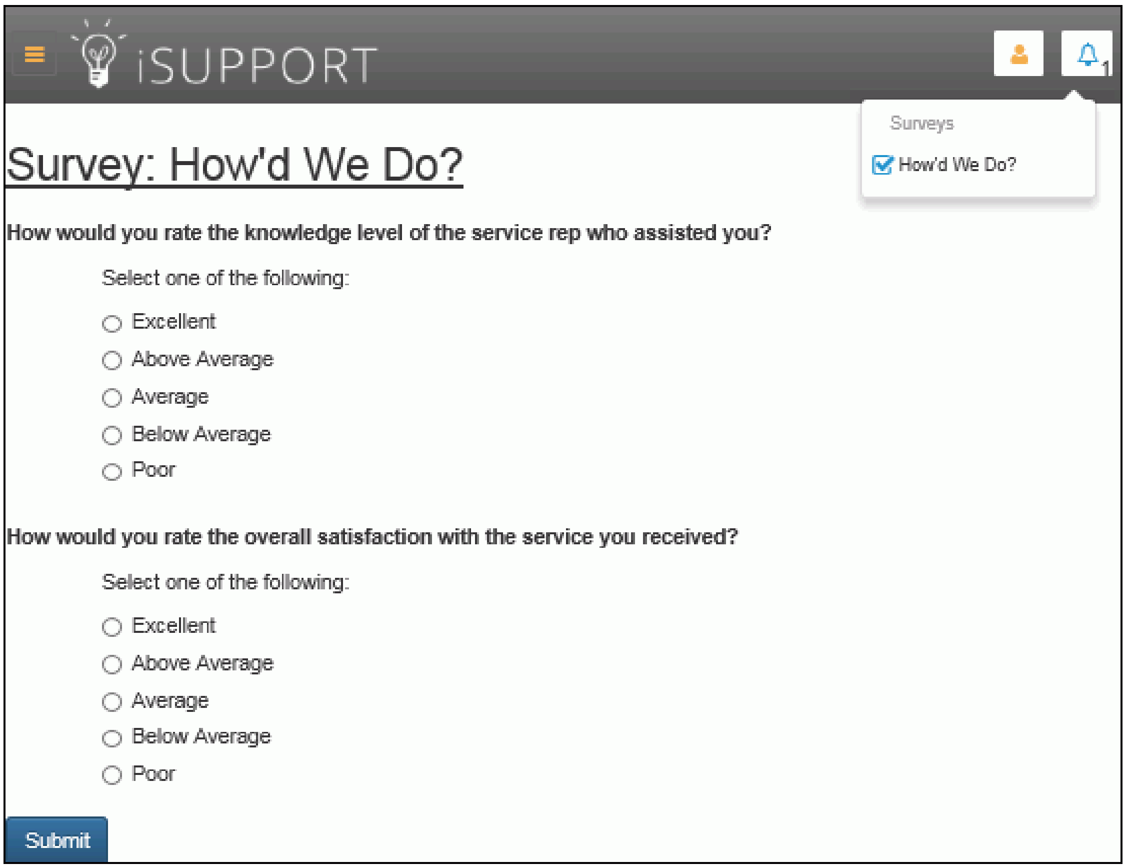
Configuring iSupport® Survey Functionality

Overview

iSupport Survey functionality enables you to define and send questionnaires. Survey questions can utilize checkboxes, radio buttons, and date/time and text fields. You can send surveys from the Incident, Change, or Customer Profile screen, or automatically on a scheduled interval. Surveys are shown on mySupport; the notification icon in the upper right corner indicates when the portal user has pending surveys (manually or automatically distributed, or available to all mySupport portal users).



To send a survey:

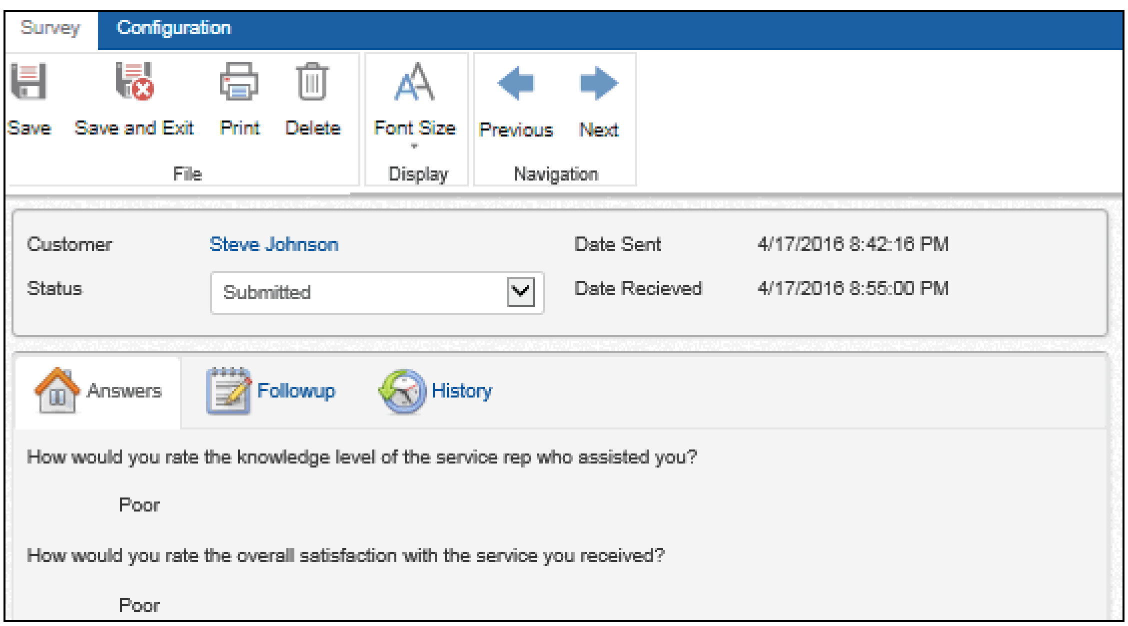
- Select New | Survey in the Incident, Change, and Customer Profile screens.

- Select multiple incidents, changes, customers, or customers in a group in a view on the Desktop and then select Send Survey on the view component Action menu.

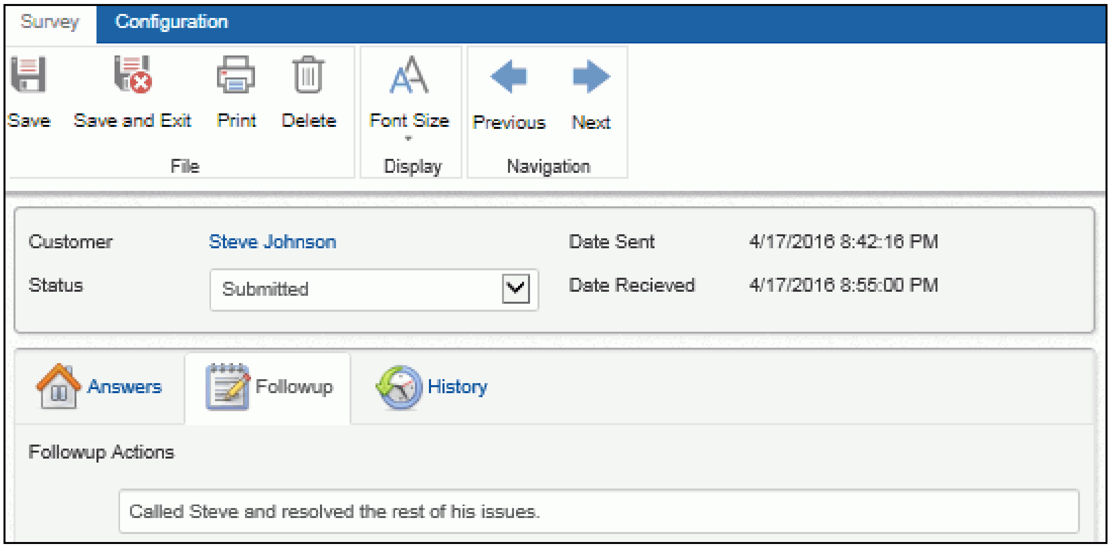
- Configure surveys to be sent on a categorization basis, closed incident /change count basis (via the Survey Interval field), and a customer/day count basis (via the Interval Between Surveys to Same Customer field). If one of these fields is left blank or a closed change does not have an assigned customer, the field is not evaluated.

  For each active survey definition, the Survey agent will first check the send conditions; if the send conditions of the closed incident or change are not met, the process stops. If the send conditions are met, the interval count is checked; if not reached, the process stops for the incident or change. If the count has been reached, the customer/day count is checked. If not reached, the survey is sent.

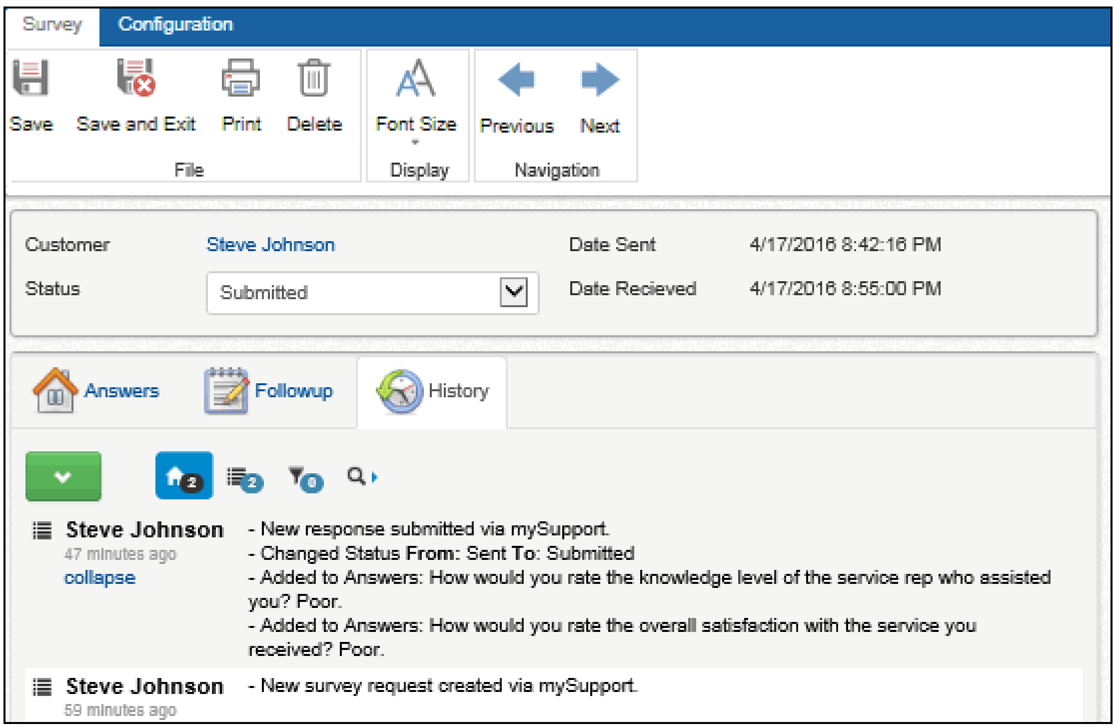
Support representatives with sufficient permissions can open surveys via Desktop views and complete followup questions, and change the status to Closed.



Support representatives can complete followup questions via the Followup tab.



The History tab documents all survey actions.



Configuration Overview

Basic Configuration

- Enable Survey functionality and set basic options via Feature Basics. In that screen you can:
  - Create survey questions which can utilize checkboxes, radio buttons, and date/time and text fields. You can include data values from incident/change fields at the top or bottom of the survey. See “Creating Survey Questions” on page 5.
  - Create rep followup questions. See “Creating Rep Followup Questions” on page 6.
  - Set up a survey definition consisting of distribution options and notification, expiration information, and survey questions. Questions can be used in multiple survey definitions, and you can configure responses to be required for a question. You can also set a survey to Inactive. You can include data values from incident/

change fields at the top or bottom of the survey. (Note that the word "Survey:" precedes the title in the generated survey; you can use the Resource Editor to change/remove it if desired.)

- If distributing surveys on an automatic basis based on incident/change categorization and/or interval count, enable the Survey agent. (To stop automatic distribution of all active surveys, disable the Survey agent. Note that surveys with an active definition will still be sent if the Survey agent is re-enabled.) See “Defining a Survey” on page 8.

Using Workflow Features

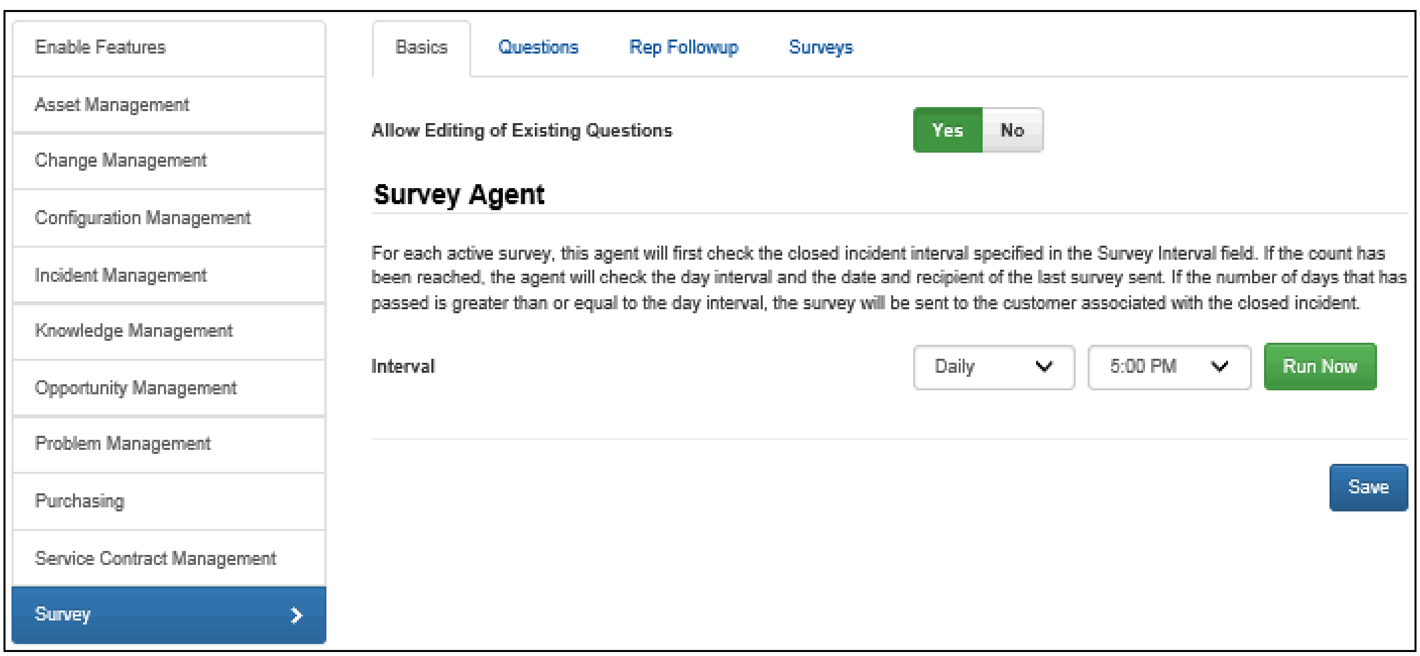
- You can use survey rules to send Desktop and email notifications when specified conditions based on the survey definition, event (sent, initially submitted, or closed), survey question values, or status (sent, submitted, or closed) are met. For example, you can configure a rule to display a notification on the Desktop when a survey is submitted by a customer. See “Configuring Rules and Rule Groups for Surveys” on page 16. You can use or copy and modify iSupport's default notifications, or you can create new custom notifications.
- You can use survey rules to change the status to Closed or set a value for a followup question. See “Configuring Rules and Rule Groups for Surveys” on page 16.
- You can configure roles/permissions for support reps and rep groups using Survey functionality via the Support Representatives screen. See the online help for more information.

Creating Survey Definitions

Use the subtabs off of the Survey tab in the Feature Basics screen to define the questions to be included in the survey, rep followup questions for support representatives to complete when viewing a survey, and configure the survey notification, distribution options, expiration information, and content for a survey.

Completing Basics

Use the Basics tab to enable support representatives to edit survey questions currently in use and, if sending surveys based on categorization or on an interval basis, schedule the Survey agent.

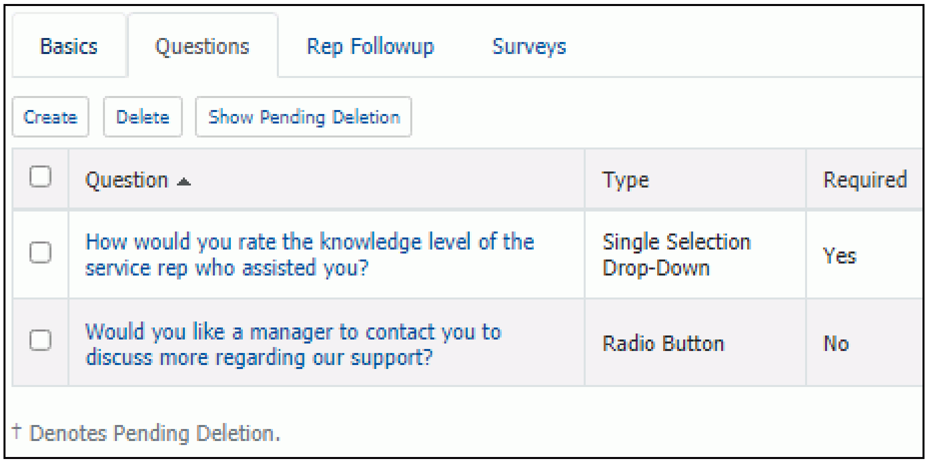


Allow Editing of Existing Questions - Select Yes to allow survey questions that are currently in use by a survey to be edited. This affects survey definitions with a future expiration date and the Active checkbox enabled.

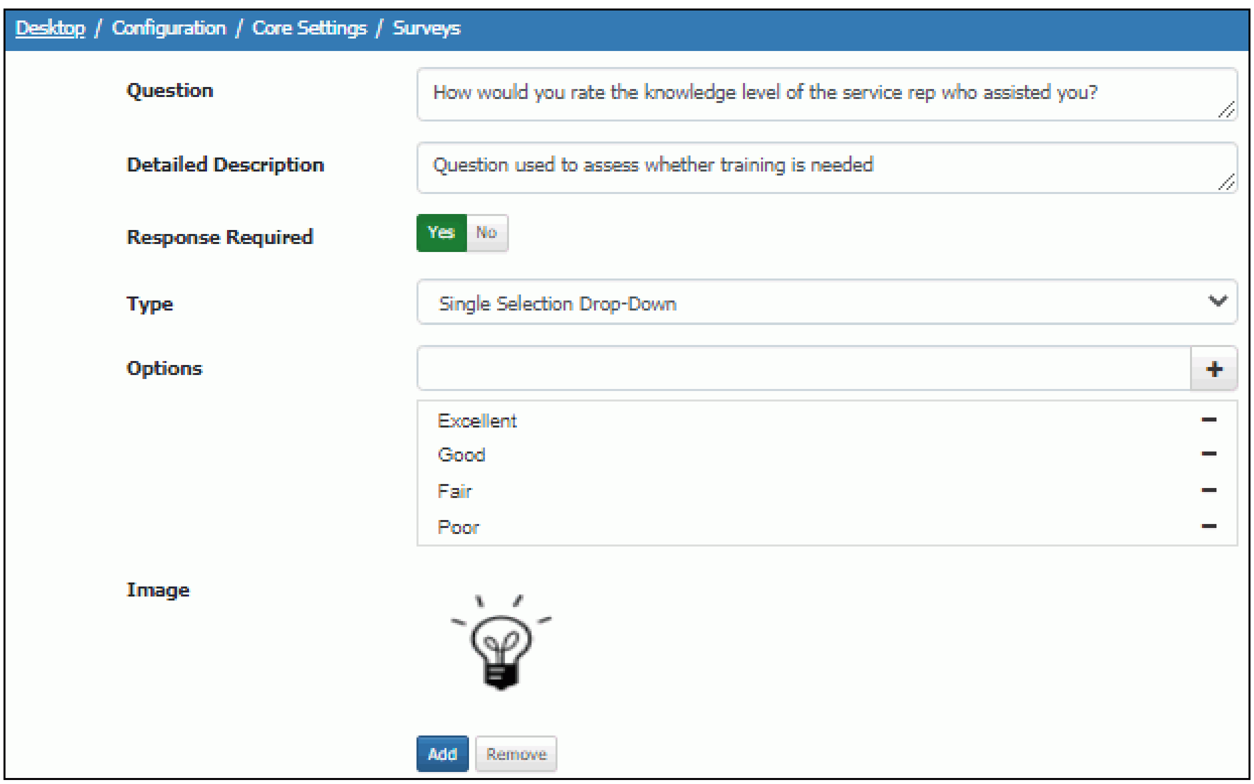
Survey Agent - For each active survey**,** the Survey agent will first check the closed incident/change interval specified in the Survey Interval field. If the count has been reached, the agent will check the day interval and the date and recipient of the last survey sent. If the number of days that has passed is greater than or equal to the day interval, the survey will be sent to the customer associated with the closed incident/change. Select the number of minutes in the interval for the survey agent to check survey definitions, or select Daily to run the agent every day at a specified start time.

Creating Survey Questions

Use the Questions tab in the Surveys screen to set up survey questions that can be used in one or more surveys.



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.



Question - Enter the survey question. You can enter up to 255 characters. If applicable, you can use HTML tags for formatting.

Detailed Description - Enter specific information regarding the survey question. This text will appear below the survey question in the survey so that you can reference the response field.

You can enter "Select one of the following" in this field if you will use a single-selection drop-down response type. You can enter up to 255 characters. If applicable, you can use HTML tags for formatting.

Response Required - Select Yes to require the survey question to be answered before the survey can be submitted by the customer. If this options is selected, a red asterisk will precede the question.

The following note is included at the top of the survey: "Questions marked with an asterisk (*) require responses."

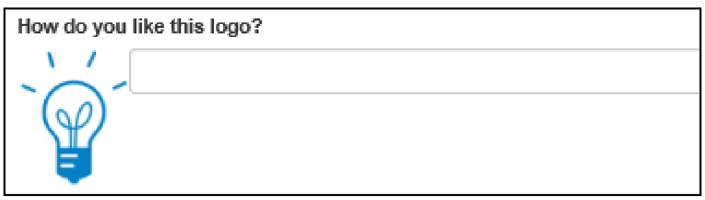
Type - Select the type of response field for the question:

- Radio button (allows only one selection)
- Check box (allows multiple selections)
- Text field
- Text area
- Multiple selection list box
- Single selection drop-down
- Date Time (MM/DD/YY; a time can be entered in the field)
- Section header (formats the question text in bold and inserts a line of blank space; enables you to introduce the next set of questions).

Options - This field displays when creating a radio button, checkbox, multiple selection list box, or single selection drop-down field; enter a list of answers for the customer to choose from when completing this field. For each entry, enter the option and then select + Add.

Max Columns - Enter the maximum number of columns in which to display answer options.

Image - To insert an image in a 100 x 100 pixel size to the left of the survey question, select the Add link. Use the Browse button to select the image, and then select the Load Image link.



If you select the image on the survey, it will appear full-size in a separate window.

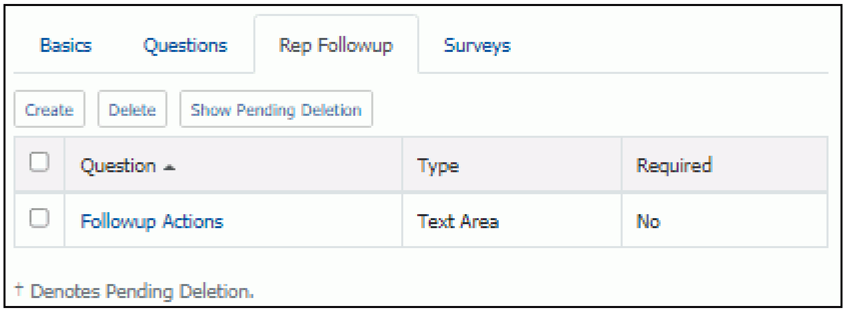
To create some blank space in your survey, you can use the Section Header question type with blank spaces for the question text.

Note that once a customer submits a survey, the customer can view the survey but the Submit button will not appear on it.

Creating Rep Followup Questions

Select Create on the Rep Followup tab to enter fields (questions) that can be completed by support representatives viewing surveys. 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.



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.

Detailed Description - Enter specific information regarding the survey question. This text will appear below the survey question in the survey so that you can reference the response field. For example, you can enter "Select one of the following" in this field if you will use a single-selection drop-down response type. You can enter up to 255 characters. If applicable, you can use HTML tags for formatting.

Response Required - Select Yes to require the survey question to be answered before the survey can be submitted by the customer. If this options is selected, a red asterisk will precede the question.

The following note is included at the top of the survey: "Questions marked with an asterisk (*) require responses."

Type - Select the type of response field for the question:

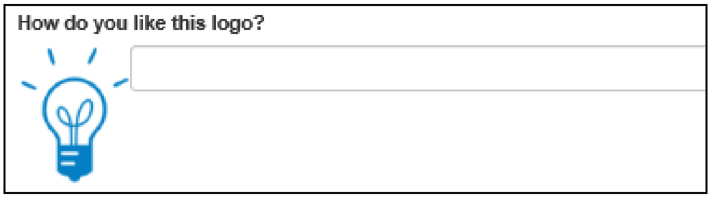
- Radio button (allows only one selection)
- Check box (allows multiple selections)
- Text field
- Text area
- Multiple selection list box
- Single selection drop-down
- Date Time (MM/DD/YY; a time can be entered in the field)
- Section header (formats the question text in bold and inserts a line of blank space; enables you to introduce the next set of questions).

Note: All survey response fields are designed to hold 2048 characters. If a user pastes a response exceeding that amount, the excess will be truncated. iSupport restricts users from typing more than 1024 characters into text fields.

Options - This field displays when creating a radio button, checkbox, multiple selection list box, or single selection drop-down field; enter a list of answers for the customer to choose from when completing this field. For each entry, enter the option and then select + Add.

Max Columns - Enter the maximum number of columns in which to display answer options.

Image - To insert an image in a 100 x 100 pixel size to the left of the survey question, select the Add link. Use the Browse button to select the image, and then select the Load Image link.

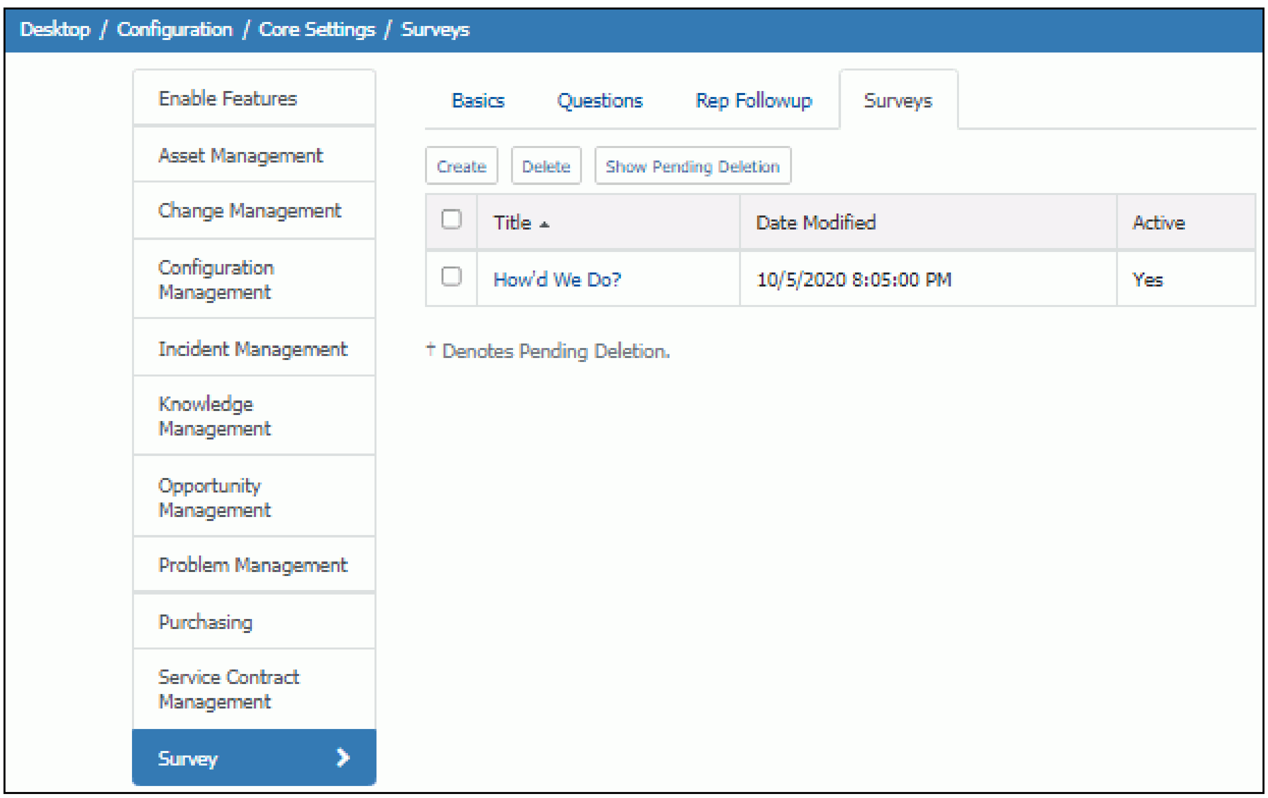


If you select the image on the survey, it will appear full-size in a separate window.

To create some blank space in your survey, you can use the Section Header question type with blank spaces for the question text.

Defining a Survey

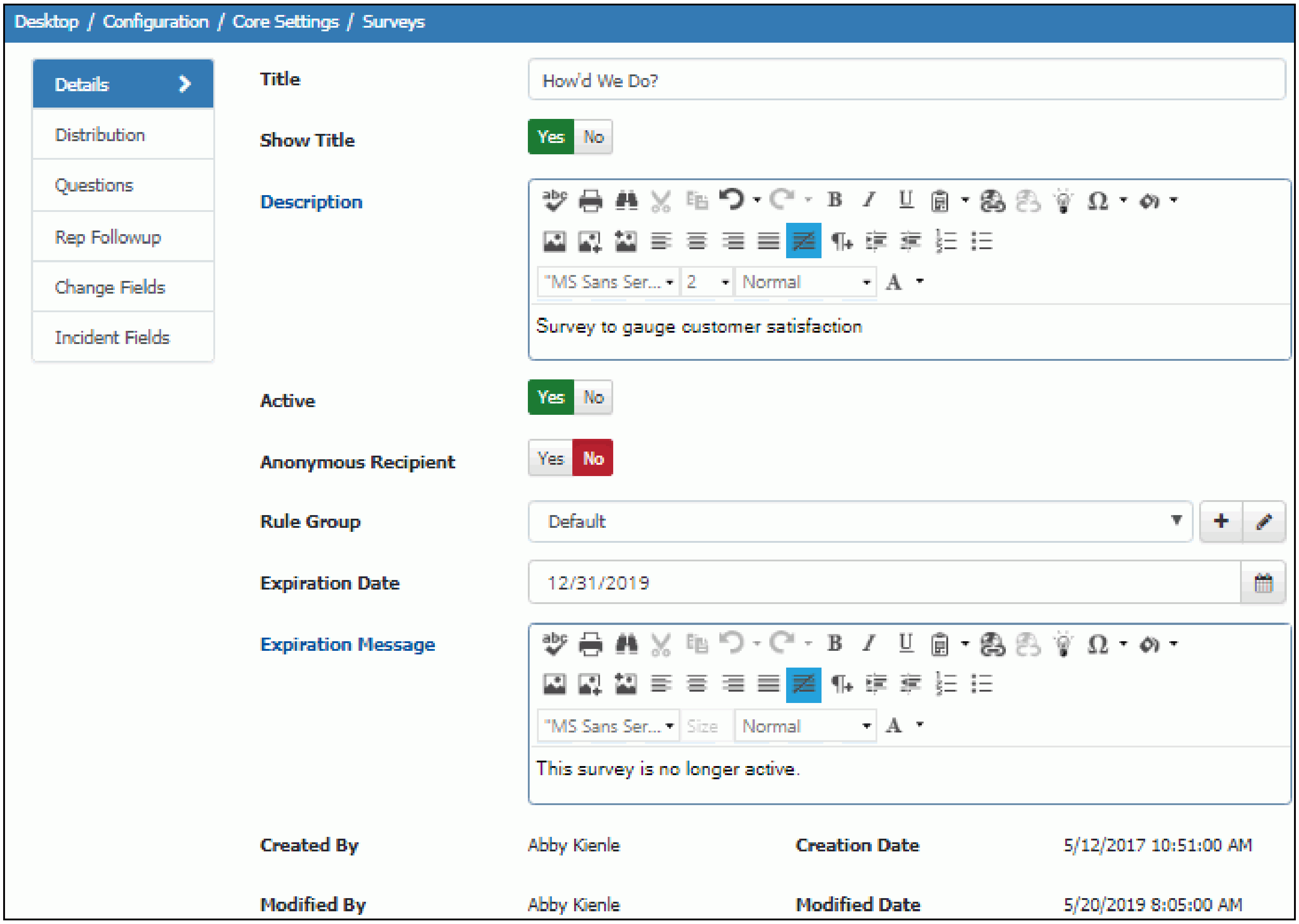
On the Surveys tab, select the Create link to set up the survey.



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.

Completing Survey Details

The following dialog appears for specifying availability and entering descriptive and expiration information:



Title - Enter the title that describes the survey. This name will appear for selection when support representatives try to send a survey.

Show Title - Select Yes to include the title at the top of the survey. The text "Survey:" will precede the title; use the Resource Editor to change it.

Description - Enter descriptive information regarding the survey. You can select the Description link to display a larger window.

Active - Select this checkbox to enable the survey to be sent automatically by the Survey agent and manually via the Desktop and the Incident, Customer Profile, and Change screens.

Anonymous Recipient - This field appears if the Available to mySupport field on the Distribution tab is set to No. Select Yes to change the recipients of this survey to "Anonymous" in views of survey responses on the Desktop and Report Viewer.

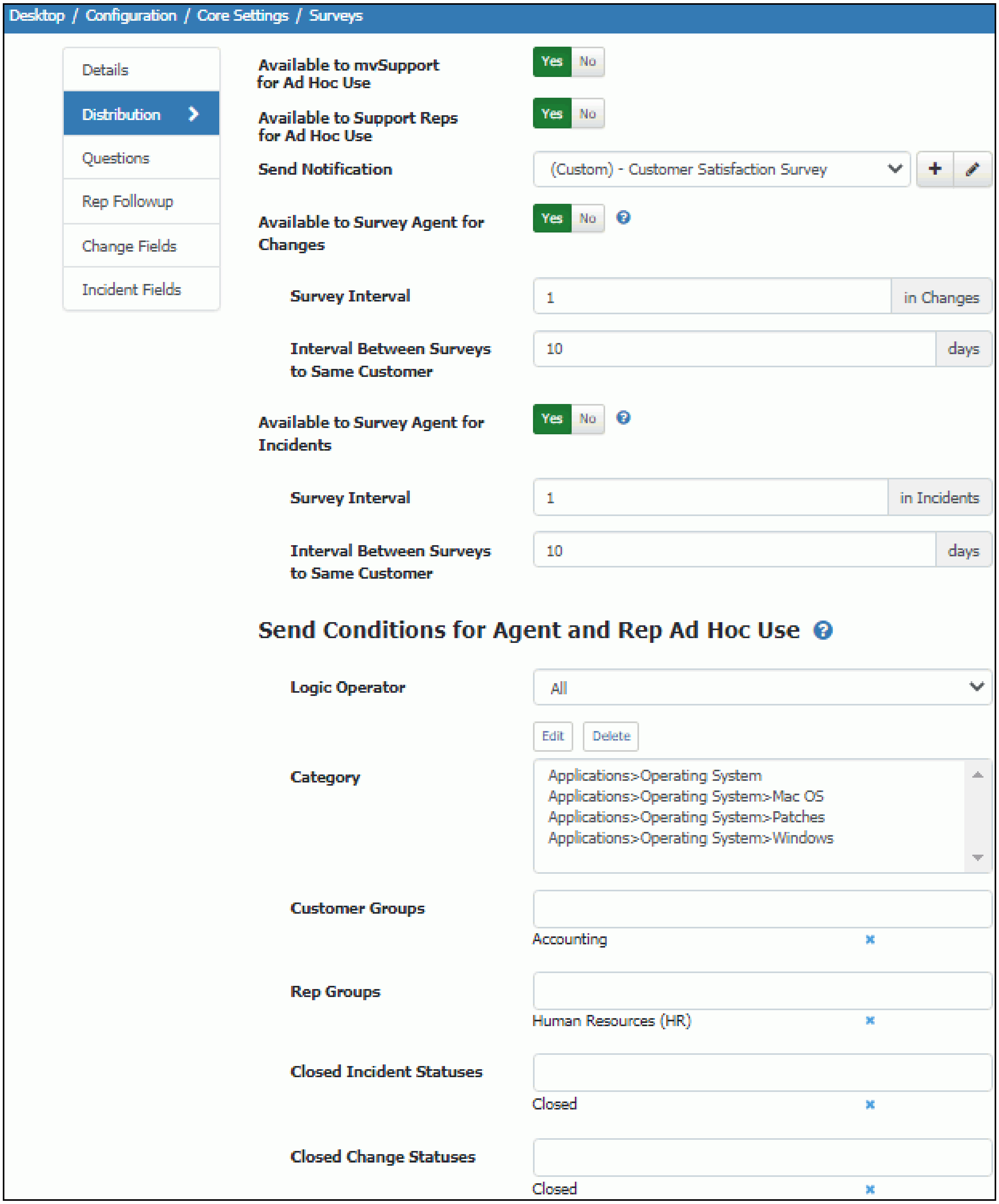
Rule Group - Select a rule group to associate with the survey definition. When a survey request is saved (via any change to it including when it is sent or made available to mySupport, submitted via mySupport, or opened via a Desktop view, modified, and saved), all rules in the associated rule group are evaluated. If a rule's conditions are met, its actions are performed. See "Configuring Rules and Rule Groups for Surveys" on page 16 for more information.

Expiration Date - Enter the date on which responses will no longer be accepted. On this date, when someone attempts to respond via the URL, an expiration message will appear. The survey will not expire if no date is entered at this field.

Expiration Message - Enter the message to appear when a customer responds to the survey on or after the date in the Expiration Date field.

Configuring Survey Distribution

Use the Distribution tab to set options for how the survey will be available to customers.



Available to mySupport for Ad Hoc Use - Select Yes to make the survey available to all customers accessing mySupport portals (the Notification icon in the upper right corner will increment for all customers). If No is selected in this field, the Anonymous Recipient field will appear on the Details tab; selecting Yes in that field will change the recipients of this survey to "Anonymous" in views of survey responses on the Desktop and Report Viewer.

Available to Support Reps for Ad Hoc Use - Select Yes to make the survey available as a selection from the Desktop and Incident and Customer Profile screens. Note: the survey will not appear if it is set up to be available only when a specified categorization is selected for an incident. If the send conditions are met, the interval count is checked; if not reached, the process stops for the change. If the count has been reached, the customer/day count is checked. If not reached, the survey is sent.

Send Notification - Select the notification to be sent to customers regarding the survey or use the ✚ Create New and ✎ View/Edit options to access the Custom Notification screen for creating or editing one. Use the Include fields link in that screen to include a link to the survey.

Available to Survey Agent for Changes - Select Yes to enable surveys to be sent on a change count interval basis. For each active survey definition, the Survey agent will first check the send conditions; if the send conditions of the closed change are not met, the process stops for the change. If the send conditions are met, the interval count is checked; if not reached, the process stops for the change. If the count has been reached, the customer/day count is checked. If not reached, the survey is sent.

The Survey agent uses the settings in both interval fields; if one of these fields is left blank, the field is not evaluated.

> **Survey Interval** - Enter the count of closed changes to be used by the survey agent for sending surveys automatically. (This does not apply to manually sent surveys.) For each active survey, when this count is reached, the survey will be sent to the customer associated with the closed change. For example, if 5 is entered at this field and 23 changes have been closed since the system last sent a survey, a survey would be sent to the fifth, tenth, fifteenth, and twentieth change customers.
>
> **Interval Between Surveys to Same Customer** - Use this field to enable surveys to be sent on a day interval; it enables you to ensure that a customer with a large number of changes does not receive too many surveys.
>
> Enter the number of days in the interval for sending a survey to the same customer. **For each active survey,** the survey agent will check the date the last survey was sent to the customer associated with the closed change. If the number of days that has passed is greater or equal to your entry in this field, the survey will be sent to the customer. The count is based on calendar days, not business days. This does not apply to surveys sent manually from the Change screen.

Available to Survey Agent for Incidents - Select Yes to enable surveys to be sent on an incident count interval basis. For each active survey definition, the Survey agent will first check the send conditions; if the send conditions of the closed incident are not met, the process stops for the incident. If the send conditions are met, the interval count is checked; if not reached, the process stops for the incident. If the count has been reached, the customer/day count is checked. If not reached, the survey is sent.

> **Survey Interval** - Enter the count of closed incidents to be used by the survey agent for sending surveys automatically. (This does not apply to manually sent surveys.) For each active survey, if the send conditions are met and this count is reached, the survey will be sent to the customer associated with the closed incident.
>
> For example, if 5 is entered at this field and 23 incidents have been closed since the system last sent a survey, a survey would be sent to the fifth, tenth, fifteenth, and twentieth incident customers if the send onditio.
>
> **Interval Between Surveys to Same Customer** - Use this field to enable surveys to be sent on a day interval; it enables you to ensure that a customer with a large number of incidents does not receive too many surveys.
>
> Enter the number of days in the interval for sending a survey to the same customer. **For each active survey,** the survey agent will check the date the last survey was sent to the customer associated with the closed incident. If the number of days that has passed is greater or equal to your entry in this field, the survey will be sent to the customer. The count is based on calendar days, not business days.
>
> This does not apply to surveys sent manually from the Incident screen.

Send Conditions for Agent and Rep Ad Hoc Use

Send conditions must be met in order for the agent to send a survey and for the survey to be included in the list of available surveys for ad hoc use. Note that these conditions do not apply when sending a survey via the Desktop View component Actions menu.

Logic Operator - Select All to send surveys based on every selected send condition (category, customer group, rep group, and closed incident status). Select Any to send surveys based on at least one of the selected send conditions.

Category - Use the Edit link to make the survey available for sending with incidents and changes that have a specified categorization.

The categorization level you specify in this field should be the highest level for matching with an incident or change categorization. For example, if the incident categorization is Network/Connection/Cable:

- If you select Network in this field, the survey will be available for saved incidents and sent after closed incidents with a first level categorization of Network, even if the second and third level categorization is different.
- If you select Network/Connection in this field, the survey will be available for saved incidents and sent after closed incidents with a second level categorization of Network/Connection, even if the third level categorization is different.

Customer Groups - Place the cursor in this field to select one or more customer groups, making the survey available for sending with incidents and/or changes that have the selected customer groups.

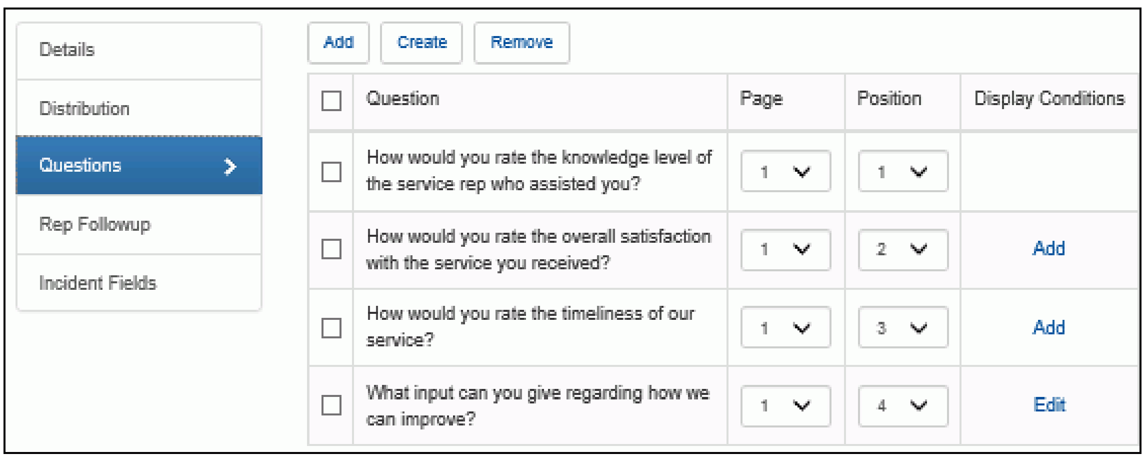
Rep Groups - Place the cursor in this field to select one or more support representative groups, making the survey available for sending with incidents and/or changes that have the selected support representative groups.

Closed Incident Statuses - Place the cursor in this field to select one or more closed incident statuses, making the survey available for sending with incidents that have the selected labels.

Closed Change Statuses - Place the cursor in this field to select one or more closed change statuses, making the survey available for sending with changes that have the selected labels.

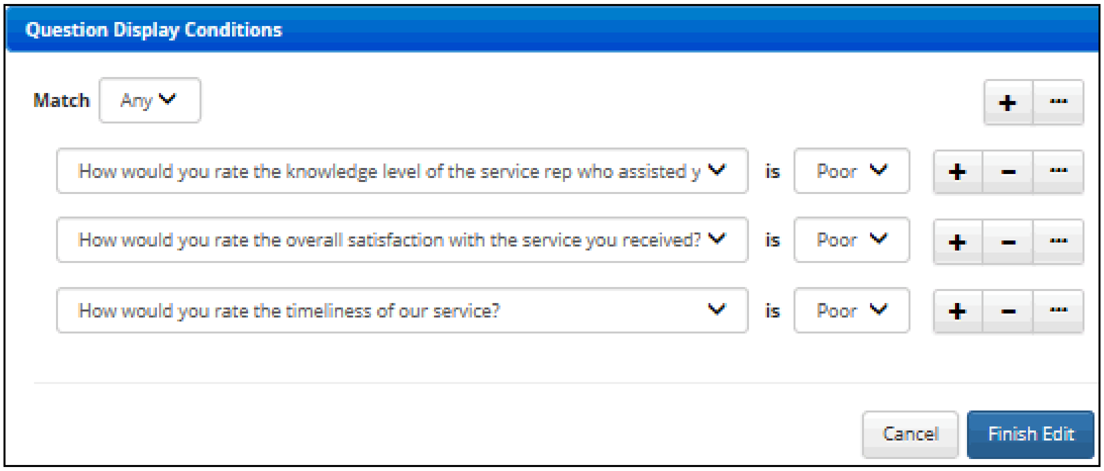
Including Survey Questions

Use the Questions tab to designate the questions to be included in the survey. Select Add to add a question or select the Create button to access the Add New Question dialog. Use the dropdowns in the Page and Position columns to order the questions.



Select the Add link in the Display Conditions column to display the Question Display Conditions for configuring display of a question based on one or more specified conditions. Use the first Match <All/Any> of the Following

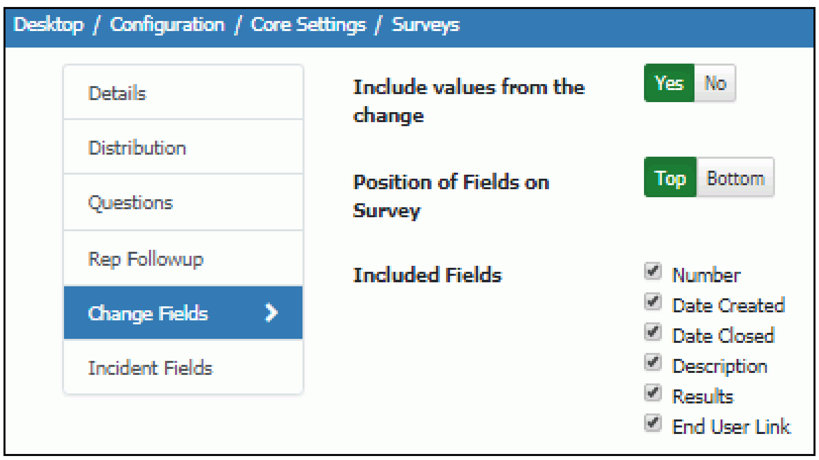
Conditions field to specify whether you want every configured condition to be met, or any configured condition to be met.



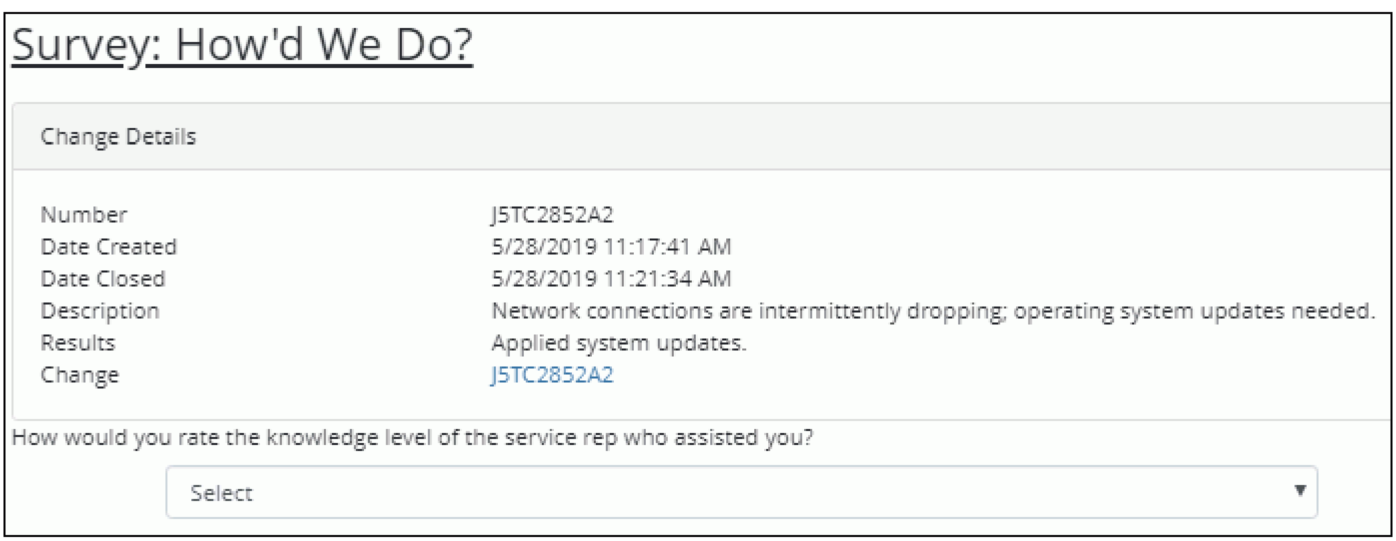
Use the + Add Condition and − Remove Condition options to display and remove a set of condition dropdown fields (a question, a list of comparison methods, and a list of values applicable to the selected question) to evaluate. You can use the ··· Add Condition Group option to put a set of conditions to be evaluated together in a group.

Including Change Fields

If you wish to include data values from Change record fields at the top or bottom of the survey, select the fields and positioning via the Change Fields tab.

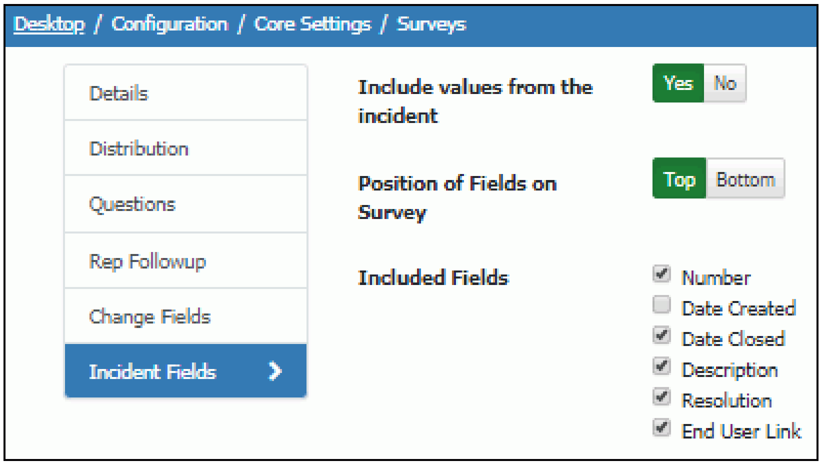


The details will appear in a generated survey as shown in the following example:

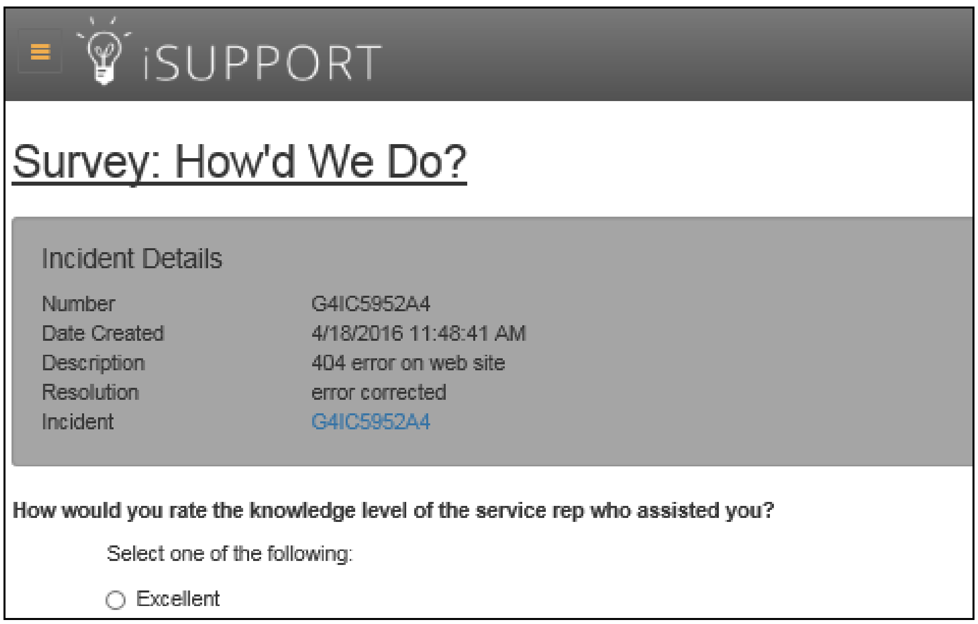


Including Incident Fields

If you wish to include data values from incident fields at the top or bottom of the survey, select the fields and positioning via the Incident Fields tab.



The details will appear in a generated survey as shown in the following example:



Previewing the Survey

When finished selecting questions for the survey, select the Preview button to save and display the survey for review. Select the Save button to save and close the Survey Definition dialog.

Sending Surveys

To send a survey, you can select the Survey icon or select New | Survey in the Incident and Customer Profile screens. You can also select multiple incidents, customers, or customers in a group in a view on the Desktop and then select Send Survey.

Open sent and submitted surveys via survey views on the Desktop. The Support Representative Profile screen includes permissions for viewing, editing, and deleting surveys.

Disabling Surveys

Do the following:

- To disable a survey from being submitted (an expiration message will appear), select a date in the Expiration field on the Details tab in the Survey definition dialog.
- To stop automatic distribution of all active surveys, disable the Survey agent. Note that surveys with an active definition will still be sent if the Survey agent is re-enabled.
- To stop a survey from being sent (automatically and manually), select No in the Active field on the Details tab in the Survey definition dialog.

Configuring Rules and Rule Groups for Surveys

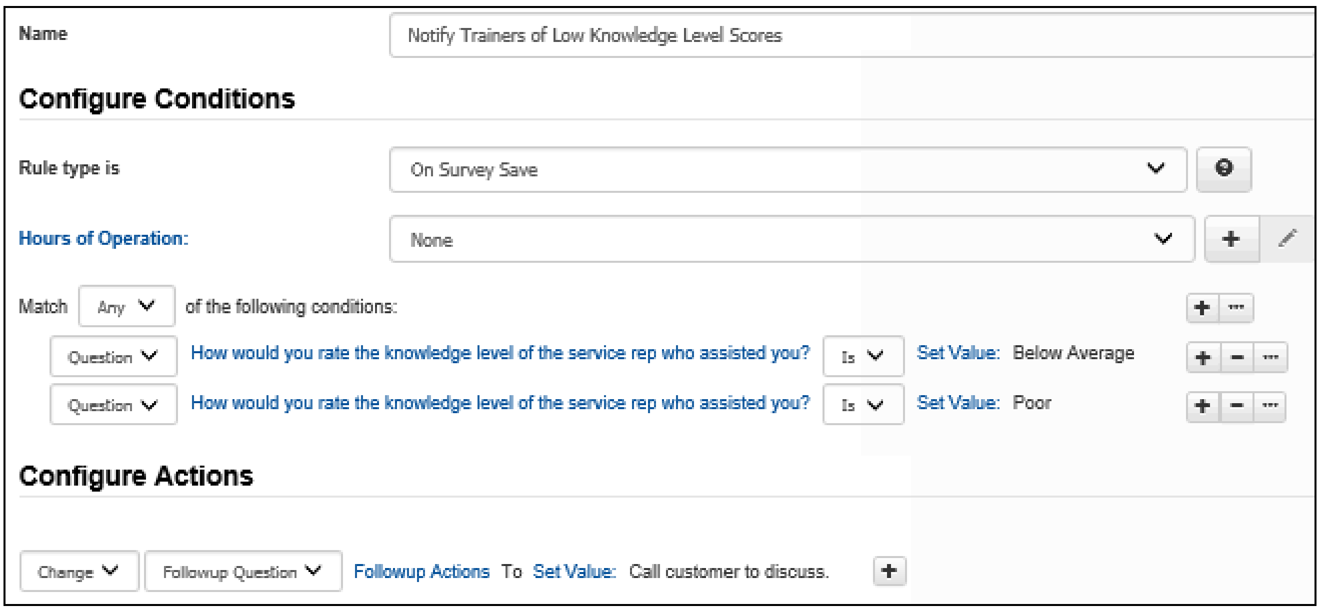
Overview

Use the Survey Rules screen to create **rules** that will perform actions when specified conditions are met. This functionality can be used to automatically change the status to Closed, set a value for a followup question, and send email and desktop notifications.

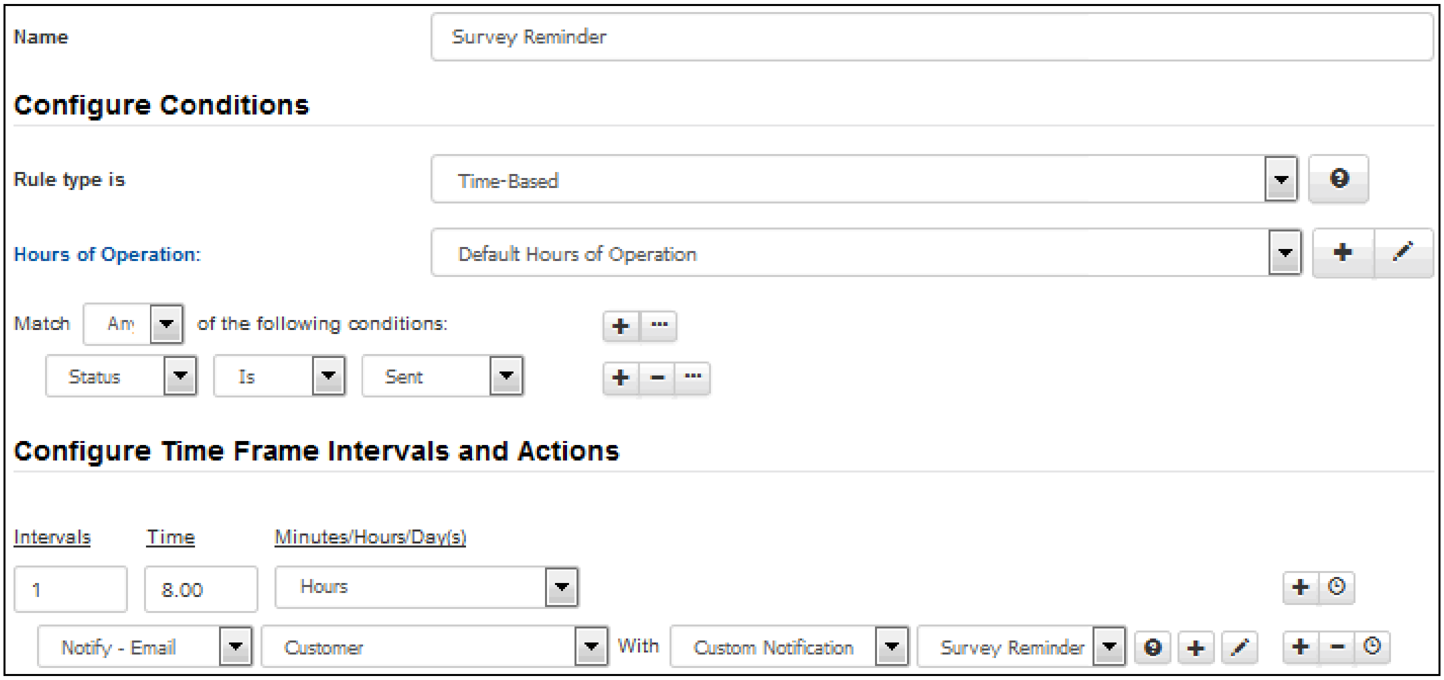
In order for a rule to be evaluated, it must be included in a **rule group**; rule groups are associated with surveys. When a survey request is saved (via any change to it including when it is sent or made available to mySupport, submitted via mySupport, or opened via a Desktop view, modified, and saved), all rules in the associated rule group are evaluated. If a rule's conditions are met, its actions are performed. A default survey rule group will be included in iSupport on installation or upgrade.

Rule Types

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



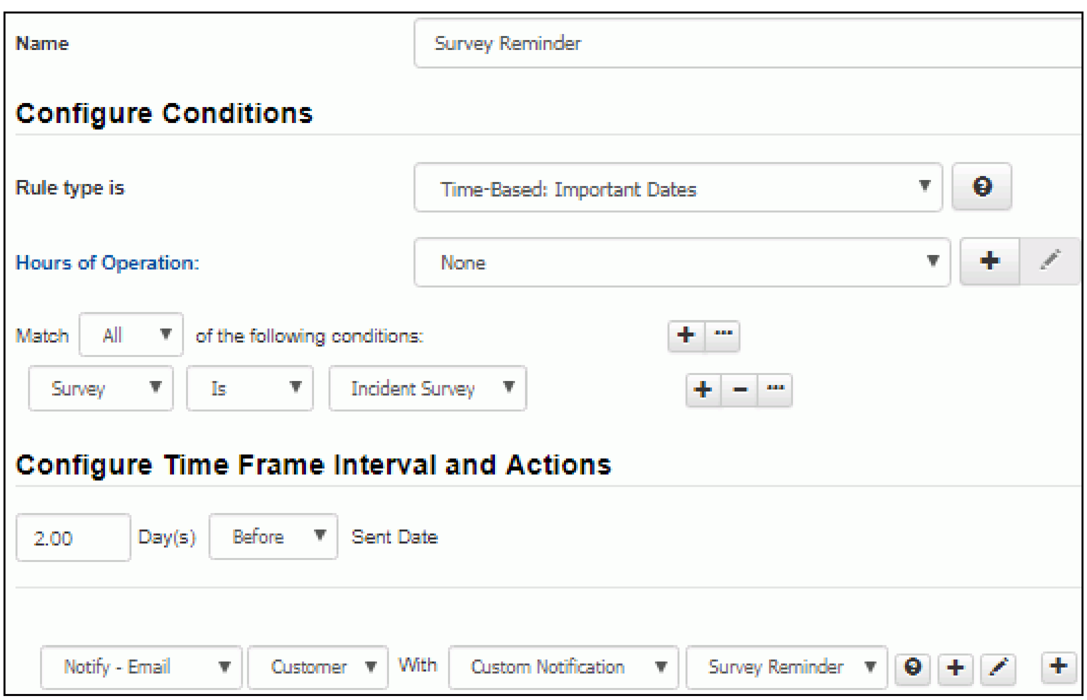
Time-Based and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon survey save, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent. This agent runs every minute.



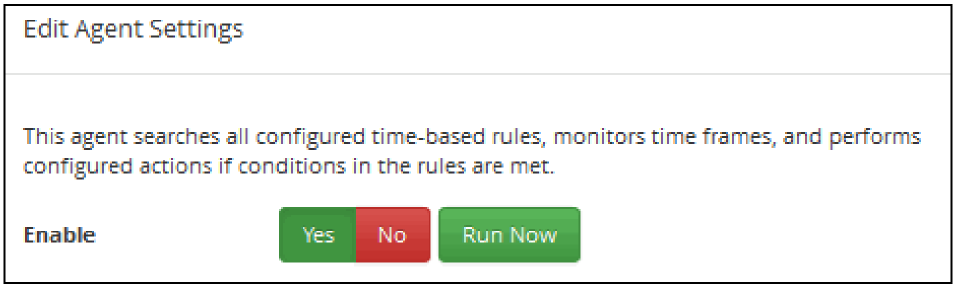
If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

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

Time-Based: Important Dates rules will display a field for entering a number of days and a Before/After dropdown; the specified action(s) will be performed when the defined number of days before or after the survey's sent date occurs.



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



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

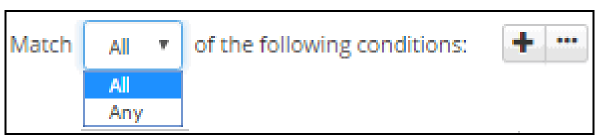
Creating Rules

Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections “Configuring Conditions” on page 18 and “Configuring Actions” on page 19 for more information. See “Creating Time Frame Intervals for Time-Based Rules” on page 22 for information on configuring interval time frames and actions to perform with each set of intervals.

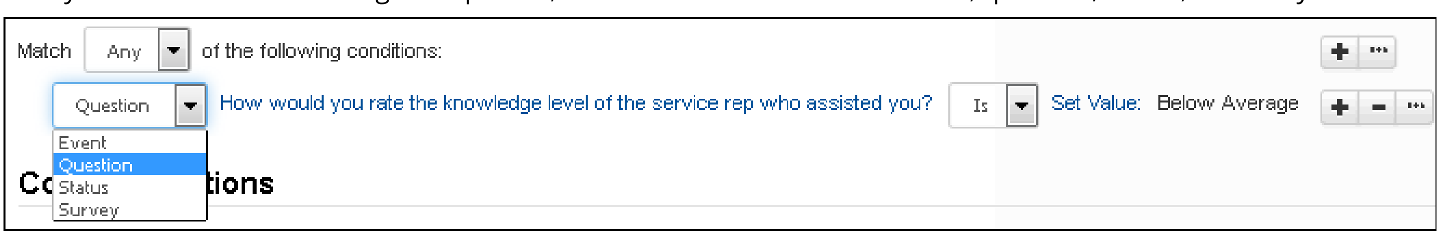
A configured **Hours of Operation** definition of 24 hours a day/seven days a week or selected date and time ranges can be used for the effective time frame for a time-based rule and for an on-save rule with a condition that includes "Within Business Hours". The default Hours of Operation definition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

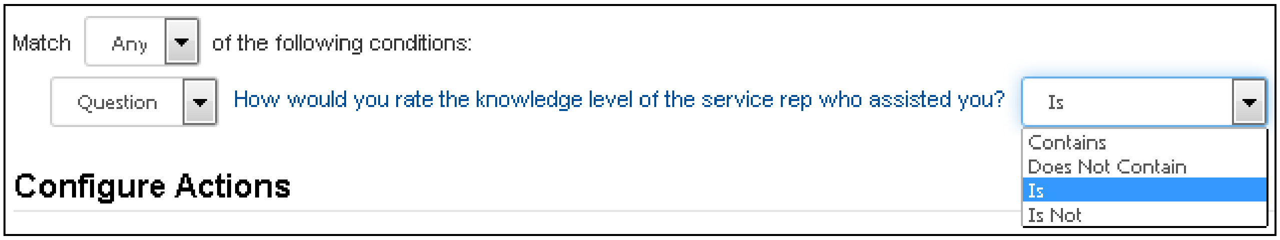
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



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 survey save. In the Select a Target dropdown, select what to evaluate: an event, question, status, or survey.



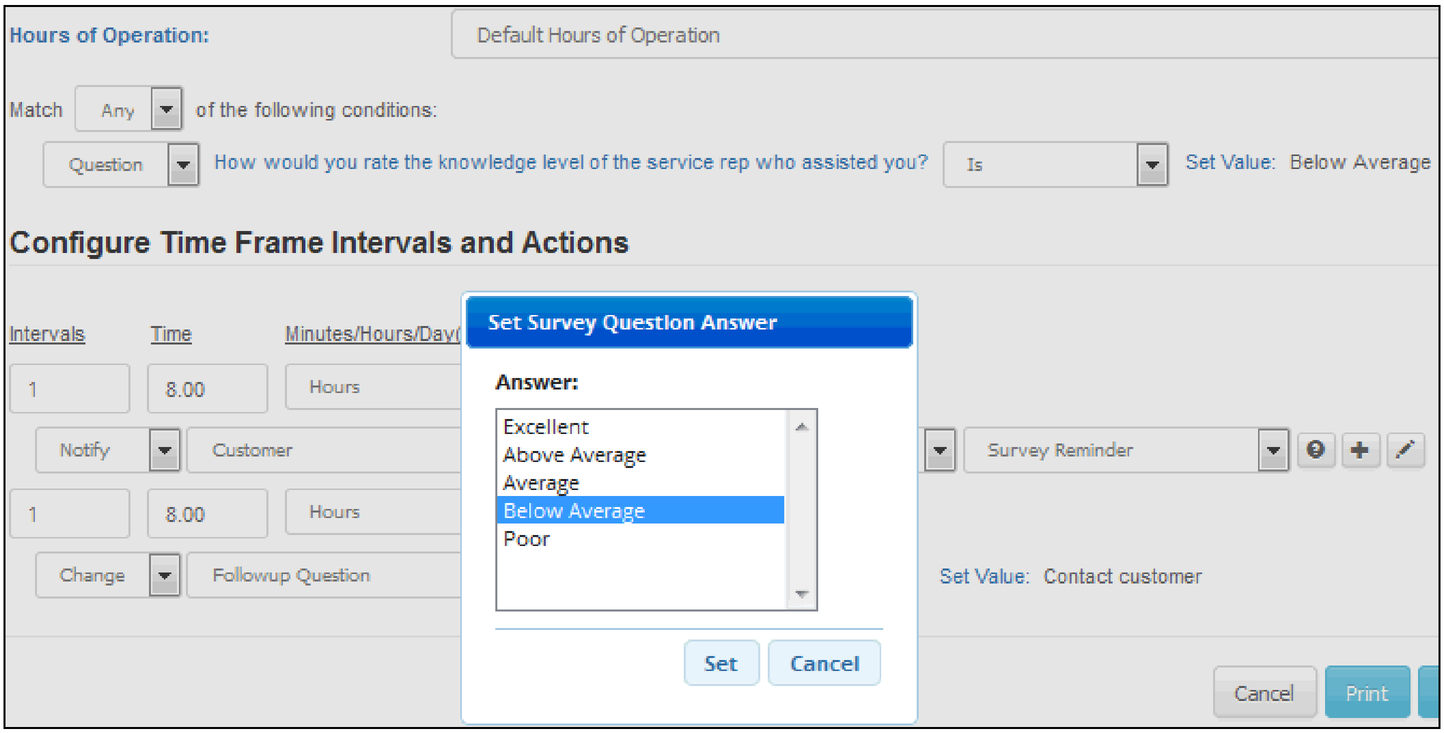
In the next dropdown, select the comparison method.



Note that:

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

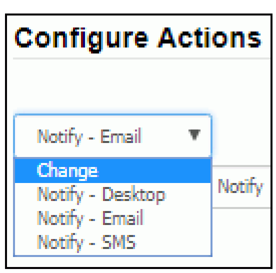
Finally, select the value to be used with the comparison method.



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

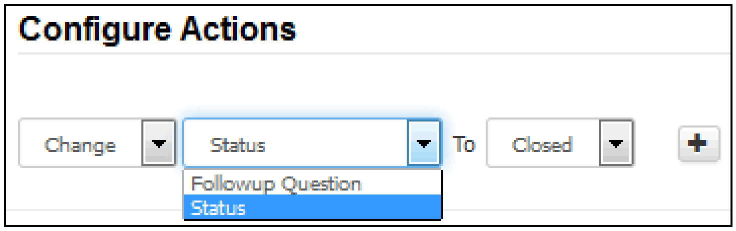
Configuring Actions

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

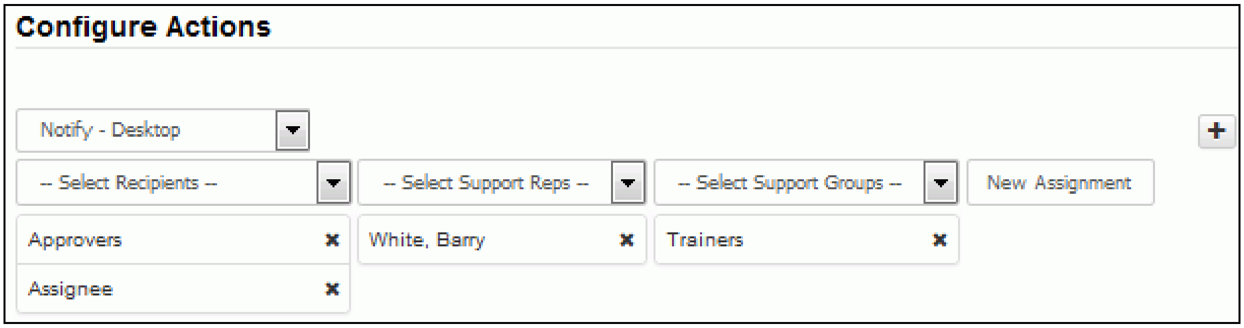


You can:

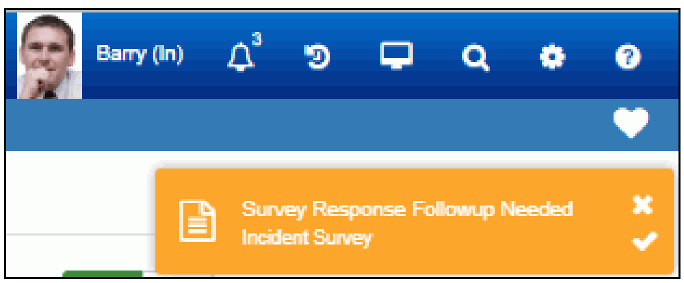
- **Change** the status to Closed or set the value of a followup question.



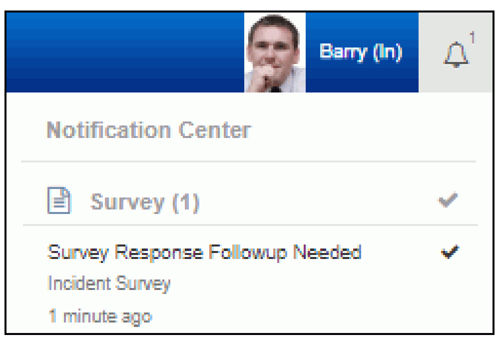
- **Send a notification** via desktop notification or email.
  - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



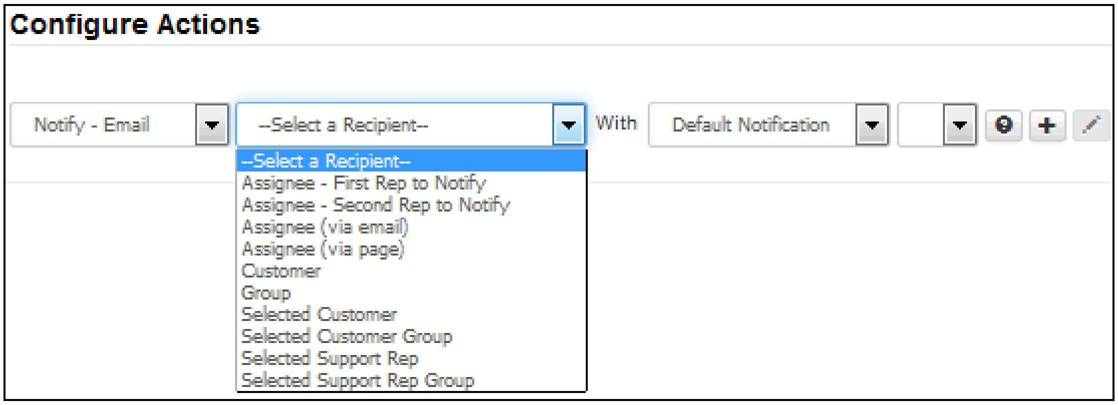
Options on the Desktop Notifications tab in Preferences (accessed by selecting the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.



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



You can select the default or a custom notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient.

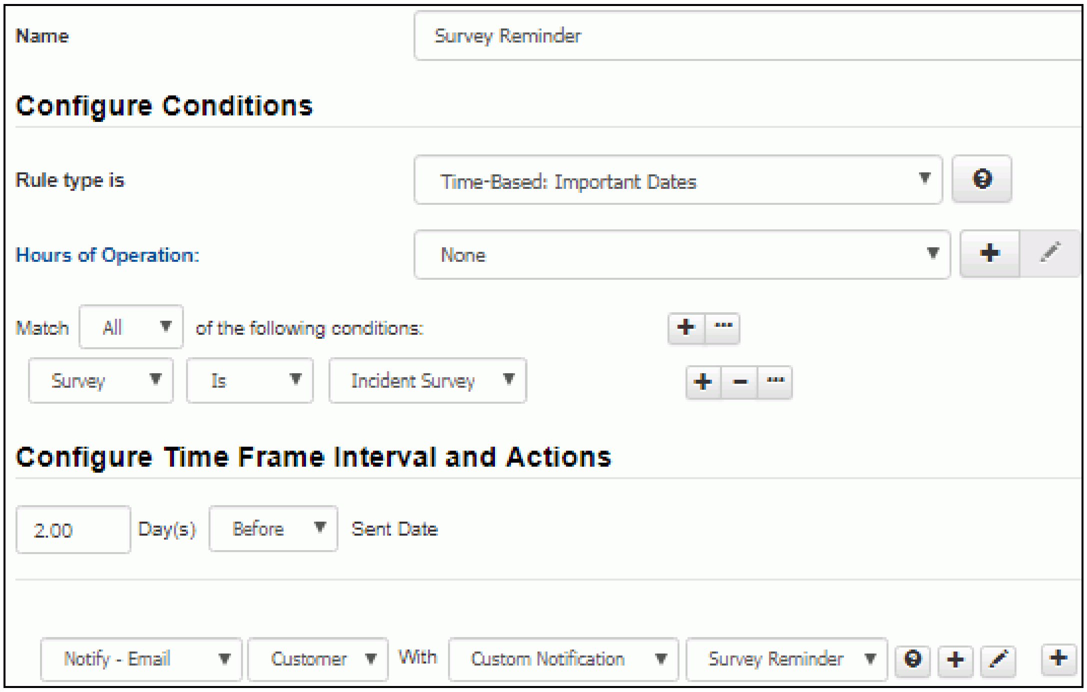
Select Show Notification to display the contents of the selected notification. Use the Create New and View/Edit options to access the Custom Notification screen.

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

Creating Time Frame Intervals for Time-Based Rules

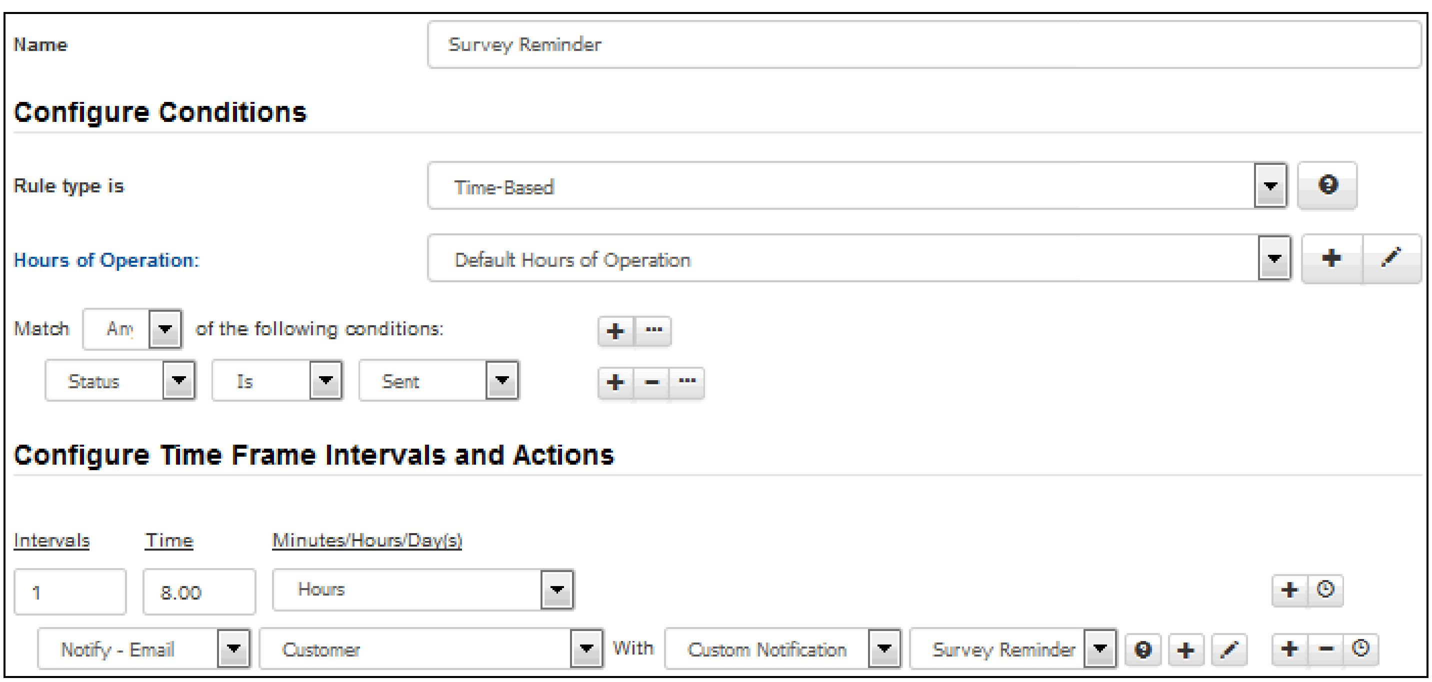
Time-Based: Important Dates Rules

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



Time-Based and Time-Based: Cumulative Rules

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

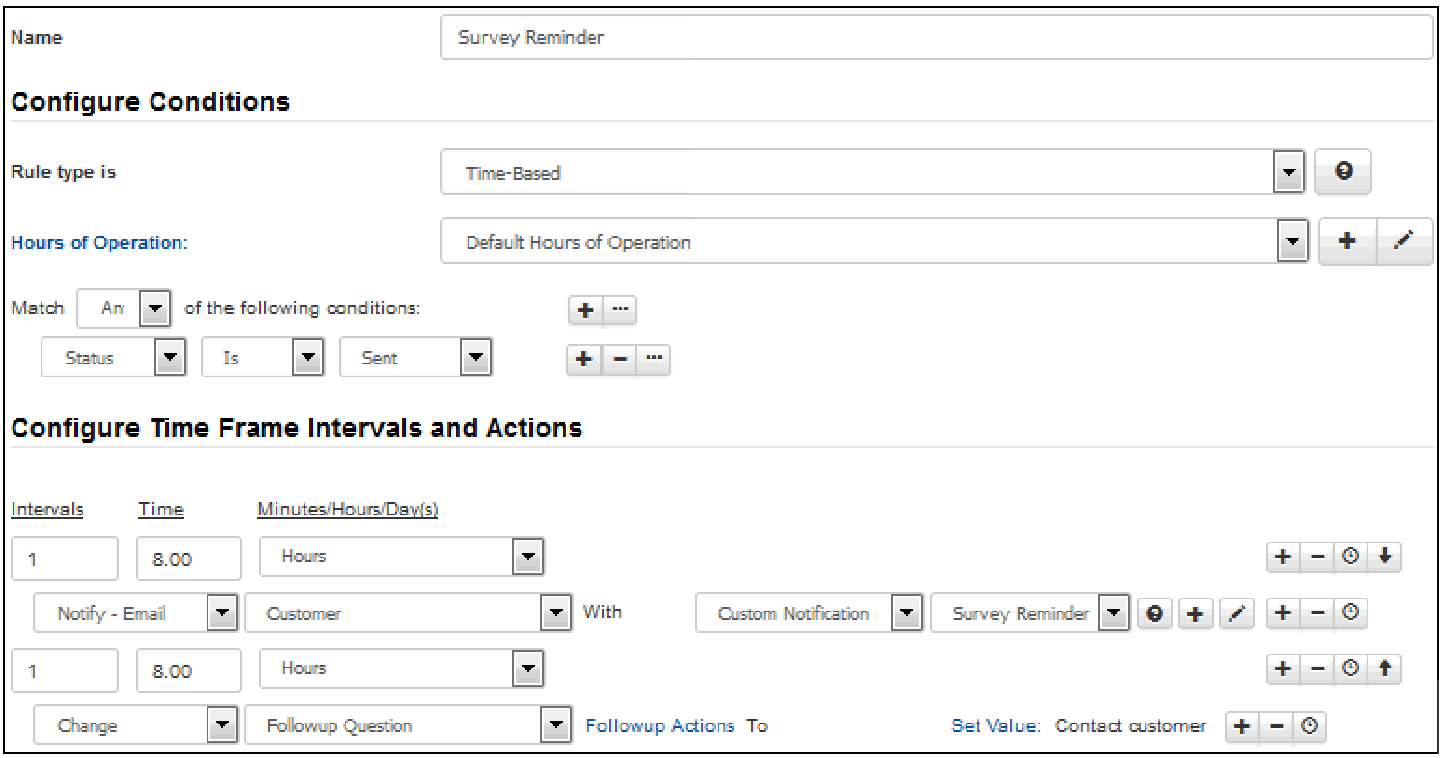


In the Configure Time Frame Intervals and Actions section, use the Intervals field to specify the number of times a time frame should be established and monitored, and use the Time and Minutes/Hours/Day(s) field to specify the amount and unit of time (in minutes, hours, or days) in the time frame. *Note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

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

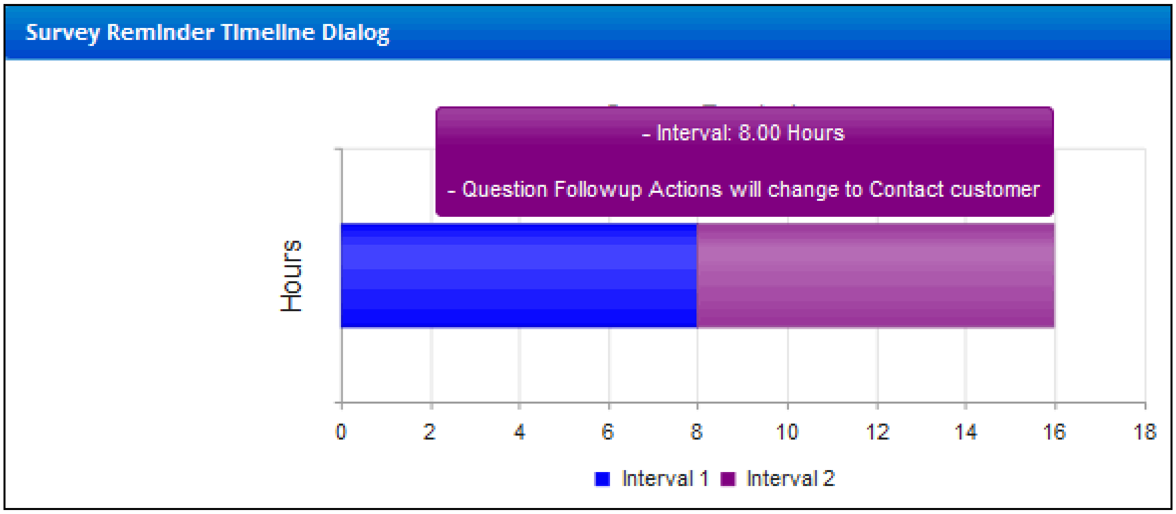
Configuring Multiple Time Frame Intervals

You can use the Add Interval option to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up options will appear for changing the order in which the interval time frames will be evaluated. In the example below, the survey will be monitored for an eight hour time frame and if the status remains at Sent for the entire eight hours, the Survey Reminder notification will be sent to the customer. The survey will then be monitored for an additional eight hour time frame and if the status remains at Sent for the entire eight hours, the Followup Actions followup question will be set to "Contact customer".



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.

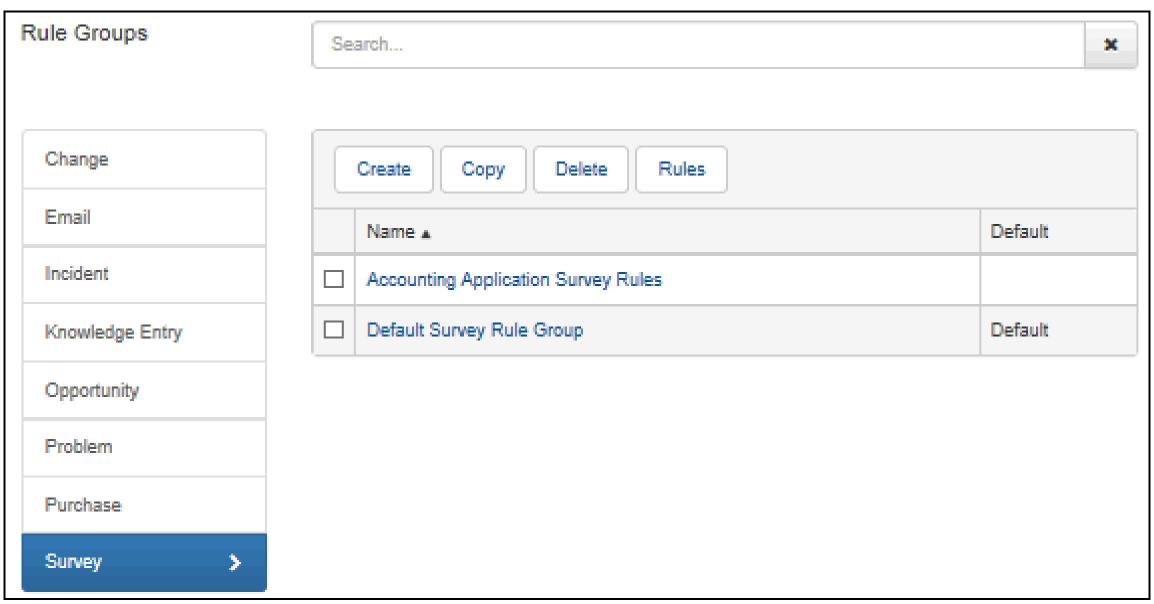


Printing a Rule

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

Associating Rules With Rule Groups

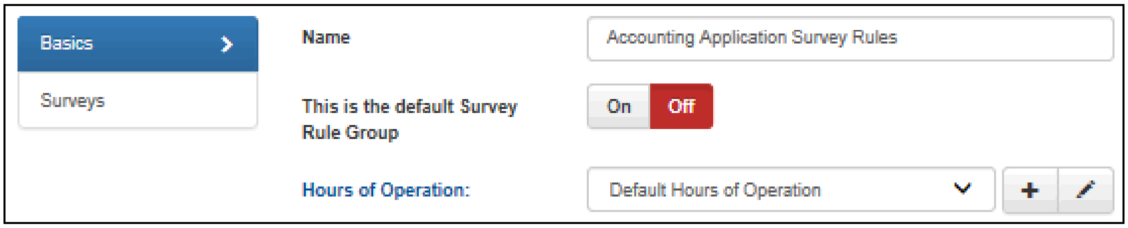
After creating a rule, you'll need to include it in a rule group. You can do this via the Rule Group tab in the Rules screen, or via the Rule Group screen. On the Rule Groups tab, select the Add link. Rule groups configured via the Rule Group screen appear; select the applicable groups and select OK.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



All rules in the rule group associated with a survey are evaluated when a survey 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

Select the Create link in the Survey Rule Groups list screen to create a rule group that can be used as default and/or applied to surveys.



Name - Enter a name for the rule group.

This is the Default Survey Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the survey.

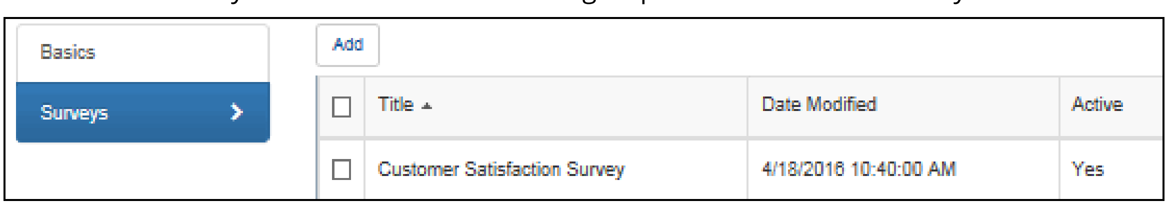
Default Hours of Operation - Select the Hours of Operation definition that will apply if no definition is selected for a time-based rule or for an on-save rule with a condition that includes "Within Business Hours" in the rule group. Use the + Create New and View/Edit options to access the Hours of Operation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

Adding Rules

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

Assigning a Rule Group

Use the Add link on the Surveys tabs to associate the rule group with one or more surveys.



Printing the Rule Group Summary

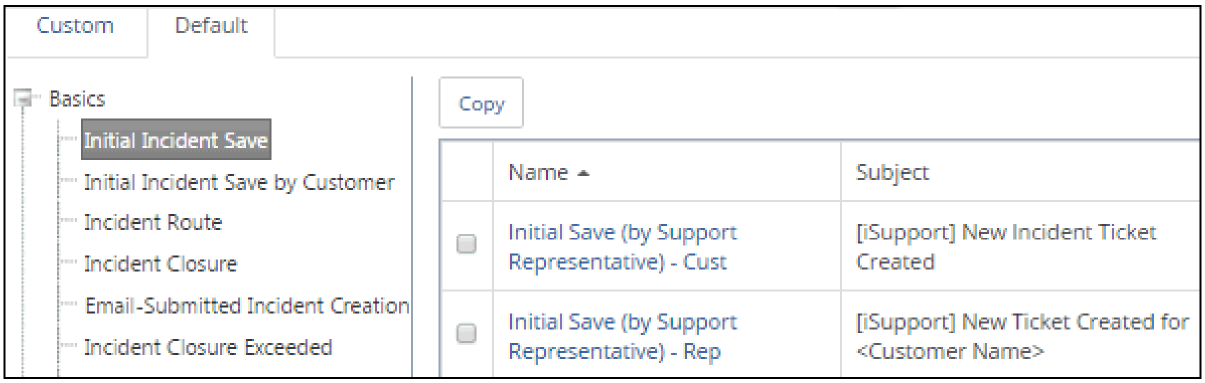
Select the Print button to display a summary of your saved entries; you can select the Print link in the dialog to send the information to the printer.

Customizing and Viewing Event Notification Content

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

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

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



About Recipients

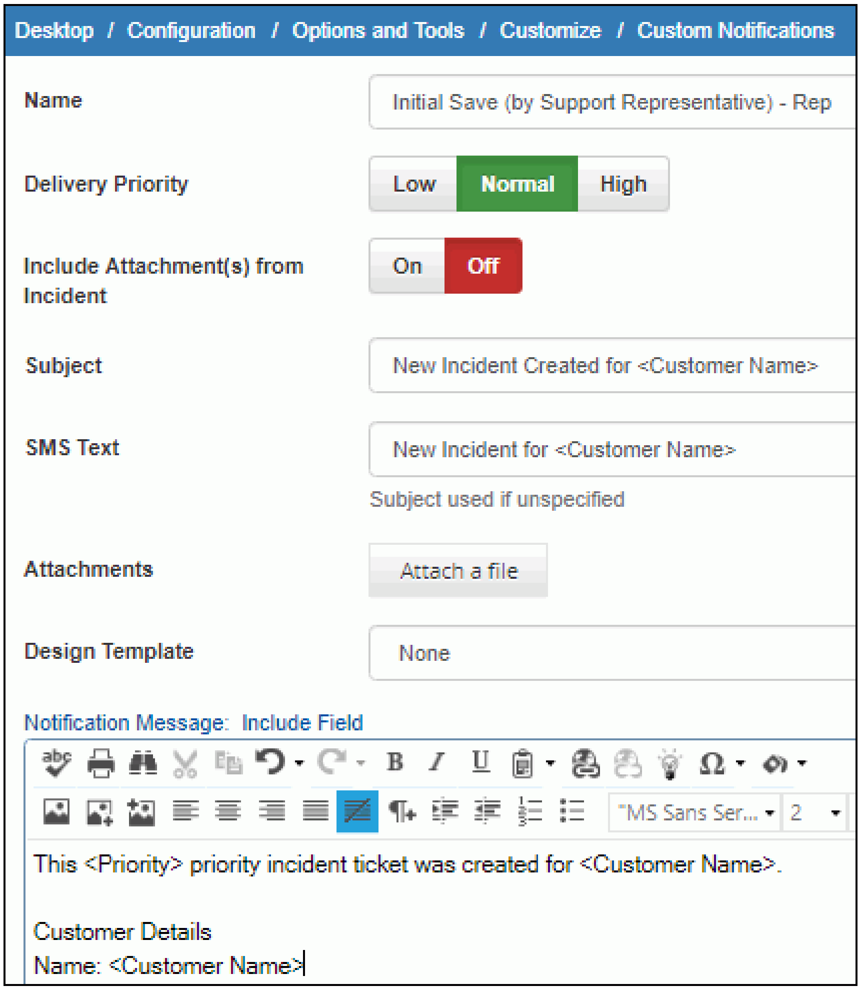
Recipients for default notifications can include both support representatives and customers, and the default notification text is different for each. Support representative notifications (designated as "Rep") typically contain customer details, the priority, the assignee, the URL to Desktop incident,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

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

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

Creating a Custom Notification

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



Name - Enter a name for the custom notification.

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

Design Template - If desired, select the design template with the elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). You can select the Create New or View/Edit options to access the Design Template screen; see "Configuring Design Templates" on page 28 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.

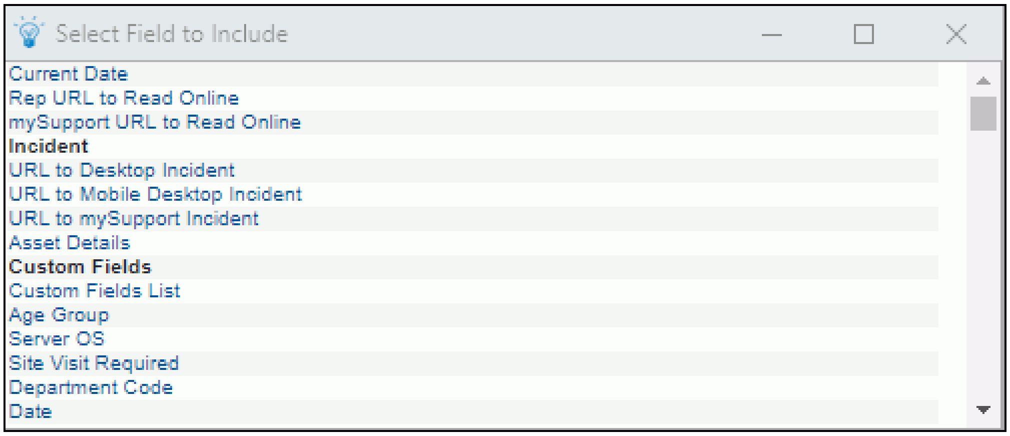
If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. See "Configuring Twilio Integrations" on page 29 for more information.

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

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

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

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



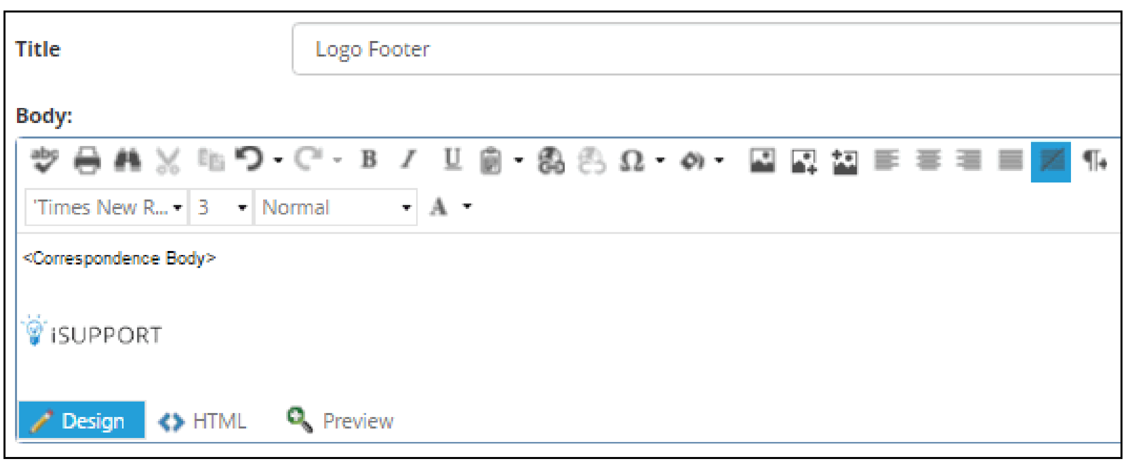
Include Attachment(s) from <record type> - For all modules except Asset, CMDB, Discussion Posts, Security, and Alerts, select this checkbox to associate any attachments from the referenced work item type to the notification when it is sent.

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

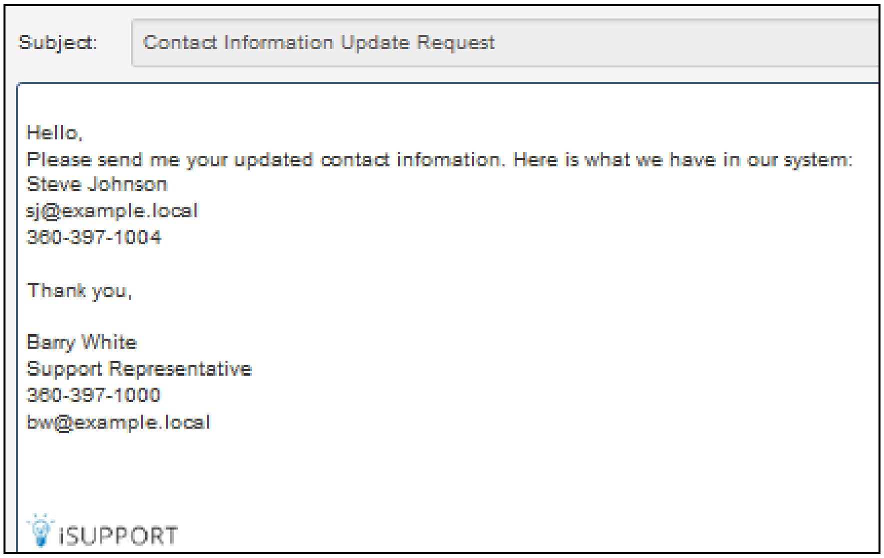
Note: If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

Configuring Design Templates

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

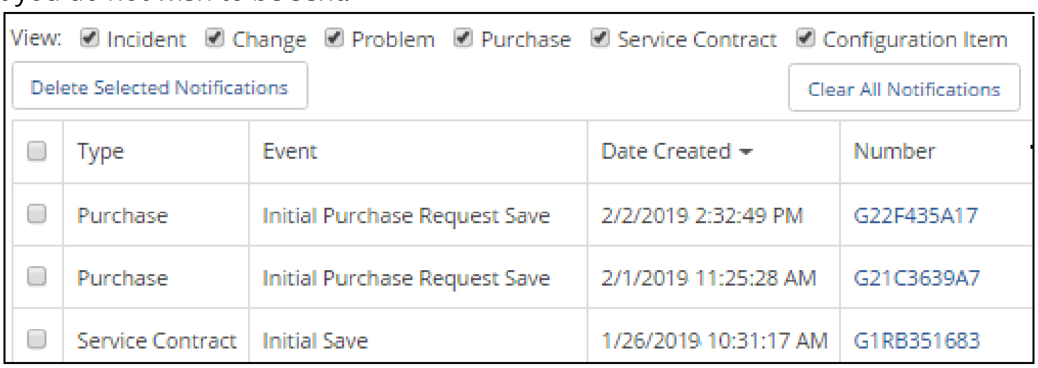


If a support representative sending a correspondence with the design template has a signature block, design elements that are after the <Correspondence Body> tag will appear after it.



Displaying the Notification Queue

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



	Type	Event	Date Created	Number
	Purchase	Initial Purchase Request Save	2/2/2019 2:32:49 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 AM	G1RB351683

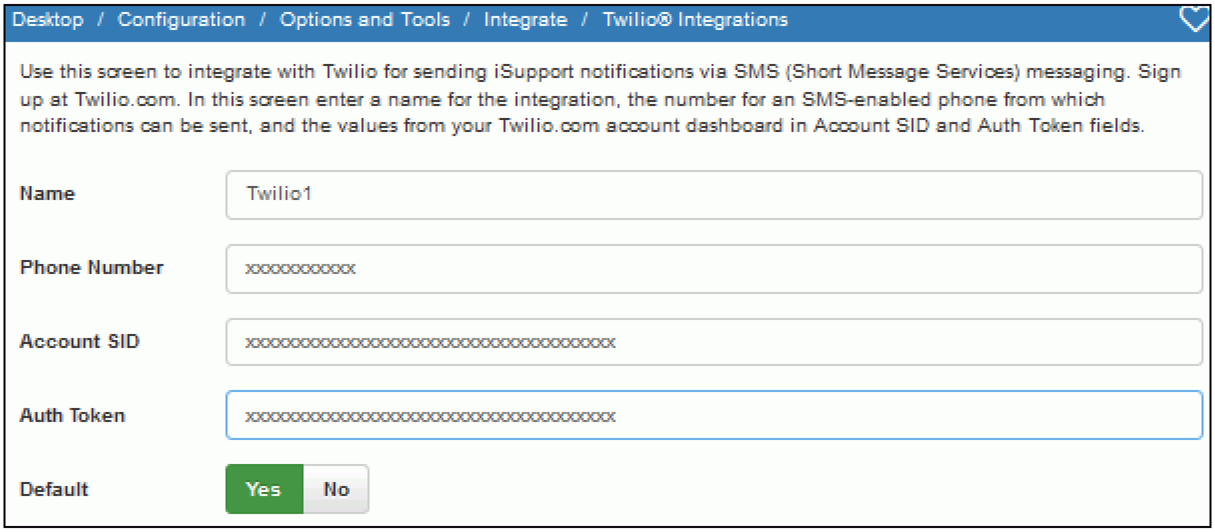
Configuring Twilio Integrations

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 number in the Mobile field; if Twilio is not configured, the SMS email from mySupport (email to text); if that is unavailable, the address in the Email field.

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

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



Name - Enter a name for the Twilio integration.

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

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

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

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