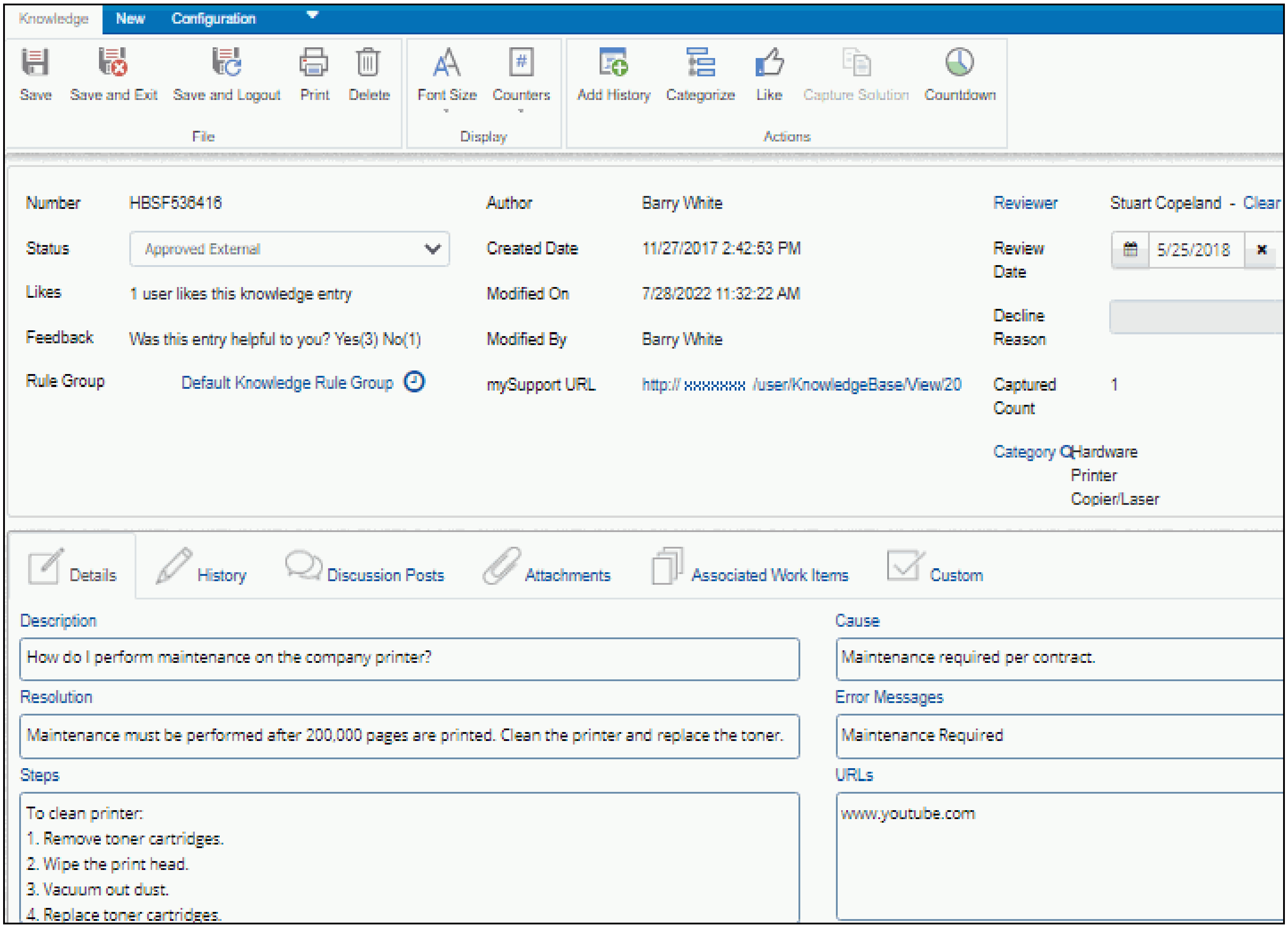
Configuring iSupport® Knowledge Functionality

iSupport's Knowledge functionality enables you to author, approve, and access knowledge entries which can be accessed by support representatives via the Desktop and the Incident, Problem, and Change screens, and by customers via the mySupport Desktop.



Basic Configuration

- Set basic Knowledge options via the Feature Basics screen. See "Configuring Knowledge Basics" on page 3.
- Set up categories, which are which are custom values that you create for describing incidents, knowledge entries, problems, and changes. (Note that the same category set is used with all of those features.) A category combination is required when entering a knowledge entry because knowledge entry searches performed in the Incident, Problem, and Change screens are based on the selected category combination. See the online help for more information.
- If applicable, configure roles/permissions for support reps and rep groups using Knowledge functionality via the Support Representatives screen. See the online help for more information.

Creating Knowledge Entries

- You can manually create knowledge entries via the Knowledge Entry screen. See the online help for more information.
- You can configure a prompt for automatic creation of a knowledge entry when an incident or problem is closed; enable this prompt via the Incident Management Feature Basics and Problem Management Feature Basics screens. See the online help for more information.

Customizing iSupport Defaults

- iSupport includes a default Knowledge screen layout with a comprehensive set of fields for tracking Knowledge data, but you can redesign it to include fields and tabs that are specific to your company. You can include a mySupport URL field in the Knowledge entry screen for support representatives to give to customers for accessing a knowledge entry on a mySupport portal. See "Configuring Screen Layouts" on page 17 more information.
- If there are fields you need that are not included in iSupport by default, you can create custom fields. See "Configuring Custom Fields" on page 10 for more information.
- Define Work History types to create custom entries for support representatives to select to describe the work performed on a work item. See "Configuring Work History Types" on page 46.

Sending Notifications

- You can use Knowledge rules to send Desktop and email notifications when specified conditions based on Knowledge record fields or events are met; for example, you can configure a rule to send a notification when a knowledge entry status changes. See "Configuring Rules and Rule Groups for Knowledge Entries" on page 29. You can use or copy and modify iSupport's default notifications, or you can create new custom notifications. See "Customizing and Viewing Event Notification Content" on page 41. You can include data from Knowledge records and designate any applicable recipients. See the online help for more information.

Using Workflow Features

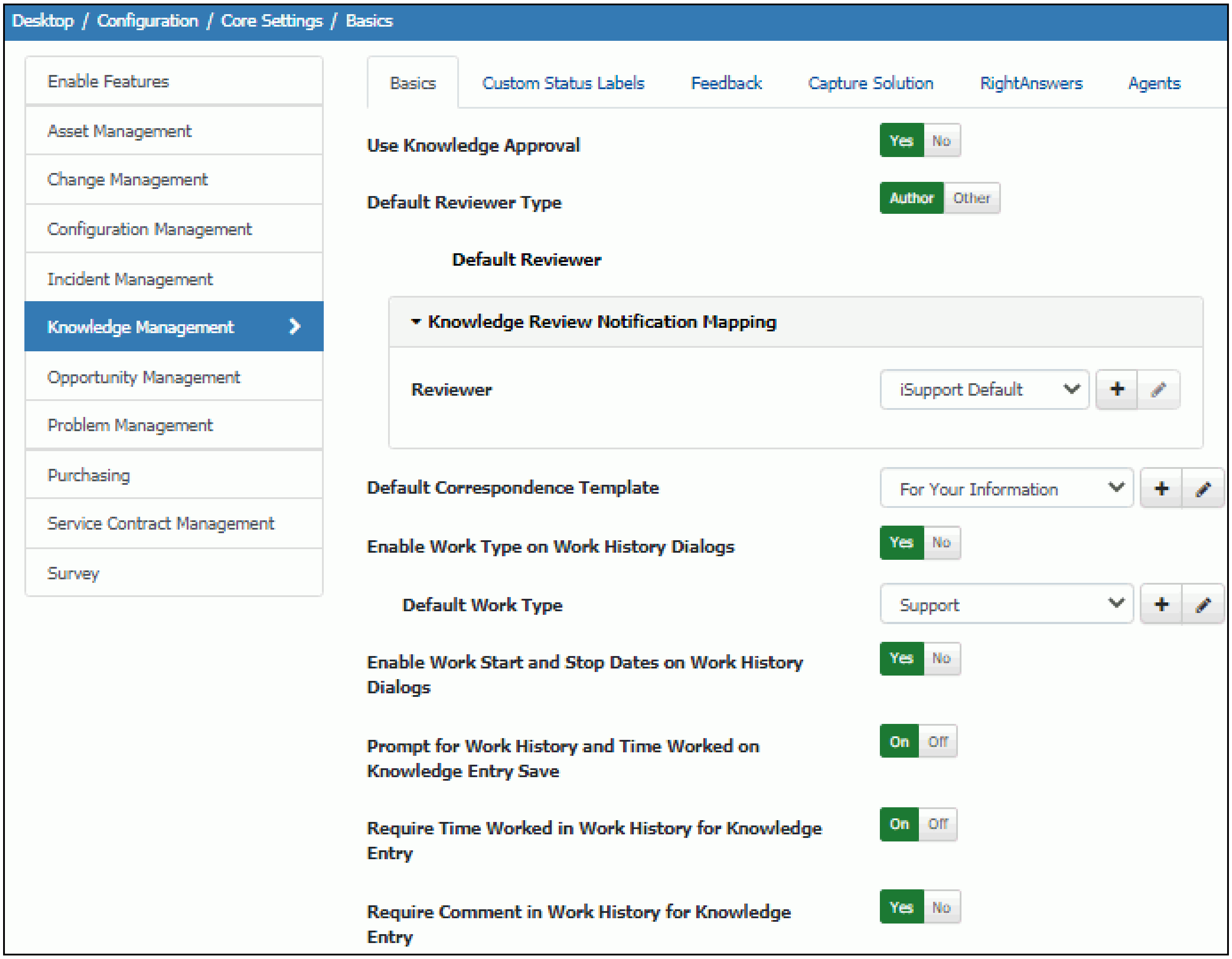
- You can perform knowledge entry searches based on categorization in the Incident screen; when a knowledge entry is found, the Capture Solution feature will paste the issue description and resolution from the knowledge entry into the record. See the online help for more information.
- You can enable an approval workflow with status levels to ensure accurate and complete knowledge entries. Default approval status levels are In Progress, Approved External, Approved Internal, Pending Approval, and Declined; enable approvals and customize these levels in Feature Basics. See "Configuring Knowledge Basics" on page 3. Once approvals are enabled, you can enable support representatives to be approvers via the Support Representatives screen.
- You can use Knowledge rules to automatically change field values on Knowledge records and create incidents and changes with an applied template. See "Configuring Rules and Rule Groups for Knowledge Entries" on page 29.
- You can display knowledge entries on mySupport portals via a Knowledge Base component with Most Popular, Newest, and Category sections; the knowledge entry display screen layout can be customized. Customers can follow and "like" knowledge entries, and post comments on knowledge entries to Facebook and discussion feeds. See the online help for more information.
- You can enable integration with RightAnswers, which enables support representatives to access subscription-based knowledge content for common PC hardware, software, and network issues. (RightAnswers is a third party application.) Contact iSupport Technical Support for assistance if you have purchased RightAnswers.
- You can use webhooks to post Knowledge data to a web application via Knowledge rules. See "Configuring Webhooks" on page 47.

Managing Knowledge Entries

You can use the Action menu in the View component on the Desktop to perform actions such as opening or deleting multiple entries. See the online help for more information.

Configuring Knowledge Basics

Use the Knowledge Basics screen to enable approval, RightAnswers, and custom status options.



Use Knowledge Approval - Select Yes to enable knowledge approval functionality. Knowledge entries can be designated with the following default statuses; custom labels can be configured for these status labels.

- **In Progress** saves the entry in a draft form.
- **Approved External** makes the knowledge entry available for viewing on the Desktop and mySupport portal, as well as the Incident, Problem, and Change (if enabled) screens.
- **Approved External - Requires Authentication** includes the knowledge entry on the mySupport portal only for authenticated users.
- **Approved Internal** makes the knowledge entry to be available for viewing on the Desktop and Incident, Problem, and Change screens.
- **Pending Approval** includes the entry in the Pending Approval folder in the Knowledge view on the Desktop.
- **Declined** includes the entry in the Declined folder in Knowledge views on the Desktop so that the submitter can view, edit, and resubmit it if necessary.

After a knowledge entry is approved, only those designated as an approver can update it. If approvals are disabled, you can select Approved External, Approved External - Requires Authentication, or Approved Internal, or In Progress in the Status field.

Support representatives are designated as knowledge approvers in the Rep Profile screen.

Default Reviewer Type - Select the type of reviewer to populate the Reviewer field in the Knowledge Entry screen by default: the author or a selected support representative. The reviewer will be sent a notification that will function like the current Followup feature; the Knowledge Entry Review agent will look for entries that match the review date specified in a knowledge entry and send a newsletter-style email to the reviewer. Like the Followup feature, if you use a custom notification it sends an individual email for each knowledge entry instead of the newsletter style.

Default Reviewer - If Other was selected in the Default Reviewer type field, select the support representative to populate the Reviewer field in the Knowledge Entry screen.

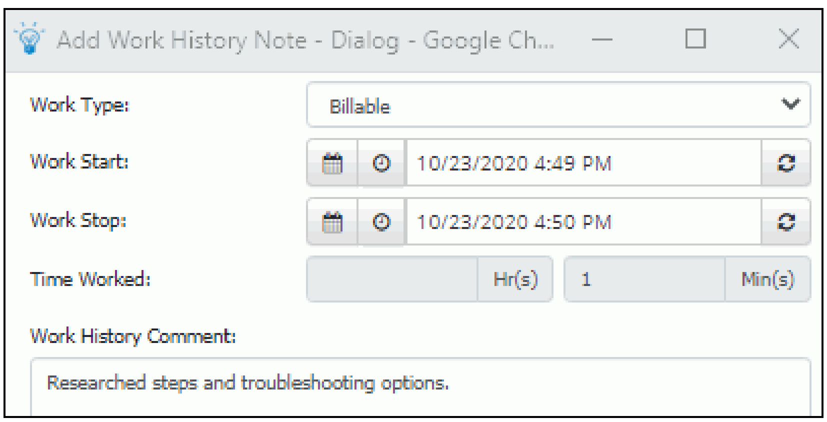
Recipient Notification Mappings - Select the notification to be sent to the reviewer or select Create New to access the Custom Notification screen. The Knowledge Entry Review agent (specified on the Agents tab) will search for entries that match the review date specified in a knowledge entry and send a notification to the reviewer. If the iSupport Default notification is used, a newsletter-style email will be sent; if a custom notification is used, a notification will be sent for each knowledge entry.

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

Enable Work Type on Work History Dialogs - Select Yes to include a Work Type field in the Work History dialog in the Knowledge Entry screen. See "Configuring Work History Types" on page 46 for information on configuring work history types.

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 configuration screen.

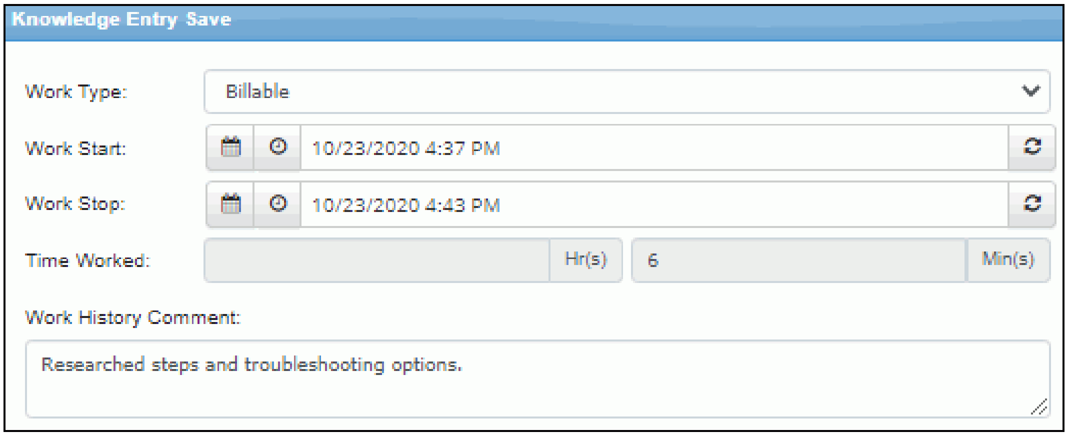
Enable Work Start and Stop Dates on Work History Dialogs - Select Yes to include Work Start and Work Stop fields in the Work History and Save dialogs in the Knowledge Entry screen.



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 knowledge entry 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 Knowledge Entry Save - Select Yes to display the Save dialog every time a support representative saves a knowledge entry

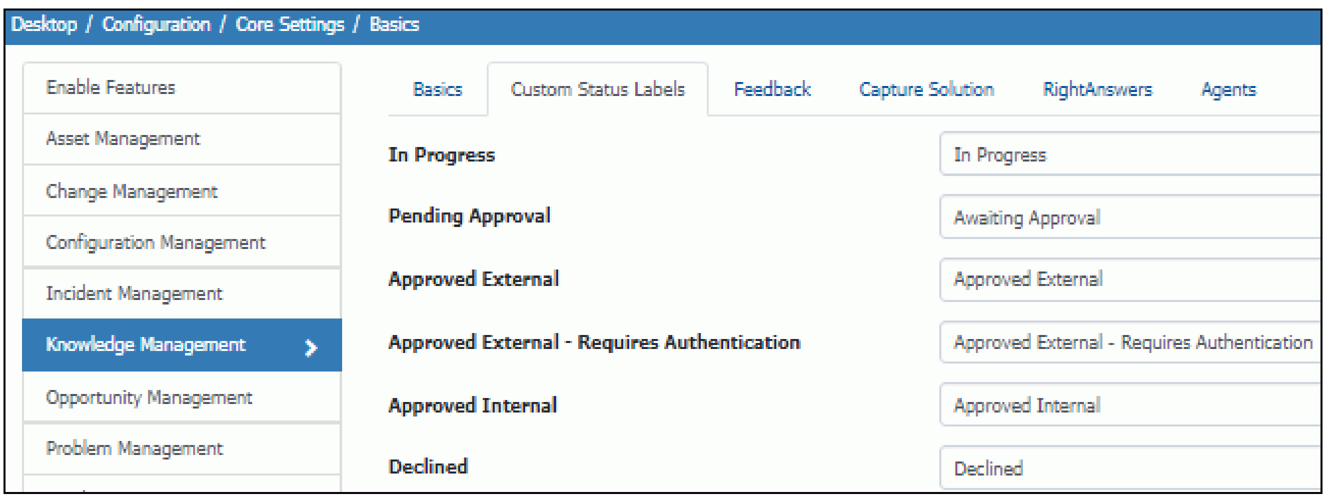


Require Time Worked in Work History for Knowledge Entry - Select Yes to require an entry in the Time Worked field in the Save dialog before the record can be saved in the Knowledge Entry screen.

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

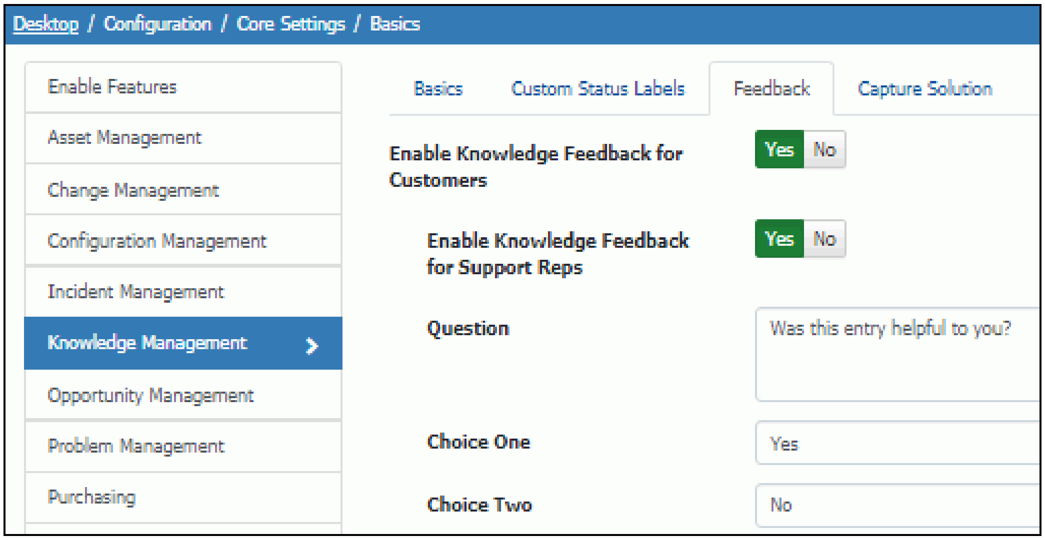
Configuring Custom Status Labels for Knowledge Entry Statuses

Use the Custom Status Labels tab to enter custom status labels for the knowledge statuses of In Progress, Pending Approval, Approved External, Approved External – Requires Authentication, Approved Internal, and Declined.

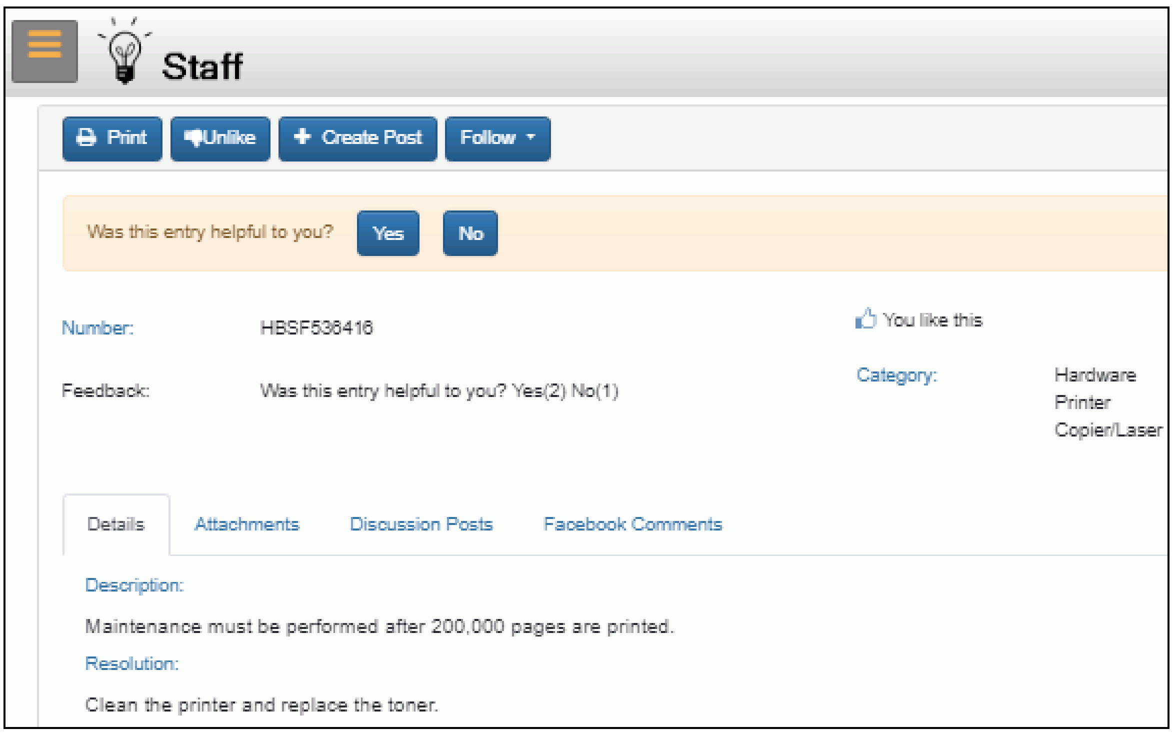


Configuring Knowledge Feedback Options

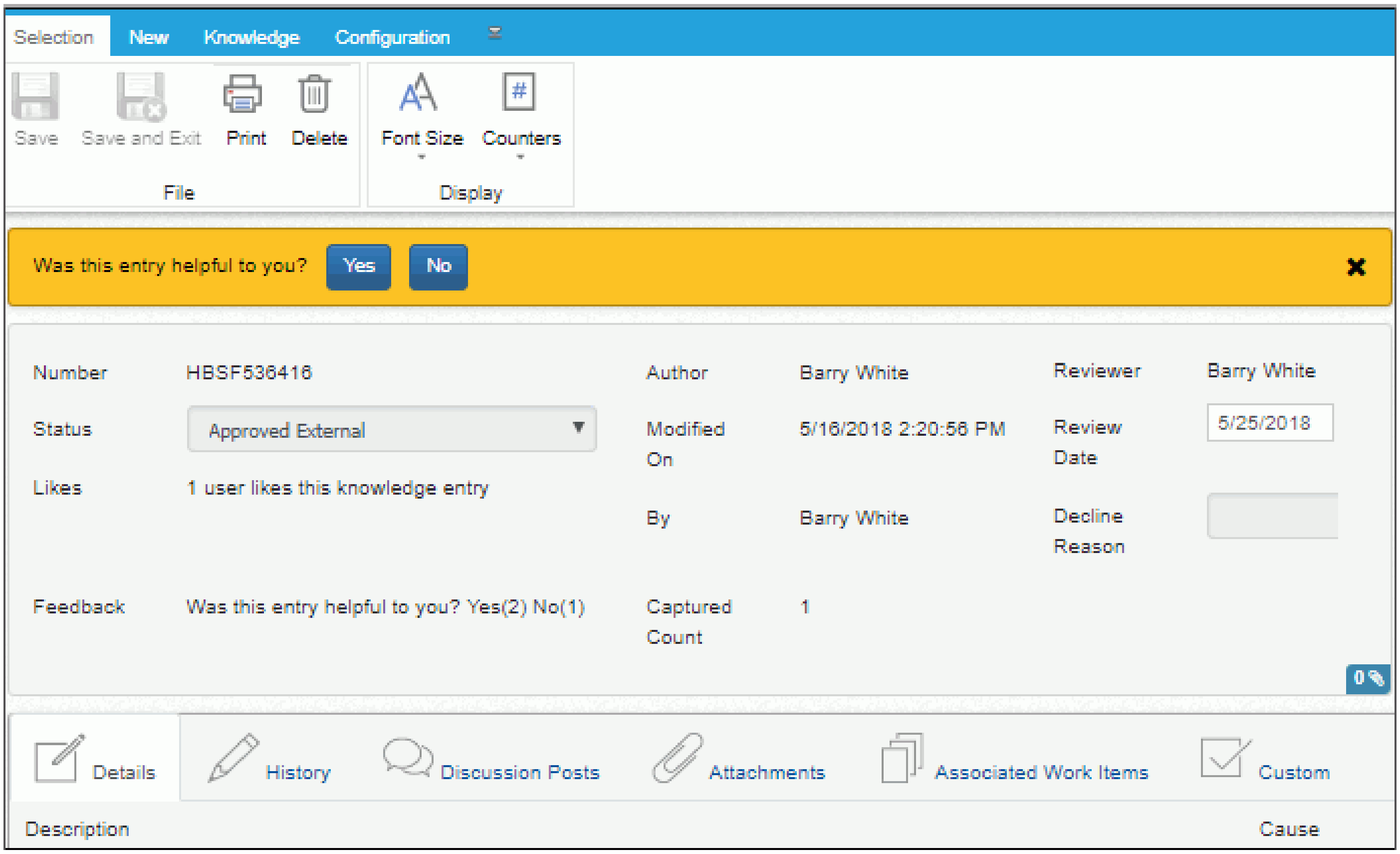
Enable Knowledge Feedback for Customers - Select Yes to include a question with two response choices at the top of the knowledge entry screen on mySupport, and if enabled, to support representatives. You can add the Feedback field to a knowledge layout to display the number of responses for each choice, and use the Knowledge Feedback data source in the view designers to build views for knowledge feedback data.



An example of a configured question and the Feedback field is shown below.



Allow Support Reps to Respond - Select Yes to display the question and response choices at the top of the Knowledge Entry screen accessed via the Desktop.



Question - Enter the question text to be included at the top of the Knowledge Entry screen.

Choice One - Enter the text for the first response choice.

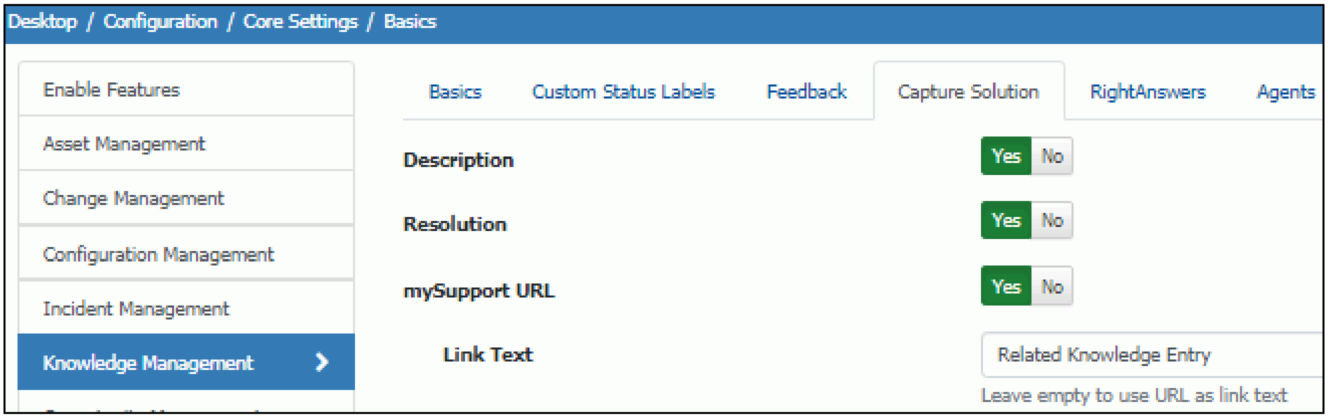
Choice Two - Enter the text for the second response choice.

Feedback Submitted Message - Enter the text to appear after the user clicks on a feedback choice.

Configuring Capture Solution Settings

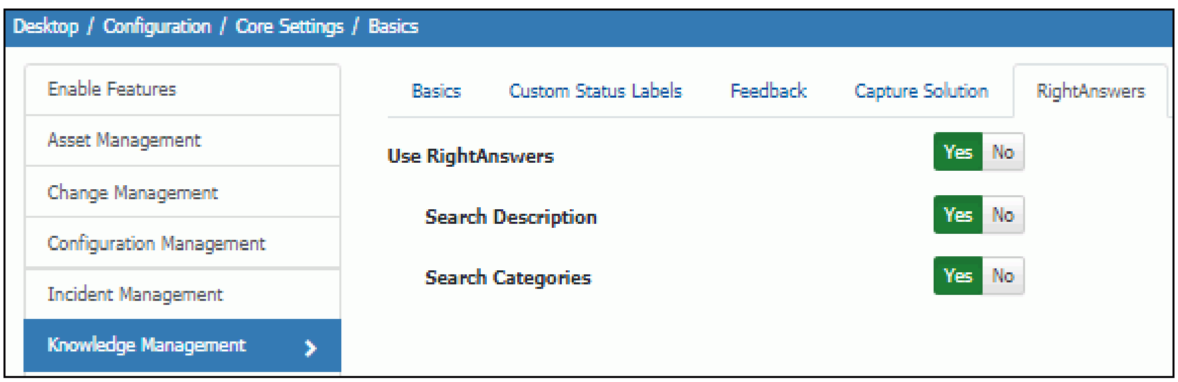
iSupport's Capture Solution feature enables you to display and copy/paste information from a knowledge entry matching the selected category set into related fields in an incident. These entries will appear in the view frame at the bottom of the screen automatically (if configured in the category configuration screen) or after the View | Knowledge option is selected in the Incident screen. Note that the Capture Solution feature does not retain any images inserted via the toolbar in the Knowledge Entry screen.

On the Capture Solution tab in the Knowledge Management Basics screen, select Yes in the fields from which information can be copied when the Capture Solution feature is used in the Incident screen. If the mySupport URL field is enabled, you can use the Link Text field to enter clickable text that will appear in place of the mySupport URL.



Setting Right Answers Options

Use the RightAnswers tab to enable integration with RightAnswers, which enables support representatives to access subscription-based knowledge content for common PC hardware, software, and network issues. RightAnswers is a third party application integrated with but not included in iSupport. Contact iSupport Technical Support for assistance if you have purchased RightAnswers.

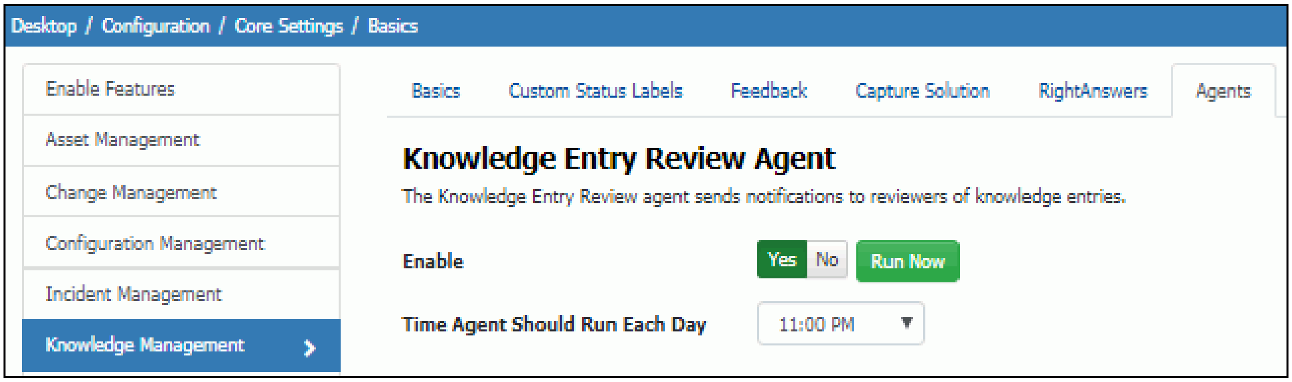


Use Right Answers - Select Yes to enable RightAnswers functionality.

> **Search Description** - Select Yes to include the incident's description in the search query when a support representative uses the RightAnswers feature in the Incident screen.
>
> **Search Categories** - Select Yes to include the incident's category set in the search query when a support representative uses the RightAnswers feature in the Incident screen.

Scheduling the Knowledge Entry Review Agent

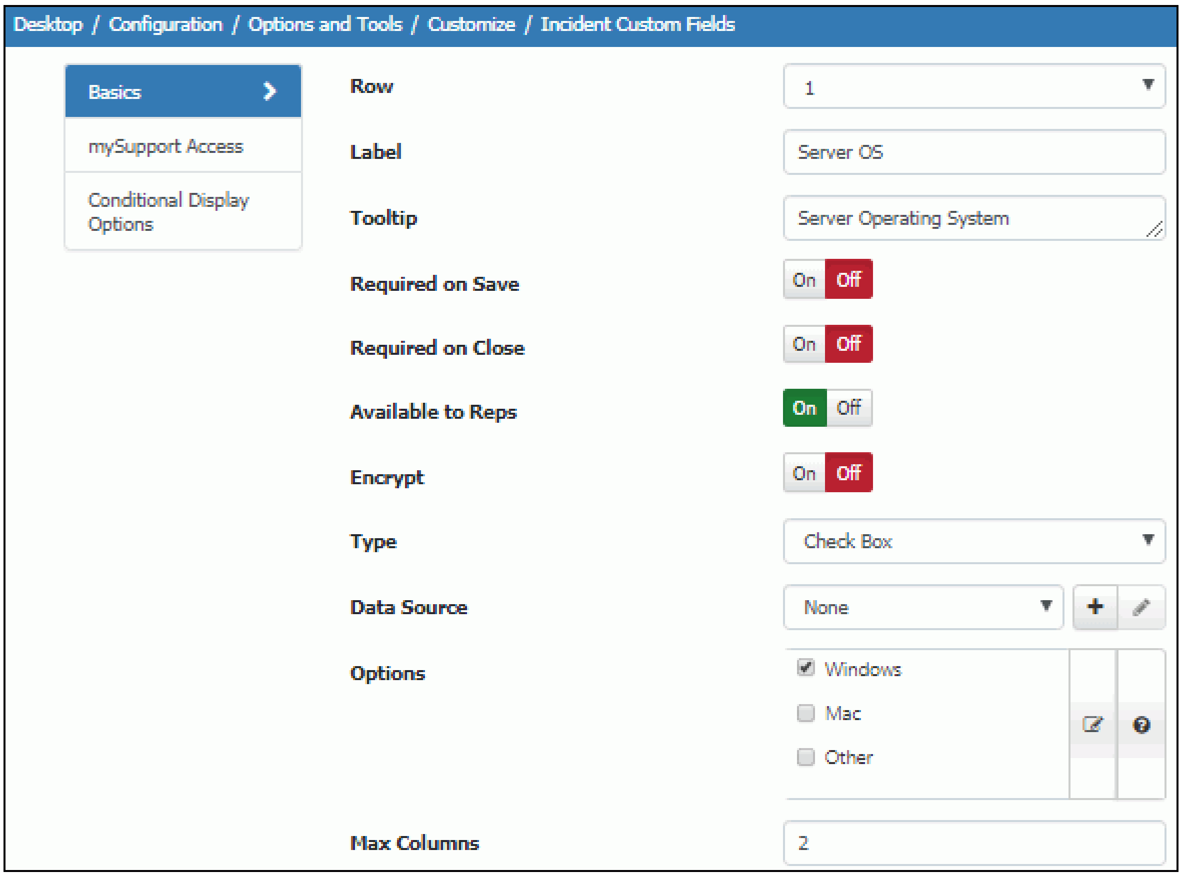
Select Yes to enable the Knowledge Entry Review agent to search for entries that match the date review date specified in a knowledge entry and send a notification to the reviewer. If the iSupport Default notification is used, a newsletter-style email will be sent; if a custom notification is used, a notification will be sent for each knowledge entry. After selecting Yes, use the Time Agent Should Run Each Day field to select the time the agent should run.



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.

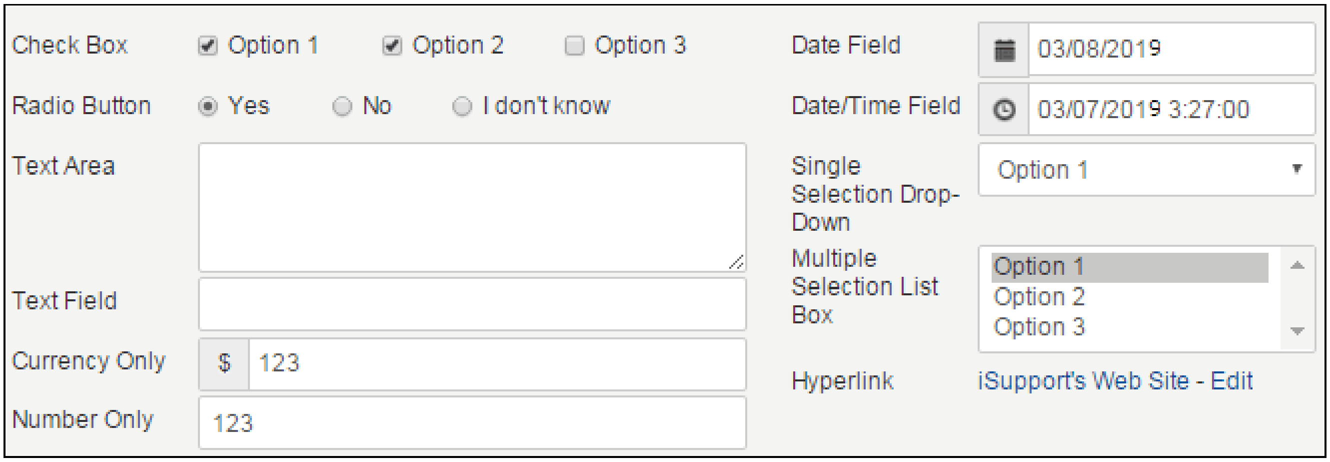
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see "Pulling From a Data Source" on page 15 for more 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 15 for more information.

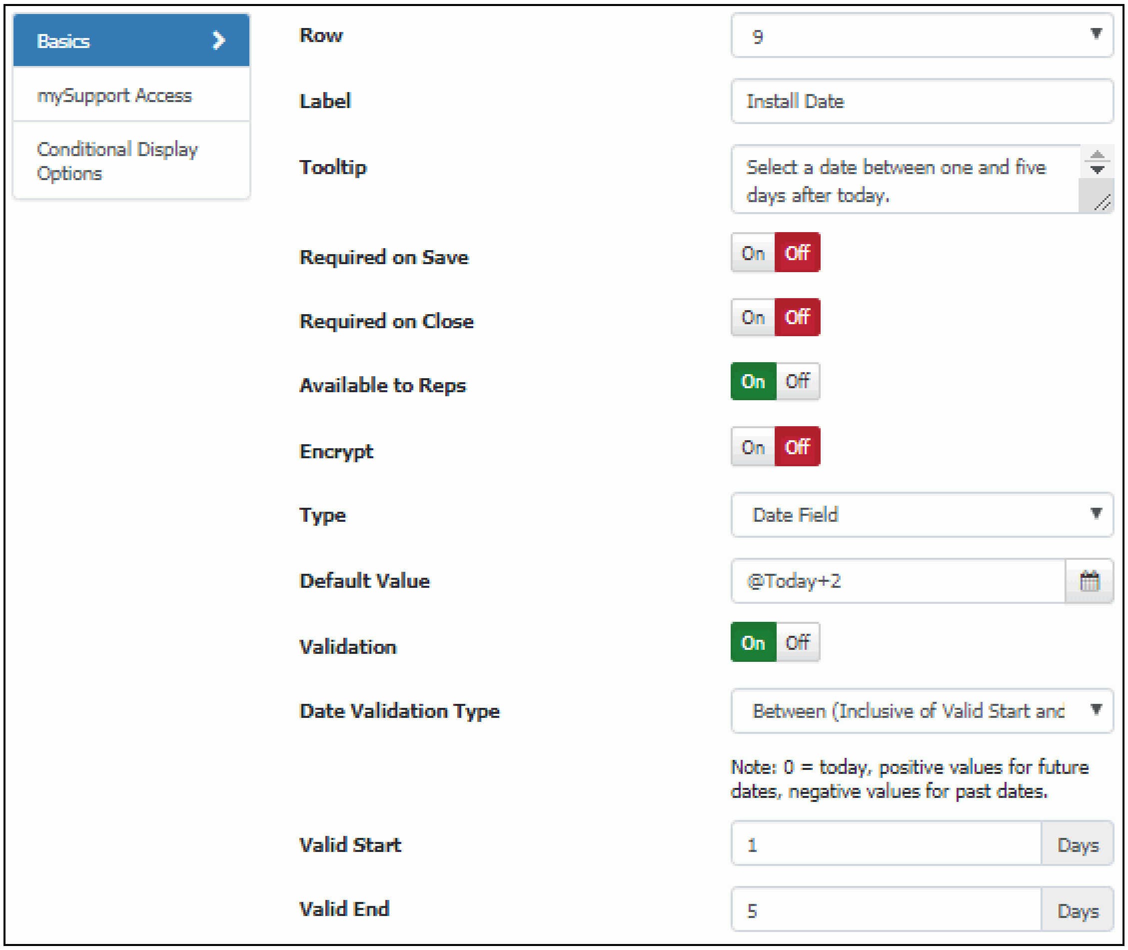
Default Value - Enter a value to appear as an option in the custom field by default.

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

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

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

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



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

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

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

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

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

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

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

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

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

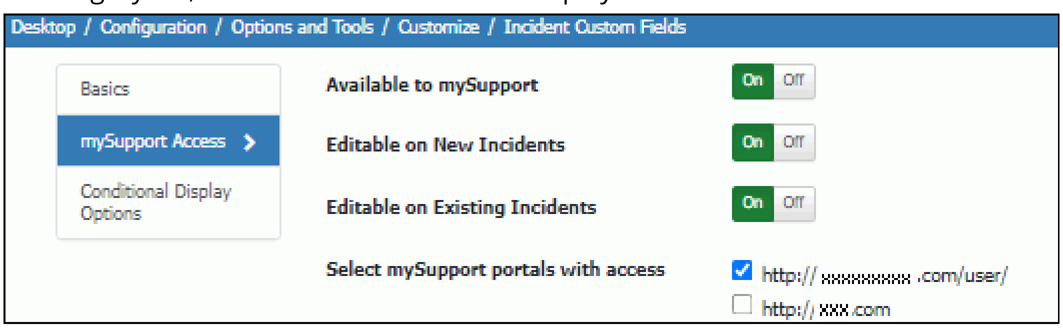
mySupport Access Options

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

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

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

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

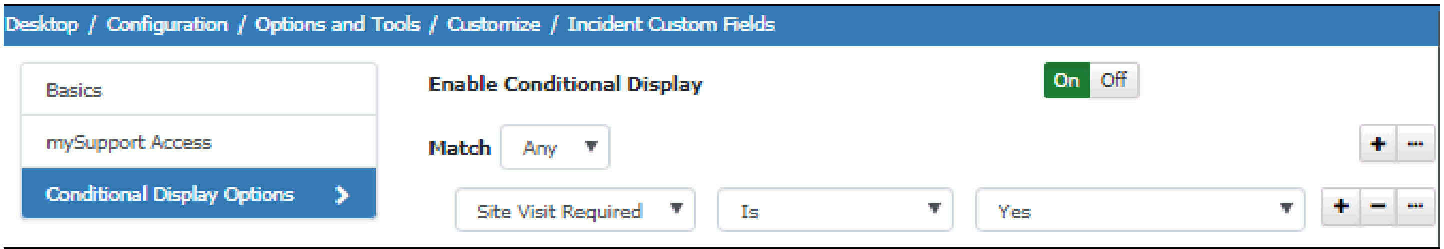


Setting Advanced Options

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

Conditional Display Options

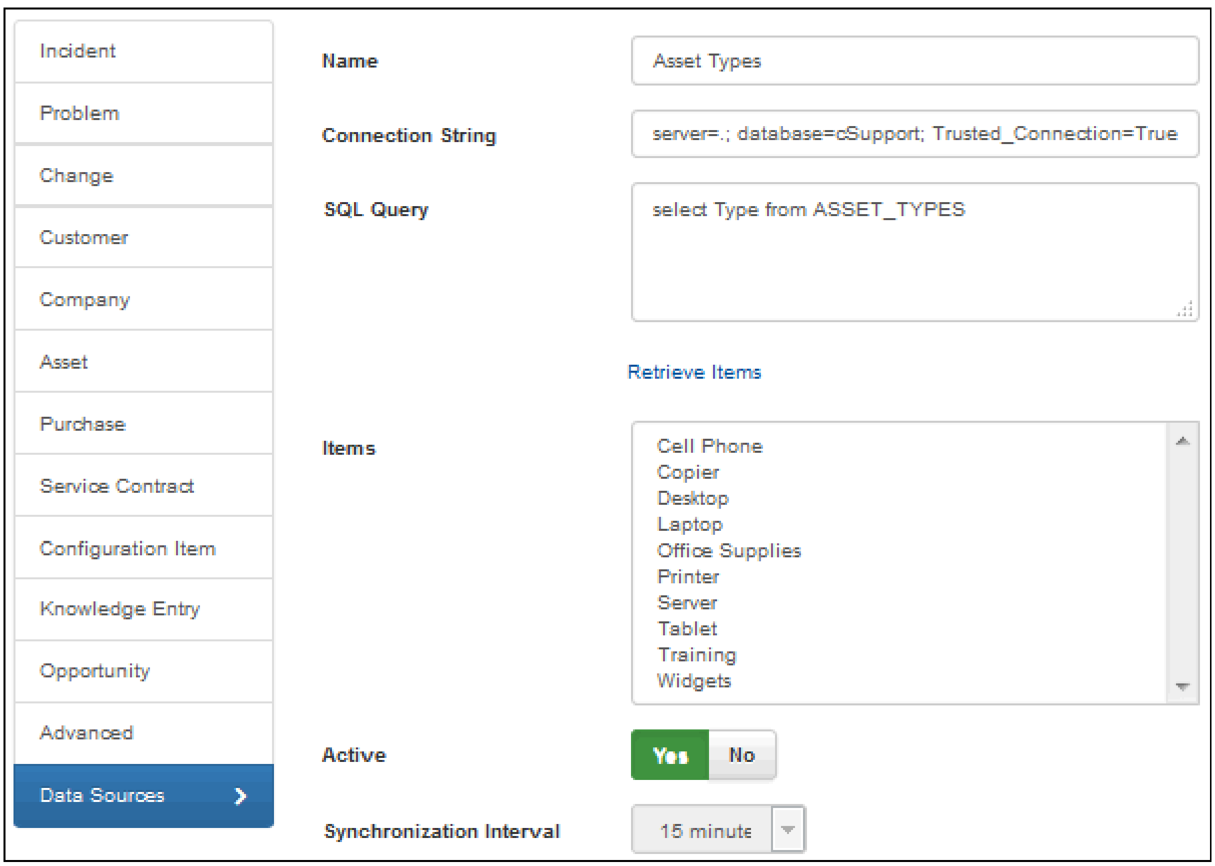
Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.



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

Pulling From a Data Source

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



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

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

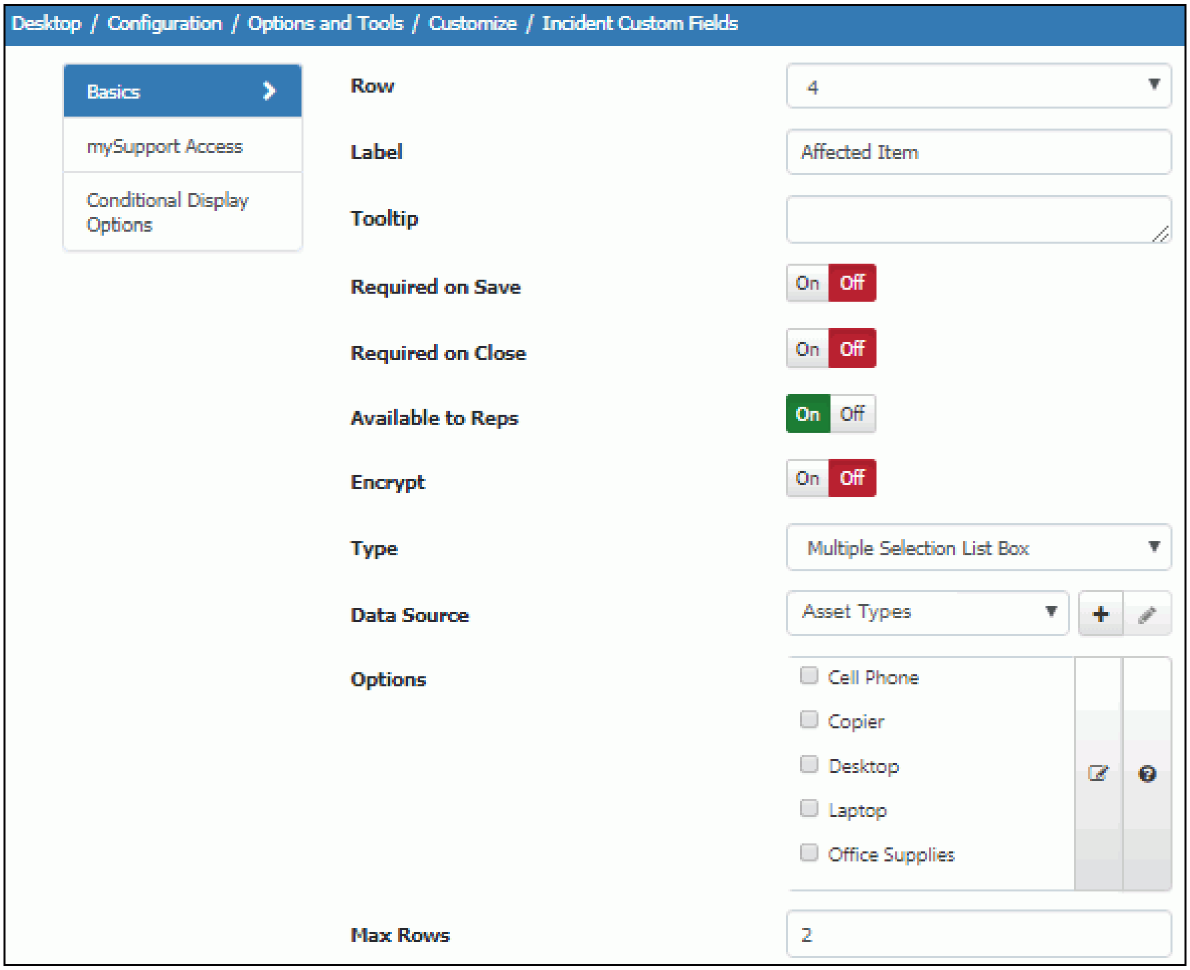
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Select the Retrieve Items button to populate the Items field using this string.

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

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

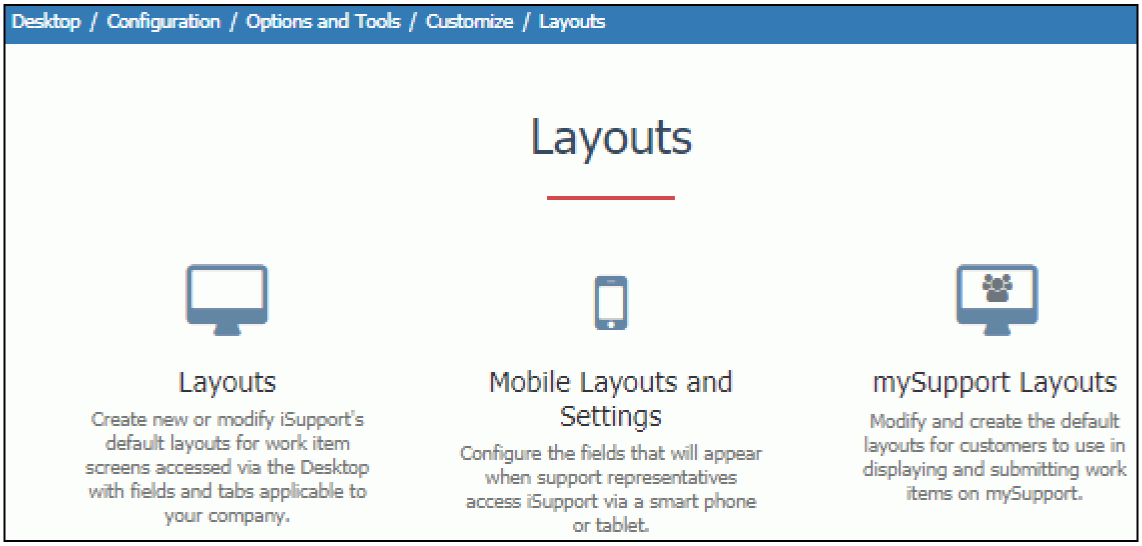
Using the Data Source for a Custom Field

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



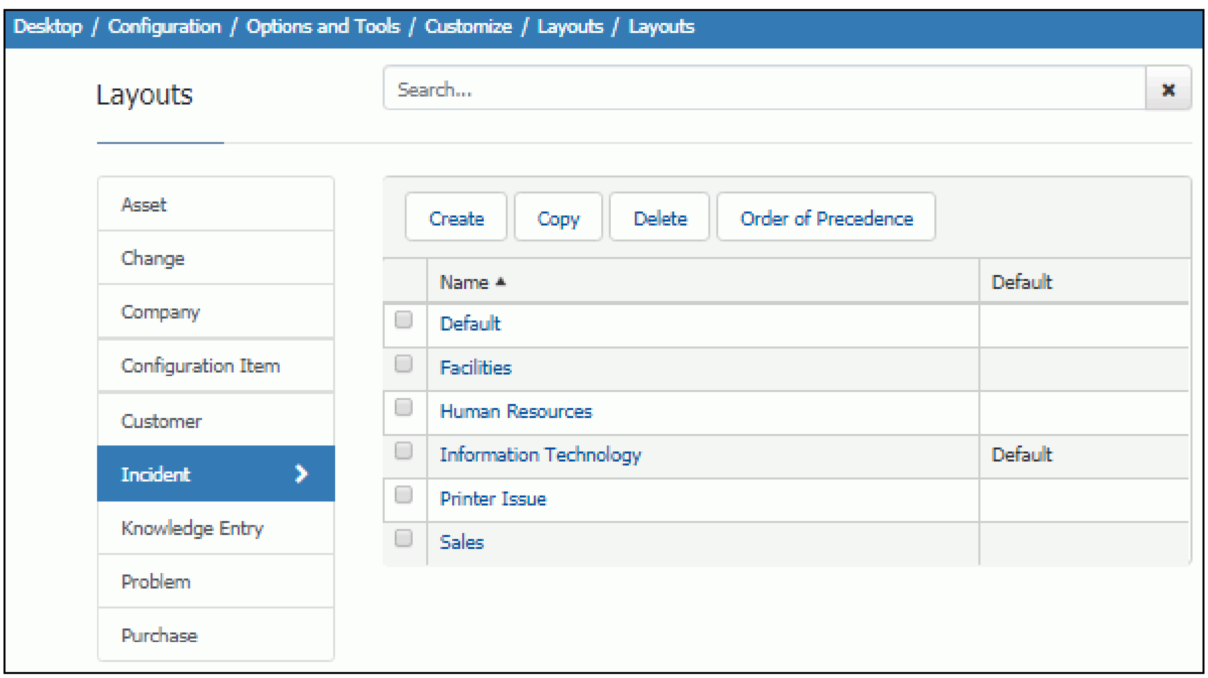
Configuring Screen Layouts

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



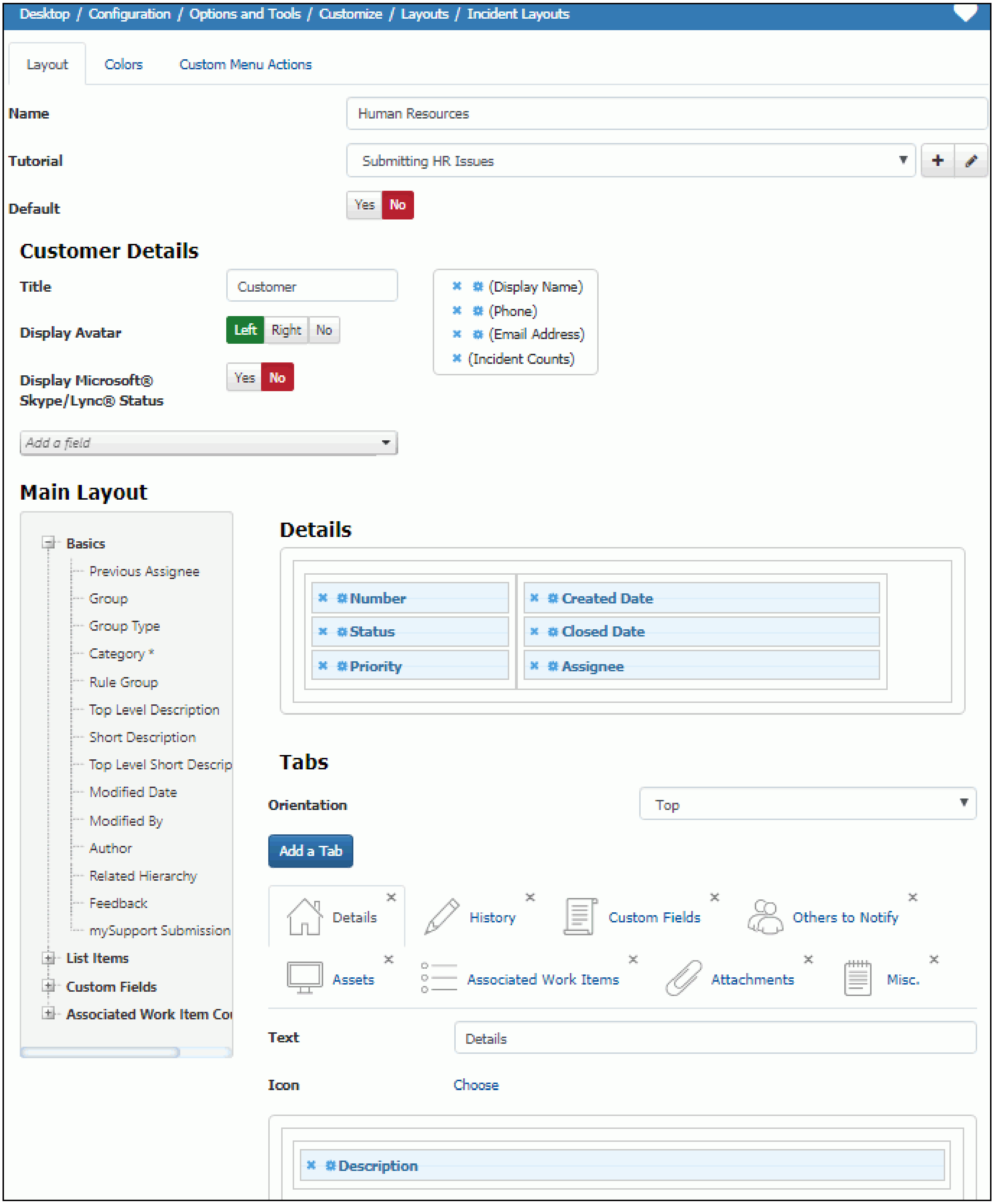
Note that only layouts configured via the Global Settings | Mobile Settings screen will apply to the mobile HTML5 interface. Also, mySupport Customer layouts will appear when the customer selects the View Complete Profile button in the Account Settings screen on a mySupport portal.

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



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

The Layout screen is shown below.



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

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

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

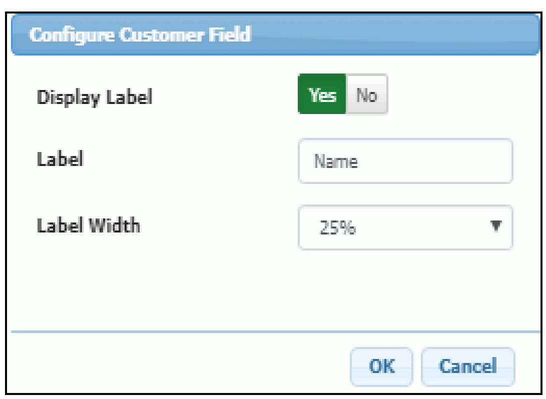
Configuring Customer Details

Rep Incident and Change Screens

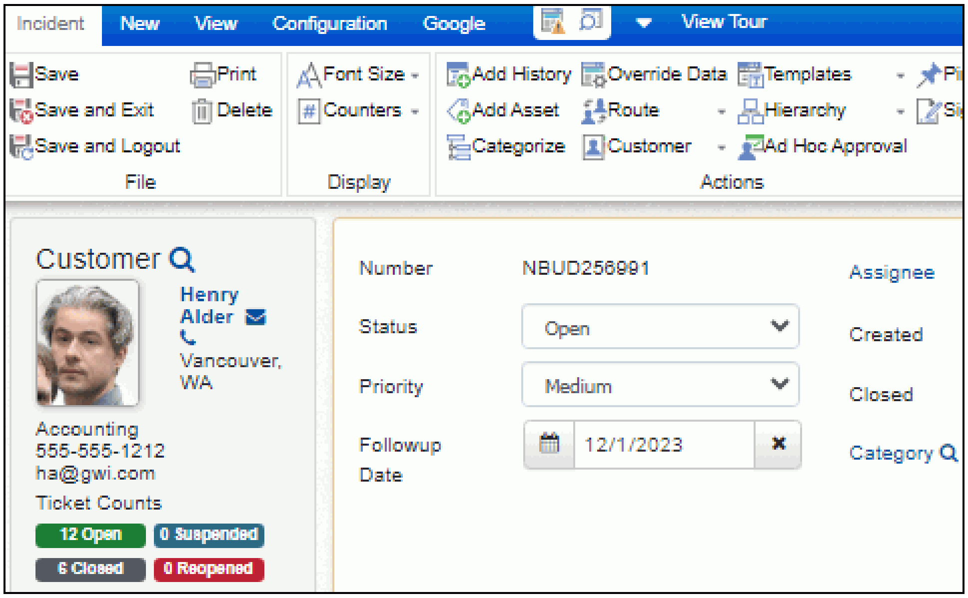
The Customer Details section will appear in the Rep Incident and Change Layout configuration screens as shown below.

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

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



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

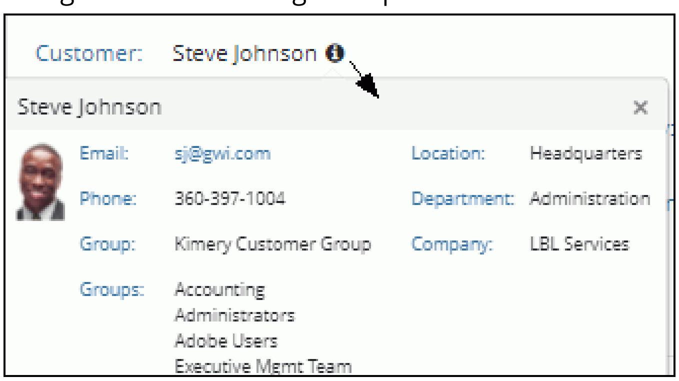


Use the **Display Microsoft® Skype/Lync® Status** field to include an icon that will display the Microsoft Skype/Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Skype/Lync functions. In order for the icon to appear, Microsoft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

mySupport Incident and Change Screens

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

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

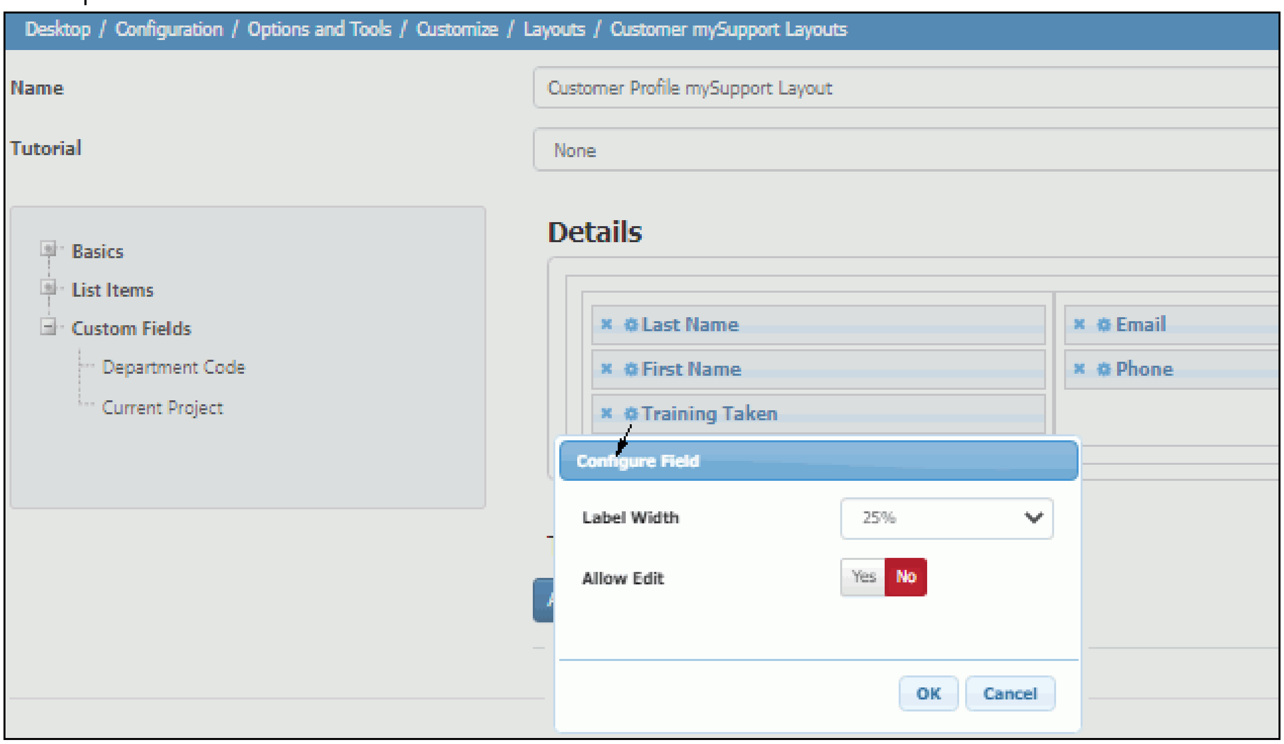


- Individual fields under the Customer Fields section

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

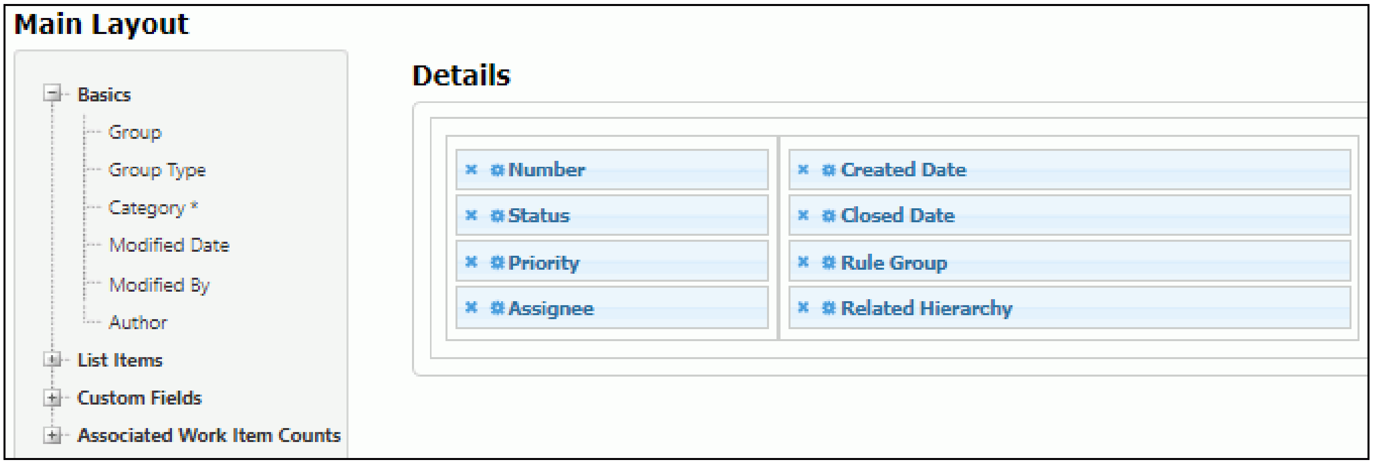
mySupport Customer Profile Custom Field Edit Access

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

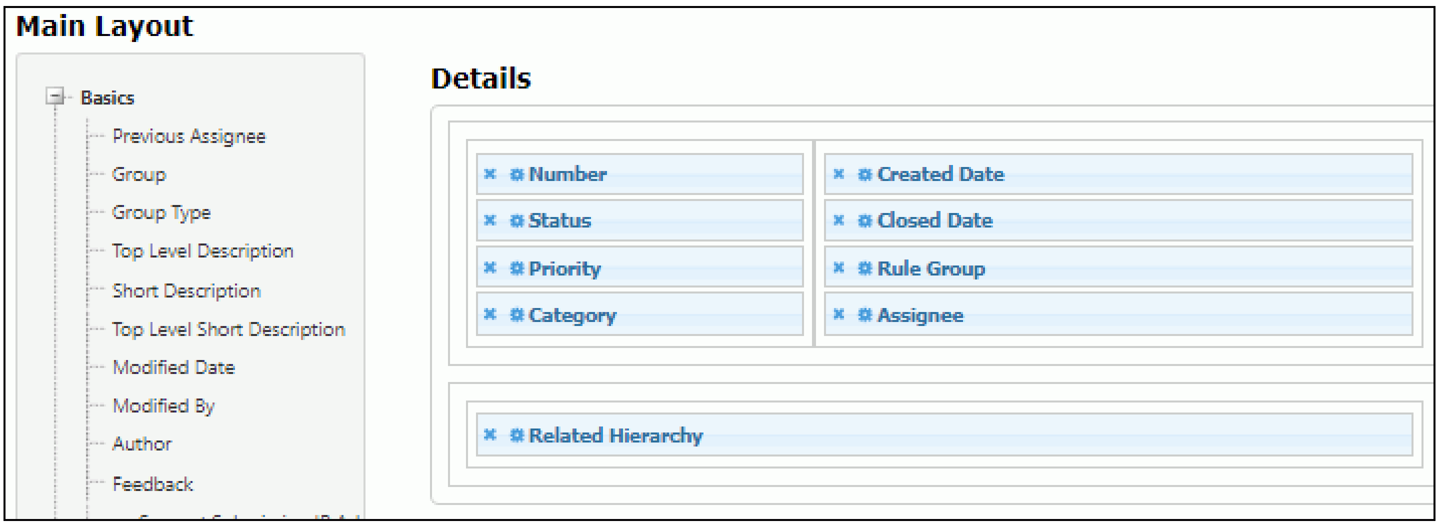


Adding Fields and Tabs

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

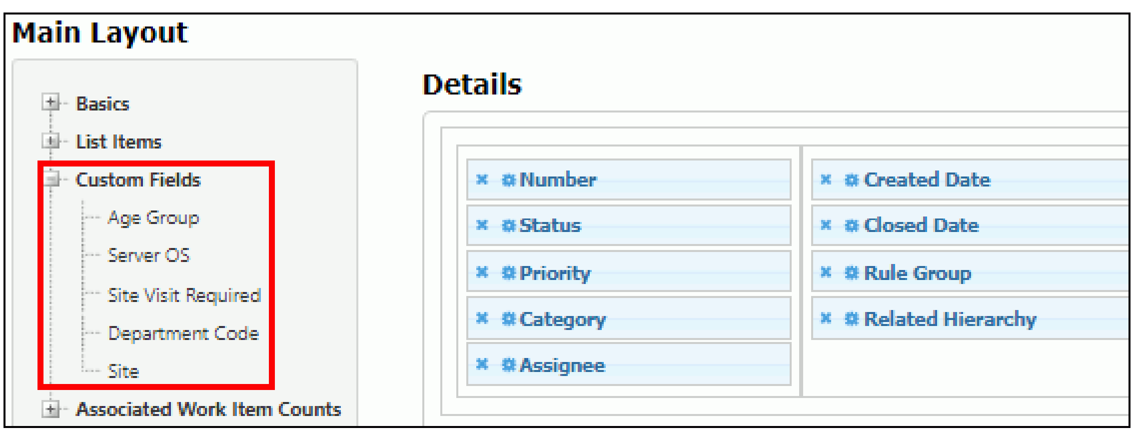


You can drag a field to the lower part of the Details section to create a subsection for a field.

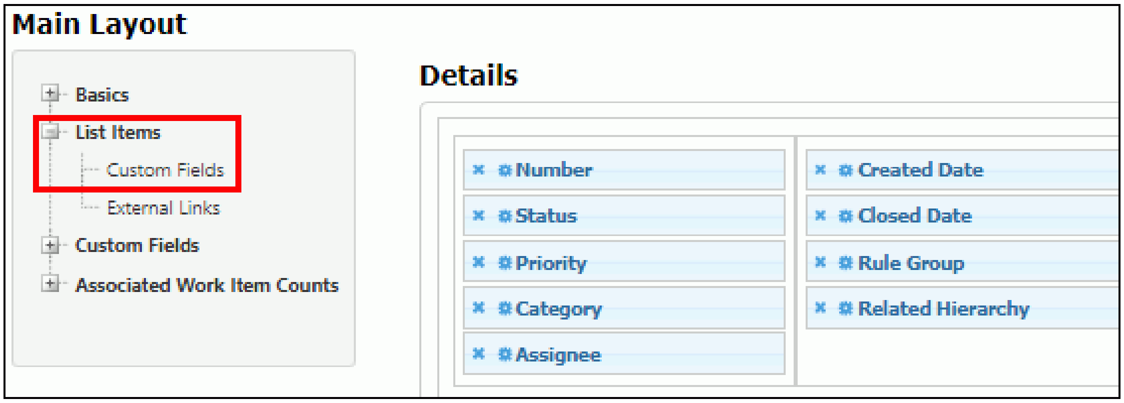


Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, or CI type. To include custom fields on a layout, you can:

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

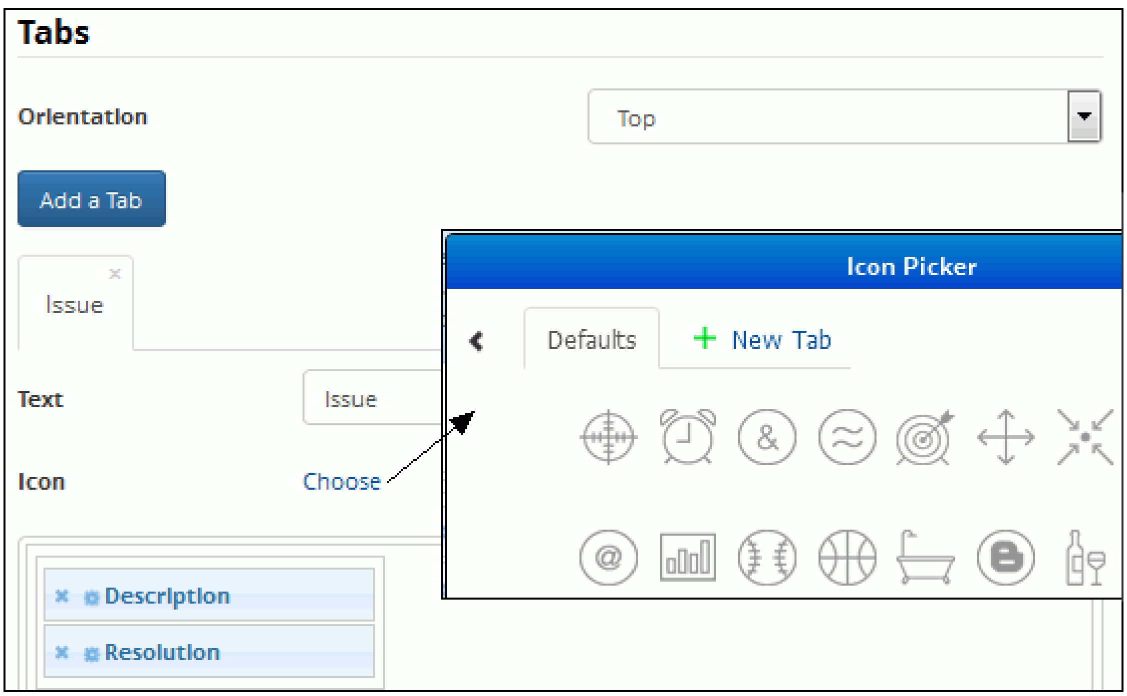


- Drag the Custom Fields field under the List Items section and then select Configure Field to display the Configure Field dialog and select the types of custom fields to include: global custom fields, additionally defined custom fields, or both. See “Configuring Fields” on page 24.

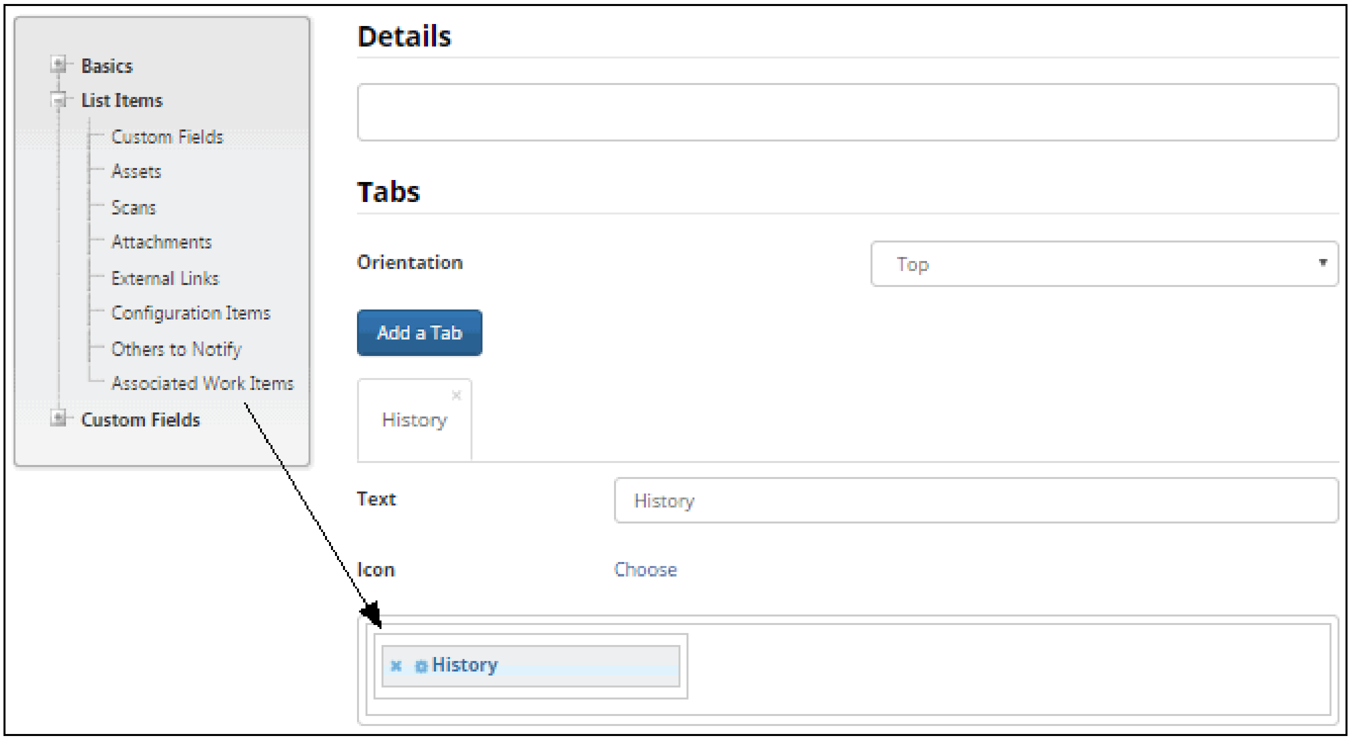


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

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



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

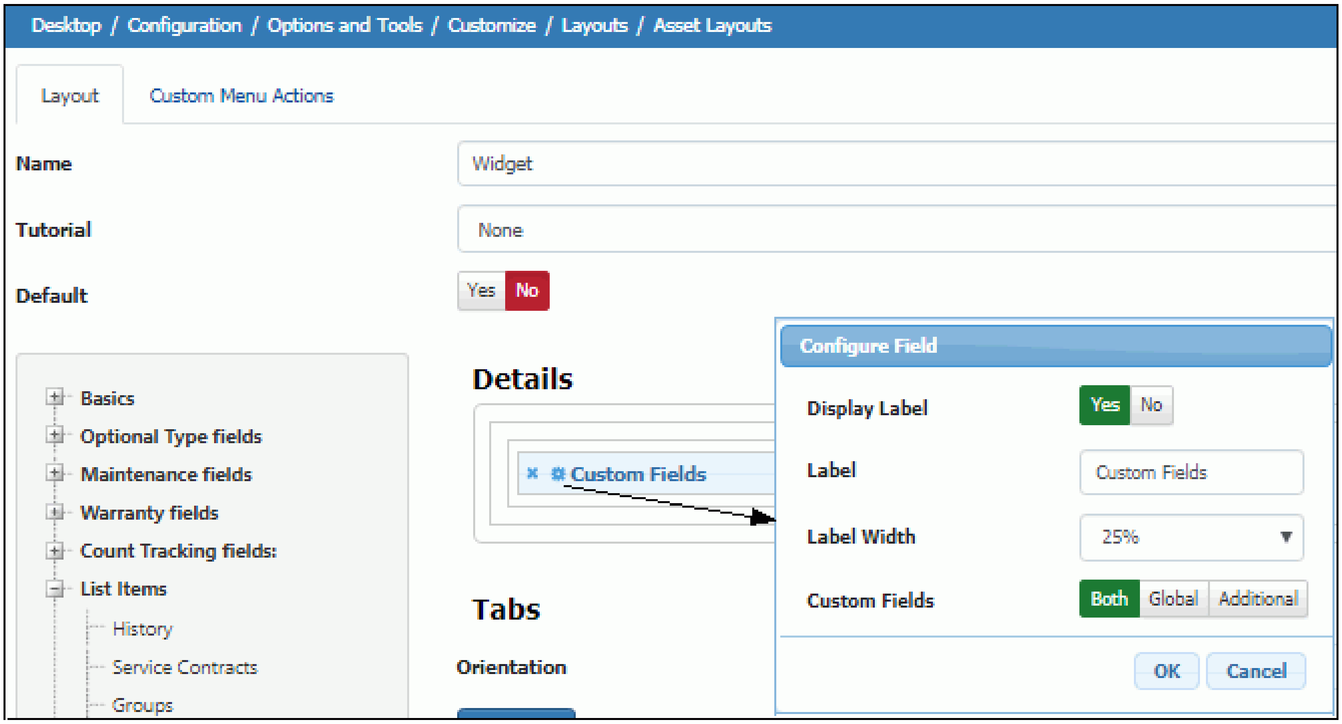


Note: The Description field is optional on mySupport incident submit layouts. The following text will be included in the Description field after submission: "Description field not included in <layout name> mySupport incident submit layout." If the layout is associated with a template, the description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

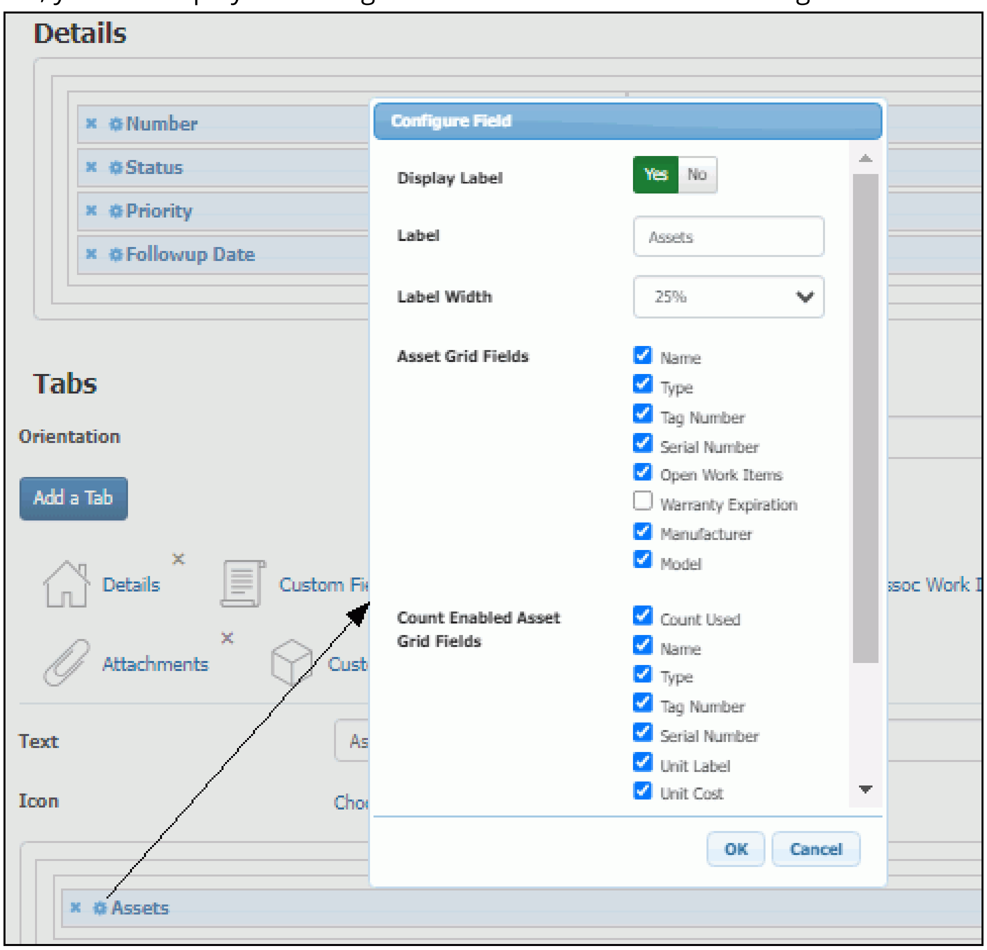
Configuring Fields

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

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

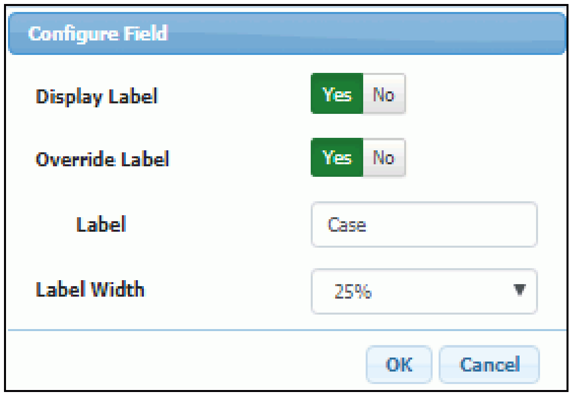


For work item layouts, you can display an asset grid for the Asset field via the Configure Field icon:

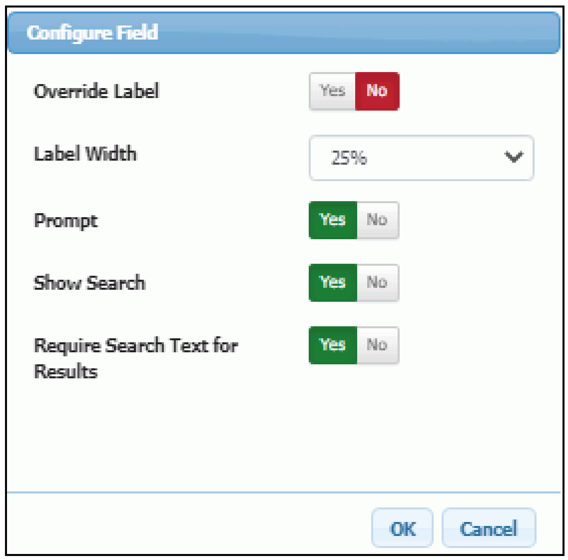


mySupport Layouts

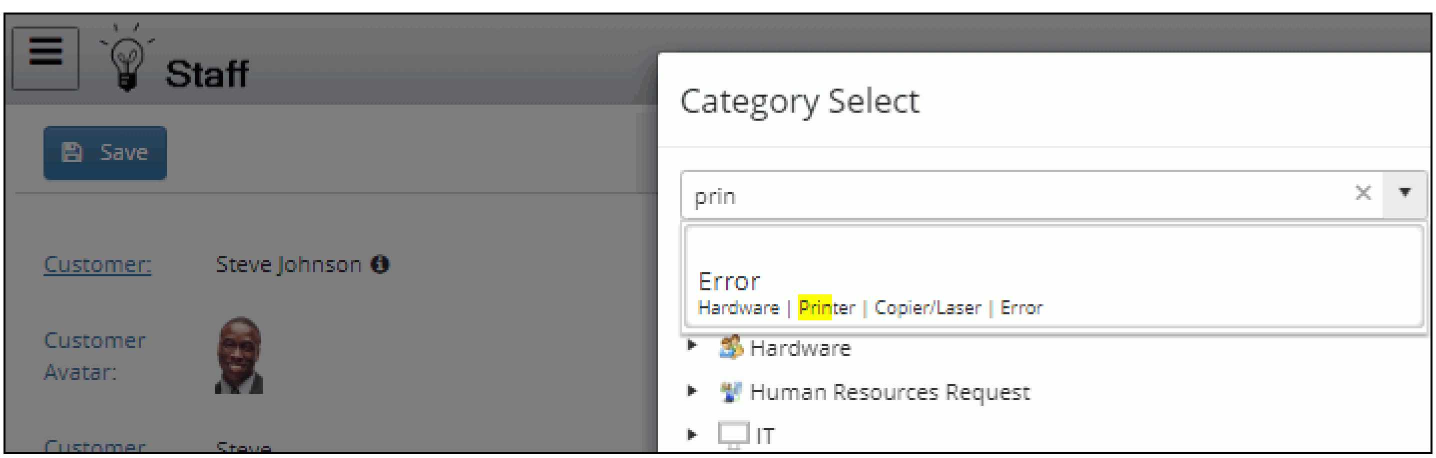
- Select Yes in the **Override Label** field to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



- If configuring the **Category** field:

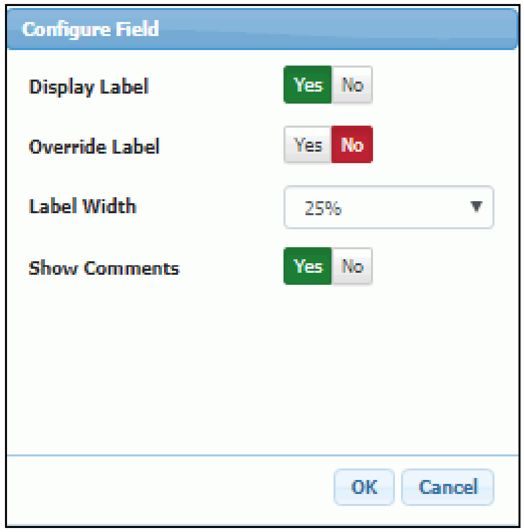


  - Select Yes in the **Prompt** field to initially display the Category Select dialog when the Incident or Change Submit screen appears.
  - Select Yes in the **Show Search** field to include a search field in the Category Select dialog.



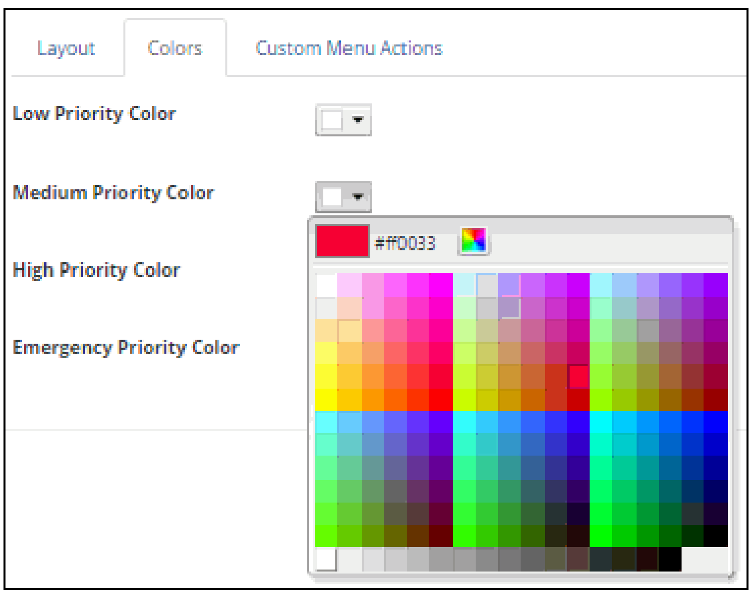
  - Select Yes in the **Require Search Text for Results** field to prevent display of the results until the user has started typing.

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



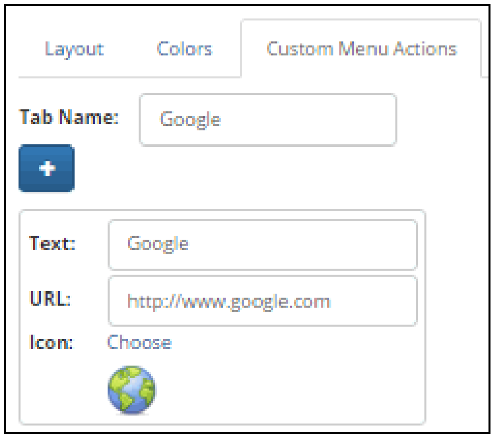
Configuring Priority-Based Background Colors

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

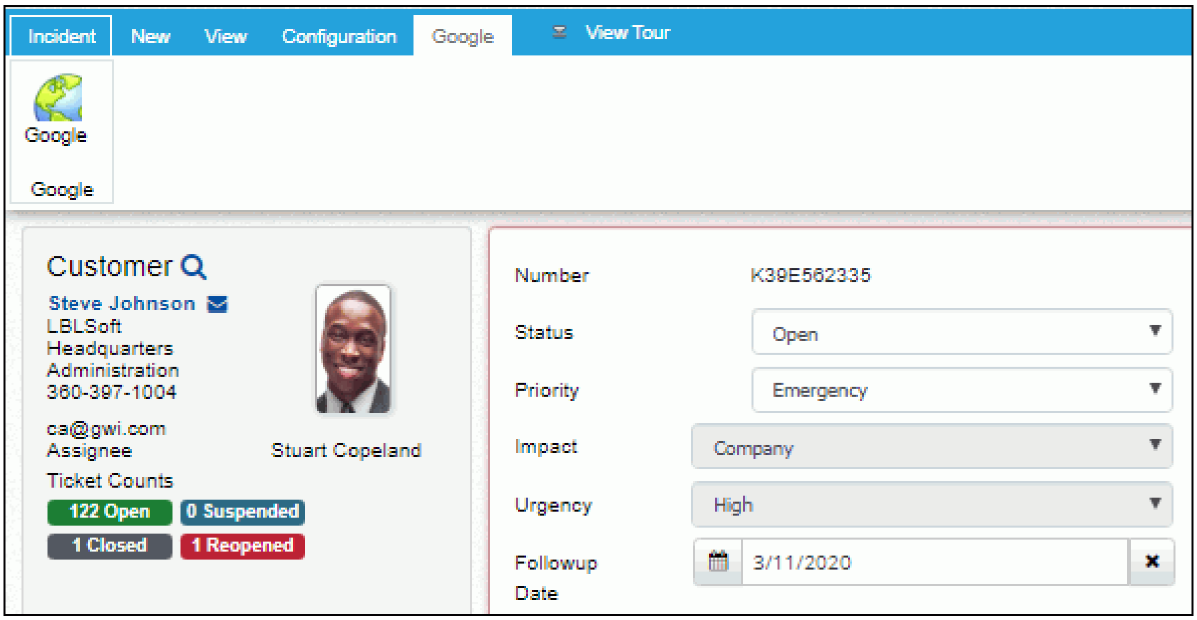


Configuring Custom Menu Actions

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



Example:



Configuring Rules and Rule Groups for Knowledge Entries

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

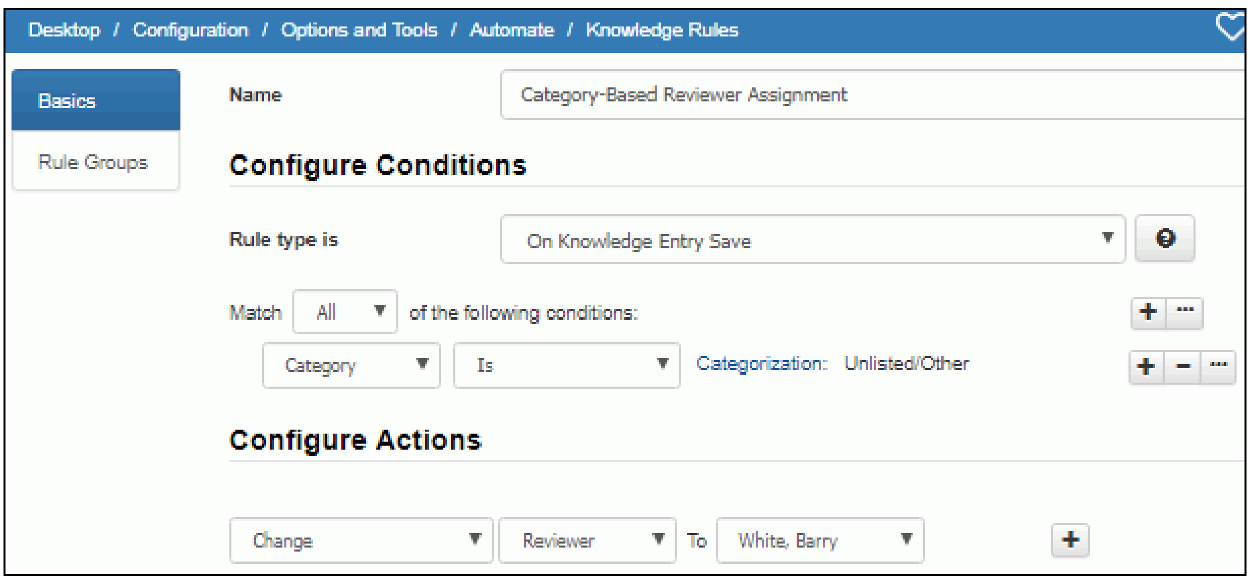
- Change values in the Category, Review Date, Reviewer, and Status fields, as well as in any custom fields
- Send notifications via email, Desktop notification, or SMS
- Create an incident or change and apply a template
- Execute a webhook for posting Knowledge data to a web application

In order for a rule to be evaluated, it must be included in a **rule group**; rule groups are applied to Rule groups are applied to knowledge entries through category combinations. (If no rule group is associated with the category combination, the default rule group will be applied.) When a knowledge entry 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.

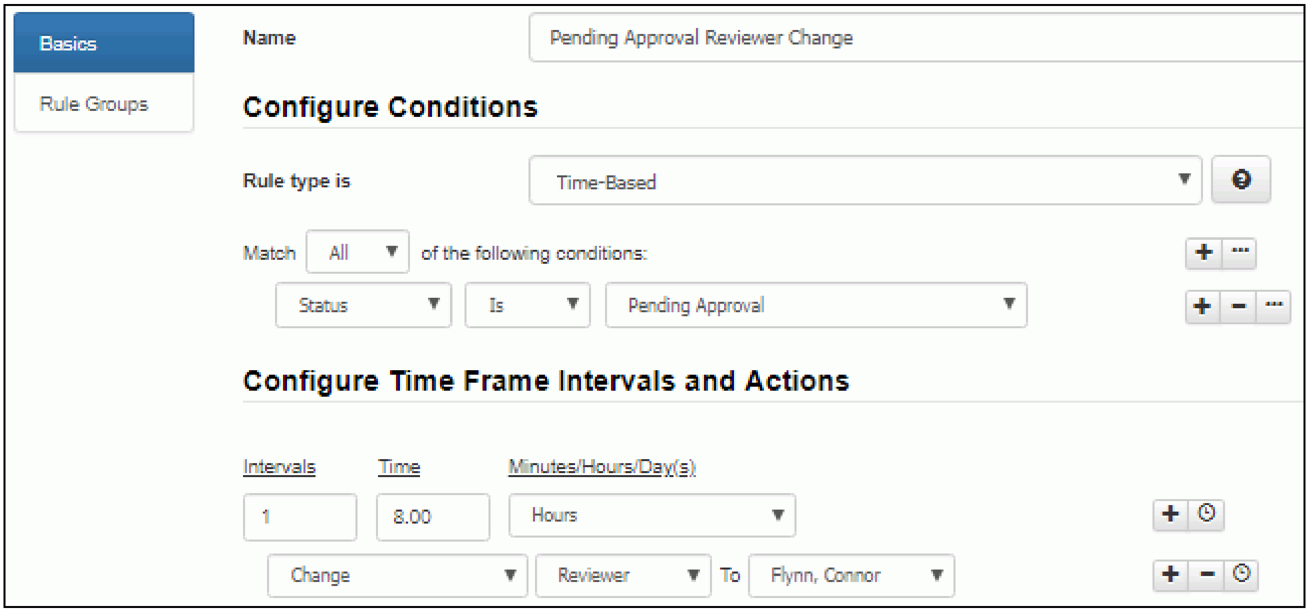
You can use the Knowledge Rule Groups screen to create new rule groups and assign them to category combinations. (You can also assign rule groups via the Category entry screen.) See "Creating Rule Groups" on page 38 for more information. A default knowledge rule group will be included in iSupport on installation or upgrade.

Rule Types

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

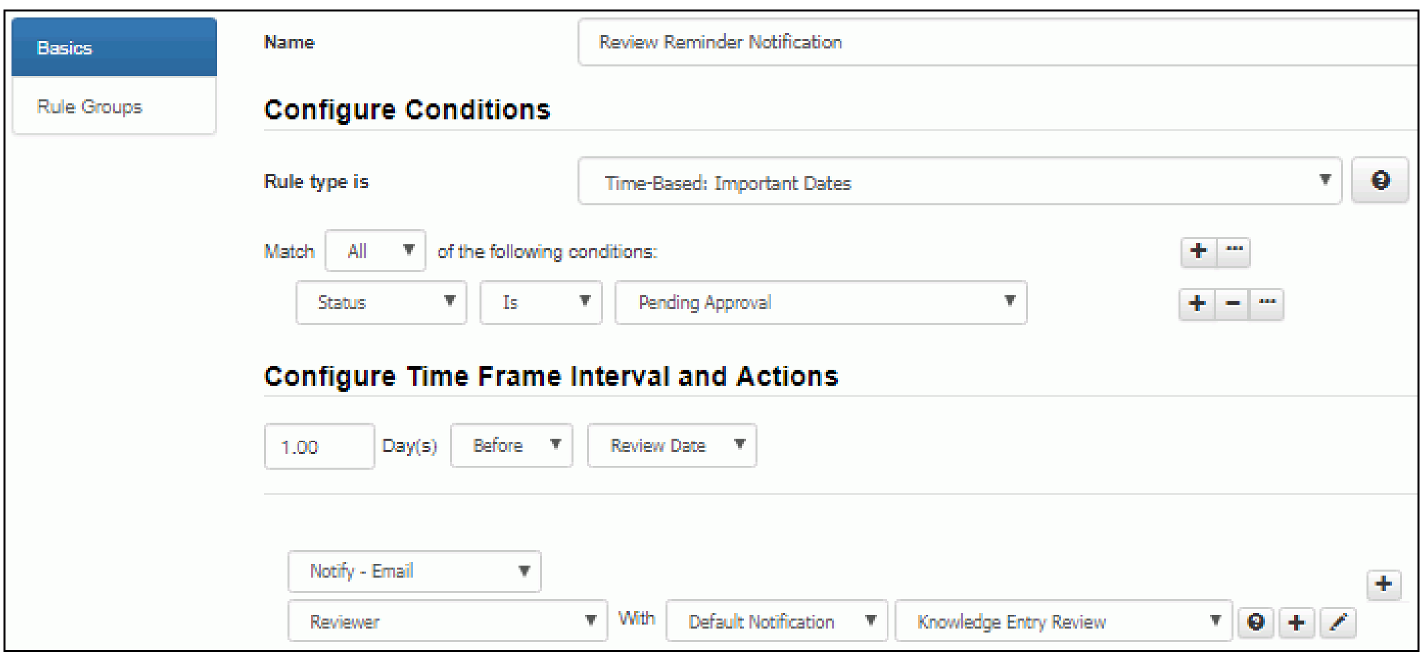


- **Time-Based** and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon save of a knowledge entry, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.

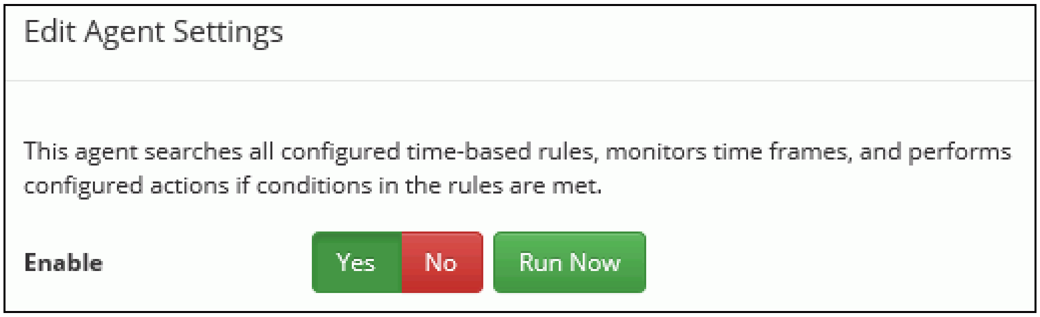


If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **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 will perform the specified action(s) before or after the value in a specified date field.



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



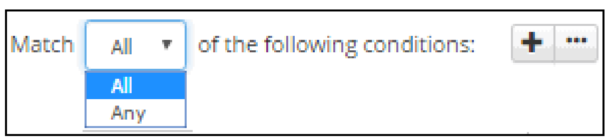
Note: If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

Creating Rules

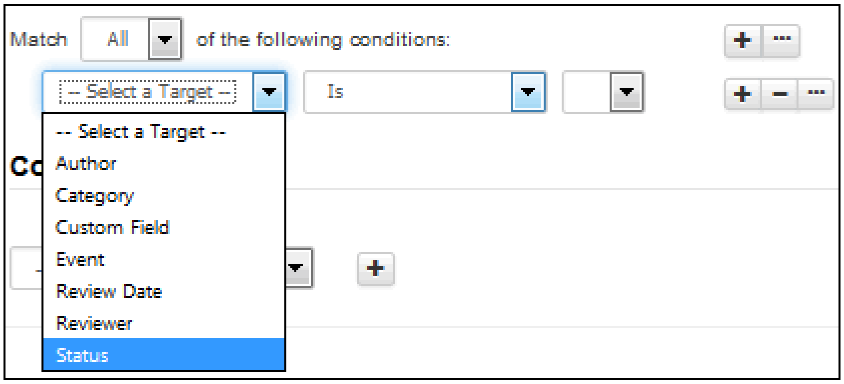
Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections “Configuring Conditions” on page 31 and “Configuring Actions” on page 33 for more information. See “Creating Time Frame Intervals for Time-Based Rules” on page 35 for information on configuring interval time frames and actions to perform with each set of intervals.

Configuring Conditions

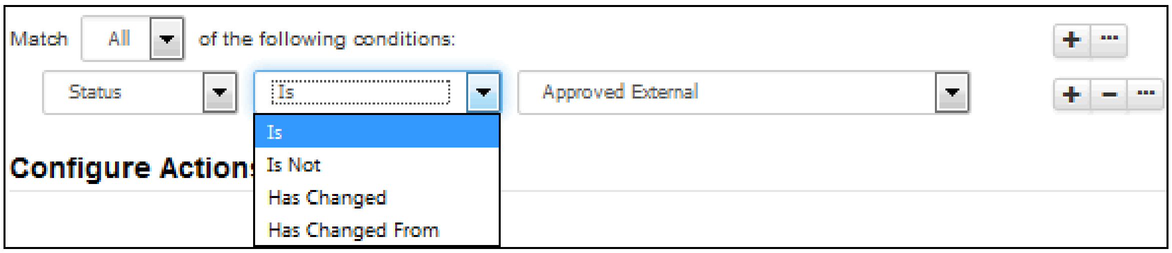
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



Select 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 knowledge entry save. In the Select a Target dropdown, select what to evaluate: an entry field or event.



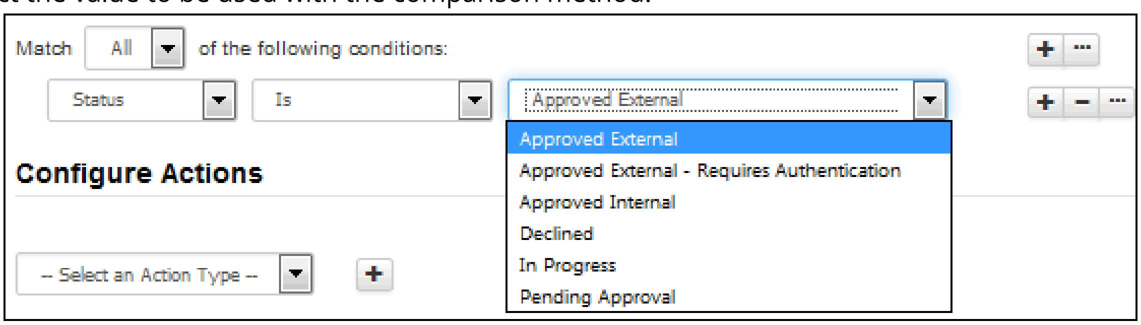
In the next dropdown, select the comparison method.



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.

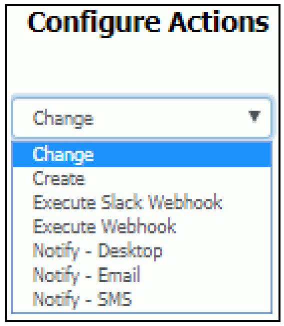
Finally, select the value to be used with the comparison method.



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.

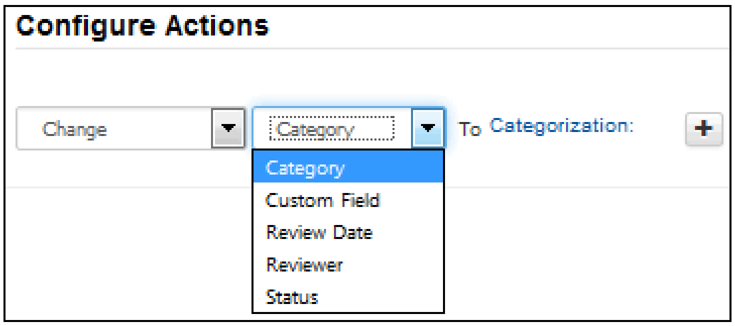
Configuring Actions

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

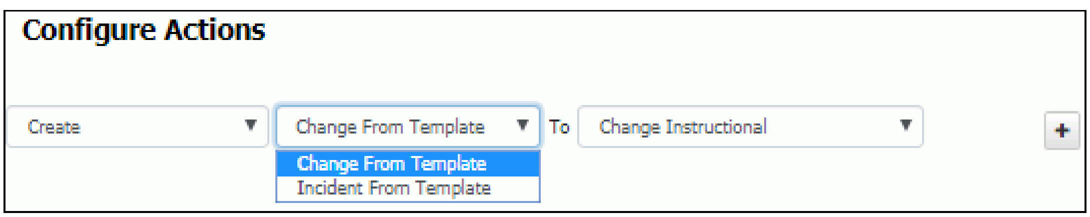


You can configure the following actions:

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



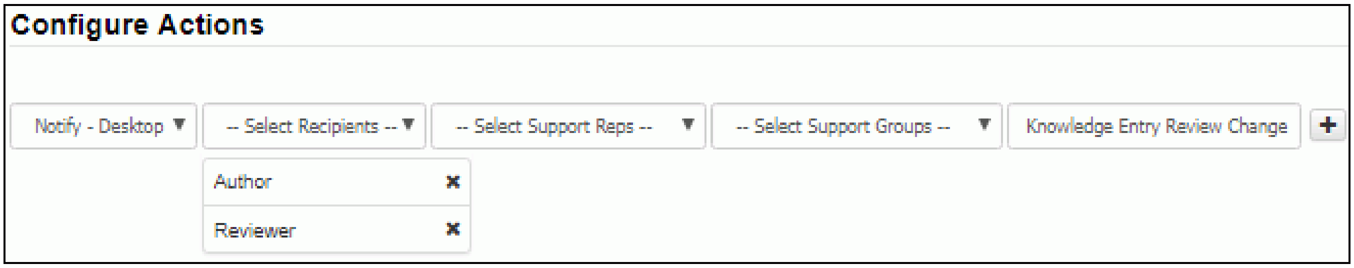
- **Create an incident or change** and apply a configured template by selecting Create and the template to apply. **Note that only incident templates configured with a default customer can be used**, and the resulting incident or change assignee will be the knowledge entry's reviewer, if one is set. If no reviewer has been set, the knowledge entry's author will be assigned.



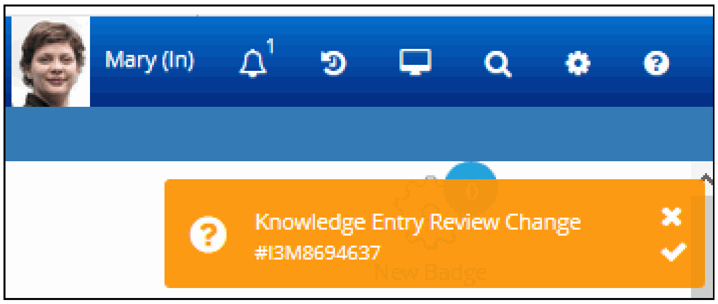
- **Execute a configured webhook** for posting Knowledge data to a web application. See “Configuring Webhooks” on page 47 for more information.

- **Send a notification** via desktop notification or email.

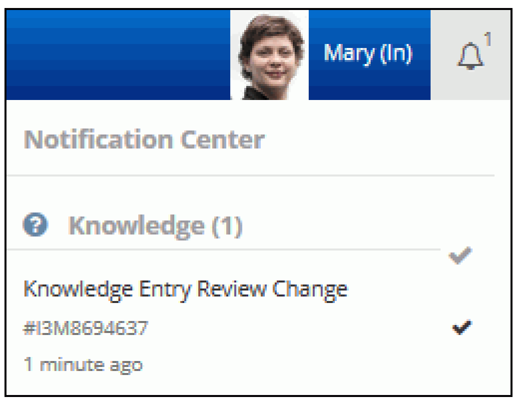
- **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



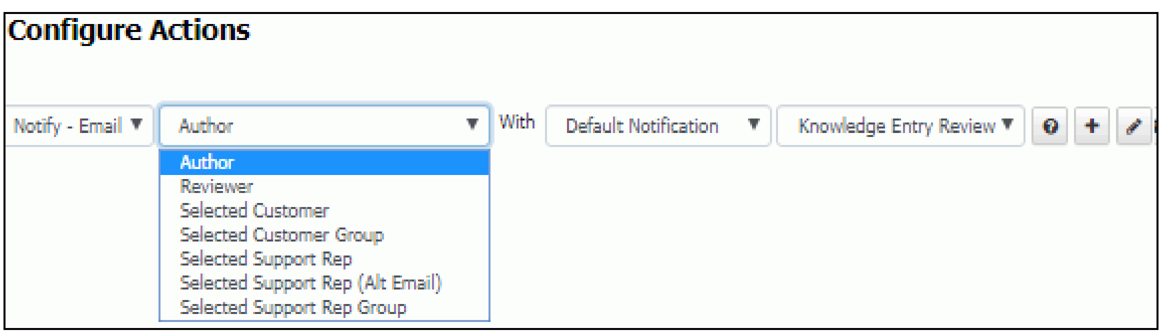
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.



- **Email:** Send a notification by selecting Notify, the recipient, and the notification to be sent.



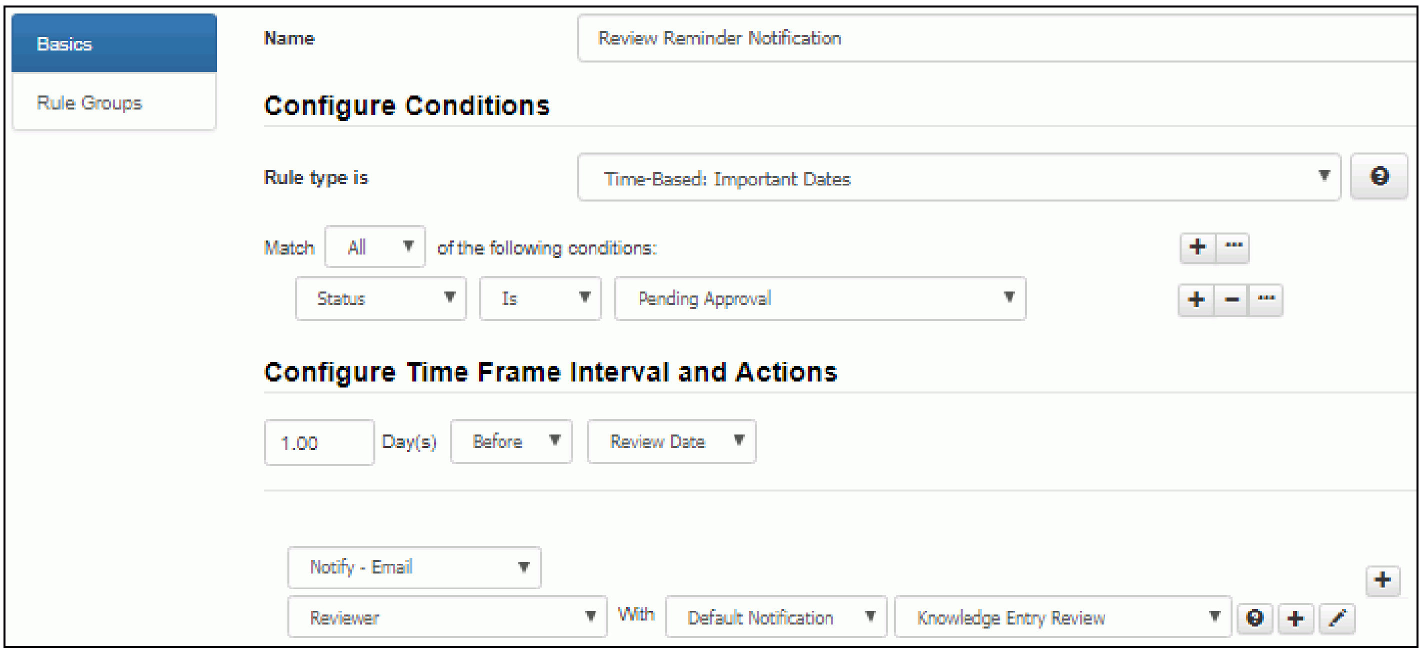
You can select the default or a custom notification; select Show Notification to display the contents of a selected notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient. Use the Create New and View/Edit options to access the Custom Notification screen; see "Customizing and Viewing Event Notification Content" on page 41 for more information.

- **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 44 for information on Twilio integration.

Creating Time Frame Intervals for Time-Based Rules

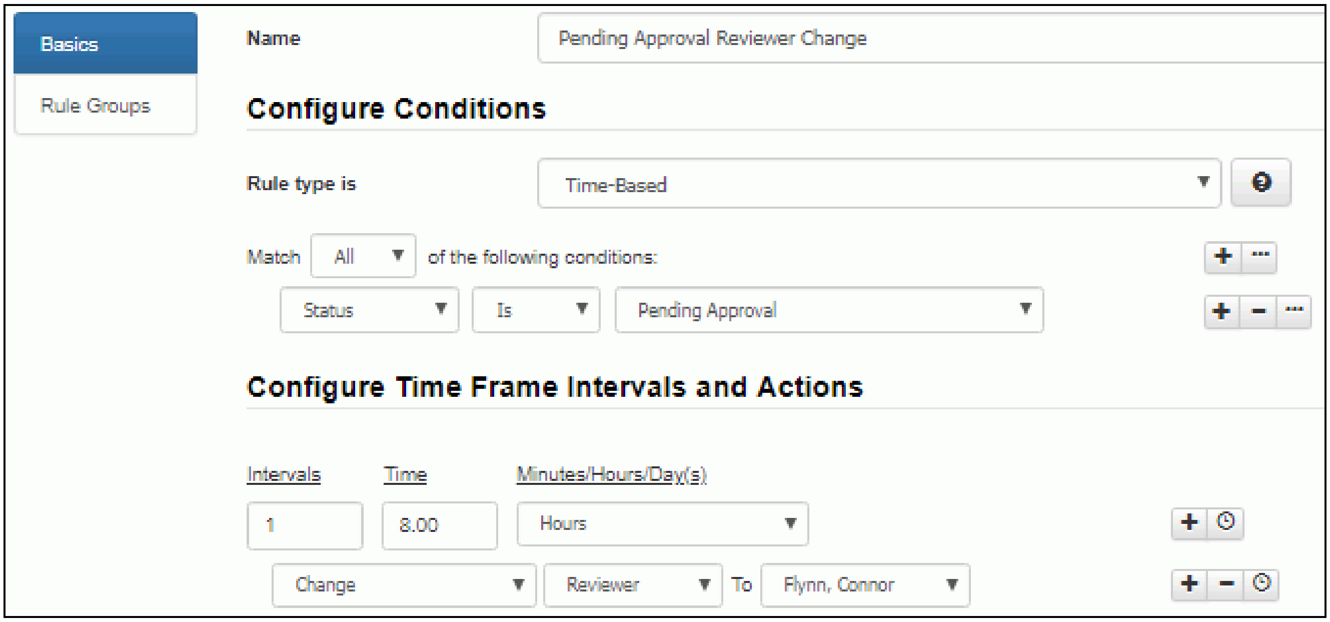
Time-Based: Review Date Rules

A Time-Based: Review Date rule will display a field for entering a number of days and a Before/After dropdown; the specified action(s) will be performed when the defined number of days before or after the knowledge entry’s review date occurs.



Time-Based and Time-Based: Cumulative Rules

With Time-Based and Time-Based: Cumulative rules, the Time Frame Intervals and Actions 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.



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 the time frame. 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 knowledge entry will be monitored for eight hours after initial save; if the status remains at Pending Approval for the entire eight hours, the reviewer will change to Connor Flynn.

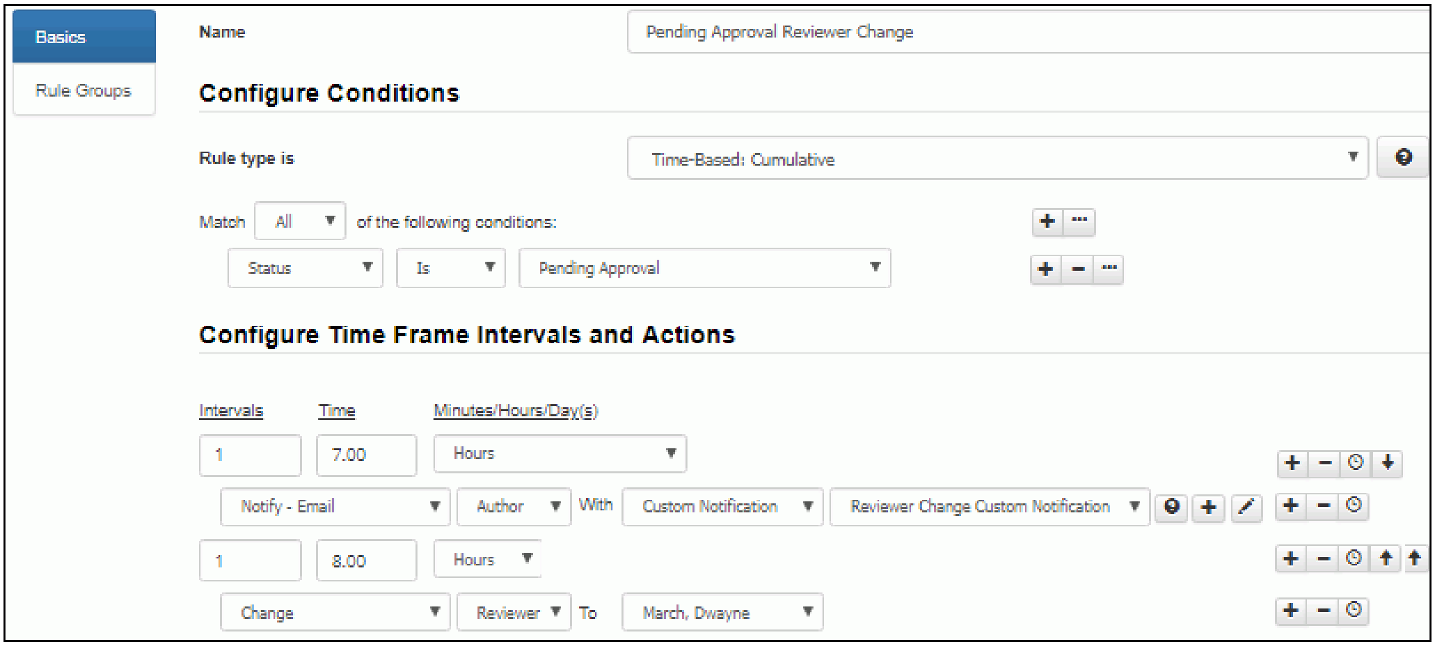
The difference between these types of rules is that, if conditions change prior to the configured interval settings, **Time-Based** rules will clear all pending actions and the time frame will restart if conditions are met again; **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

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

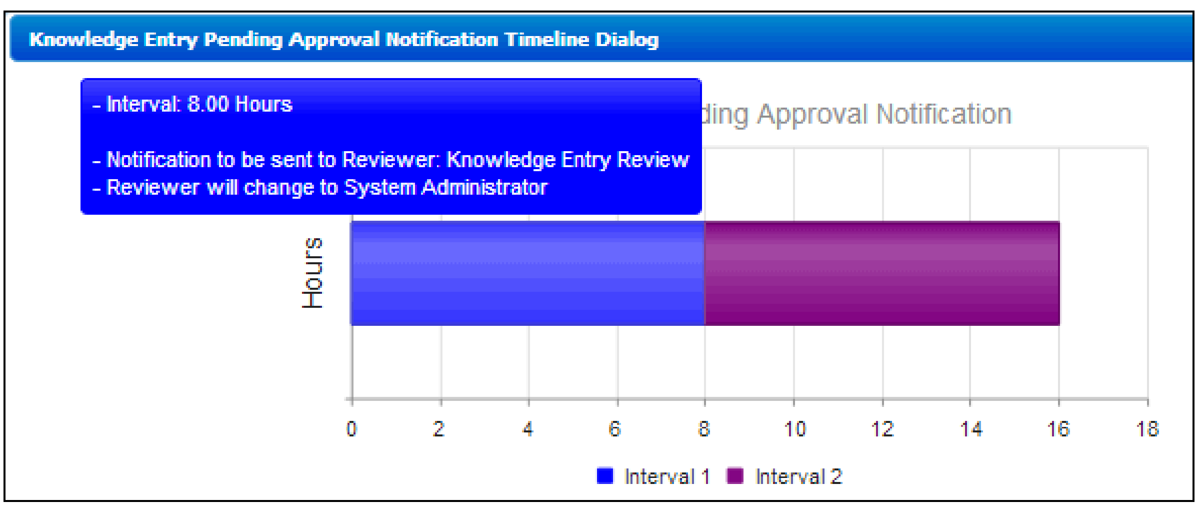
You can use the Add Interval option to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up options will appear for changing the order in which the interval time frames will be evaluated.

In the example below, the knowledge entry will be monitored for a seven hour time frame and if the status remains at Pending Approval for the entire seven hours, the Reviewer Change Notification will be sent to the knowledge entry author. The knowledge entry will then be monitored for an additional eight hour time frame and if the status remains at Pending Approval for the entire eight hours, the reviewer will change to Stuart Copeland.



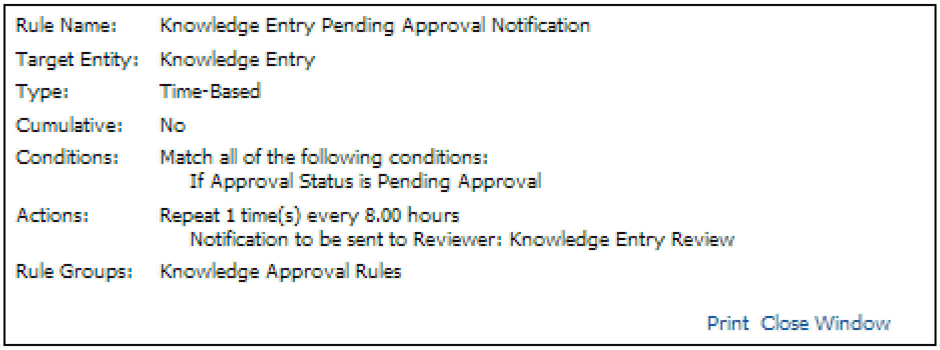
Displaying a Timeline for Configured Time Frame Intervals

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.



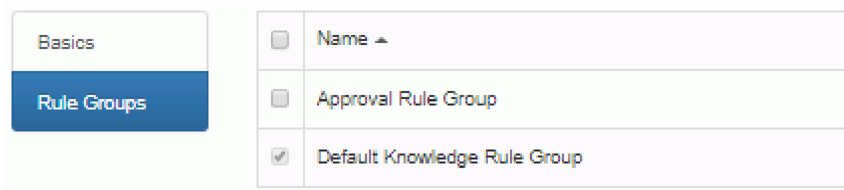
Printing a Rule

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.

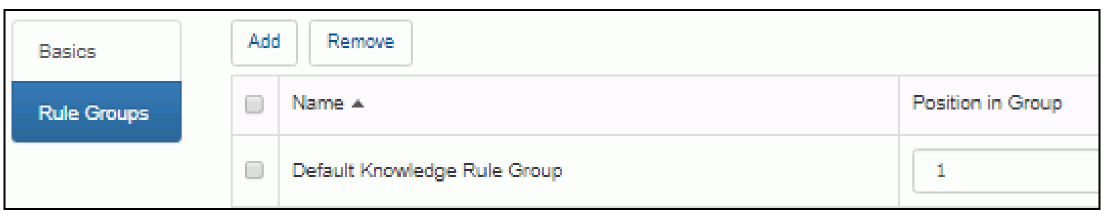


Associating Rules With Rule Groups

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.



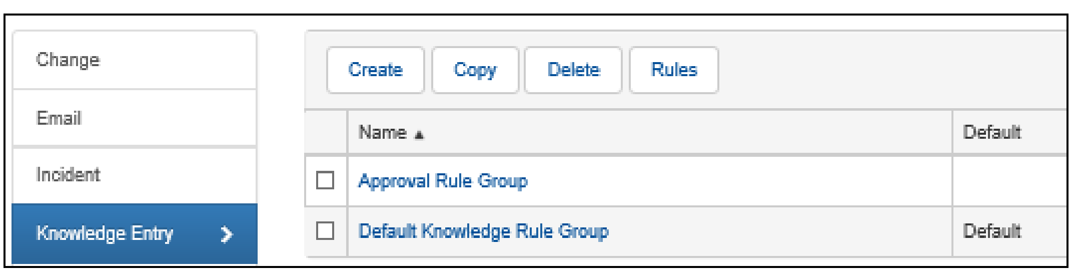
The rule group displays along with its position as shown below:



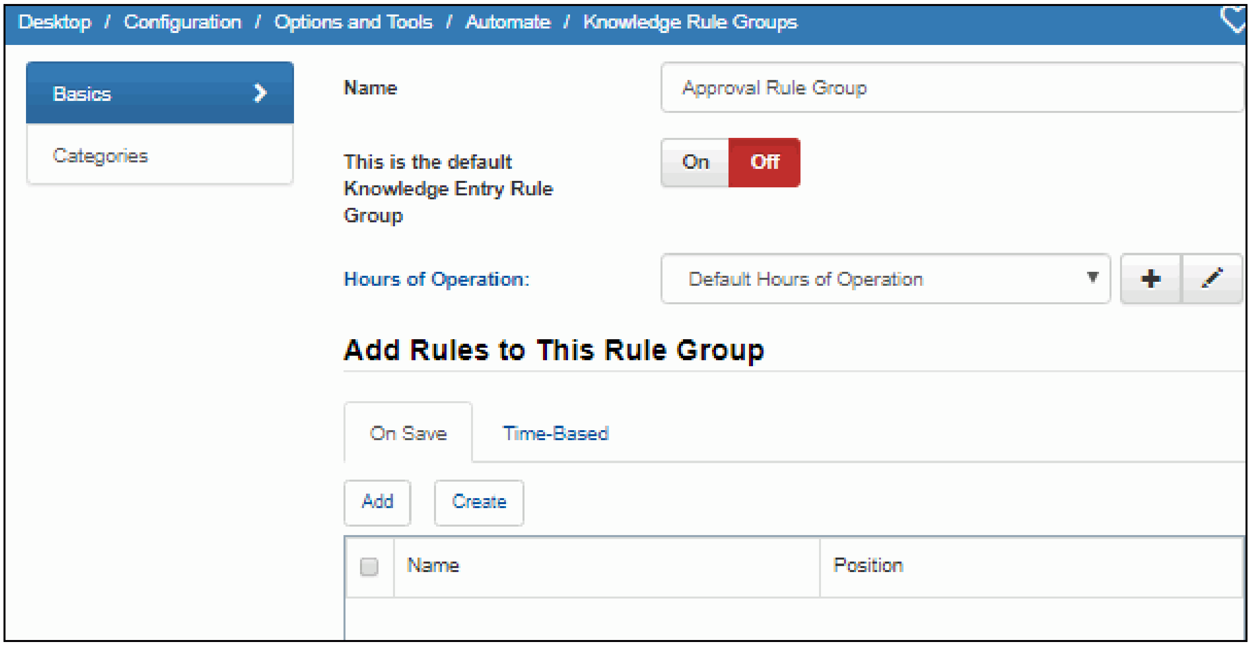
All rules in the rule group associated with a knowledge entry are evaluated when a knowledge entry is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

Click the Create link in the Knowledge Rule Groups screen to create a rule group that can be designated as the default Knowledge Entry rule group or associated with categories.



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



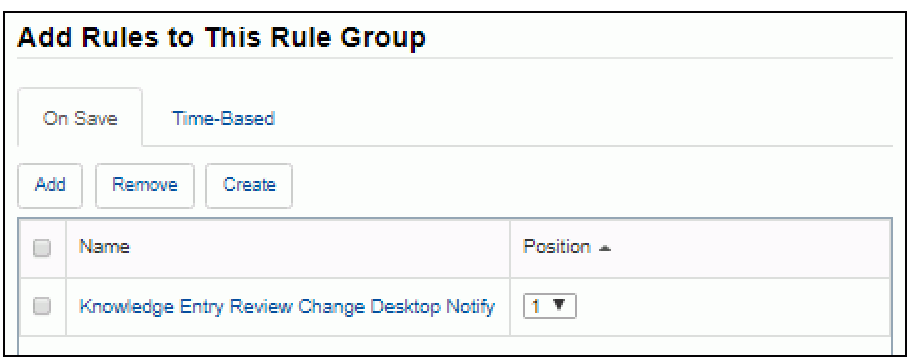
Name - Enter a name for the rule group; this name will appear in the Knowledge Entry screen when the rule group is in effect for a knowledge entry.

This is the Default Knowledge Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the category combination associated with a knowledge entry. One rule group must be designated as default for knowledge entries.

Hours of Operation - Select or create the Hours of Operation definition with the time frame to be used to determine the time intervals set in time-based rules. You can click the Hours of Operation link to display details on the selected definition. Note that an assigned Hours of Operation only applies to On Knowledge Entry Save rules if Within Business Hours is used in a condition.

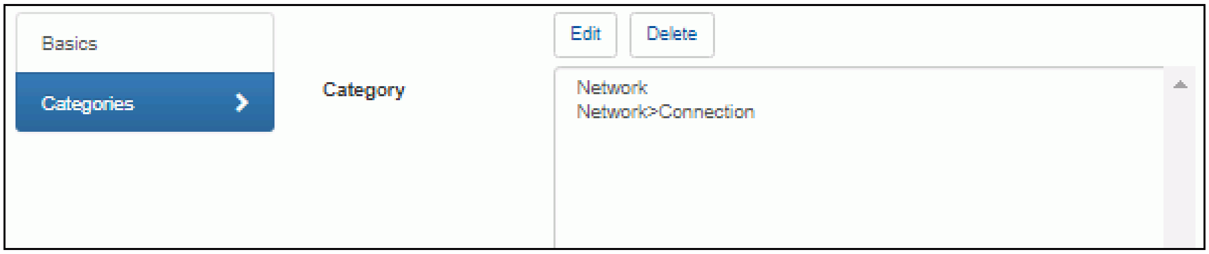
Adding Rules to a Rule Group

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 knowledge entry are evaluated when a knowledge entry is saved; the Position field determines the order in which actions are taken when conditions are met. You can use the Create button to create a rule and add it to the current rule group.



Assigning Categories to a Rule Group

Use the Add link on the Categories tab to associate the rule group with one or more categories. You can also do this via the Category screen.

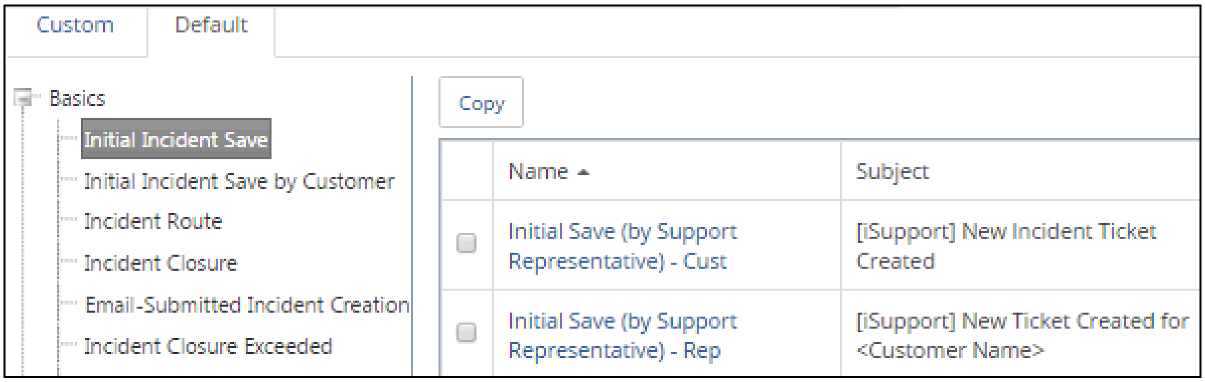


Customizing and Viewing Event Notification Content

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

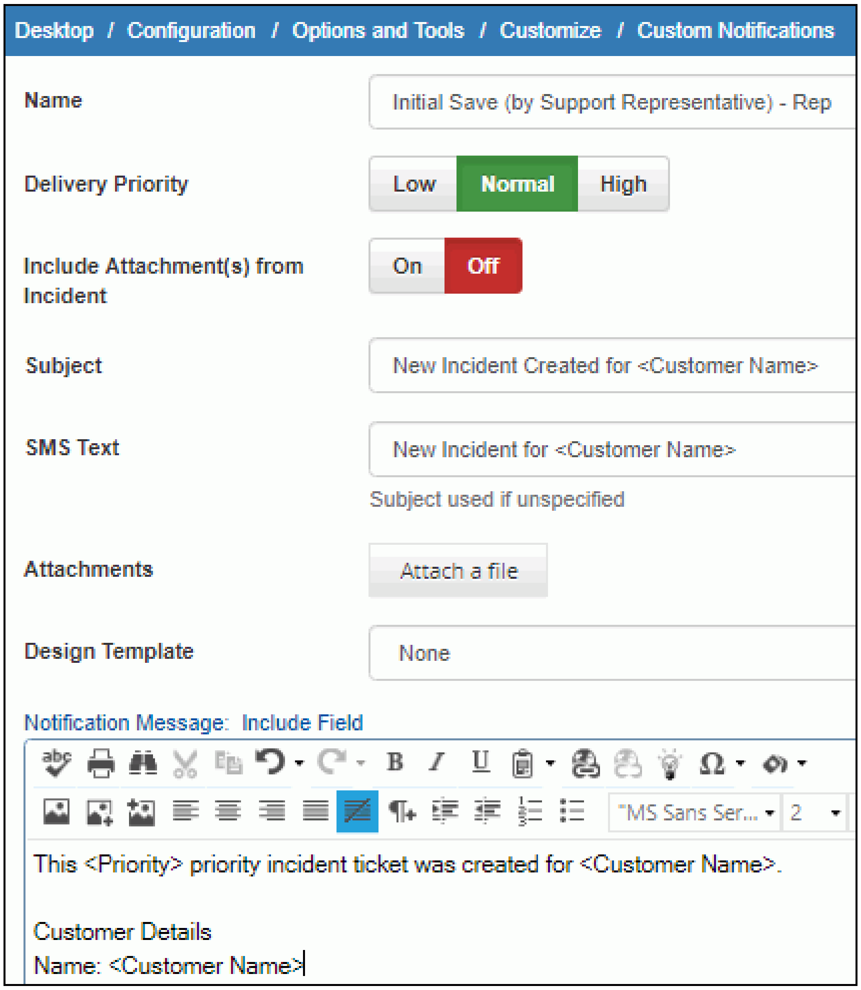
Recipients for default notifications can include both support representatives and customers, and the default notification text is different for each. Support representative notifications (designated as "Rep") typically contain customer details, the priority, the assignee, the URL to Desktop incident, 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 43 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.

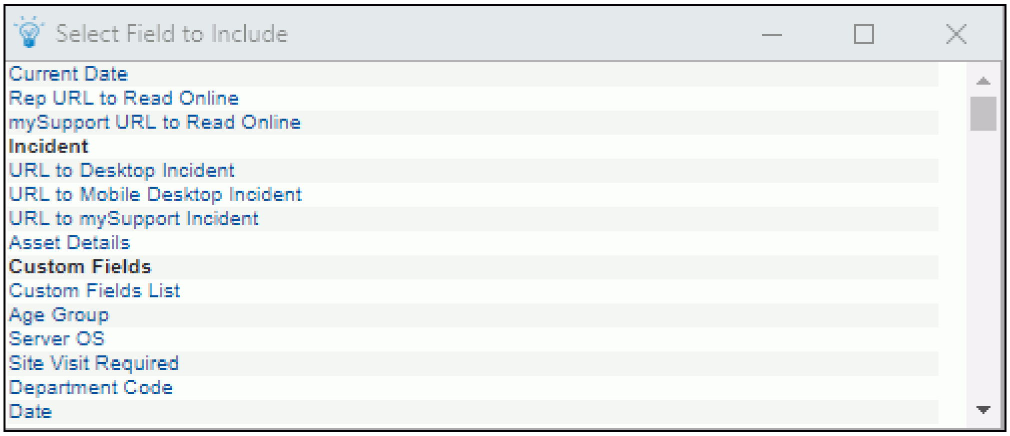
If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. See "Configuring Twilio Integrations" on page 44 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).



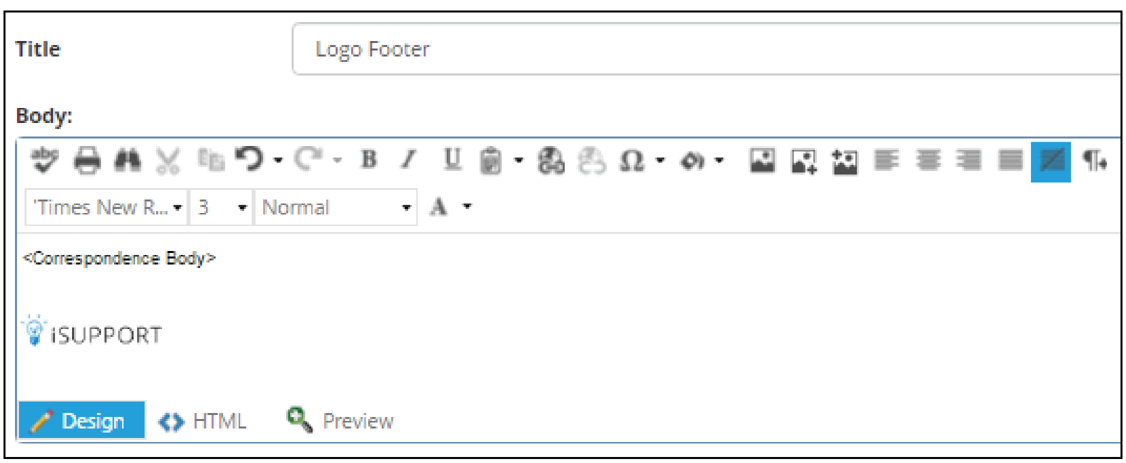
Include Attachment(s) from <record type> - For all modules except Asset, CMDB, Discussion Posts, Security, and Alerts, select this checkbox to associate any attachments from the referenced work item type to the notification when it is sent.

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

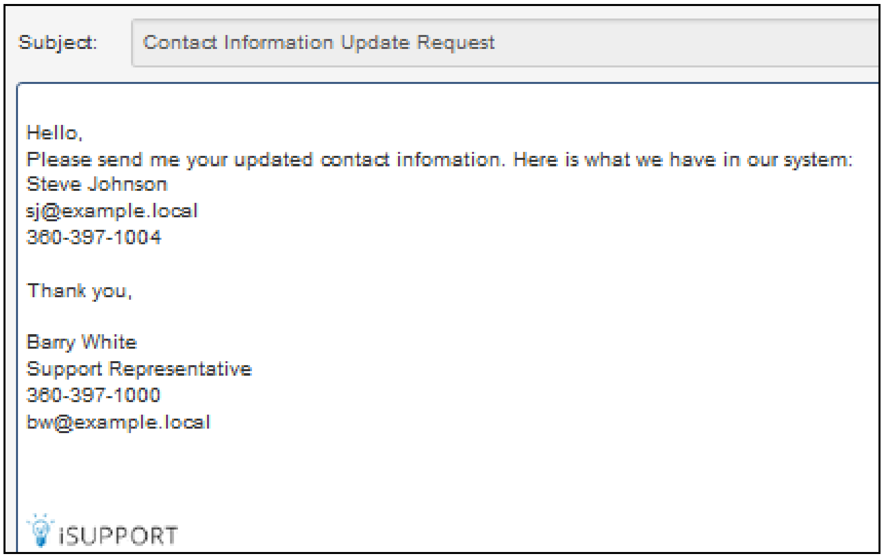
Note: If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

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.

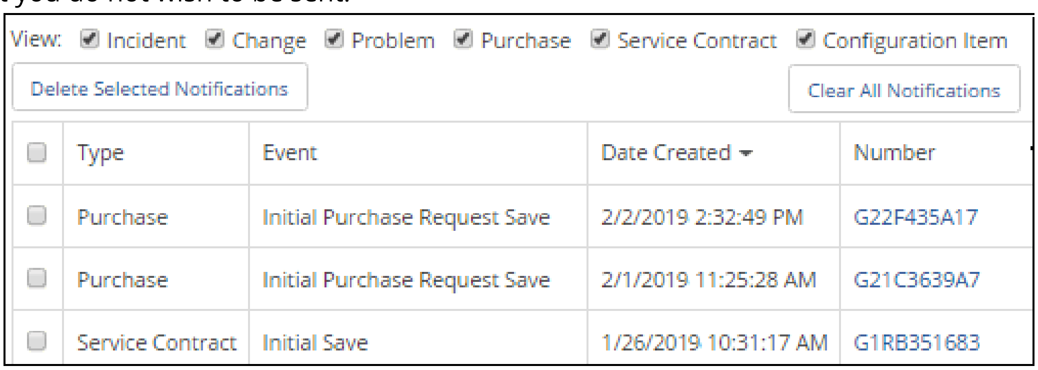


If a support representative sending a correspondence with the design template has a signature block, design elements that are after the <Correspondence Body> tag will appear after it.



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.



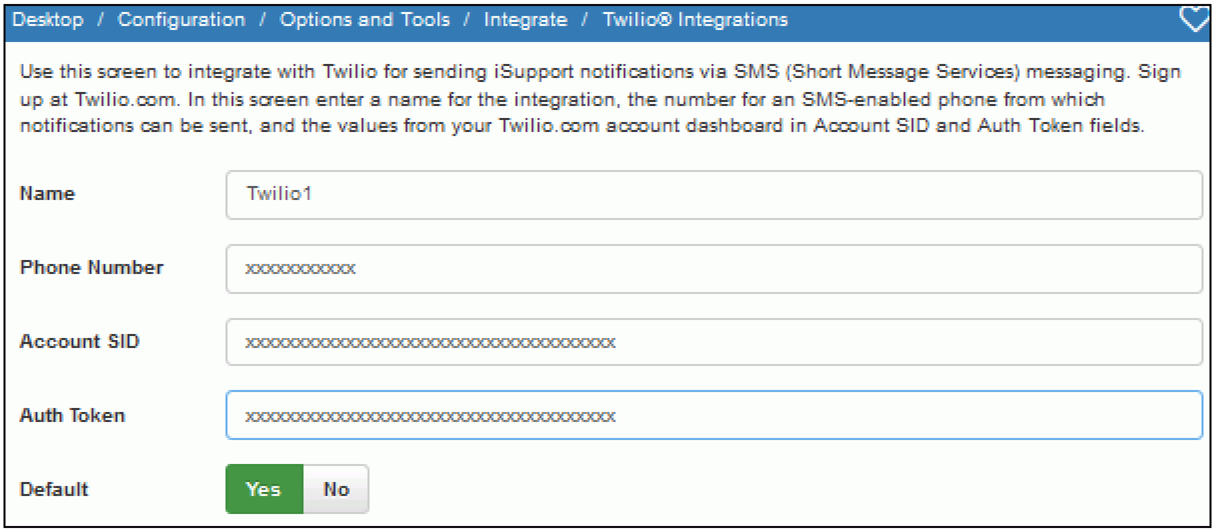
Configuring Twilio Integrations

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.

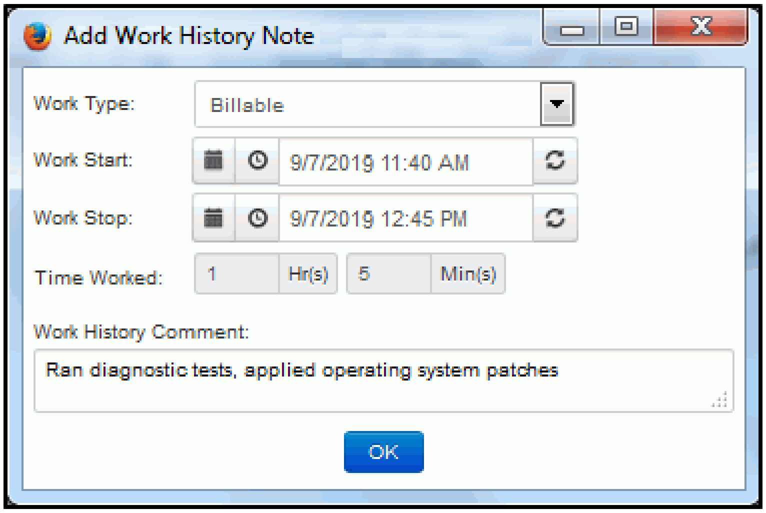
Account SID - Enter the value for the Account SID from your Twilio.com account dashboard.

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

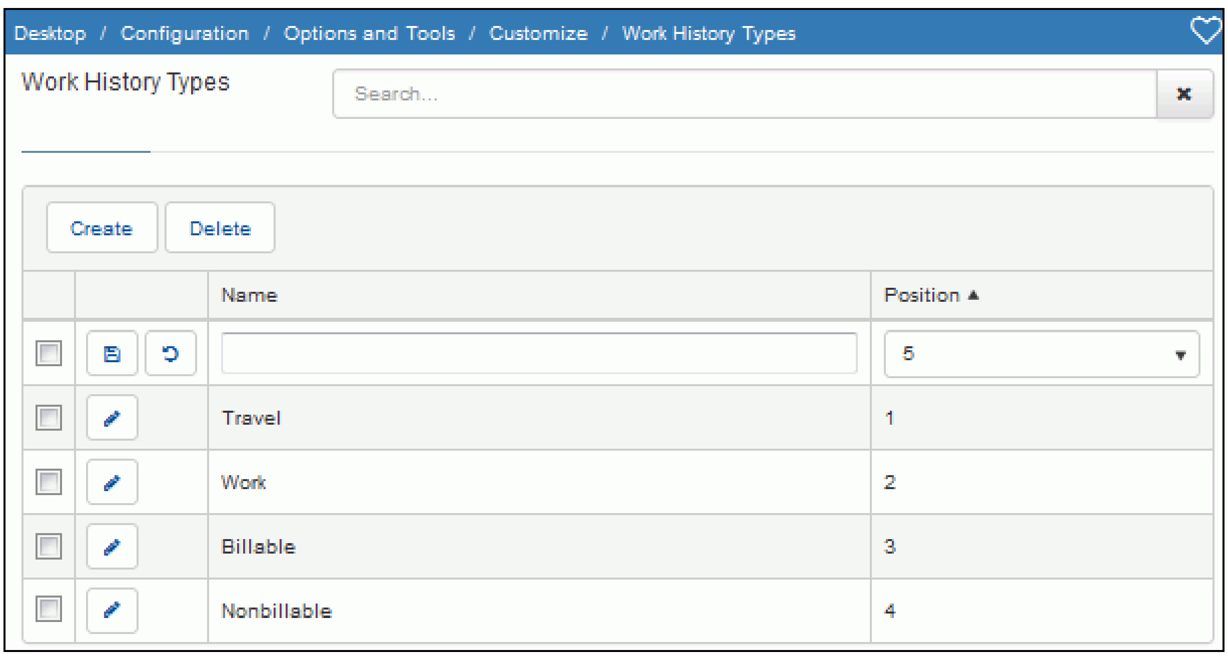
Default - Select Yes to use this Twilio integration phone number for all work items that have not been assigned a Twilio integration phone number via a rule.

Configuring 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.



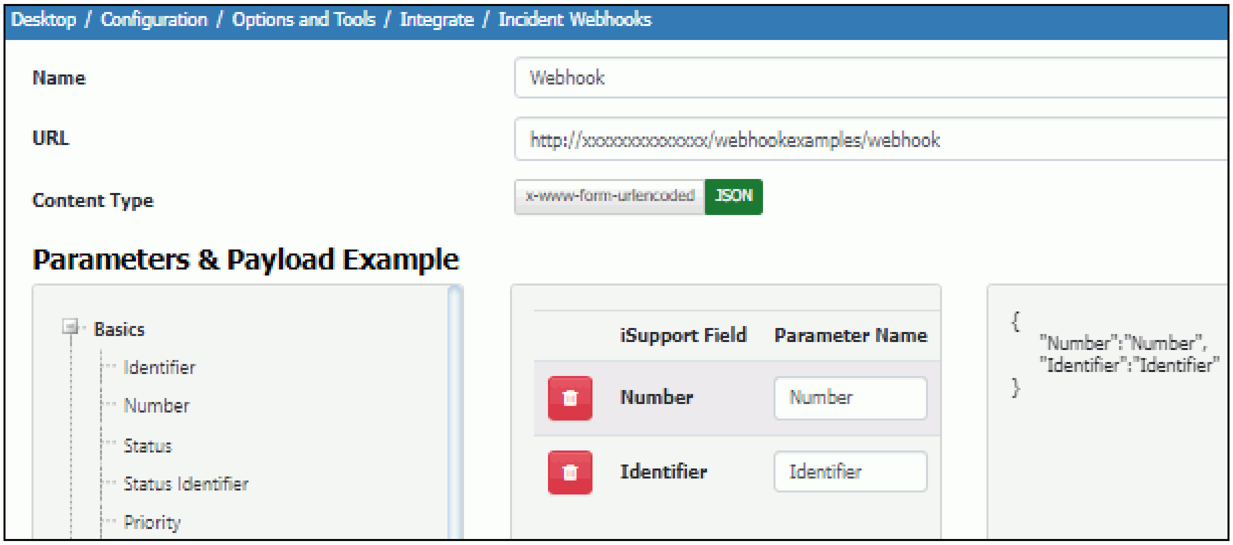
Use the Name field to enter work history types. In the Position field, select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)



Configuring 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.