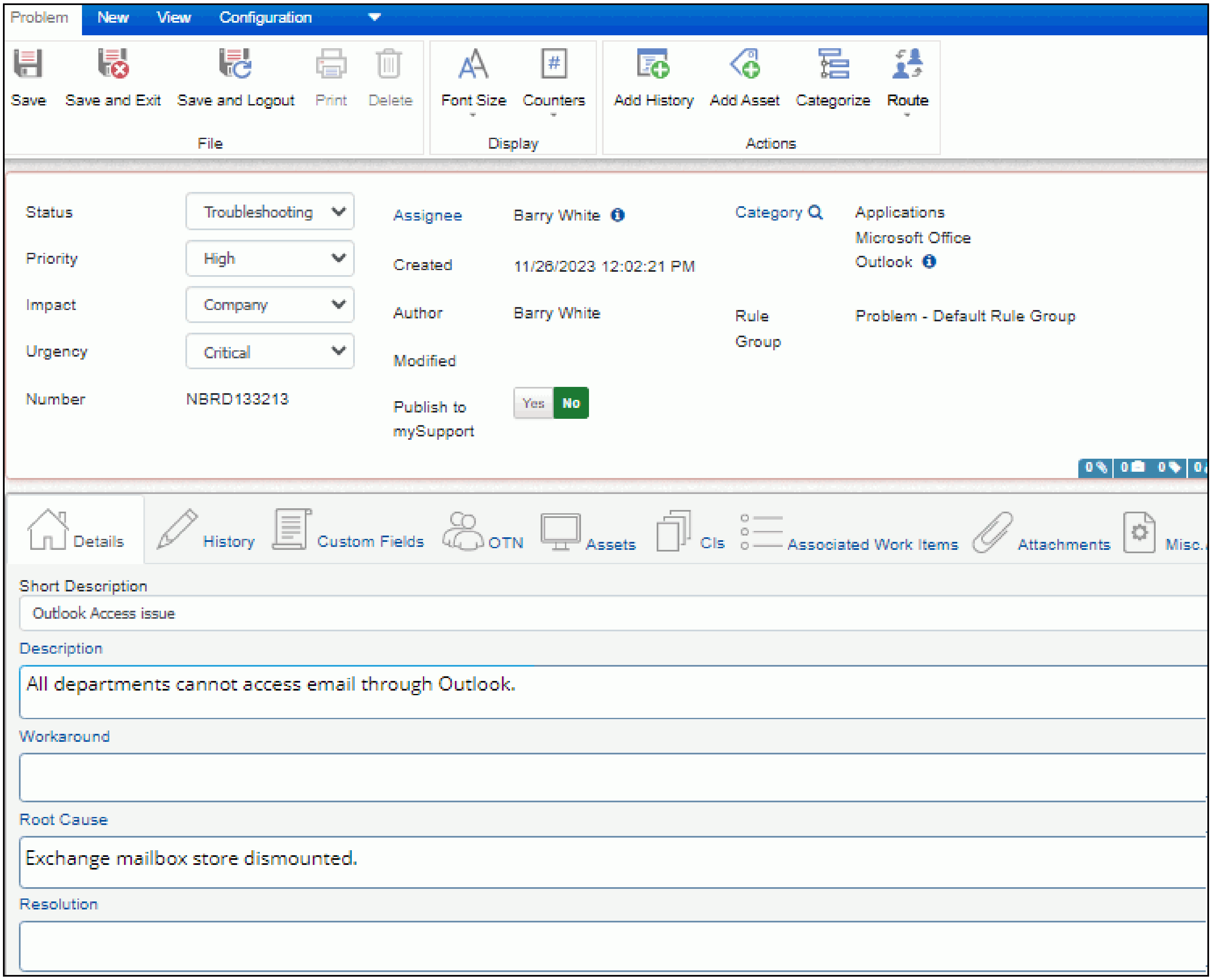
Configuring iSupport® Problem Functionality

Problem Management functionality is included if you have the Service Desk edition. Use it to document and track the root cause of incidents; you can configure associated incidents to be closed when a Problem record is closed.



Basic Configuration

- Enable and set basic Problem options in Feature Basics. See “Setting Problem Basics Configuration Options” on page 4.
- Set up categories, which are custom values that you create for describing an incident, problem, or change. (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.
- If applicable, configure roles/permissions for support reps and rep groups using Problem functionality via the Support Representatives screen. See the online help for more information.

Creating Problem Records

You can manually create Problem records via the Problem screen as well as the Incident and Change screens. See the online help for more information.

Customizing iSupport Defaults

- iSupport includes a default Problem screen layout with a comprehensive set of fields for tracking Problem 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 and categories. See "Configuring Screen Layouts" on page 44.
- You can create custom status labels for the Problem status levels of Open and Closed. See "Defining Custom Status Labels" on page 29.
- If there are fields you need for the Problem screen that are not included in iSupport by default, you can create custom fields. See "Configuring Custom Fields" on page 31.
- You can include a field for entering or automatically generating a custom number. See "Defining Custom Numbers" on page 38.
- You can define custom impact and urgency values that map to priority levels. Enable impact/urgency mapping via the Feature Basics screen. See "Setting Problem Basics Configuration Options" on page 4.
- You can enable your customers to view Problem records on mySupport portals, and you can customize the display screen layouts. See the online help for more information.

Sending Notifications

- You can use Problem rules to send Desktop and email notifications when specified conditions based on Problem record fields or events are met; for example, you can configure a rule to send a notification when the priority of a Problem record is modified. See "Configuring Rules and Rule Groups for Problem Records" on page 11.
- 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 24.
- You can send correspondence email from the Problem screen. Correspondence can include data from Problem 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.

Using Workflow Features

- You can route via name, skill, group, and location, all with or without load balancing, in the Problem screen. Enable routing methods via Feature Basics. See "Setting Problem Basics Configuration Options" on page 4.
- You can use Problem rules to automatically route Problem records via round robin or load balancing. See "Configuring Rules and Rule Groups for Problem Records" on page 11.
- You can automatically change field values on Problem records via Problem rules. See "Configuring Rules and Rule Groups for Problem Records" on page 11.
- You can associate new and existing Asset records. See the online help for more information.
- You can also associate new and existing Incident, Change, and Purchase records, and enable associated incidents to be closed when a Problem record is closed. See the online help for more information.
- You can perform ad hoc scans on non-Windows SNMP-enabled devices in the Problem screen, and associate scans with a Problem record. See the online help for more information.
- Configure webhooks for posting Problem data to a web application via Problem rules. See "Configuring Rules and Rule Groups for Problem Records" on page 11.
- You can enable Twitter integration for publishing Problem descriptions to a Twitter account. See "Configuring a Twitter Application" on page 59.

- You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Zoom, and Microsoft 365 Teams to display an option in the Problem screen for initiating a meeting. See "Configuring Calendar and Meeting Integrations" on page 66 for more information.
- If Purchasing functionality is enabled, when entering time worked in the Problem screen, you can add a charge (an amount of time worked multiplied by a rate) as a separate line item or use a charge to decrement an existing line item on an associated purchase order. See the online help for more information.

Managing Problem Records

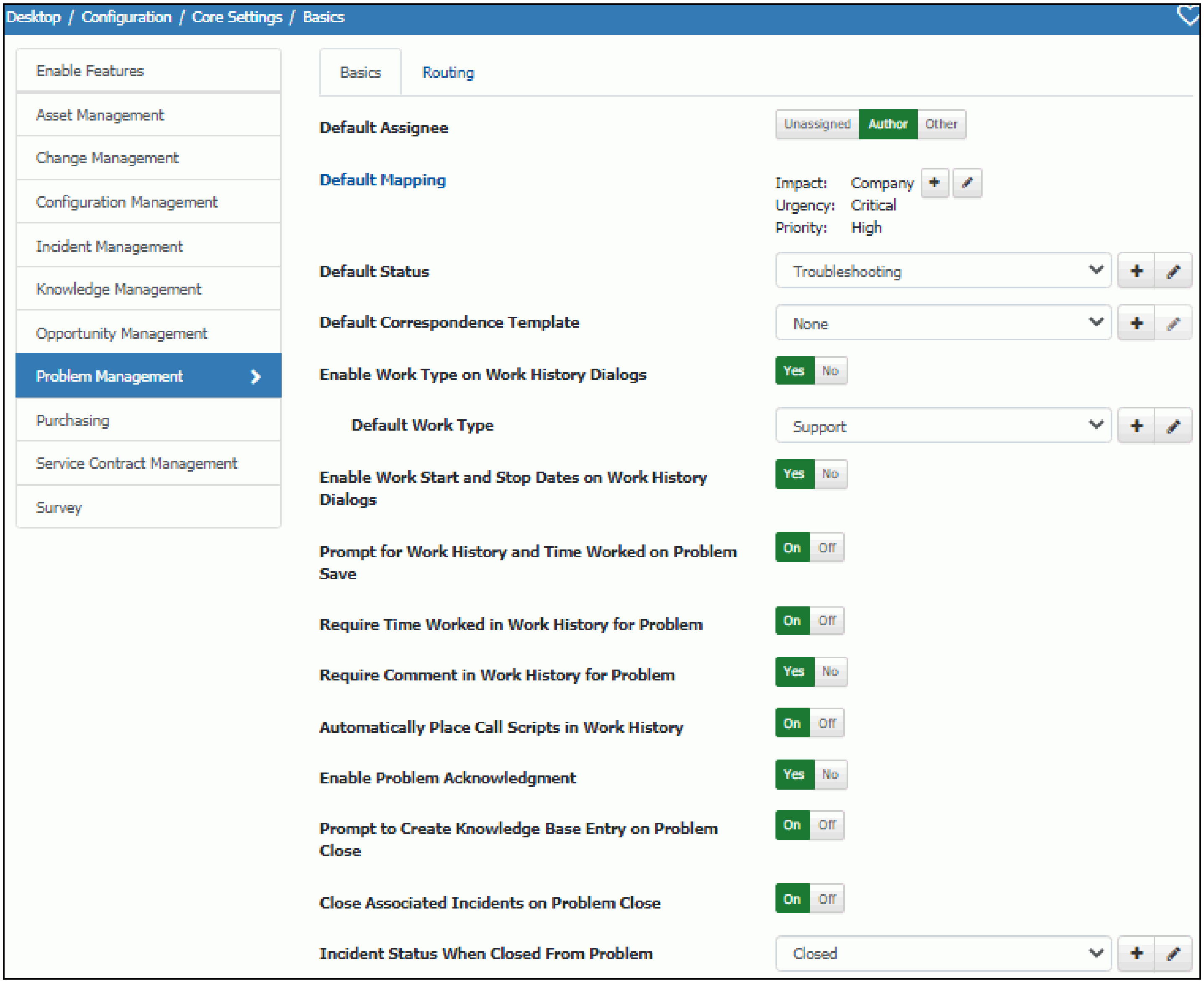
- You can use the Action menu in the View component on the Desktop to perform actions such as opening and routing multiple items. See the online help for more information.
- You can archive problems. See "Archiving and Database Maintenance" on page 63.
- You can define Work History types to create custom entries for support representatives to select to describe the work performed on a work item. See "Configuring Work History Types" on page 43.
- If you need to overwrite fields on a saved incident, see "Using the Data Override Feature for Incidents, Problems, and Changes" on page 62.

Setting Problem Basics Configuration Options

The Problem Basics screen enables you to configure defaults and other Problem options. For information on configuring routing, see "Enabling Routing Methods" on page 6.

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 in newly-created Problem records.
- Author to assign newly-created Problem records to the person who created the problem.
- Other to designate a support representative to populate the Assignee field by default in newly-created Problem records.

Default Mapping - Click the Default Mapping link to select the associated predefined values to appear as default in the Impact, Urgency, and Priority fields in the Problem screen. Use the Create New and View/Edit options to access the Impact and Urgency Mapping screen.

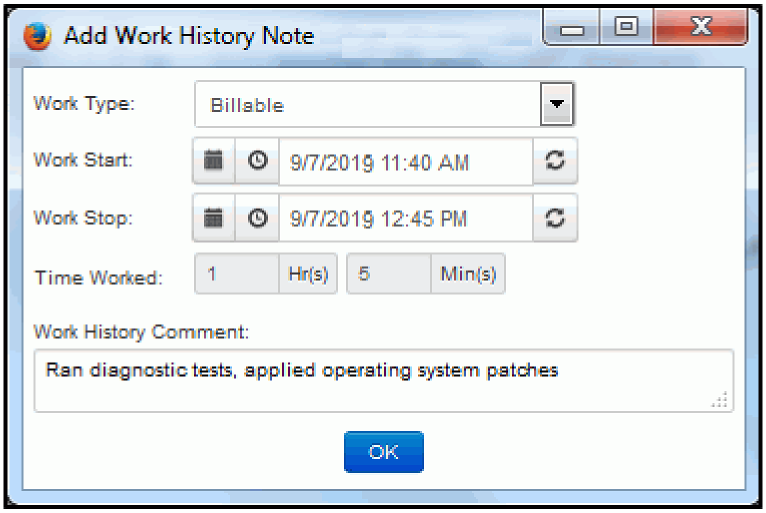
Default Status - Select the Open status to assign to newly-created problems. You set up custom status labels for the Open status on the Custom Status tab. Use the + Create New and View/Edit options to access the Custom Status Labels screen.

Default Correspondence Template - Select the correspondence template that will apply by default when a support representative initiates a correspondence via the Problem entry screen. Correspondence templates that are active and enabled for the Problem 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 Problem 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 43.

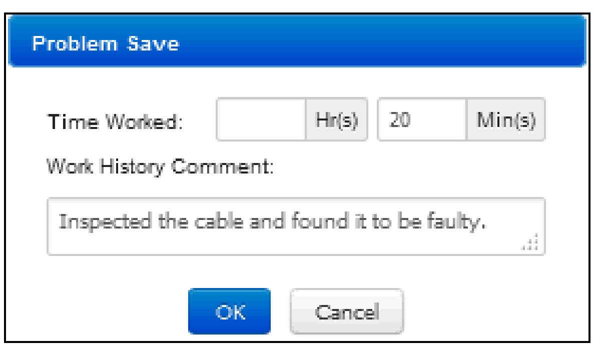
Enable Work Start and Stop Dates on Work History Dialogs - Select Yes to include Work Start and Work Stop fields in the Work History and Problem Save dialogs in the Problem screen.



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 Problem 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 Problem Save - Select Yes to display the Save dialog every time a support representative saves a problem.



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

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

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

Prompt to Create Knowledge Base Entry On Problem Close - Select Yes to enable a prompt for creating a knowledge entry to display every time a problem is closed.

Close Associated Incidents on Problem Close - Incidents can be associated with Problem records in both the Incident and Problem screens. Select Yes to automatically close any associated incidents when a Closed status is selected for a Problem record. The text in the Resolution field will be used as default for the incident resolution, but a dialog will appear when the Problem record is closed for editing it.

Incident Status when Closed from Problem - If Yes is selected in the Close Associated Incidents on Problem Close field, select the Closed status to assign to the incident. Use the + Create New and View/Edit options to access the Custom Status Labels screen.

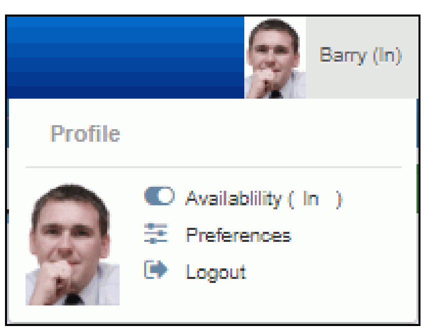
Enabling Routing Methods

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.

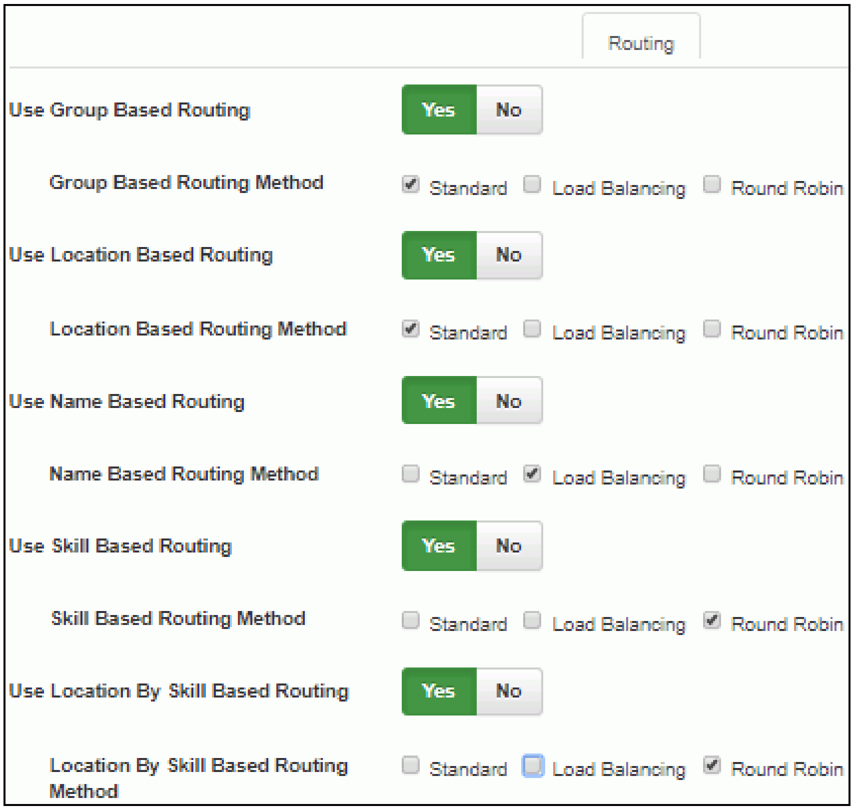
Note that routing availability can be controlled via:

- 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 problem route is initiated.



All routing methods can also include load balancing, which involves weights based on problem 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 problem and the problem is reassigned, he/she will be bypassed until all available support representatives with the skill or in the group or location (depending on the method selected) have worked with the problem. If all support representatives have the same weight for their problems, a random choice is selected for the assignee.

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

Use Group Based Routing - Select Yes to enable problems to be routed to available support representatives that are set up in groups. In the Problem 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 problem statistics, including weights based on problem 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 an problem 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.

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 problems based on current open problem statistics, including weights based on problem 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 problem 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 problem list of all available support representatives.
- Load Balancing - routes problems based on current open problem statistics, including weights based on problem priority. The available support representative with the lightest overall workload will be selected.
- Round Robin - the support representative who was assigned a problem 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 problem categorization to select qualified support representatives. After a support representative classifies the problem and selects skill-based routing, the category levels selected for the problem 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 problem categorization and current open problem statistics, which include weights based on problem 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 problem 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. 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:

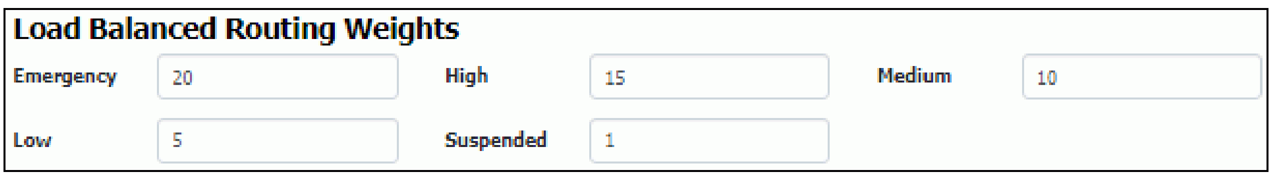
- Standard - allows the support representative to select a location and the level of categorization that exactly matches the categorization for which support representative skills should be searched.
- Load Balancing - routes problems based on current open problem statistics, including weights based on problem 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 problem using the round robin method on the oldest date and time is selected.

Skill-Based Routing Levels

Enter the labels (for example, Novice) to display for skill levels one through four.

Load Balanced Routing Weights

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



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

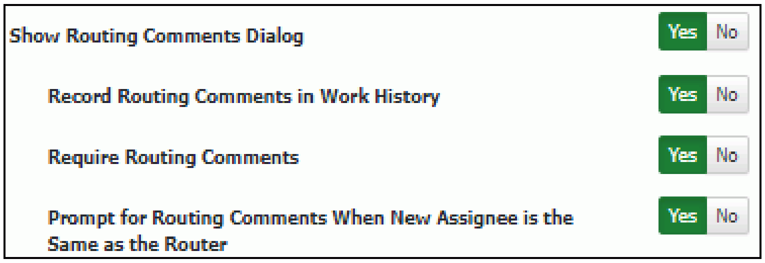
- First support representative = Two problems at emergency priority (2 X 20 = 40).
- Second support representative = One problem at medium priority and two at low priority (1 X 10) + (2 X 5) = 20.

Even though the second support representative has three problems 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 problems with a suspended status. To weight all problems the same regardless of their priority, enter a value of 1 for all five problem weight fields.

Routing Comment Options

The Routing Comment dialog can be configured to appear in the Problem 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 problem 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 problem.

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.

Configuring Rules and Rule Groups for Problem Records

Use the Problem 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 automatically:

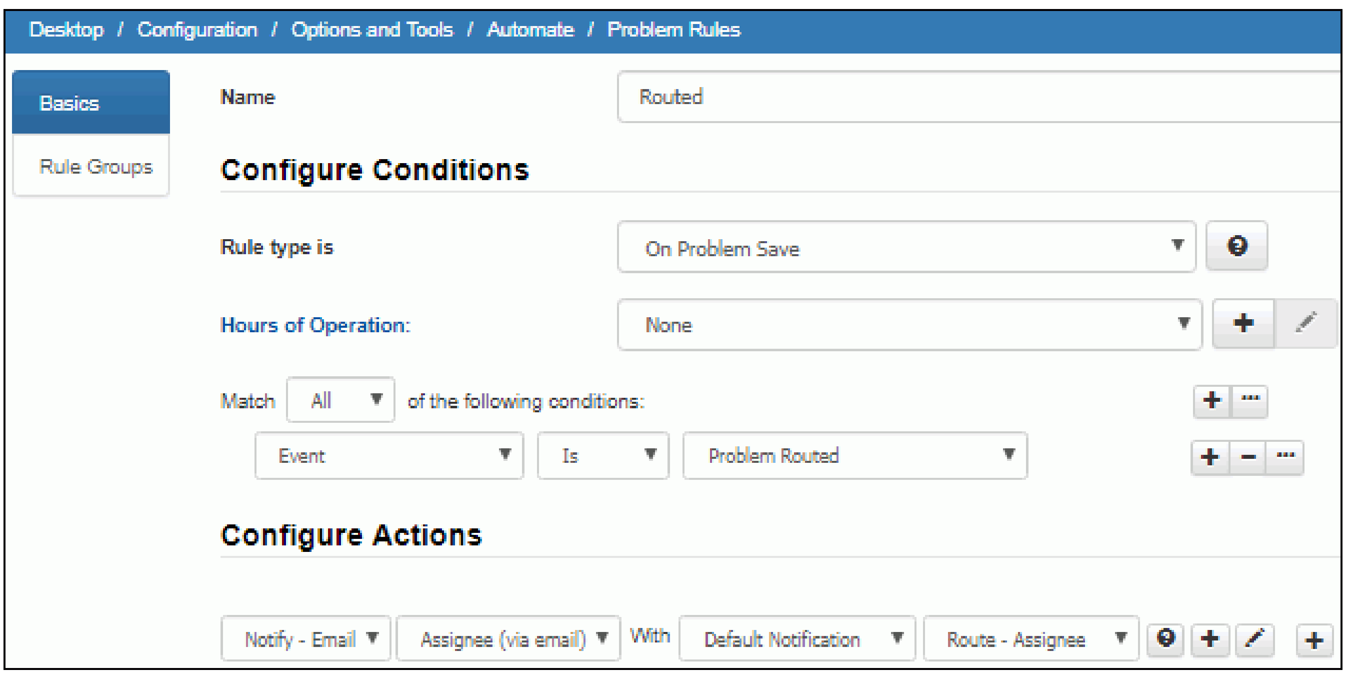
- Change values in the Assignee, Category, Impact, Urgency, Status, Publish to mySupport, and Priority fields, as well as in any custom fields
- Send notification via email, Desktop, and SMS
- Route via load balancing or the round robin method
- Execute a webhook for posting Problem data to a web application

In order for a rule to be utilized, it must be included in a **rule group**. When a problem 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. Rule groups are applied to problems through category combinations. The rule group designated as default will be used if none are applicable.

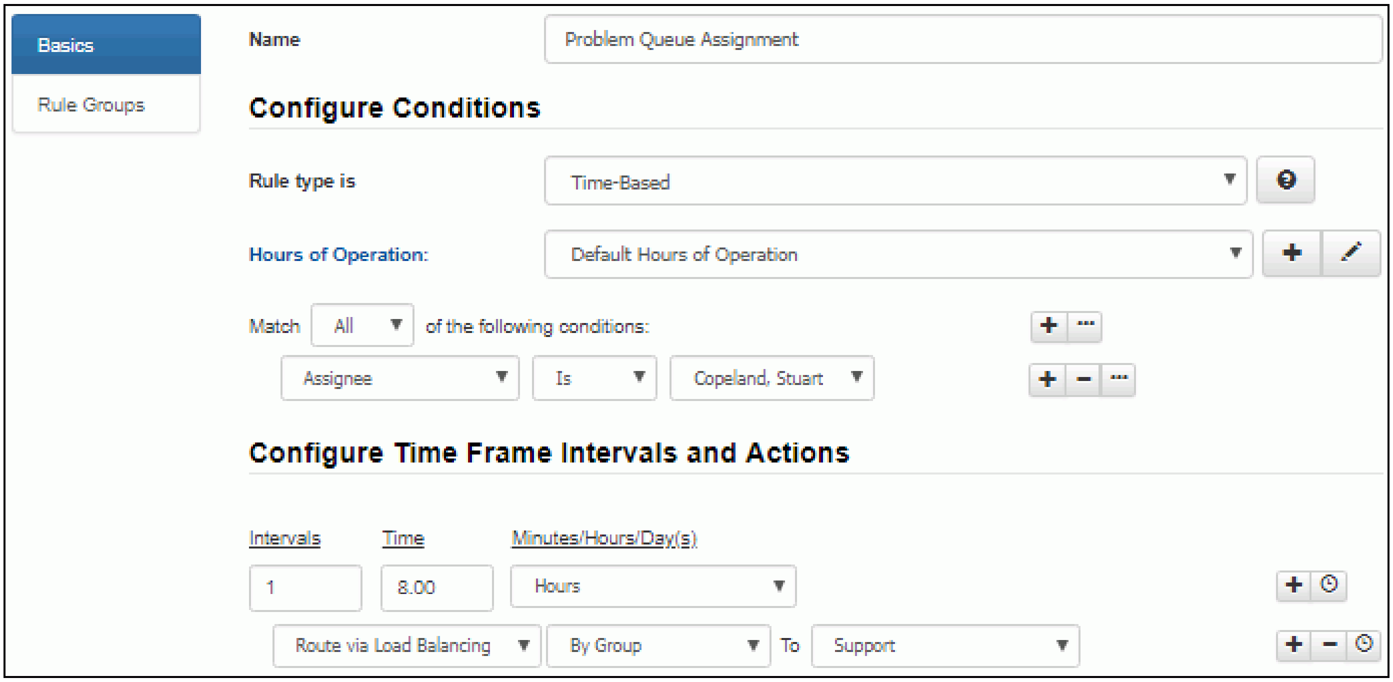
You can use the Problem Rule Groups screen to create new rule groups and assign them to category combinations. (You can also assign rule groups via the Category entry screen.) See "Creating Rule Groups" on page 21 for more information. A default problem rule group will be included in iSupport on installation or upgrade, and upgrades will convert previously configured Problem notifications into rules in the default rule group.

Rule Types

- **On Problem Save** rules do not incorporate time frames; when a problem 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 problem save, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.



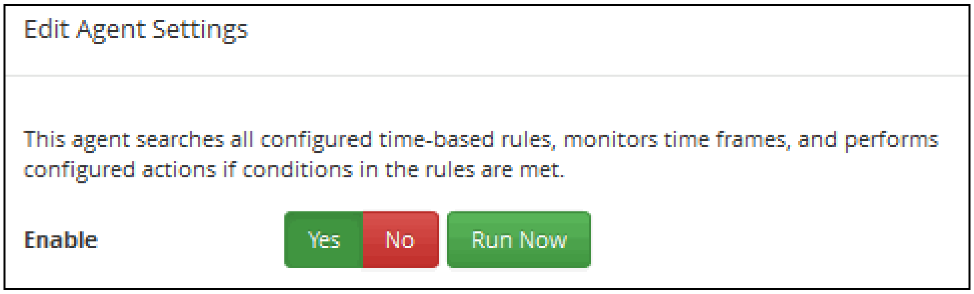
If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **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.

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.

- If a date or date/time custom field is created for problems, **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.

Ensure that the Time-Based Rules agent is enabled via the button in the Rules list screen.



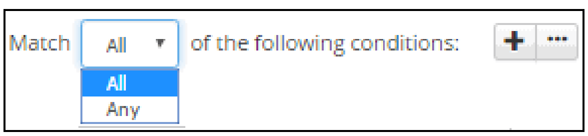
Creating Rules

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 13 and “Configuring Actions” on page 15 for more information. See “Creating Time Frame Intervals for Time-Based Rules” on page 18 for information on configuring interval time frames and actions to perform with each set of intervals.

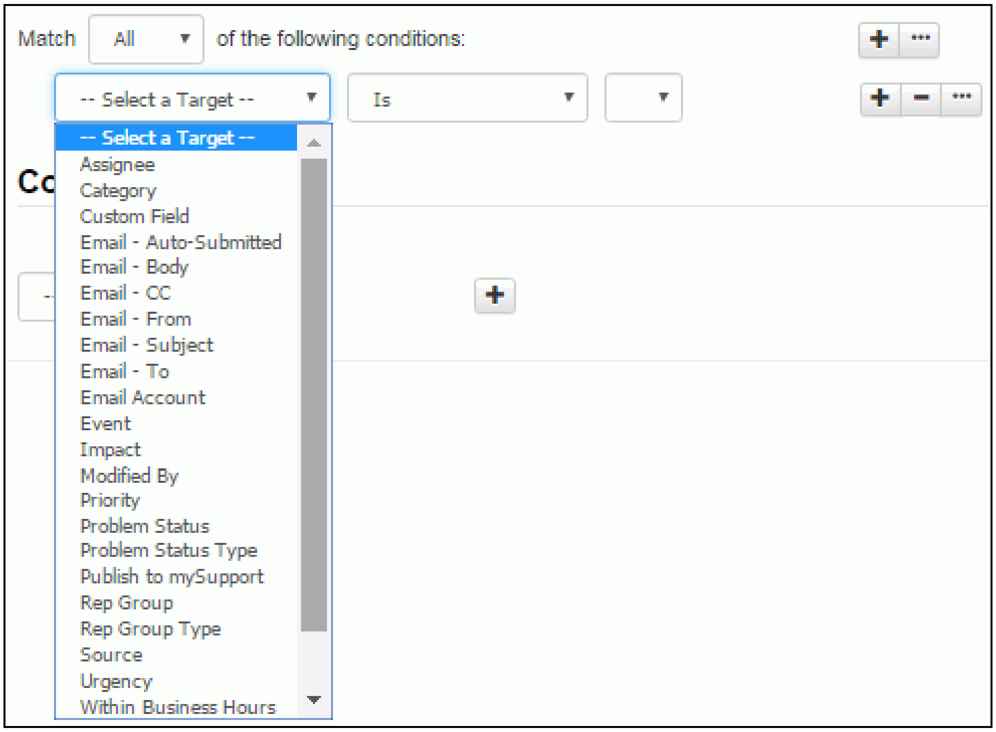
A configured **Hours of Operation** definition of 24 hours a day/seven days a week or selected date and time ranges can be used for the effective time frame for a time-based rule and for an on-save rule with a condition that includes "Within Business Hours". The default Hours of Operation definition 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

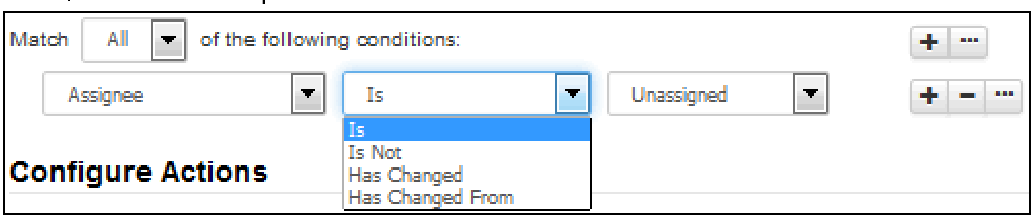
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



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 problem save. In the Select a Target dropdown, select what to evaluate: a problem field or event, or whether it is within business hours.



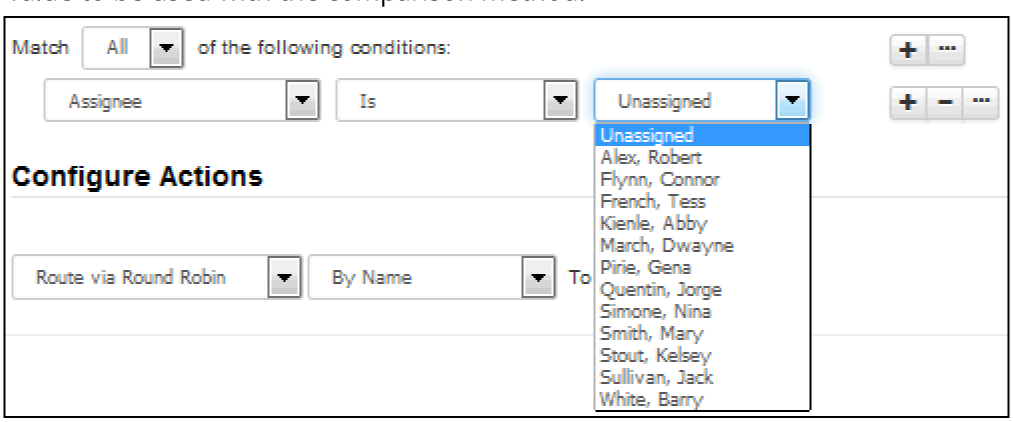
In the next dropdown, select the comparison method.



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.

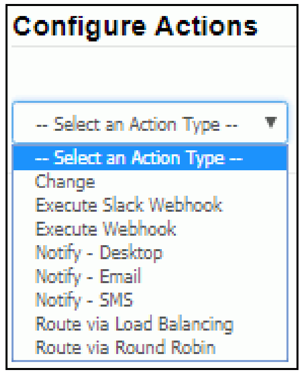


Note: If a rule contains a condition with the Work History Added to Problem event, the rule will be triggered immediately when the event occurs (even if the problem hasn't been saved). Conditions for all of the rules in the rule group will be evaluated and actions will be performed if conditions are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

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.

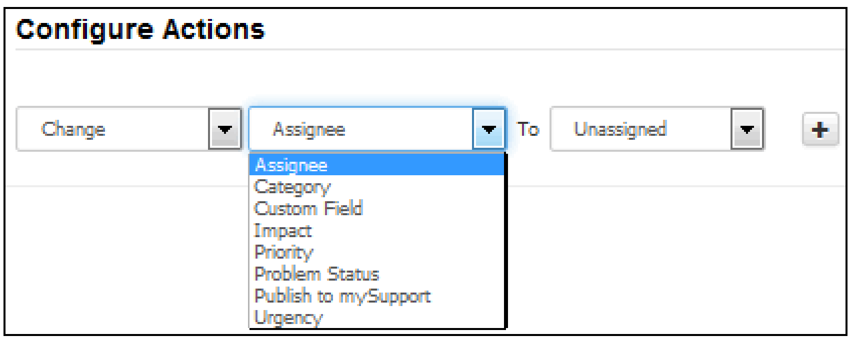
Configuring Actions

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. Use the − Remove Action option to remove any action lines.

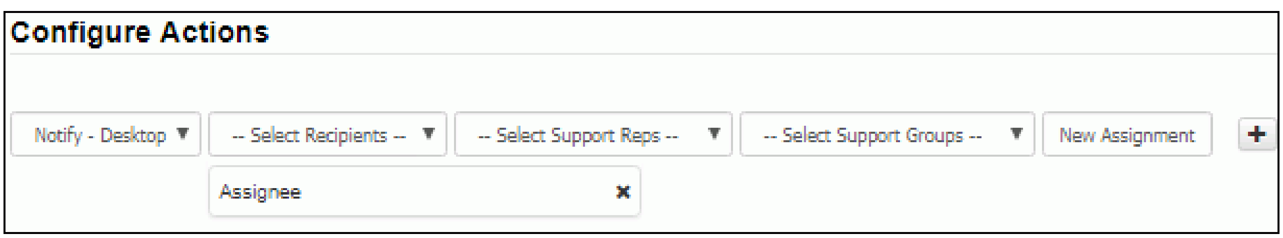


You can configure the following actions:

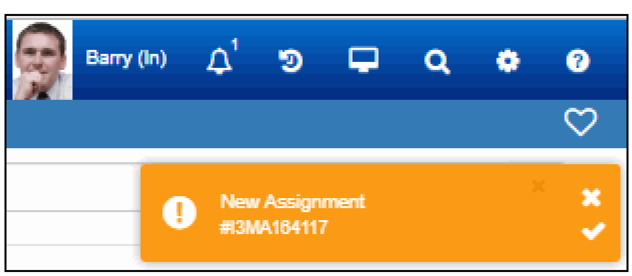
- **Change a field** by selecting Change, the field to change, and the value to change it to.



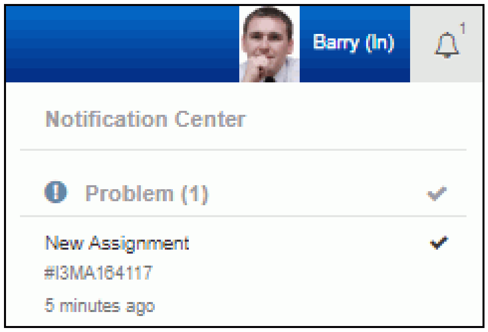
- **Send a notification** via Desktop notification, email, or SMS.
  - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



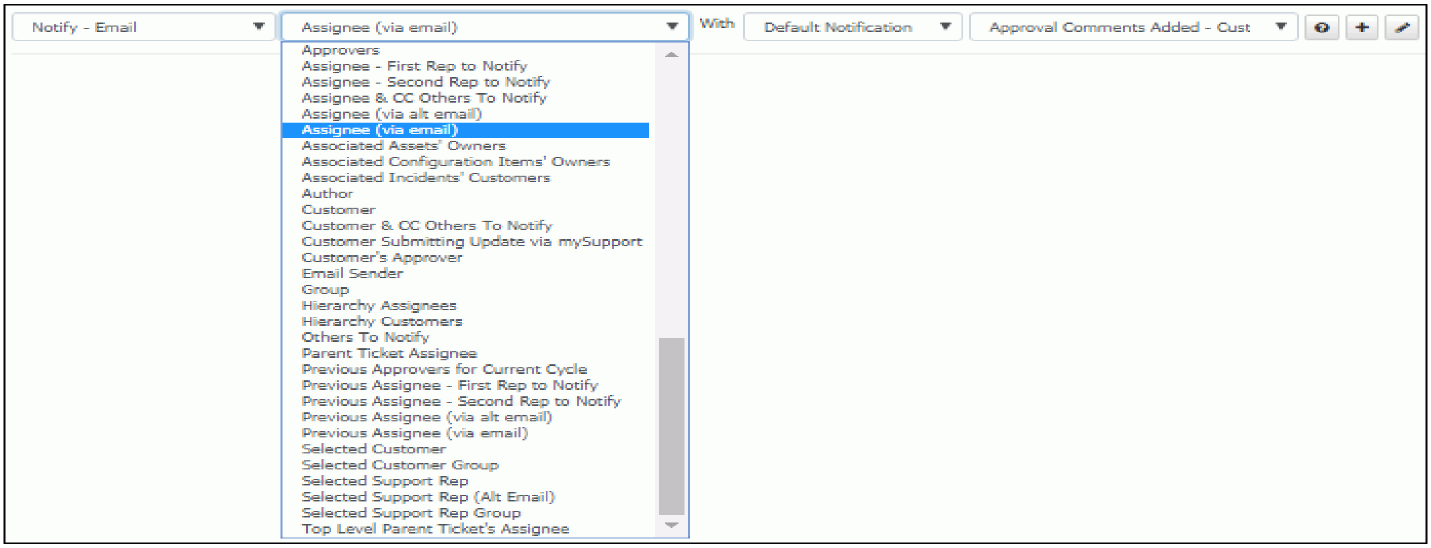
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.

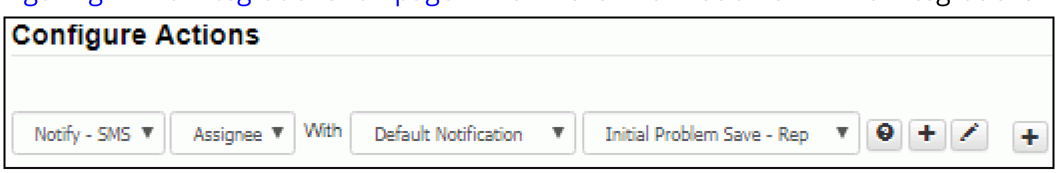


- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.

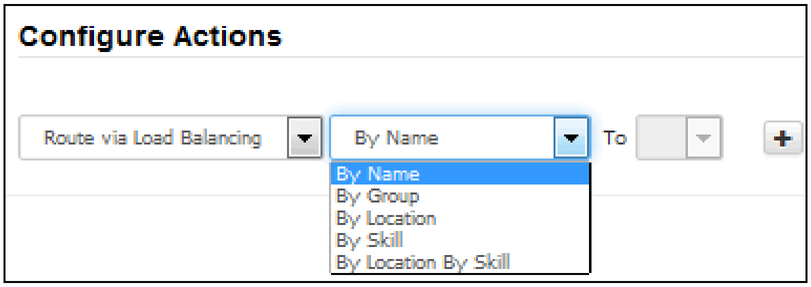


You can select the default or a custom notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient. Use the + Create New and View/Edit options to access the Custom Notification screen. Select Show Notification to display the contents of the selected notification; see "Customizing and Viewing Event Notification Content" on page 24 for more information.

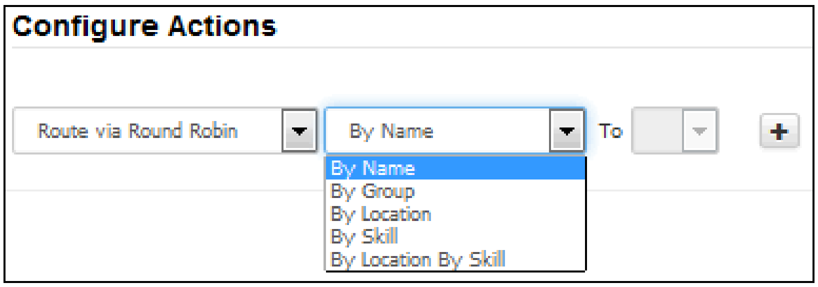
- **SMS:** To send an SMS notification, select Notify - SMS, the recipient, and the notification to be sent. The contents of the SMS Text field in the custom notification will be sent; if that field is blank or if it is a default notification, the contents of the Subject field will be used. If sending 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 27 for more information on Twilio integration.



- **Route the Problem 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 Problem Management tab in the Feature Basics screen.



- **Route the Problem 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 Problem Management tab in the Feature Basics screen.



- **Execute a configured webhook** for posting Problem data to a web application. See "Configuring Webhooks" on page 74 for more information.

Creating Time Frame Intervals for Time-Based Rules

Time-Based and Time-Based: Cumulative Rules

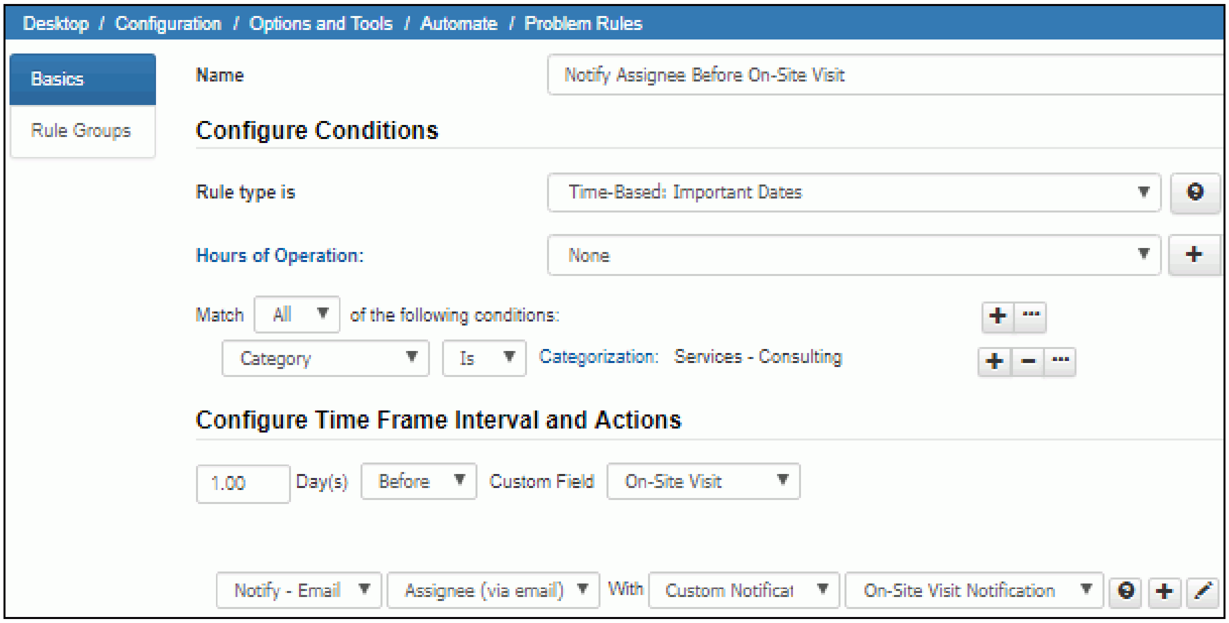
With Time-Based and Time-Based: Cumulative rules, the Time Frame Intervals and Actions section will include Intervals, Time, Minutes/Hours/Day(s) fields as well as a set of fields for entering an action to be performed when the condition is met for the interval time frame.

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. *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 problem will be monitored for eight hours after initial save; if the priority remains at Emergency for the entire eight hours, the Emergency Priority Warning - Rep notification will be sent to the assignee.

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.

Time-Based: Important Dates Rules

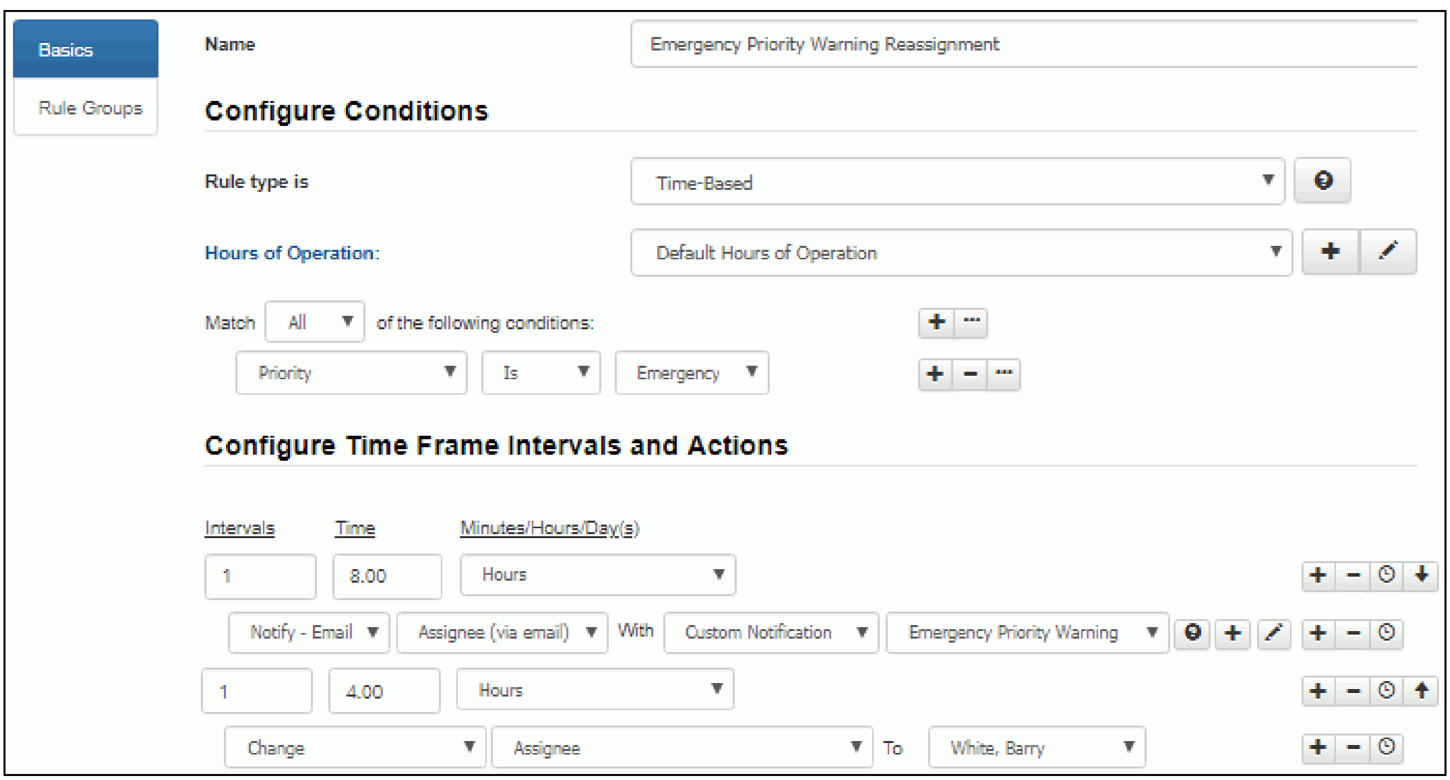
If a date or date/time custom field is created for problems, **Time-Based: Important Dates rules** enable you to specify a number of days before or after the value in a specified date field. This type of rule will be evaluated when the defined number of days before or after the value in the specified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



Configuring Multiple Time Frame Intervals

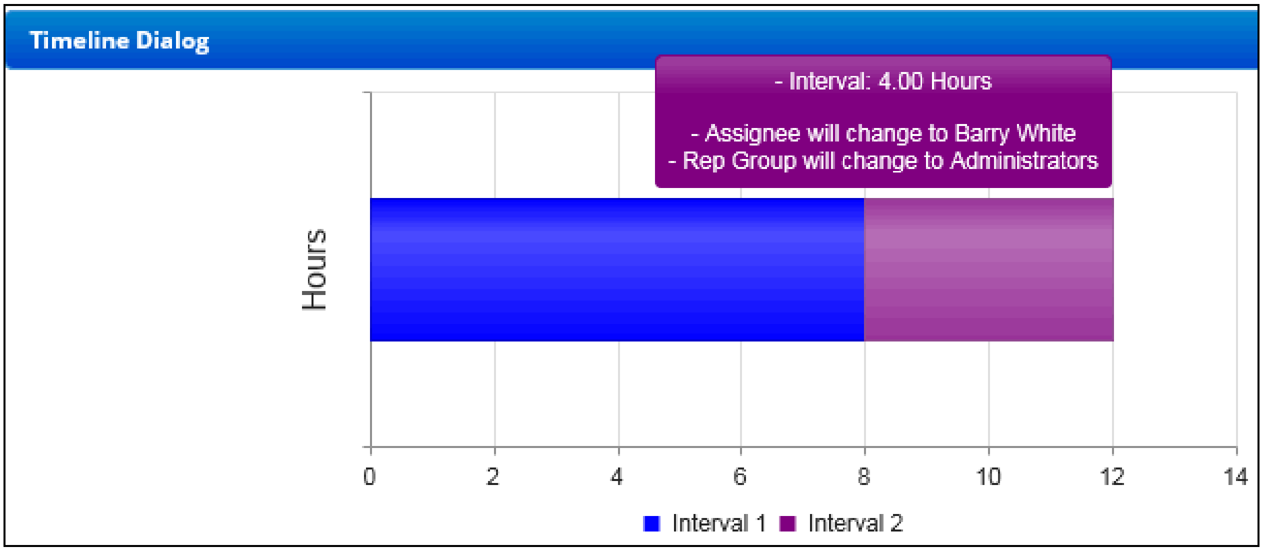
You can select Add Interval to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up options will appear for changing the order in which the interval time frames will be evaluated.

In the example below, the problem will be monitored for an eight hour time frame; if the priority remains at Emergency for the entire eight hours, the Emergency Priority Warning notification will be sent to the assignee via email. The problem will then be monitored for an additional four hour time frame; if the priority remains at Emergency for the entire four hours, the problem will be reassigned to the support representative Barry White.



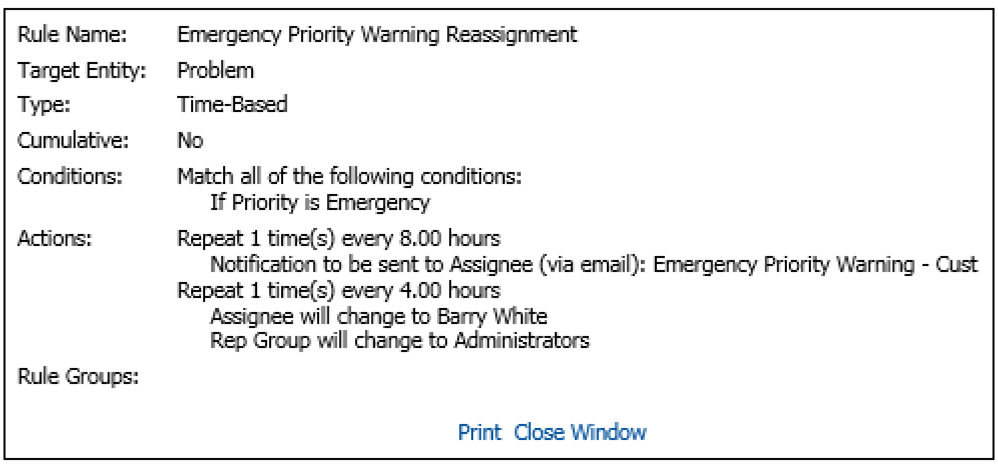
Displaying a Timeline for Configured Time Frame Intervals

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.



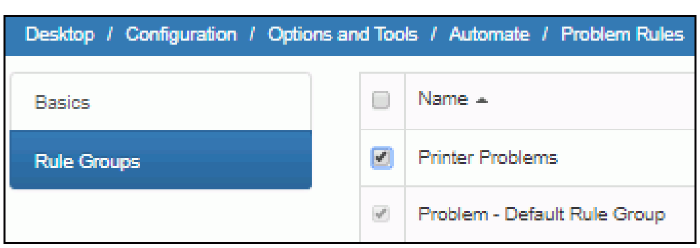
Printing a Rule

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.

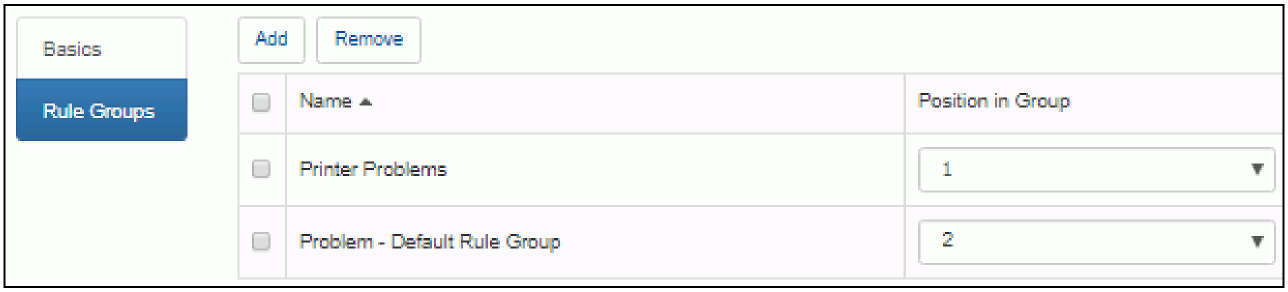


Associating Rules With Rule Groups

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.



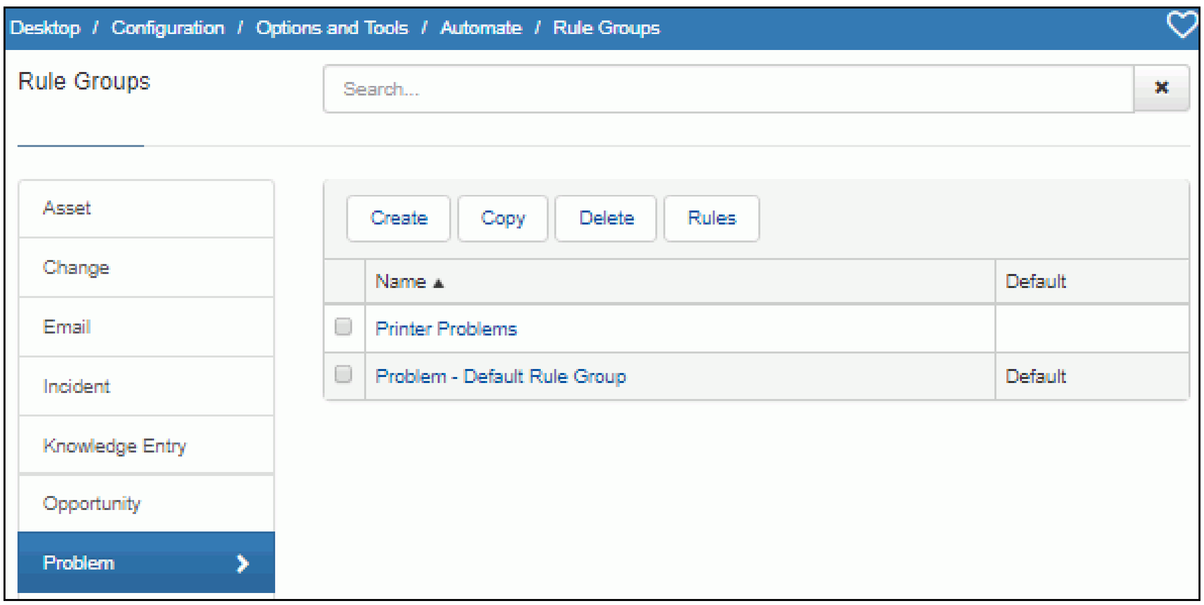
The rule group displays along with its position as shown in the example below:



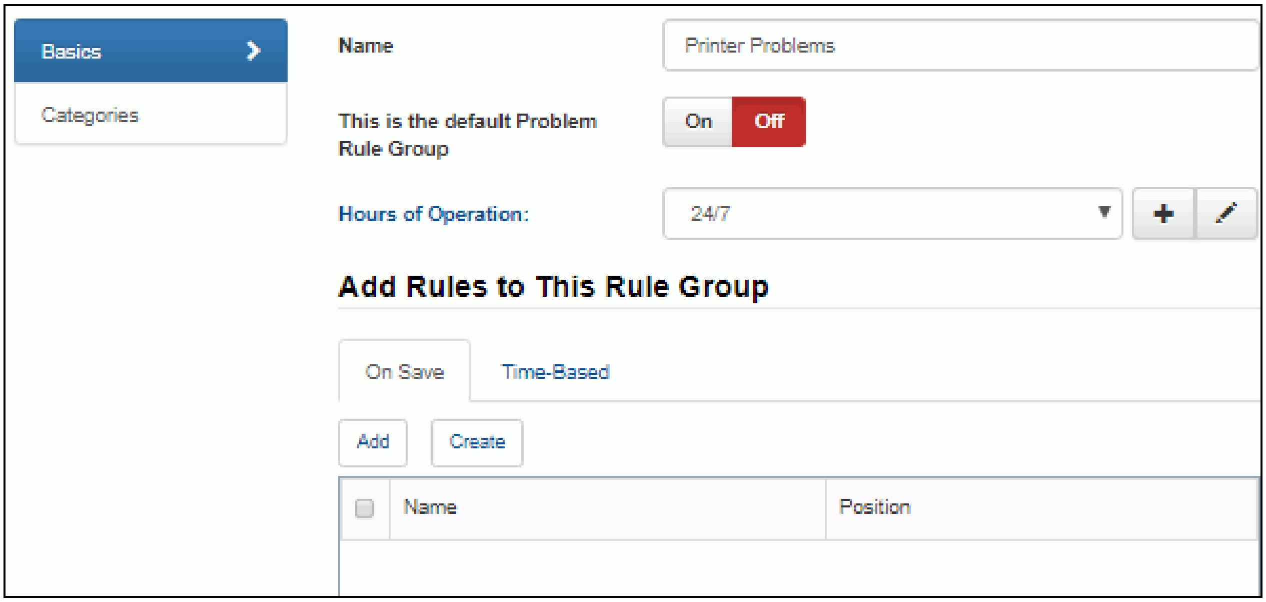
All rules in the rule group associated with a problem are evaluated when a problem is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

Click the Create link in the Problem Rule Groups screen to create a rule group that can be used as default and/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 Problem screen when the rule group is in effect for a problem.

This is the Default Problem 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 problem. One rule group must be designated as default for problems.

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 problem are evaluated when a problem 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 to a Categorization

Use the Add link on the Categories tab to associate the rule group with one or more categories; when the category combination is selected for a problem, the rule group will be applied. You can also associate a rule group with a category combination via the Category screen.

Printing the Rule Group Summary

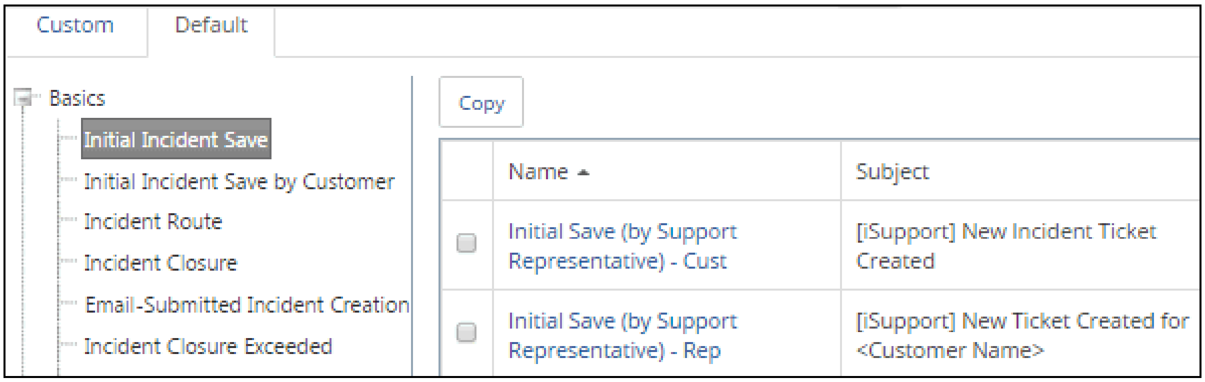
Click the Print button to display a summary of your saved entries; you can click the Print link in the dialog to send the information to the printer.

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

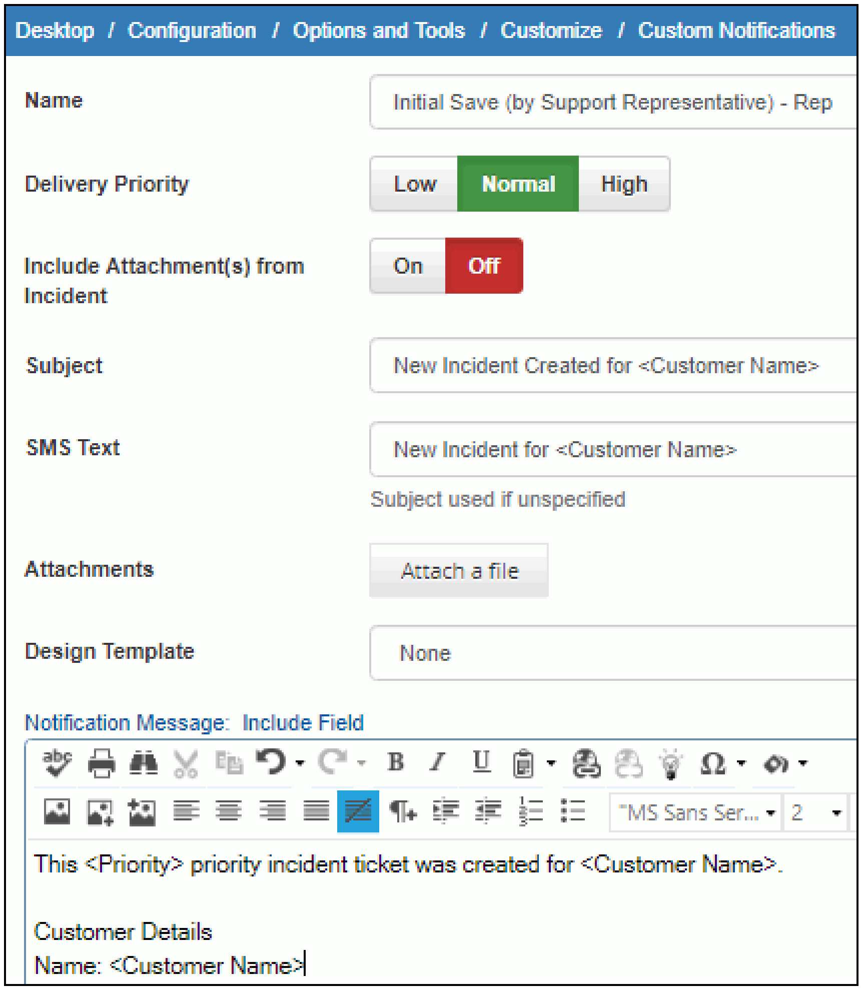
Recipients for default notifications can include both support representatives and customers, and the default notification text is different for each. Support representative notifications (designated as "Rep") typically contain customer details, the priority, the assignee, the URL to Desktop incident, 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 26 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.

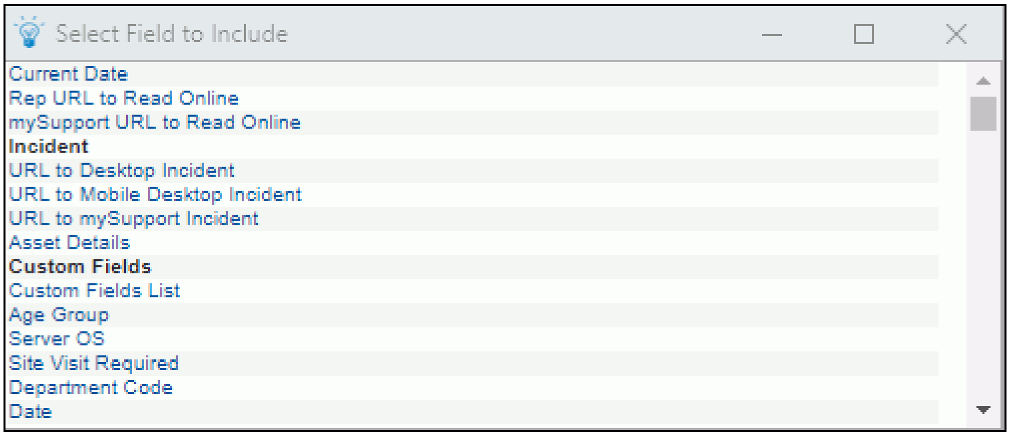
If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. See "Configuring Twilio Integrations" on page 27 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).



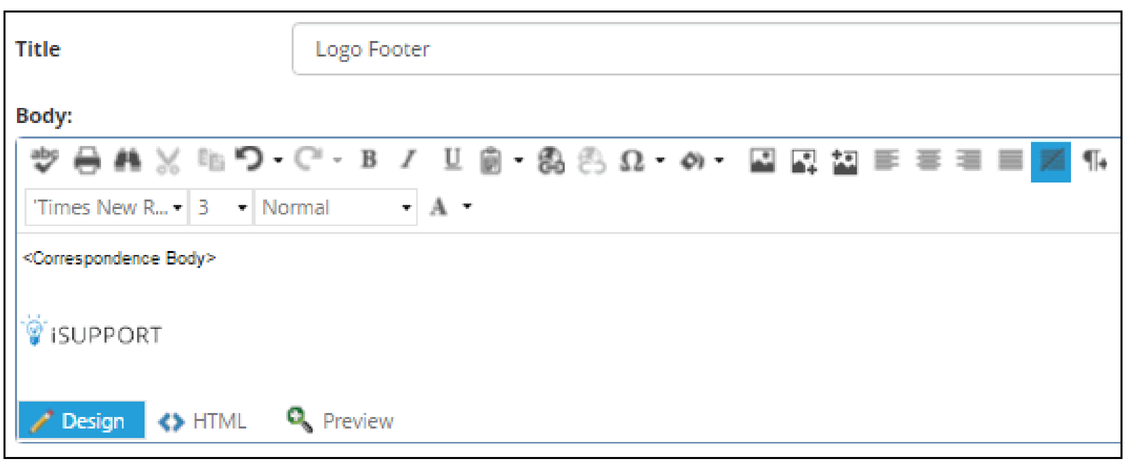
Include Attachment(s) from <record type> - For all modules except Asset, CMDB, Discussion Posts, Security, and Alerts, select this checkbox to associate any attachments from the referenced work item type to the notification when it is sent.

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

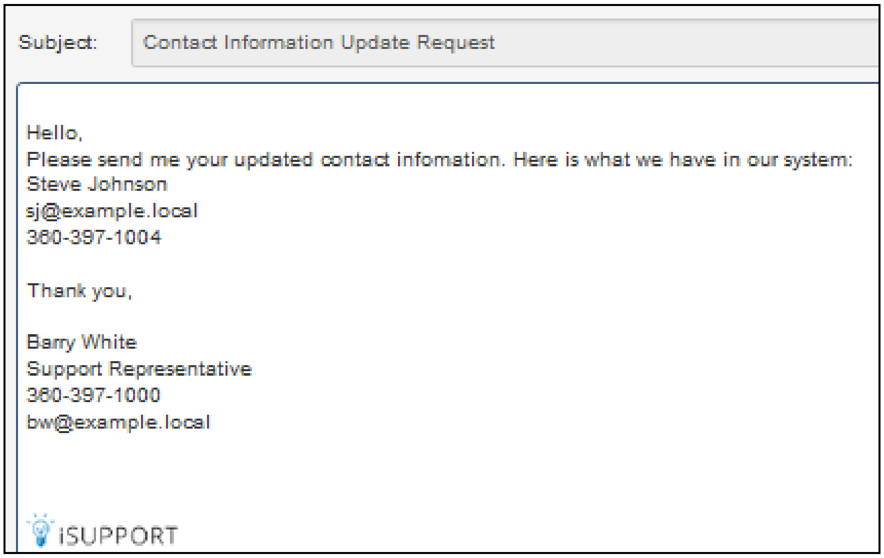
Note: If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

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.

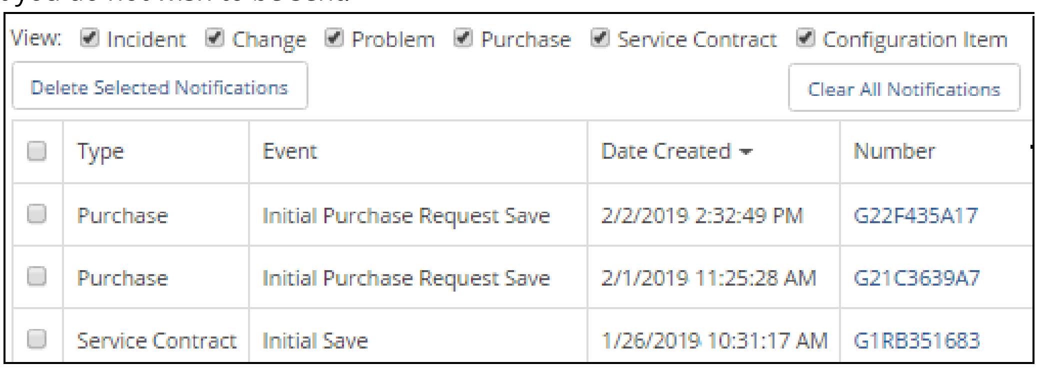


If a support representative sending a correspondence with the design template has a signature block, design elements that are after the <Correspondence Body> tag will appear after it.



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.



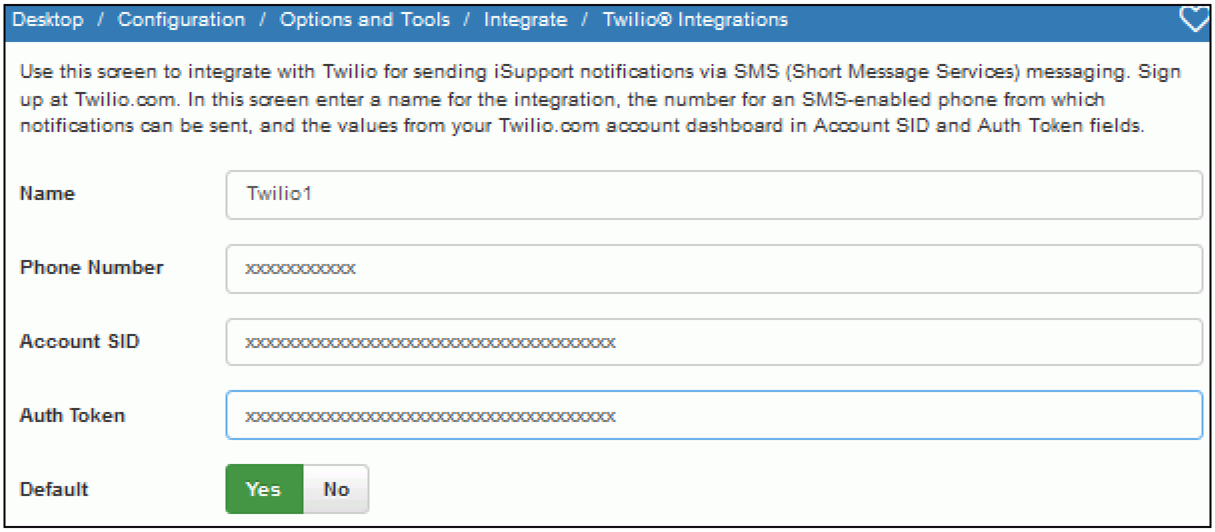
Configuring Twilio Integrations

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.

Defining Custom Status Labels

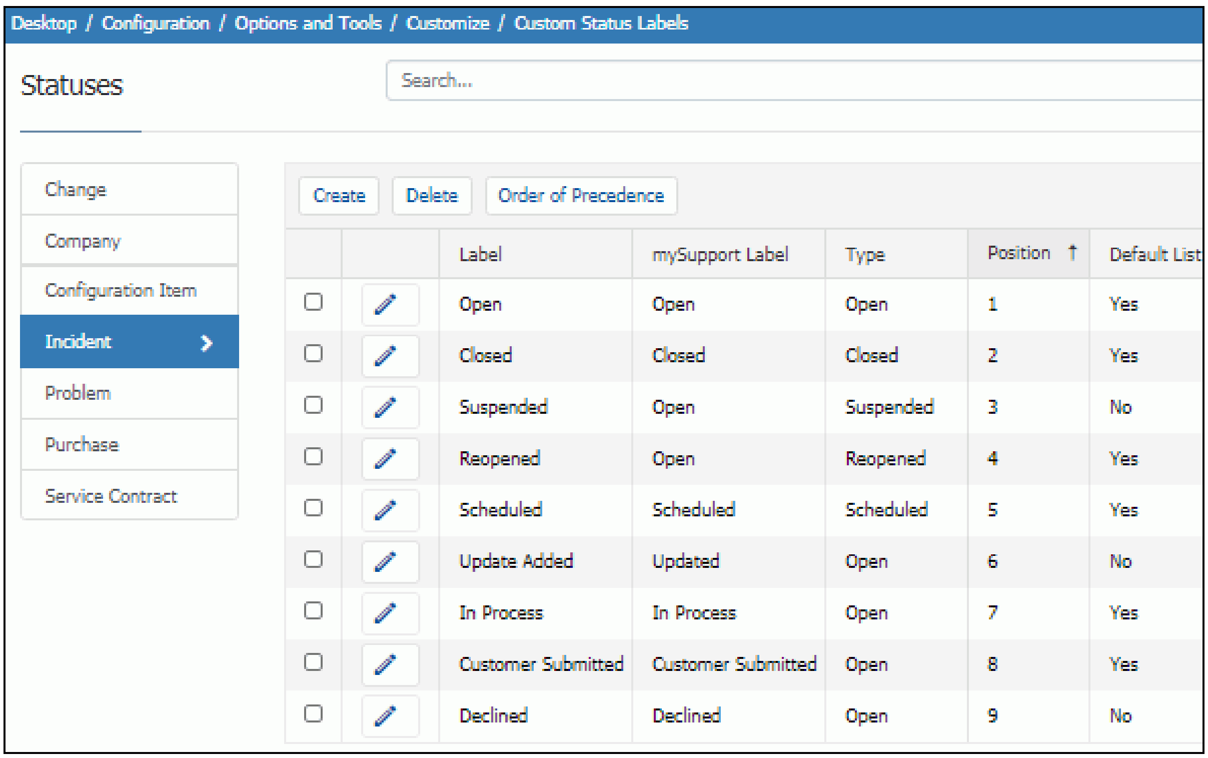
Use the Options and Tools | Customize | Custom Status Labels screen to create custom labels for iSupport's work item status levels. These labels will be included in views and reports, and will appear for selection in work item screens; however, you can restrict access via the Template and Support Representative 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 - 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.)

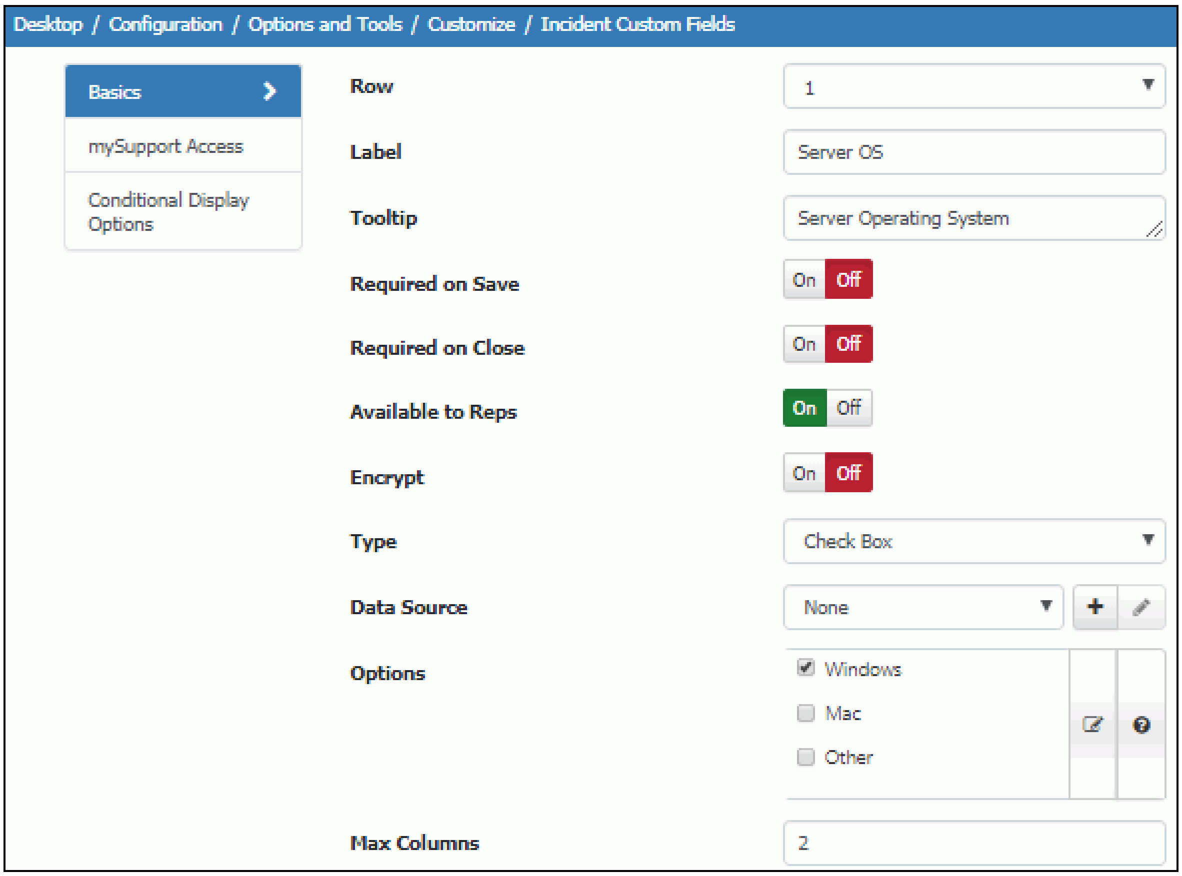
Default List (incidents/changes) - Enable to include the status as an available option in the default list that will appear in the Status field when a support representative creates a new incident or change. If not enabled, the status will only display if configured for a template that has been applied, 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.

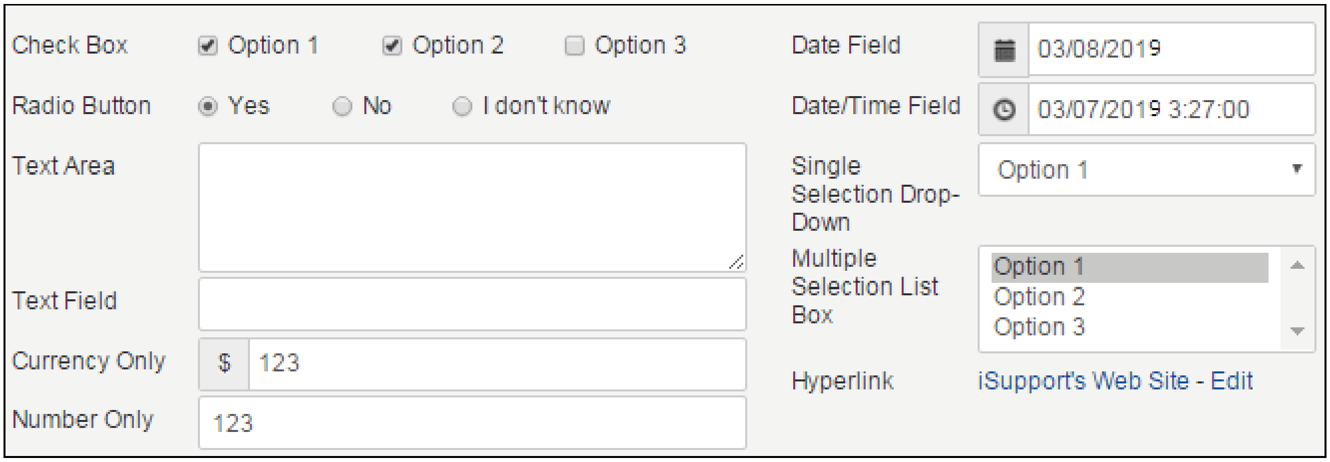
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see "Pulling From a Data Source" on page 36 for more 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 36 for more information.

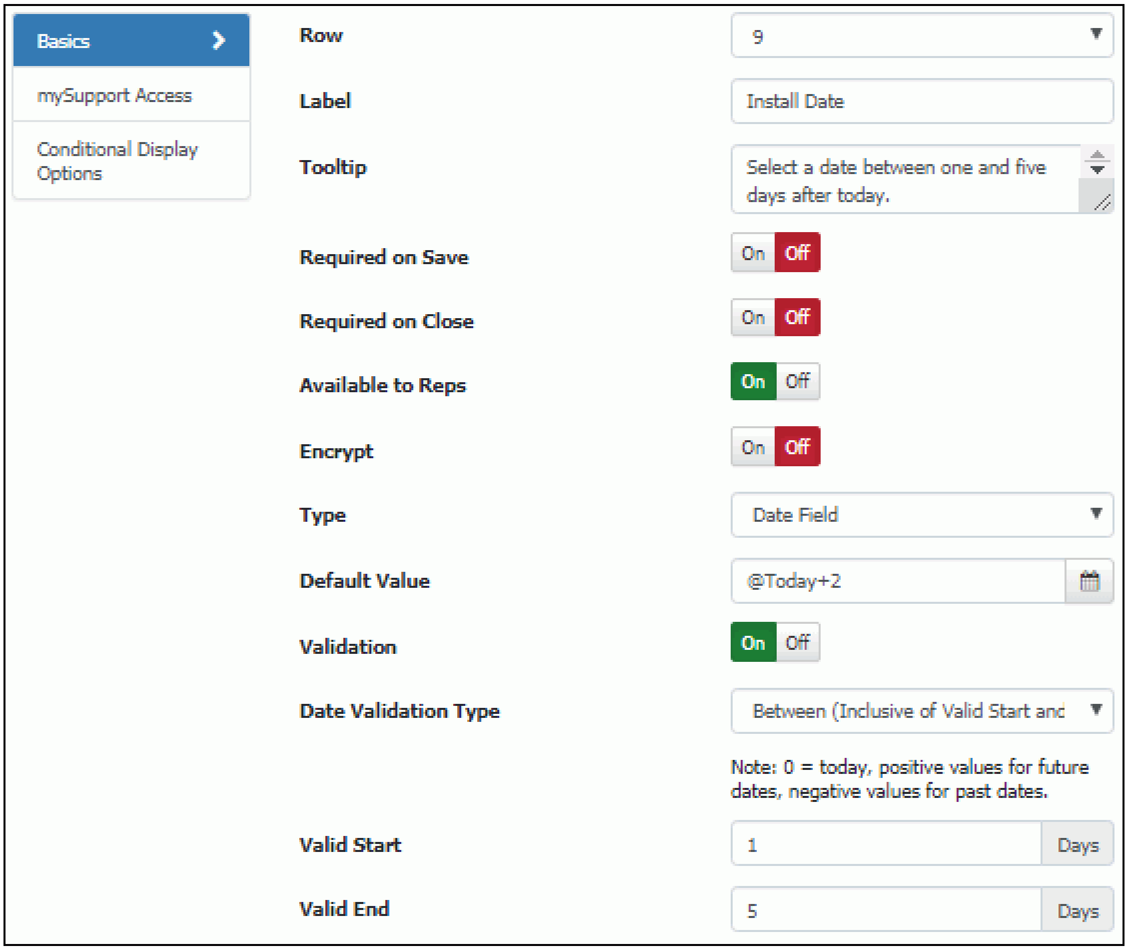
Default Value - Enter a value to appear as an option in the custom field by default.

- 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.)

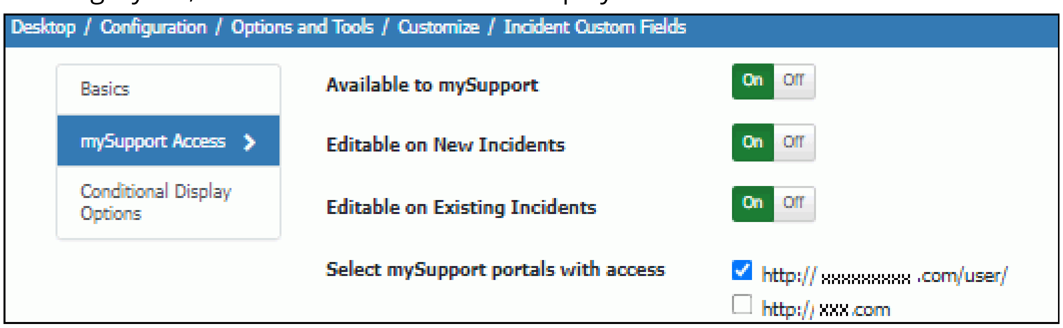
mySupport Access Options

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.

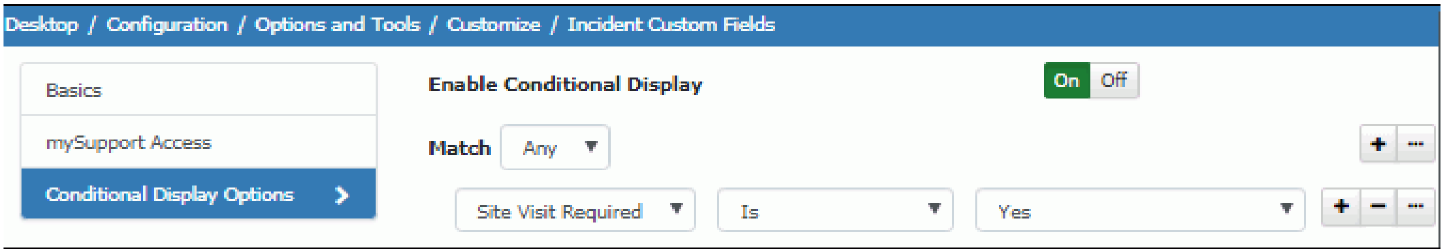


Setting Advanced Options

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

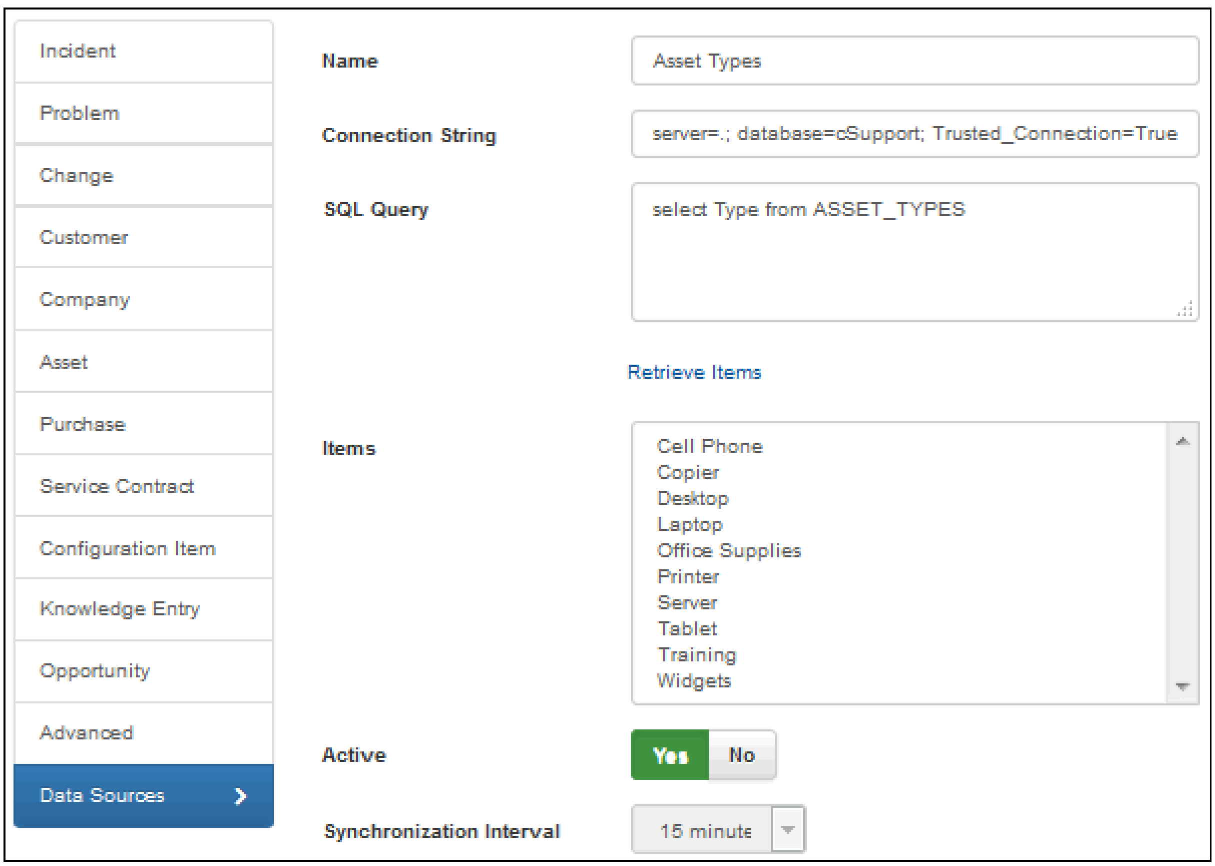
Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.



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.

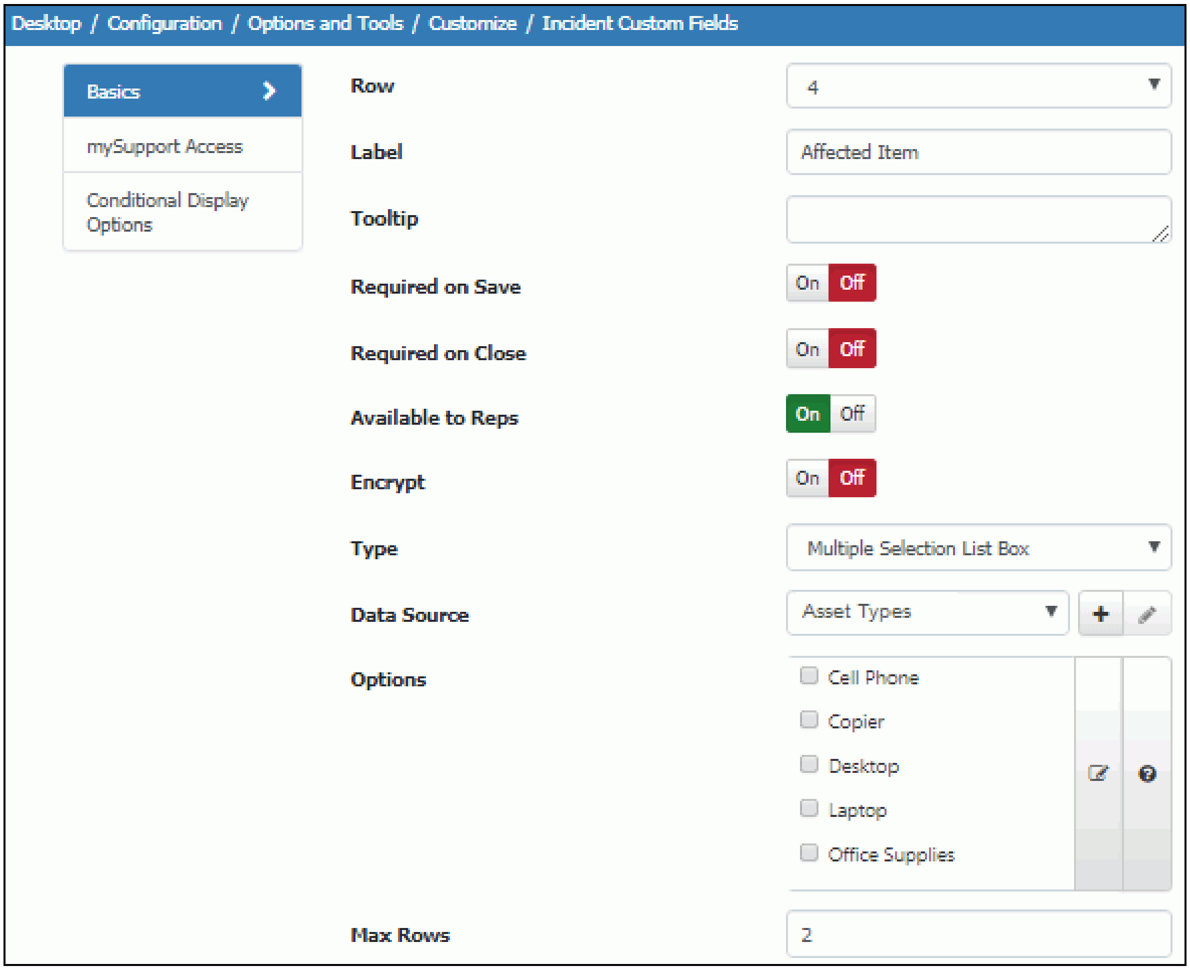
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Select the Retrieve Items button to populate the Items field using this string.

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.



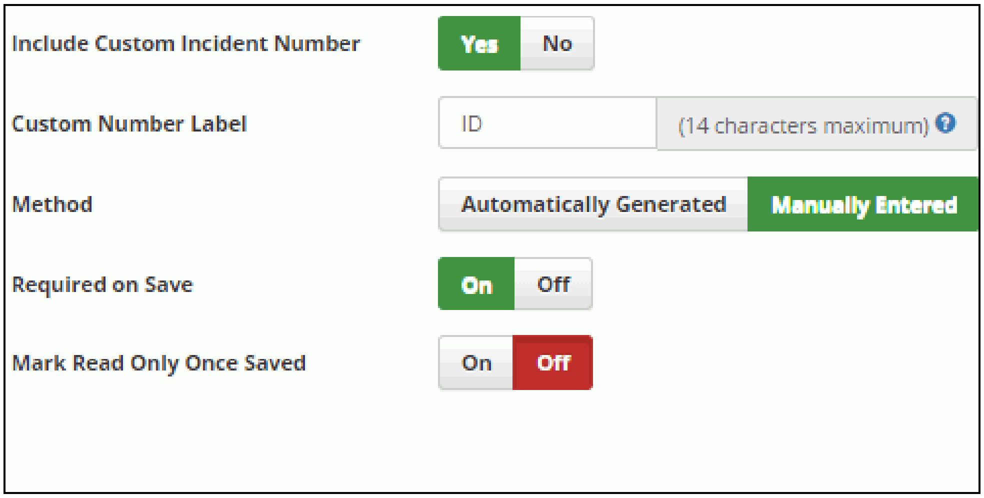
Defining Custom Numbers

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.

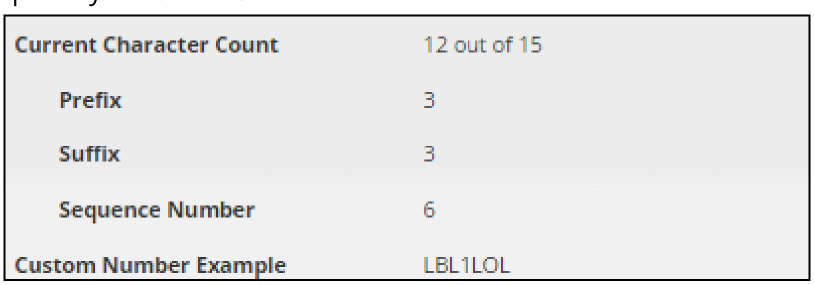
Configuring a Manually Entered Number

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

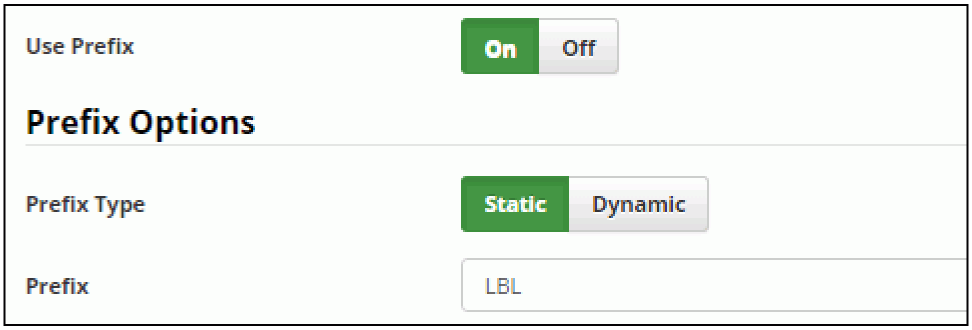
The Automatically Generated option creates numbers automatically based on prefix, suffix, and sequence settings that you configure. You can either use a static (fixed) custom prefix and suffix, restricted via a start and end number if desired. Prefixes and suffixes can be static (fixed) or dynamic; however, 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.



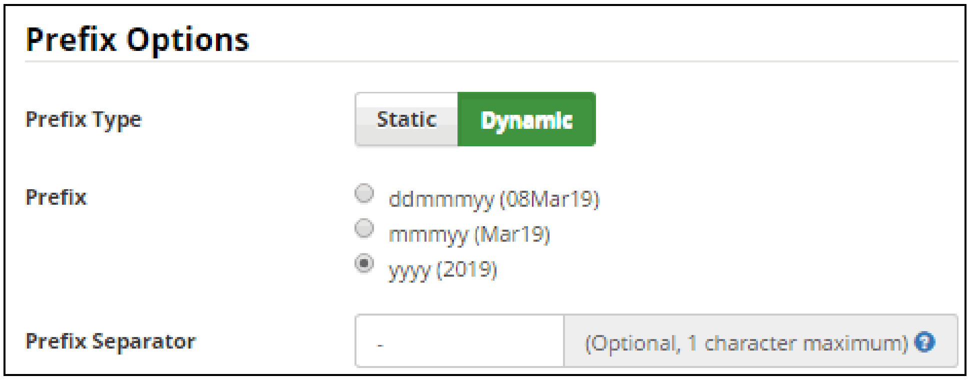
<u>Configuring the Prefix</u>

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.



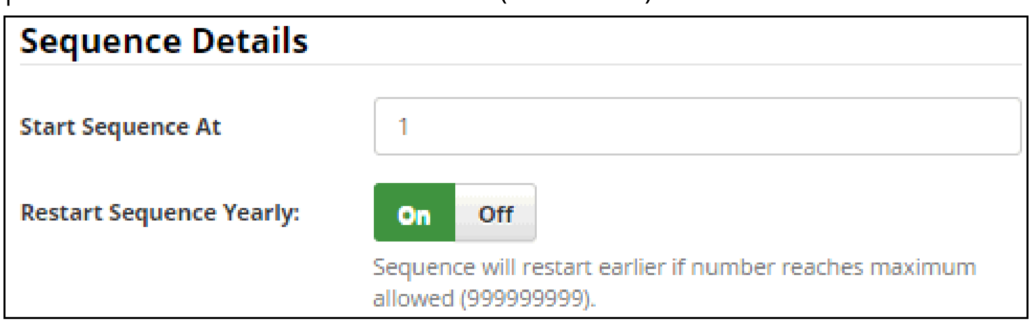
- If using a Dynamic prefix type, select the day, month, and year combination in the Prefix field. You can optionally enter a character (such as a hyphen) in the Prefix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



<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.

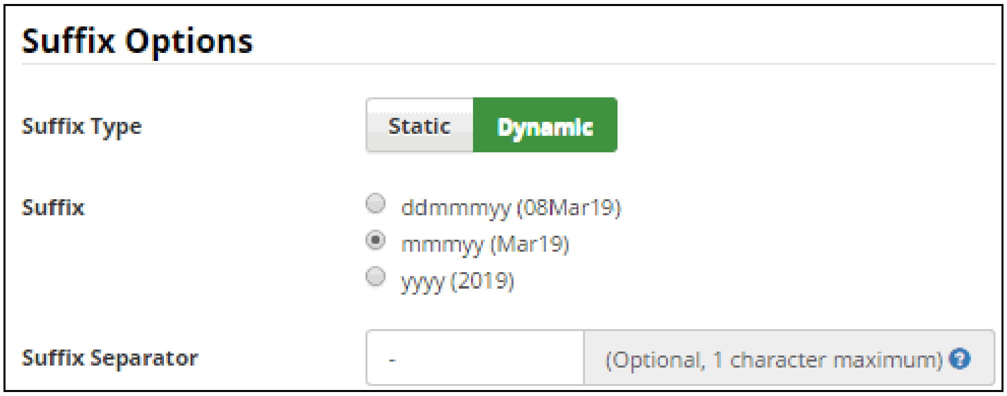
- Enter the number to start the sequence in the Start Sequence At field.
- Your selection in the Prefix field will determine the Restart Sequence field. If you select yyyy and you wish to restart the sequence when the first work item is created after 12:00pm on December 31, select Yes in the Restart 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).



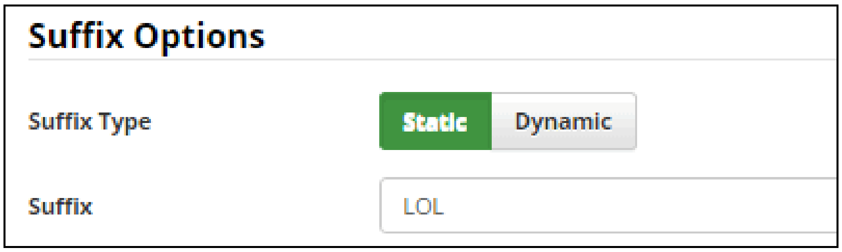
<u>Configuring the Suffix</u>

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.



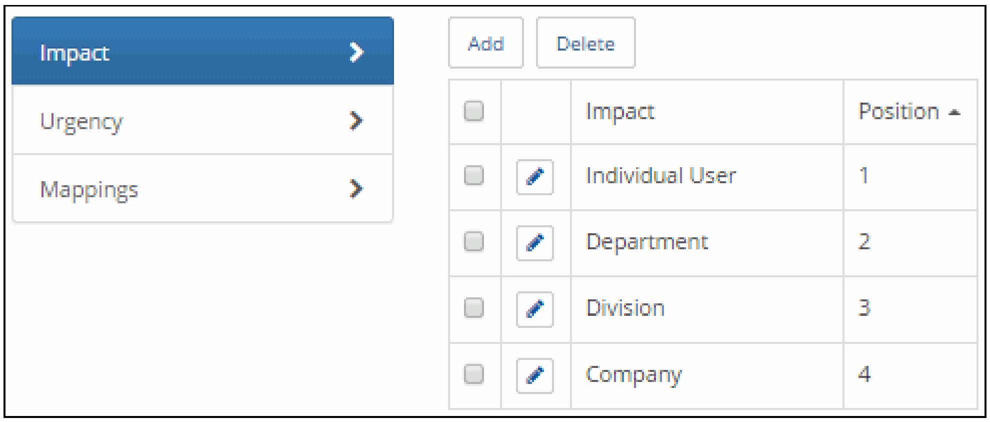
Defining and Mapping Impact and Urgency Values

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.

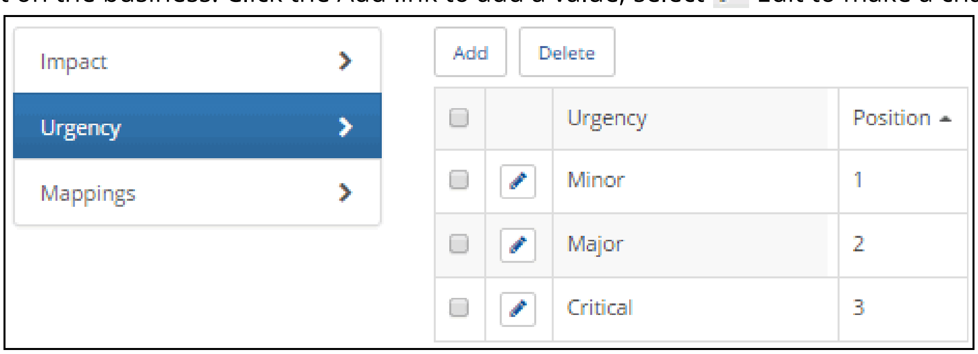
Adding Impact Values

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.



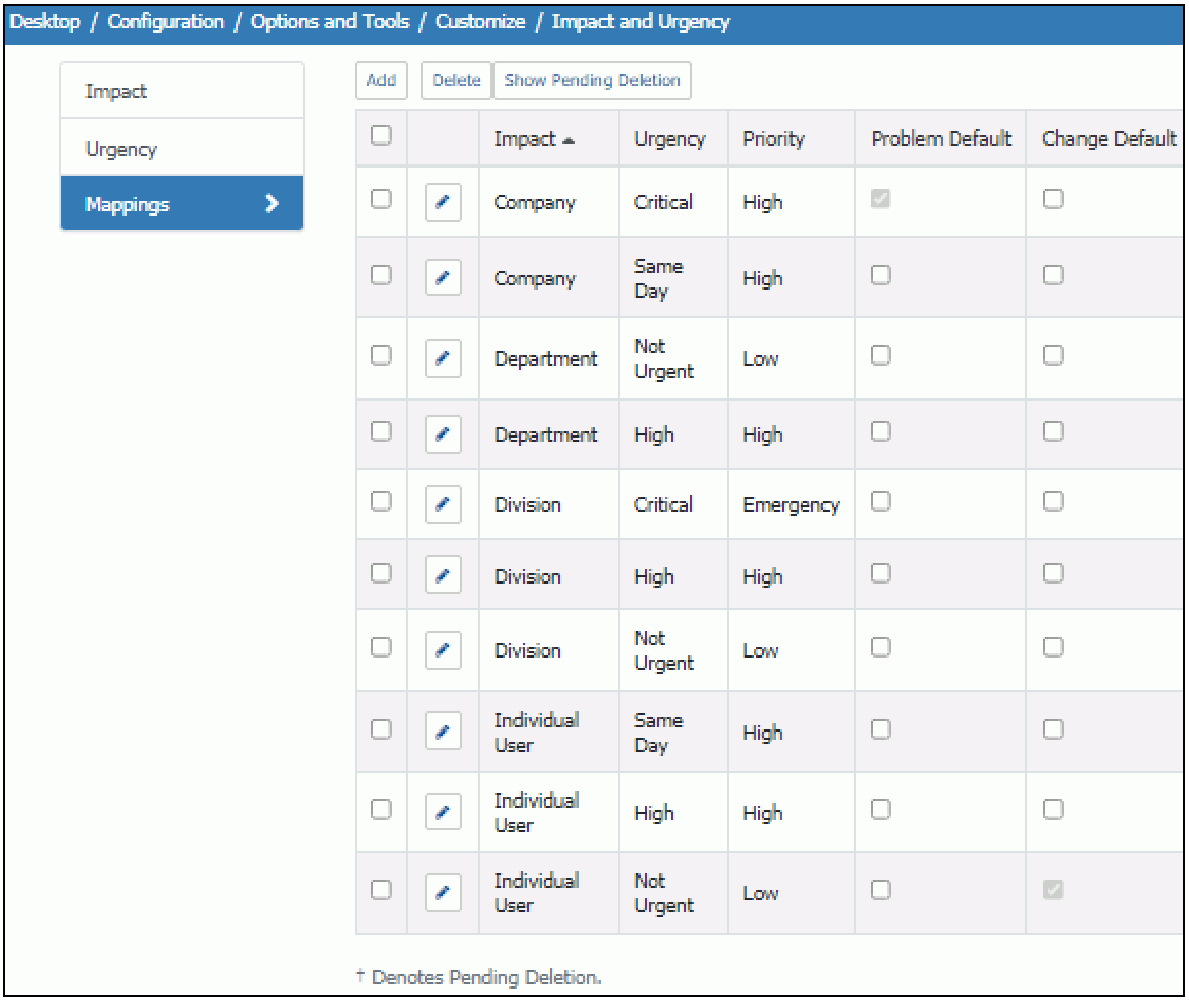
Adding Urgency Values

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.



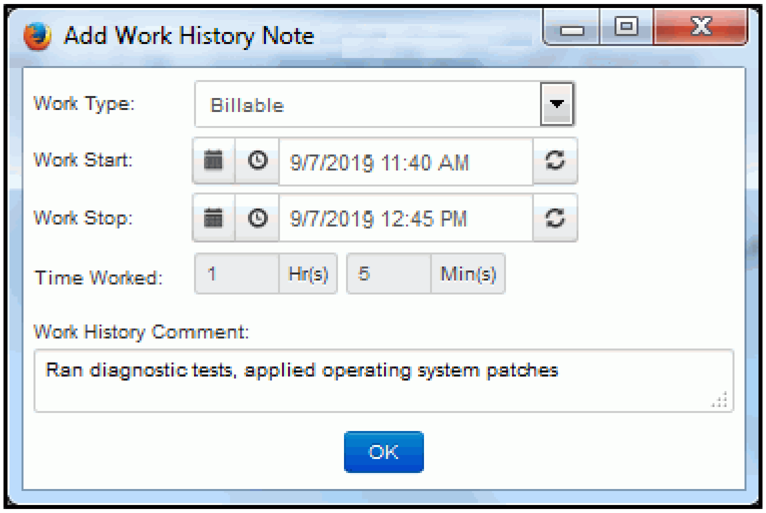
		Impact	Urgency	Priority	Problem Default	Change Default
☐	✎	Company	Critical	High	☑	☐
☐	✎	Company	Same Day	High	☐	☐
☐	✎	Department	Not Urgent	Low	☐	☐
☐	✎	Department	High	High	☐	☐
☐	✎	Division	Critical	Emergency	☐	☐
☐	✎	Division	High	High	☐	☐
☐	✎	Division	Not Urgent	Low	☐	☐
☐	✎	Individual User	Same Day	High	☐	☐
☐	✎	Individual User	High	High	☐	☐
☐	✎	Individual User	Not Urgent	Low	☐	☑

† Denotes Pending Deletion.

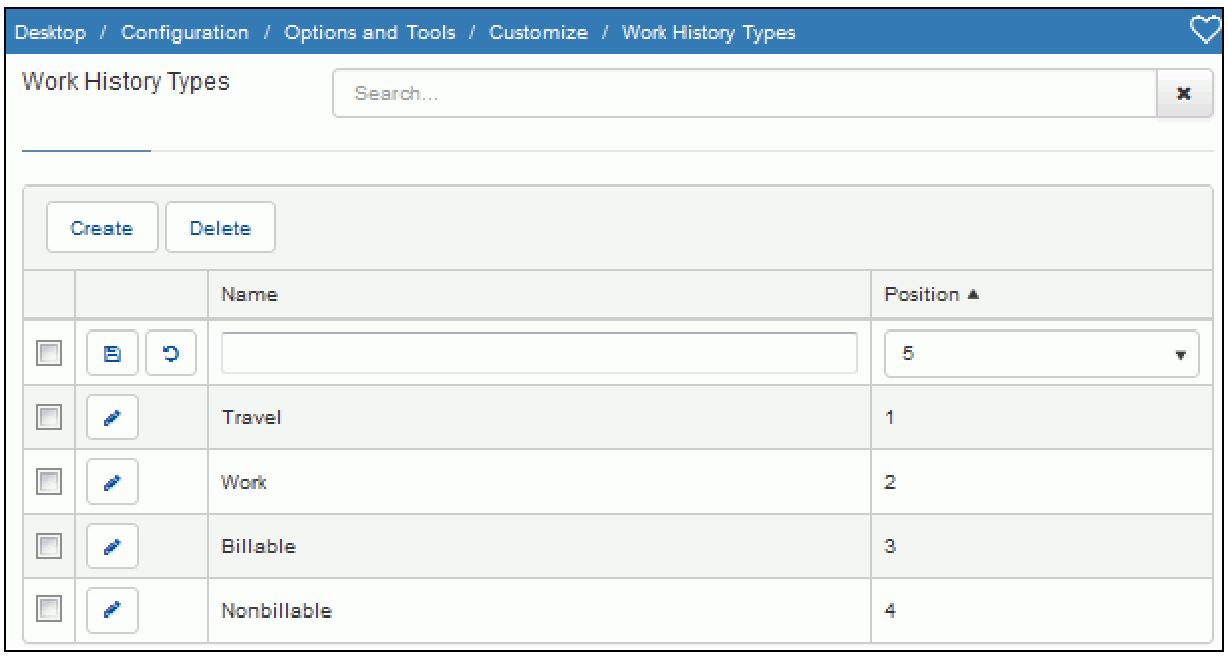
You can use the Show Pending Deletion link to display records that have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes these records. When the Show Pending Deletion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

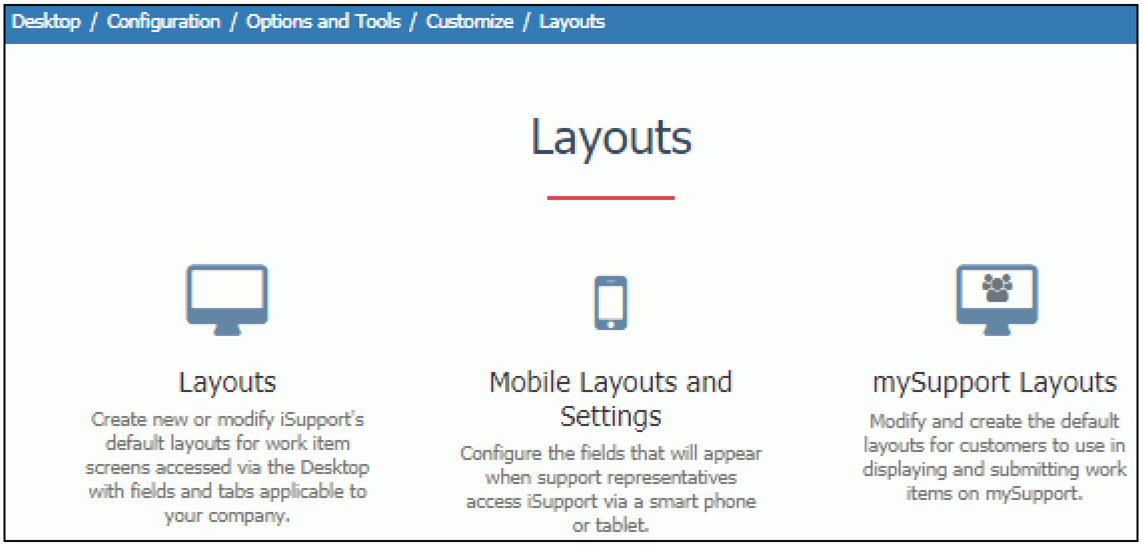


Use the Name field to enter work history types. In the Position field, select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)



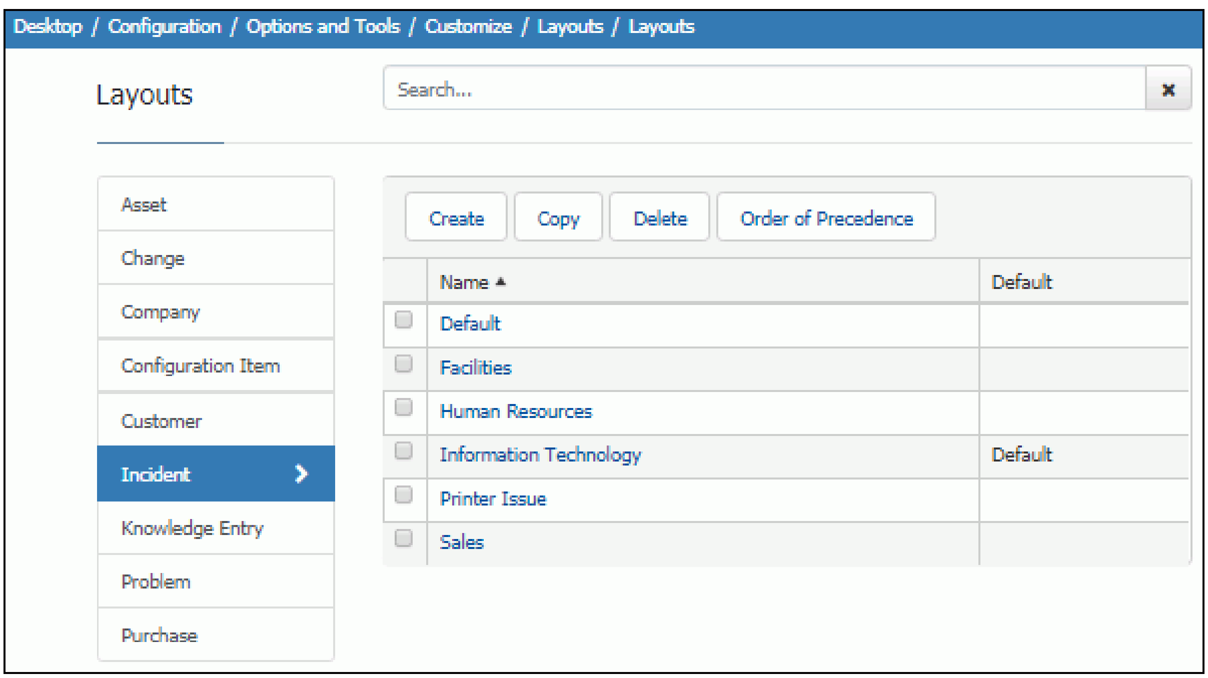
Configuring Screen Layouts

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.



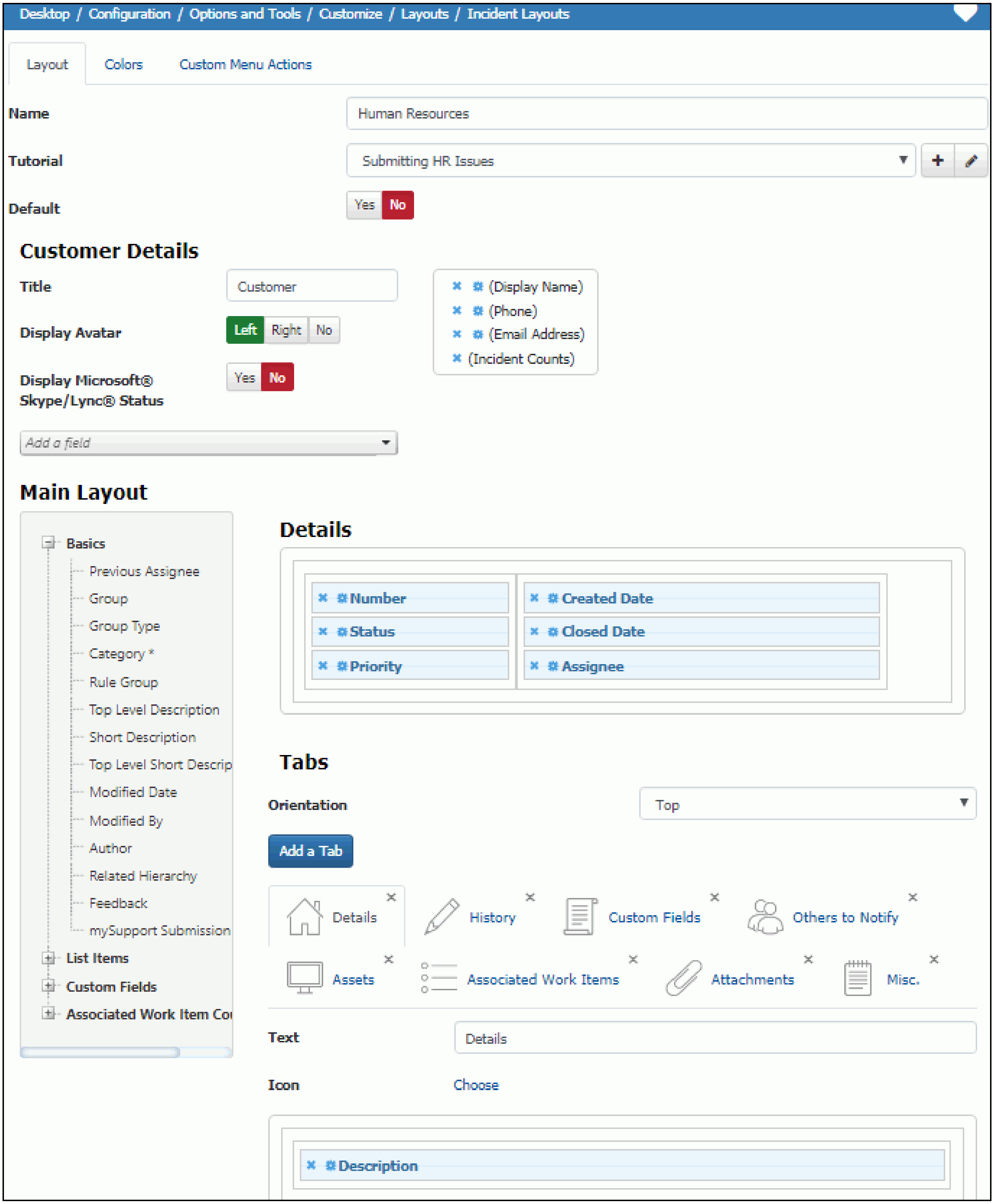
Note that only layouts configured via the Global Settings | Mobile Settings screen will apply to the mobile HTML5 interface. Also, mySupport Customer layouts will appear when the customer selects the View Complete Profile button in the Account Settings screen on a mySupport portal.

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

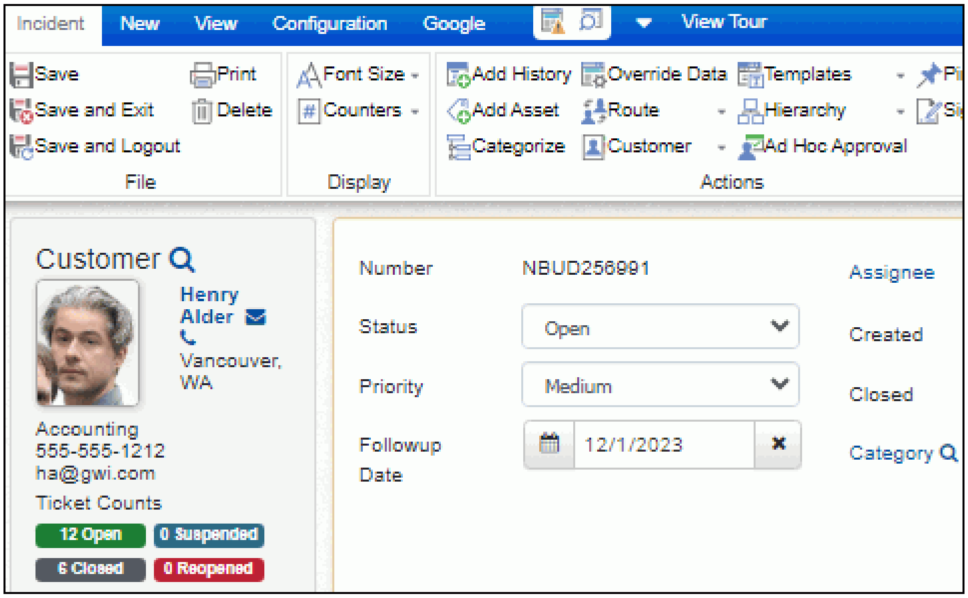
Rep Incident and Change Screens

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.

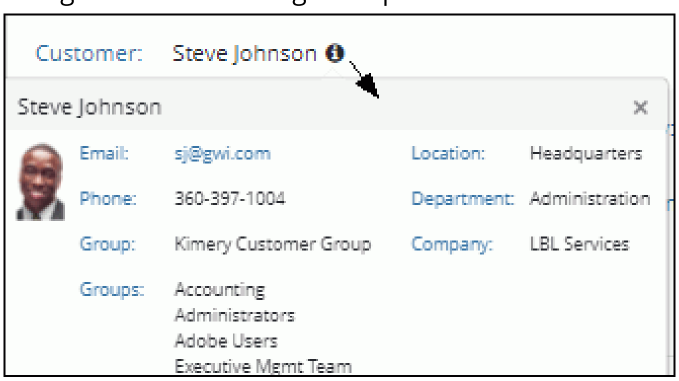


Use the **Display Microsoft® Skype/Lync® Status** field to include an icon that will display the Microsoft Skype/Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Skype/Lync functions. In order for the icon to appear, Microsoft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

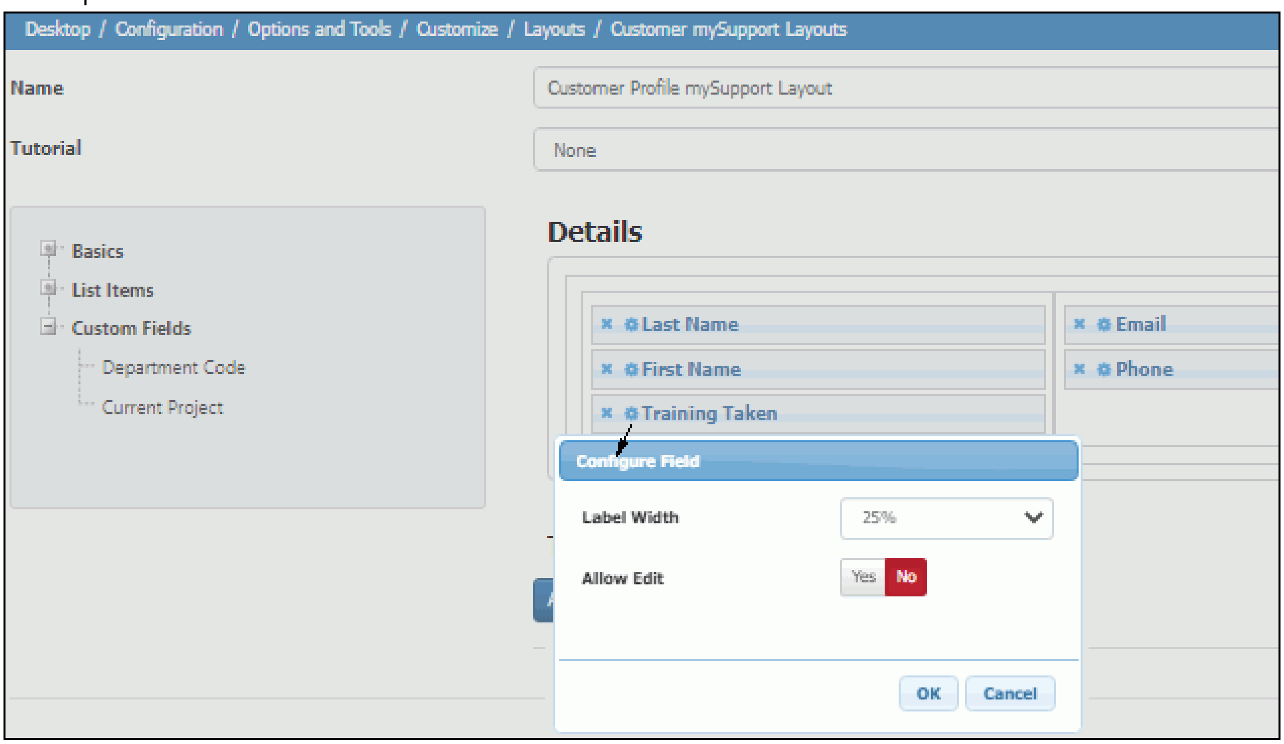


- Individual fields under the Customer Fields section

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.

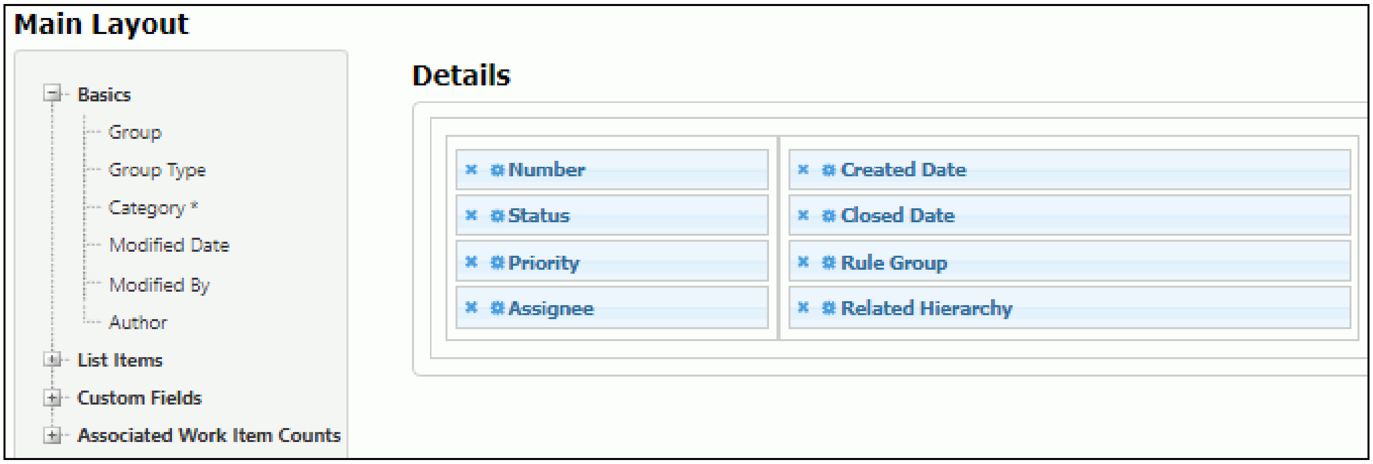
mySupport Customer Profile Custom Field Edit Access

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.

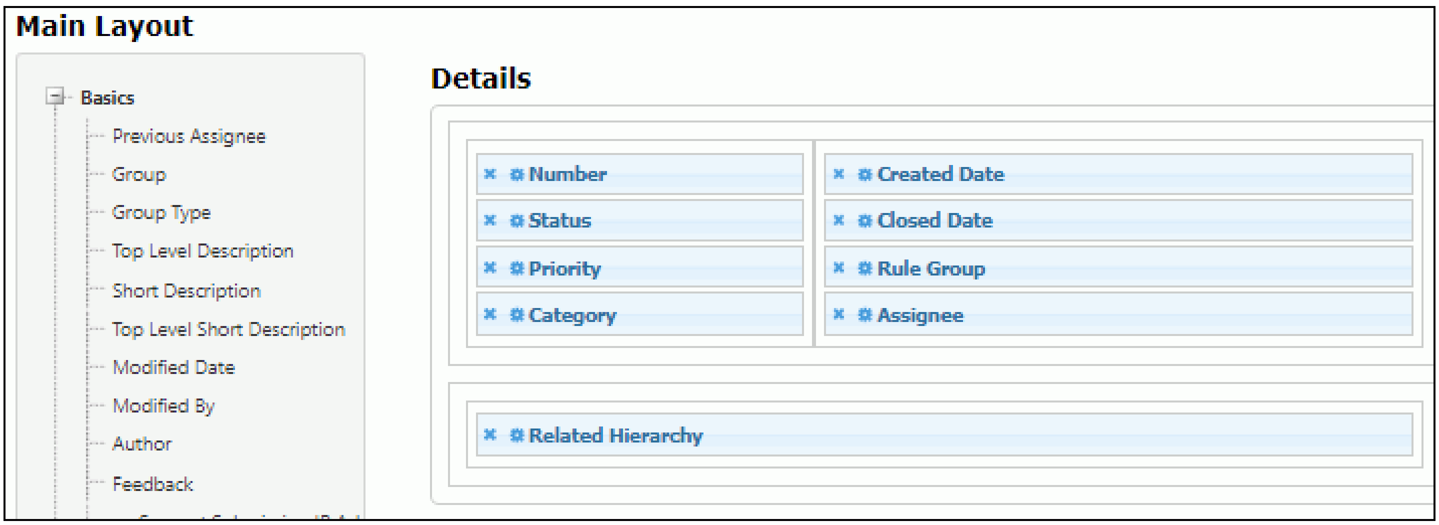


Adding Fields and Tabs

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.

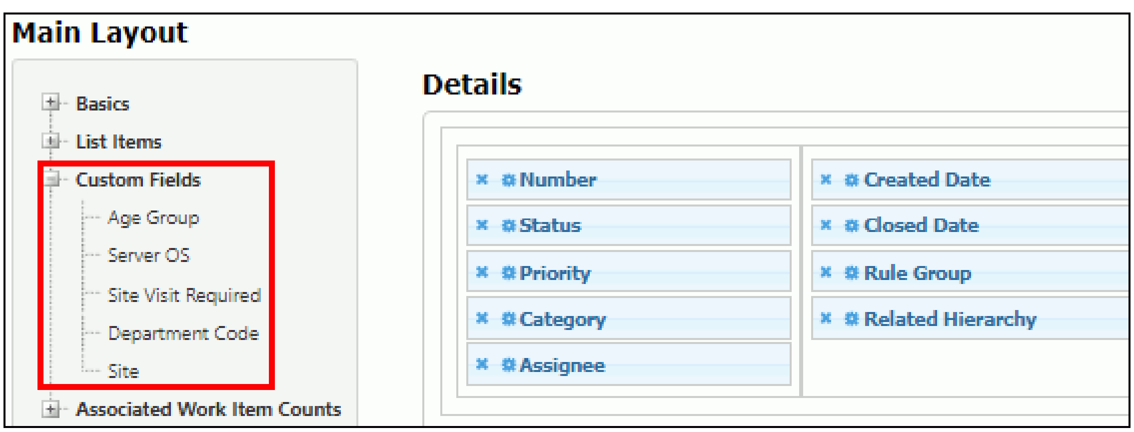


You can drag a field to the lower part of the Details section to create a subsection for a field.

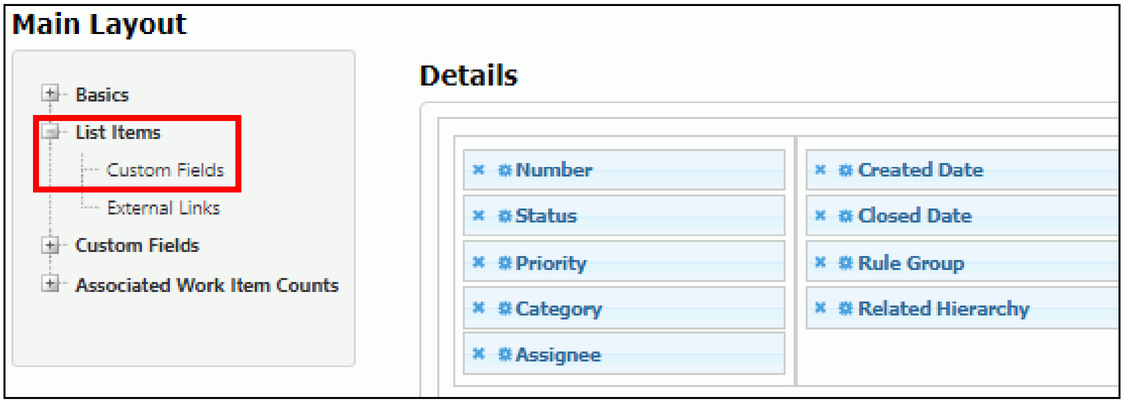


Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, or CI type. To include custom fields on a layout, you can:

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

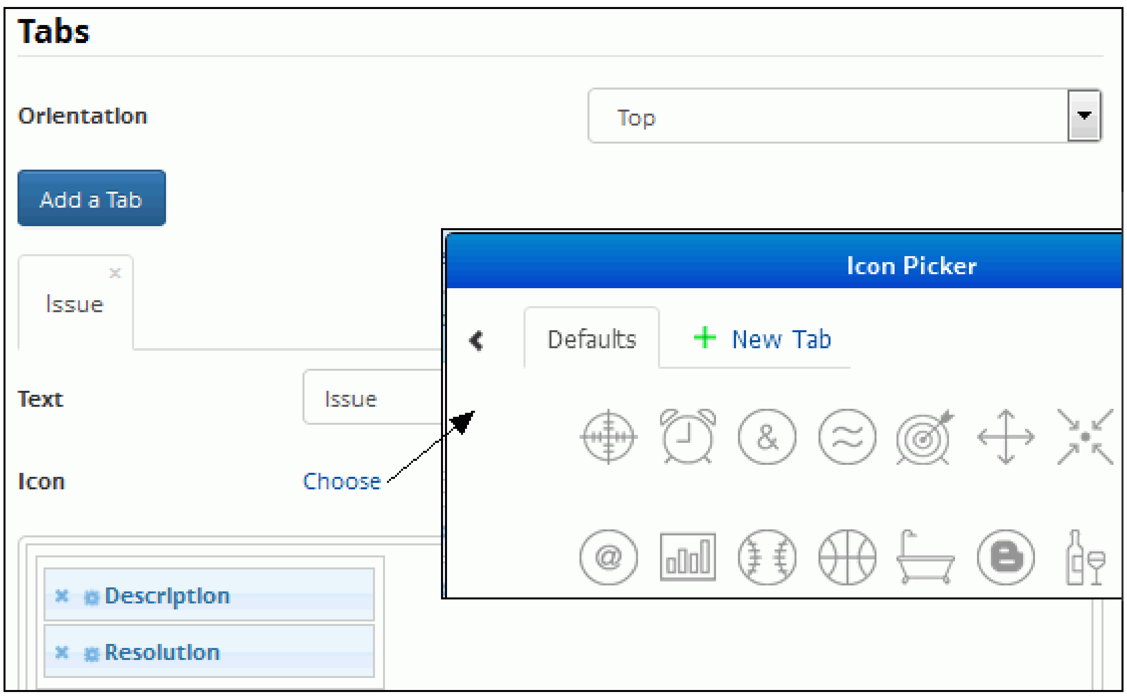


- Drag the Custom Fields field under the List Items section and then select Configure Field to display the Configure Field dialog and select the types of custom fields to include: global custom fields, additionally defined custom fields, or both. See "Configuring Fields" on page 51.

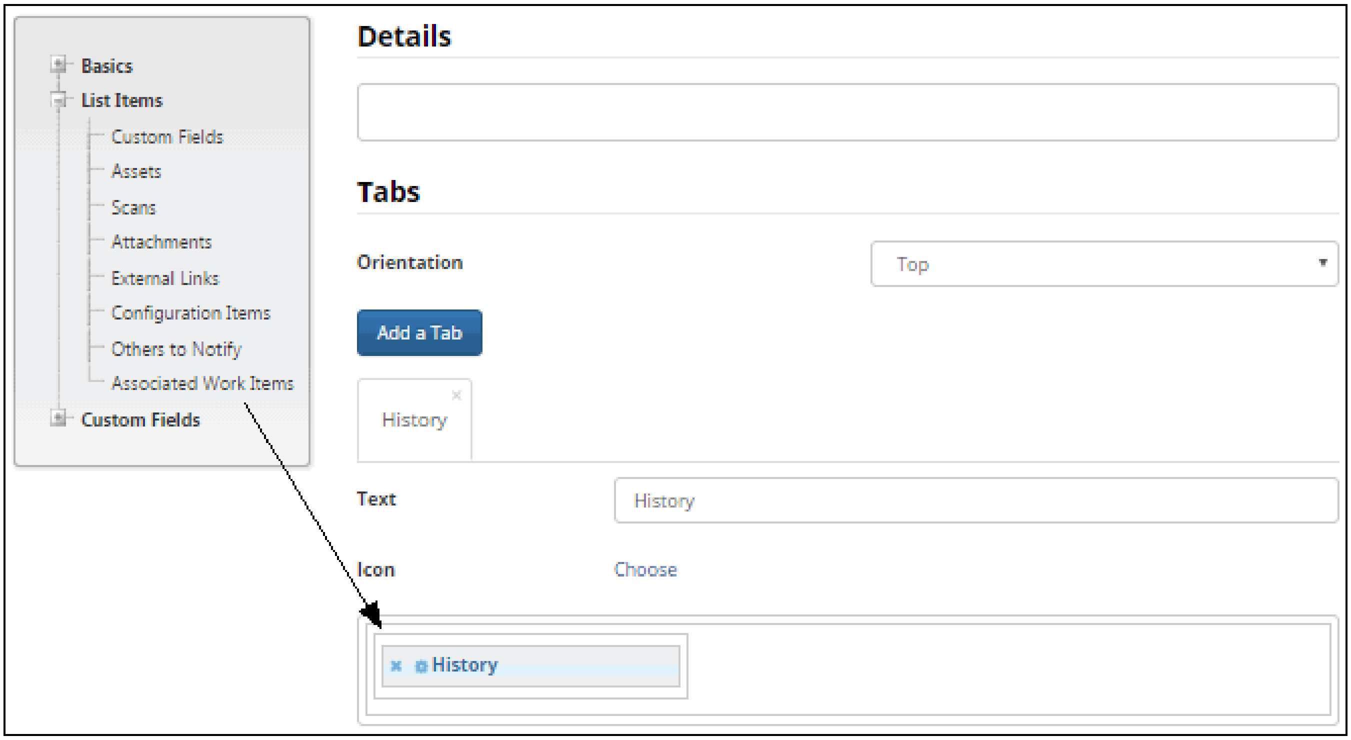


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

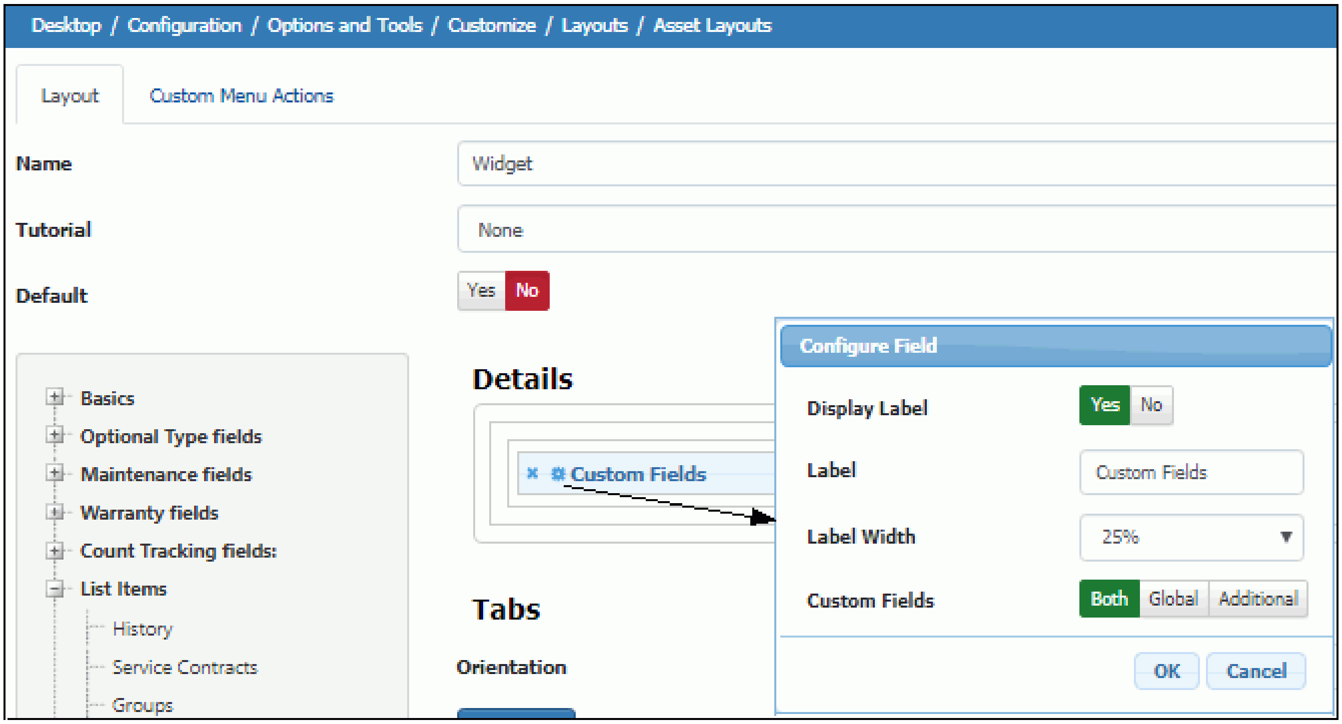


Note: The Description field is optional on mySupport incident submit layouts. The following text will be included in the Description field after submission: "Description field not included in <layout name> mySupport incident submit layout." If the layout is associated with a template, the description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

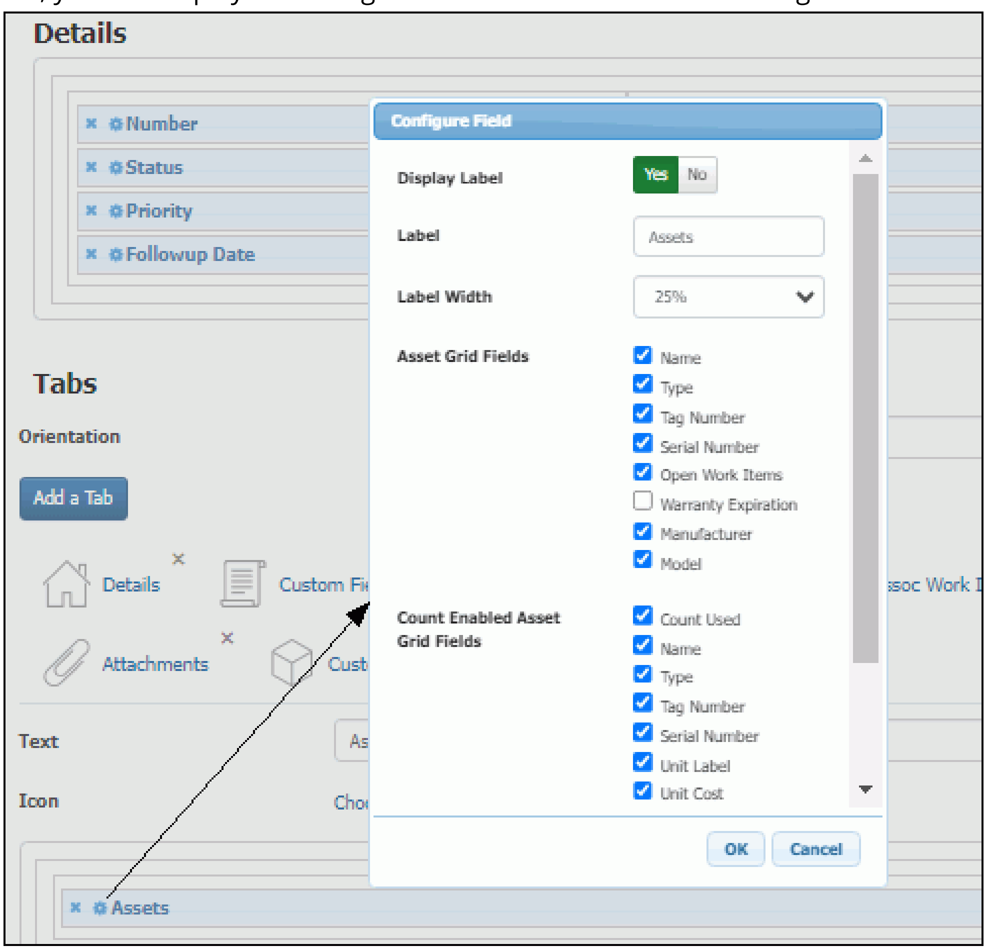
Configuring Fields

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.

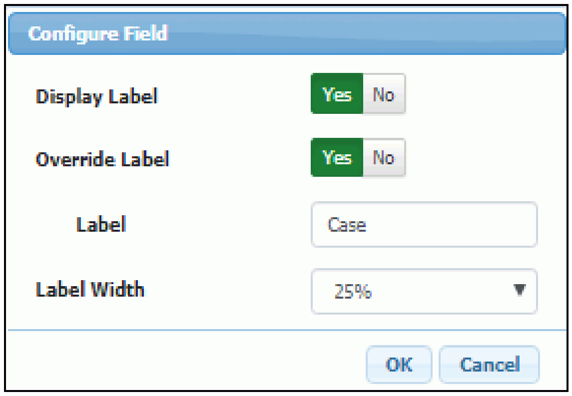


For work item layouts, you can display an asset grid for the Asset field via the Configure Field icon:

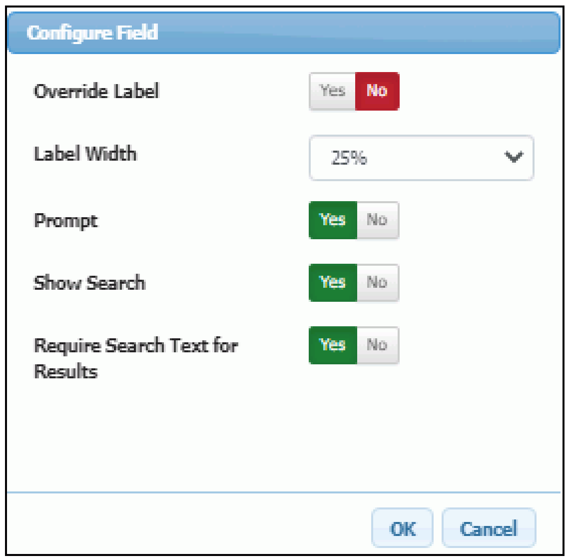


mySupport Layouts

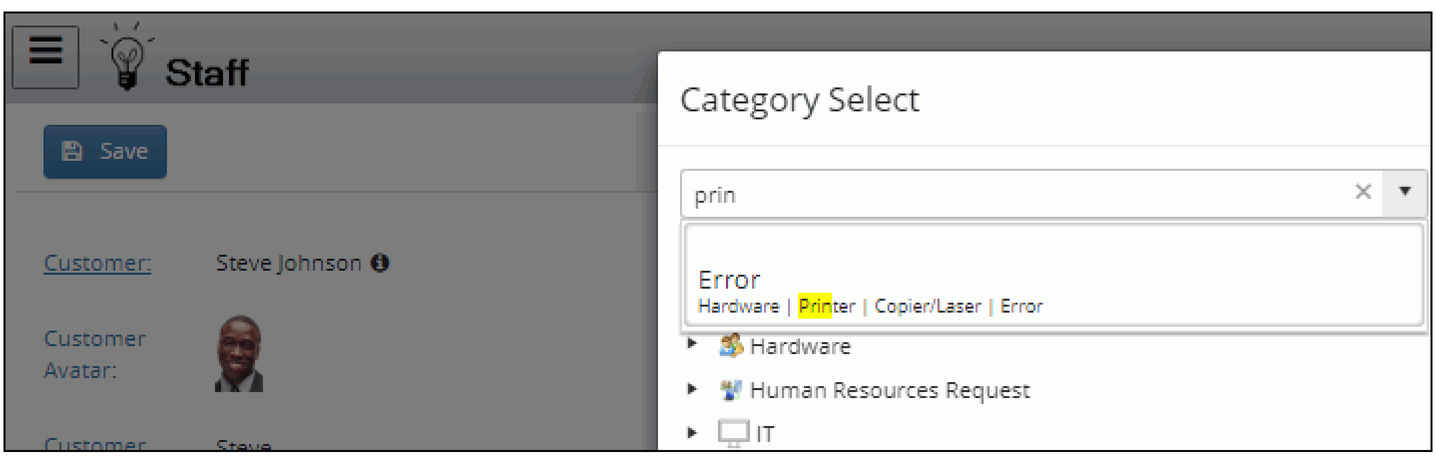
- Select Yes in the **Override Label** field to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



- If configuring the **Category** field:

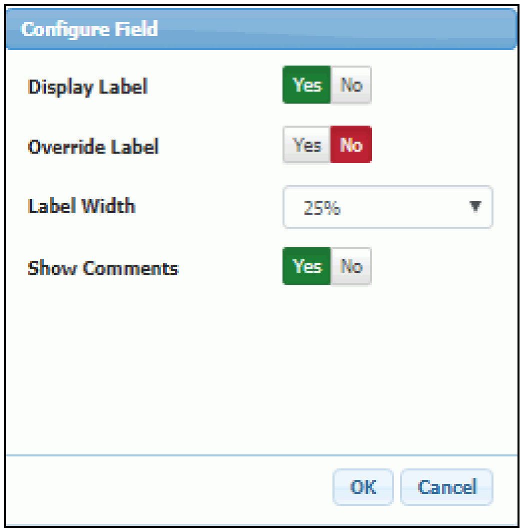


  - Select Yes in the **Prompt** field to initially display the Category Select dialog when the Incident or Change Submit screen appears.
  - Select Yes in the **Show Search** field to include a search field in the Category Select dialog.



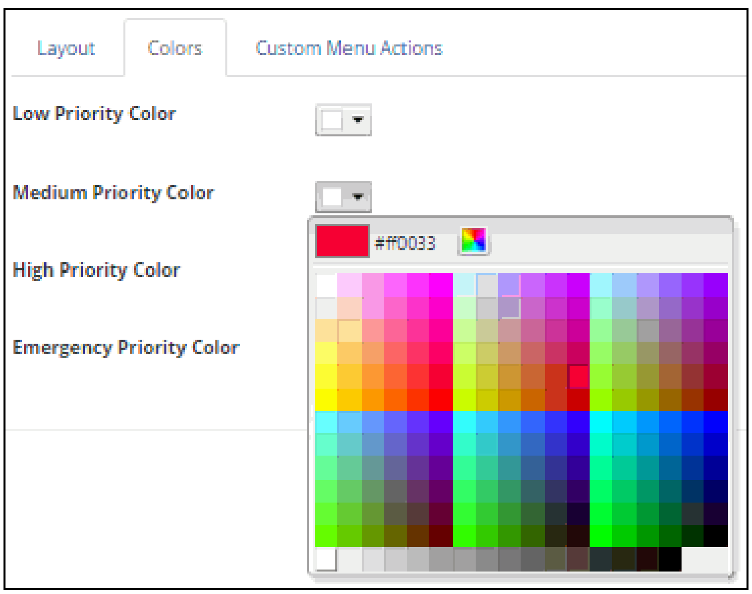
  - Select Yes in the **Require Search Text for Results** field to prevent display of the results until the user has started typing.

- 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).



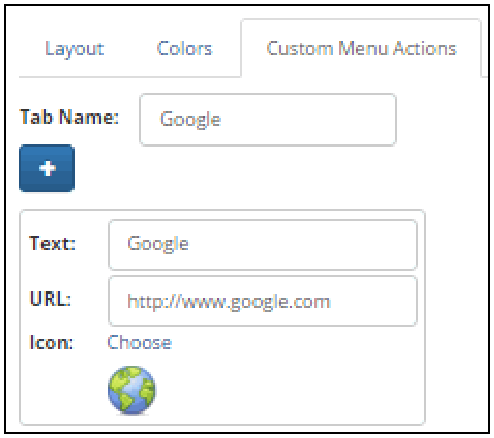
Configuring Priority-Based Background Colors

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.

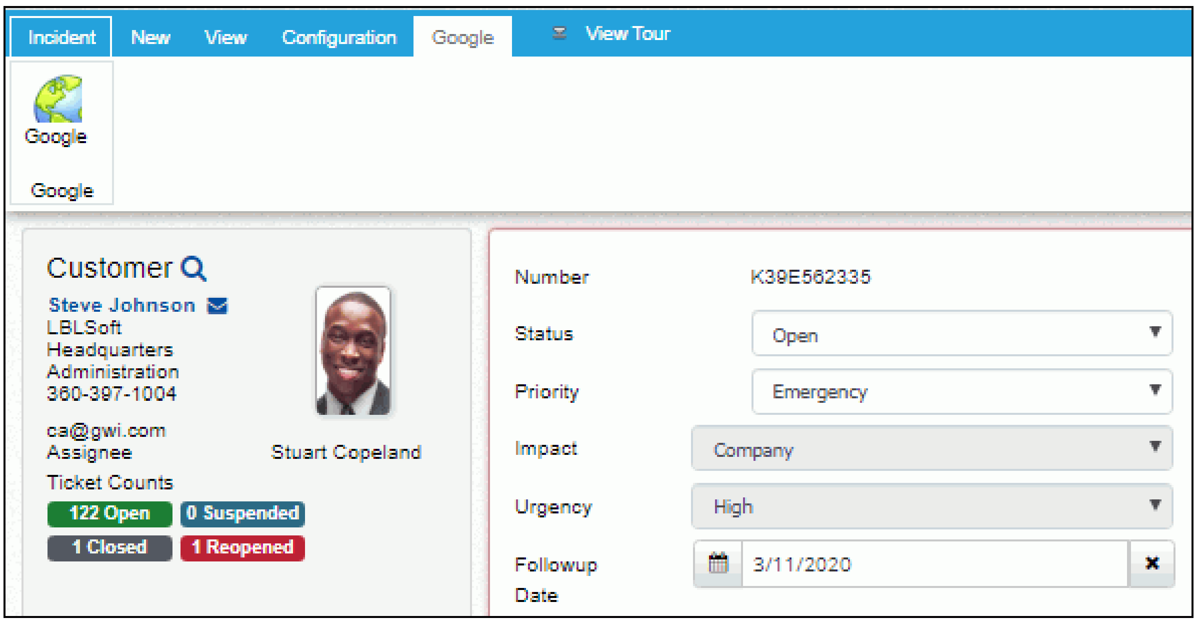


Configuring Custom Menu Actions

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.

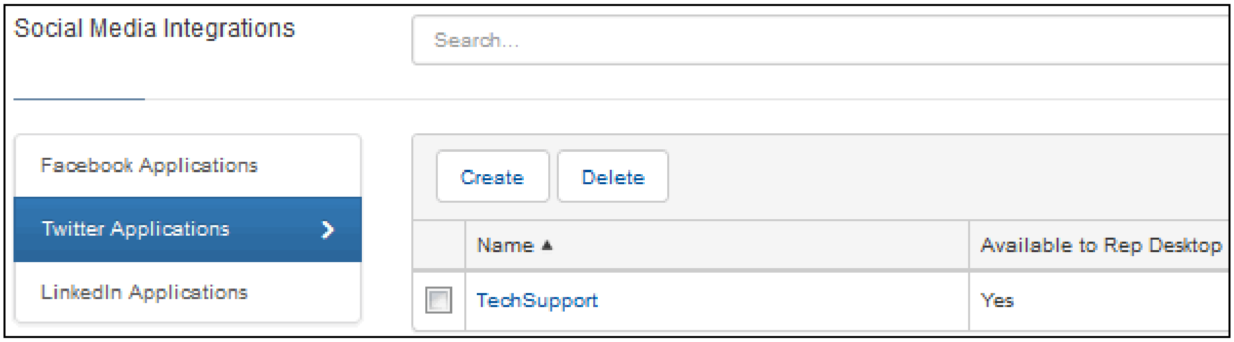


Example:



Configuring Social Media Integration

Use the Options and Tools | Integrate | Social Media Integration screen to configure settings that work in conjunction with Twitter notifications as well as the LinkedIn and Facebook linked account functionality on the mySupport portal.



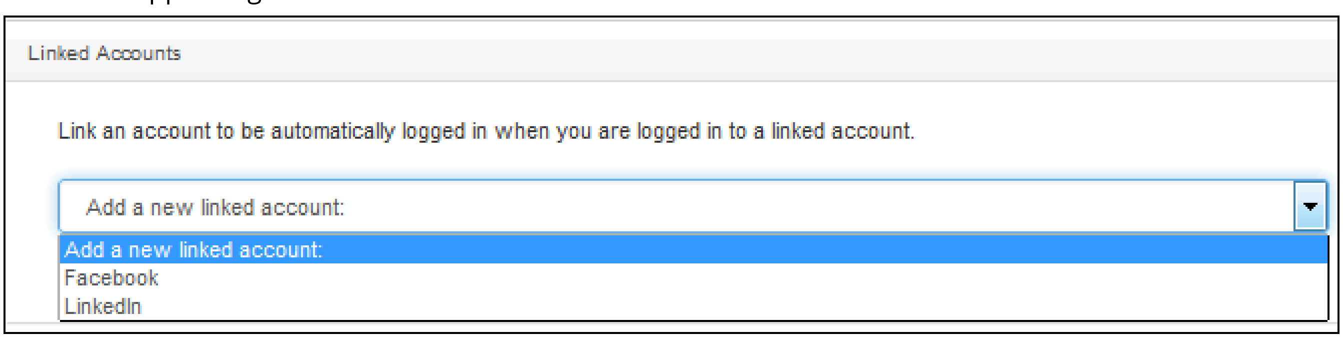
- **Facebook Applications** - Customers can link to and authenticate to the mySupport portal via a Facebook account; use the Facebook Applications tab to configure an application for this functionality. See "Facebook Applications" on page 56.
- **Twitter Applications** - A Twitter account and application must be configured in iSupport in order to use the Twitter and Twitter Monitor Desktop components, publish headlines and problems to Twitter, and send customer notifications regarding work item updates via Twitter. See "Twitter Applications" on page 58.
- **Linked In Applications** - Customers can link to and authenticate to the mySupport portal via a LinkedIn account; use the LinkedIn Applications tab to configure an application for this functionality. See "LinkedIn Applications" on page 60.

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.

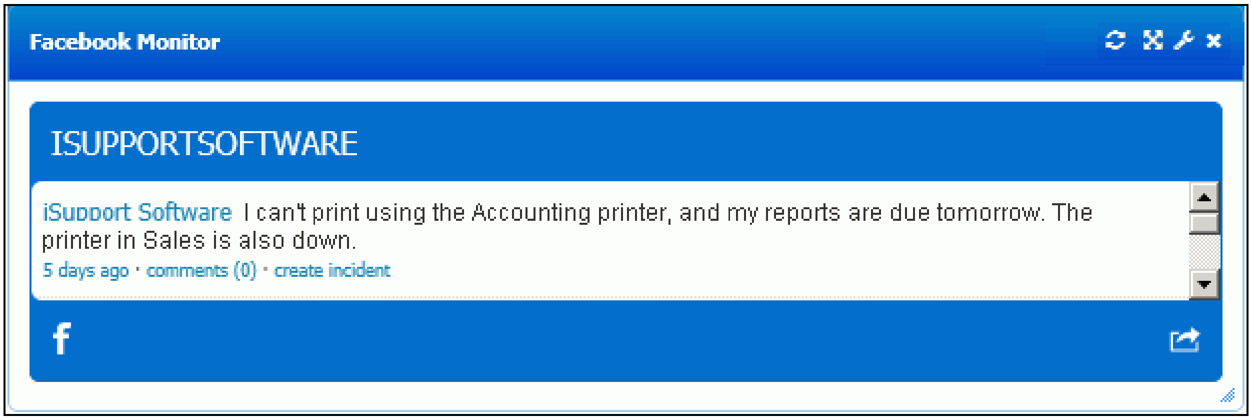
Facebook Applications

Configure a Facebook application to enable:

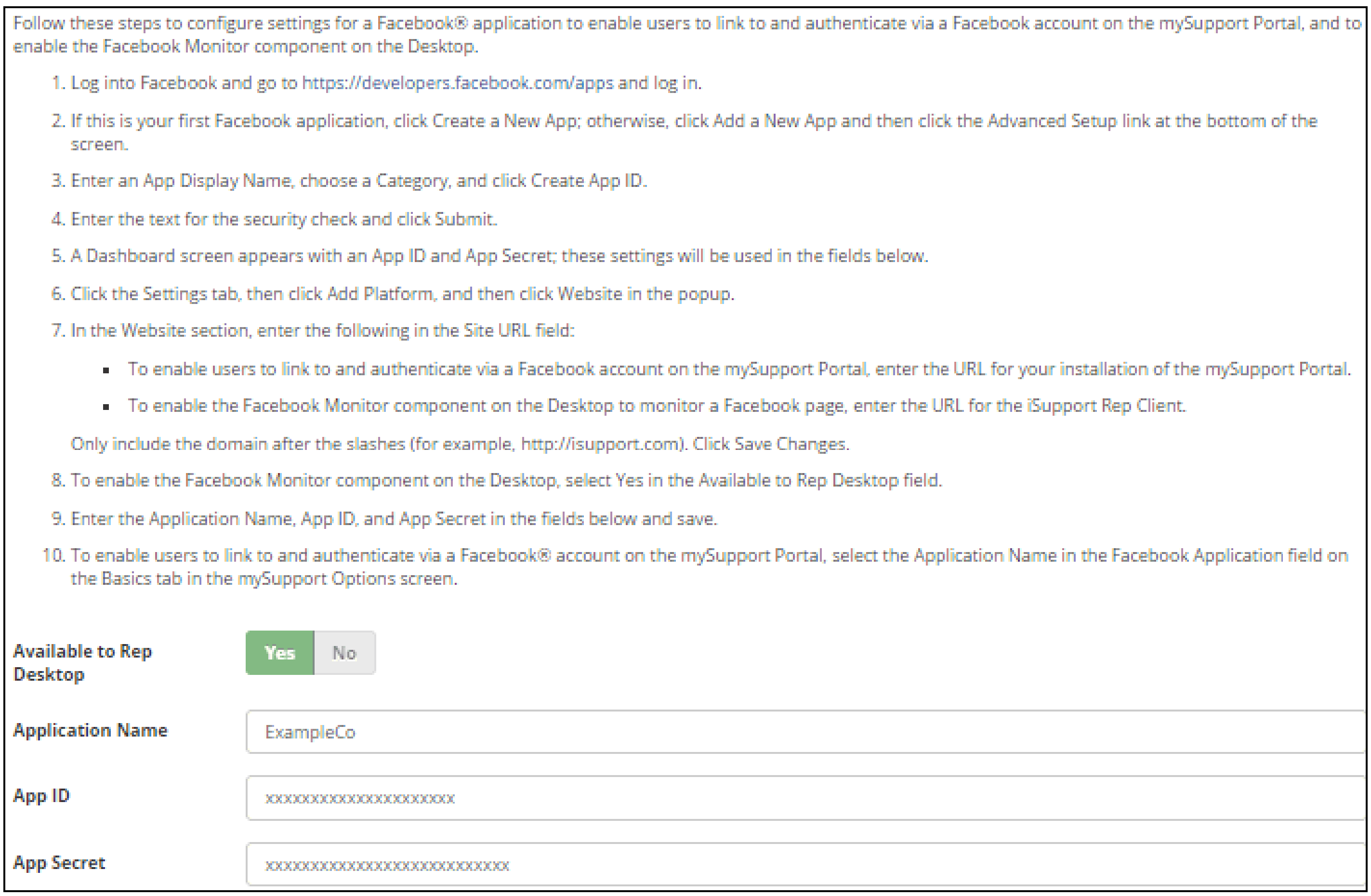
- Customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via Facebook; if the customer is logged into Facebook, the customer will not need to enter an iSupport login.



- The Facebook Monitor component on the Desktop to monitor a Facebook page and display posts and comments from it. It includes an option to create an incident from a listed post or reply. If the customer's Facebook email address exists for a customer in Customer Profiles, the matching Customer Profile record will be used; otherwise, a new Customer Profile record will be created with the customer's email address in the format of <*Facebook username*>@facebook.com. A reply will be posted to Facebook with the incident number and a link to the incident; if the Facebook application doesn't have permission to do this, an email will be sent to the customer's Facebook email account.



Follow the steps on the Facebook Applications tab in the Options and Tools | Integrate | Social Media Integration screen to configure a Facebook application.



Follow these steps to configure settings for a Facebook® application to enable users to link to and authenticate via a Facebook account on the mySupport Portal, and to enable the Facebook Monitor component on the Desktop.

1. Log into Facebook and go to https://developers.facebook.com/apps and log in.
2. If this is your first Facebook application, click Create a New App; otherwise, click Add a New App and then click the Advanced Setup link at the bottom of the screen.
3. Enter an App Display Name, choose a Category, and click Create App ID.
4. Enter the text for the security check and click Submit.
5. A Dashboard screen appears with an App ID and App Secret; these settings will be used in the fields below.
6. Click the Settings tab, then click Add Platform, and then click Website in the popup.
7. In the Website section, enter the following in the Site URL field:
   - To enable users to link to and authenticate via a Facebook account on the mySupport Portal, enter the URL for your installation of the mySupport Portal.
   - To enable the Facebook Monitor component on the Desktop to monitor a Facebook page, enter the URL for the iSupport Rep Client.

   Only include the domain after the slashes (for example, http://isupport.com). Click Save Changes.
8. To enable the Facebook Monitor component on the Desktop, select Yes in the Available to Rep Desktop field.
9. Enter the Application Name, App ID, and App Secret in the fields below and save.
10. To enable users to link to and authenticate via a Facebook® account on the mySupport Portal, select the Application Name in the Facebook Application field on the Basics tab in the mySupport Options screen.

Available to Rep Desktop	Yes No
Application Name	ExampleCo
App ID	xxxxxxxxxxxxxxxxxxxxx
App Secret	xxxxxxxxxxxxxxxxxxxxxxxxxxx

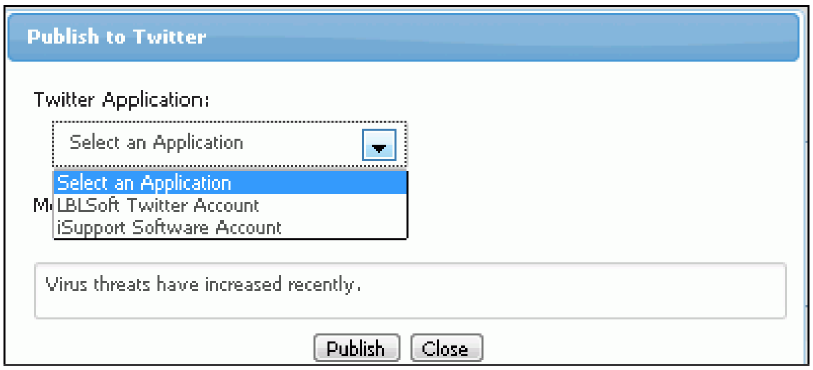
After completing the Application Name, App ID, and App Secret fields:

- To enable the Facebook Monitor component on the Desktop to monitor a Facebook page, select Yes in the Available to Rep Desktop field.
- To enable "Facebook" to display in the Add a New Linked Account dropdown in the Linked Accounts section in the mySupport Account Settings dialog, select the application name in the Core Settings | mySupport | mySupport Portals | Options screen.

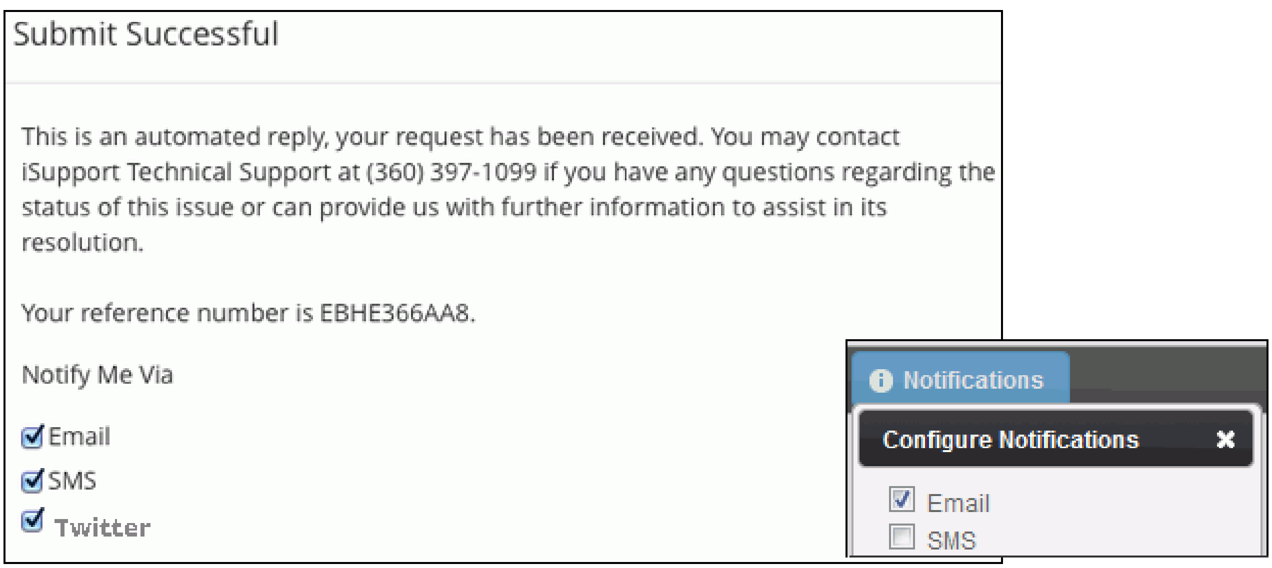
Twitter Applications

A Twitter account and application must be configured in iSupport in order to use the following features. To get started with creating a Twitter application, see "Configuring a Twitter Application" on page 59.

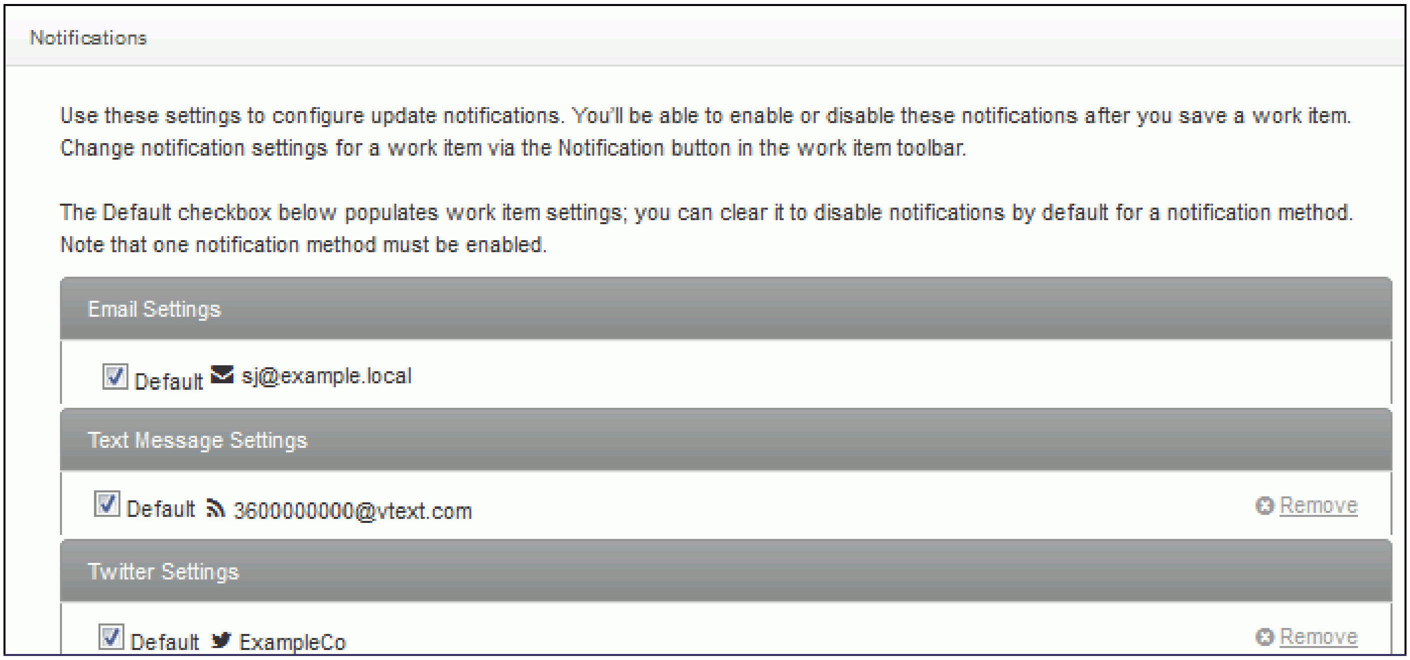
- Use the Twitter component display a Twitter feed for a specified Twitter username.
- Use the Twitter Monitor component to search Twitter feeds and display tweets that include a specified search term. You can use the Reply link to reply to tweets directly from iSupport, or use the Create Incident link to create an incident and send a reply to the Twitter user (via a Twitter direct message) with their incident number included. The tweet will be included in the Description field in the incident, and if the Twitter username exists for a customer in Customer Profiles, the matching Customer Profile record will be used. If the Twitter username does not exist for a customer, a new Customer Profile record will be created in the format of <*Twitter username*>@twitter.com.
- Support representatives can publish headlines and problems via Twitter. The Twitter option will appear in the Headline and Problem screens if the support representative has the Publish to Twitter permission; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines) or the short description (for problems). If multiple Twitter applications have been created, the user can select the account to which the headline or problem should be published.



- Customers can use the Notifications section in the mySupport Account Settings dialog to enable a notification to be sent via Twitter direct message whenever when a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests). As shown in the dialogs below, customers can enable or disable notifications for a work item after saving, and change notification settings for an existing work item via the Notification button in the work item toolbar.

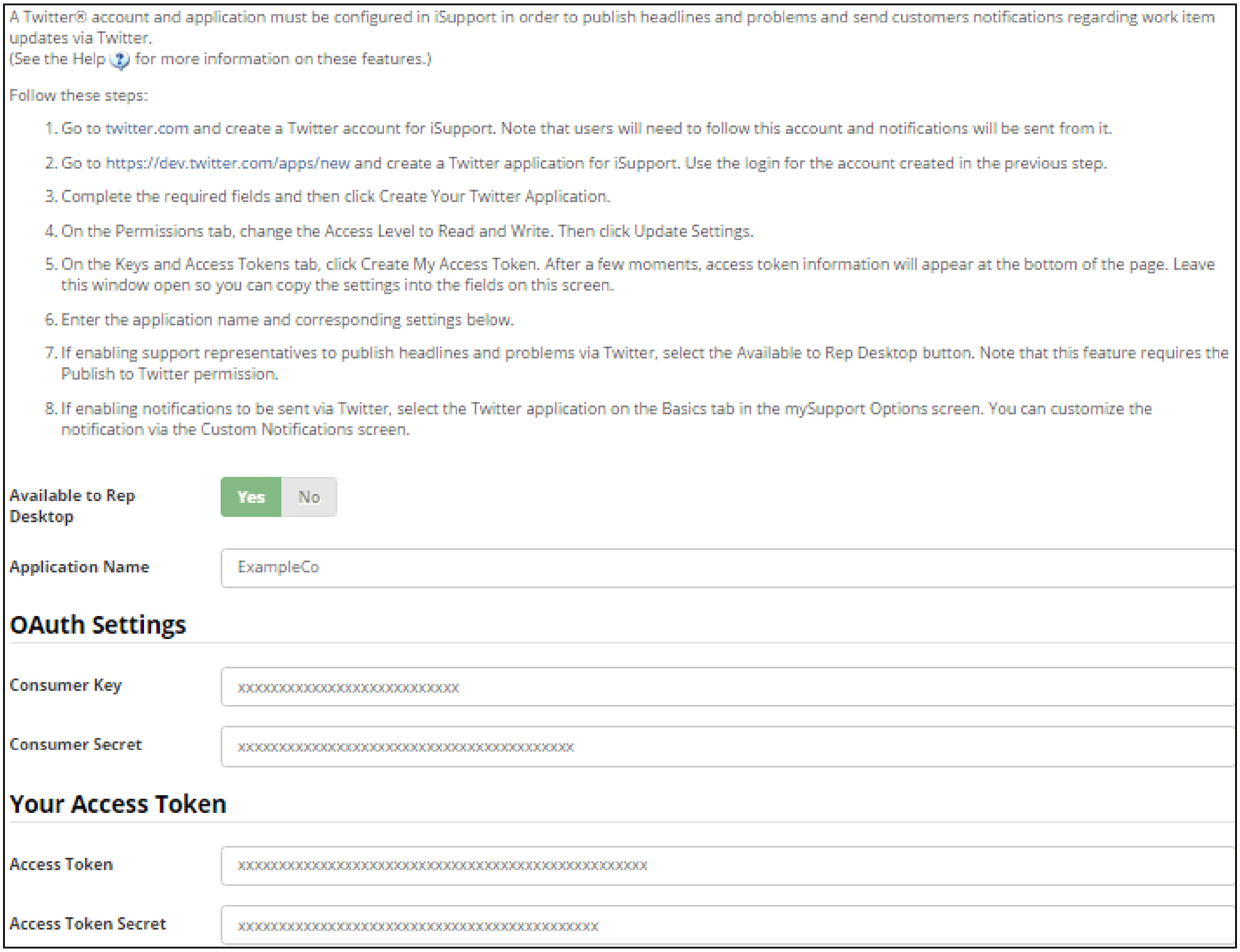


Customers configure the Twitter account to which the notification should be sent in the Notifications settings. The user needs to be following the account associated with the Twitter application specified in configuration; this account will be listed in the dialog prompting for the activation code.



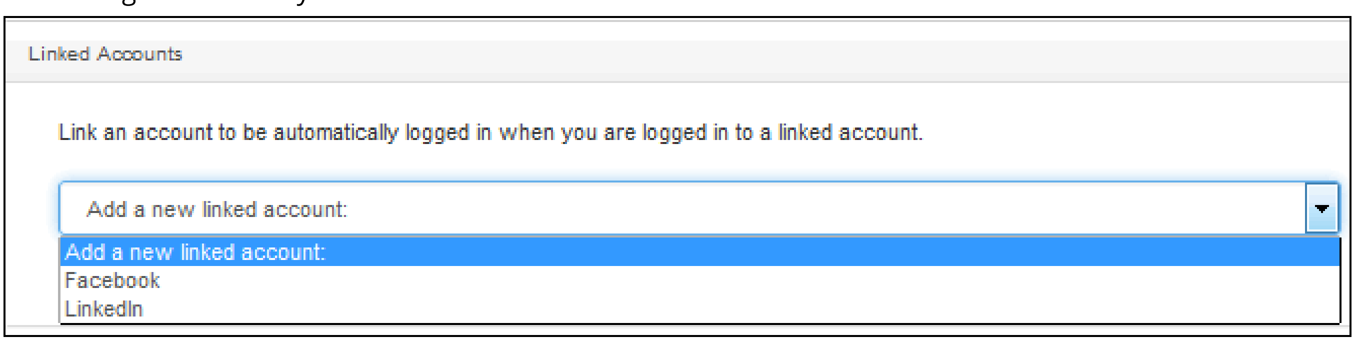
Configuring a Twitter Application

Follow the steps on the Twitter Applications tab in the Options and Tools | Integrate | Social Media Integration screen to create a Twitter account and application; use the Available to Rep Desktop button to enable an account to be published to Twitter. To enable the application to be used for update notifications sent to customers via the mySupport portal, select the application name in the Core Settings | mySupport | mySupport Portals | Options screen.

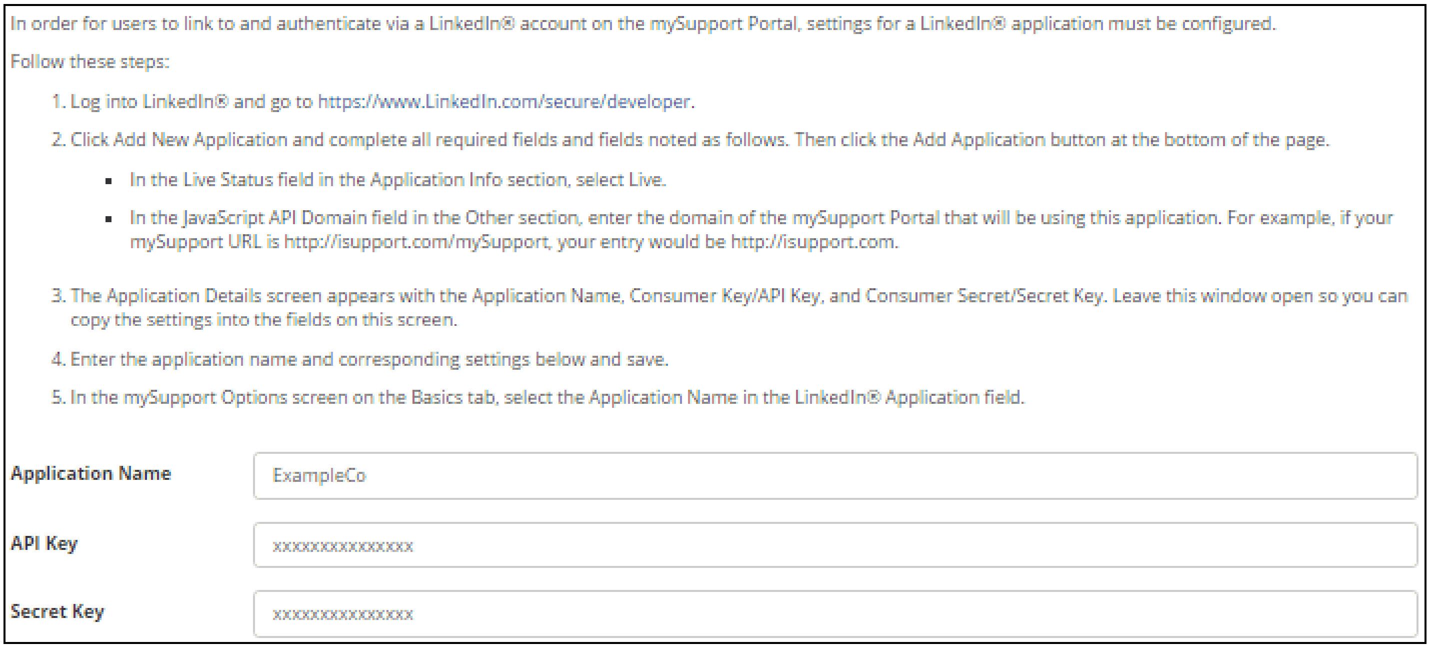


LinkedIn Applications

Customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via LinkedIn.



Follow the steps in the screen to configure a LinkedIn application, and then select the application name in the Core Settings | mySupport | mySupport Portals | Options screen to enable "LinkedIn" to display in the Add a New Linked Account dropdown in the Linked Accounts section in the mySupport Account Settings dialog.



In order for users to link to and authenticate via a LinkedIn® account on the mySupport Portal, settings for a LinkedIn® application must be configured.

Follow these steps:

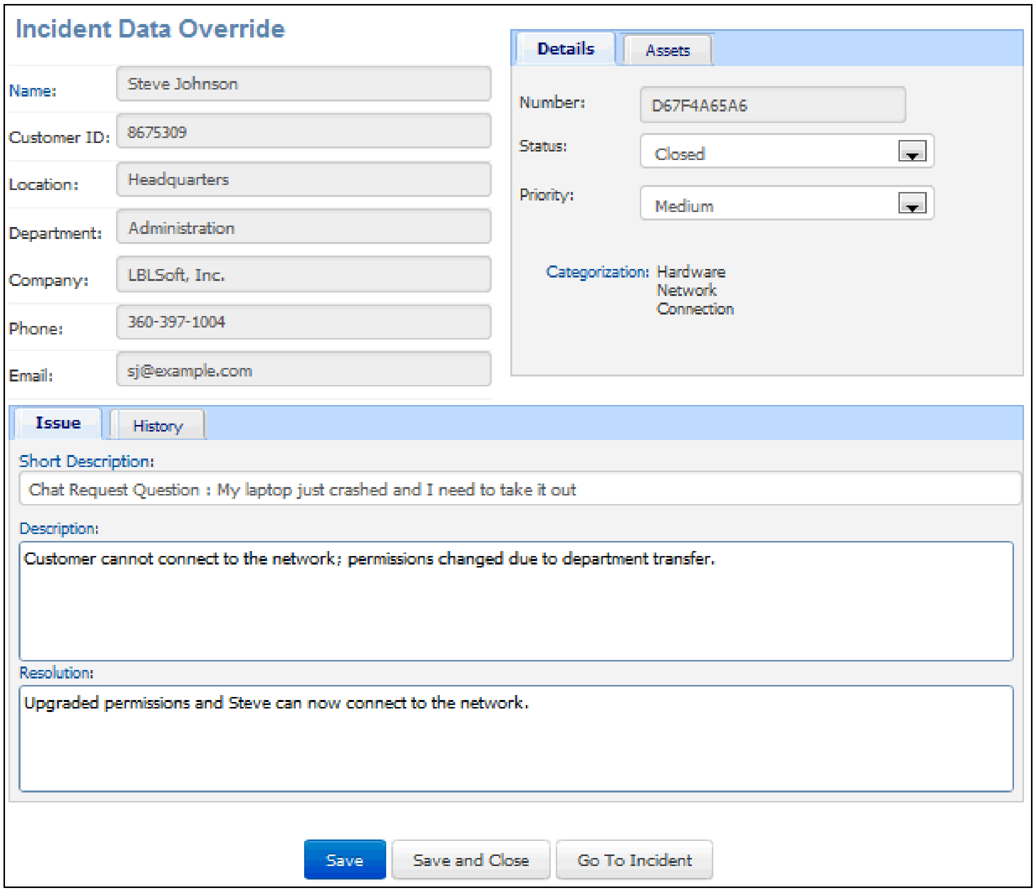
1. Log into LinkedIn® and go to https://www.LinkedIn.com/secure/developer.
2. Click Add New Application and complete all required fields and fields noted as follows. Then click the Add Application button at the bottom of the page.
   - In the Live Status field in the Application Info section, select Live.
   - In the JavaScript API Domain field in the Other section, enter the domain of the mySupport Portal that will be using this application. For example, if your mySupport URL is http://isupport.com/mySupport, your entry would be http://isupport.com.
3. The Application Details screen appears with the Application Name, Consumer Key/API Key, and Consumer Secret/Secret Key. Leave this window open so you can copy the settings into the fields on this screen.
4. Enter the application name and corresponding settings below and save.
5. In the mySupport Options screen on the Basics tab, select the Application Name in the LinkedIn® Application field.

Application Name	ExampleCo
API Key	xxxxxxxxxxxxxxx
Secret Key	xxxxxxxxxxxxxxx

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

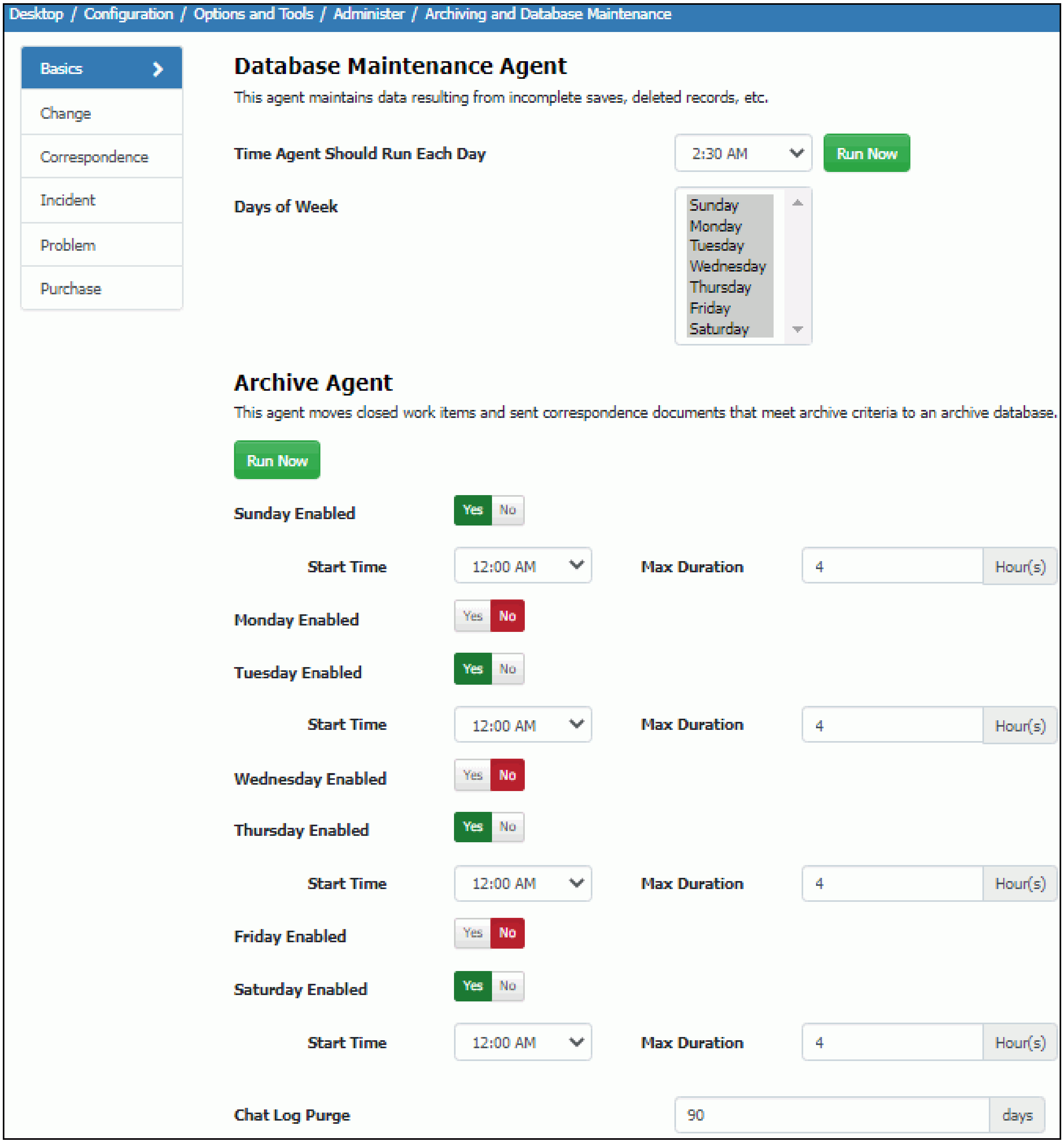
Use the Options and Tools | Administer | Data Override feature to overwrite fields on any saved incident, problem, or change. When a change is made using this feature, it will be logged in the Audit History field and notifications will be suppressed. If an approval cycle is in effect and the status is 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.



Archiving and Database Maintenance

Use the Options and Tools | Administer | Archiving and Database Maintenance screen to schedule agents that maintain iSupport databases. iSupport's Archive feature moves closed work items with a specified Closed status that are not marked for deletion to archive databases, and purges work items from archive databases. In order for an item to be archived, a specified number of days must have elapsed past the close date. Note that archived items cannot be edited, and support representative roles/permissions can apply to archiving activities.



Scheduling the Database Maintenance Agent

Schedule the Database Maintenance agent to maintain data resulting from incomplete saves, deleted records, etc. Select the days of the week and time at which the Database Maintenance agent should run each day.

Setting Time Frame Options for the Archive Agent

Use the settings in the Archive Agent section to set a start time and maximum run duration for each day of the week. Use the Run Now button to initiate the agent immediately; you will be prompted for a maximum runtime. In the Max Duration field, enter the amount of time (in hours) at which to terminate the archive agent if it is still running. This section is useful if you need to run the Archive agent for longer periods of time on weekends, particular days of the week, or times of lighter workloads.

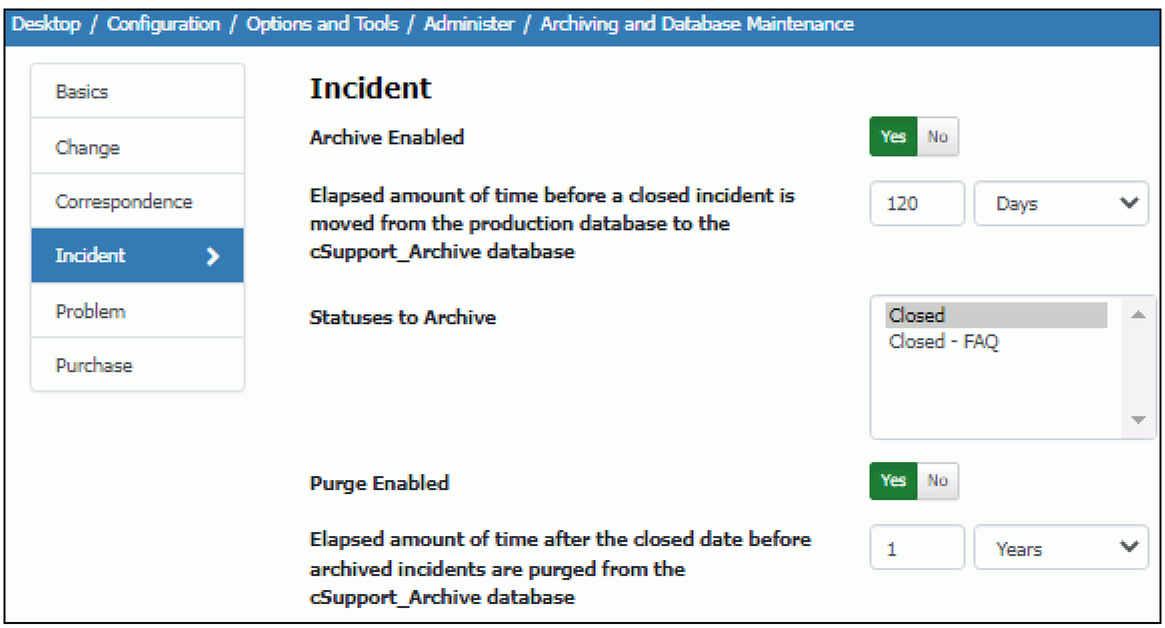
The Archive agent will do the following:

- Eligible incidents and sent correspondence not associated with an open work item will be moved to the cSupport_Archive database. If an incident or change is part of a hierarchy template, the topmost parent in the hierarchy must meet the archive criteria before any closed work items are archived.
- Eligible changes will be moved to the cSupport_Archive_Change database.
- Eligible problems will be moved to the cSupport_Archive_Problem database.
- Eligible purchase orders will be moved to the cSupport_Archive_Purchase database.

When a customer request a chat, request details are logged; this log is available through the mySupport Chat Request view source in the View Designer.You can use the **Chat Log Purge** field to enter the number of days after which entries in the chat log will be deleted automatically by the Database Maintenance agent. Note that the Enable Features tab in the Core Settings | Feature Basics screen includes this field as well.

Setting Archive Options for Work Item Types

For each work item type, use the following fields to enable archiving, specify the status and elapsed amount of time before of items to archive, eligible for archiving or purging (which permanently deletes items from the applicable archive database after the specified number of days/years past the archive date).



Archive Enabled - Select Yes to enable the Archive Agent to move eligible items from the production database to the applicable archive database. Items with one of the specified Closed statuses and a closed date that is past the specified number of days/years will be selected.

Elapsed amount of time before a closed <*work item type*> or sent correspondence (not associated with an open incident) is moved from the production database to the cSupport_<*work item type*>_Archive database - Enter the number of days to pass after the close date until an item with one of the specified Closed statuses is selected to be moved.

Statuses to Archive - Select one or more of the defined Closed statuses that will determine items eligible for archiving.

Purge Enabled/Elapsed amount of time before archived <*work item type*> are purged from the <*applicable archive database*> - Select Yes to permanently delete items from the applicable archive database after the specified number of days/years past the archive date. In the **Elapsed amount of time before archived <*work item type*> are purged from the <*applicable archive database*>** field, enter the number of days/years past the archive date in which to remove items from the applicable archive database.

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

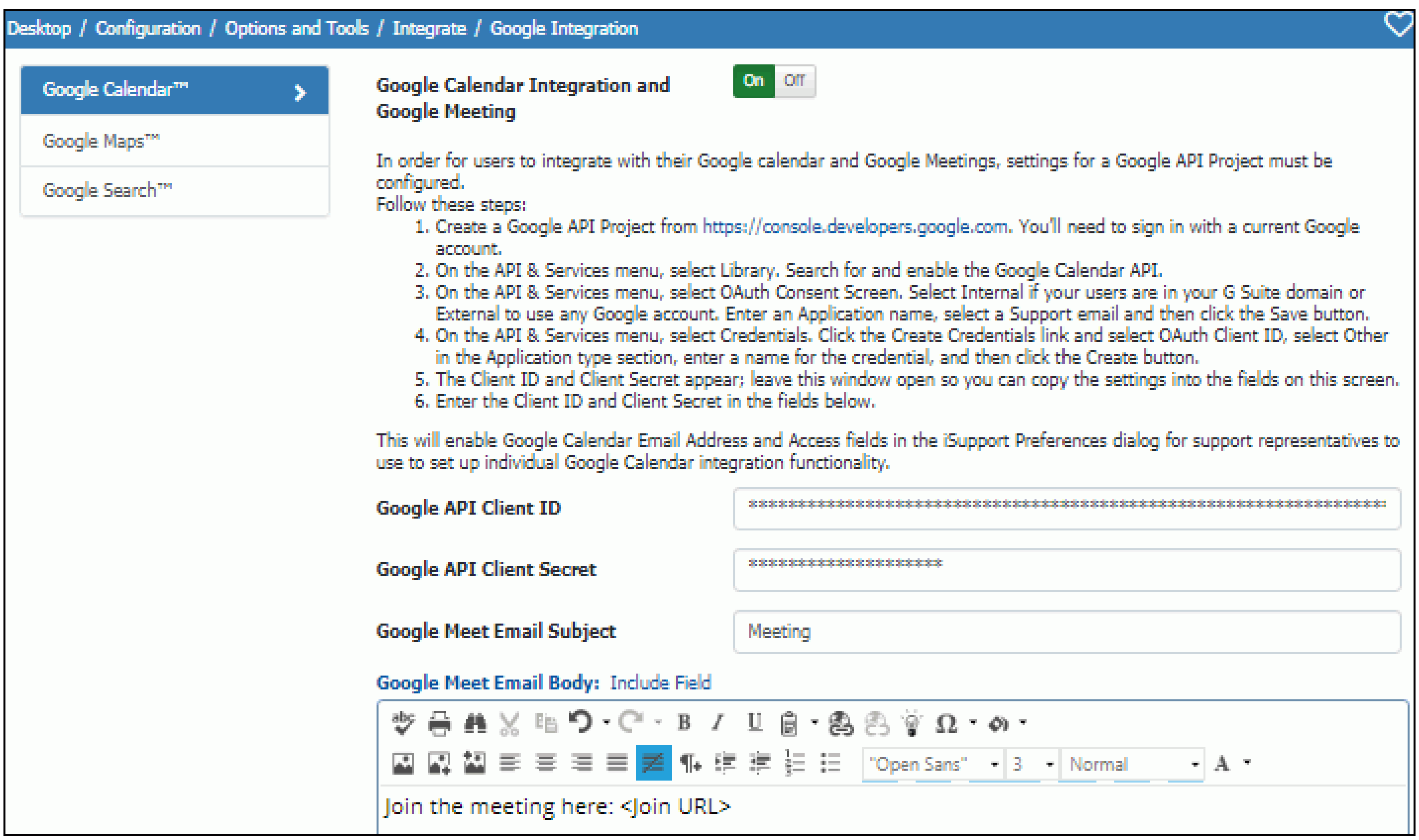
Set up Google Calendar integration in the Options and Tools | Integration | Google Integration screen to enable users to access their Google Calendar for the Calendar option on the Desktop and mySupport portals, a New Meeting option in iSupport entry screens for scheduling a Google Calendar meeting,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

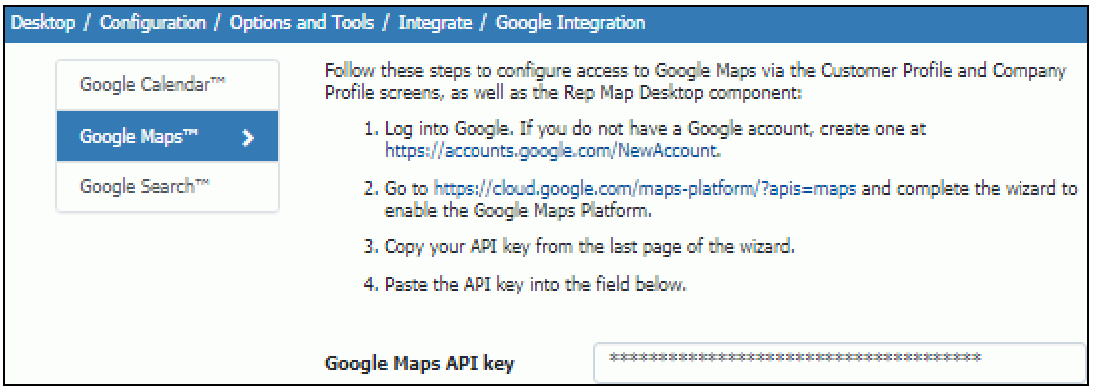


Note: Support representatives will need to use the Google Calendar Email Address and Google Calendar Access fields on the Details screen in the Preferences dialog to enable access to their calendar(s) and set the work day hours during which they are available to be scheduled via iSupport. (The dates/times 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.

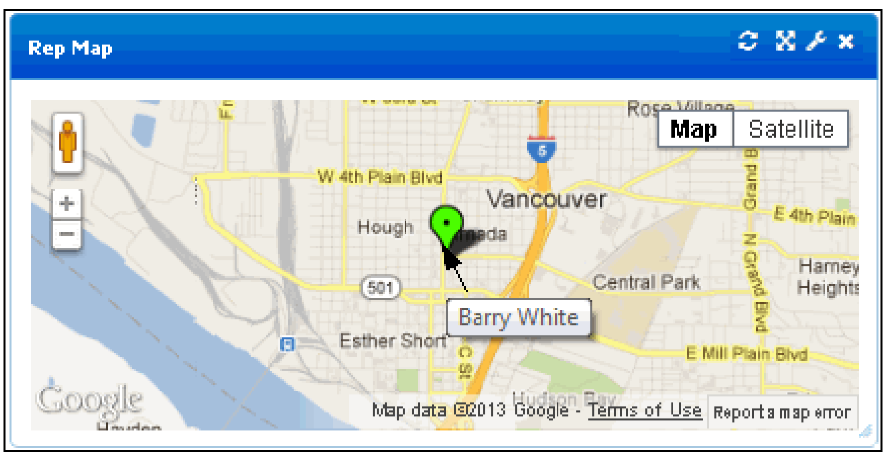
Google Meet meetings can be included in work item screens; add the Google Meetings field to a work item screen layout via the Layouts configuration screen.

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.

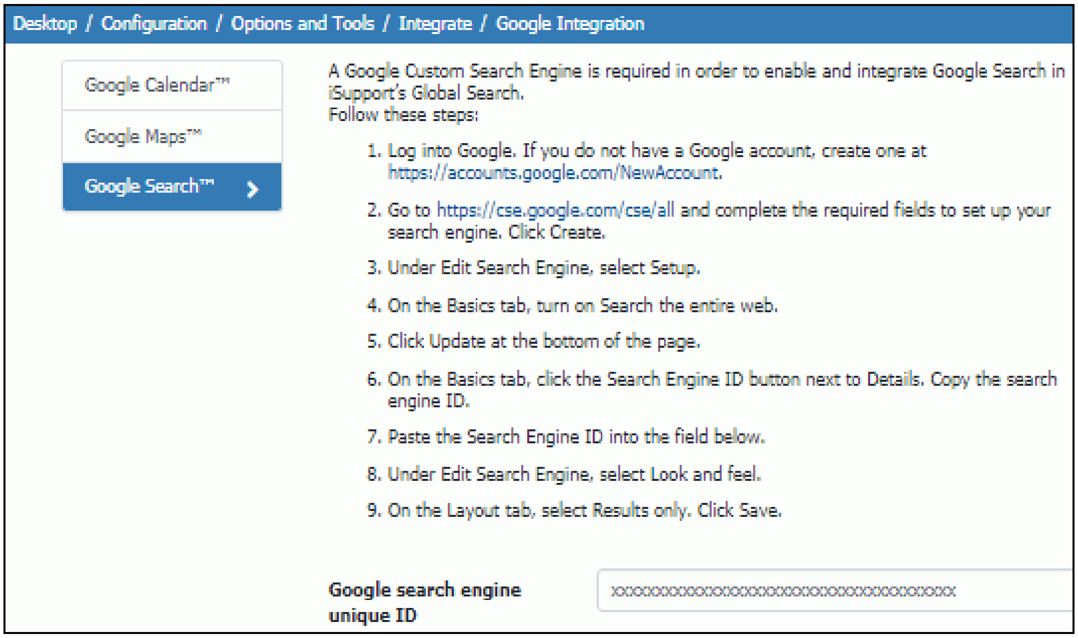


Maps will appear as shown in the example below.

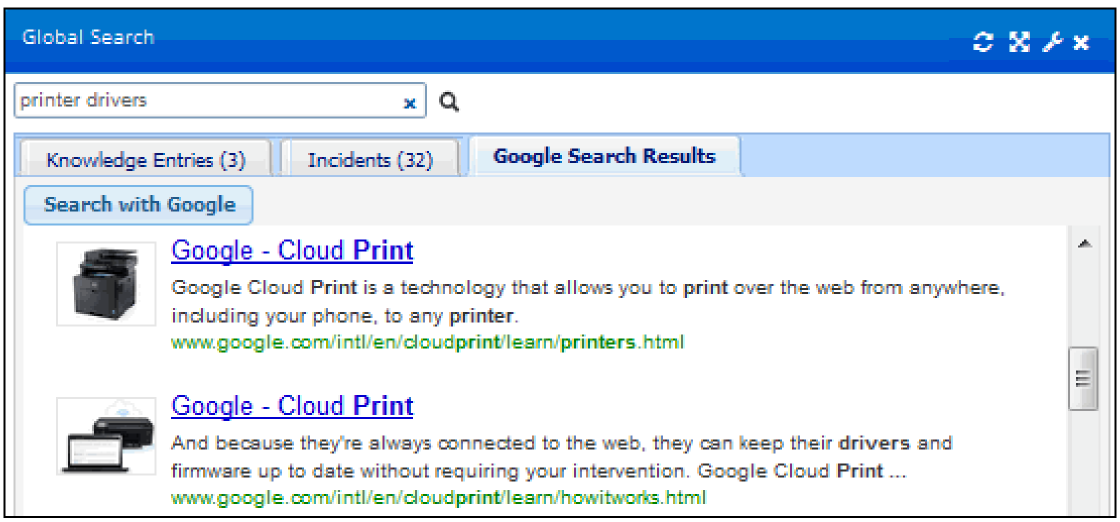


Google Search

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.



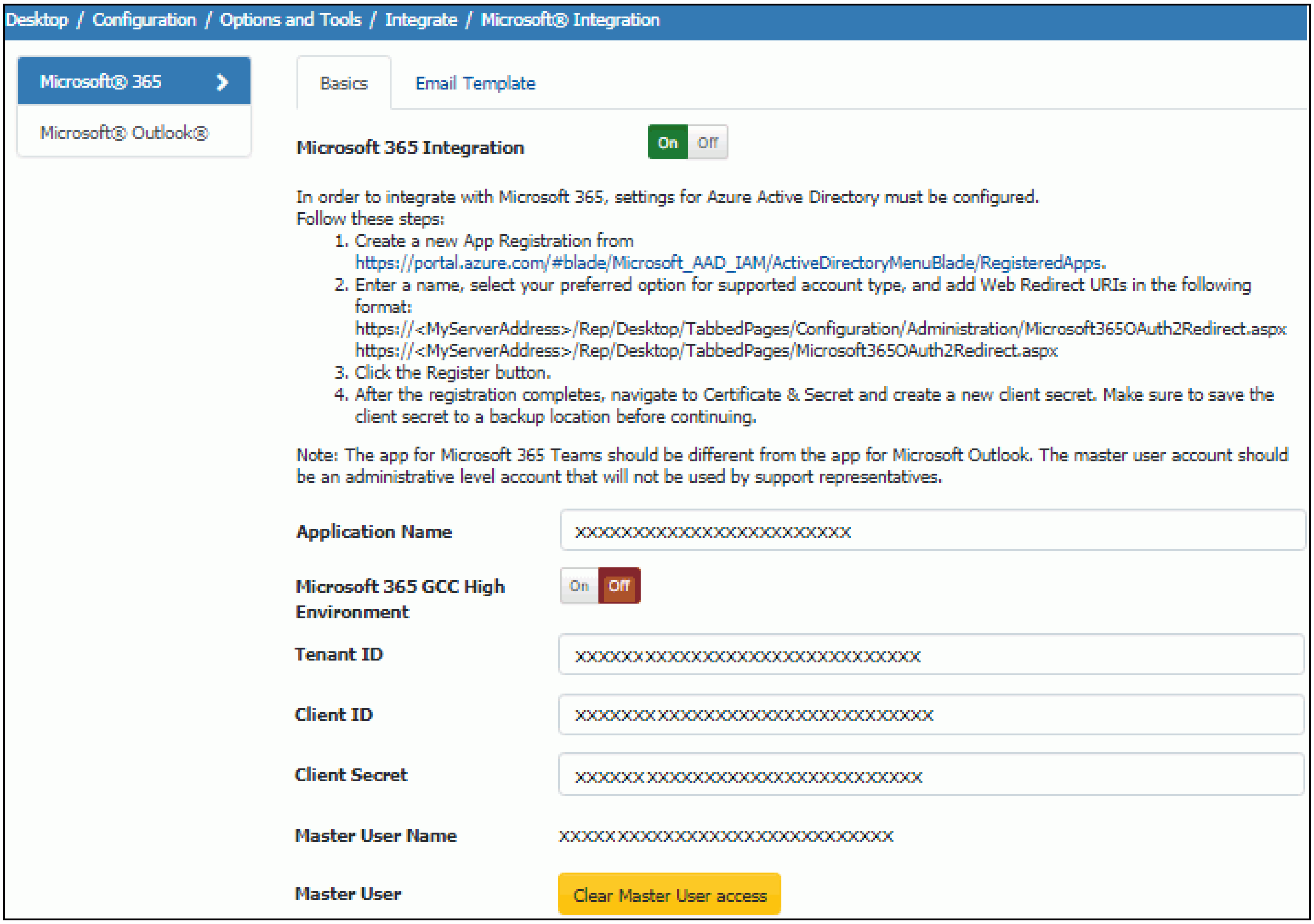
The Google Search tab will appear in the Global Search component as shown in this example.



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

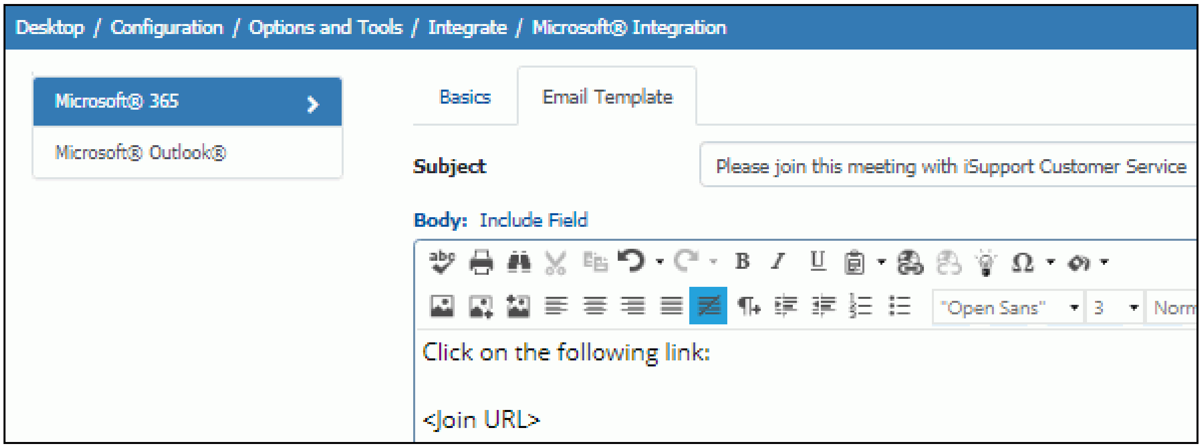
Microsoft Teams tasks, and enabling Microsoft Teams Meeting and Planner Task option to appear in work item screens for creating meetings and tasks with prefilled references to the iSupport work item number.



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.

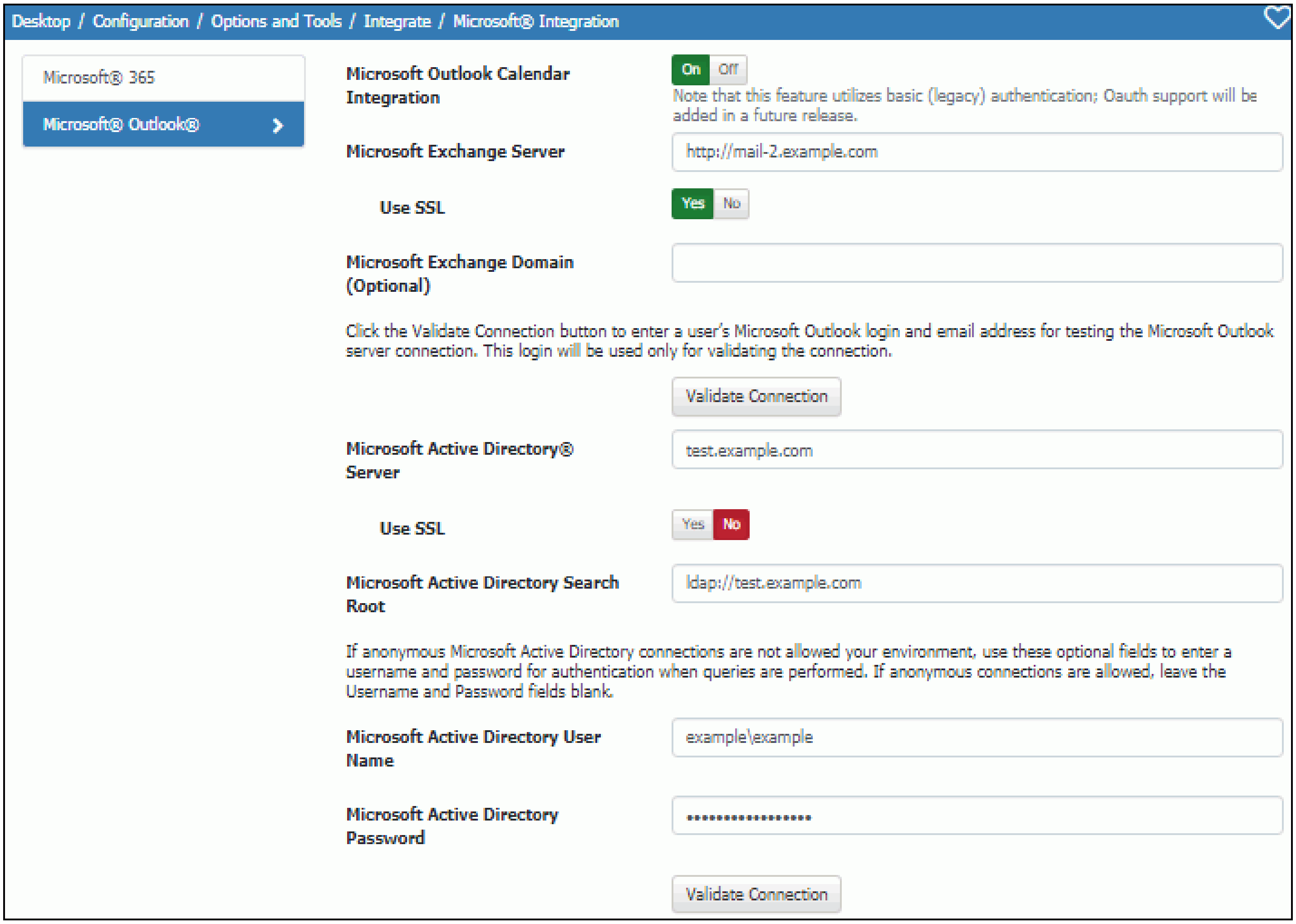
Microsoft Outlook Calendar Integration

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://

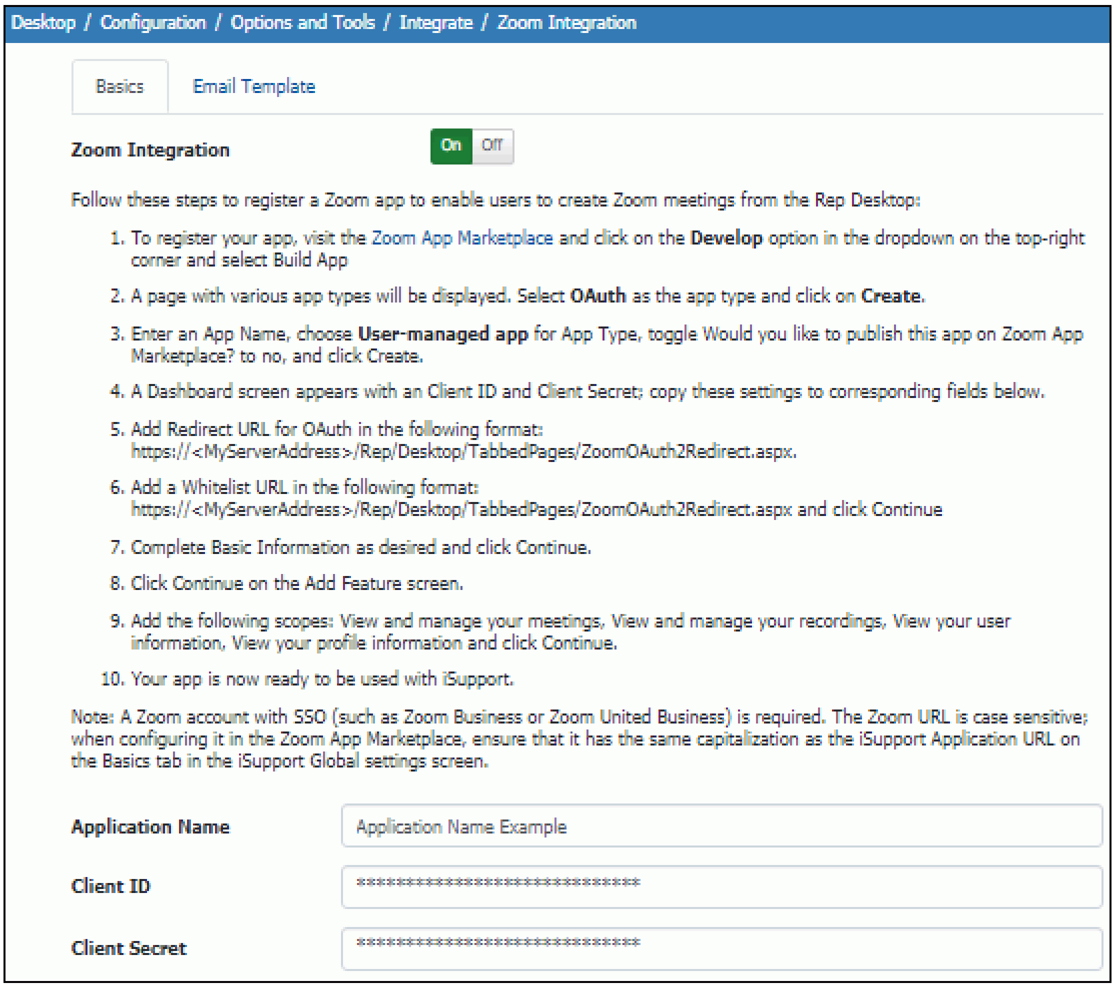
Microsoft Active Directory User Name/Microsoft Active Directory Password - If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a login for authentication when queries are performed. The username should be in the following format: DOMAINNAME\usernameIf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

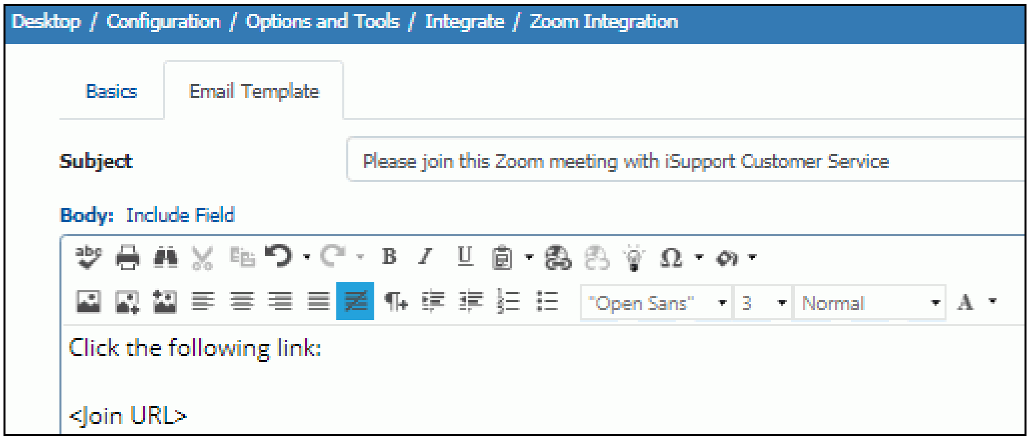
Use the Options and Tools | Integrations | Zoom Integration configuration screen to enable a Zoom Meeting option to appear in the Incident, Change, Problem, and Customer screens for scheduling an on-demand Zoom meeting. When the option is selected, a Generate Join URL dialog will appear for you to enter 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.

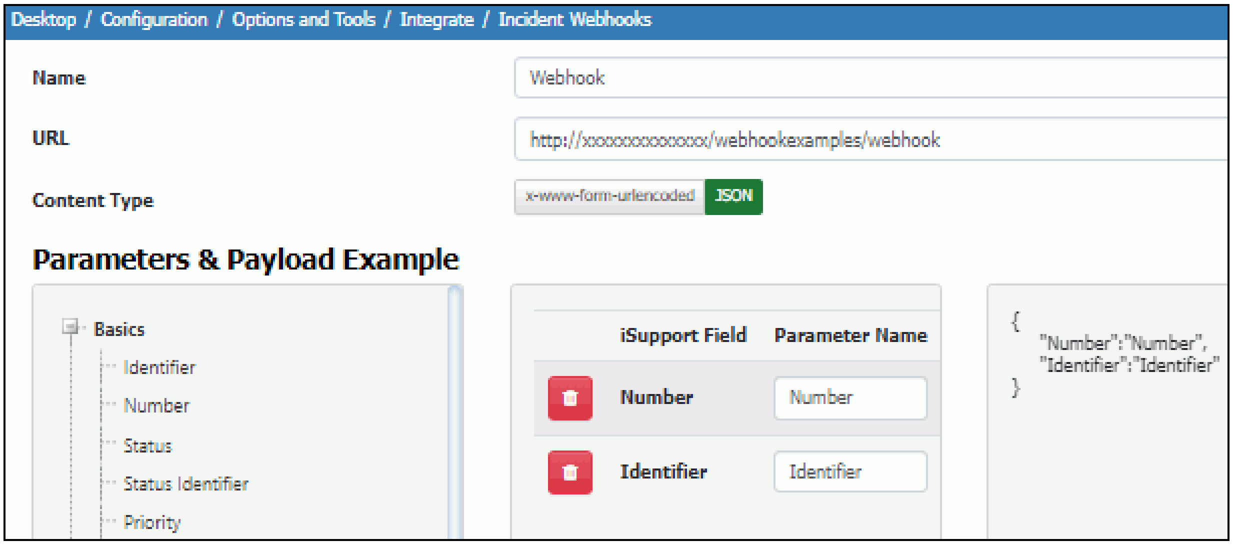


Zoom meetings can be included in work item screens; add the Zoom Meetings field to a work item screen layout via the Layouts configuration screen.

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.