

Purchasing functionality is included if you have the Service Desk edition. Use it to track products and services, submit purchase requests, and associate orders with service requests and incidents, problems, changes, and assets.

Purchase	New View Co	onfiguration	-												
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	and Exit Save and	_	nt Delete	Font Size	Counters	_	ry Add Asse	t Use Templa	ate Ad Ho	c Approval					
	File			Dis	play			Actions							
Desirient	Steve Johnso	. 0			Number	MPUD	643856			Cost		0			
Recipient	Steve Johnso	on 😈			Number	MBHD	043800			Cost		ACCO	ounting		
Requested	Steve Johnso	on 🚯			Status	Oper	1		~	Gente					
Ву										Job		Man	ager		
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	Laptop	Technolog		ole Itop 🚯	8675309	0/1	\$900.00	\$900.00 \$	73.80 🕦	\$973.80			12/8/2022		Yes

Note that a purchase request becomes a purchase order after it has been saved or approved (if applicable). Only the received quantity can be changed by support representatives with no Edit permission. When the expected quantity for all line items has been received, the order can be closed. Closed orders cannot be reopened or edited; at any time, a support representative can set the status to a Closed status even if some items have not been received. Asset records can be created for the total quantity if all of the expected quantity for a line item is received.

Count tracking can be enabled for asset types; if a Product record with a count-enabled Asset type is selected on a purchase request and the Asset Create checkbox is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

# **Configuration Overview**

### Basic Configuration

- Enable Purchasing functionality and set basic Purchasing options via Feature Basics. See "Setting Purchasing Basics Configuration Options" on page 4. Note that Purchasing functionality can only be enabled if Asset functionality is enabled (purchase requests use predefined asset types with associated vendors and products).
- Product records are grouped according to asset types; configure asset types via the Asset Management tab in the Feature Basics screen. See "Configuring Asset Types" on page 7.
- Product records must be associated with a product vendor. You can:
  - Designate customers and companies as vendors via the Vendor checkbox in the Customer or Company Profile screen (accessed via the iSupport Desktop). Once this checkbox is selected, the Vendor Products

section appears at the bottom of the screen for associating Product records later. (You can associate a vendor in the Product screen as well.) See the online help for more information.

- Designate support representatives as vendors in the Support Representative Profile screen. Note that if you plan to use the Charge/Deduct Time Worked feature, the support representative entering work history must be designated as a vendor.
- Import vendor product data from a Microsoft Excel .xlsx file via the Vendor Product Import screen. See "Importing Products for a Vendor" on page 15.
- Use the Product screen to create Product records using predefined asset types and vendors, and enable a product to be available via the mySupport portal. See the online help for more information.

#### Creating Purchase Requests

- You can manually create purchase requests via the Purchase Request screen, as well as in the Incident, Problem, Change, and Asset screens. See the online help for more information.
- Customers can submit and view purchase requests via a mySupport portal. See the online help for more information.

#### Customizing iSupport Defaults

- Support includes a default Purchase screen layout with a comprehensive set of fields for tracking Purchase 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 purchase request templates. See "Configuring Screen Layouts" on page 29.
- You can create custom status labels for the Purchase status levels of Open and Closed. See "Defining Custom Status Labels" on page 27.
- If there are fields you need that are not included in iSupport by default, you can create custom fields. See "Configuring Custom Fields" on page 17.
- You can include a field for entering or automatically generating a custom number. See "Defining Custom Numbers" on page 24.
- You can enable your customers to submit and view Purchase Request records on mySupport portals, and you can customize the submission and display screen layouts. See the online help for more information.

#### Sending Notifications

- You can use Purchasing rules to send Desktop and email notifications when specified conditions based on Purchase record fields or events are met; for example, you can configure a rule to send a notification when the status of a Purchase record is modified. See "Configuring Rules and Rule Groups for Purchasing" on page 52. You can use or copy and modify iSupport's default notifications, or you can create new custom notifications. You can include data from Purchase records and designate any applicable recipients.
- You can send correspondence email from the Purchase Request screen. Correspondence can include data from Purchase Request 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 create purchase templates for frequent requests with similar content. iSupport's Service Catalog functionality enables customer requests of services, products, policies/procedures, etc. utilizing configured purchase request templates. See "Configuring Purchase Request Templates" on page 42.
- You can require a Purchase Request record to be approved before most functions can be performed; see "Configuring Approval Cycles" on page 45. Approval cycles are initiated via Purchasing rules; see "Configuring Rules and Rule Groups for Purchasing" on page 52. You can enable a support representative to override an approval (specify a verdict) if not designated as an approver for the cycle in effect via a setting in the Core Settings | Support Representative Profile screen.
- You can set up cost centers and job functions for use in reporting. See "Configuring Cost Centers and Job Functions" on page 16.

- You can automatically change field values on Purchase Order records via Purchasing rules. See "Configuring Rules and Rule Groups for Purchasing" on page 52.
- Count tracking can be enabled for asset types; if a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record. See the online help for more information.
- When entering work history in the Incident, Problem, and Change screens, you can add or deduct a charge on an associated purchase order.
- You can configure webhooks to post Purchasing data to a web application via Purchasing rules. See "Configuring Rules and Rule Groups for Purchasing" on page 52.

#### Managing Purchase 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 Purchase records. See "Archiving and Database Maintenance" on page 71.
- You can configure roles/permissions for support reps and rep groups using Purchasing functionality via the Support Representatives screen. See the online help for more information.

# **Setting Purchasing Basics Configuration Options**

The Purchasing Basics screen enables you to set basic options such as defaults and history options.

## Completing the Basics Tab

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

Desktop / Configuration / Core Settings /	Basics				
Enable Features	Basics				
Asset Management	Require Comments	Yes No			
Change Management	Enable Work Type on Work History Dialogs	Yes No			
Configuration Management	Linable Work Type on Work history bialogs				
Incident Management	Default Work Type	Support	<b>*</b>	+	
Knowledge Management	Enable Work Start and Stop Dates on Work History Dialogs	Yes No			
Opportunity Management	Display Work History and Time Worked Prompt on Purchase Save	Yes No			
Problem Management	Require Time Worked in Work History for Purchase	Yes No			
Purchasing	Require Comment in Work History for Purchase	Yes No			
Service Contract Management					
Survey	Include Customer Work History	Yes No			
	Include Work History Notes in Customer Work History Dialog	O Do Not Include			
		Automatically Include Include With Support Re	ep. Rev	view	
	Default Status	Open	~	+	
	Default Closed Status When All Items Received	Closed	~	+	
	Allow Approvers to Edit During Approval Cycle	Yes No			
	Allow Approvers to Edit During Approval Cycle				
	Default Correspondence Template	Purchasing Cover Letter	~	+	ø

**Require Comments** - Select Yes to require completion of the Comments field on a purchase request on initial save. This setting applies to requests submitted via the Desktop and mySupport portals.

**Enable Work Type on Work History Dialogs** - Select Yes to include a Work Type field in the Work History dialog in the Purchase Request 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 41.

**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 Purchase Save dialogs in the Purchase Request screen.

😻 Add Work History Note - Dialog 💷 💷 💌						
Work Type:	Service	] 1				
Work Start:	🗰 🛛 9/20/2019 11:45 AM 🖸					
Work Stop:	🗃 🗿 9/20/2019 12:07 PM 🖸					
Time Worked:	Hr(s) 22 Min(s)	E				
Work History Comment:						
Charge for this work: Work Hours						
Rate: \$ 50.00						
Deduct for this we	ork: Select a Line Item	•				

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 purchase request 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 aclendar and O clock options to select the date and time; the difference will populate automatically. The C refresh optionwill 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).

**Display Work History and Time Worked Prompt on Purchase Save** - Select Yes to display the Save dialog every time a support representative saves a purchase request.

Purchase Save	
Work History Comment:	O Hr(s) Min(s)
Verified support contract with vendor.	
Charge for this work: - Select a Product Rate: \$	
Deduct for this work: - Select a Line Item -	

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

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

**Include Customer Work History** - Select Yes to include a field on the Purchase Request screen that includes work history notes for display when customers view their purchase requests/orders on the mySupport portal. The field will include basic purchasing events, and can include:

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

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

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

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

**Default Closed Status When All Items Received** - Select the Closed status to assign to purchase orders when the quantity received (before the slash in the Quantity field) is equal to the expected quantity (after the slash in the Quantity field).

Allow Approvers to Edit During Approval Cycle - Select Yes to enable support representatives designated as approvers (or those with Approval Override) to have access to all functionality except Status in records in an approval cycle. You can configure the Pending Purchase Updated notification to be sent when the Edited During Approvals event occurs via the Rules screen.

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

# Configuring Asset Types

Use the Asset Management Types tab in the Core Settings | Feature Basics configuration screen to set up asset types with fields and notifications for tracking similar assets (for example, printers and laptops).

Health In:	surance	Bar	ry (In) 🗘 🤊	<b># -</b>					
sktop / Configuration / Core Settings / Asset Basics									
Enable Features	Тур	oes Agents							
Asset Management									
Change Management	Asse	et Types	Search						
Configuration Management									
Incident Management	Cre	eate Copy Delete	Show Pending Deletion						
Knowledge Management		Туре 🕇	Count Tracking Enabled	Scanning Enabled	Layout				
Opportunity Management		Cell Phone	No	No	Phones				
Problem Management		Computer	Yes	Yes	Default				
Purchasing	0	Desktop	No	Yes	Default				

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

Use the Basics tab to set up asset types, enter a login for running asset scans, and set up optional and custom fields.

Desktop / Configuration / Core Settings /	Asset Basics				2	
Basics >	Asset Type Name	Laptop				
Custom Fields	Layout	Laptops	•	+	1	
Maintenance/Warranty	Rule Group	Default Asset Rule Group		+	#	
	Enable Count Tracking	On Off				
	Enable Scanning	On Off				
	Default User Name for Dynamic Scanning	Administrator				
	Default Password for Dynamic Scanning	Reset				
	Default SNMP Community String for Dynamic Scanning	public				
	Optional Fields	<ul> <li>✓ Owner</li> <li>✓ Model</li> <li>✓ Tag Number</li> <li>✓ Purchase Date</li> </ul>	<ul> <li>Location</li> <li>Manufacturer</li> <li>Serial Number</li> <li>Comments</li> </ul>			

**Asset Type Name** - Enter the name of the asset type. Asset types classify similar assets and enable custom and optional fields to display when recording information about an asset.

**Layout** - Select the layout containing the fields and tabs that will display when the type is selected in the Asset screen. Asset layouts are configured in the Asset Layouts configuration screen; see "Configuring Screen Layouts" on page 29 for more information. If None is selected in this field, the layout designated as default in the Asset Layouts screen will be used when an Asset record of this type is created.

**Rule Group** - Select the Asset rule group that will take effect when an Asset record with the asset type is saved. Asset rules perform actions when specified conditions based on Asset record fields or events are met; these actions can include changing a field value, executing a webhook, and sending a notification via SMS, Desktop, or email.

**Enable Count Tracking** - Select Yes to enable Unit Count, Unit Label, Unit Cost, and Unit Price fields to appear in the Asset screen if the type is selected. When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can enter the number of units used and decrement the unit count. A Low Unit Count notification can be configured to be sent when the minimum unit count is reached; it is sent on the schedule of the Asset Unit Count Tracking agent.

Desktop / Configuration / Core	Settings / Asset Basics					
Basics >	Asset Type Name	Labor Hours				
Custom Fields	Layout	Labor Hours	¥ + /			
Maintenance/Warranty	Rule Group	None	<b>*</b> + /			
Notifications	Enable Count Tracking	On Off				
	Minimum Count Used	1.00				
	Default Count Used	1.00				
	Who to Notify of Low Unit Count	✓ Other ak@gwi.com				
	Email Addresses of Other Recipients					
	Number of Units Remaining to Send Notification	3.00				
	Enable Scanning	On Off				
	Optional Fields	Owner Model	<ul> <li>Location</li> <li>Manufacturer</li> </ul>			
		Tag Number	Serial Number			
		Purchase Date	Comments			

Count-related fields will be included in the Asset screen if the type is selected.

Asset	New	View	Cor	nfiguration		
H			Ð	Ĩ		
Save	Save and	Exit	Print	Delete	Print Label	Generate QR Code
		File				Actions
Туре	2			Labor Ho	ours	
Nam	ie			Facilities	s Hour	
Тад	Number					
Loca	ation			HQ		
Unit	Label			Hour		
Unit Count		998.00				
Unit	Cost			\$125.00		
Unit	Price			\$125.00		

When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can select the Edit Count Used link, enter the number of units used, and decrement the unit count.

Update Asset Counts	
Name	Count Used
IT Support Hour	1.00 Hour
	Cancel Update

If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

**Minimum Count Used** - Enter the minimum amount that can be entered in the Count Used field in the Update Asset Counts dialog.

**Default Count Used** - Enter the amount to appear by default in the Count Used field in the Update Asset Counts dialog.

Who to Notify of Low Unit Count/Email Addresses of Other Recipients - A Low Unit Count notification can be customized via the Custom Notifications screen. Select the person to whom the Low Unit Count notification should be sent:

Select Owner to send the email to the owner assigned to the asset (in the Asset entry screen). The notification will contain asset details (for example, the name, type, and expiration date.)

Select Other to send the email to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the Asset record.

Be sure to enable the Asset Item Inventory Tracking agent in the Asset Agents screen; it checks unit counts and send notifications when the minimum is reached.

Number of Units Remaining to Send Notification - Enter the count (of total units remaining) at which the low unit count notification should be sent.

**Enable Scanning** - Select Yes if asset scans will be performed on assets assigned this asset type. Asset scans can be performed on non-Windows SNMP-enabled devices in your network, computers with Windows 98 and above, or any other WMI-compliant machine (WMI must be installed and active).

**Default User Name for Dynamic Scanning/Default Password for Dynamic Scanning** - If asset scans are enabled, enter the user name and password to be used for accessing the machine to be scanned. This login will be validated by the WMI process of the target machine in order to return the requested data. Traditionally, the login must be a member of the Administrators group of the machine to be scanned, but permissions may be modified to a different structure.

When a dynamic scan is initiated, the Dynamic Asset Scan dialog appears as shown below. If you have set up a default user name and password for the selected asset type, the support representative can select Yes in the Use Default Credentials checkbox to use this default user name and password.

If No is selected in the Use Default Credentials field, the User Name and Password fields will be enabled for entering a login.

**Default SNMP Community String for Dynamic Scanning** - If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device). Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".

Note: If a login is used to access a Microsoft Windows XP machine, a profile and a folder are created in the Documents and Settings folder.

The Dynamic Asset Scan dialog is shown below; it appears when a dynamic scan is initiated in the Asset or Incident screen.

Check All Uncheck All				View Tour 🚯
Computer Systems			System Ports	
Computer System	Operating System	stem	Modems	Network Adapters
Services	Software Title	15	Parallel Ports	Serial Ports
Running Processes	Hot Fixes		Port Connectors	Logical Drives
Peripherals			Hardware Controller	s 🔳 🗹
Infrared Devices	✓ Keyboards		✓ IDE Controllers	Floppy Controllers
Pointing Devices	🗷 Desktop Moni	tors	Video Controllers	PCMCIA Controllers
System Hardware			Drives	Image: Second
Processors	Physical Mem	ory	Disk Drives	CD-ROM Drives
BIOS	System Slots		Floppy Drives	
·	Host Address:	x.x.x.x	` <u>`</u>	
	User Name:			
	Password:			
	Community:	public		
		S	can	

**Note:** If a login is used to access a Microsoft Windows XP machine, a profile and a folder are created in the Documents and Settings folder.

In the **Optional Fields** section, select the checkbox next to each field that should display when the asset type is selected in the Asset screen.

## **Entering Custom Fields**

In the **Custom Fields** section, select the Add link to set up a custom field that will display in the Custom Fields section when the asset type is selected in the Asset screen.

Basics >	Row	1 •
Conditional Display Options	Label	Service Date
	Tooltip	Date of service
	Required	On Off
	Туре	Date Field •
	Default Value	

## Configuring Maintenance and Warranty Tracking

Use the Maintenance/Warranty tab to set up tracking of maintenance and warranty expiration dates. Expiration notifications are enabled on the Notifications tab. Be sure to enable the Asset Reminder agent on the Asset tab in the Asset Agents screen; see "Scheduling and Running Asset Agents" on page 28.

Basics	Track Maintenance Information	On Off
Custom Fields	Who to Notify of Maintenance Expiration	🕑 Owner 🔲 Other
Maintenance/Warranty	Email Addresses of Other Recipients	
Notifications	Number of Days After Asset Creation to Default Maintenance Expiration Date	255
	Number of Days Prior to Maintenance Expiration to Send Reminder	2
	Track Warranty Information	On Off
	Who to Notify of Warranty Expiration	🖉 Owner 🔲 Other
	Email Addresses of Other Recipients	
	Number of Days After Asset Creation to Default Warranty Expiration Date	255
	Number of Days Prior to Warranty Expiration to Send Reminder	2

**Track Maintenance Information** - Select Yes to enable maintenance notification functionality, which sends notifications when a maintenance expiration date is near.

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

- Select Owner to send the maintenance reminder email to the owner assigned to the asset (in the Asset entry screen). The notification will contain asset details (for example, the name, type, and expiration date.)
- Select Other to send the maintenance expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the asset record.

**Number of Days After Asset Creation to Default Maintenance Expiration Date** - Enter the number of days after the asset record is created to display as default for the maintenance expiration date.

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

**Track Warranty Information** - Select Yes to enable warranty notification functionality, which sends notifications when a warranty expiration date is near.

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

- Select Owner to send the warranty reminder email to the owner assigned to the asset (in the Asset entry screen).
- Select Other to send the warranty expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person.

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

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

## Selecting Notifications for Asset Events

Use the fields on the Notifications tab in the Asset Types screen to select notifications and recipients for maintenance/warranty reminders. You can select the default notification or a predefined custom notification; select Create New Custom Notification to access the Custom Notifications screen to create one. Note that the recipients can include both support representatives and customers, and the default notification text is different for each.

Basics	Notification Event and Recipient Mapping Maintenance Expiration Reminder		
Custom Fields	- Owner:	iSupport Default	
Maintenance/Warranty	Other:	Create New Custom Notification  Support Default	
Notifications	Warranty Expired Technology Warranty Expired Technology	ration Reminder	

**Maintenance Expiration Reminder** - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty tab. The notifications will be sent on the schedule of the Asset Reminder agent.

**Warranty Expiration Reminder** - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty tab. The notifications will be sent on the schedule of the Asset Reminder agent.

**Low Unit Count Notification** - Select the recipients and notifications to be sent according to the settings on the Basics tab. The notifications will be sent on the schedule of the Asset Item Inventory Tracking agent.

## Scheduling Asset Agents

Asset Reminder Agent/Time Agent Should Run Each Day - The Asset Reminder agent searches for warranty and maintenance expiration dates. If it is the specified number of days before the warranty or maintenance expiration date, it will send an email reminder to the individuals specified in the Asset record. Select Yes to enable the Asset Reminder agent. After selecting Yes, use the Time Agent Should Run Each Day field to select the time the agent should run.

Asset Reminder Agent				
This agent sends notifications to the individuals specified in the Asset Configuration screen, based on the specified number of days prior to the warranty or maintenance expiration date.				
Enable	Yes No Run Now			
Time Agent Should Run Each Day	10:30 PM 🔻			

Asset Unit Count Tracking Agent -If count tracking is enabled for an asset type and the type is selected in the Asset screen, a count and low item threshold can be entered for an asset. The count can be decremented via entries in the Incident, Problem, and Change screens and notifications can be sent to the individuals specified in the Asset Type Configuration screen when the count reached the specified minimum number of remaining units. Select Yes to enable the agent to check unit counts and send notifications when the minimum is reached. After selecting Yes, use the Time Agent Should Run Each Day field to select the time the agent should run.

Asset Unit Count Tracking Agent				
This agent sends notifications to the individuals specified in the Asset Type Configuration screen based on the specified minimum threshold of remaining units.				
Enable	Yes No Run Now			
Time Agent Should Run Each Day	10:30 PM 🔻			

Asset Scheduled Scan and Monitoring Agent - After entering a scheduled scan and monitoring definition (see "Configuring Scheduled Scans and Device Monitoring" on page 56), select Yes in this field to enable the Asset Scheduled Scan and Monitoring agent which checks scheduled scan definitions, initiates scans according to schedule, and enables monitoring if configured in an scheduled scan definition. This agent runs every minute. Network monitoring processing adds device state change entries in the database. Use the Monitoring includes device state change entries in the database; days to retain these entries field to control database growth by entering the number of days in which these entries should stay in the database.

Asset Scheduled Scan and Monitoring Agent			
This agent checks scheduled scan definitions, initiates scans as scheduled, and enables monitoring if configured in an scheduled scan definition.			
Enable	Yes No		
Monitoring includes device state change entries in the database; days to retain these entries	30		

Auto Asset Create from Scheduled Scan Agent - Assets can be created automatically for machines that are involved in scheduled scans but not associated with an existing record; see "Creating Asset Records Automatically Based on Scheduled Scans" on page 73 for more information. Enable this agent to create asset records for each machine involved in an scheduled scan that does not have an association with an asset record. It will run every hour based on the time at which the iSupport Agent Manager service is started. A dialog will appear for selecting the Asset

record to be used as a template for automatically creating records; this is a good method to use for control in building asset records.

Auto Asset Create from Scheduled Scan Agent			
This agent creates an Asset record for eac	This agent creates an Asset record for each asset scan that is not associated with an asset.		
Enable	Yes No Run Now		
Populate Asset Serial Number Field using	OS Serial Number	¥	
Default Asset Record Template for Automatic Asset Creation	Laptop 1		

**Populate Asset Serial Number Field Using** - Select one of the following for populating the Asset Serial Number field when Asset records are created automatically for machines that are involved in scheduled scans but not associated with an existing record: the operating system serial number or the BIOS serial number. If the BIOS Serial Number is selected but not available, the machine name or ID defined in the scheduled scan definition will be used.

Asset Record Template for Automatic Asset Creation - Select this link to select the name of an existing Asset record to use as a template when the Auto Asset Create from Scheduled Scan agent is run. The record's asset type will determine the fields that will appear on the automatically-created record. See "Creating Asset Records Automatically Based on Scheduled Scans" on page 73 for a table listing how the fields are populated.

**License Management Agent** - The License Management agent scans all scheduled scans and searches for instances of the software titles specified in Software License Profile records. It compares the actual quantities found against the conditions, flags the profiles that meet the conditions, and updates the profiles with the actual quantities. Notifications are sent if configured.

License Management	t Agent
	s and searches for the software titles specified in Software License Profile records. It compares the condition specified in the profiles, flags the profiles that meet the condition, and updates
Enable	Yes No Run Now
Time Agent Should Run Each D	ay 12:30 AM v

# Importing Products for a Vendor

Use the Options and Tools | Integrate | Vendor Product Import screen to import Product data from a comma separated value (.csv) or Microsoft Excel .xlsx file. Note that the Microsoft Access Object Library 12.0 must be installed for this feature.

This configuration option requires customers, companies, or support representatives designated as vendors, and you'll need Purchasing Author/Edit permissions in your Support Representative Profile record in order to use this feature.

Vendor Type	Support Representative				۲		
Vendor	Ron Deeter						۲
File Name	Choose File	ProductLi	stA-3.xlsx	Load			
Worksheet	Software						Ŧ
	Vendor Source	e i	Support Colum	ns	Mapped C	olumns	5
		*	Allow Decim		<ul> <li>Descrip Rate&gt;F</li> </ul>	Asset ption>D Rate	Type escription to mySupport
	Name	Descripti	ion	Rate	Asset Type		Available to mySupport
	LINX VIP-E	LINX VIF	P-E	\$100.00	Annunciator - Sof	itware	2
	LINX VIP	LINX VIF	•	\$100.00	Annunciator - Sof	tware	ø
							Preview Import

- In the Vendor Type field, select the type of vendor: Company, Customer, or Support Representative. Then select
  the previously-defined company, customer, or support representative vendors to associate with the imported
  Product records.
- In the **File Name** field, select the Microsoft Excel .xls file containing the product information. Click the Load button to populate the Vendor Source column with the columns in the spreadsheet. The worksheets in the file appear in the Worksheet field; select the worksheet containing the data to import.
- Map the columns in the Vendor Source list to the columns in iSupport.
  - To map a column, select a column in the Vendor Source list and the corresponding column in the iSupport Columns list. Then click the right arrow 
     button. The associated fields display under Mapped Columns.
  - To remove an entry from the Mapped Columns list, select the entry and click the left arrow 🗲 button.
- Click the Preview button to display the mapped columns using data from the spreadsheet.

When finished, click the **Import** button to execute the import.

## **Configuring Cost Centers and Job Functions**

Use the Purchasing Cost Centers and Job Functions screen to define cost centers and associated job functions for use in reporting. You can associate cost centers with customers and companies via the Customer Profile and Company screens, as well as the \$\$ Associate Cost Center option on customer views on the Desktop.

If you wish to associate job functions with a cost center, first define the job functions by clicking the Create link on the Job Functions tab in the Purchasing Configuration screen.

Cost Centers	Create Delete
Job Functions >	Name -
	Manager

Use the Cost Centers tab to create a cost center and associate job functions if applicable. Click the Create link to display the Cost Center screen for entering the name, selecting the predefined job functions, and setting up associated custom fields to appear when the cost center is selected in the Purchase Request/Order screen.

Name	9			Accounting			
Job F	unctions			🔽 Manager			
Cust	om Fields ate De	s: elete					
	Row 🔺	Label	Туре	Default Value	Required	Available to mySupport	Conditional Display
	1	Expense Level	Text Box		No	Yes	No

# **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.

Desktop / Configuration / Option	s and Tools / Customize / Incident Custom Fields		
Basics >	Row	1	Ŧ
mySupport Access	Label	Server OS	
Conditional Display Options	Tooltip	Server Operating System	11
	Required on Save	On Off	
	Required on Close	On Off	
	Available to Reps	On Off	
	Encrypt	On Off	
	Туре	Check Box	Ŧ
	Data Source	None 🔻 🕇	
	Options	✓ Windows	
		Mac	@ Ø
		Other	
	Max Columns	2	

**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 22 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"</li>

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.

Check Box	Option 1      Option 2      Option 3	Date Field	03/08/2019	
Radio Button	● Yes   ○ No   ○ I don't know	Date/Time Field	O3/07/2019 3:27:00	
Text Area		Single Selection Drop- Down	Option 1	٣
Text Field		Multiple Selection List Box	Option 1 Option 2 Option 3	• •
Currency Only	\$ 123	Hyperlink	iSupport's Web Site - Edit	
Number Only	123			

**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  $\checkmark$  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 22 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.

Basics >	Row	9 🔻			
mySupport Access	Label	Install Date			
Conditional Display Options	Tooltip	Select a date between one and five days after today.			
	Required on Save	On Off			
	Required on Close	On Off			
	Available to Reps	On Off			
	Encrypt	On Off			
	Туре	Date Field			
	Default Value	@Today+2			
	Validation	On Off			
	Date Validation Type	Between (Inclusive of Valid Start and 🔹			
		Note: 0 = today, positive values for future dates, negative values for past dates.			
	Valid Start	1 Days			
	Valid End	5 Days			

**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.

Desktop / Configuration	Desktop / Configuration / Options and Tools / Customize / Incident Custom Fields						
Basics		Available to mySupport	On Off				
mySupport Acc	ess 🔉	Editable on New Incidents	On Off				
Conditional Dis Options	play	Editable on Existing Incidents	On Off				
		Select mySupport portals with access	<ul> <li>http://xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</li></ul>				

### 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.

esktop / Configuration / Options and Tools / Customize / Incident Custom Fields					
Basics	Enable Conditional Display	On Off			
mySupport Access	Match Any V		+		
Conditional Display Options	Site Visit Required V Is	Yes	• •		

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.

Incident	Name	Asset Types
Problem		
Change	Connection String	server=.; database=cSupport; Trusted_Connection=True
Customer	SQL Query	select Type from ASSET_TYPES
Company		÷.
Asset		Retrieve Items
Purchase	ltems	Cell Phone
Service Contract	items	Copier Desktop
Configuration Item		Laptop Office Supplies
Knowledge Entry		Printer Server Tablet
Opportunity		Training Widgets
Advanced	Active	Yes No
Data Sources 🔉 🔉	Active	
	Synchronization Interval	15 minute 💌

**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.

Desktop / Configuration / Option	s and Tools / Customize / Incident Custom Fields	
Basics >	Row	4
mySupport Access	Label	Affected Item
Conditional Display Options	Tooltip	
	Required on Save	On Off
	Required on Close	On Off
	Available to Reps	On Off
	Encrypt	On Off
	Туре	Multiple Selection List Box
	Data Source	Asset Types 🔻 🖊
	Options	Cell Phone
		Copier
		🗆 Desktop
		Laptop
		Office Supplies
	Max Rows	2

# **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.

Include Custom Incident Number	Yes No		
Custom Number Label	ID	(14 cha	racters maximum) 📀
Method	Automatically Gen	erated	Manually Entered
Required on Save	On Off		
Mark Read Only Once Saved	On Off		

## 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.

Current Character Count	12 out of 15
Prefix	3
Suffix	3
Sequence Number	6
Custom Number Example	LBL1LOL

### Configuring the Prefix

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

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

Use Prefix	On Off
Prefix Options	
Prefix Type	Static Dynamic
Prefix	LBL

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.

Prefix Options			
Prefix Type	Static Dynam	nic	
Prefix	<ul> <li>ddmmmyy (08Mar19)</li> <li>mmmyy (Mar19)</li> <li>yyyy (2019)</li> </ul>		
Prefix Separator	-	(Optional, 1 character maximum) 📀	

#### Configuring the Sequence

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).

Sequence Details	
Start Sequence At	1
Restart Sequence Yearly:	On Off
	Sequence will restart earlier if number reaches maximum allowed (999999999).

#### Configuring the Suffix

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.

٠

•

Suffix Options			
Suffix Type	Static Dynan	nic	
Suffix	<ul> <li>ddmmmyy (08Mar19)</li> <li>mmmyy (Mar19)</li> <li>yyyy (2019)</li> </ul>		
Suffix Separator	-	(Optional, 1 character maximum) <b>3</b>	

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

Suffix Options	
Suffix Type	Static Dynamic
Suffix	LOL

# **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.

esktop / Configuration / Op	tions and T	ools / Cus	stomize / Custom Status	Labels			
Statuses		Sea	rch				
Change	Crea	te De	ete Order of Precede	ince			
Company			Label	mySupport Label	Туре	Position 1	Default Li
Configuration Item		1	Open	Open	Open	1	Yes
Incident >		1	Closed	Closed	Closed	2	Yes
Problem		1	Suspended	Open	Suspended	3	No
Purchase		1	Reopened	Open	Reopened	4	Yes
Service Contract		1	Scheduled	Scheduled	Scheduled	5	Yes
		1	Update Added	Updated	Open	6	No
		1	In Process	In Process	Open	7	Yes
		1	Customer Submitted	Customer Submitted	Open	8	Yes
		1	Declined	Declined	Open	9	No

Label - Enter the name for the status.

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

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

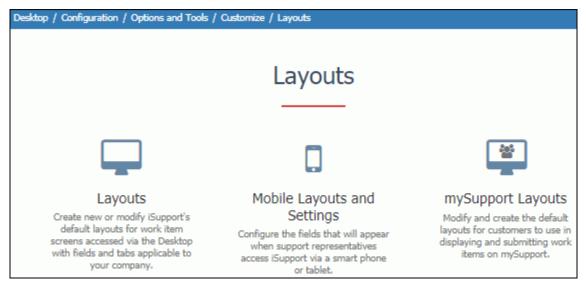
**Position** - Select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)

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

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

# **Configuring 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.

Desktop / Configuration	/ Options and Tools /	Customize / Layouts / Layouts					
Layouts Search							
Asset		Create Copy Delete Order of Precedence					
Change		Name *	Default				
Company		Default					
Configuration	Item	Facilities					
Customer		Human Resources					
Incident >		Information Technology	Default				
Knowledge E		Printer Issue					
		Sales					
Problem							
Purchase							

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.

Desktop / Configuration / Options a	and Tools / Customize / Layouts / Incident Layouts	
Layout Colors Custom Me	enu Actions	
Name	Human Resources	
Tutorial	Submitting HR Issues	
Default	Yes No	
Customer Details		
Title	Customer 🗶 🗱 (Display Name)	
Display Avatar	eft Right No × & (Phone) × & (Email Address)	
	/es No	
Skype/Lync® Status		
Add a field	•	
Main Layout		
Basics	Details	
···· Previous Assignee	× # Number × # Created Date	
Group	* # Number * # Created Date	
Group Type	× # Status × # Closed Date	
Category *	× # Priority × # Assignee	
Rule Group		
Top Level Description		
Short Description		
Top Level Short Descrip	Tabs	
Modified Date	Orientation	
Modified By		
···· Author	Add a Tab	
Related Hierarchy Feedback mySupport Submission	Details X History X E Custom Fields X Others to Notify X	
List Items	Assets × So Associated Work Items × Attachments × Misc. ×	
Associated Work Item Co	Text Details	
	Icon Choose	
	* # Description	
		<u> </u>

 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.

Customer Details		
Title	Customer	<ul> <li>Oisplay Name)</li> <li>O(Company)</li> </ul>
Display Avatar	Left Right No	o (Location)     o (Department)
Display Microsoft® Skype/Lync® Status	Yes No	o (Phone)     o (Email Address)
Add a field	•	8 8 (Customer ID)

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 in 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.

Incident New	View C	Configuration	Google 👘 🔣 💭	▼ View Tour	
<u>e</u>	⊟Print ∭Delete	Font Size - #Counters -	🖓 Add Asset 👔	Override Data ∰Ten Route	rarchy - 🔀 Si
File		Display		Actions	
per o	lenry Ider M Vancouver, VA	Numbe Status Priority	Open	~	Assignee Created Closed
	ispended ecpened	Follow Date	up 🗎 12.	/1/2023 🗙	Category Q

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

•

Customer Avatar:		Customer Group:	Customer Advisory Board
Customer First Name:	Steve	Customer Groups:	Adobe Users
Customer Last Name:	Johnson		Customer Advisory Board Help Desk
Customer Email:	<u>sj@gwi.com</u>	Customer	Administration
Customer Phone:	360-397-1004	Department:	
Customer Location:	Headquarters	Customer Company:	LBL Services

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.

Desktop / Configuration / Options and Tools / Customize / L	ayouts / Customer mySupport Layouts	
Name Tutorial	Customer Profile mySupport Layout	
Basics List Items Custom Fields Current Project	Details          × © Last Name         × © First Name         × © Training Taken         Configure Field	× © Email × © Phone
	Label Width 25% V Allow Edit Yes No	
	OK Cancel	

## 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.

Main Layout			
Basics Group Group Type Category * Modified Date Modified By Author List Items	Details × * Number × * Status × * Priority × * Assignee	<ul> <li>Created Date</li> <li>Closed Date</li> <li>Rule Group</li> <li>Related Hierarchy</li> </ul>	
+ Custom Fields			
Associated Work Item Counts			

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

Main Layout			
Basics	Details		
Previous Assignee			
Group	× # Number	× @ Created Date	
Group Type	× & Status	× & Closed Date	
···· Top Level Description	× # Priority	× # Rule Group	
···· Short Description			
···· Top Level Short Description	* # Category	× 🗱 Assignee	
···· Modified Date			
···· Modified By			
Author	* # Related Hierarchy		
···· Feedback			
	·		

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:

Main Layout		
Basics     List Items	Details	
Custom Fields	× «Number	× # Created Date
Age Group	× #Status	× 🌣 Closed Date
Server OS	× # Priority	× # Rule Group
Department Code	× #Category	× # Related Hierarchy
Site	× #Assignee	
Associated Work Item Counts		1

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 36.

Main Layout		
Basics     List Items     Custom Fields     External Links     Custom Fields     Associated Work Item Counts	Details × * Number × * Status * * Priority	<ul> <li>× © Created Date</li> <li>× © Closed Date</li> <li>× © Rule Group</li> </ul>
	* Category     * Assignee	× & Related Hierarchy

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.)

Tabs									
Orlentation			Тор	)					•
Add a Tab									
×						lco	n Picke	er	
Issue		De	faults	+	New T	ab			
Text	Issue			Ð	&	$\approx$	Ø	$\Leftrightarrow$	
Icon	Choose		1		<u> </u>			Ť	, ,
× © Description			0	000		$\oplus$	۴ ۲	8	Îq
× # Resolution									

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.

	Details			
Basics				
- Assets - Scans	Tabs			
- Attachments - External Links	Orientation		Тор	٣
Configuration Items Others to Notify Associated Work Items Custom Fields	Add a Tab			
$ \longrightarrow  $	Text	History		
	lcon	Choose		
	× @History			

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, CI 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.

Desktop / Configuration / Options and Too	ls / Customize / Layouts / Asset Layouts	1					
Layout Custom Menu Actions							
Name	Widget	Widget					
Tutorial	None						
Default	Yes No						
		Configure Field					
Basics     Optional Type fields	Details	Display Label	Yes No				
Haintenance fields	× # Custom Fields	Label	Custom Fields				
Warranty fields		Label Width	25% 🔻				
List Items	Tabs	Custom Fields	Both Global Additional				
History Service Contracts	Orientation		OK Cancel				
Groups							

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

× @Number	Configure Field		
× ØStatus	Display Label	Yes No	<b>^</b>
× © Priority			
× © Followup Date	Label	Assets	
	Label Width	25%	
	Asset Grid Fields	Name	
abs		🗹 Туре	
		🗹 Tag Number	
entation		Serial Number	
		Open Work Items	
dd a Tab		Warranty Expiration	
		Manufacturer	
Custom Fi		Model	soc \
	Count Enabled Asset	Count Used	
$\mathcal{D}$ $\mathbf{x} \rightarrow \mathbf{x}$	Grid Fields	Name	
// Attachments // Cust		🗹 Туре	
		Tag Number	
at As		Serial Number	
		Unit Label	
on Cho		Unit Cost	*
/			

#### mySupport Layouts

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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.

Configure Field	
Display Label	Yes No
Override Label	Yes No
Label	Case
Label Width	25%
	OK Cancel

If configuring the **Category** field:

Configure Field	
Override Label	Yes No
Label Width	25% 🗸
Prompt	Yes No
Show Search	Yes No
Require Search Text for Results	Yes No
	OK Cancel

- 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.

Save	Staff	Category Select		
		prin	×	•
<u>Customer:</u>	Steve Johnson \\ 0	Error Hardware   <mark>Prin</mark> ter   Copier/Laser   Error		
Customer		S Hardware		
Avatar:	<b>X</b>	🕨 👹 Human Resources Request		
Customer	Steve	► Ц IT		

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

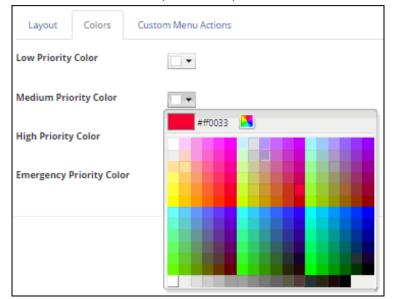
If including the Assets list field, select Yes in the **Show Comments** field to control display of the Comments field that may be included (depending on the asset type).

Configure Field	
Display Label	Yes No
Override Label	Yes No
Label Width	25%
Show Comments	Yes No
	OK Cancel

### Configuring Priority-Based Background Colors

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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.

Layout	Colors	Custom Menu Actions				
Tab Name	e: Google					
+						
Text:	Google					
URL:	http://www.google.com					
lcon:	Choose					
	<b>6</b>					

Example:



# **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.

Work Start:	<b>i</b> 0	9/7/20	019 11:4	10 AM	S	
Work Stop:	<b>ii</b> 0	9/7/20	019 12:4	45 PM	S	
Time Worked:	1	Hr(s)	5	Min(s)		
Work History Comment:						
Ran diagnostic	c tests, app	olied op	erating	system pate	ches	

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.)

Deskto	p / Configura	ation / Options and Tools / Customize / Work History Types	$\sim$				
Work	Work History Types Search x						
	Create De	elete					
		Name	Position A				
_		hame	l osition =				
	CB		5 🔹				
		Travel	1				
	/	Work	2				
		Billable	3				
		Nonbillable	4				

# **Configuring Purchase Request Templates**

Use the Purchasing Purchase Request Templates screen to create templates for purchase requests that occur frequently. You can set defaults for populating fields in the Purchase Request screen and mySupport portal (if applicable).

Desktop / Configural	tion / Options a	and Tools / Au	tomate / Template	s										
Basics >	Name						New	New Employee Equipment						
Custom Fields	Default Statu	15					Op	Open 🗸 🕇 🖉						
Format	Append Short Description/Comments to Existing Text						On	off						
Attachments	Make Available to Support Representatives					On	orr							
	Make Available to mySupport				On	On Off								
	Short Description					Nev	v Employee Equipr	ment						
	Approval Cycle					HR	Approval				•	• +		
	Rule Group					Def	fault Purchase Rul	e Group			•	• +		
	Cost Center					Accounting +								
	Job Function					Manag	Manager							
	Recipient					Unass	Unassigned 🗕 🕜 Create: Customer • Support Rep							
	Requested By					Unassigned – 🖉 Create: Customer • Support Rep								
	Bill To						Unassigned 🗕 🕜 Create: Customer • Support Rep							
	Comments as	s Placeholde	,				On off							
	Comments													
	Add Line Item Delete Line Item													
		Asset Type	Vendor	Product	Quantity	Rate	Amount	TaxesAndFees	Total	Comments	Expected (Days)	Delivery (Days)	Asset	Create
		Cell Phone	Technology PCS	iPhone More	1	\$600.00	\$600.00	\$49.20 <b>(</b> )	\$649.20					
							\$600.00	\$49.20	\$649.20					

**Name** - Enter a name for the purchase request template. This name will display for selection in the Purchase Request screen.

**Default Status** - Select the open status level to populate the Status field in the Purchase Request screen. Use the **±** Create New and *2* View/Edit options to access the Custom Status Labels screen.

**Append Short Description/Comments to Existing Text** - Select Yes to add a blank line and the text from the Short Description and/or Comments field to existing text when the template is applied to a saved purchase request.

Make Available to Support Representatives - Select Yes to include the template in the list of templates for selection in the Purchase Request screen.

**Make Available to mySupport** - Select Yes to allow the template to be used on the mySupport portal. You can create a link to the template using the mySupport Navigator screen.

Short Description - Enter the text to populate the Short Description field in the Purchase Request screen.

**Approval Cycle** - Select the predefined approval cycle to assign to purchase requests created via this template. This will override any other approval cycle (customer, category) associated with a purchase request.

**Rule Group** - If applicable, select the rule group to apply when the template is selected in the Purchase Request screen. The rule group assigned to the template will replace any existing rule groups that may be in effect (for the

customer or customer's company). Use the 🛨 Create New and 🗹 View/Edit options to access the Purchasing Rule Group screen; see"Configuring Rules and Rule Groups for Purchasing" on page 52 for more information.

Cost Center - Select the cost center to populate the Cost Center field in the Purchase Request screen.

Job Function - Select the job function to populate the Job Function field in the Purchase Request screen.

**Recipient** - Select the support representative or customer to populate the Recipient field in the Purchase Request screen.

**Requested By** - Select the support representative or customer to populate the Requested By field in the Purchase Request screen.

**Bill To** - Select the support representative or customer to populate the Bill To field in the Purchase Request screen.

**Comments as Placeholder** - Select On to remove the configured text in the Comments field when the user clicks in the field in the Purchase Request screen.

**Comments** - Enter the text to populate the Comments field in the Purchase Request screen. If On is selected in the Comments as Placeholder field, the text will disappear when the user clicks in the field in the Purchase Request screen.

### Adding Line Items

Click the Add Line Item button to add line items to the purchase request template. After making an entry, use the E Save option to save it or the 🧊 Cancel option to undo your entry. Use the 🌌 Edit option to modify an entry.

**Asset Type** - Select the predefined asset type associated with the product to be included on the purchase request line item. Count tracking can be enabled for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit Price fields to be included on an Asset record if the type is selected. If a Product record with a count-enabled asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

**Vendor** - Select the vendor associated with the product to be included on the purchase request line item.

**Product** - Select the product to populate the Product field on the purchase request line item.

**Delivery (Days)** - Enter the number of days (after the purchase request creation date) to be used in the calculation of the date to display by default in the Delivery field on the purchase request line item.

**Expected (Days)** - Enter the number of days (after the purchase request creation date) to be used in the calculation of the date to display by default in the Delivery field on the purchase request line item.

**Quantity** - Enter the number to populate the Quantity field on the purchase request line item.

**Rate/Amount** - Enter the cost to be multiplied by the entry in the Quantity field; the result will be included in the Amount field for the purchase request line item.

**Taxes And Fees** - The taxes and fees associated with the product and vendor appear. Taxes and Fees records are set up via the Taxes and Fees screen (accessed via the Desktop Create menu).

Asset Create - Select this checkbox to create Asset records for the total quantity when all of the expected quantity for the line item is received. If a customer is the recipient on the order and the asset type uses the Owner field, those records will be populated with the customer. A link to the purchase order will be included in the History section of the Asset record and a link to the newly created Asset records will be included in the History section of the purchase order.

### **Adding Custom Fields**

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

Basics	Budget Code:	200
Custom Fields >	Expense Level:	

### Formatting the mySupport Purchase Request Submit Screen

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

Region	mySupport Header:					
Basics	Contact your supervisor if you have questions.					
Custom Fields						
Format >						
Attachments	mySupport Footer:					
	A followup email will be sent to you after submission.					

The header and footer will appear as follows:

Contact your supervisor if you have questions.
Save
Recipient: Steve Johnson
Bill to: Al Brown
Details Line Items Attachments
Line Items:
Desk Calendar Asset Type is Office Supplies   Vendor is Office Supply Depot   Quantity is 0 / 1   Rate is \$5.00   Amount is \$5.00 Comments are I need one for 2015
Paper Asset Type is Office Supplies   Vendor is Office Supply Depot   Quantity is 0 / 1   Rate is \$4.00   Amount is \$4.00 Comments are Please get heavyweight copy paper.
Total Amount is \$9.00
A followup email will be sent to you after submission.

# **Configuring Approval Cycles**

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

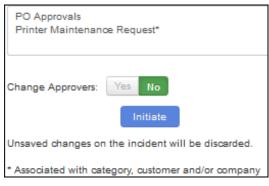
Desktop / Configuration / Options and Tools / Automate / Approval Cycles						
Approval Cycles		Search			×	
	G	reate Copy Delete Agent S	how Pending Deletion			
		Name 1	Allow Ad Hoc Use	Description		
		Application Access Approvals	Yes			
		Facilities Approvals	Yes			
		HR Approval	No			
		IT Approvals	Yes			
		Maintenance Approvals	Yes	Maintenance Approvals		
	Network Security Category Approva		Yes			
Over \$500 Approvals			Yes	Approval cycle for purchase requests over \$500		
	† 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.

Approvers can be support representatives or customers, and delegates can be set. See "Specifying Approvers" on page 49 for more information.

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

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



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

## Specifying a Verdict

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

This ticket is pending your approval.	Select an Action	
	Select an Action	
	Approve	
Customer 8675309 2	Decline Comment Only Cancel Approvals	Assignee Barry White ()
Steve Johnson	Number CCBC221897	Created 12/11/2012 11:11:07 AM
sj@example.com LBLSoft, Inc. 360-397-1004	Status Suspended	Followup 12/14/2012
Accounting Manager	Priority	Contract SJ Work Items 1

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

This incident is pending approval. To provide approval override:	Select an Action	•	for Barry White

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

The following can be selected:

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

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

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

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

### **Configuration Overview**

Do the following to configure approvals:

• Enable approval functionality via the Global Settings screen.

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

## Creating an Approval Cycle

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

Basics >	Name	Tier II Review
Default Statuses	Description	Review by Tier II reps
Approvers >		
Incident Notification Events		
Change Notification Events	Available for Ad Hoc Use	On Off
Purchase Notification Events >	Type of Approval	Serlal Concurrent

Name - Enter a name for the approval cycle.

**Description** - Enter a description of the approval cycle.

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

#### Type of Approval - Select:

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

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

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

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

#### Default Statuses

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

Basics	Incident Approval Statuses	
Default Statuses 🔉	Initial Status	Open 🔹 🕇 🖍
Approvers	Final Approval Status	Dispatached 🔻 🔸 🖍
Incident Notification Events	Final Decline Status	Closed
Change Notification Events	Cancellation Status	Suspended 💌 🕇 🖍
Purchase Notification Events	Change Approval Statuses	
Events	Initial Status	Pending Approval 💌 🕇 🖍
	Final Approval Status	Approved 🔹 🔸 🖍
	Final Decline Status	Declined 🔹 🛨 🖍
	Cancellation Status	Suspended 🔹 🕇 🖍
	Purchasing Approval Statuses	
	Initial Status	Pending Approval 🔹 🛨
	Final Approval Status	Open 🔹 🕇 🖍
	Final Decline Status	Open 🔻 🕇 🖍
	Cancellation Status	Closed 🔹 🕇 🖍

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

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

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

#### Specifying Approvers

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

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

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

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

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

Basics >	Use Customer's Approver		Yes No	
Default Statuses	Customer's Approver Approval Order			2
Approvers >		Default Approver:	Mary Smith	
Incident Notification Events 💙	Add	Remove		
Change Notification Events >				
		Order 🔺	Name	Туре
Purchase Notification Events >		1	Connor Flynn	Support Representative
		3	Nina Simone	Support Representative
		4	Barry White	Support Representative

#### Configuring Approval Notifications

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

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

Desktop / Configuration / Options and	Tools / Automate / Approval Cycles		
Basics			
Default Statuses	✓ Approval Requested		
Approvers			
Incident Notification Events	Customer Approver	iSupport Default 🗸 🔸	
Change Notification	Customer Approver Delegate	No Notification 🗸 🔸 🖉	
Events Purchase Notification	Support Representative Approver (via Email)	No Notification 💙 🕇 🥒	
Events	Support Representative Approver	No Notification 🗸 🕇 🖉	
	(via Alt Email)		
	Support Representative Approver Delegate	iSupport Default 🗸 🔸 🖋	
	Approval Request Approved		
	Approval Request Declined		
	Final Approval		
Final Decline			
	<ul> <li>Approval Comments Added</li> </ul>		
<ul> <li>Approvals Cancelled</li> </ul>			

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

# Configuring Rules and Rule Groups for Purchasing

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

- Change values in the Customer and Rep Bill To, Customer and Rep Recipient, Customer and Rep Requested By, and Status fields, as well as any custom fields; a template can also be set
- Send notification via email, Desktop, and SMS
- Initiate an approval cycle
- Execute a webhook for posting purchasing data to a web application

In order for a rule to be utilized, it must be included in a **rule group**. When a purchase request 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 purchase requests through customers, companies, and purchase templates. (If a customer profile does not have an associated rule group, the rule group associated with the customer's company will be used for the customer.) You can specify the order of precedence if multiple rule groups apply, and the rule group designated as default will be used if none are applicable. Note that rules in the associated rule group will not execute while a purchase request is pending approval.

A default purchase rule group will be included in iSupport on installation or upgrade. Upgrades will convert previously configured notifications into rules and rule groups. You can use the Purchasing Rule Groups screen to create rule groups and assign them to customers, companies, and templates. (You can also assign rule groups via those entry screens.) See "Creating Rule Groups" on page 62 for more information.

#### Rule Types

• On Purchase Save rules do not incorporate time frames; when a purchase request is saved, rules in the associated rule group are evaluated and if true, their actions are performed.

Name	Initiate Approval for Total Over 50	00	
Configure Conditions			
Rule type is	On Purchase Save		• 0
Hours of Operation:	None		• + /
Match AI 💌 of the following con	ditions:		+
Event	▼ Is ▼	Purchase Initially Saved 💌	+
Total Amount	▼ Greater Than ▼	\$500.00	+
Purchase Status	▼ Is ▼	Open 💌	+
Configure Actions			
Initiate Approvals 💌 Initial approv	val cycle: Maintenance Approvals	Configure 🛨	

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

•

•

Name	Purchase Request Pending Approval				
Configure Conditions					
Rule type is	Time-Based	θ			
Hours of Operation:	None	+ /			
Match All v of the following conditions:					
<u>Intervals</u> <u>Time</u> <u>Minutes/Hours/Daγ(s)</u> 1 8.00 Hours Notify - Email ▼ Author ▼ With	Default Notification  Approvals - Reminder - Rep	+ 0			

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:

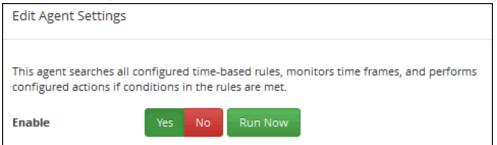
- **Time-Based** rules will clear all pending actions and if conditions are met again the time frame will restart.
- **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

**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 purchases, **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.

Desktop / Confi	guration / Options and Tools / Automate / Purc	hase Rules			
Basics	Name	Manager Approval Reminder			
Rule Groups	Rule Groups Configure Conditions				
	Rule type is	Time-Based: Important Dates	9		
	Hours of Operation:	None 🔻	F Z		
	Match All  of the following conditions: Select a Target  I	+ ··· s ▼ ▼ + - ···			
	Configure Time Frame Interval ar	nd Actions			
	1.00 Day(s) Before V Custom F	ield Manager Approval Date 🔻			
	Notify - Email   Approvers	▼ With Default Notificat ▼ Approvals - Reminder - Rep ▼ ♥ +	/ +		

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## **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 54 and "Configuring Actions" on page 56 for more information. See "Creating Time Frame Intervals for Time-Based Rules" on page 59 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 purchase request save. In the Select a Target dropdown, select what to evaluate.

Match AI 🔹 of the following cond	itions:	+
Select a Target	▼ Is ▼ ▼	+
Select a Target Cost Center Custom Field Customer Bill to Customer Bill to Company Customer Recipient Customer Recipient Company Customer Requested by Customer Requested by Customer Requested by Company Email - Auto-Submitted Email - Body Email - CC		
Email - From Email - Subject Email - To Email Account Event Job Function Modified By mySupport Options Purchase Status Purchase Status Purchase Status Type Rep Bill to Rep Recipient Rep Requested by Source mySupport Portal Total Amount Within Business Hours		

In the next dropdown, select the comparison method.

Match AI 💌 of the following conditions	:				+ "	·
Event 💌	Is	-	Purchase Initially Saved	•	+ -	• •••
	Is					
Configure Actions	Is Not					

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.

Match All V of the following condition:	5:		
Event 🗸	Is	~	Customer Work History Added to Purchase 🗸
Configure Actions			Customer Work History Added to Purchase Purchase All Items Marked as Received Purchase Correspondence Sent Purchase Edited During Approvals Purchase Initially Saved by Customer Purchase Initially Saved by Rep
Select an Action Type 💙	+		Purchase Items Marked as Received Purchase Status Change Purchase Updated via Email Work History Added to Purchase

Note: If a rule contains conditions with the Customer Work History Added or Work History Added to Purchase events, the rule will be triggered immediately when the event occurs (even if the purchase request 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 purchase request will not be saved until the support representative saves the purchase request.

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.

Configure Actions	5
Change	7
Change Execute Slack Webhook Execute Webhook Initiate Approvals Notify - Desktop Notify - Email Notify - SMS	

You can:

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

Change	-	Purchase Status	-	То	Pending Approval (Open)	+
		Custom Field Customer Bill to Customer Recipient Customer Requested by				
		Purchase Status Purchase Template Rep Bill to Rep Recipient Rep Requested by				

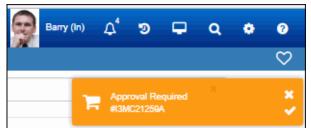
**Execute a configured webhook** for posting Purchase data to a web application. See "Configuring Webhooks" on page 74 for more information.

Configure Ac	tions	;	
Execute Webhook	•	Purchase Webhook	+

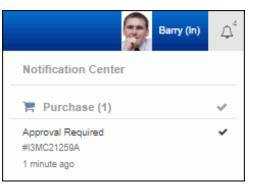
- Send a notification via Desktop notification, email, or SMS.
- Desktop notification: To display an entry in the one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.

Configure Act	tions			
Notify - Desktop 🔻	Select Recipients	V Select Support Reps V	Select Support Groups 🔻	Approval Required
	Approvers 🗙	White, Barry X		

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.

Configure Action	ons							
Notify - Email	Author	- Wi	/ith Default Notification	•	Approvals - Reminder - Rep	- 0 -	+ 🖊	+
	Approvers Author							
	Withon Bill To Dustomer Submitting Update Email Sender Previous Approvers for Current Cycle Recipient Requested By Selected Customer Selected Customer Gelected Customer Group Selected Support Rep Selected Support Rep Selected Support Rep Selected Support Rep Group Vendor					Cancel	Print	Save

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. You can select ③ Show Notification to display the contents of the selected notification, and use the 🛨 Create New and 🗹 View/Edit options to access the Custom Notification screen; see "Customizing and Viewing Event Notification Content" on page 66 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 integration is configured, the number in the Mobile field. If sending to a customer, the message will be sent to the following in their

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 69 for more information on Twilio integration.

Configure Act	tions					
Notify - SMS	Ŧ					
Customer		• With	Default Notification	•	Closure - Cust	v 0 + 🖊

Initiate approvals by selecting Initiate Approvals and clicking the Configure link.

Configure Actio	ns	
Initiate Approvals	<ul> <li>Configure</li> </ul>	+

iSupport's Approval feature requires a purchase request to be approved by designated approvers before it can be closed. The rule in effect can initiate one or more approval cycles. Approval cycles can be associated with customers, companies, and purchase request templates.

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

Approval Action Configuration					
Specify the approval cycles to apply when the Rule is in effect. If any approval cycle results in a Decline verdict, no further cycles will apply.					
Initial Approval Cycle	Maintenance Approvals				
Associated Approval Cycles					
An approval cycle may be associated with a cust customer recipient company profile. If there is r selected initial approval cycle results in an appro	no initial cycle (selected above) or a				
First associated cycle	Cycle associated with customer re				
If the first associated cycle is approved, apply this second cycle	None				
If the second assoclated cycle is approved, apply this third cycle	None				
If no associated cycle applies, use this approval cycle	None				
Final Approval Cycle	None				

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

**First Associated Cycle** - Select the approval cycle to apply if there is no initial approval cycle or the cycle specified in the Initial Approval Cycle field results in an approval. You can select Cycle Associated With Customer Recipient, Cycle Associated With Customer Recipient Company, or Cycle Associated with Template.

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

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

If No Associated Cycle Applies, Use This Approval Cycle - Select the predefined approval cycle to apply if there are no approval cycles associated with the customer, customer's company, or template.

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

#### Creating Time Frame Intervals for Time-Based Rules

#### Time-Based and Time-Based: Cumulative Rules

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

Name	Purchase Request Pending Approval				
Configure Conditions					
Rule type is	Time-Based	θ			
Hours of Operation:	None	+ /			
Match All  of the following conditions: Purchase Status Is Configure Time Frame Intervals a					
Intervals Time Minutes/Hours/Day(s)		+ 0			
Notify - Email 💌 Author 💌 With	Default Notification Approvals - Reminder - Rep 💌 🔍 🕂 🖍	+ - ©			

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) field to specify the amount and unit of time (in minutes, hours, or days) in the time frame. Use the dropdowns in the indented actions line to specify the actions to perform if conditions are met for that interval time frame. In the example above, the purchase request will be monitored for eight hours after initial save; if the status remains at Pending Approval (Open) for the entire eight hours, the Approvals - Reminder - Rep notification will be sent to the author of the purchase request.

#### Time-Based: Important Dates Rules

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

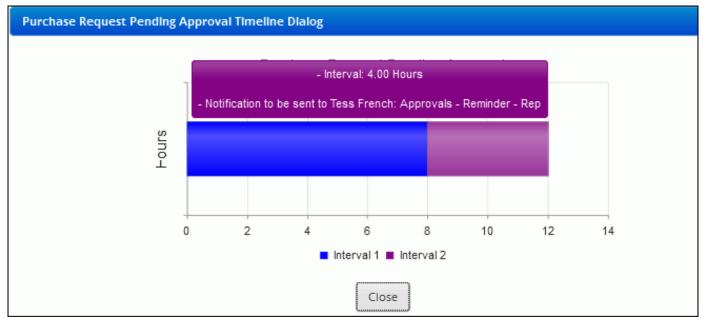
#### Configuring Multiple Time Frame Intervals

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  $\checkmark$  Move Down and  $\uparrow$  Move Up options will appear for changing the order in which the interval time frames will be evaluated. In the example below, the purchase request will be monitored for an eight hour time frame and if the status remains at Pending Approval (Open) for the entire eight hours the Approvals -Reminder - Rep notification will be sent to the author. The purchase request will then be monitored for an additional four hour time frame. If the status remains at Pending Approval (Open) for the entire four hours, the Approvals -Reminder - Rep notification will be sent to Tess French.

Name	Purchase Request Pending Approval					
Configure Conditions						
Rule type is	Time-Based	• 0				
Hours of Operation:	None	• + /				
Match A of the following conditions: Purchase Status Is Configure Time Frame Intervals and Ac	Pending Approval (Open)					
Intervals Time Minutes/Hours/Day(s)						
1 8.00 Hours	•	+ - © +				
Notify  Author  With Default	Notification 💌 Approvals - Reminder - Rep 🔽 🔍 🕂 🖍	+ - ©				
1 4.00 Hours	•	+ - © †				
Notify 💌 Selected Support Rep 💌 French, Tess	▼ With Default Notification ▼ Approvals - Reminder - Rep ▼ ♥ + ✓	+ - 0				

#### 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.

Rule Name:	Purchase Request Pending Approval
Target Entity:	Purchase
Type:	Time-Based
Cumulative:	No
Conditions:	Match all of the following conditions: If Purchase Status is Pending Approval (Open)
Actions:	Repeat 1 time(s) every 8.00 hours Notification to be sent to Author: Approvals - Reminder - Rep Repeat 1 time(s) every 4.00 hours Notification to be sent to Tess French: Approvals - Reminder - Rep
Rule Groups:	Default Purchase Rules
	Print Close Window

### 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 groups and click OK. The rule group displays along with its position as shown below:

Basics	Ad	Add Remove								
Rule Groups		Name 🔺	Position							
		Default Purchase Rules	1							

All rules in the rule group associated with a purchase request/order are evaluated when it 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 Purchasing Rule Groups screen to create a rule group that can be used as default and/or applied to customers, companies, and purchase request templates.

Rule Groups	Search	×		
Asset	Create Copy Delete Order of Precedence Rules			
Change	Name 🔺	Default		
Email	Default Purchase Rule Group Default			
Incident	Executie Management Purchase Rules			
Knowledge Entry				
Opportunity				
Problem				
Purchase >				

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

Desktop / Configuration / Op	tions and Tools / Automate / Purcha	se Rule Groups		
Basics >	Name	Executie Management Purchase Rules		
Customers	This is the default Purchase Rule Group	On Off		
Companies	Hale of oup			
Templates	Hours of Operation:	24/7 🔻 🕇 🖍		
	Add Rules to This Rul	le Group		
	On Save Time-Based			
	Add Remove Create			
	Name	Position 🔺		
	Notify Recipient if Approval	Required 1		

**Name** - Enter a name for the rule group; this name will appear in the Purchase Request screen when the rule group is in effect for a purchase request.

This is the Default Purchase Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the customer, company, or template on a purchase request.

More than one rule group may apply to a purchase request; if a purchase request template selected for a purchase request has a rule group, it will override any other rule group that may apply.

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

Add	Add Rules to This Rule Group					
Or	Save Time-Based					
Add	Add Remove Create					
	Name	Position 🔺				
	Notify Recipient if Approval Required					
Desktop Notify Approval Required						

#### Assigning a Rule Group

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

Basi	ics	4	Add	)							
Cust	tomers >			Last Name 🔺	First Name	Phone	Location	Company	Department	Email	Customer ID
Com	npanies	5	<b>J</b>	Jackson	John	360-397-1000		LBLSoft, Inc.		example@example.local	
Tem	plates										

#### 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.

Rule Group Name:	Executive Management Purchase Rules
Target Entity:	Purchase
Default:	No
Hours of Operation:	24/7
Customers:	John Jackson
Companies:	
Categories:	
Templates:	
Hierarchy Templates:	
On Save Rules:	
Rule Name:	Notify Recipient if Approval Required
Target Entity:	Purchase
Type:	On Save
Conditions:	Match all of the following conditions: If Purchase Status is Pending Approval (Open)
Actions:	Notification to be sent to Recipient: Initial Save - Approval Initiated - Cust
Rule Groups:	Executive Management Purchase Rules
Rule Name:	Initiate Approval for Total Over 500
Target Entity:	Purchase
Type:	On Save
Conditions:	Match all of the following conditions: If Event is Initially Saved and If Total Amount greater than \$500.00 and If Purchase Status is Open
Actions:	Initial approval cycle: Maintenance Approvals
Rule Groups:	Default Purchase Rules Executive Management Purchase Rules
Time-Based Rules:	
	Print Close Window

## Setting the Rule Group Order of Precedence

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

Rule Groups	Search					
Asset	Create Copy Delete Order of Precedence Rules					
Change	Purchase Order of Precedence ×	Default				
Email		Default				
Incident						
Knowledge Entry	Customer Recipient					
Opportunity	Customer Recipient Company					
Problem						
Purchase >	Save Cancel					

# **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.

Custom	Default				
Basics	Incident Save		Cop	ny	
	Incident Save			Name 🔺	Subject
···· Incident Route			Initial Save (by Support	[iSupport] New Incident Ticket	
- Incider	nt Closure			Representative) - Cust	Created
····· Email-Submitted Incident Creation ····· Incident Closure Exceeded			Initial Save (by Support Representative) - Rep	[iSupport] New Ticket Created for <customer name=""></customer>	

### 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 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.

Desktop / Configuration / Options	and Tools / Customize / Custom Notifications				
Name	Initial Save (by Support Representative) - Rep				
Delivery Priority	Low Normal High				
Include Attachment(s) from Incident	On Off				
Subject	New Incident Created for <customer name=""></customer>				
SMS Text	New Incident for <customer name=""></customer>				
	Subject used if unspecified				
Attachments	Attach a file				
Design Template	None				
Notification Message: Include Field					
😻 🖶 🛔 🐰 🖻 🍤 - Cl -	Β Ζ Ц 🗒 - 🖏 🖑 🦉 Ω - Φ -				
	📭 🚎 🛓 🗄 🦷 MS Sans Ser 🛛 2 🔹				
This <priority> priority incident ti</priority>	cket was created for <customer name="">.</customer>				
Customer Details Name: <customer name=""></customer>					

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 68 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 69 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).

🗑 Select Field to Include	—	$\times$
Current Date		
Rep URL to Read Online		1.1
mySupport URL to Read Online		
Incident		
URL to Desktop Incident		
URL to Mobile Desktop Incident		
URL to mySupport Incident		
Asset Details		
Custom Fields		
Custom Fields List		
Age Group		
Server OS		
Site Visit Required		
Department Code		
Date		-

**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.

Title	Logo Footer
Body:	
****	)• C* - B / Ü ĝ • Ŝ Ŝ Ω • Ø • 🖬 🖬 🖬 ≡ ≡ 📰 🕅 ¶
'Times New R ▼ 3 ▼	Normal • A •
<correspondence body=""></correspondence>	
🗑 ISUPPORT	
🖊 Design 🚯 HTML	S Preview

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.

Subject: C	ontact Information Update Request
Hello,	
Please send n	ne your updated contact infomation. Here is what we have in our system:
Steve Johnson	
sj@example.l	ocal
360-397-1004	•
Thank you,	
Barry White	
Support Repre	esentative
360-397-1000	
bw@example	local
<b>SUPPOR</b>	T

## **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.

View:	🗹 Incident 🕑 Cl	hange 🗹 Problem 🗹 Purchase	Service Contract	Configuration Item
Del	ete Selected Notificat	Clear All Notifications		
	Туре	Event	Date Created 👻	Number
	Purchase	Initial Purchase Request Save	2/2/2019 2:32:49 P	PM G22F435A17
	Purchase	Initial Purchase Request Save	2/1/2019 11:25:28	AM G21C3639A7
	Service Contract	Initial Save	1/26/2019 10:31:17	7 AM G1RB351683

## **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 Mobile field; if twilio is not configured, the Mobile field; if Twilio is not configured, 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.

Desktop / Configurati	on / Options and Tools / Integrate / Twilio® Integrations		
Use this screen to integrate with Twilio for sending iSupport notifications via SMS (Short Message Services) messaging. Sign up at Twilio.com. In this screen enter a name for the integration, the number for an SMS-enabled phone from which notifications can be sent, and the values from your Twilio.com account dashboard in Account SID and Auth Token fields.			
Name	Twilio1		
Phone Number	20000000000		
Account SID	200000000000000000000000000000000000000		
Auth Token	200000000000000000000000000000000000000		
Default	Yes No		

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.

# 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.

Desktop / Configuration /	Options and Tools / Administer /	Archiving and Database Mai	ntenance			
Basics >	Database Mainte	enance Agent				
Change	This agent maintains data resulting from incomplete saves, deleted records, etc.					
Correspondence	Time Agent Should Run I	Each Day	2:30 AM	V Run Now		
Incident	Days of Week		Sunday	*		
Problem			Monday Tuesday			
Purchase			Wednesday Thursday			
			Friday Saturday	<b>.</b>		
	Archive Agent					
	This agent moves closed wo	rk items and sent correspon	dence documents that mee	t archive criteria to an arc	hive database.	
	Run Now					
	Sunday Enabled	Yes No				
	Start Time	12:00 AM	Max Duration	4	Hour(s)	
	Monday Enabled	Yes No				
	Tuesday Enabled	Yes No				
	Start Time	12:00 AM 💙	Max Duration	4	Hour(s)	
	Wednesday Enabled	Yes No				
	Thursday Enabled	Yes No				
	Start Time	12:00 AM 🗸	Max Duration	4	Hour(s)	
	Friday Enabled	Yes No				
	Saturday Enabled	Yes No				
	Start Time	12:00 AM 🗸 🗸	Max Duration	4	Hour(s)	
	Chat Log Purge		90		days	

## 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).

Desktop / Configuration / C	ptions and Tools / Administer / Archiving and Database Maintenand	œ
Basics	Incident	
Change	Archive Enabled	Yes No
Correspondence	Elapsed amount of time before a closed incident is moved from the production database to the	120 Days 🗸
Incident >	cSupport_Archive database	
Problem	Statuses to Archive	Closed - FAO
Purchase		Closed - PAQ
		Ψ
	Purge Enabled	Yes No
	Elapsed amount of time after the closed date before archived incidents are purged from the cSupport_Archive database	1 Years ¥

**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 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.

Desktop / Configuration / Options and Tools / Integrate / Incident Webhooks				
Name	Webhook			
URL	http://xxxxxxxxxx/webhookexamples/webhook			
Content Type	x-www-form-unlencoded JSON			
Parameters & Payload Example				
Basics	iSupport Field Parameter Name	{ "Number":"Number",		
··· Identifier ··· Number	Number Number	"Identifier":"Identifier" }		
··· Status Status Identifier	<b>Identifier</b> Identifier			
··· Priority				

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.

Desktop / Configur	ration / Options and Tools / Automat	te / Incident Rules		· · · · · · · · · · · · · · · · · · ·	
Basics	Name	Webhook Rule			
Rule Groups	Configure Condit	tions			
	Rule type is	Time-Based		♥ 0	
	Hours of Operation:	None		¥ + /	
	Match All 🗸 of the fol	lowing conditions:	+		
	Custom Field	✓ Current Project Is	Set Value: Beta	+	
Configure Time Frame Intervals and Actions       Intervals     Time       Minutes/Hours/Day(s)					
	1 0.50	Hours	+ 0		
	Execute Webhook	✓ Webhook ✓	+ - ©		

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