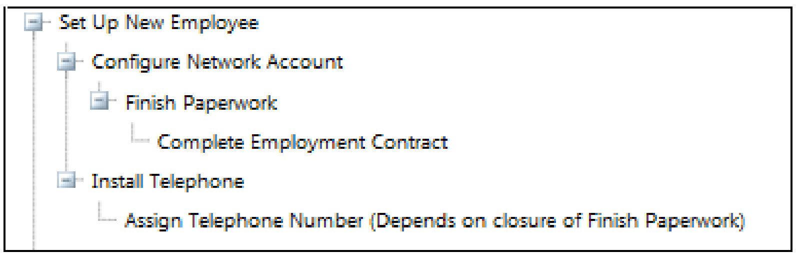


Deleting Templates in a Hierarchy

If you need to delete a template that has lower level templates, you can choose to delete the lower level templates or move them under the upper level of the template to be deleted. In the example below, if you select the Set Up New Computer template and select Delete, the following prompt will appear after a verification prompt:



If you answer No, the lower level template (Configure Network Account in the example below) will move up one level in the hierarchy, becoming a lower level of the Set Up New Employee template.



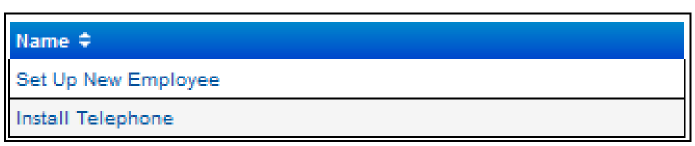
If you delete a top level template, the next level of templates below it will each become top-level templates. Any templates below those will retain their lower level templates.

If you delete a template with no lower level templates, the template will be deleted after a confirmation message. If you delete a template that has been used to create changes, the template will not be deleted until the associated changes have been closed and archived or deleted and removed via the Database Maintenance agent.

Note: There is no limit to the number of templates in a hierarchy.

Using Hierarchy Templates in the Change Screen

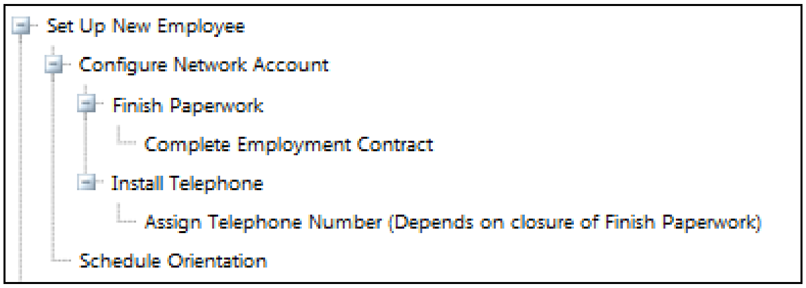
To use a hierarchy template in the Change screen, select Change | Templates | Use Hierarchy Template.



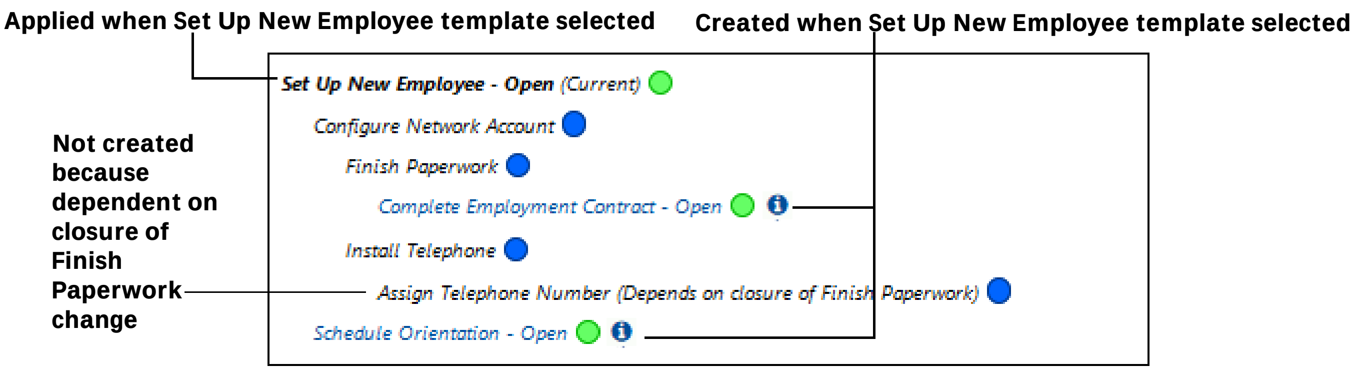
Only top-level templates appear for selection in the Change screen and on the mySupport portal (if configured to be available to support representatives and customers).

When a hierarchy template is selected for a change, the template structure is copied to the Change record. The top-level template is applied to the change and Change records are created for any templates without lower-level templates or other dependencies. If a template contains a dependency, a change is *not* created from it until the dependent changes are closed.

Template Hierarchy



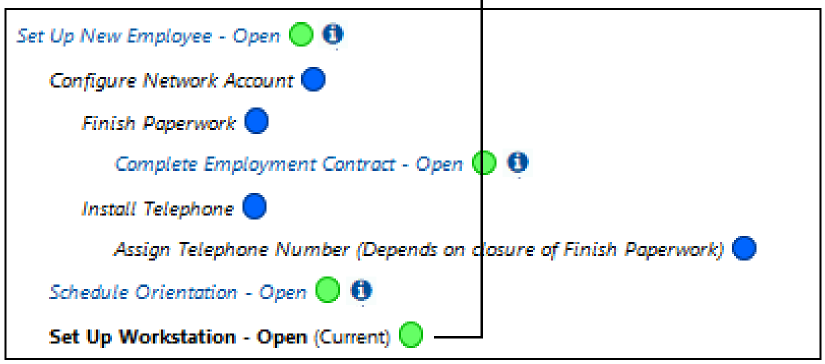
When Template is Selected in Change Screen



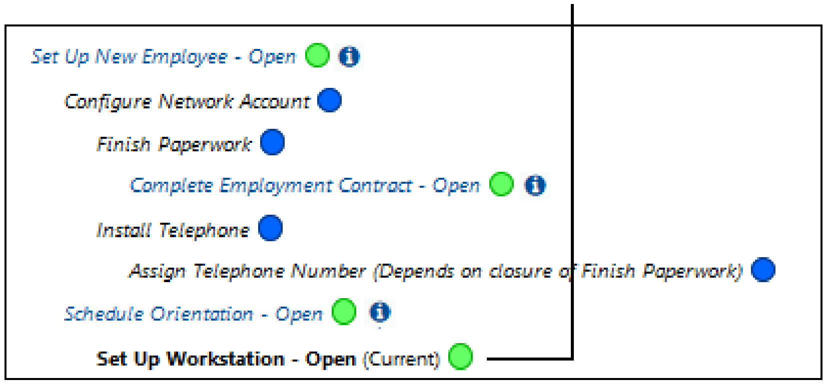
Adding Changes to a Template Hierarchy

To add a change or a change and its hierarchy to a change in a hierarchy template structure, you can select New | Related Change or use the Add options under Change | Hierarchy to add an existing change.

Added to Set Up New Employee top level change



Added to Schedule Orientation lower level change

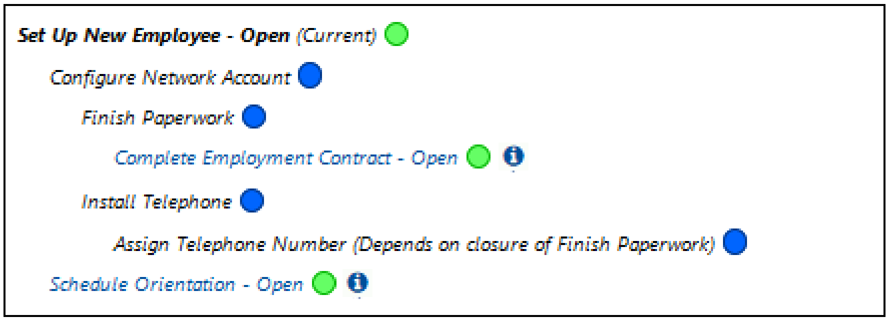


If the added existing change contains lower level changes, the structure is also added.

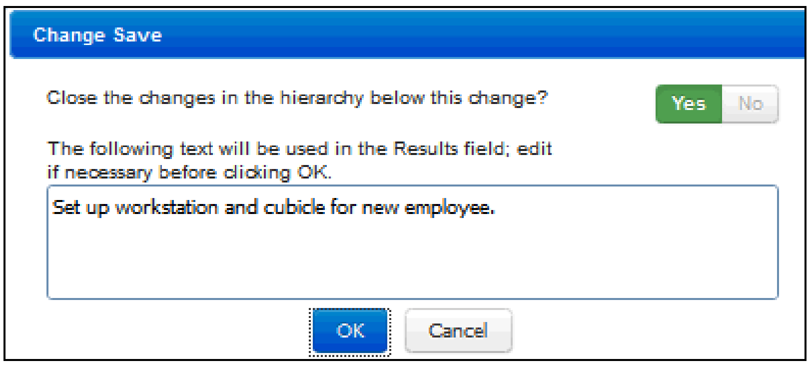
Closing Changes in a Hierarchy Template Structure

Closing a Top Level Change in a Hierarchy Template

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

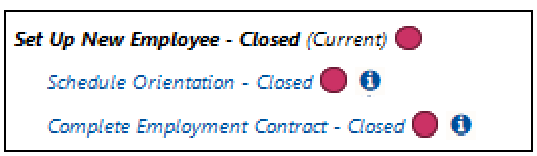


In the Set Up New Employee change, the following dialog appears when you enter results, select a closed status, and save the change:



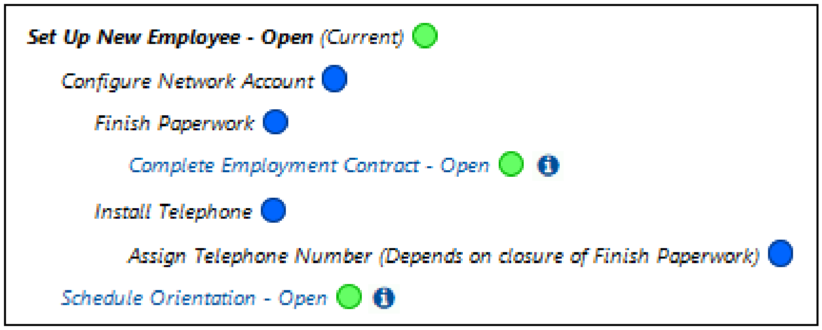
Use this dialog to change the results that will be applied to the open lower level changes before closure. If you select Cancel in this dialog, the top level change will remain open.

If you select OK, the hierarchy is as follows:

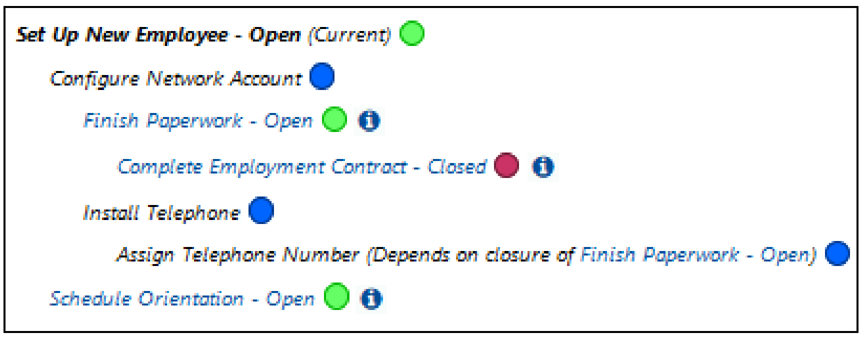


Closing Lower Level Changes in a Hierarchy

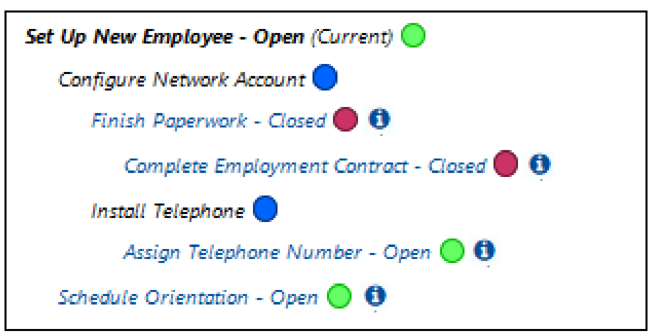
When a lower level change in a hierarchy template is closed, changes are created from templates that were dependent on closure of that change. In the following example, after the Complete Employment Contract change is closed, the Finish Paperwork change is created.



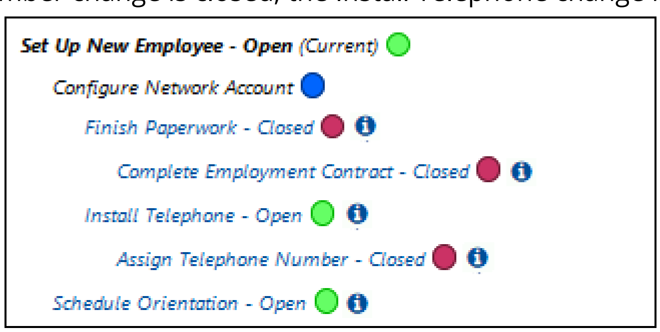
After Complete Employment Contract change closed



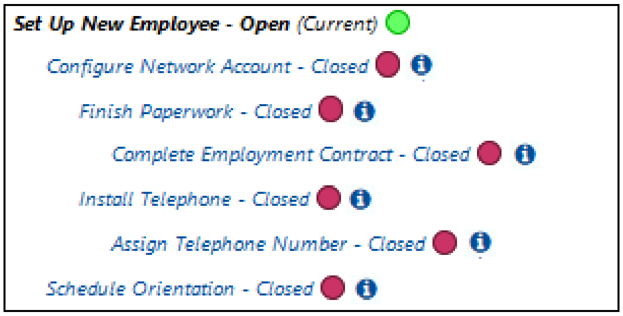
When the Finish Paperwork change is closed, a change will be created from the Configure Network Account template. A change will also be created from the Assign Telephone Number template because the change on which it was dependent is closed.



When the Assign Telephone Number change is closed, the Install Telephone change is created.



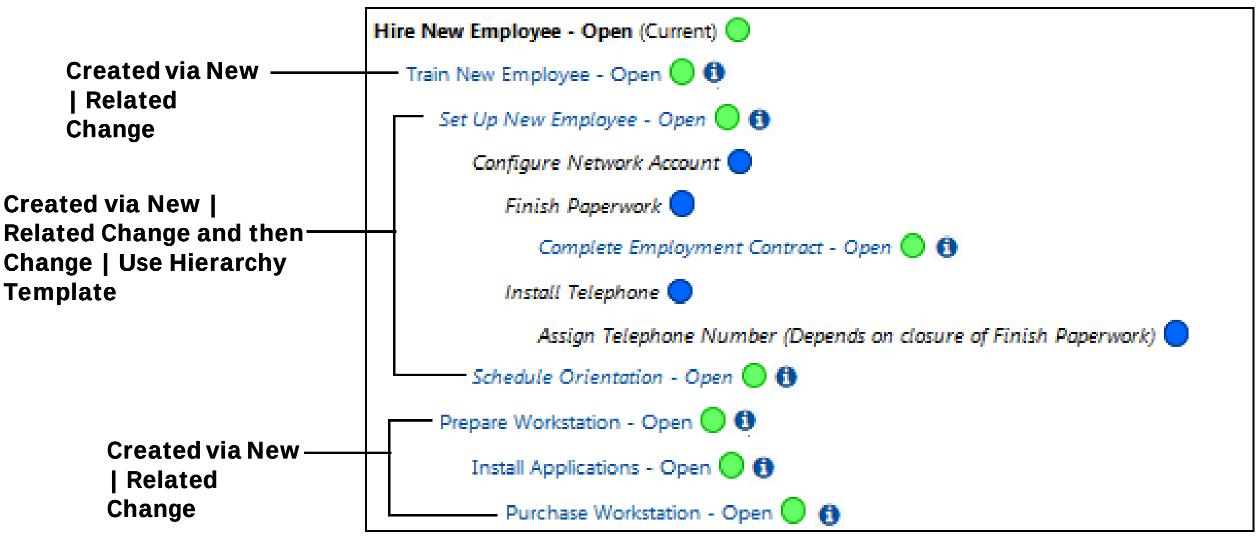
When the Schedule Orientation, Install Telephone, and Configure Network Account changes are closed, the Setup New Employee change can be closed.



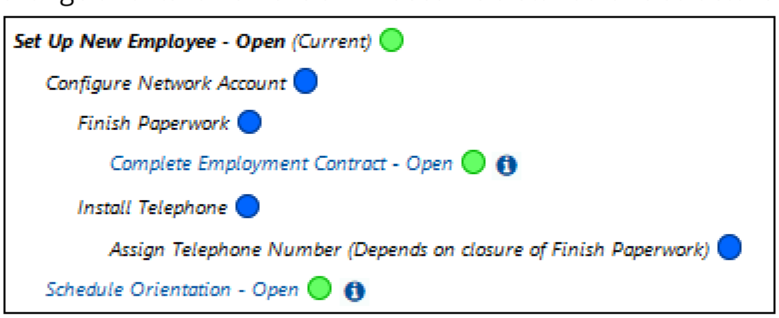
A configuration option can be set (on the Advanced tab in the Hierarchy Template screen) for a top level template to automatically close the top level change in a hierarchy if all lower level changes in the hierarchy are closed.

Removing and Deleting a Top Level Change in a Hierarchy Template Structure

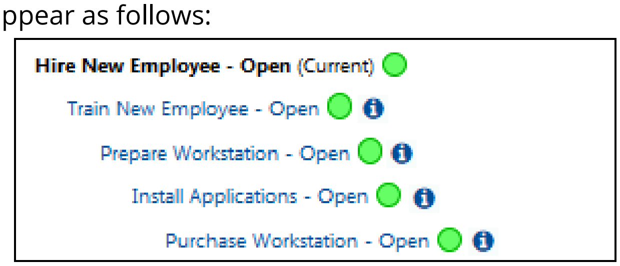
You can remove a top level change and its hierarchy template structure from a larger hierarchy structure. In the following example:



In the Set Up New Employee change, you can select Change | Hierarchy | Remove Change and Dependent Hierarchy. The Set Up New Employee change and its lower levels will become a standalone structure as shown below:

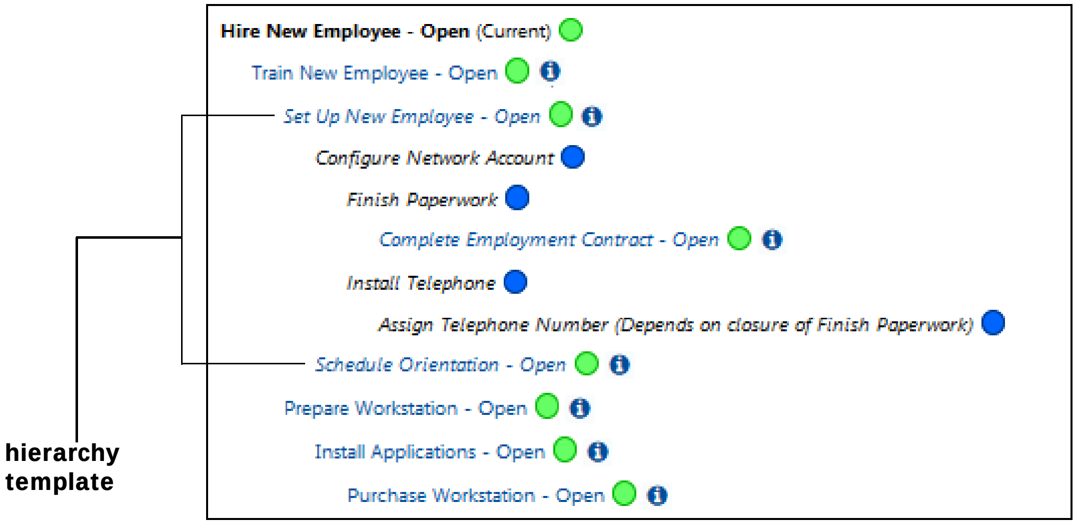


The rest of the structure would appear as follows:

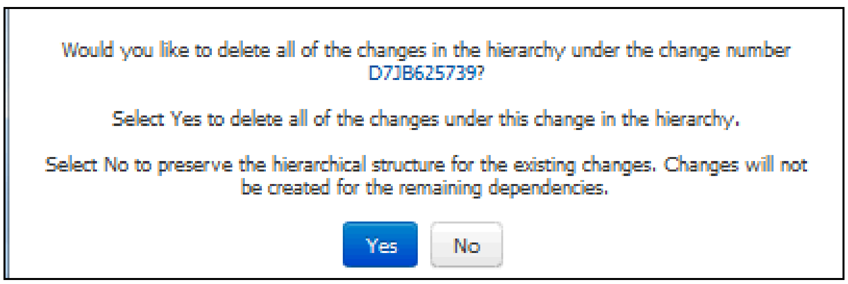


Deleting a Top-Level Change in a Hierarchy Template Structure

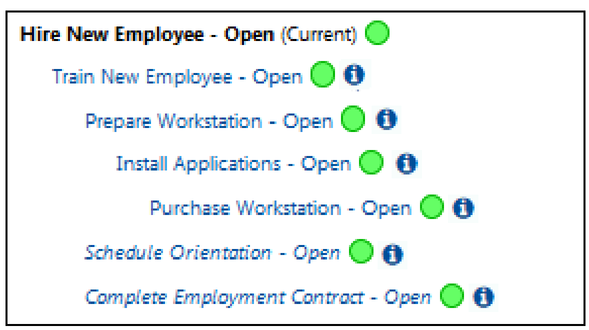
When you delete a top level change in a hierarchy template, you'll have the option of retaining its lower level changes. In the example below:



If you delete the Set Up New Employee change, the following prompt appears:

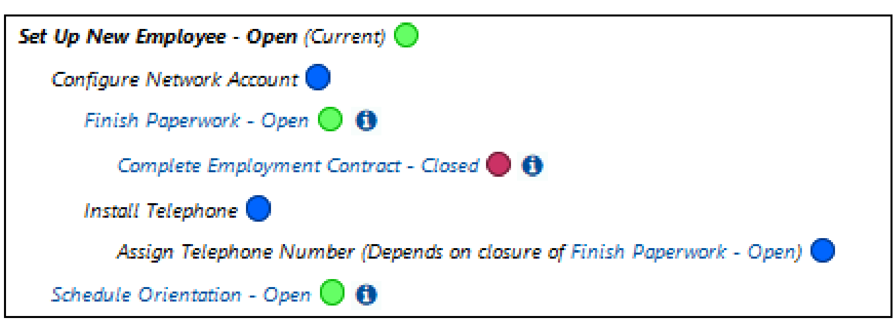


If you select No, the structure would appear as follows.

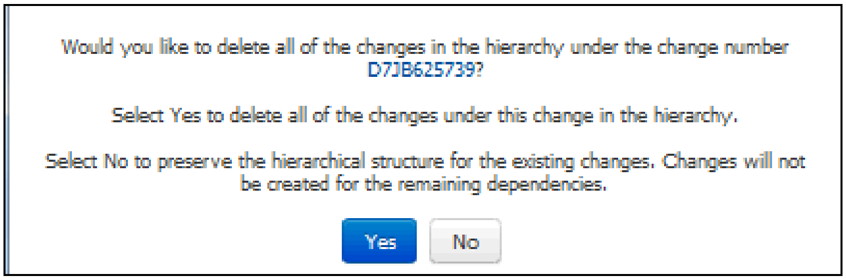


Deleting Lower Level Changes in a Hierarchy Template Structure

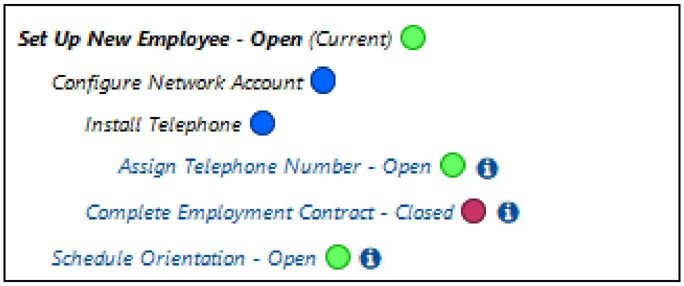
If you delete a change in a lower level of a hierarchy template structure, you have the option of deleting the change's lower level changes. Changes will be created from template placeholders above it if dependencies are met. In the following example:



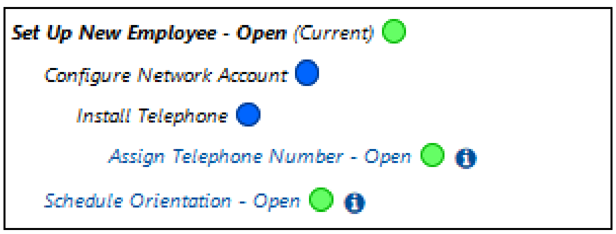
If you delete the Finish Paperwork change, the following appears:



- If you select No (you wish to retain its lower level changes), the lower level changes will go up a level. The structure will appear as shown in the example below; note that the Complete Employment Contract change is now one level below the Configure Network Account change.

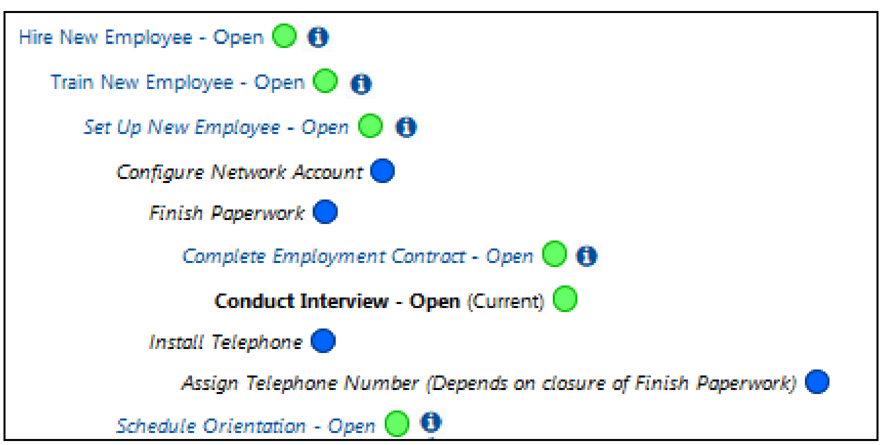


- If you select Yes (you wish to delete its lower level changes), lower level changes (Complete Employment Contract in this example) will be deleted. The example structure is as follows.

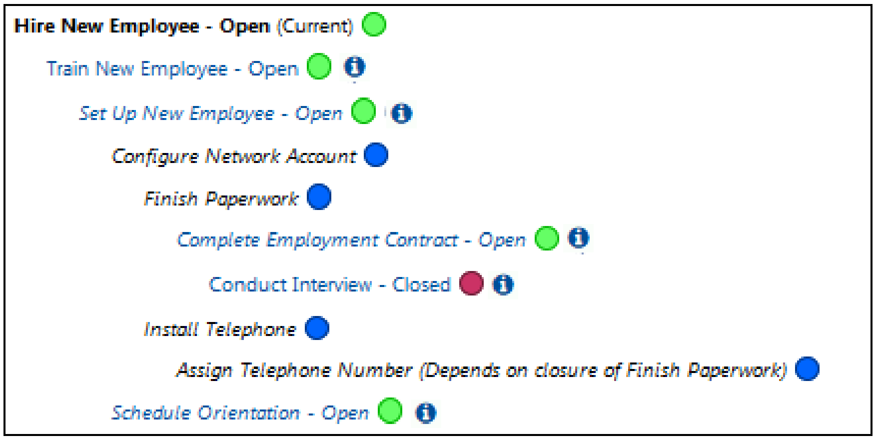


Working With Hierarchy Template and Related Change Structures

When a change structure contains both a dynamic hierarchy (created via the New | Related Change function) and a hierarchy template structure, actions of the changes in the dynamic hierarchy do not affect the changes in the hierarchy template structure above it. In the example below, the Conduct Interview change was is not part of the hierarchy template, and it was added via New | Related Change:

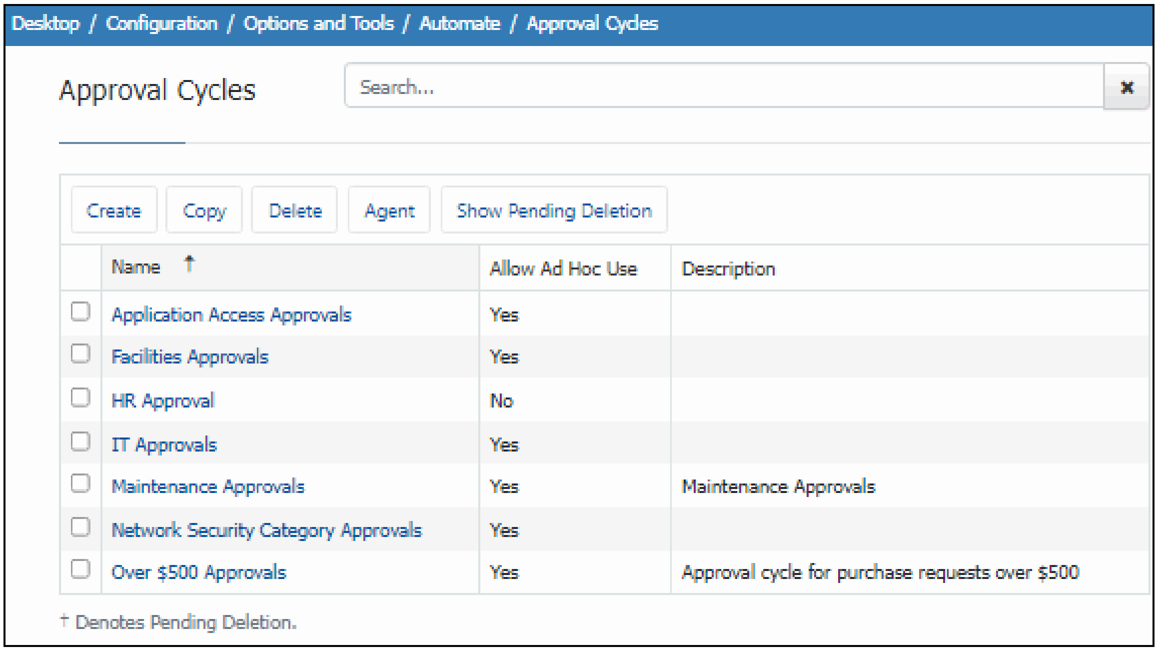


If you close the Conduct Interview change, the structure is as follows. Note that the changes in the hierarchy template structure are not affected by the closure.



Configuring Approval Cycles

The Approval feature requires work items to be approved by designated approvers before most functions can be performed. (You can, however, enable modifications via a setting in the Incident, Change, and Purchasing Basics screens.)

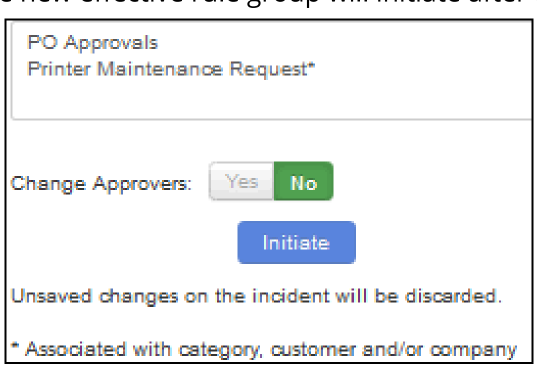


You can use the Show Pending Deletion link to display records that have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes these records. When the Show Pending Deletion link is selected, records that are pending deletion will display with a cross symbol.

Approvers can be support representatives or customers, and delegates can be set. See “Specifying Approvers” on page 102 for more information.

Approval cycles are applied to incidents, changes, and purchase requests as follows:

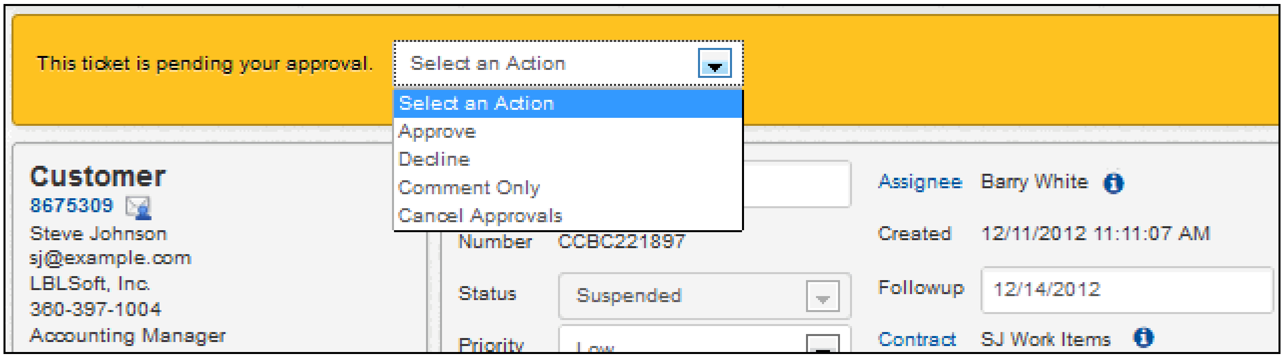
- The customer, company, selected category (for incidents and changes), or template has an associated approval cycle.
- A rule that initiates an approval cycle is in effect for an incident, change, or purchase that meets configured conditions. Multiple cycles can be specified for a rule group but only one cycle can be active at a time, and approval functionality is not affected by the business hours configured for a rule group. If a canceled or completed cycle needs to be run again, the rule it is linked to will need a condition that can be set on the work item or the support representative can initiate an ad hoc approval. If the cycle associated with a category is specified, the lowest level category is checked and if no cycle is associated, the next (higher) level is checked, and so on up the category hierarchy.
- An ad hoc approval cycle is selected by the assignee via the Ad Hoc Approval option. Note that an active ad hoc approval cycle for an incident or change will not be cancelled when the effective rule group changes; any approvals that are defined by the new effective rule group will initiate after the ad hoc cycle is approved.



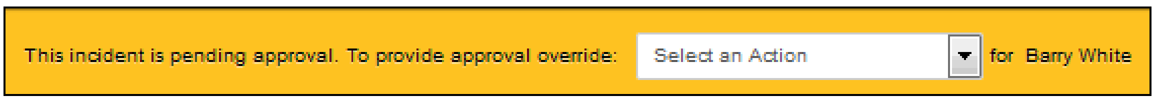
The status of the work item will change throughout the process as configured for the initial status, final approval, final decline, and cancellation. Notifications can be sent for approval events and verdicts.

Specifying a Verdict

When an approval cycle is in effect, an alert bar will appear with an action dropdown for specifying a verdict and/or comments for the next approver(s) in the current approval cycle or support representatives with approval override.



The following will appear if a support representative is not the current approver but has approval override:



The alert bar will only include a message stating "This <*work item type*> is pending approval" for support representatives who do not have approval override or are not the next approvers for the current cycle.

The following can be selected:

- **Approve** - If it is a concurrent cycle, the approval cycle will stop if the number of Approve verdicts specified for the cycle is reached. All approvers must specify an approval for a serial cycle.
- **Decline** - A Decline verdict requires an entry in the Comments field. In a serial cycle, the cycle reaches final decline if one of the approvers sets a verdict of Decline. In a concurrent cycle, the approval cycle will stop if the number of Decline verdicts specified for the cycle is reached. If any approval cycle results in a Decline verdict, no further cycles will apply.
- **Comments Only** - When a Comments Only verdict is specified, the comments will be included in notifications sent to designated recipients.
- **Cancel Approvals** - A Cancel Approvals verdict requires an entry in the Comments field, and the comment will be included in the Approval Audit History entry. If the Cancellation Status configured for the approval cycle is a Closed status, the comment is appended to the text in the Resolution field (for incidents), Results field (for changes), or Comments field (for purchase requests). An approval cycle can be cancelled by the customer or any support representative with Edit permission (whether or not they are an approver or have approval override).

A reminder notification can be configured to be sent a specified number of hours after the initial approval request is sent; it can be configured to be sent repeatedly until a verdict is specified.

If the status is changed to Closed via data override, the cycle will be cancelled and notifications will not be sent. Note that if an incident or change is reopened, approvals do not automatically restart.

If a rule group-required cycle is completed or canceled, the Initiate Ad Hoc Approval option will be available for initiating another approval cycle.

Configuration Overview

Do the following to configure approvals:

- Enable approval functionality via the Global Settings screen.

- Configure approval cycles via the Options and Tools | Automate | Approval Cycles screen. You can designate approvers, assign default status levels, and create customized notifications for approval events.
- Approval cycles are automatically initiated via rules in the rule group that is in effect for a work item. Use the Rules and Rule Groups screens to configure the rules that will trigger either an initial approval cycle or a cycle associated with a category, customer, template, or company.
- Configure additional approver options:
  - Enable support representatives to override an approval. Use the Support Representative Profile screen to enable a support representative to specify a verdict if not designated as an approver for the cycle in effect.
  - In the Support Representative Profile and Customer Profile screens, you can select an approver delegate who can specify a verdict in place of the approver(s) designated for an approval cycle.
  - Use the Allow Approvers to Edit During Approval Cycle field in the Incident, Change, and Purchasing Feature Basics configuration screen to enable support representatives designated as approvers (or those with Approval Override) to have access to all functionality except Status in records in an approval cycle. Use the Recipient Notification Mappings field to select the recipients and notifications to be sent to others in the cycle that have previously approved the record.
  - If using the customer's approver for a cycle, designate approvers via the Customer Profile screen.
- If applicable, associate approval cycles with categories (for incidents and changes), customers, companies, and templates.
- If customers will be approving, add the Approval button to the applicable display page via the mySupport | mySupport Options screen.

Creating an Approval Cycle

Use the Approval Cycle screen to configure approval cycles consisting of serial or concurrent approvers, notifications, and statuses to assign while the cycle is in effect, final approval/decline, and cancellation. The same approval cycles are used with incidents, changes, and purchase requests; however, you can designate statuses and notifications that are specific to each type of work item.

Name - Enter a name for the approval cycle.

Description - Enter a description of the approval cycle.

Available for Ad Hoc Use - Select Yes to enable the approval cycle to be available in the Incident, Change, and Purchase Request screens for support representatives to initiate on saved records.

Type of Approval - Select:

- Serial to enable approvers to specify a verdict one at a time in a designated order. All approvers must approve the incident or change (if enabled), and the cycle will stop if an approver specifies a Decline verdict.
- Concurrent to enable all approvers to specify a verdict at the same time. The cycle will complete after the number of Approve verdicts is equal to the number in the Number of Verdicts Required for Final Approval field. The cycle

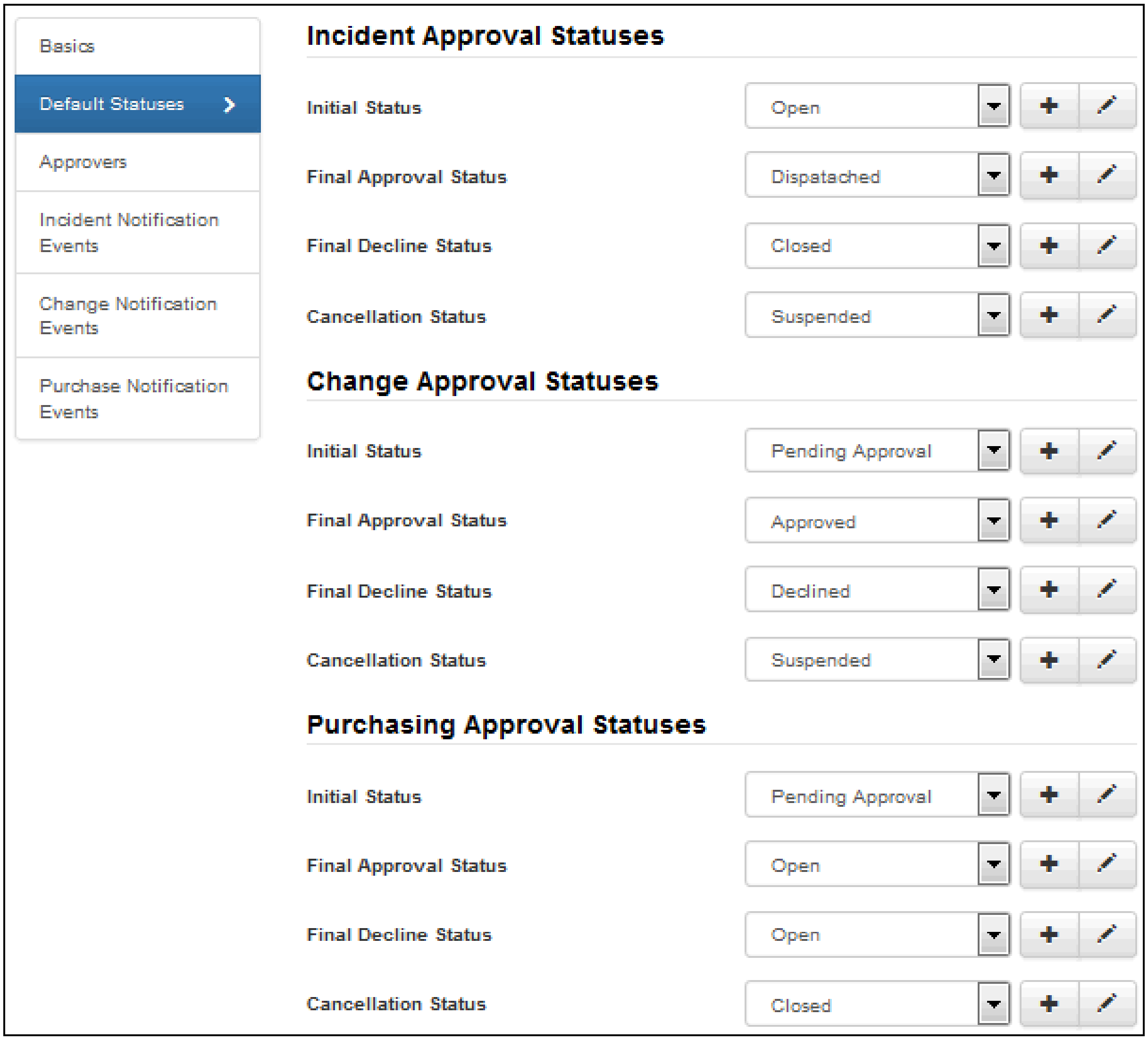
will stop after the number of Decline verdicts is equal to the amount specified in the Number of Verdicts Required For field.

Number of Verdicts Required for/Final Approval/Final Decline - This field appears if Concurrent is selected in the Type of Approval field.

- In the Final Approval field, select the number of Approve verdicts needed to complete the cycle.
- In the Final Decline field, select the number of Decline verdicts needed to stop the cycle.

Default Statuses

Use the Default Statuses tab to assign a status to each stage of the approval cycle.



Default Approval Incident/Change/Purchase Statuses - Select the status to assign at each stage of the approval cycle. Use the ✚ Create New and ✎ View/Edit options to access the applicable Custom Status Label screen.

- In the **Initial Status** field, select the status to assign when an incident with the rule group is initially saved.
- In the **Final Approval Status** field, select the status to assign when:
  - For a serial cycle, all approvers have specified an Approve verdict.
  - For a concurrent cycle, the number of Approve verdicts is equal to the number in the Number of Verdicts Required for Final Approval field.
- In the **Final Decline Status** field, select the status to assign when:
  - For a serial cycle, an approver specifies a Decline verdict.

    - For a concurrent cycle, the number of Decline verdicts is equal to the number in the Number of Verdicts Required for Final Decline field.
- In the **Cancellation Status** field, select the status to assign when a support representative with Incident Edit permission or customer assigned to an incident specifies a **Cancel Approvals** verdict.

Specifying Approvers

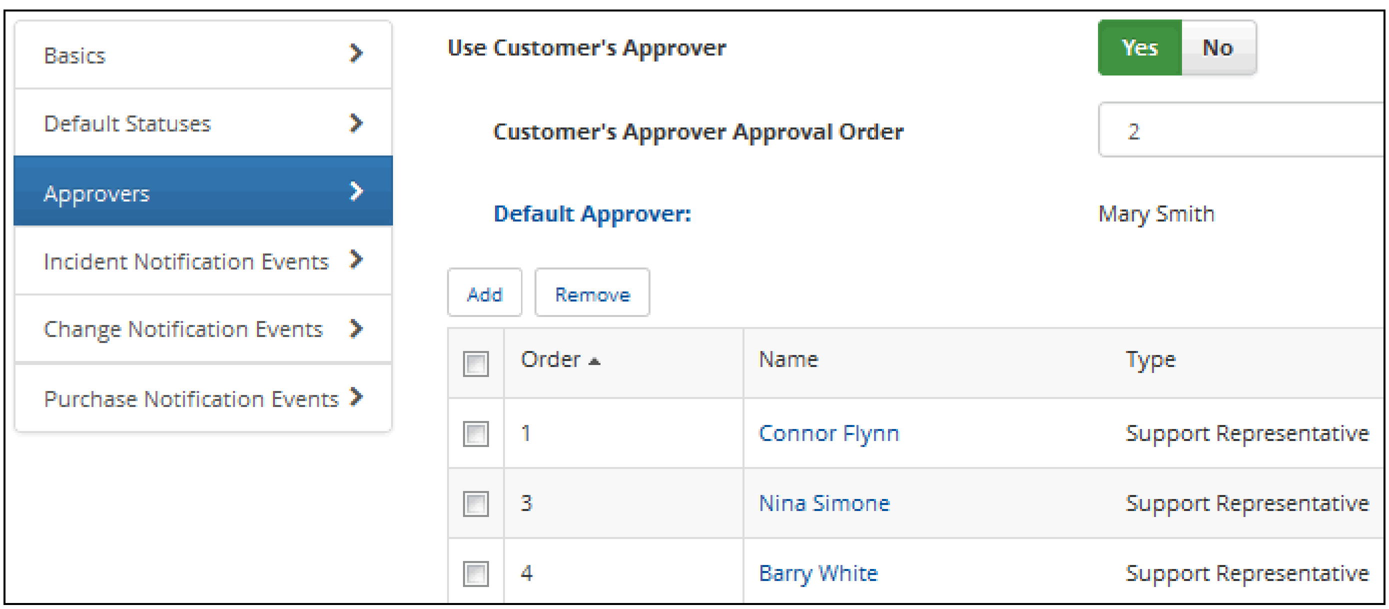
Use the Approvers tab to specify the approvers for the approval cycle. Note that a support representative can change the approvers if an ad hoc approval cycle is initiated.

A customer can be assigned an approver (support representative or another customer) in their Customer Profile record; if using Active Directory integration as a customer data source and a record in Active Directory has a value in the Manager field, the AD manager will be populated in that field. An approver delegate can be set for a customer in their Customer Profile record; if enabled in the mySupport Portal Options screen, a customer can designate their own approver delegate via the mySupport Portal Account Settings screen.

Approver delegates can specify a verdict on work items pending approval for the specific customer or support representative to which they are a delegate.

If a support representative is designated as an approver, any lower level permissions are overridden (for example, if the representative does not have permission to edit but is designated as an approver, a verdict can still be submitted). Approver override can be enabled for a support representative in their profile; this allows them to specify a verdict on any work item pending approval that they can access. Another support representative can be designated as a delegate for a support representative via their profile, and a support representative can designate their own delegate via the Preferences screen on the Desktop.

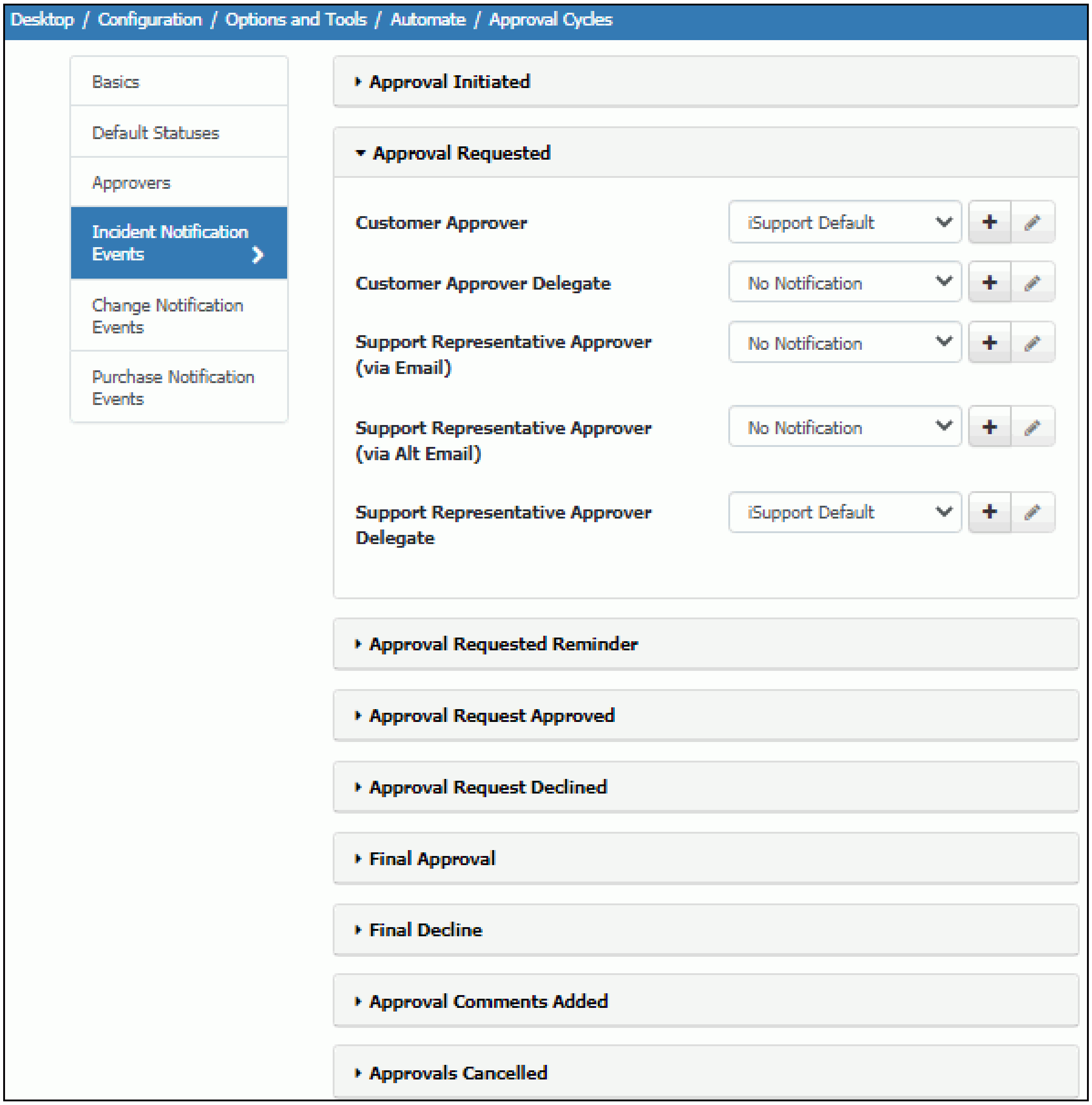
In the Use Customer's Approver field on the Approvers tab in the Approval Cycle configuration screen, select Yes if you wish to use the approver specified in the Approver field in the Customer Profile screen. If it is a serial cycle, use the Customer Approver Approval Order field to specify the position of the customer's approver in the order for the cycle. Use the Default Approver field to specify an approver to use if the Approver field is blank in the Customer Profile screen. Click the Add link to select support representative or customer approvers. Be sure to click the Add button at the bottom of the screen when finished. The selected approvers appear in a list; if it is a serial cycle, you can change the order in which approvers will specify a verdict by clicking the approver's name to display a numeric dropdown field in the Order column.



Configuring Approval Notifications

Use the Notifications tab to configure notifications to be sent for all approval events. For each event and recipient you can select iSupport's default notification, a predefined custom notification, or you can select Create New Custom

Notification to access the Custom Notifications screen to create one or view default notification text. Notification recipients can include both support representatives and customers, and the default text is different for each.



Approval Initiated - Select the recipients and notifications to be sent when the <*Incident/Change/Purchase*> is saved with an associated approval cycle.

Approval Requested - Select the recipients and notifications to be sent when the applicable work item requires approval. You can select Customer Approver, Support Rep Approver (via email), and/or Support Rep Approver (via alternate email).

If a concurrent cycle is in effect, the notification will be sent to all designated approvers in the cycle. For example, if both Customer Approver and Support Rep Approver are selected, the notification will be sent to all of the customer approvers and support representative approvers for the cycle.

If a serial cycle is in effect, the notification will be sent to the next approver in the cycle.

Approval Reminder - This section appears when the Approval Requested Reminder Event is selected. Select Yes to enable a reminder notification to be sent on an interval basis if the approvers have not submitted a verdict after the approval request is sent.

Approval Requested Reminder - This section appears when the Approval Requested event is selected. Select Yes to enable a reminder notification to be sent if the approvers have not submitted a verdict after the approval request is sent.

Use the **Send Reminder <x> Hour(s) After Approval Request Sent** field to specify the number of hours after the approval request is sent in which to send the reminder notification. Use the Maximum Number of Reminders field to enter the maximum number of times in which the notification should be sent.

Select the recipients and notifications to be sent a reminder notification on an interval basis if the approvers have not submitted a verdict after the approval request is sent.

Notifications are sent on the schedule of the Approval Reminder agent on the Agents tab; be sure to enable and set the interval for this agent.

Request Approved - Select the recipients and notifications to be sent when an approver or support representative with approval override submits a verdict of Approved.

Request Declined - Select the recipients and notifications to be sent when an approver or support representative with approval override submits a verdict of Declined.

Final Approval - Select the recipients and notifications to be sent when an approver or support representative with Approval Override submits a verdict of Approved **and**:

- If a concurrent cycle is in effect, the number of approval verdicts is equal to the number specified in the Number of Verdicts Required for Final Approval field on the Basics tab.
- If a serial cycle is in effect, the approver is the last in the cycle.

Final Decline - Select the recipients and notifications to be sent when an approver or support representative with Approval Override submits a verdict of Declined:

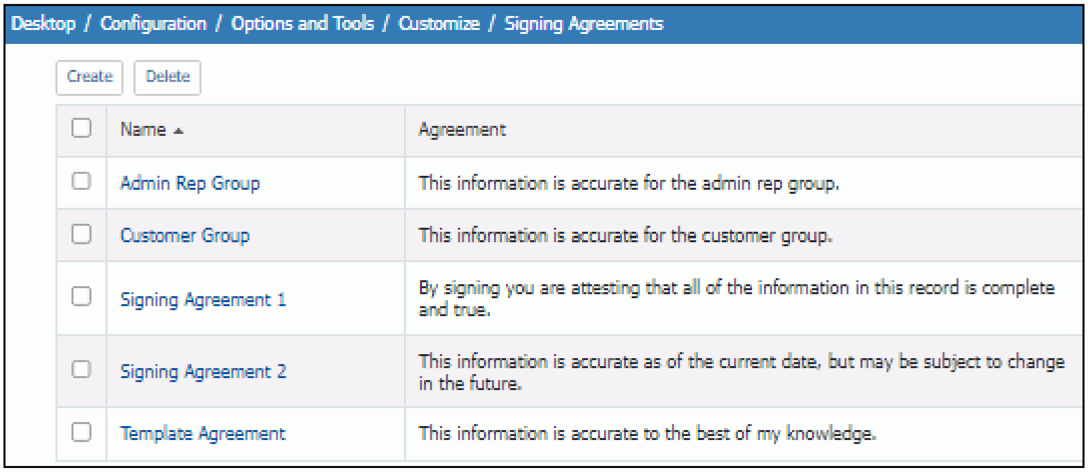
- If a concurrent cycle is in effect, the notification is sent when the number of Decline verdicts is equal to the number specified in the Number of Verdicts Required for Final Decline field on the Basics tab.
- If a serial cycle is in effect, the notification is sent whenever a Decline verdict is submitted.

Comments Added - Select the recipients and notifications to be sent when an approver or support representative with Approval Override submits a comment.

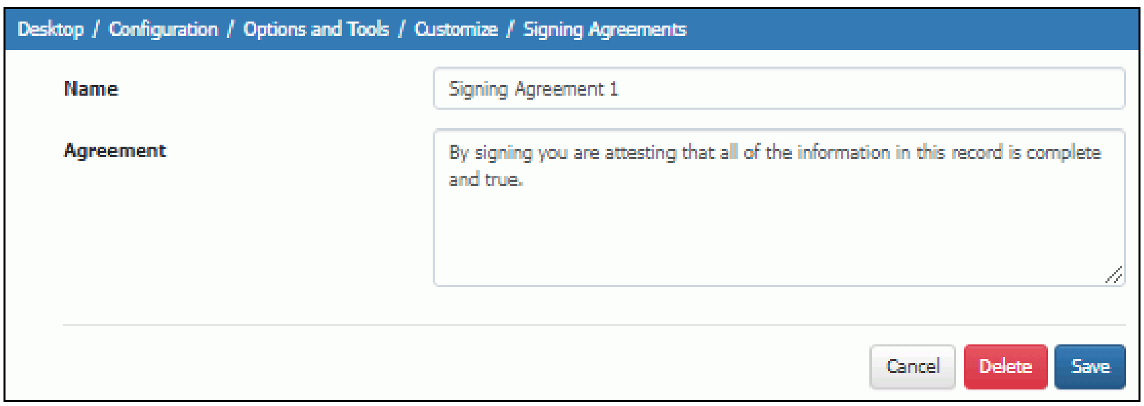
Approval Canceled - Select the recipients and notifications to be sent when the approval cycle is canceled by the customer or a support representative with *<Incident/Change/Purchase>* Edit permission.

Configuring Signing Agreements

Signing agreements 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.



Use the Configuration | Options and Tools | Customize | Signing Agreement configuration screen to create a signing agreement.



If an incident or change involves more than one associated signing agreement (associated with the 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.

When the Sign dialog has been completed by the user, the text and signature are saved as an image in an attachment and a notation with the name of the signature agreement is included in the History field. Note that this feature is not available for mySupport.

Configuring Calendar and Meeting Integrations

You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Microsoft 365 Teams and Planner, and Zoom to display an option in the Incident, Problem, Change, and Customer Profile screens for initiating a meeting.

Note: iSupport utilizes or integrates with a number of third party applications and resources; changes in these external applications and resources may have a negative impact on functionality in iSupport. Depending on the nature and degree of the change, iSupport will, at its discretion, revise the current version of iSupport or make a corrective change in a future release of iSupport.

Google Calendar/Meet

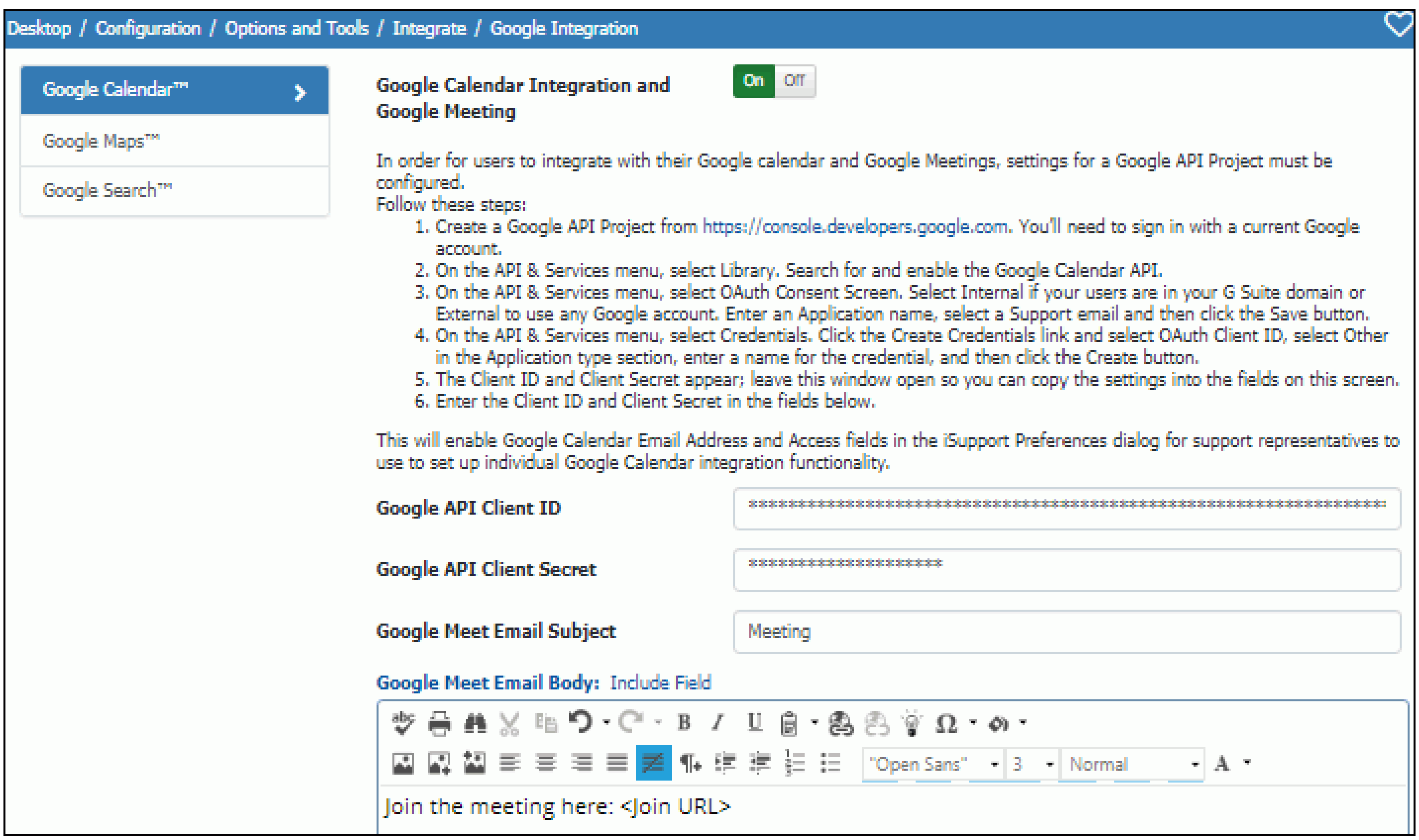
Set up Google Calendar integration in the Options and Tools | Integration | Google Integration screen to enable users to access their Google Calendar for the Calendar option on the Desktop and mySupport portals, a New Meeting option in iSupport entry screens for scheduling a Google Calendar meeting, and a Google Meet option to appear in work item screens for starting a meeting.

With Google Calendar, support representatives can view the schedules of meeting attendees, create a meeting to be added to their calendar, and configure a notification to be sent to the meeting attendees.

When the Google Meet option is selected, the Generate Join URL dialog will appear for you to enter the topic, share the Join URL, and email a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog.

The timeframe (work hours) during which support representatives are available to be scheduled via iSupport can be set via the Desktop or Support Representative Profile screen. On the Desktop, a support representative can view their calendar via the Calendar component and work item-specific calendars can be viewed from action menu. Administrators can view support representative calendars via the Support Representative Profile screen.

On the Google Calendar tab, follow the steps on the screen and copy the Google API Client ID and Secret into the applicable fields. Enter the subject body of the email to be sent for the scheduled meeting; use the Include Field link to add field values regarding the meeting.

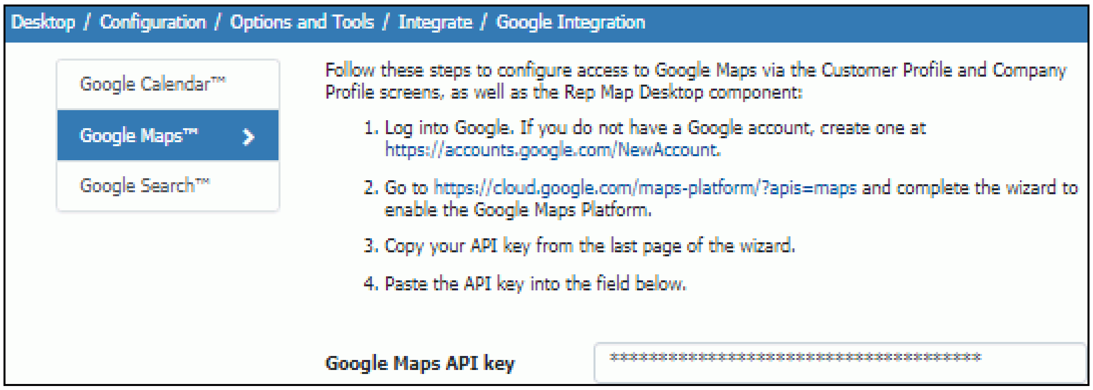


Note: Support representatives will need to use the Google Calendar Email Address and Google Calendar Access fields on the Details screen in the Preferences dialog to enable access to their calendar(s) and set the work day hours during which they are available to be scheduled via iSupport. (The dates/times outside of work day hours are designated as "Unavailable" in the calendars displayed via iSupport.) After clicking the Grant Access link, a Google dialog will appear for the support representative to allow iSupport access to their calendar and a code will be provided. The Grant Access to Your Google Calendar dialog will appear in the Preferences screen with an Auth Code field for pasting the code. After clicking Continue, “Access Granted” will appear in the Google Calendar Access field.

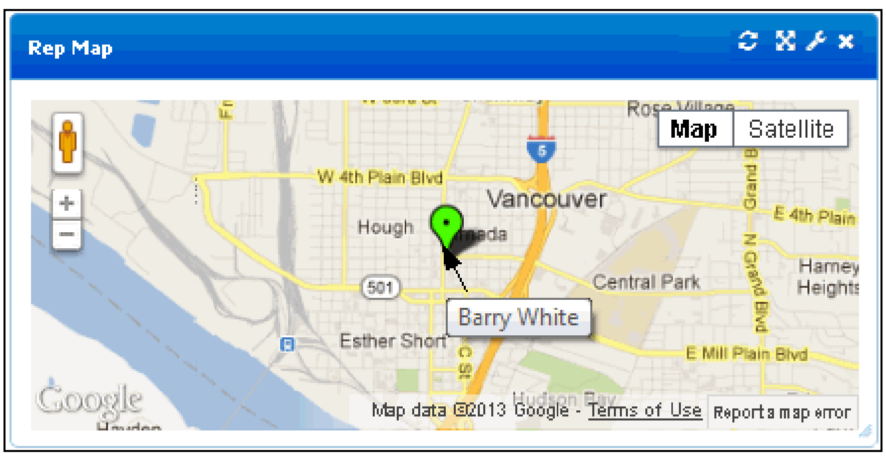
Google Meet meetings can be included in work item screens; add the Google Meetings field to a work item screen layout via the Layouts configuration screen.

Google Maps

Use the Google Maps tab in the Options and Tools | Integration | Google Integration screen to enable access to Google Maps via the Customer Profile and Company Profile screens, as well as the Rep Map Desktop component. Follow the steps on the screen and enter the Google Maps API key.

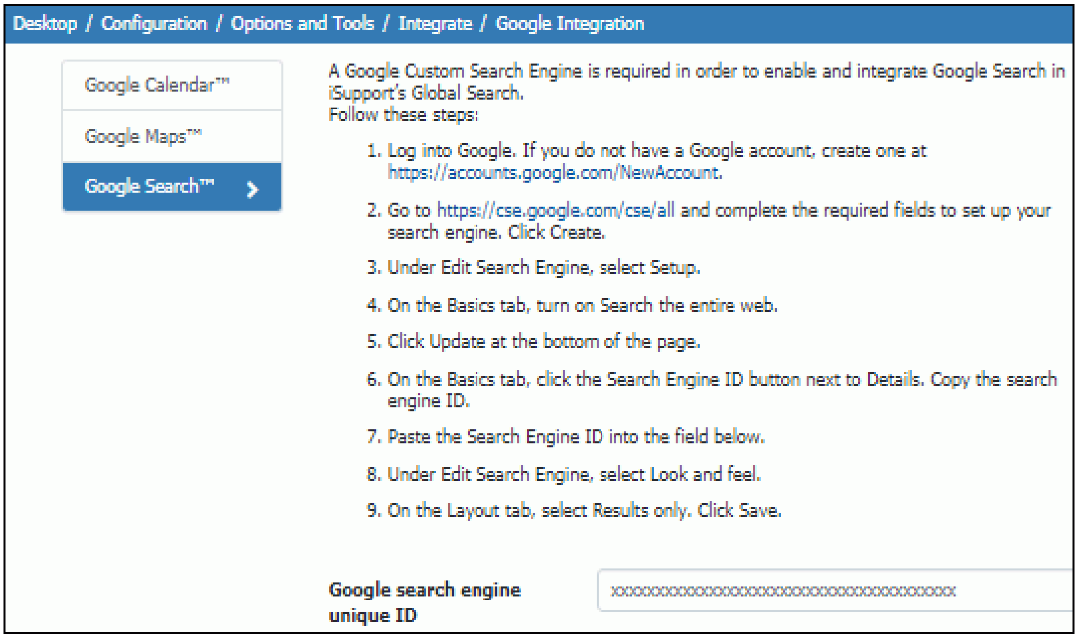


Maps will appear as shown in the example below.

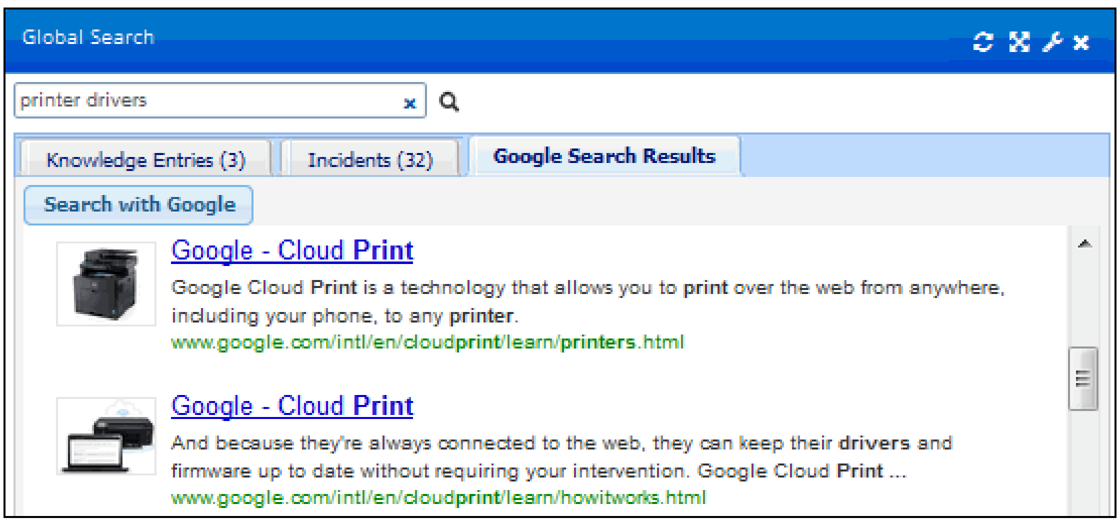


Google Search

Use the Google Search tab in the Options and Tools | Integration | Google Integration screen to enable access to Google Search throughout the application. Follow the steps on the screen to create a Google Custom Search Engine, copy the unique ID from the Google Custom Search Engine screen, and enter it in the Google Search Engine Unique ID field.



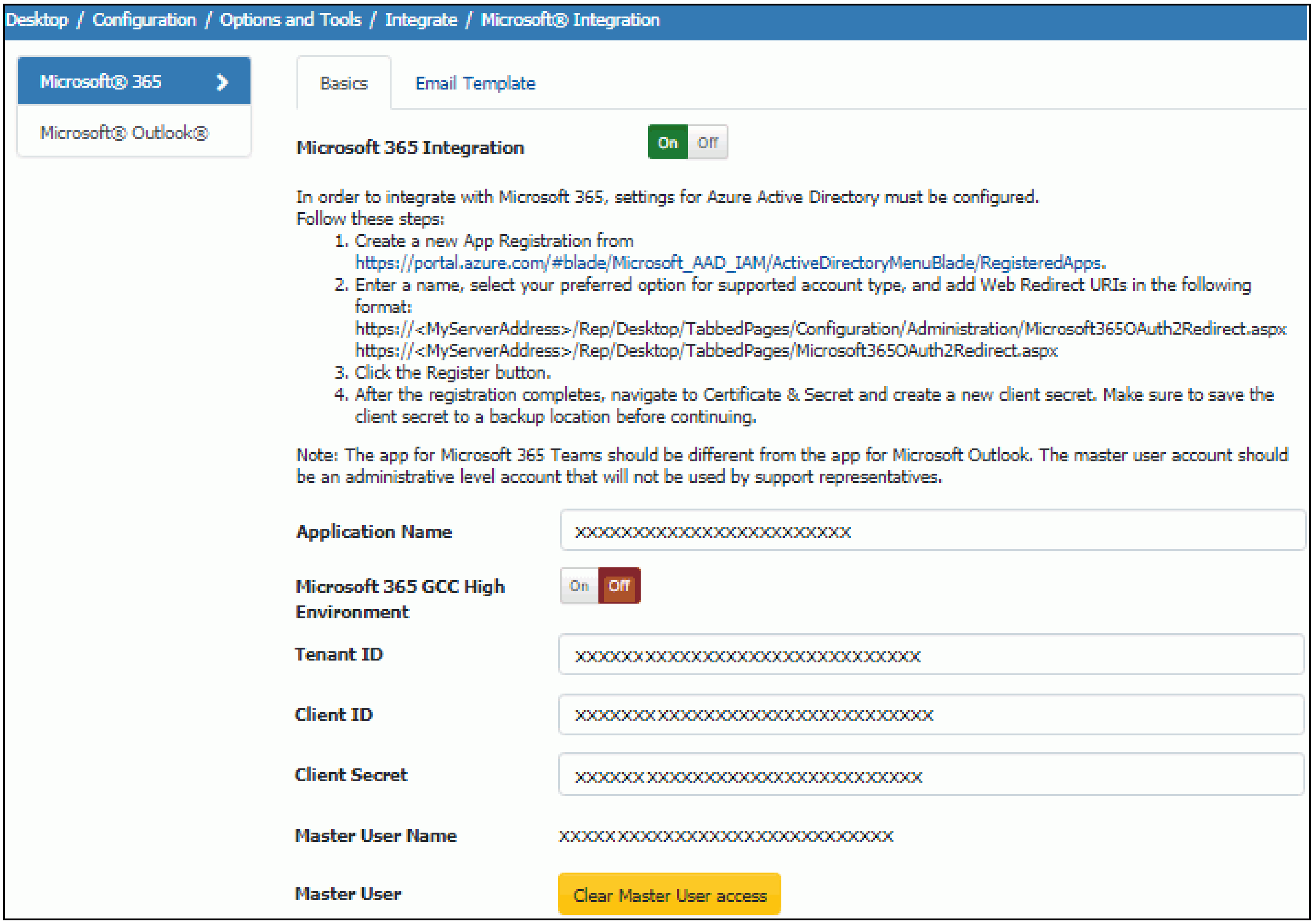
The Google Search tab will appear in the Global Search component as shown in this example.



Microsoft 365 Integration

Use the Microsoft 365 tab in the Options and Tools | Integration | Microsoft Integration screen to enable the Microsoft Teams Planner component on the iSupport Desktop for viewing and accessing scheduled and unscheduled

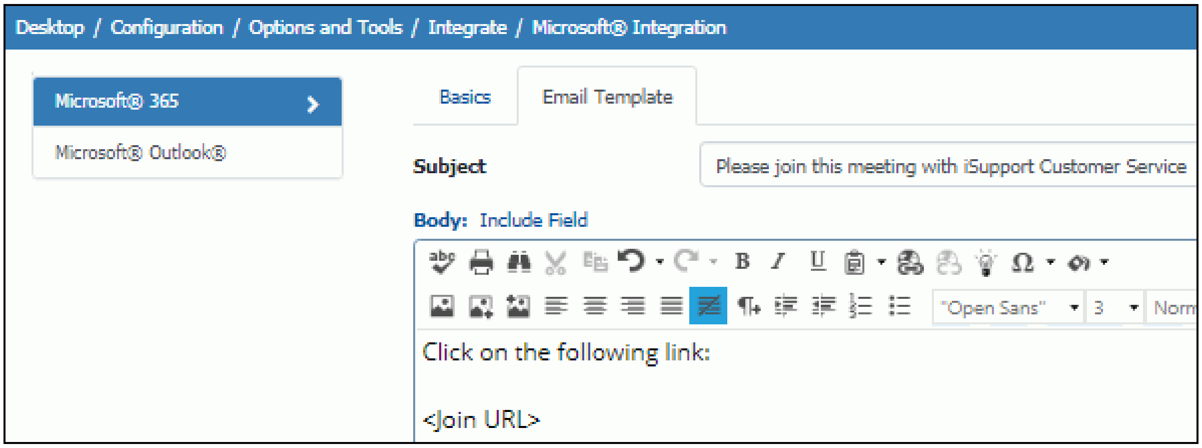
Microsoft Teams tasks, and enabling Microsoft Teams Meeting and Planner Task option to appear in work item screens for creating meetings and tasks with prefilled references to the iSupport work item number.



Follow the steps on the screen and complete the fields. Note that this requires administrator level access in Microsoft. The app for Microsoft 365 Teams should be different from the app for Microsoft Outlook. The master user account should be an administrative level account that will not be used by support representatives. Enable the Microsoft GCC High Environment setting if your Microsoft account was created under the .US domain in a Government Community Cloud High environment.

If you wish to allow support representatives to enable access to Teams and a group calendar in the Preferences screen without Microsoft administrator level access, ensure that you select the Consent On Behalf of Your Organization checkbox while requesting permissions in this screen. The Master User account is used for Team channel posts via rules and Outlook calendar groups available for display on dashboards.

Use the Email Template tab in the Microsoft 365 Integration screen to enter defaults for the subject and body of the email to be sent with a link to the meeting.



Note: Support representatives will need to use the Microsoft 365 Access field on the Details screen in the Preferences dialog to enable access to their calendar(s).

To add list fields of Microsoft Teams meetings and Planner tasks in work item screens, add the Microsoft Teams Meetings and Microsoft Planner Tasks fields to a work item screen layout via the Layouts configuration screen.

You can utilize the MS Teams Channel recipient with the Notify - Email action in work item rules.

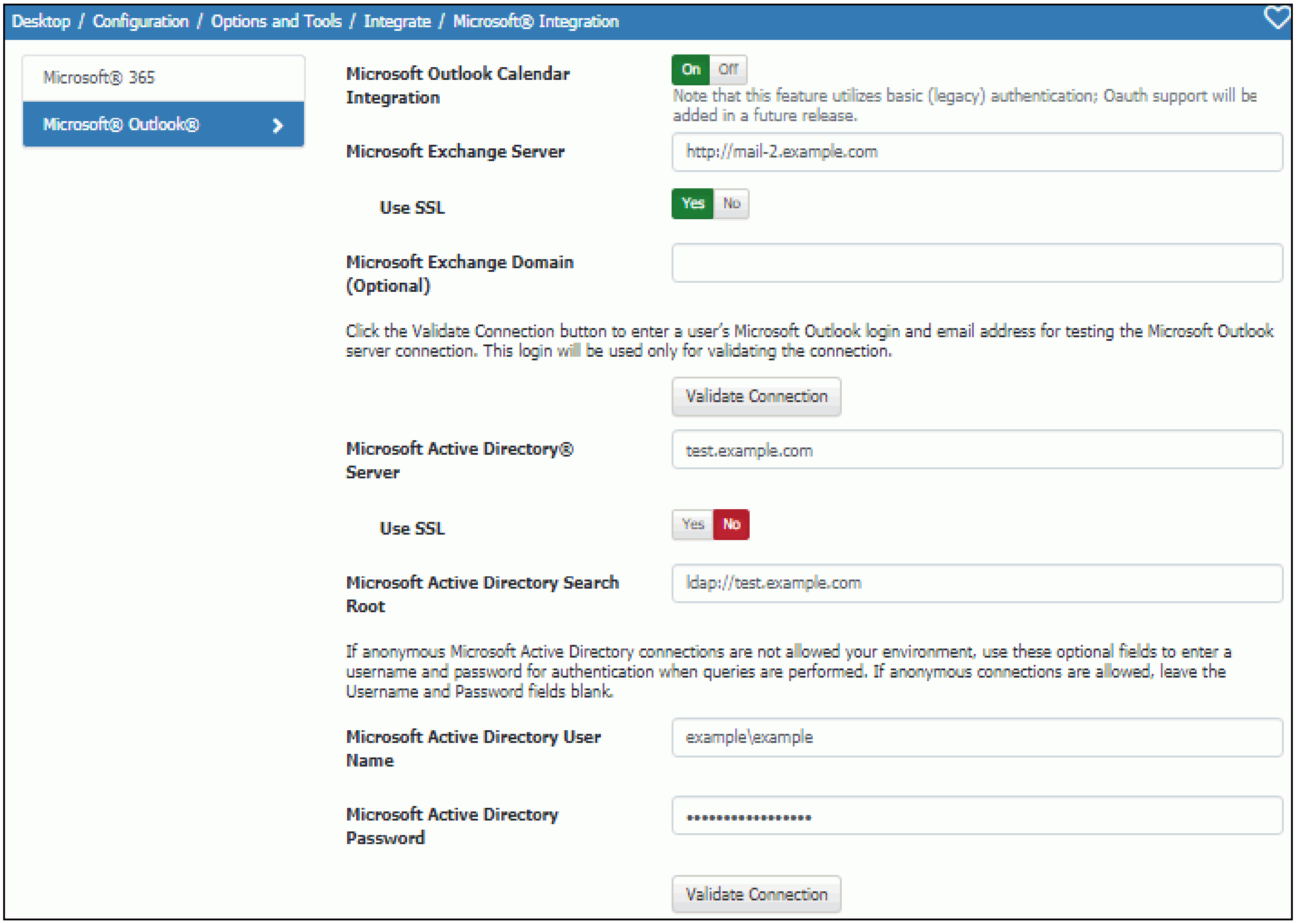
Microsoft Outlook Calendar Integration

Use the Microsoft Outlook tab in the Options and Tools | Integrations | Microsoft Integration screen to enable:

A New Meeting option to appear in iSupport entry screens after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting.

A support representative to view their calendar via the Desktop Calendar component and work item-specific calendars via the Action menu. Administrators can view support representative calendars via the Support

Representative Profile screen. Support representatives can view the schedules of meeting attendees, create a meeting to be added to their calendar, and configure a notification to be sent to the meeting attendees.



Microsoft Outlook Calendar Integration - Select On to enable the Microsoft Outlook Calendar Integration feature.

Microsoft Exchange Server - Enter the web address of the installation location of the Microsoft Exchange Server. If using SSL, the format must be: https://<*server*>

Use SSL - SSL is an encryption method that overlays the connection between the iSupport server and the Microsoft Active Directory server. Select Yes if SSL encryption is enabled on the Microsoft Active Directory server.

Microsoft Exchange Domain (Optional) - Enter the domain for accessing the Microsoft Exchange server. An entry in this field may be needed for a successful test connection.

A valid connection to the Microsoft Outlook server is required; click the Validate Connection button to enter a Microsoft Outlook login and email address to test the connection. Note that this information will be used only for validating the connection.

Microsoft Active Directory Server - Enter the installation location of the Microsoft Active Directory Server.

Use SSL - SSL is an encryption method that overlays the connection between the iSupport server and the Microsoft Active Directory server. Select Yes if SSL encryption is enabled on the Microsoft Active Directory server.

Microsoft Active Directory Search Root - Enter the complete search root URL for querying user information in Active Directory® entries. The search root can point to anywhere in the Active Directory® hierarchy, but the entry must be preceded by: ldap://

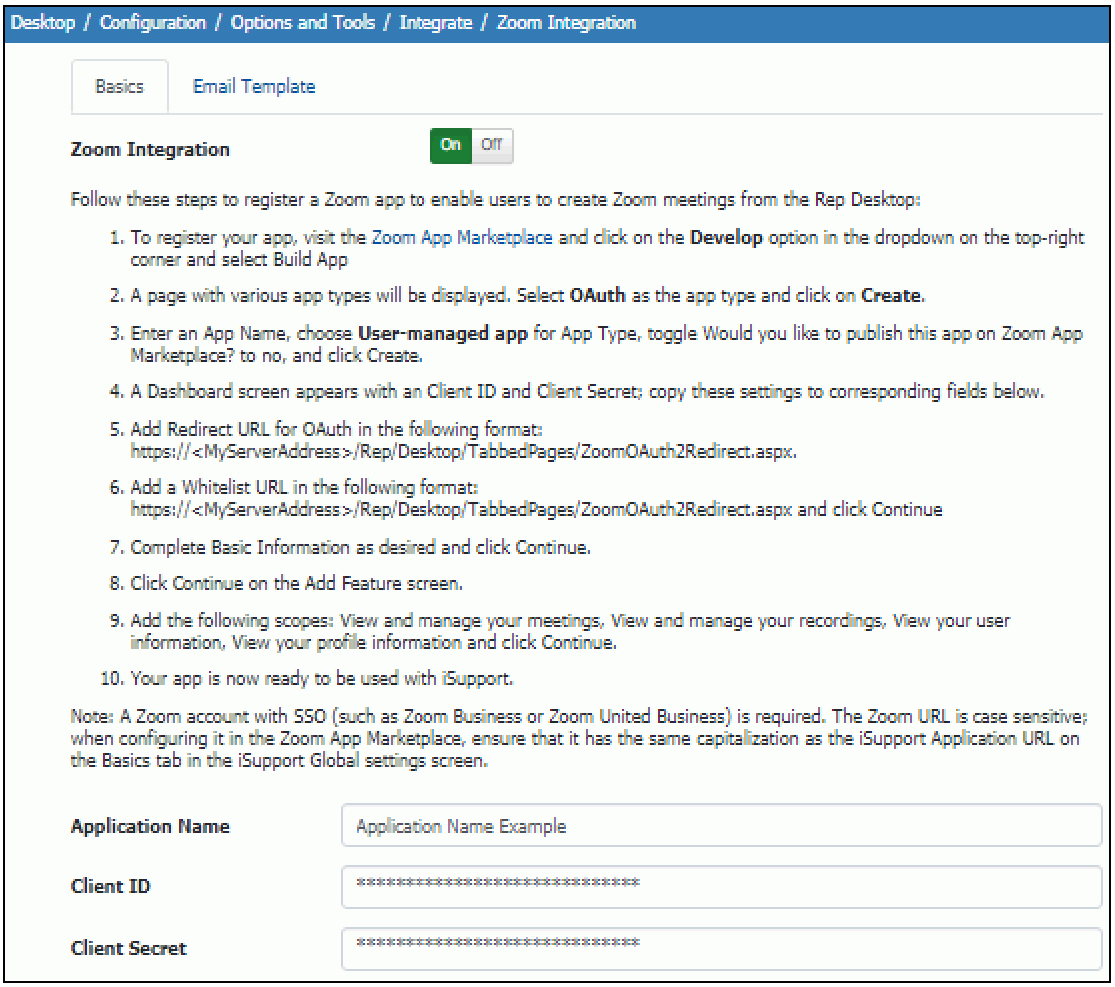
Microsoft Active Directory User Name/Microsoft Active Directory Password - If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a login for authentication when queries are performed. The username should be in the following format: DOMAINNAME\usernameIf anonymous connections are allowed, leave these fields blank.

Note: Support representatives will need to use the Microsoft Exchange User Name and Microsoft Exchange Password fields on the Details tab in the Preferences dialog and set the work day hours during which they are available to be scheduled via iSupport. The timeframe (work hours) during which support representatives are available to be scheduled via iSupport can be set via the Desktop or Support Representative Profile screen. (The dates/times outside of work day hours are designated as "Unavailable" in the calendars displayed via iSupport.)

Zoom Integration

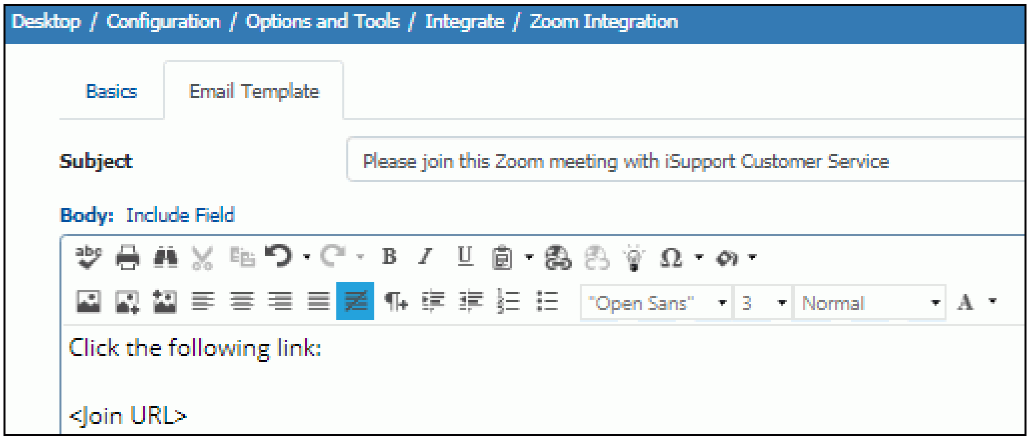
Use the Options and Tools | Integrations | Zoom Integration configuration screen to enable a Zoom Meeting option to appear in the Incident, Change, Problem, and Customer screens for scheduling an on-demand Zoom meeting. When the option is selected, a Generate Join URL dialog will appear for you to enter the topic and options for sharing the Join URL, and emailing a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog.

Follow the steps on the screen, enter an application name, and then enter the Client ID and Client Secret in the applicable fields.



Note: A Zoom account with SSO (such as Zoom Business or Zoom United Business) is required. The Zoom URL is case sensitive; when configuring it in the Zoom App Marketplace, ensure that it has the same capitalization as the iSupport Application URL on the Basics tab in the iSupport Global settings screen.

Use the Email Template tab in the Zoom Integration screen to enter the subject and body of the email to be sent with a link to the meeting.

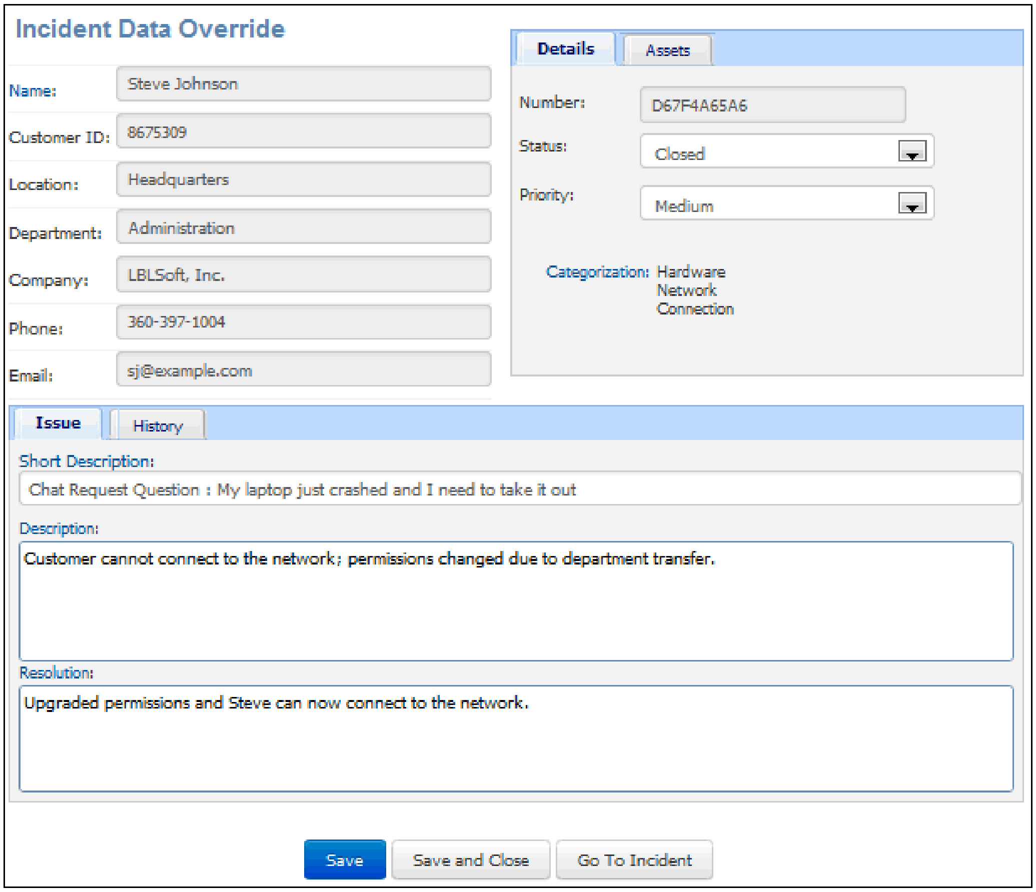


Zoom meetings can be included in work item screens; add the Zoom Meetings field to a work item screen layout via the Layouts configuration screen.

Using the Data Override Feature for Incidents, Problems, and Changes

Use the Options and Tools | Administer | Data Override feature to overwrite fields on any saved incident, problem, or change. When a change is made using this feature, it will be logged in the Audit History field and notifications will be suppressed. If an approval cycle is in effect and the status is changed to Closed via data override, the cycle will be canceled and notifications will not be sent.

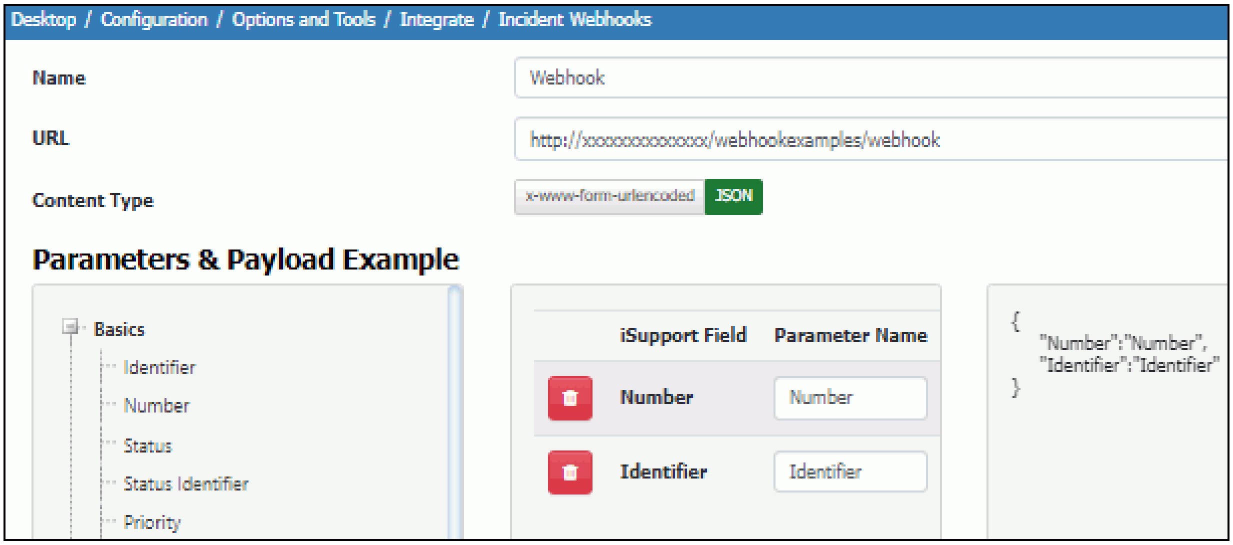
To access this feature, use the Override Data option on the applicable menu. It is available if the Allow Data Override field is enabled in your Rep Profile record.



Configuring Webhooks

Use the Webhooks screen to configure webhooks for posting iSupport data to a web application. You will specify a web application URL for iSupport to post data to and the fields containing the data you want to receive, and iSupport will post the field data to the URL when configured rule conditions and time frames are met.

In the Webhooks screen, enter the name of the webhook definition that will be used in the Rule screen and URL to which iSupport data should be posted. Drag the iSupport data source fields containing the data you want to receive into the frame on the right, and enter the corresponding fields on your web form in the Parameter Name column. Note that you can drag field rows vertically to reposition fields. Use the Content Type field to enable the output to be set to JSON (JavaScript Object Notation) Mime type and display the text of what the webhook will generate.



Use the applicable Rule screen to configure the conditions and time frame on which the post action will occur. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition. Be sure to add the rule to a rule group.