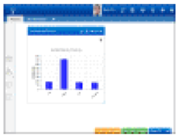
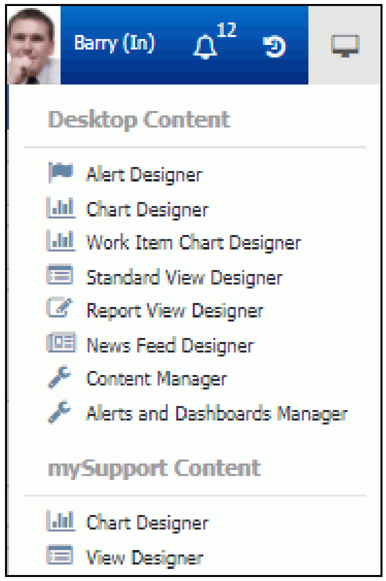


Configuring iSupport® Views, Charts, and Alerts

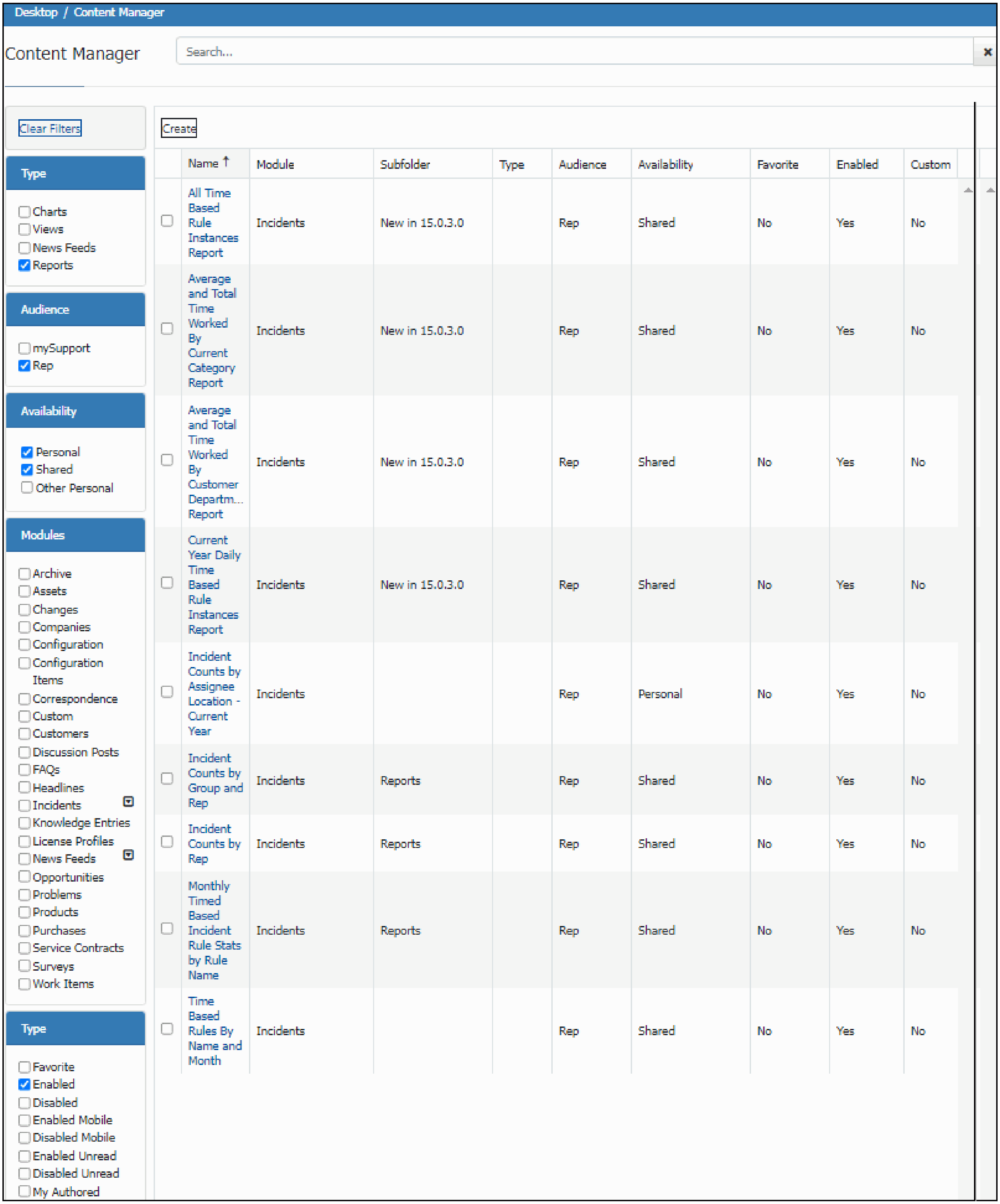
Select **Desktop Content** on the Desktop to configure and manage views, charts, alerts, and news feeds.



- Set up alerts to appear in the Desktop Notifications list (and popup if configured) when a view field reaches a certain threshold via the **Alert Designer**. See "Creating Alerts" on page 15.
- Select **Chart Designer** to set up a chart that will display data on any view field; you can create a gauge, column, bar, line, pie, or area chart. See "Using the Chart Designer" on page 19 for more information. These charts display in the Chart component on the Desktop. You can set up a chart for display on mySupport via the Content Manager; see below.
- Select **Work Item Chart Designer** to set up a chart for display data in area, stacked area, bar, stacked bar, column, and stacked line format for tracking incidents, problems, changes, and purchase requests for a specified time frame. See "Using the Work Item Chart Designer" on page 23 for more information.
- Use the **Standard View Designer** to create a standard view with a few calculated fields but no calculated counts, percentages, sums, averages, minimums, and maximums on selected fields. Use the **Report View Designer** to create a report view with calculated counts, percentages, sums, averages, minimums, and maximums on all selected fields. See "Using the View and Report Designers" on page 3.
- Use the **News Feed Designer** to configure contains feeds that can contain discussion posts (entered via the News Feed component on the iSupport Desktop and mySupport portal) and/or entries for work item updates.
- Use the **Alert and Dashboard Manager** to:
  - Configure **alerts** that appear in a desktop notification (and popup if configured) when a view field reaches a certain threshold. For example, you can configure an alert to appear when a certain number of Emergency priority incidents has been reached. See "Creating Alerts" on page 15.
  - Add, delete, and rename **dashboards**, set dashboard access, and automatically add a dashboard for all support representatives. See the online help for more information.

Content Manager

Use the **Content Manager** to display lists of news feeds and default and custom charts and views, and access these items for editing, copying, enabling or disabling for mobile use, and enabling or disabling read/unread marks. Use the options on the left to filter the list and display desired news feeds, views, and charts; then use the checkboxes to select items for further action. Your selections will be retained if you exit and then re-access the Content Manager.



Name ↑	Module	Subfolder	Type	Audience	Availability	Favorite	Enabled	Custom
All Time Based Rule Instances Report	Incidents	New in 15.0.3.0		Rep	Shared	No	Yes	No
Average and Total Time Worked By Current Category Report	Incidents	New in 15.0.3.0		Rep	Shared	No	Yes	No
Average and Total Time Worked By Customer Departm... Report	Incidents	New in 15.0.3.0		Rep	Shared	No	Yes	No
Current Year Daily Time Based Rule Instances Report	Incidents	New in 15.0.3.0		Rep	Shared	No	Yes	No
Incident Counts by Assignee Location - Current Year	Incidents			Rep	Personal	No	Yes	No
Incident Counts by Group and Rep	Incidents	Reports		Rep	Shared	No	Yes	No
Incident Counts by Rep	Incidents	Reports		Rep	Shared	No	Yes	No
Monthly Timed Based Incident Rule Stats by Rule Name	Incidents	Reports		Rep	Shared	No	Yes	No
Time Based Rules By Name and Month	Incidents			Rep	Shared	No	Yes	No

If you have access to open an item, its name will be a link. An asterisk after a view name indicates that a chart is based off of it.

Type - Charts display iSupport incident, problem, change, and purchase request data for a specified time frame in the Chart or Gauge component in the iSupport Desktop and in the Chart component on a mySupport portal. Note that you can only copy charts included in iSupport by default. Area, stacked area, bar, stacked bar, column, gauge, pie, line, and stacked line charts can be created. **Views** display iSupport data in rows in the View component on the iSupport Desktop and on mySupport portals. **News feeds** can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. **Reports** are views that enable you to configure calculated counts, percentages, sums, averages, minimums, and maximums on all selected fields.

Audience - The **mySupport** option displays items that are created for display to customers using a mySupport portal. These items are created/edited via the Chart Designer, Standard View Designer, and Report View Designer options under mySupport Content on the Desktop Content menu. The **Rep** option displays items that are created for display to support representatives and administrators using the iSupport Desktop. These items are created/ edited via the Chart Designer, Standard View Designer, and Report View Designer options under Desktop Content on the Desktop Content menu.

Availability - Views and charts are designated as Personal or Shared via the Access field in the Chart and View Designers. **Personal** includes items that you have created and designated as Personal; **Shared** includes items that have been designated as Shared or are included in iSupport by default. **Other Personal** includes items that have been designated as Personal by other support representatives. The personal views of other support representatives will appear to you with their name if you have the Edit Other Personal View or Delete Other Personal View permission, and the charts marked as personal by other support representatives will appear if you have the Edit Other Personal Chart or Delete Other Personal Chart permission.

Modules - The Modules list includes options for the data sources from which views can be created; these options indicate the types of data on which views are based. The Custom option displays custom SQL views/queries of iSupport data configured via the **Design Custom View** link in the Standard View Designer. Note that the **Work Items** option includes views with mixed (incident, problem, change, and purchase) work items and a limited range of fields.

Type -

- **Favorite** - This option will display the views in your Favorites folder in the View component. Include a view in this list by right-clicking on a view in the selection dropdown and selecting Add to Favorites.
- **Enabled/Disabled** - These options display views and charts that have been enabled or disabled (respectively) in the Standard View Designer, Report View Designer, and Chart Designers. Note that support representative permissions may prevent display of views and charts.
- **Enabled/Disabled Mobile** - These options display views that have been enabled or disabled (respectively) for display on a mobile device via the Standard View Designer or Report View Designer; enabling a view for display on a mobile device will cause the content to appear in rows instead of columns. Note that mySupport portal views are automatically mobile-enabled.
- **Enabled/Disabled Unread** - These options display incident, problem, change, and purchase views that have read/unread indicators enabled or disabled (respectively) via the Standard View Designer or Report View Designer. In a view with the read/unread function disabled, all folders are blue. In a view with the read/unread function enabled, a green folder displays next to an unread item or a folder with both unread and updated items, a yellow folder displays next to a folder with at least one updated item, and a blue folder displays next to a closed or read item or a folder with both closed and read items.
- **My Authored** - This option displays the items that you have created.

Using the View and Report Designers

Use iSupport's View and Report Designers to create a view of iSupport data that you can display on the Desktop and export in Microsoft® Excel (*.xls), Microsoft® Word (*.doc), Portable Document Format (*.pdf), or Comma Separated Value Format (*.csv). You can create a new view or make a copy of an existing view and modify it to create a new view. (Note, however, that only limited modifications can be made to shared views included by default in iSupport.) You can utilize iSupport's predefined data fields or any custom SQL views/queries that you have created.

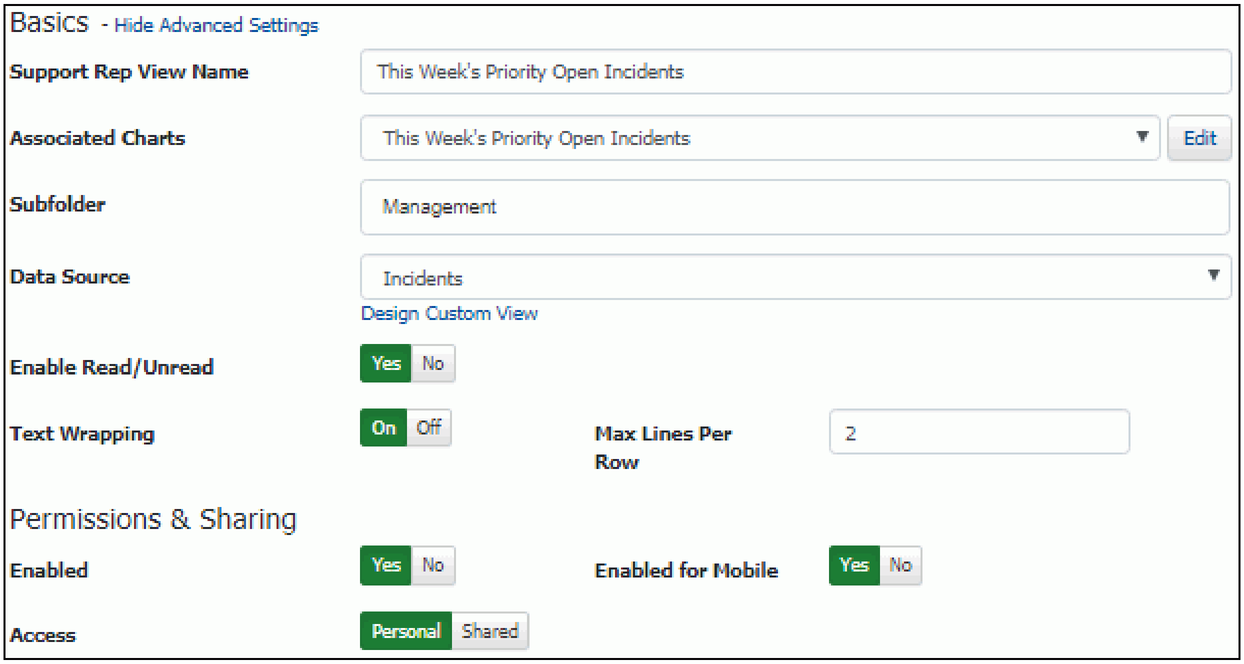
Access the View and Report Designers via the Standard View Designer and Report View Designer options on the Desktop Content menu, the Create option in the View Component, the Edit option next to views you create or shared views in the View Component, and buttons that display after selecting a view in the Content Manager.

Note: the Associated Work Item Counts fields in the Incident, Change, Problem, and Purchase data sources always reflect the total count of associated items, even if the viewing support representative does not have access to all of the associated items. A discrepancy might exist between a listed count in one of the new fields and the number of items listed in the associated work item grid because the associated work item field only provides information about and links to the associated items to which the user has view permissions.

Use the View Tour link in the upper right corner of the screen to display a short series of tips.

Configuring Basic Settings

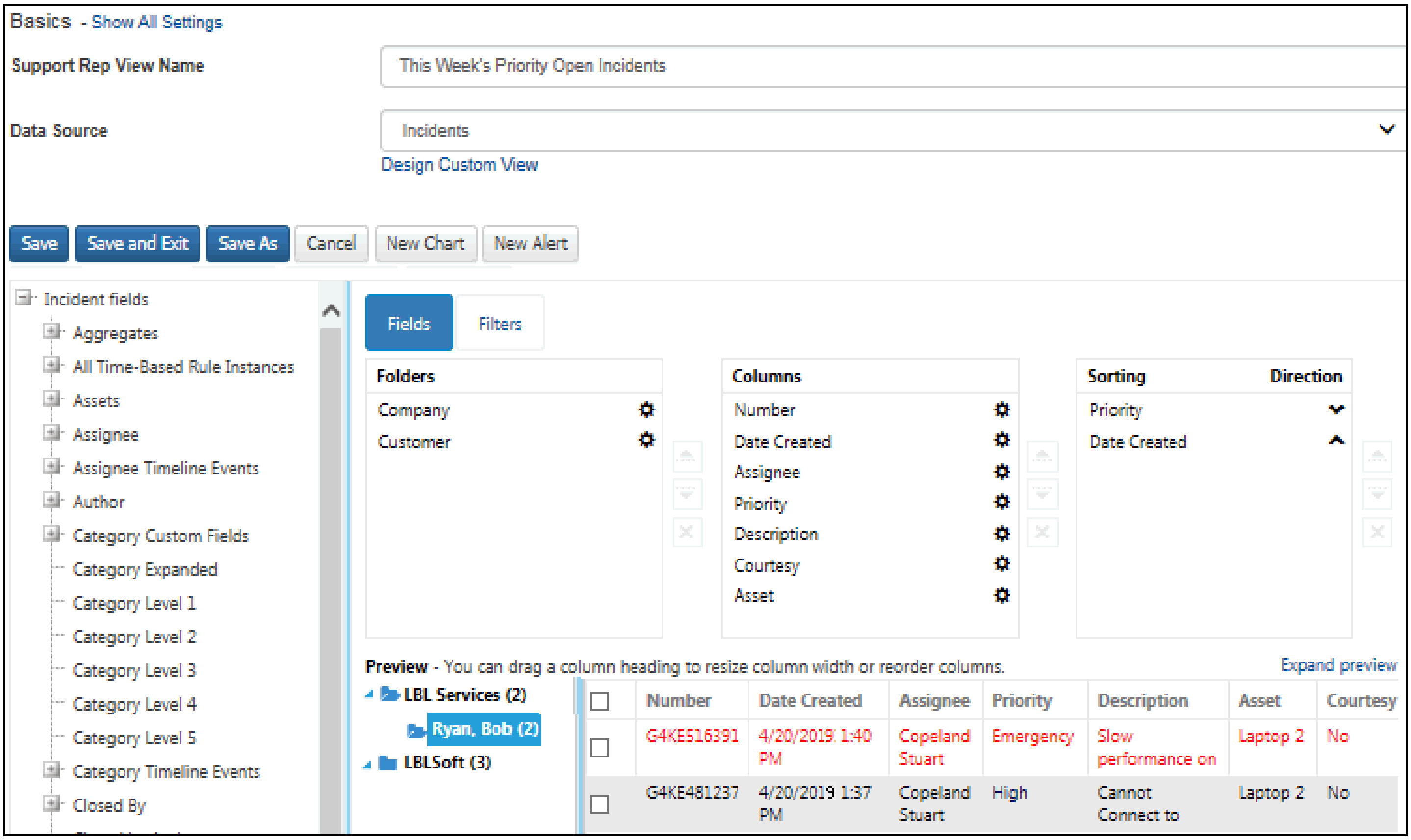
Click the Show Advanced Settings link to configure settings that affect the entire report.



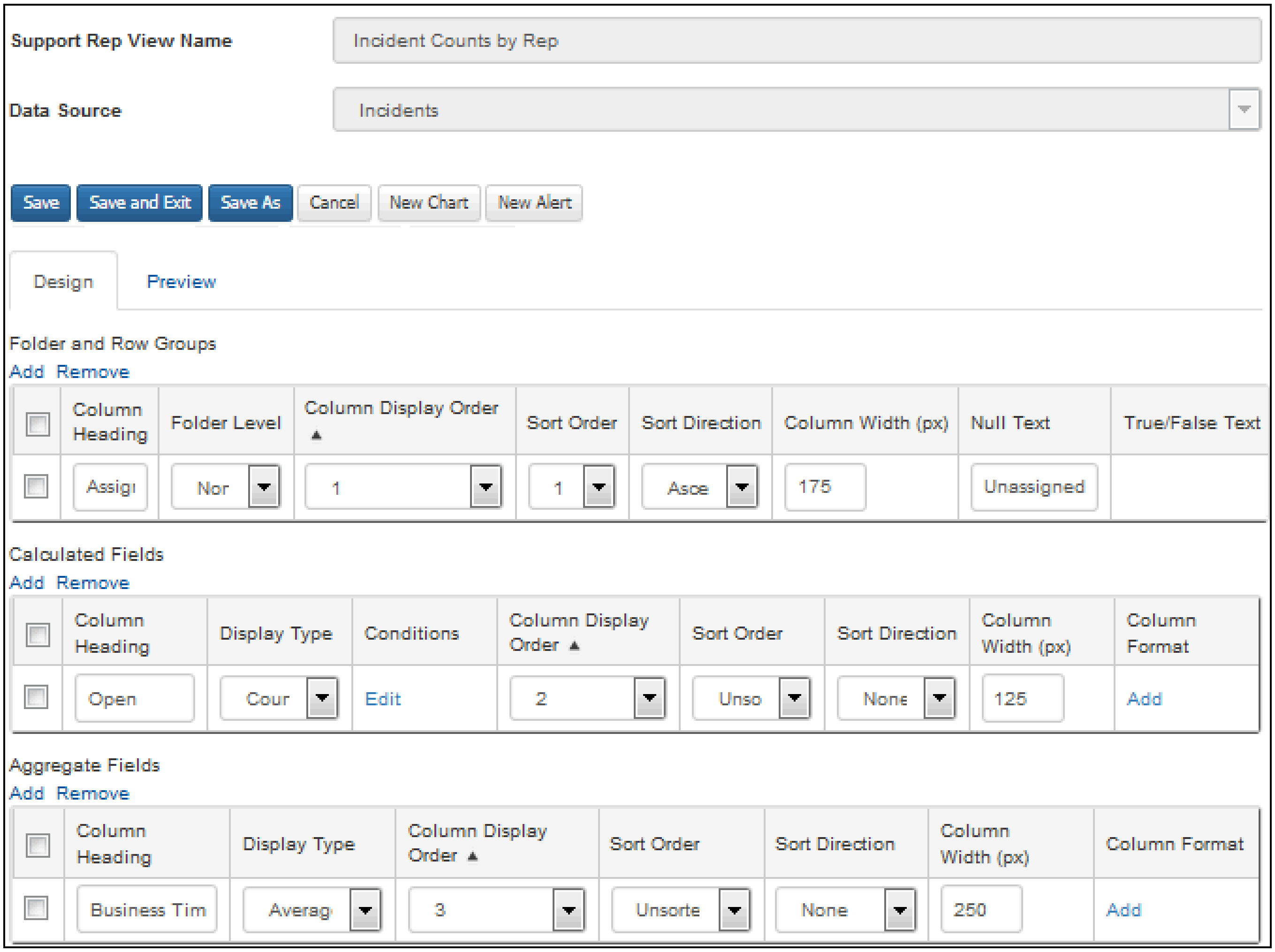
In the **Subfolder** section, enter the name of the folder in which to place the view in the Content Manager and in view lists. This folder will be placed under the folder named after the data source selected for the view.

There are two **view types**:

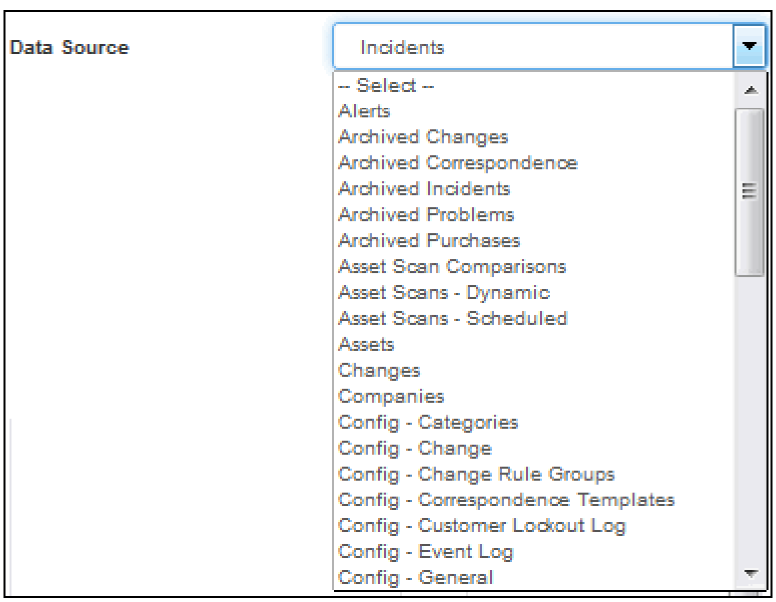
- **Standard views** contain a few calculated fields (under the Aggregates field section) but do not enable you to configure calculated counts, percentages, sums, averages, minimums, and maximums on selected fields. See "Configuring a Standard View" on page 8 for more information.



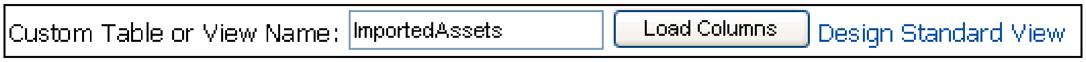
- **Report views** enable you to configure calculated counts, percentages, sums, averages, minimums, and maximums on all selected fields. See "Configuring a Report View" on page 13 for more information.



In the Data Source field, select the type of data on which the view will be based. The Config options in the dropdown list correspond to functionality enabled in the Configuration module.



Use the **Design Custom View** link next to the Data Source Field to utilize any custom SQL views/queries of iSupport data. The Custom Table or View Name field appears for you to enter the name of the query or custom SQL table of iSupport data. Click the Load Columns button to display the fields available for the view. Use the **Design Standard View** link to redisplay the Data Source field.



The **Enabled Read/Unread** field appears for incident, problem, change, and purchase views. In a view with the read/unread function not enabled, all folders are blue. Select Yes to display:

- A green icon next to an unread item or a folder with both unread and updated items.
- A yellow icon next to a folder with at least one updated item.
- A blue icon next to a closed or read item or a folder with both closed and read items.

Right-click on a folder to display Mark All Read and Mark All Unread options.

Select On in the **Text Wrapping** field to, for all text fields in the view, restrict the number of lines that display in a cell. The maximum number you can enter in the Max lines Per Row field is 10.

Configuring Permissions and Sharing

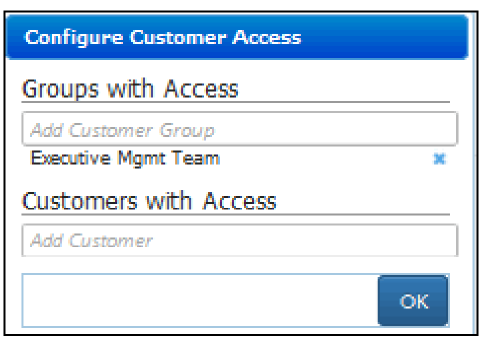
In the **Enabled** field, select No if you wish to prevent the view from being included in the Chart Designer, Alert settings screen, and in the list of views available for selection by support representatives. Views can also be disabled after selection in the Content Manager.

The **Enabled for Mobile** field appears in the View Designer for rep views (mySupport views as they are automatically optimized for display (with rows instead of columns) on a mobile device). Select Yes to enable the view for display on a smart phone (iOS, Android, or Blackberry) or tablet to access iSupport. Views can be disabled for mobile use in the Content Manager.

In the **Access** field, select one of the following. Note that permissions control whether you can create a personal or shared view.

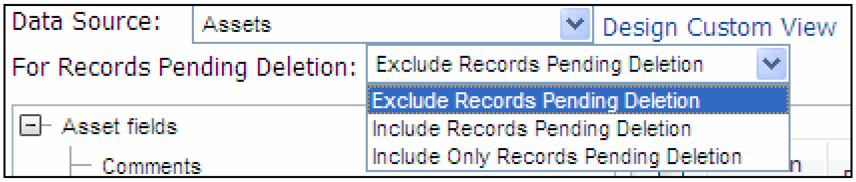
- For **Rep Views**:
  - Personal to enable only you and those with the Edit Other Personal Views permission in their Support Representative Profile record to add it to a Desktop dashboard.
  - Shared to make the view available for other support representatives to add to their Desktops. You can click the Configure link to restrict access to the view to only specified support representatives and support representative groups.

  Note: If you designate a view as Shared, it will appear to you under in the My Views folder; the My Views folder contains views that you have personally created via the View Designer.
- For **mySupport Views**: Click the Configure... link to select the customer groups and/or individual customers that can display the view.



If displaying settings for an existing view on which one or more charts have been defined, the charts appear in the **Associated Charts** dropdown along with an Edit link. You can select a chart and click the Edit link to display the chart settings in the Chart Designer.

The **For Records Pending Deletion** field appears for data sources that have pending deletion functionality (Assets, Companies, Config - Categories, Config - SLAs, Config - Support Representatives, Customers, and Survey Requests).

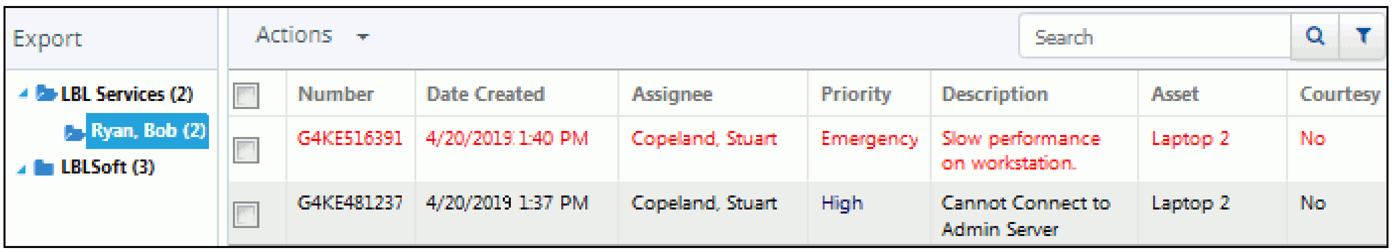


Records pending deletion have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes the record. Use the For Records Pending Deletion field to specify whether to include, exclude, or include only records pending deletion.

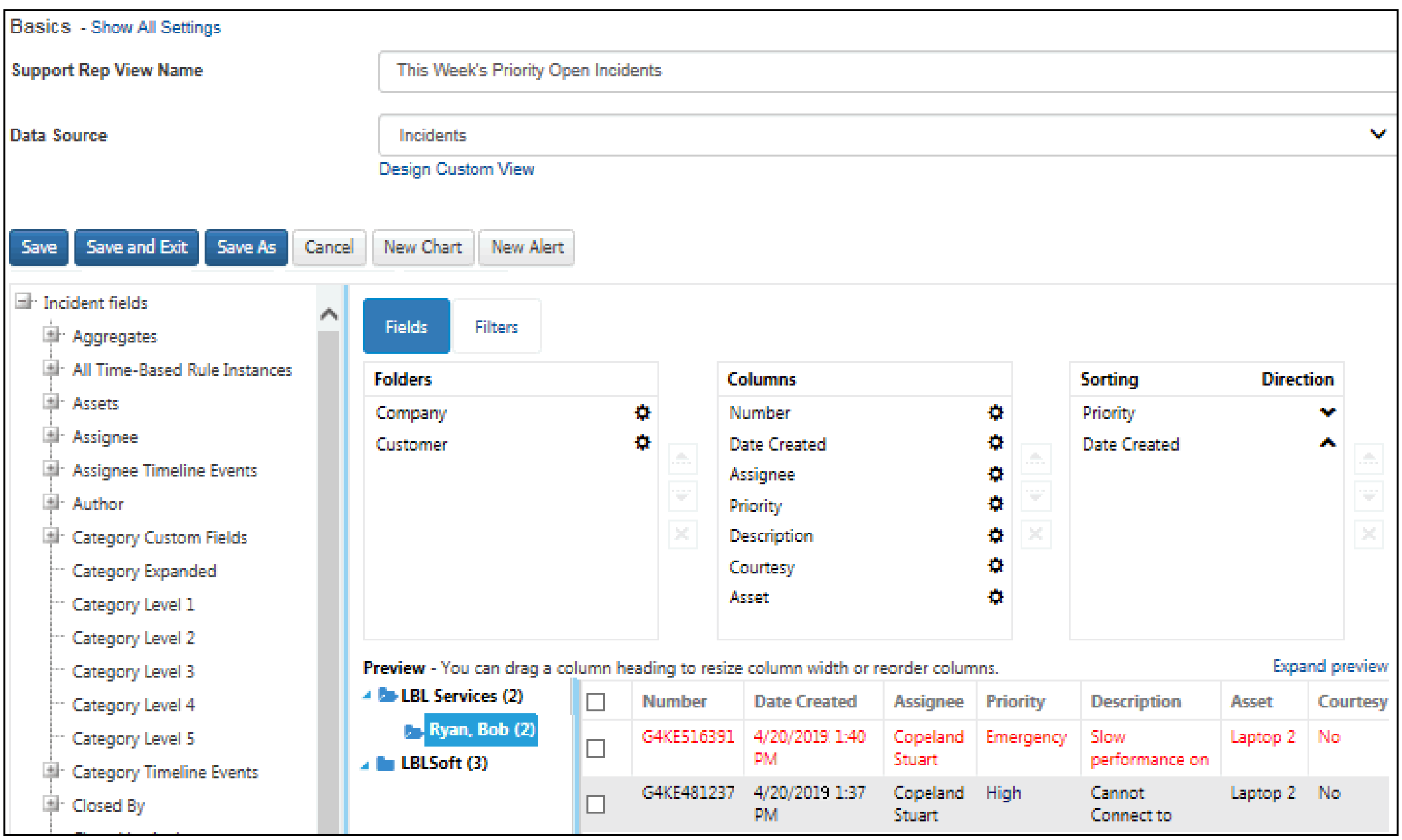
Configuring a Standard View

Standard views contain a few calculated fields (under the Aggregates field section) but do not enable you to configure calculated counts, percentages, sums, averages, minimums, and maximums on selected fields. See "Configuring a Report View" on page 13 for information on configuring a Report view.

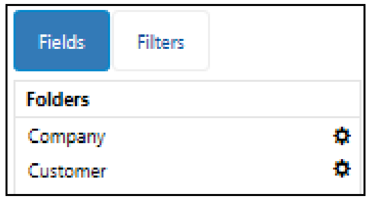
The following sections reference creation of a custom rep view named This Week's Priority Open Incidents:



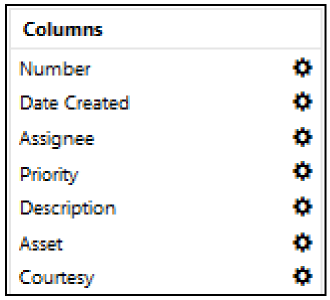
The data source fields available for the view appear in the navigator on the left; drag the applicable fields to the applicable section on the right. Note: The Date Generated field in the Incident source contains scheduled ticket information.



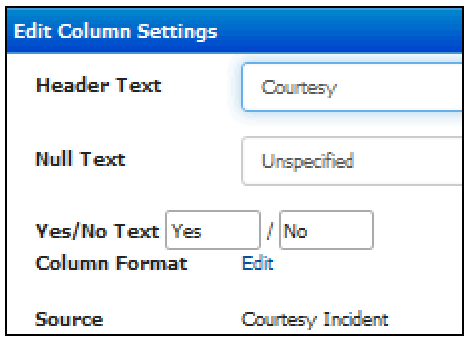
To sort the report and display a data source field as a folder on the left side of the view, drag the field into the **Folders** section. Any folders after the first folder will appear as a subfolder in the view.



Drag the data source fields that you wish to display as columns in the **Columns** section; columns listed will appear in order from left to right.



Select Configure next to a column field to format how it will appear in the view.

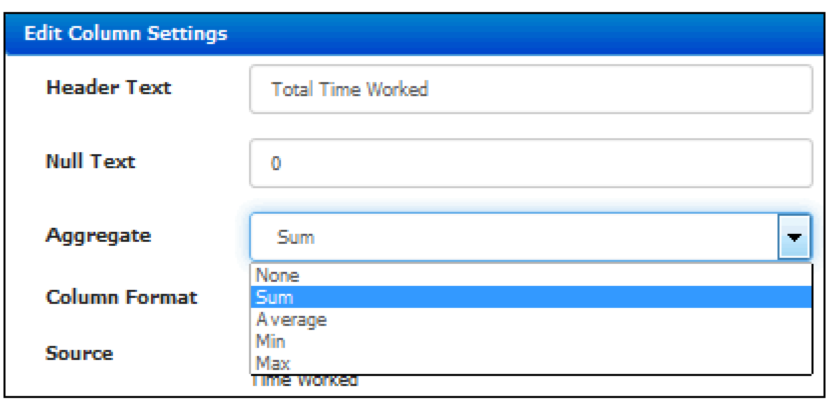


In the **Header Text** field, enter the text labeling the folder or column.

In the **Null Text** field, enter the text to appear when the data value in the view is nothing or zero.

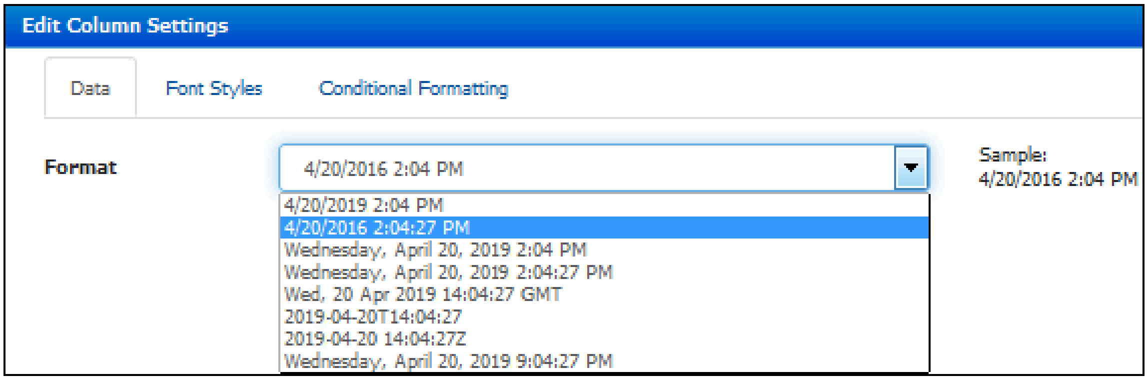
The **Yes/No Text** field appears for data source fields that have a True/False value; enter the text to appear for the True/False values.

The **Aggregate** field will appear for date and number fields; you'll have the option of specifying Sum, Average, Minimum, or Maximum. If any of these options are selected for a field, the applicable total calculated value for the folder will appear at the bottom of the view component as well as in view rows. Note that the calculated values that appear at the bottom of the view component will not be included in a view export.

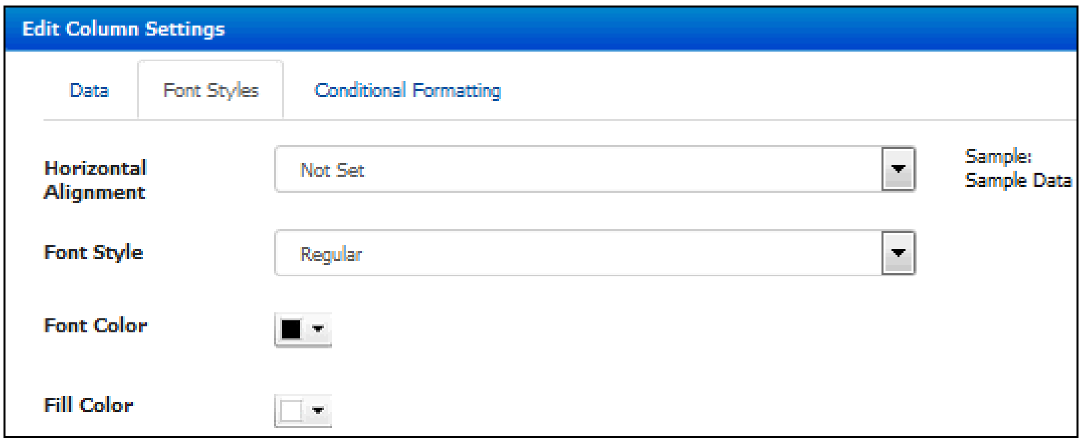


Click Edit in the **Column Format** field to configure the date format, font and alignment of values in an entire column, and the format of values that meet specified parameters.

- The **Data** tab appears for date fields; use it to configure display of the day, month, year, and time.

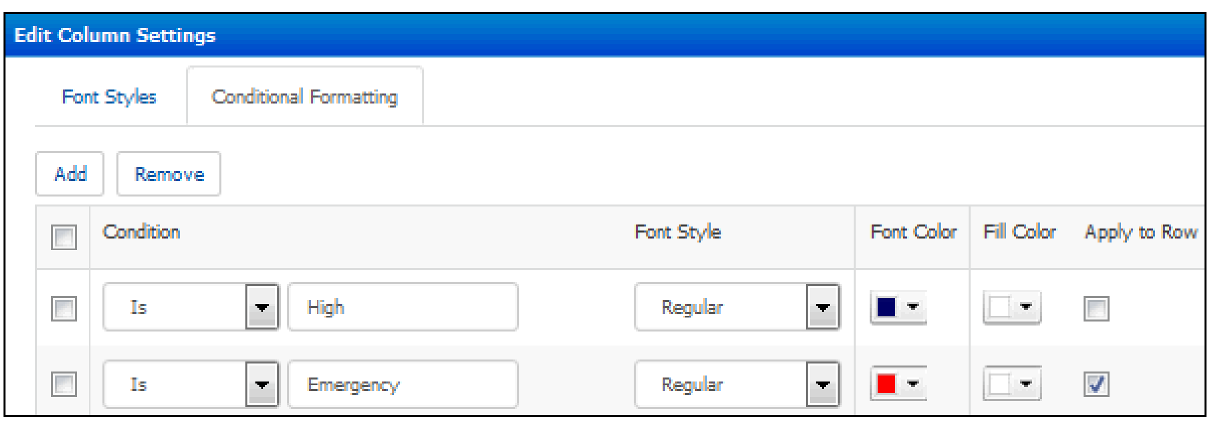


- Use the **Font Styles** tab to set the horizontal alignment, font style, font color, and fill color for all of the data in the column.

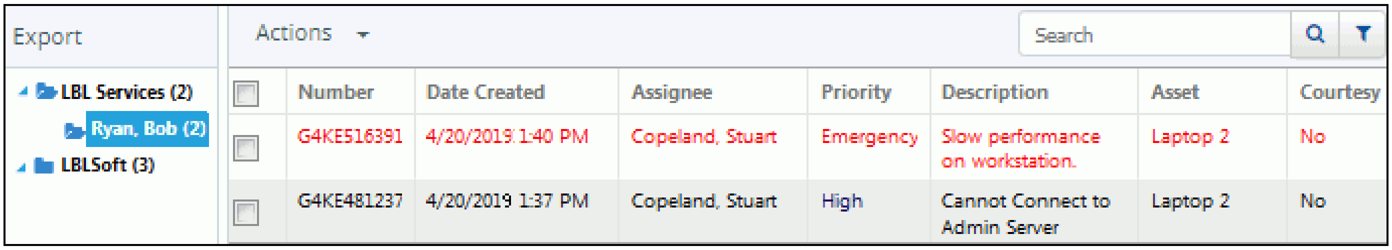


- Use the **Conditional Formatting** tab to base data formatting on set parameters. Select the comparison method, enter the value to be used with it, and then select the font style, font color, and/or fill color. If a value meets the specified condition, it will display in the specified format. Formatting will not apply to hidden columns.

  The Apply to Row option can be configured for more than one field in a row; if a row contains more than one field that meets its conditions, the formatting of the field that has the lowest column display order number will be used for all fields except those that have their own formatting. Entire row formatting only applies to fields that do not have individual formatting.



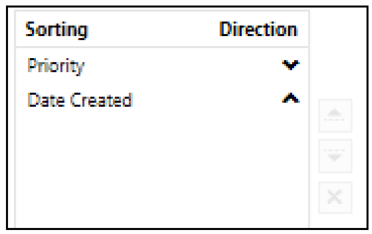
In this example these settings will appear as follows:



The **Source** field contains the original name of the data source field.

Setting the Sort Order and Direction

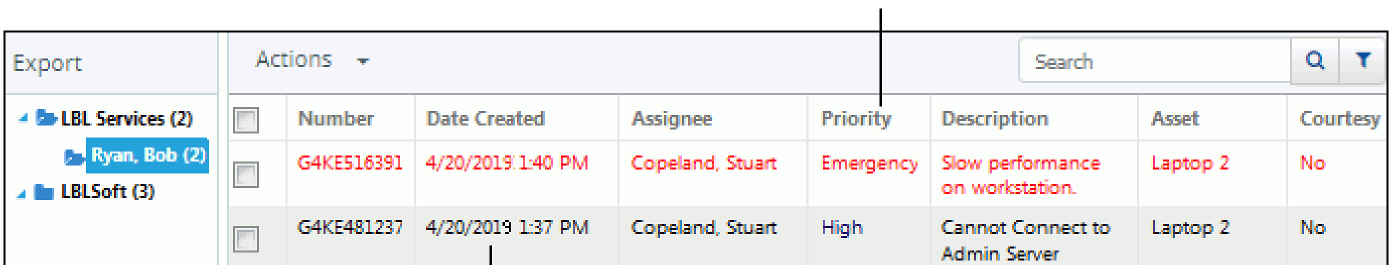
Drag the fields on which the view should be sorted into the Sorting section, in the order (from top to bottom) in which the fields should be sorted relative to the rest of the fields in the view.



- Ascending to sort field values in order from first to last/lowest to highest (alphabetically A-Z, lowest number to highest number, or in the case of Priority, Low to Emergency).
- Descending to sort field values in order from last to first/highest to lowest (alphabetically Z-A, highest number to lowest number, or in the case of Priority, Emergency to Low).

In the example below, incidents are sorted first by priority and then date created.

Sort Order 1: By Priority in Descending Order



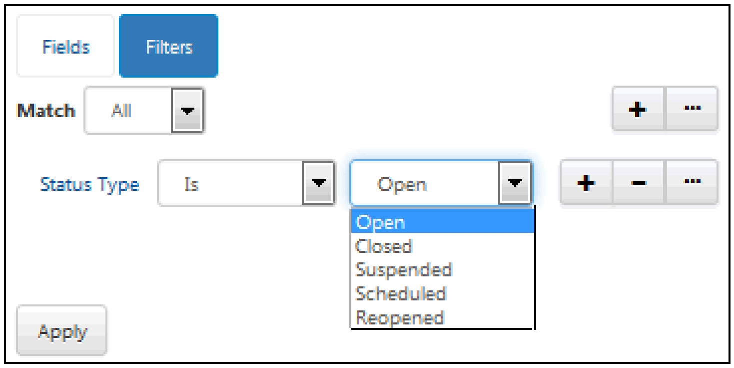
Sort Order 2: By Date Created in Ascending Order

Setting Filters

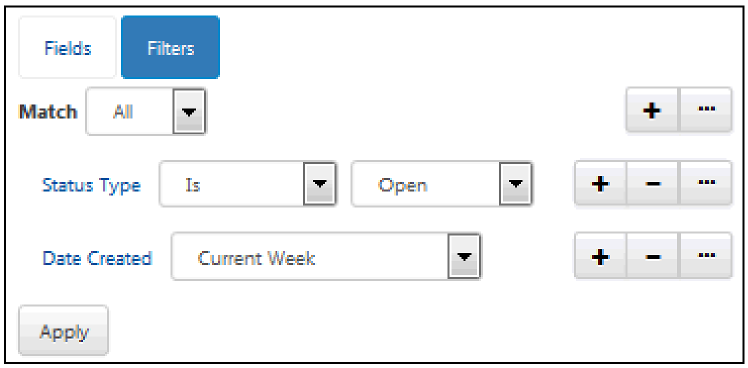
Use the Filters tab to set parameters for minimizing the amount of data that appears in the view. Select the field for which data should be minimized; comparison methods applicable to the field will appear in the dropdown. Select the comparison method and then enter the value to be used with it if applicable. Use the Match <*All/Any*> field to specify whether you want **every** <*field*> <*comparison method*> <*value*> 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*> <*comparison method*> <*value*> condition. 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.

Note: If a date field is selected, the Between comparison method does not include beginning and ending dates. The Current Week method is based on a Sunday through Saturday time frame.

In the following example, the view will only include incidents with an open status.



This example view also includes a filter on the date created; the view will only include incidents with a creation date within the current week.



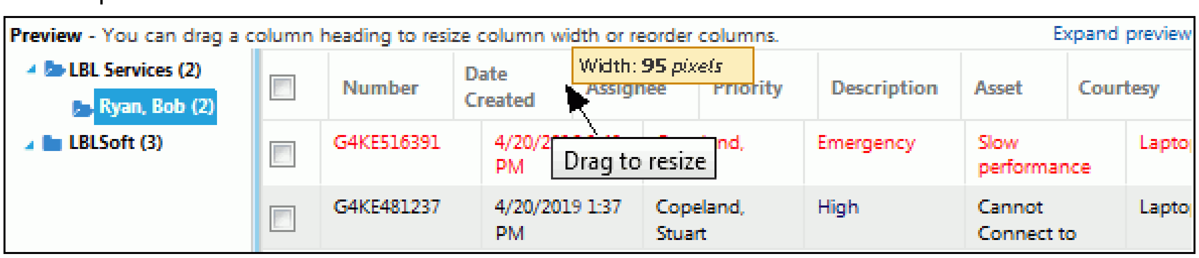
The view will save the filter immediately; click the Apply button to update the preview.

Previewing Your View

Use the Preview area to display your view; click the Expand link to display the view full-screen. **Note:** If using System BIOS fields in the Asset Scans - Inventory data source, some values may not be populated; some system vendors do not provide this data in the WMI system profile.

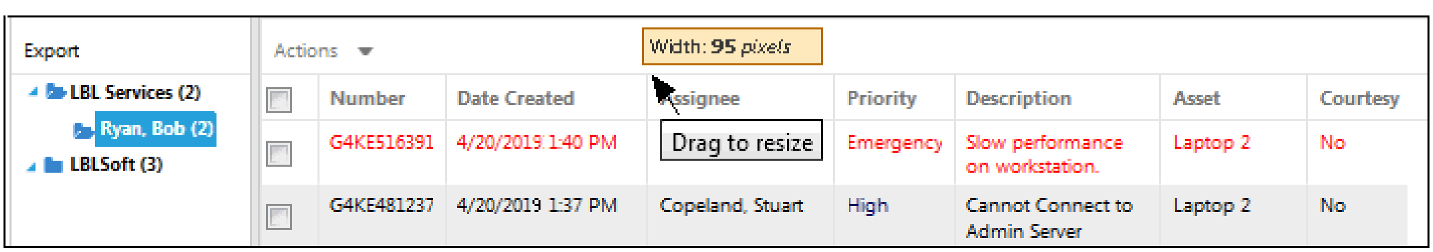
Working with Columns

To resize the width of a column, drag your cursor on the column edge to the desired width; the width in pixels will appear in a tooltip.



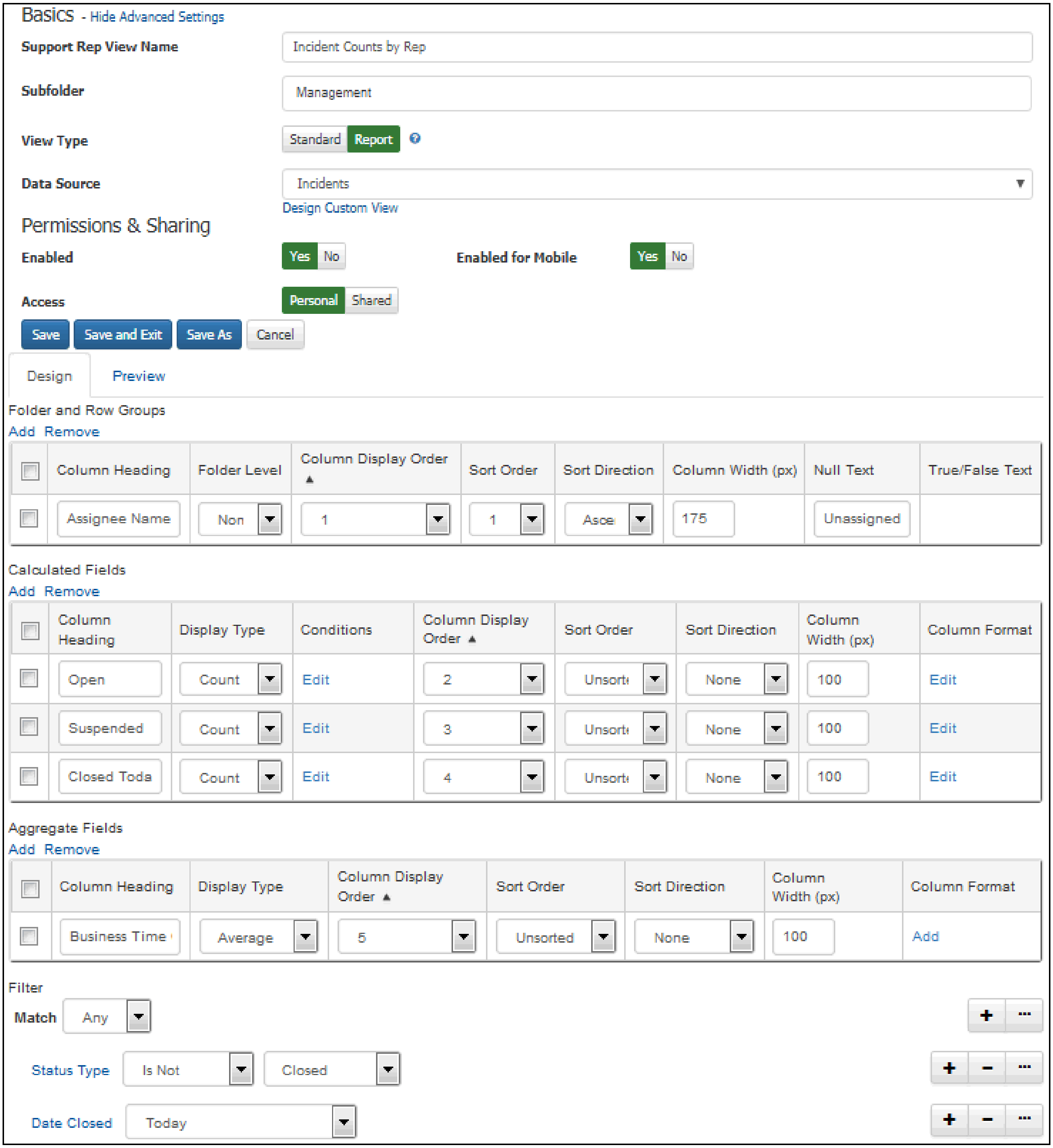
You can also resize columns when displaying views in a Desktop component.

Width appears in the view when you resize a column



Configuring a Report View

Report views include calculated counts, percentages, sums, averages, minimums, and maximums on selected fields. Many of the options used to configure sorting, display order, etc. are the same as in standard views, but you'll use a Folder and Row Groups section to configure folder level sorting, a Calculated Fields section to configure display of count and percentage values, and an Aggregate Fields section to configure display of sums, averages, minimums, and maximums.



The following sections reference creation of a custom rep view named Incident Counts by Rep:

Incident Counts by Rep

Actions

Assignee Name	Open	Suspend	Closed Today	Business Time Open
Alex, Robert	1	0	0	4 day(s) 17 hr(s) 11 mi...
Copeland, Stuart	6	0	4	5 day(s) 04 hr(s) 21 mi...
Kienle, Abby	1	0	0	2 day(s) 01 hr(s) 24 m...

Adding Folder and Row Groupings

Use the Folder and Row Groups section to select the fields on which the view is based; all other columns of counts and percentages, as well as sums, averages, minimums, and maximums will reference these fields. In this example, the view will display counts and the average time open for each assignee's incidents.

Folder and Row Groups
Add Remove

Column Heading	Folder Level	Column Display Order ▲	Sort Order	Sort Direction	Column Width (px)	Null Text	True/False Text
Assignee Name	Non	1	1	Asce	175	Unassigned	

You can use the Folder Level column to display a view field as a folder in the left navigator; enter the number for the position of the field.

Adding Calculated Fields

Use the Calculated Fields section to add a column with a count or percentage. Select fields for this section via the Add link and then click the Edit link in the Conditions column to set criteria for those fields. Use the Match <All/Any> field to specify whether you want every configured condition to be met, or any configured condition to be met. To configure a condition, click the Select a Field link and select a field; comparison methods applicable to the field appear in the dropdown. Select the comparison method and then enter the value to be used with it. Use the Add Condition + icon to add another condition, or the Add Condition Group ··· icon to include a set of conditions to be evaluated together in a group.

Calculated Fields
Add Remove

Column Heading	Display Type	Conditions	Column Display Order ▲	Sort Order	Sort Direction	Column Width (px)	Column Format
Open	Count	Edit	2	Unsort	None	100	Edit
Suspended	Count	Edit	3	Unsort	None	100	Edit
Closed Toda	Count	Add	4	Unsort	None	100	Edit

Match All

Status Type Is Closed

Date Closed Today

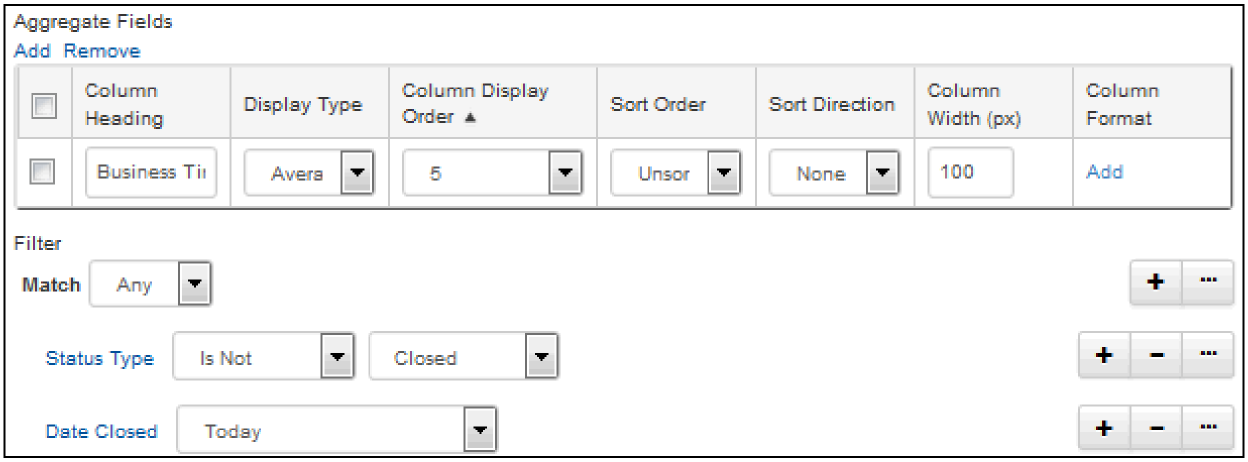
Finish

This example will include a count of the assignee's incidents with an open status, a count of the assignee's incidents with a suspended status, and a count of the incidents that were closed on the current day.

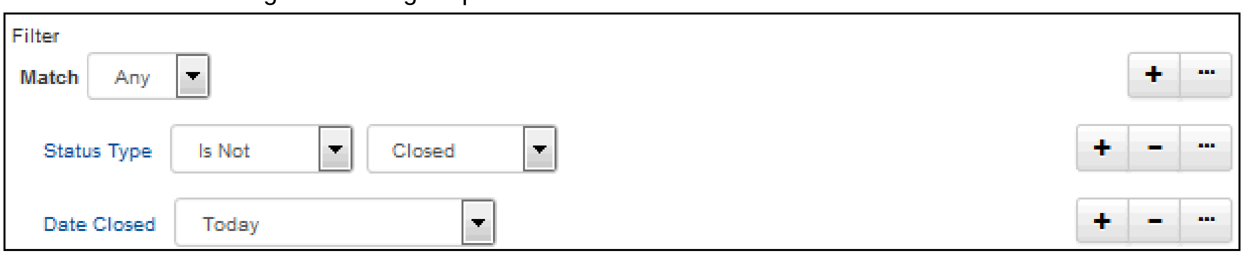
Adding Aggregate Values

Use the Aggregate Fields section to add a column that displays the minimum, maximum, sum, or average values for a selected field. Use the Add link to select fields for this section.

Use the Filter section to configure conditions for restricting and minimizing data in the entire view (including fields configured in the Aggregate Fields section). In this example, incidents that either have an open status or have been closed on the current day will be included in all values in the view.



In the Filter section, use the first Match <All/Any> field to specify whether you want every configured condition to be met, or any configured condition to be met. To create a condition, click the Select a Field link and select a field, aggregate value such as total time worked, or event attribute such as whether an incident has been acknowledged. Then select values applicable to the selected field. You can use the Add Condition Group icon to include a set of conditions to be evaluated together in a group.

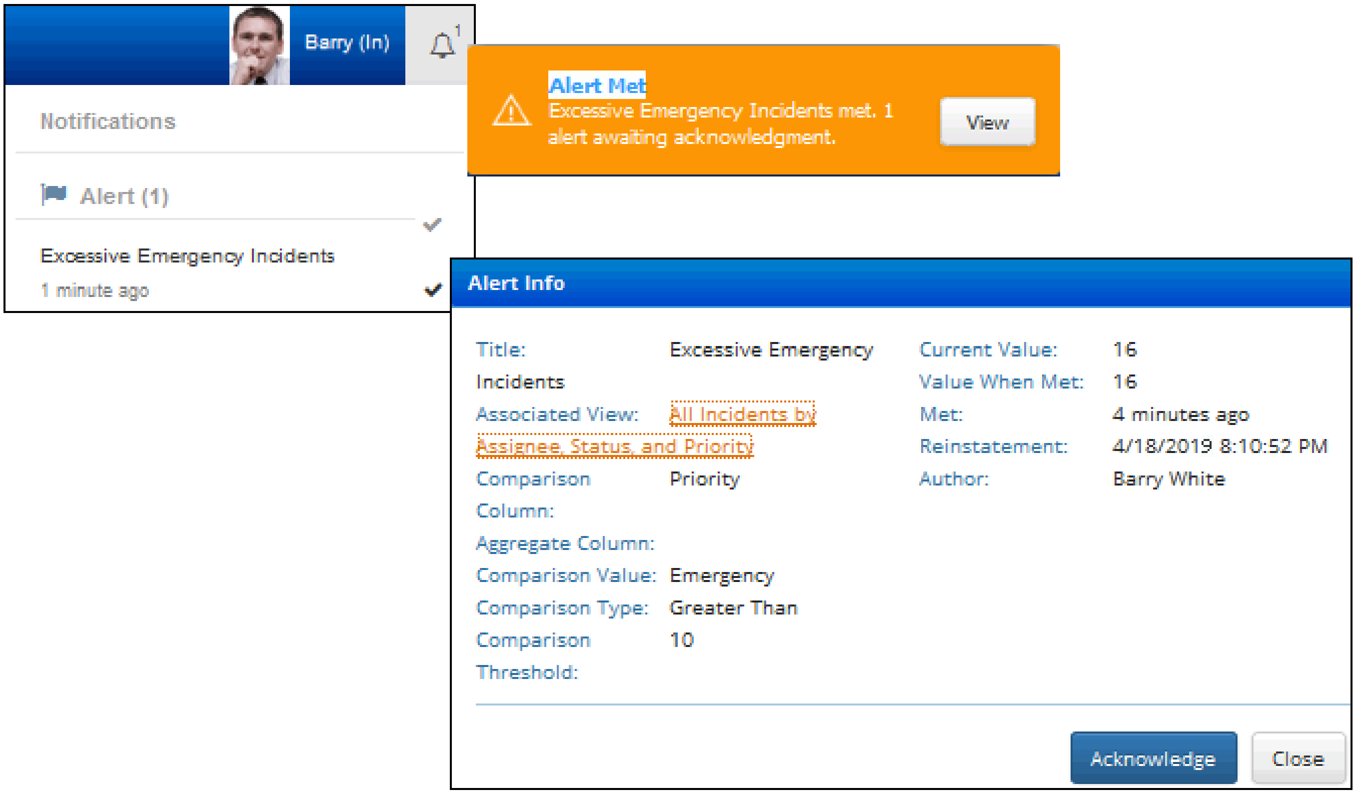


Ensure that the filter won't conflict with your count conditions, as the overall filter will override any defined count conditions. For example, if you have a count condition based on a date created within the current year but then define an overall filter for a date created equal to the current month, the column that has the condition of current year will only display the count of incidents for the current month because the overall filter will apply.

Creating Alerts

Alerts appear in a desktop notification (and popup if configured) when a view field reaches a certain threshold; for example, you can configure an alert to appear when a certain number of Emergency priority incidents has been reached. Alerts can also be sent via email to multiple support representatives and/or support representative groups.

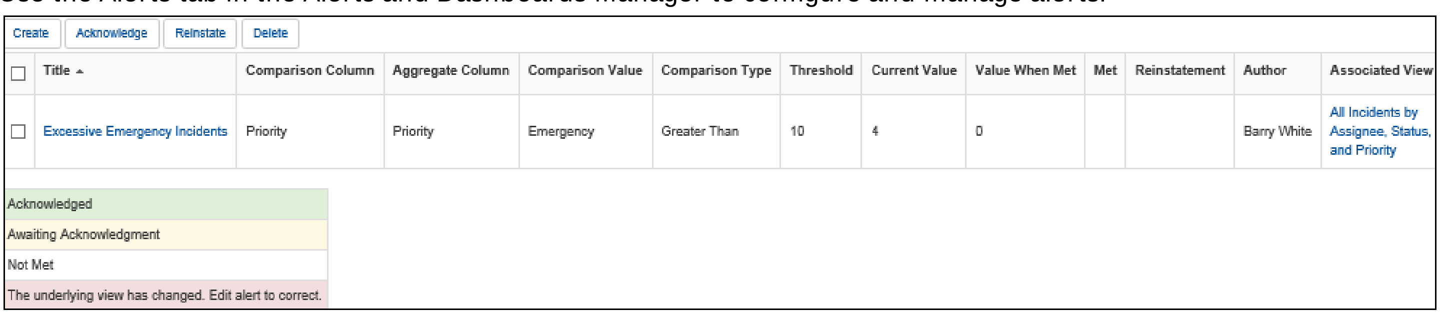
Select an alert desktop notification or the View button in the popup to display details. Acknowledge the alert to remove it from the Desktop notification list.



Support representatives with the Create Personal Alert permission can access the Alert Designer screen via the Alert and Dashboard Manager, Notifications menu, Alert option in View and Chart components, and the Alert button in the View Designer and Chart Designer. If you have the Edit Shared Alert permission, you can modify an alert that is configured to appear for multiple support representatives and/or support representative groups.

Alert criteria is evaluated based on the schedule of the Alert agent, so be sure to schedule the Alert agent in the Options and Tools | Administer | Agents screen.

Use the Alerts tab in the Alerts and Dashboards Manager to configure and manage alerts.



Create | Acknowledge | Reinstate | Delete

☐	Title ▲	Comparison Column	Aggregate Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
☐	Excessive Emergency Incidents	Priority	Priority	Emergency	Greater Than	10	4	0			Barry White	All Incidents by Assignee, Status, and Priority

Acknowledged
Awaiting Acknowledgment
Not Met
The underlying view has changed. Edit alert to correct.

You can select an alert checkbox and click:

- Acknowledge to remove the alert from the Desktop Notification Center.
- Reinstate to enable the alert criteria to be evaluated the next time the Alert agent runs.
- Delete to delete the alert.

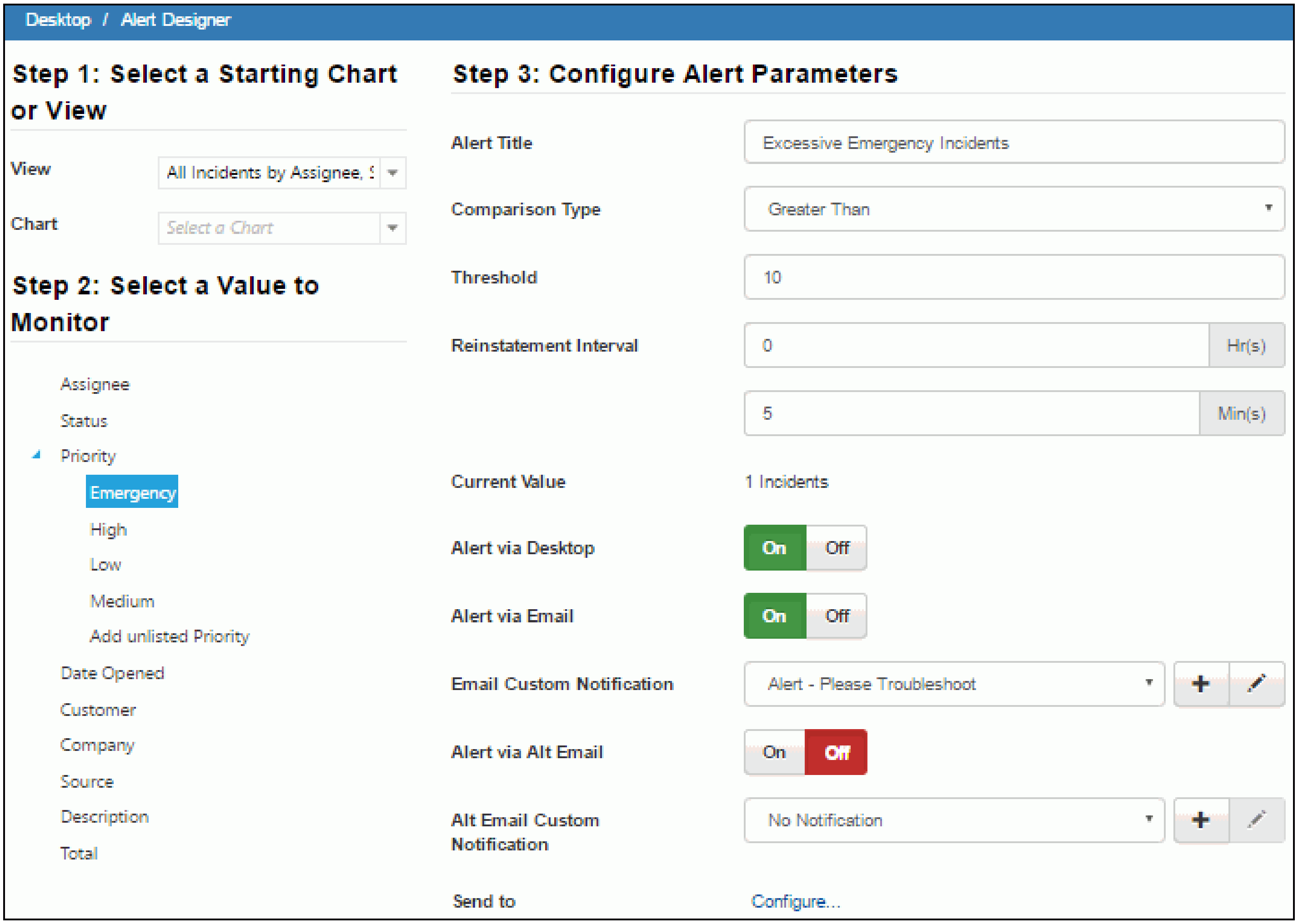
Use the Create button in the Alerts screen to display the Alert Designer.

Using the Alert Designer

Step 1 - As with charts, alerts are based on view values; use the View field or the Chart field to select the view or existing chart on which to base the alert. If you select an existing chart, the view and value on which it is based will appear.

The values in the view appear in the **Step 2: Select a Value to Chart** section; select the value to be used as the basis for the alert. For example, if configuring an alert to appear when a certain number of Emergency priority incidents has been reached, you would select Emergency.

Use the fields in the **Step 3:** Configure Alert Parameters section to specify the title, criteria, and notification options.



Alert Title - Enter a name for the alert.

Comparison Type - Select the condition that will use the value in the Threshold field to trigger the alert: Greater Than, Equal, Less Than, Less than or Equal, or Greater Than or Equal.

Threshold - Enter the number that will be used by the value in the Comparison Type field to trigger the alert.

Reinstatement Interval - Enter the number of hours and/or minutes after which the alert criteria should be made available to be checked by the Alert agent.

Current Value - The current number of view items appears; for example, if your view is based on incidents, the current number of incidents appears.

Alert via Desktop - Select On to display the alert in the Notification Center list (and popup, if configured in Preferences) of those configured in the Send To field:

- All support representatives (if none are selected)

- Only support representatives and/or support representative groups designated in the Send To field

Alert via Email - Select On to send an alert email to the email addresses of the support representatives selected in the Send To field (or all support representatives if none are selected.)

Email Custom Notification - Select No Notification to send no notification or select or create a custom notification to send to the email addresses of support representatives and/or support representatives in the groups designated in the Send To field (or all support representatives if none are selected.).

Alert via Alt Email- Select On to send an alert email to the alternate email addresses of the support representatives selected in the Send To field (or all support representatives if none are selected.)

Alt Email Custom Notification - Select No Notification to send no notification or select or create a custom notification to send to the alternate email addresses of support representatives and/or support representatives in the groups designated in the Send To field (or all support representatives if none are selected.).

Send To - This field appears if you have the Create Shared Alert permission. Click the Configure link to display a screen for selecting the support representatives and/or support representative groups that should receive the alert when the criterion is met. Note that if no support representatives are selected, the alert will be sent to all support representatives.

After you click Save, the alert appears on the Desktop as shown below:

Create | Acknowledge | Reinstate | Delete

	Title ▲	Comparison Column	Aggregate Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
☐	Excessive Emergency Incidents	Priority	Priority	Emergency	Greater Than	10	4	0			Barry White	All Incidents by Assignee, Status, and Priority

Acknowledged
Awaiting Acknowledgment
Not Met
The underlying view has changed. Edit alert to correct.

When an alert is triggered, the colors will change according to the legend.

Create | Acknowledge | Reinstate | Delete

	Title ▲	Comparison Column	Aggregate Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
☐	Excessive Emergency Incidents	Priority	Priority	Emergency	Greater Than	10	15	15	4/18/2016 6:25:09 PM		Barry White	All Incidents by Assignee, Status, and Priority

Acknowledged
Awaiting Acknowledgment
Not Met
The underlying view has changed. Edit alert to correct.

After acknowledging the alert, the alert appears as shown below:

Create | Acknowledge | Reinstate | Delete

	Title ▲	Comparison Column	Aggregate Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
☐	Excessive Emergency Incidents	Priority	Priority	Emergency	Greater Than	10	15	15	4/18/2016 6:25:09 PM	4/18/2016 8:10:52 PM	Barry White	All Incidents by Assignee, Status, and Priority

Acknowledged
Awaiting Acknowledgment
Not Met
The underlying view has changed. Edit alert to correct.

If the “The underlying view has changed. Edit alert to correct.” message appears, it is because an alert was based on a column in a view and then that column was later removed from the view. Select the alert in the Title column to change its settings.

Deleting Alerts

If you have the Delete Private Alert permission, you can delete an alert that you have created. If you have the Delete Shared Alert permission, you can delete an alert that is sent to support representatives and support representative groups (configured via the Send To field). Note that you will need to remove any support representatives and/or support representative groups in the Send To field before you can delete an alert.

Configuring Charts

Support representatives can view charts via the Chart or Gauge component on the Desktop, and customers can view charts via mySupport portals. You can restrict access to specified support representatives, customers, and/or groups. You can use the **Chart Designer** to create a chart or gauge for displaying data on any view field. You can create a gauge for charting one view field value or a bar, column, line, pie, or area chart for depicting multiple value types if applicable for a view field. mySupport charts have the same configuration fields as Rep charts, but can only appear on the mySupport portal.

You can use the **Work Item Chart Designer** to create a chart that will display data in area, stacked area, bar, stacked bar, column, and stacked line format for tracking incidents, problems, changes, and purchase requests for a specified time frame. Note that work item charts cannot be included on mySupport portals. See "Using the Work Item Chart Designer" on page 23 for more information.

Using the Chart Designer

To create a chart for display on the **Desktop**, select Desktop Content | Chart Designer on the Desktop Content menu or Rep Chart on the Create menu in the Content Manager. To create a chart for display on a **mySupport portal**, select mySupport Content | Chart Designer on the Desktop Content menu or mySupport Chart on the Create menu in the Content Manager.

To get started, you'll need to select the view on which to base the chart. The values in the selected view will appear under Step 2; select the value that you wish to monitor. If it is an existing chart, you can click the Edit link to open the View Designer to change the selected view to incorporate the value you wish to monitor.

Use the dropdown in the View field to select a view.

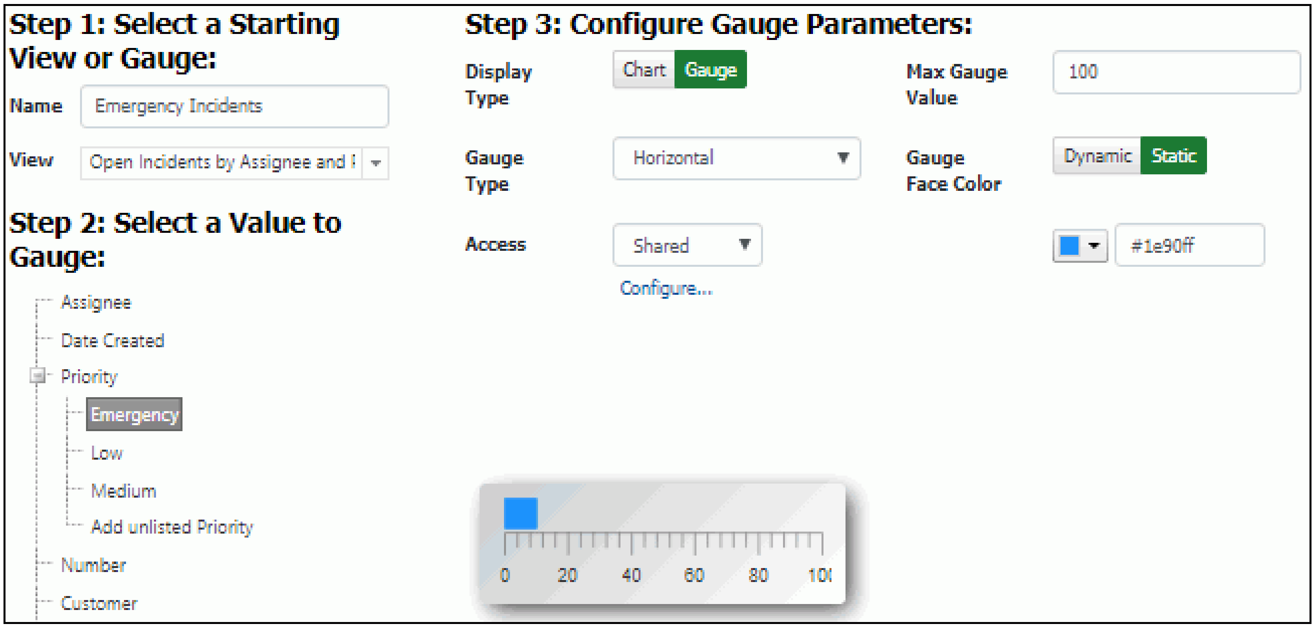
The values in the view appear under Step 2; it will change depending on the display type. If you select a Chart display type, the chart will depict multiple types of values (for example, all types of priority).

Use the fields in the **Step 3: Configure Chart Parameters** section to design the chart.

Display Type - Select one of the following:

- Chart to depict multiple types of values (for example, all types of priority) in the format of a bar, column, line, pie, or area.

- Gauge to depict the amount of a specific value (for example, the number of emergency priority incidents) in the format of a thermometer or dial. You can select one of the following: Horizontal, Vertical, Full, Half, and Quarter.



Chart/Gauge Type - If Chart is selected in the Display Type field, you can select one of the following: Bar (horizontal), Column (vertical), Line, Pie, or Area. If Gauge is selected in the Display Type field, you can select one of the following: Horizontal, Vertical, Full, Half, Quarter, Horizontal Thermometer, and Vertical Thermometer.

Label Rotation (for charts) - Select the positioning of the labels: 0, 45, or 90 degrees.

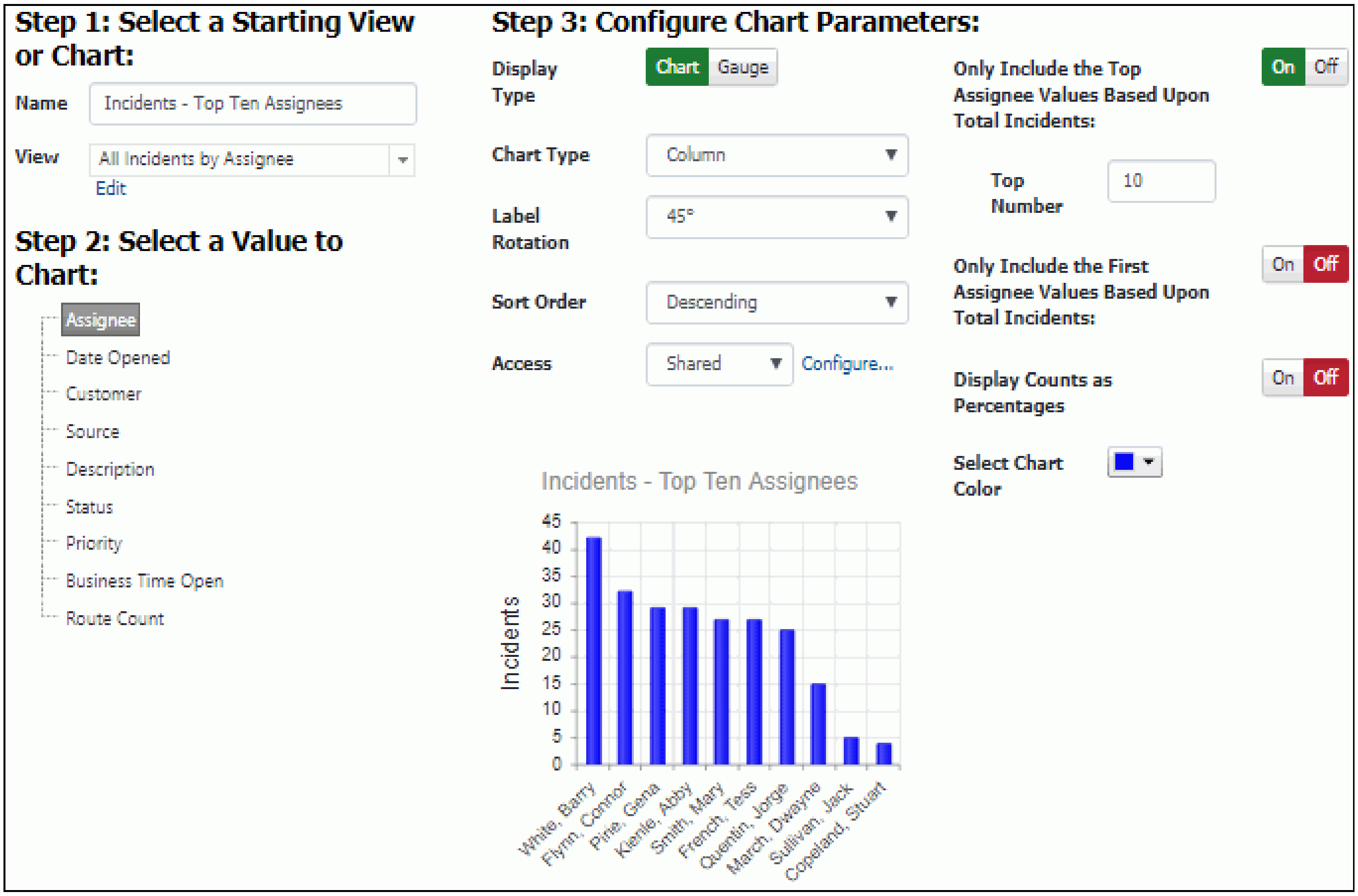
Legend Position (for pie charts) - Select the positioning of the labels for pie charts: Top, Bottom, Left, or Right.

Sort Order (for charts) - Select the direction in which to sort the chart: Ascending or Descending.

Access - Select:

- Select Myself to keep the chart or gauge private so only you can display it on your Desktop.
- Select Shared to make the chart or gauge available for other support representatives for displaying on their Desktops.

Only Include the Top (Entity) Values Based on Total (View Entity) - If Chart is selected in the Display Type field, select On to only include a specified number of the top grouping. Then enter the number. For example, enter 10 to only include the top ten assignees.



Only Include the First (Entity) Values Based Upon Total (View Entity) - If Chart is selected in the Display Type field, select On to only include a specified number of values, from the start of the list according to the specified sort order. Then enter the number. For example, if selecting incidents by followup date in descending order, enter 6 to only include the first 6 dates from newest to oldest date.

Select Chart Color - Select the color to display for the selected value. You can select multiple colors for pie charts.

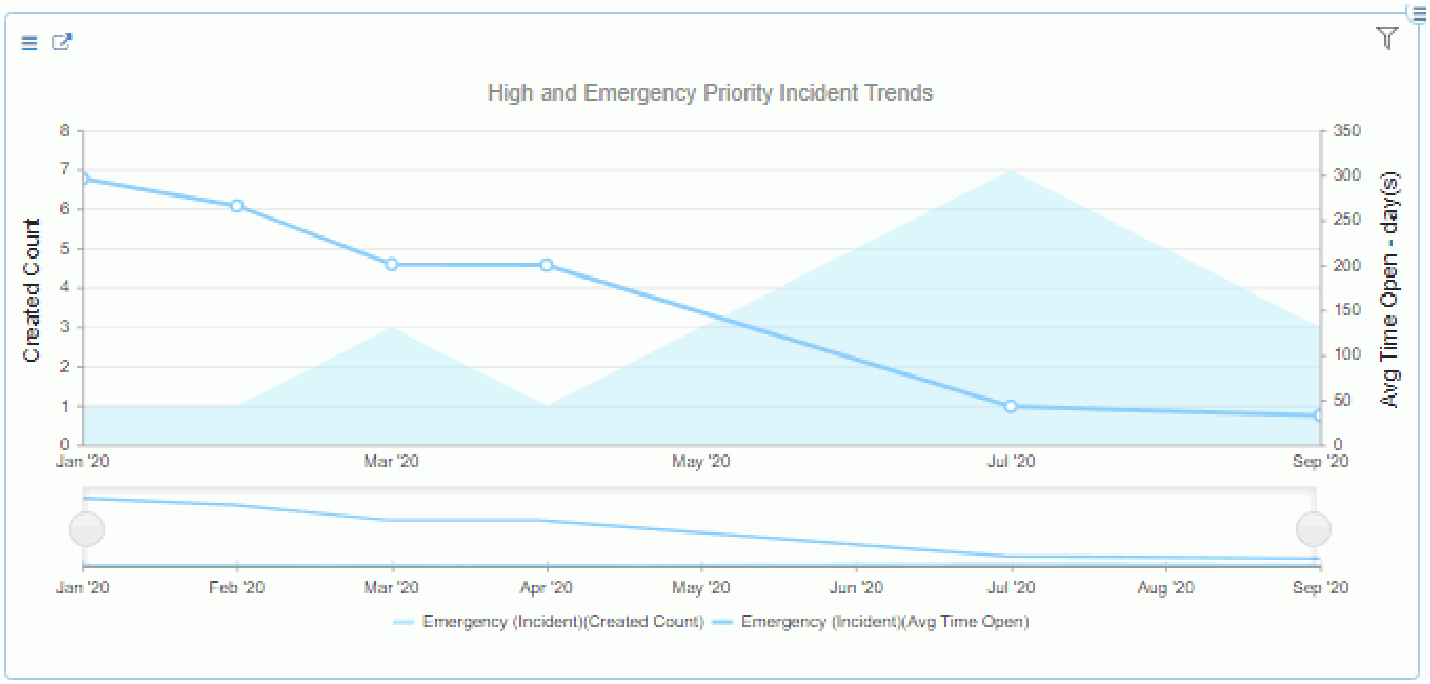
Max Gauge Value (for gauge charts) - Enter the number to appear at the top of the gauge.

Gauge Face Color (for gauge charts) - If Full, Half, Quarter, Horizontal Thermometer, or Vertical Thermometer is selected in the Chart Type field, select:

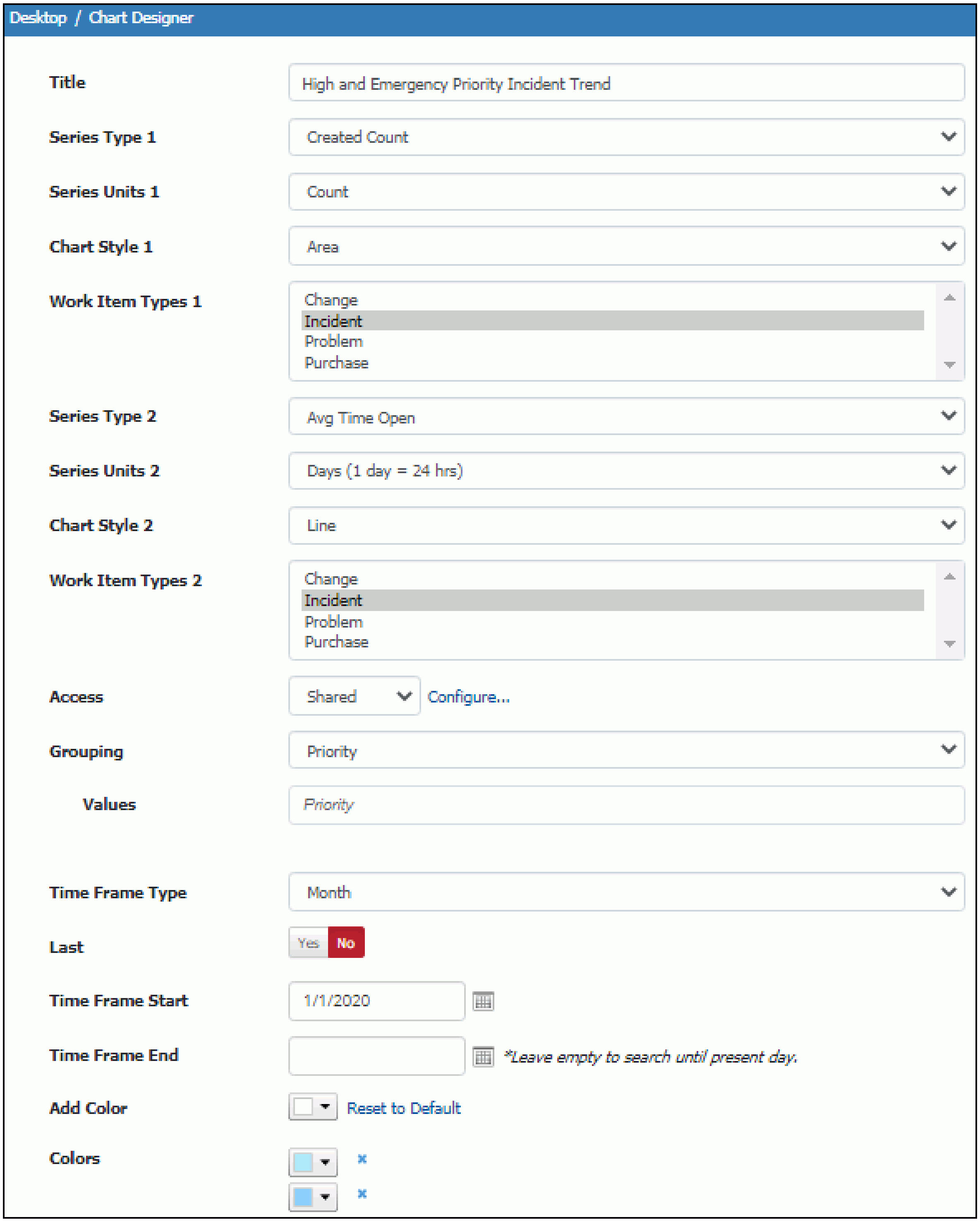
- Static to display a specified color for the gauge; the gauge will remain this color as the amount of the selected value changes. You can choose the color from the color selector or enter the hexadecimal color code.
- Dynamic to display a gauge that will change color (calculated along the color scale from blue to red) every time the amount of the value changes. If the current value exceeds the number entered in the Max Gauge Value field, the gauge will remain red.

Using the Work Item Chart Designer

You can use the Work Item Chart Designer to create a chart that will display data in area, stacked area, bar, stacked bar, column, and stacked line format for tracking incidents, problems, changes, and purchase requests for a specified time frame. Note that work item charts cannot be included on mySupport portals. To create a work item chart, select Desktop Content | Work Item Chart Designer on the  Desktop Content menu or Rep Work Item Chart on the Create menu in the Content Manager.



Saved Rep Work Item charts will appear in the Work Items module in the Content Manager and in the Work Items folder in the Chart or Gauge component configuration dialog.



Title - Enter a title for the chart.

Series Type 1 - Select the type of calculation for the first set of criteria: Created Count, Closed Count, Total Time Open, Average Time Open, Total Time Worked, Average Time Worked, Total Business Time Open, or Average Business Time Open. Note that the Total Business Time Open and Average Business Time Open options only apply to incidents.

Series Units 1 - This field applies to all options except Count in the Series Type 1 field. Select the unit of time for the time-based option selected in the Series Type 1 field: Minutes, Hours, or Days (1 day - 24 hours).

Chart Style 1 - Select the format for the first set of criteria: area, stacked area, bar, stacked bar, column, line stacked, or scatter line. Note that a second series is not supported for the bar and bar stacked chart styles.

Work Item Types 1 - Select the work item record types to chart for the first set of criteria.

Series Type 2 - Select the type of calculation for the second set of criteria: Created Count, Closed Count, Total Time Open, Average Time Open, Total Time Worked, Average Time Worked, Total Business Time Open, or Average Business Time Open. Note that the Total Business Time Open and Average Business Time Open options only apply to incidents, and a second series is not supported if the bar or bar stacked chart style is selected for the Series Type 1.

Series Units 2 - This field applies to all options except Count in the Series Type 1 field. Select the unit of time for the time-based option selected in the Series Type 2 field: Minutes, Hours, or Days (1 day - 24 hours).

Chart Style 2 - Select the format for the second set of criteria: area, stacked area, bar, stacked bar, column, line stacked, or scatter line.

Work Item Types 2 - Select the work item record types to chart for the second set of criteria.

Access - Select:

- Personal to enable only you and those with the Edit Other Personal Charts permission in their Support Representative Profile record to add the chart or gauge to a Desktop dashboard.
- Shared to make the chart or gauge available for other support representatives to display on their Desktop dashboards.

Grouping - If applicable, select the specific field and field value(s) to chart.

Time Frame Type - Select the duration on which to chart the selected field values.

Last - Select Yes to include data for past time frame intervals and then enter the number of intervals in the Last Interval field.

Time Frame Start/End - This field appears if No is selected in the Last field. Select the dates for the time frame on which data should be presented.

Add Color/Colors - The Colors field includes the colors to display for the values in the Values field; the order from top to bottom will correspond to the order in the Value field. Use the Add Color field to select a color to add to the list.