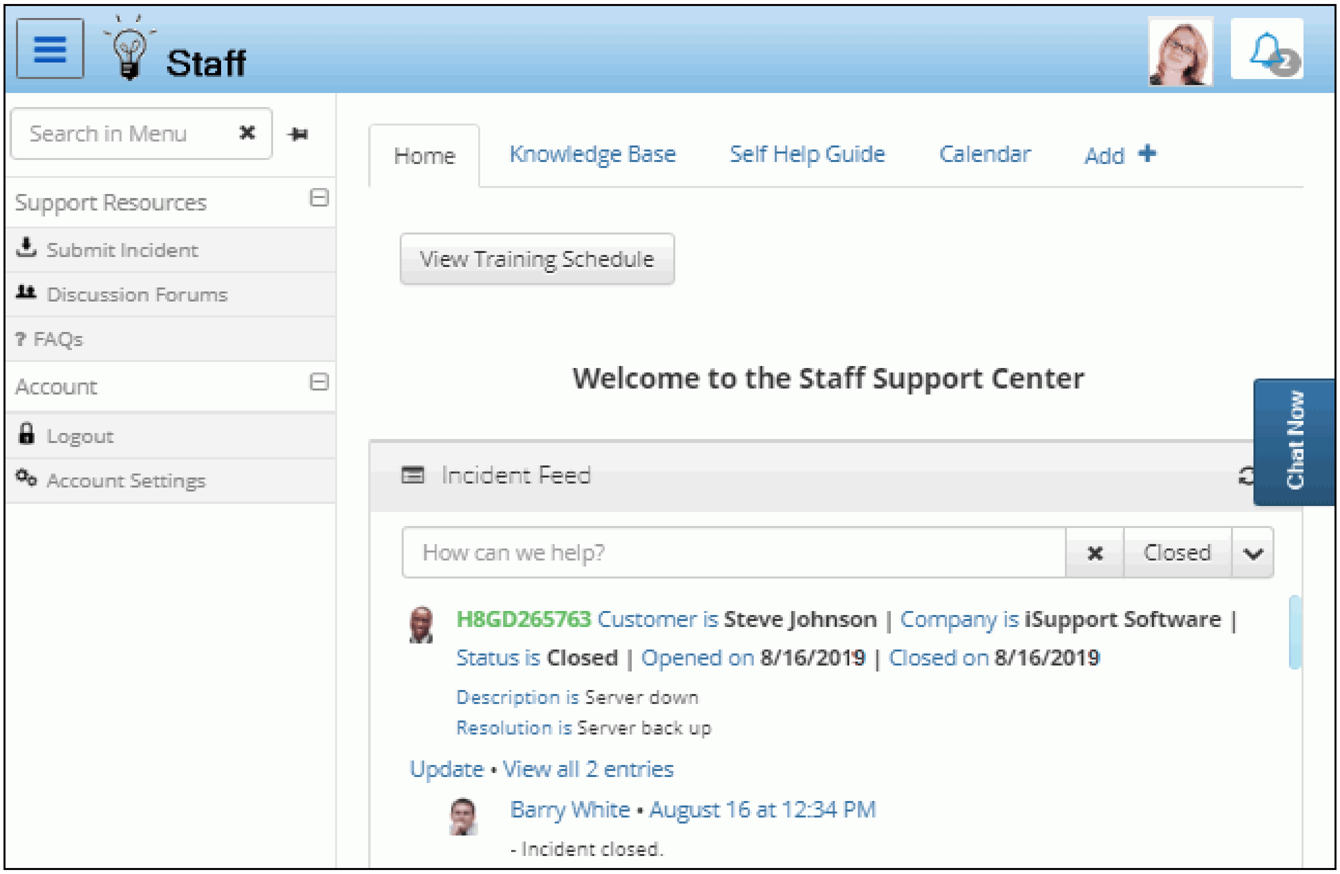
Configuring mySupport® Functionality

iSupport® mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more.



Everything on a mySupport portal is configurable, including all label and header text. You can configure the feature links, fields that appear for viewing and submitting records, etc. An unlimited number of interfaces can be configured to target different customer groups.

Basic Configuration

- Ensure that the mySupport functionality was installed during the iSupport installation. If using the mySupport Chat feature, enable mySupport Chat and Awareness/Awareness Chat functionality via the Core Settings | Feature Basics screen.
- Use the Core Settings | mySupport | **Portals** screen to create, copy, and configure the dashboards, navigator, theme, and option set for a portal. See "Configuring mySupport Portals" on page 46 for more information. Select Configure at the top of the screen to configure:
  - An **option set**, which includes the settings that control how features behave, as well as settings for global features such as authentication. See "Configuring mySupport Options" on page 57. You can also create different display and submit layouts for work item functionality on a set of mySupport options via the mySupport Layout links included for each module (incident, knowledge, problem, change, purchase, and service contract).

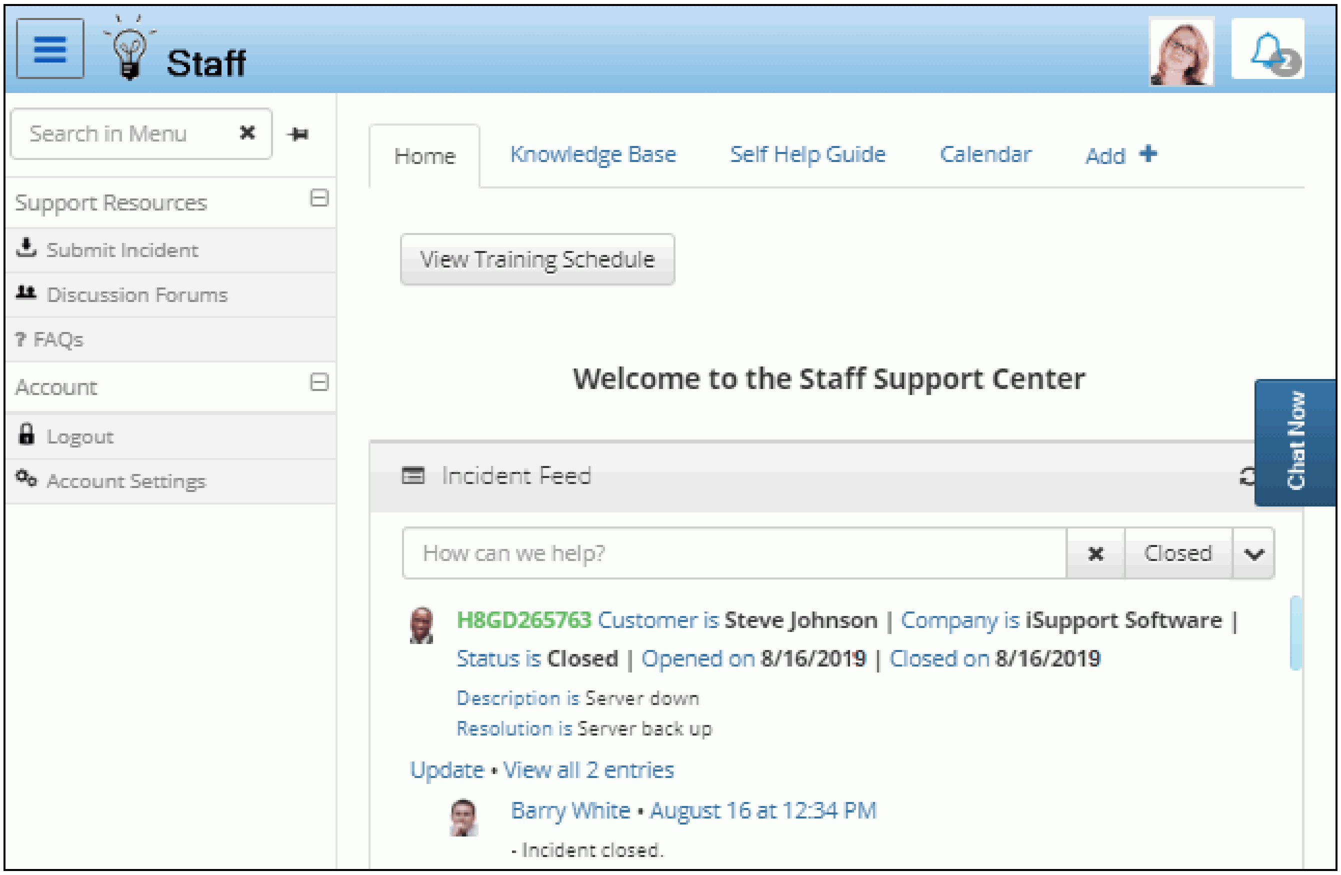
  - A **mySupport theme** which includes the colors, fonts, and header image; themes are created and customized using Bootstrap technology. A default set of themes is included in iSupport for you to use, copy, and modify. Themes are associated with option sets, but you can save themes for use with other option sets. See "Creating and Modifying a mySupport Portal Theme" on page 119 for more information.
  - A **mySupport navigator** which enables access to features and content; it can appear as a list of links on the left side of a portal, as a set of icons in a navigation tile component, or both. Navigators are associated with option sets, but you can save navigators for use with other option sets. iSupport features can also be accessed via buttons in a component; see "Configuring Navigator Links, Designer Components, and Buttons" on page 86.
- Use the Core Settings | mySupport | **Manage Portal Items** screen to copy and delete option sets, themes, navigators, corporate dashboards, customer dashboards, news feeds, and calendars. See "Managing Portal Items" on page 122.

Optional Configuration

- Assign one or more mySupport portal URL definition/options combinations to **customers**, **companies**, and **groups**. The Order of Precedence field in the mySupport Portal settings determines the options that will appear when the URL is accessed. Content may not appear to customers if group access is enabled for a feature or settings in the customer's Customer Profile record to prevent access to a feature.
- Configure **Microsoft® Windows-based authentication** to bypass the Login prompt. See "Setting Up Microsoft Windows-Based Authentication for a mySupport Portal" on page 126 for more information.
- If you are not using Microsoft® Windows-based authentication with iSupport, use the Options and Tools | Administer | Security | **Customer Security** screen to enable password security options and configure locks to prevent a customer who has exceeded a specified number of failed login attempts from logging in. See "Configuring Password Complexity, Expiration, and Login Locks for Customers" on page 138.
- You can enable CAPTCHA and multi-factor authentication for enhanced security after customers log in. See "Configuring Login and Password Options" on page 59.
- You can enable a **third party application identity provider** (such as Shibboleth and Otka) to pass user credentials so that a user can sign in to mySupport with the same credentials that they use to log into other applications. See "Setting Up Single Sign On Authentication for mySupport" on page 133 and "Creating an Authentication Application for Single Sign-on" on page 134.
- If you need to create additional mySupport portals, see page 126.
- Create different **display and submit layouts** for work item functionality on a set of mySupport portal options via the mySupport Layout links included for each module (incident, knowledge, problem, change, purchase, and service contract). See "Configuring Screen Layouts" on page 144.
- In the Core Settings | mySupport | Portals screen, create a mySupport options set for **mobile devices** and assign it to a customer, company, or customer group. You can configure Easy Submit functionality which enables customers to use an older version of a mobile device that cannot render HTML5 to submit incidents via a simple interface with only a description field and any other fields required for authentication. Use the Core Settings | mySupport | Easy Submit Devices screen to configure Easy Submit functionality. See "Accessing the mySupport Portal on a Mobile Device" on page 156.
- Use the Options and Tools | Integrate | **Social Media Integration** and **SMS Carrier** screens to configure authentication via Facebook and LinkedIn, and work item notifications via SMS and Twitter. Twitter integration is also used for the Headline/Problem Publish to Twitter feature on the Rep Desktop. See "Configuring SMS Carriers" on page 159 and "Configuring Social Media Integration" on page 161.
- Customize help using the **Resource Editor** in the Utilities subdirectory; it enables you to customize text on a mySupport portal. See "Using the Resource Editor to Customize a mySupport Portal" on page 123.
- Use the Knowledge Management Feedback tab in Feature Basics to include a **feedback question** and two response choices at the top of the Knowledge Entry screen. See the online help for more information.

mySupport Feature Overview

mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more.

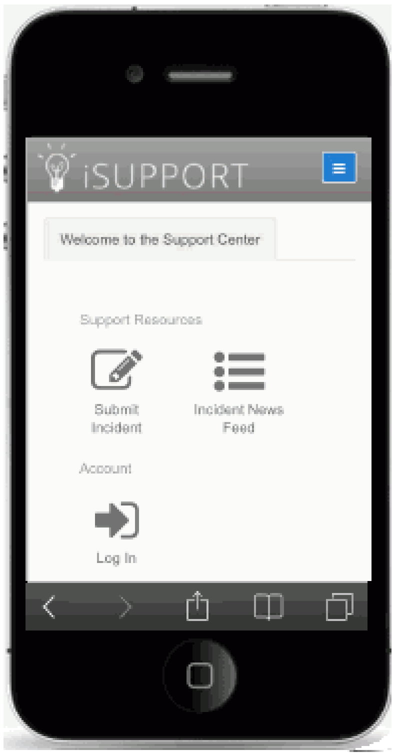


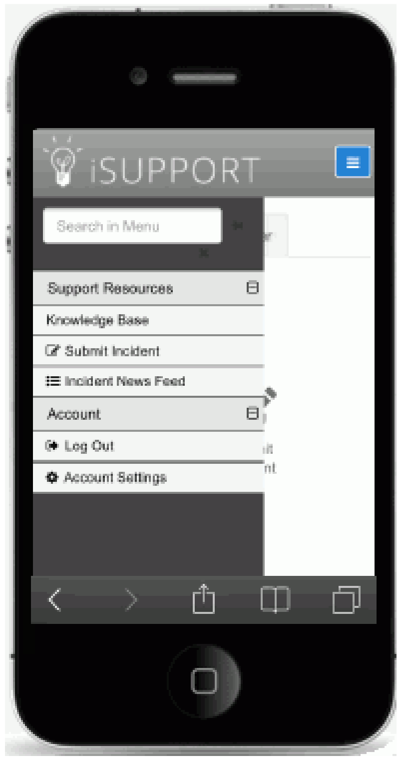
Everything on a mySupport portal is configurable, including all label and header text. You can configure the feature links, fields that appear for viewing and submitting records, etc. An unlimited number of interfaces can be configured to target different customer groups. iSupport includes several themes; a theme can be easily customized. You can also create different display and submit layouts for work item functionality on a set of mySupport options via the mySupport Layout links included for each module (incident, knowledge, problem, change, purchase, and service contract).

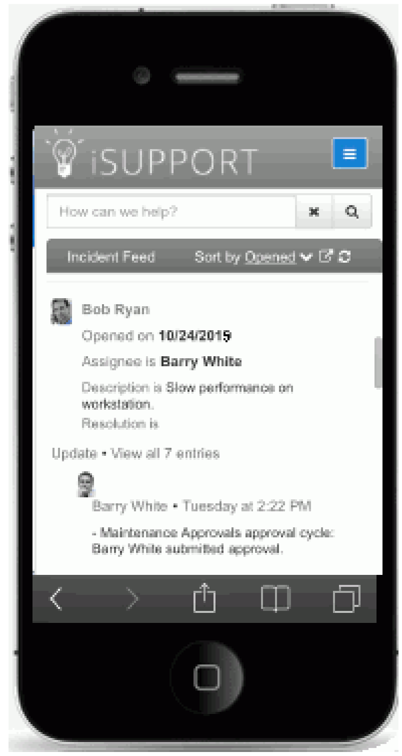
The Resource Editor in the Utilities subdirectory enables you to customize and translate the text that appears for elements on the mySupport portal such as labels, messages, and the Help page.

You can enable customers to add and customize dashboards and components that you make available via Options.

mySupport portals can also be accessed via a mobile device; you can create a mySupport options set for mobile devices and assign it to a customer, company, or customer group.







Features

Follow the links below for information on mySupport Portal features; see "Configuring mySupport Portals" on page 46 for configuration information.

General

Login and Logout - see page 5.

Home - see page 26.

Account Settings - see page 7.

Surveys - see page 11.

Work Item Submission

Easy Submit - see page 12.

Incident/Change/Purchase Submit - see page 13.

Incident/Change Template and Hierarchy Template - see page 14.

Service Catalog/Service Catalog Section - see page 14.

Work Item Viewing and Searching

Charts - see page 16.

Feeds (Global, Incident, Problem, Change, Purchase, Service Contract, Service Request) - see page 17.

Search/Global Search - see page 19.

Incidents/Changes Pending My Approval - see page 21.

My Archived Incidents News Feed - see page 21.

Informational Elements

Communication Features

General

Login (Authentication)

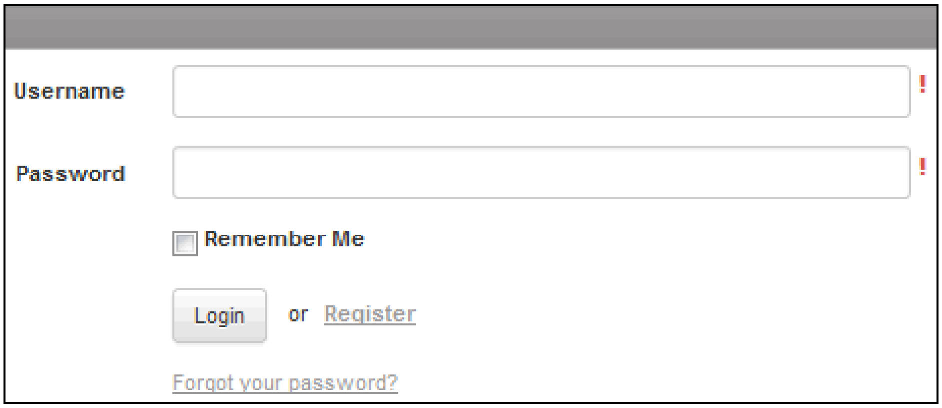
The types of access that can be configured for a mySupport site are as follows:

- No required authentication - customers can access all features but must enter a name and email address in order to submit or view incidents and changes; a Customer Profile record will be created after their first incident is submitted.
- Required authentication for the entire mySupport site; if customer or company groups have been created, access can be limited according to group.
- Required authentication for submitting and viewing incidents and changes and submitting a discussion post. If a customer has not logged in, the Reply and Create Discussion Post links will not appear and a login dialog will appear when the customer attempts to submit or view an incident or change.

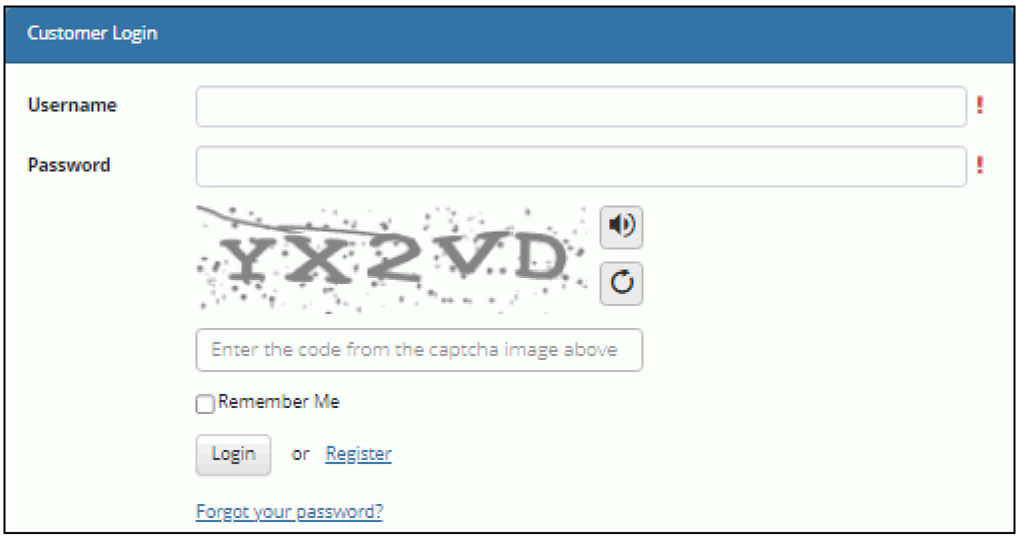
A mySupport options set can be configured as Public Knowledge Only; it will only include a Knowledge page and no access settings will apply.

Authentication can be controlled via Microsoft Authentication or iSupport; a mySupport login can be included in each customer's Customer Profile record or customers can use Account Settings to link an account for authenticating automatically via Facebook or LinkedIn®.

If using iSupport authentication, the login dialog can be configured to include a Remember Me option, Register option, and/or Forgot Password option. (The Password field in the login dialog is case sensitive).



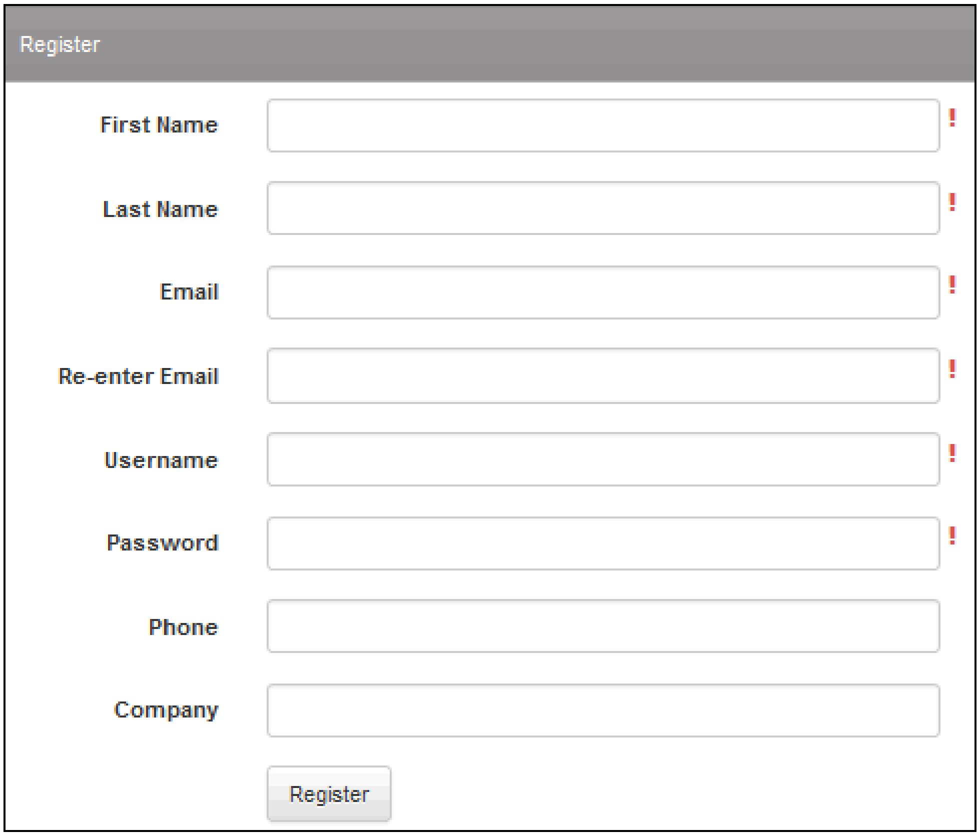
A CAPTCHA image with a code can be included on login-related dialogs as well as the Calendar RSVP Login and Calendar RSVP Register dialogs that appear on mySupport when authentication is not required and a customer is not logged in.



Multi-factor authentication can enable a code to be sent to a customer via SMS or email after login in order to access iSupport.

A third party application identity provider (such as Shibboleth and Otka) to pass user credentials so that a user can sign in to mySupport with the same credentials that they use to log into other applications.

- The **Register** option enables a customer to enter contact and login information; a Customer Profile record will be created after completion. A customer will not be able to register with the same email address and login name as another customer.



  Registration review can be configured; it will disable mySupport access in the customer's Profile record and create an incident via a template.

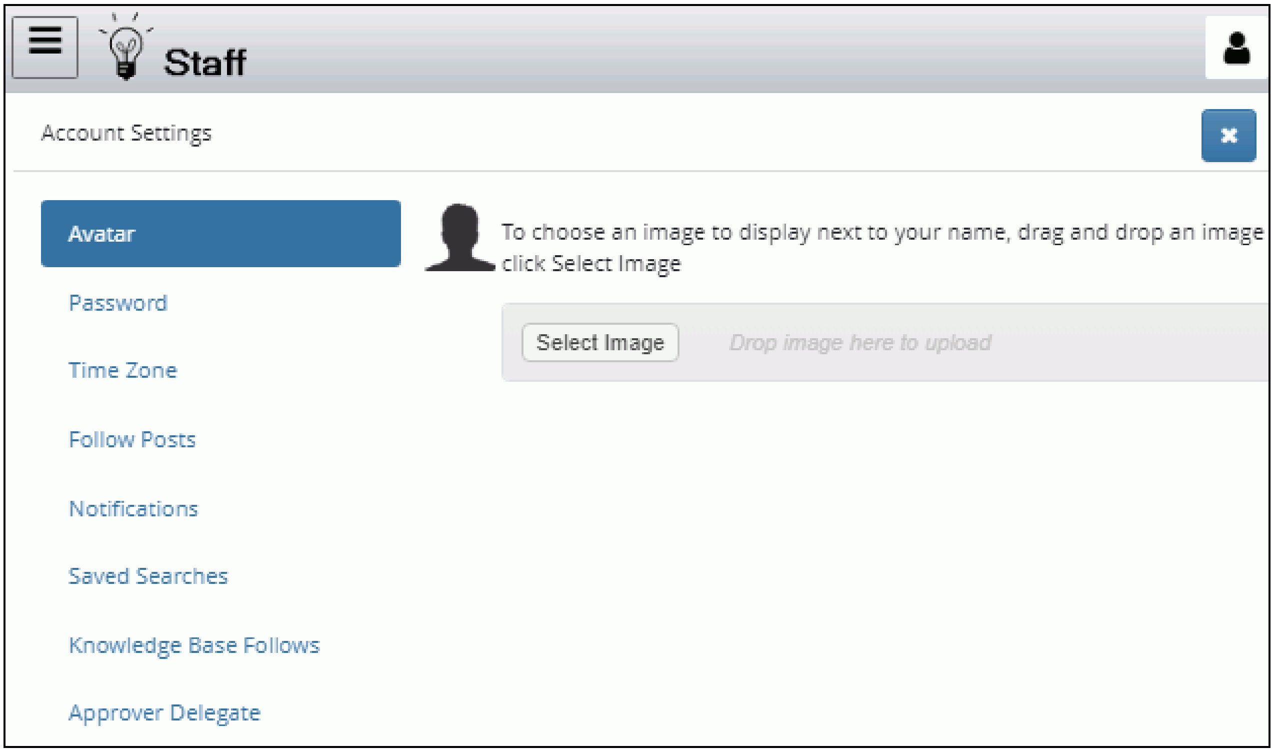
- The **Forgot Password** link in the Login dialog enables a customer to enter an email address to which an email will be sent with a login and a link for resetting their password. Note that a customer won't be able to change their password if the source of their Customer Profile record is Active Directory, LDAP, or a relational database that is being synchronized with a mapped password.

- The **Remember Me** option places a cookie on the customer's system.

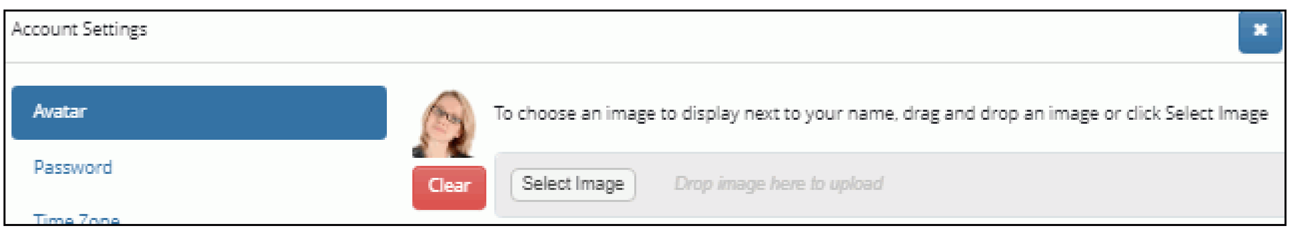
A customer's avatar can be initially populated via Customer Profiles or Active Directory synchronization. The customer can set his/her avatar via Account Settings on a mySupport portal. The avatar will appear in discussion posts and on the Approvals tab in the Incident, Change, and Purchase Request screens if the customer is an approver in an approval cycle or a customer on an incident or change.

Account Settings

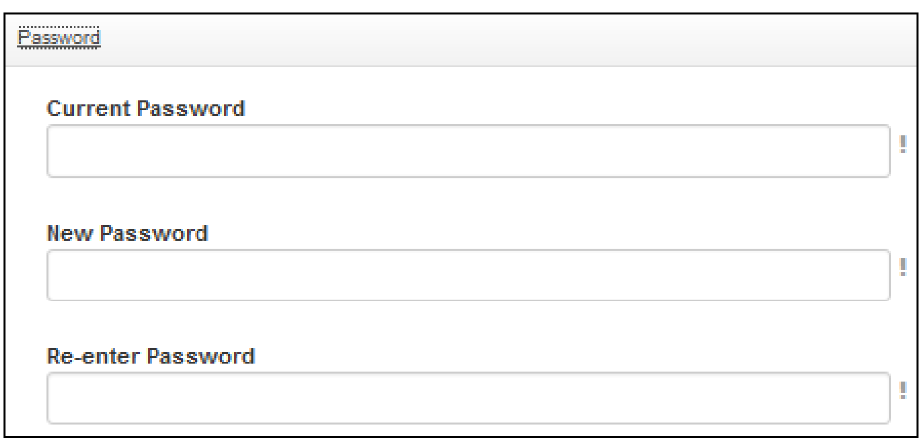
The Account Settings dialog is accessed via the Account Settings option on the menu that appears when you click the avatar picture/icon or a navigator link on the portal; customers can set their avatar, password, time zone, default follow option, and notifications, remove saved searches, link an account for authenticating automatically via Facebook or LinkedIn®, and stop following specified knowledge entries.



Avatar - This section appears if the Allow Avatar Edit option is enabled on the Customer tab in the mySupport Options configuration screen. It enables a customer to set his/her avatar that will appear in the upper right corner of the portal, in discussion posts, and on the Approvals tab in the Incident, Change, and Purchase Request screens (if the customer is an approver in an approval cycle or a customer on an incident or change). The avatar will be updated in the customer's Profile record.



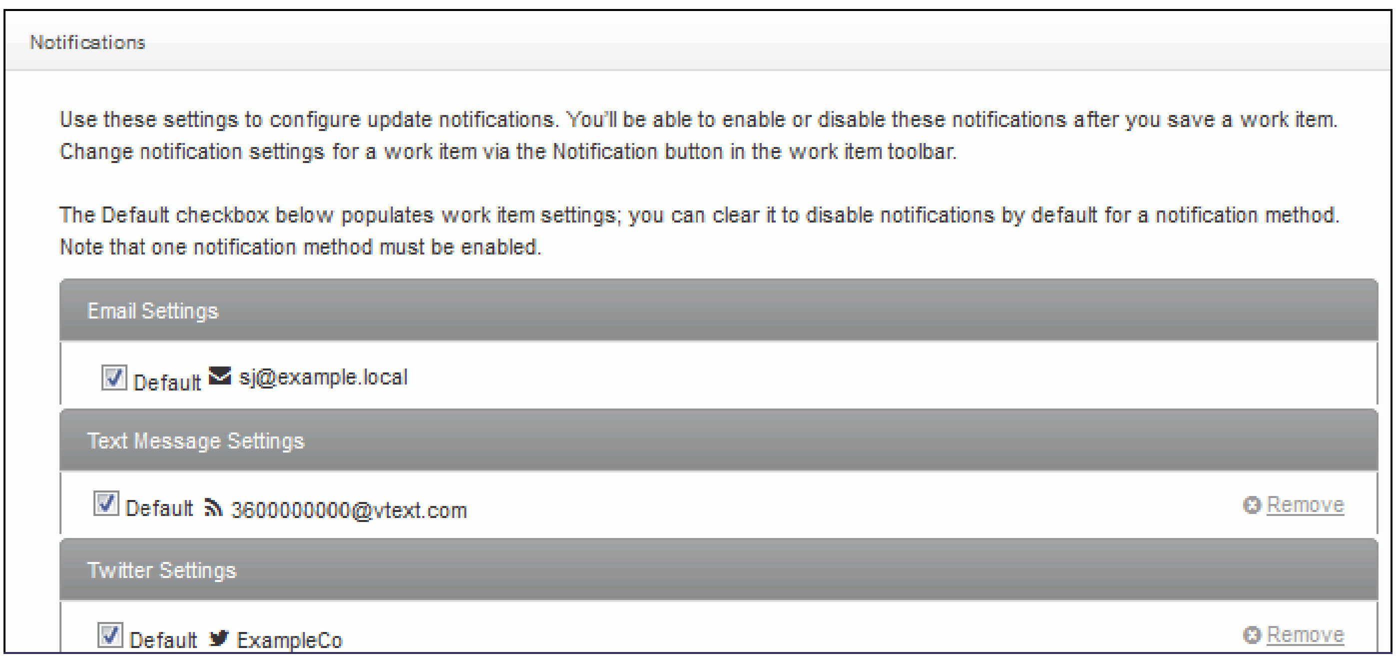
Password - This section enables a customer to reset his/her password for logging into the portal; it will be updated in the customer's Profile record.



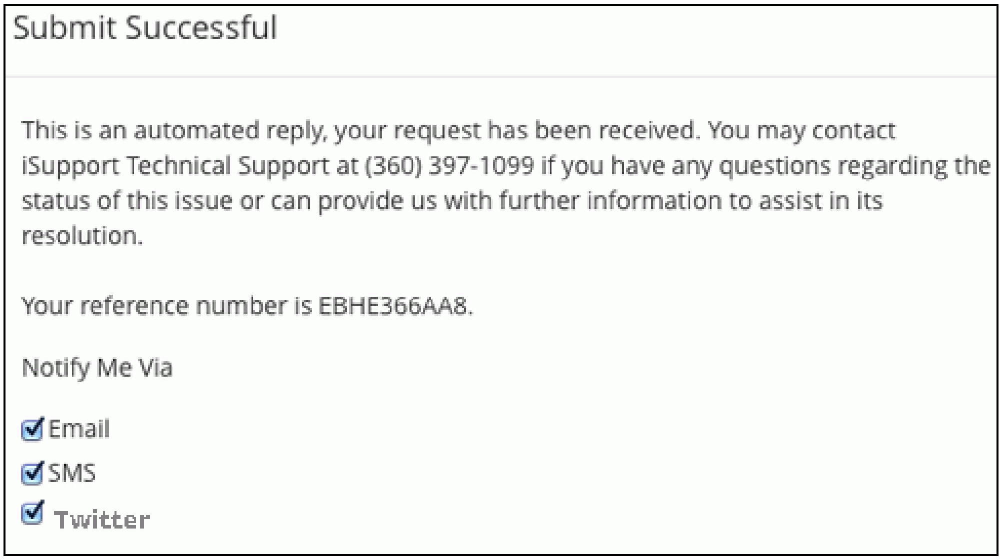
Time Zone - This section enables a customer to set the time zone for dates that display on the portal.

Follow Posts - The Follow option in the Create a Discussion Post dialog enables an email notification to be sent when someone replies to the post. A user's first discussion post or reply will determine the default for the Follow option in the Create Discussion Post dialog; a customer can set this default to Yes in this section.

Notifications - Customers can use the Notifications section to enable a notification to be sent via email, SMS, and/or Twitter direct message whenever a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests).



Customers can enable or disable notifications for a work item after saving, and change notification settings for an existing work item via the Notification button in the work item toolbar.

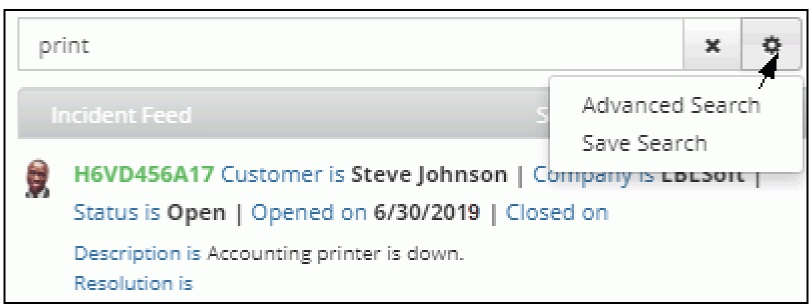


In the Notifications settings, customers configure the phone number and/or Twitter account to which the notification should be sent. If using Twitter, note that the user needs to be following the account associated with the configured Twitter application.

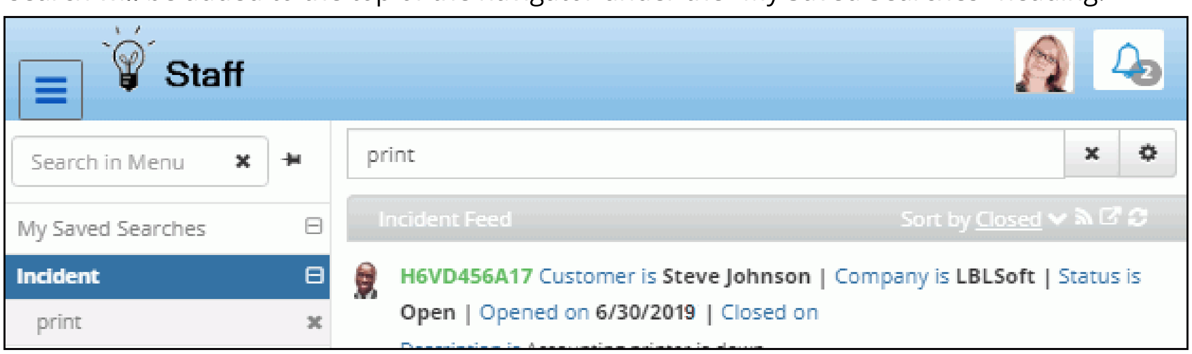
When a customer adds a phone number and selects a configured SMS carrier, the number will precede the carrier's @<*domain name*> email address to create the SMS gateway for the message to be sent. A text will be sent to the phone email address with an activation code.

The Default checkbox will populate the work item notification settings. Customers can prevent all email notifications by deselecting Default under Email Settings, or prevent email notifications for a work item by deselecting Email via the Notifications button in a work item. Note that one notification option must be enabled.

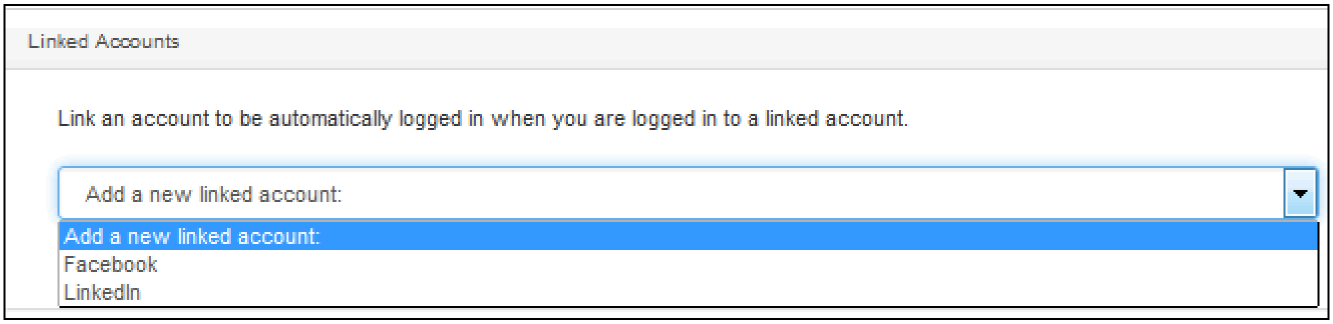
Saved Searches - This section enables customers to remove searches saved via the Save Search feature; for feeds accessed via navigator items, customers can enter a term in the search bar and then click the gear icon to save the text entered with a name and description.



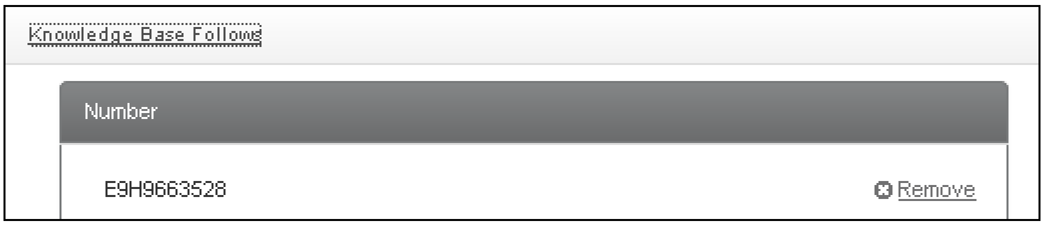
The saved search will be added to the top of the navigator under the "My Saved Searches" heading.



Linked Accounts - Customers can use this section to link an account for authenticating automatically via Facebook or LinkedIn®; for example, if the customer is logged into Facebook, the customer will not need to enter an iSupport login. Note that Facebook and LinkedIn applications must be configured in order for these options to appear.



Knowledge Follows - If the Follow button is enabled for following a knowledge entry, its author, and/or its category, customers can stop following entries in this section.

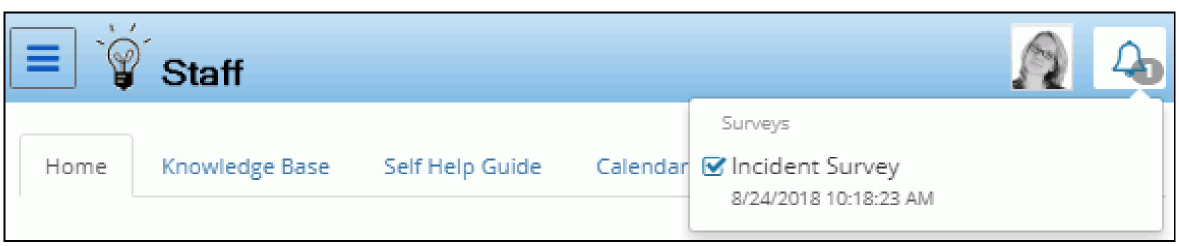


View Complete Profile button - If a mySupport customer profile layout is configured, this button appears for the customer to view their profile record.

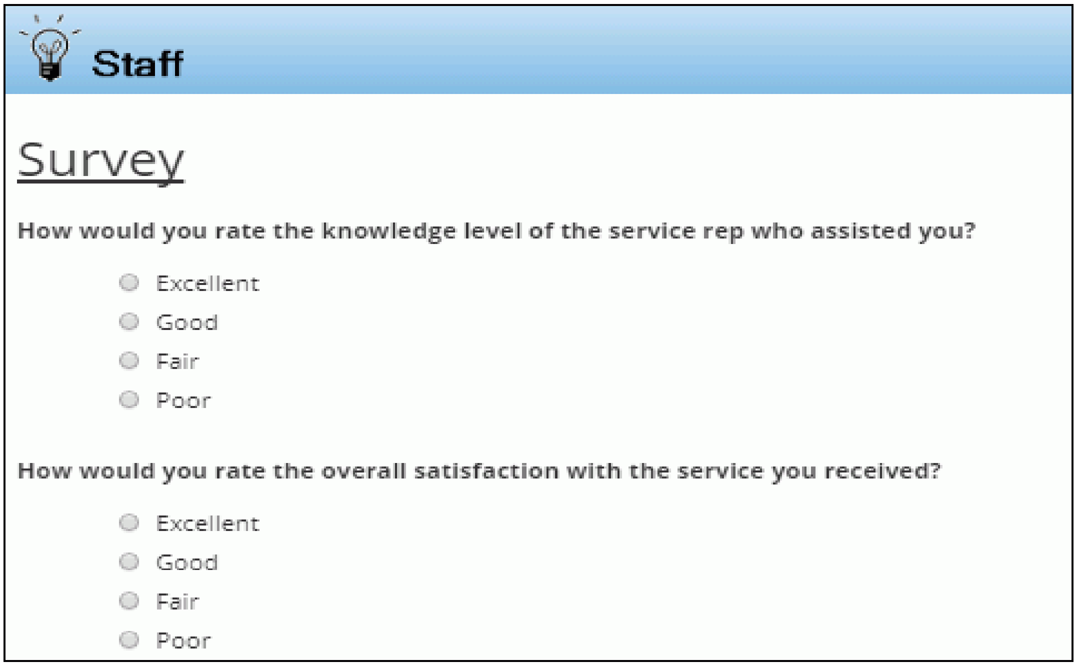
Approver Delegate -Select a customer who can specify a verdict on work items pending approval for the logged in customer. Note that an approver delegate can also be specified for a customer in their Customer Profile record.

Submitting Surveys

If a survey has been sent to the customer, a 1 notification will appear in the upper right corner of the portal.



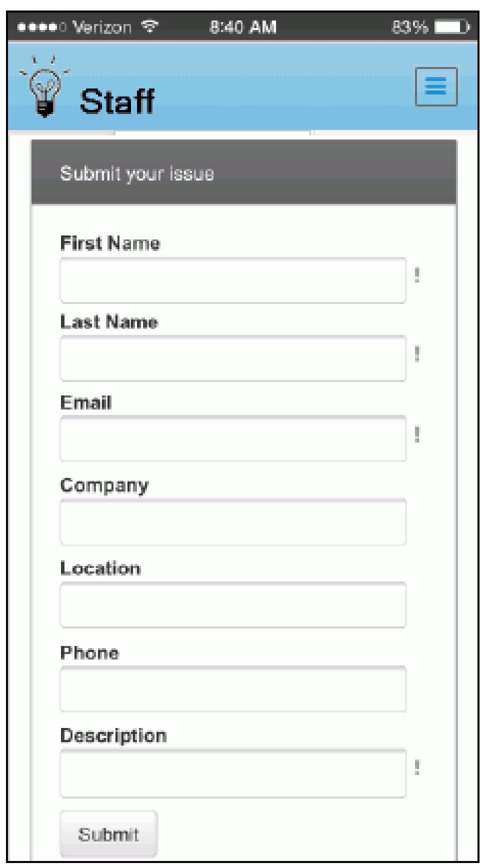
Customers will need to simply select the survey name to display it.



Work Item Submission

Easy Submit

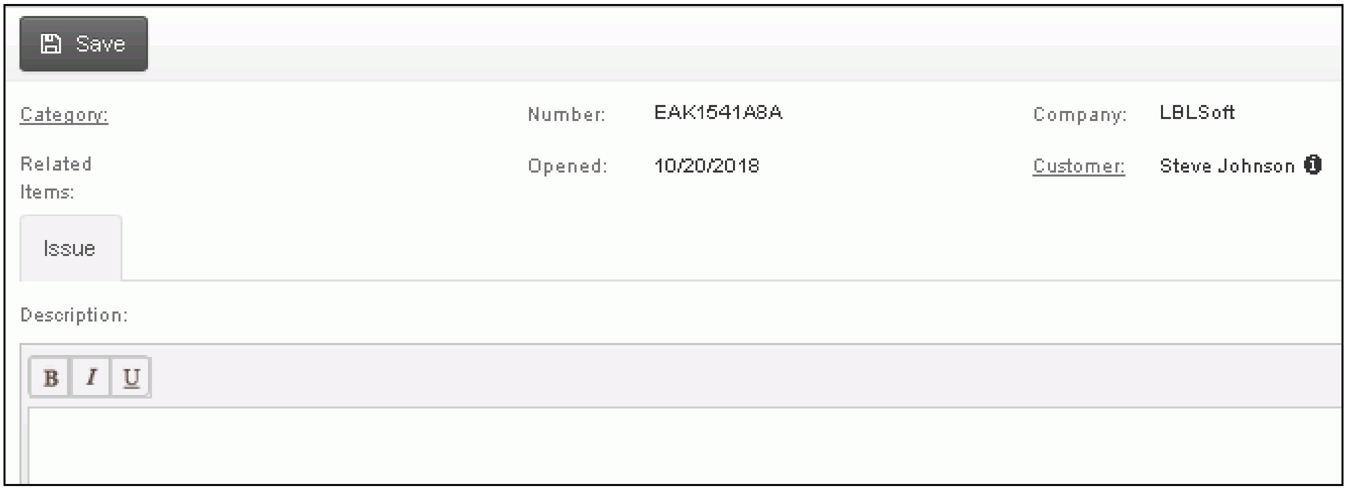
iSupport's Easy Submit functionality enables customers to use an older version of a device that cannot render HTML5 to submit incidents. The Easy Submit interface contains a Description field along with any fields required for authentication. This functionality utilizes the device's user agent string, which identifies the browser version and other device details. You can also include an Easy Submit link on a mySupport portal navigator to display the Easy Submit interface.



You can enable the customer to enter a company, location, and/or phone number via the Easy Submit interface, and use an incident template to apply to incidents created via the Easy Submit interface on a mobile device.

Incident/Change/Purchase Submit

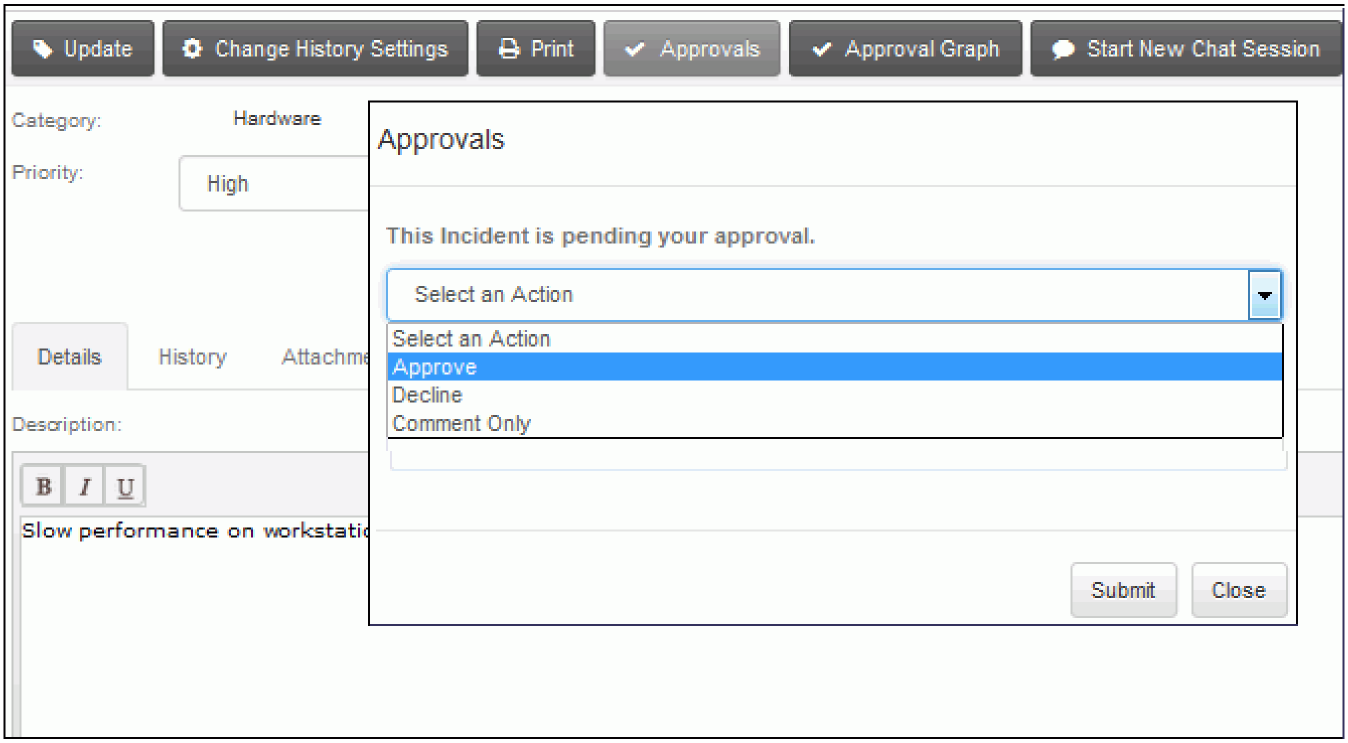
You can create links for customers to submit an incident, change, or purchase request. The fields and tabs included on the Submit screen are configurable, as well as the default mySupport-submitted record assignee and the text to display after submission. Authentication (logging in) is required in order to submit and view incidents, changes, and purchase requests.



You can enable the category picker for a template and require that the user selects the lowest level category.

Custom fields can be individually enabled or disabled for display on a mySupport portal. Note that If a call script is enabled for a category set, it will not display on a mySupport portal. Rule groups for customers, companies, or category sets are applied to mySupport-submitted incidents; the default rule group will only be applied if none of the provided category levels, the customer, or the company are associated with a rule group. However, if a rule group is associated with a template, the template rule group will override any rule groups assigned to the category, customer, or company. Any rule group associated with the lowest level of category will be applied; if none is associated, the next (higher) category level is searched, and so on.

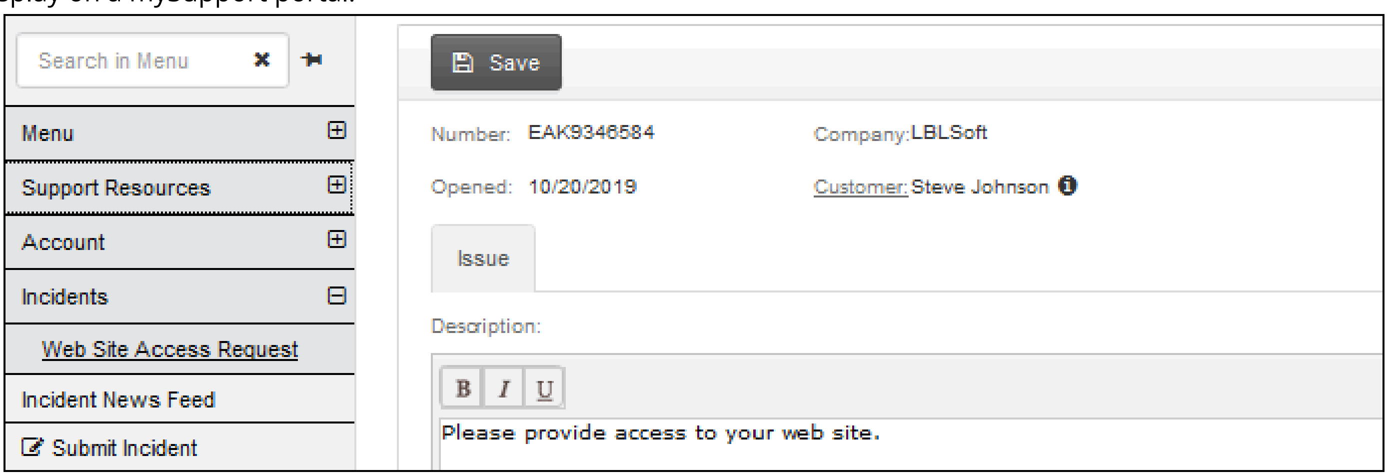
If configured, an **Update** button will appear after an incident or change has been submitted. A customer can use it to enter text that will be included in the work history. Customers can select the history types to display via the **Change History Settings** button on the toolbar. The **Approvals** button will appear if the approval button is configured in the mySupport Options screen and a customer's work item is pending approval or a customer is the current approver due to specify a verdict. Verdict options are Approve, Decline, or Comment Only. A customer can cancel approvals if the customer is assigned to the work item. The Approval Graph button displays approvers in the cycle.



If you have an unlimited support representative license, a customer can be designated as a mySupport Editor via the Customer Profile screen. This enables the customer to choose another customer for a new incident and edit the incidents and FAQs that the customer has access to view.

Incident/Change/Purchase Template and Incident/Change Hierarchy Template

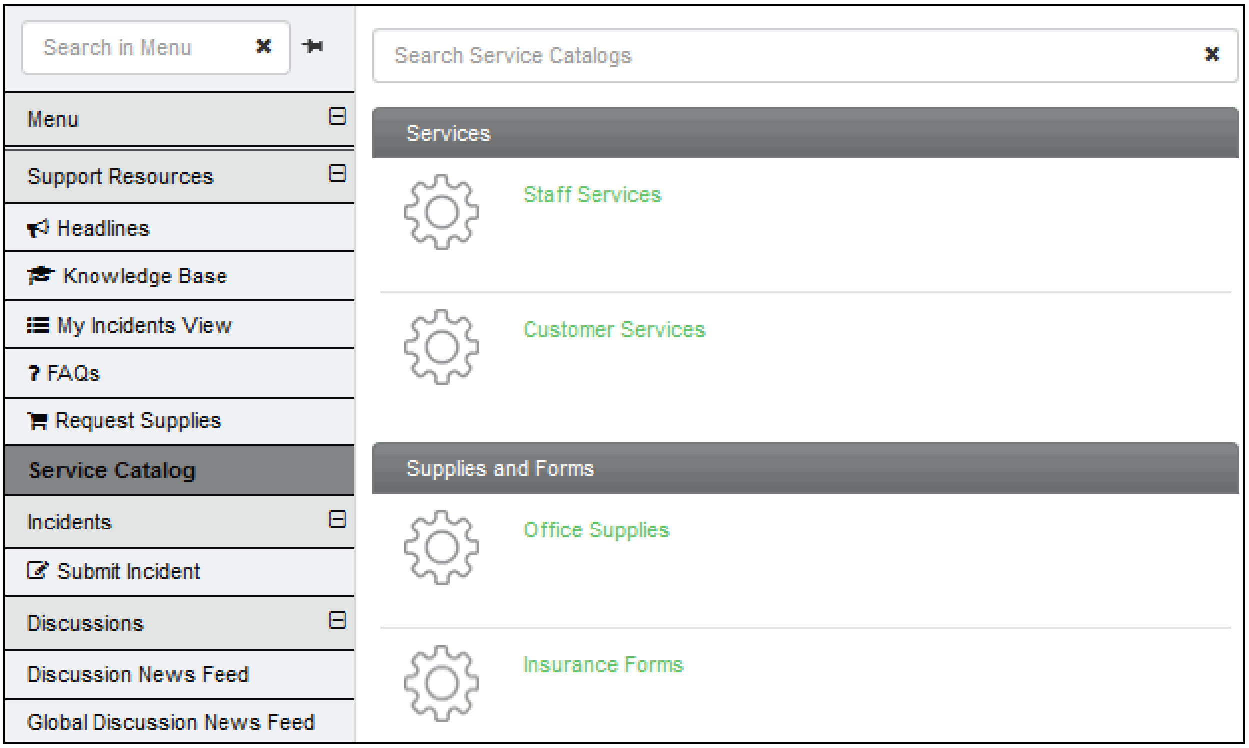
You can create links for customers to submit an incident, change, or purchase request using a template that will populate fields. Note that if an auto-close incident template is included on a mySupport portal, the incident status will *not* change to Closed; the incident will remain open. Custom fields can be individually enabled or disabled for display on a mySupport portal.



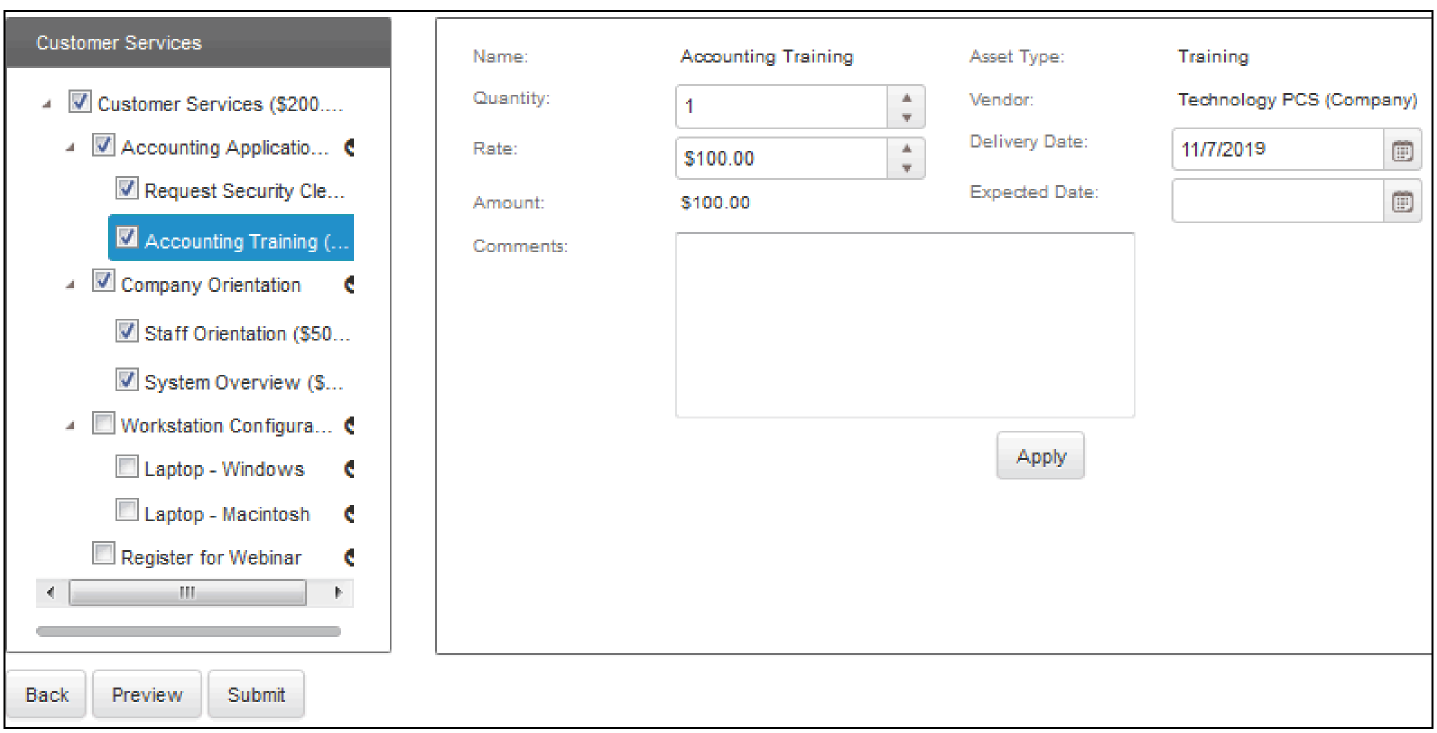
You can include links for customers to submit an incident or change using a hierarchy template that will populate fields and create a hierarchy of records. Note that only a top-level template will appear when the link is clicked.

Service Catalog

Service Catalog functionality is available if you have the Service Desk edition. It enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. An entire service catalog or only one section can be included on a mySupport portal; access to a service catalog section or individual service request entries may be restricted to specific customer and support representative groups. An entire service catalog with two sections is shown in the example below.

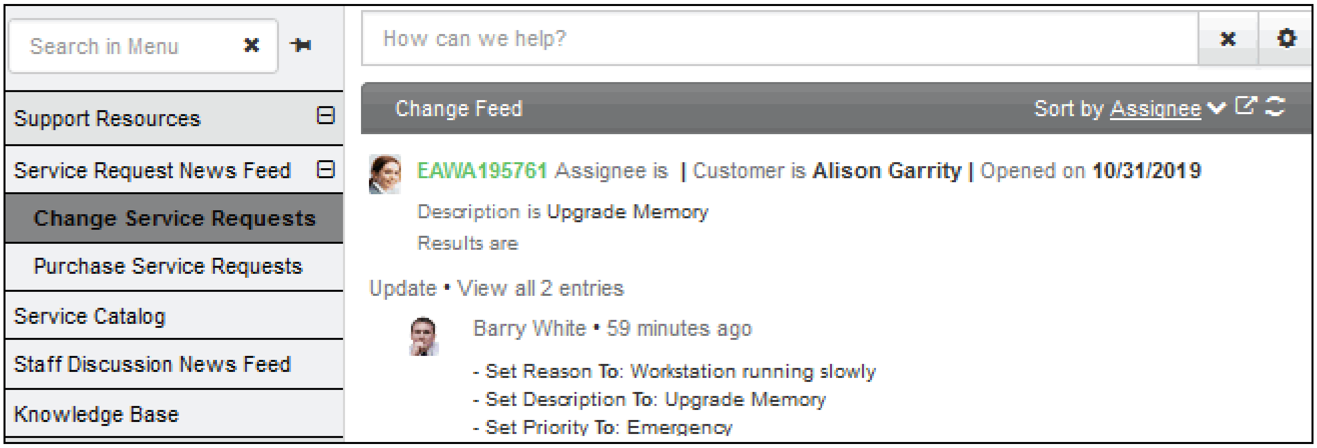


Customers can click on a section to display service catalog section entries and submit a change or purchase request. Service catalog entries are entered in the Configuration module; each section contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, links to web pages, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.



A link to a specific service can be configured; note that display of the dollar amount next to an entry is controlled by the Can View Service Cost field in the customer's Profile record. The Total Cost amount includes the cost of all selections (including line items from the purchase template).

The Service Request News Feed displays the changes created by catalog submissions in one feed and the purchase requests created by catalog submissions in another feed.

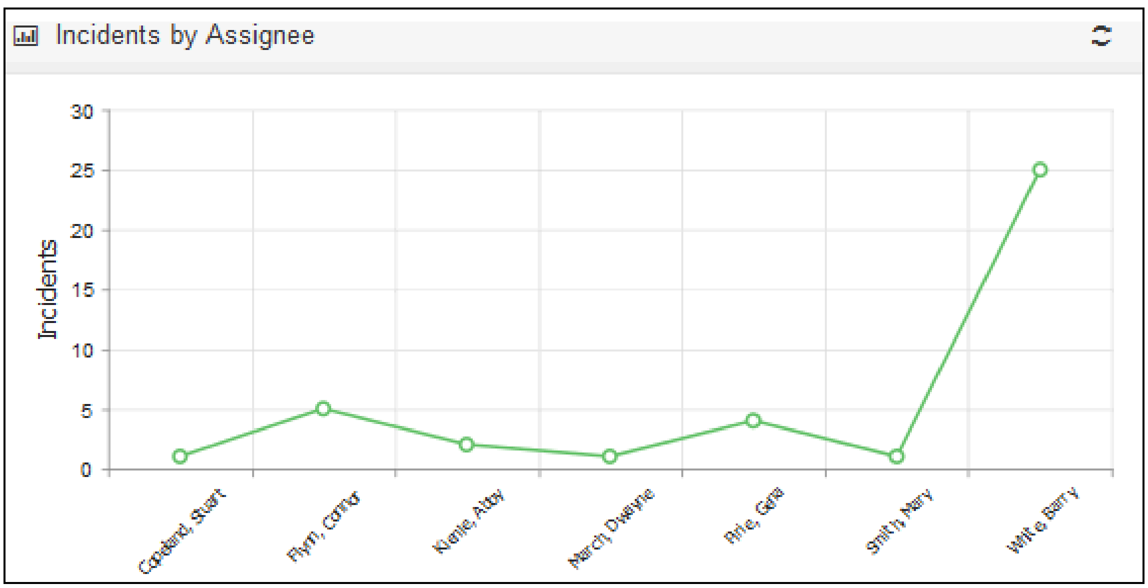


Work Item Viewing and Searching

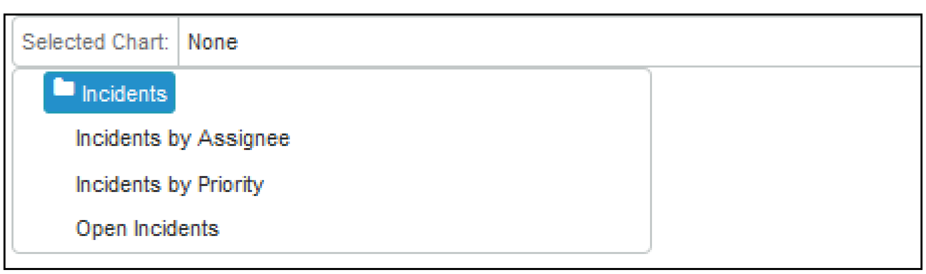
Existing iSupport data can display on a mySupport via navigator links, components, or configured mySupport views accessed via navigator links and components.

<u>Chart/All Charts</u>

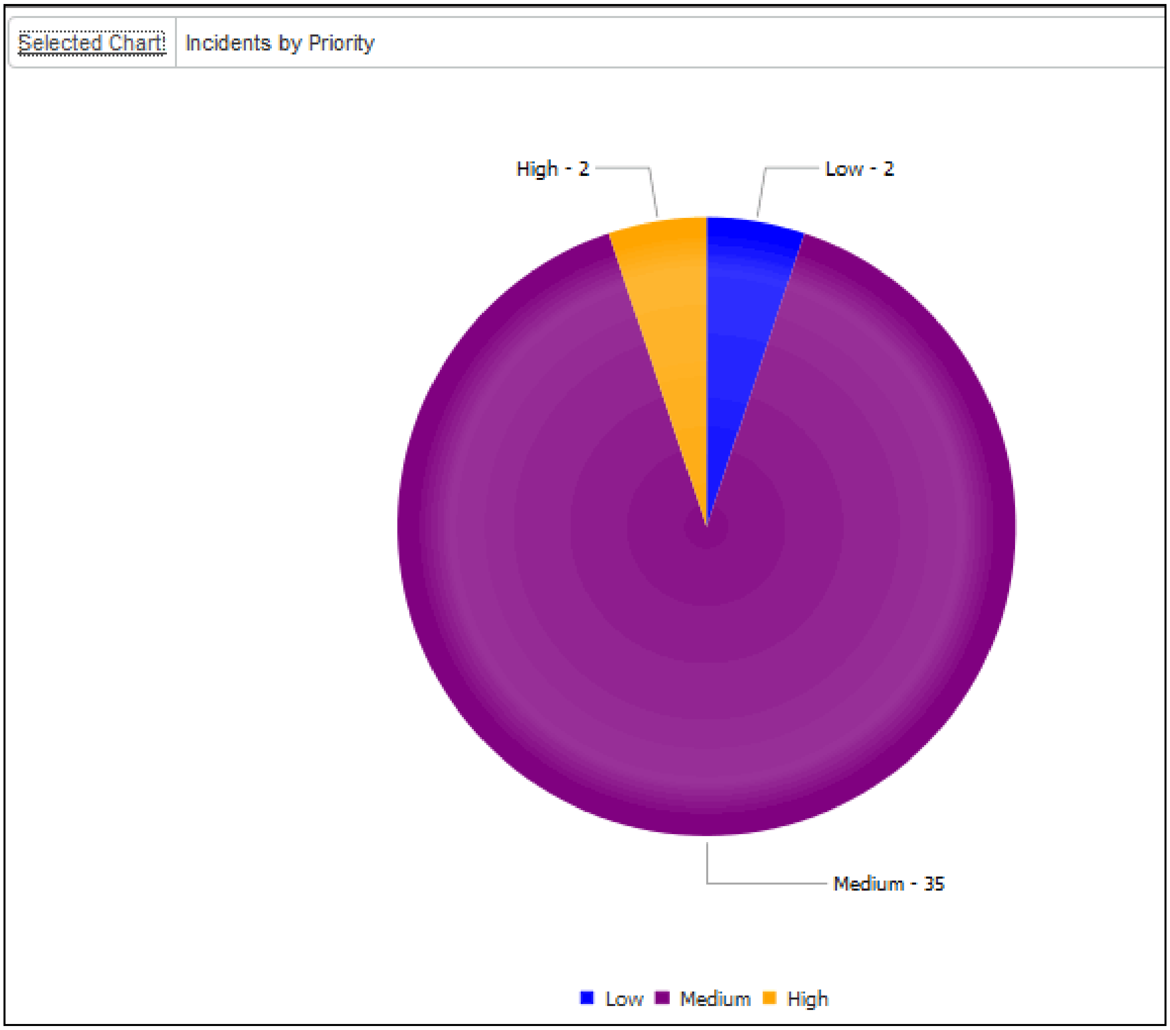
The Chart and All Chart features display a single mySupport chart or a list of mySupport charts configured via the Chart Designer. A single chart can be configured to display via a navigator link or a component.



You can include a navigator link for displaying a list of all mySupport charts configured via the Chart Designer.

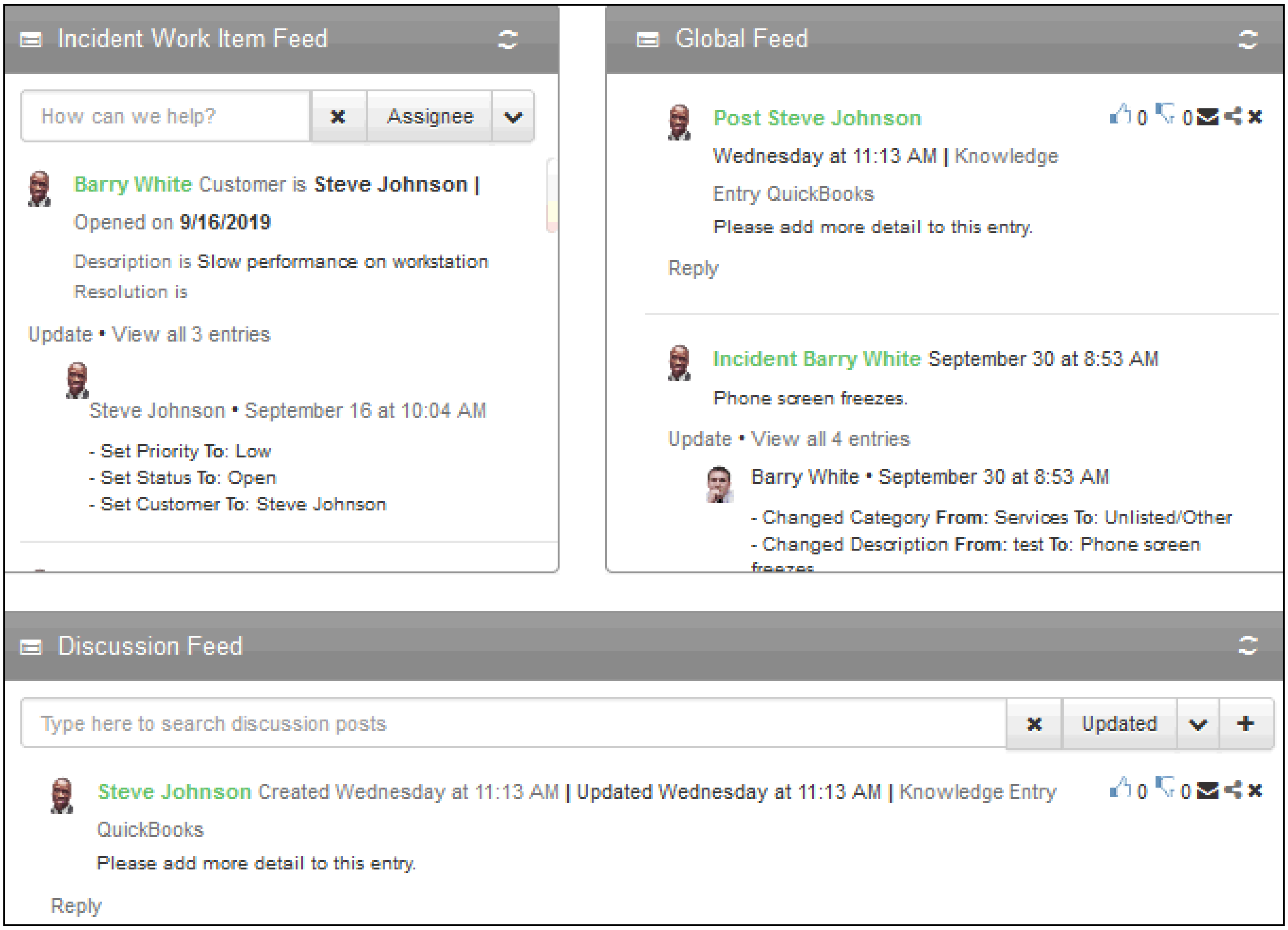


The selected chart will fill the content frame.



Feeds

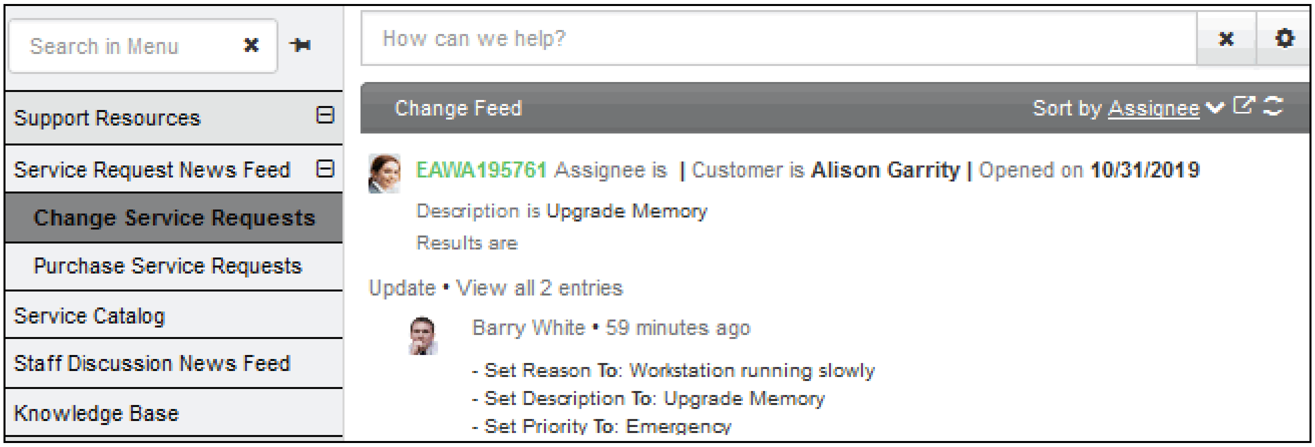
iSupport includes feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. Items appear according to the date and time modified. If enabled to appear, work items will appear with the work item type, elapsed time since the item was modified, description, and a history entry. The **Update** link can be included for entering text that will be included in the work history. The type of history entry, fields to appear after the work item type, and sort order are configurable. For feature information on discussion feeds, see “Discussion Feeds” on page 40.



For work item feeds:

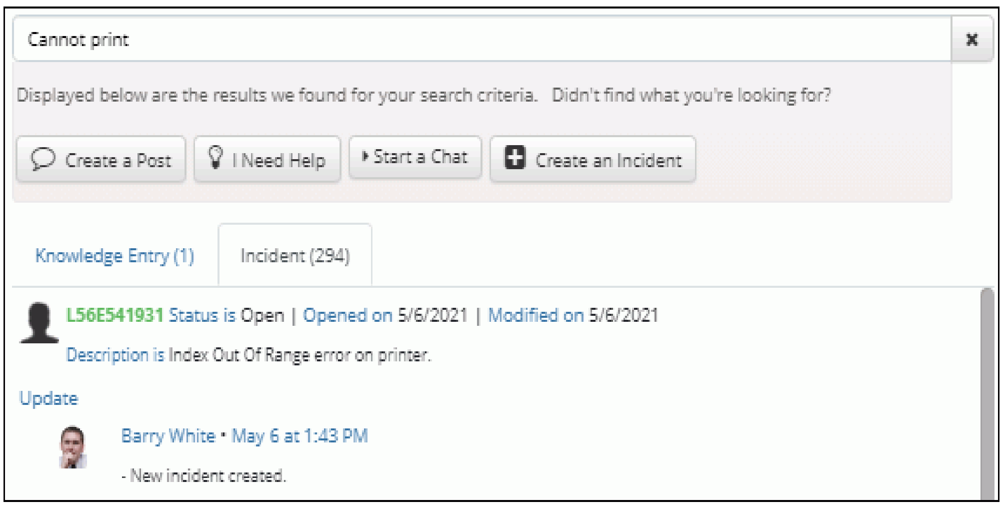
- For changes, purchase requests, and service contracts, depending on what is specified in a customer’s profile record, the news feed displays items for a customer or the customer’s company, department, location, or group.
- Customers can open a work item in a feed by clicking on it; the fields that appear in the work item display screen are configurable via mySupport layouts and settings.
  - For changes, an Update button can be included in the work item display screen for entering text that will be included in the work history.
  - For Problem records, a Create Incident button can be included for a customer to submit an incident that will be related to the problem. The text in the Short Description field will be included by default in the Description field in the Incident record.

- The Service Request News Feed displays the changes created by catalog submissions in one feed and the purchase requests created by catalog submissions in another feed.

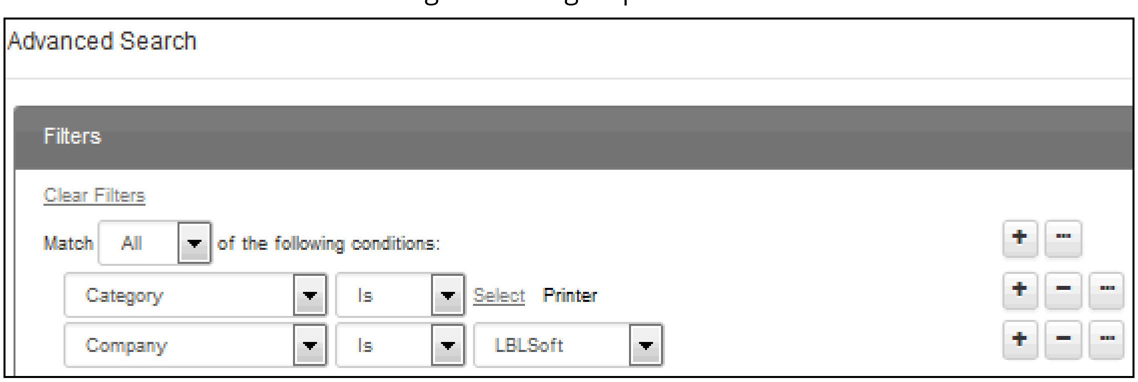


Search/Global Search

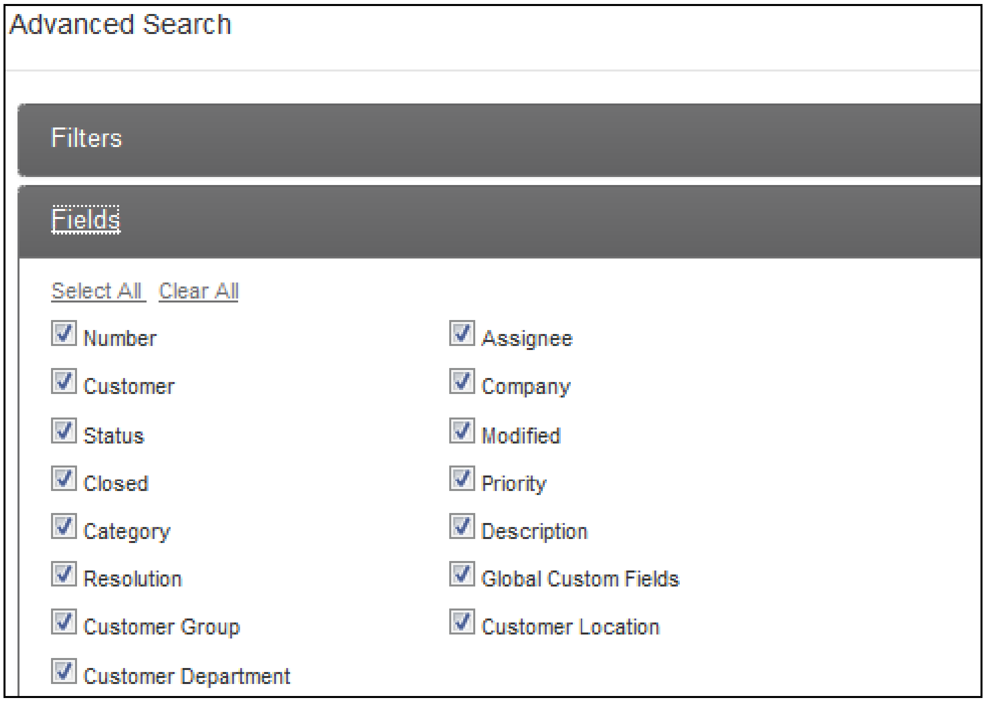
A search bar will appear above work item feeds; if configured, links will appear for creating an incident, displaying a self help guide (the link will appear by default as "I Need Help"), starting a chat, and/or creating a discussion post. The customer can select Configure to use Advanced Search and Save Search options.



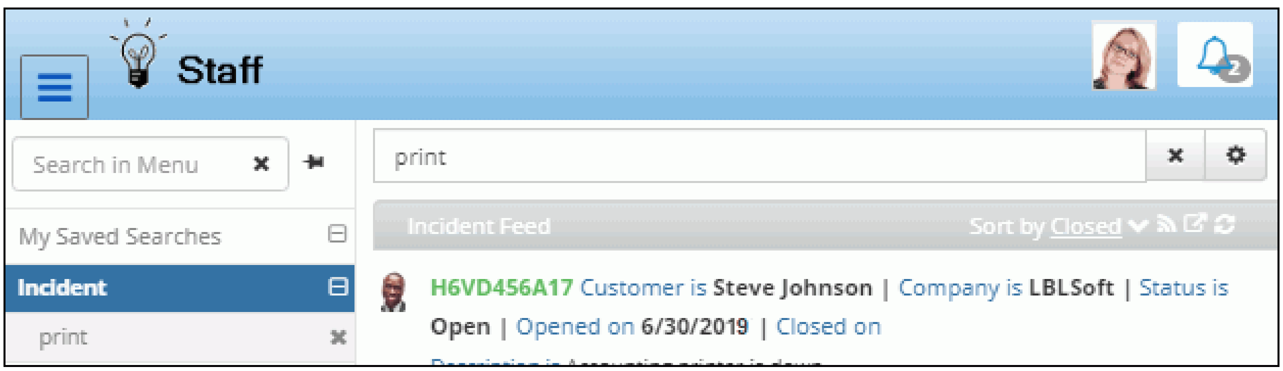
The **Advanced Search** option enables a customer to filter the search by selecting the fields to be searched and by entering conditions using Boolean operators. The Filters section enables customers to refine a search by selecting a field, comparison method (Or or Not), and value applicable to the selected field. The Add Condition and Remove Condition options can be used for each condition line, and the Add Condition Group option can be used to enable a set of conditions to be executed together in a group.



The Fields section will include all of the fields configured for work item display; customers will select the fields to be searched.



The **Save Search** option enables a customer to save the text. After entering a name and description, a My Saved Searches option will appear in the navigator.

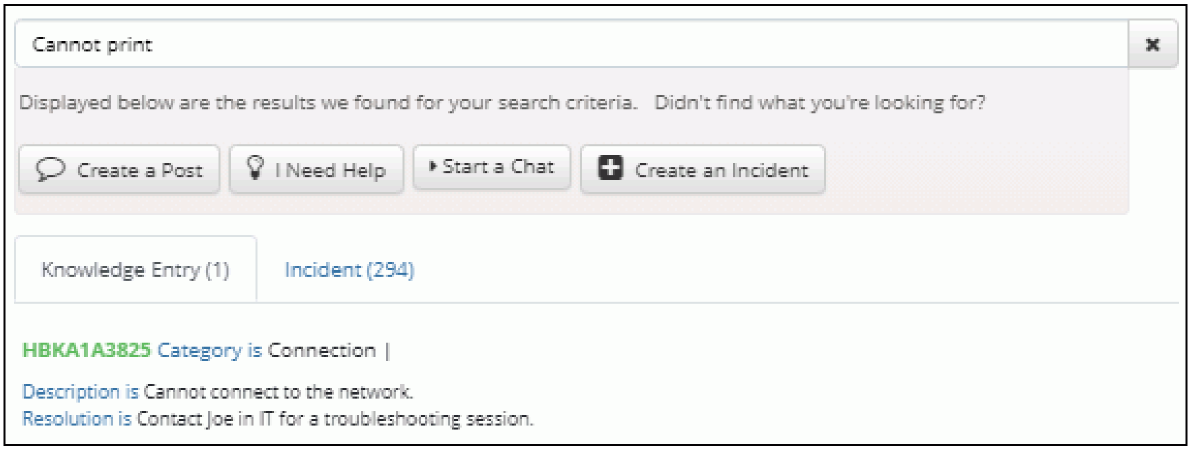


An **RSS Feed** option will appear after a search is saved; a customer can click on it to display the RSS Feed dialog. RSS feeds send notifications when the contents of a custom feed change; for example, an RSS feed can be used to send updates to subscribers that don't have access to the mySupport site. The customer will copy the URL listed and then click the Subscribe option. The notification sent is configurable.

Global Search

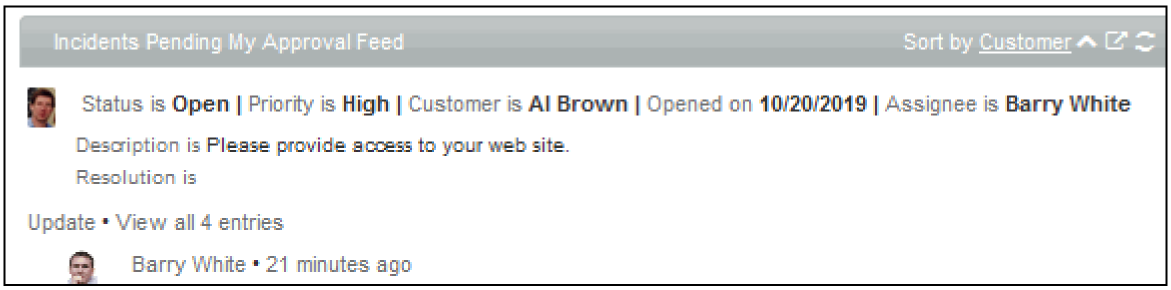
Global Search can be included in a component or above the global news feed. It enables a user to enter a problem description, search text, question, or post, and search work items, knowledge entries, and discussion posts for that text. A keyword search will be performed; all searches will be based on all fields configured for work item display. A list of words excluded in the search can be configured; this list will be utilized after two words are entered. If a phrase is entered in quotes, the text within the quotes will be used in the search. Results will appear below the search bar; if configured, links will appear for creating an incident, displaying a self help guide (the link will appear by default as "I

Need Help"),starting a chat, and/or creating a discussion post. See “Configuring Global Search Options” on page 63 for configuration information.



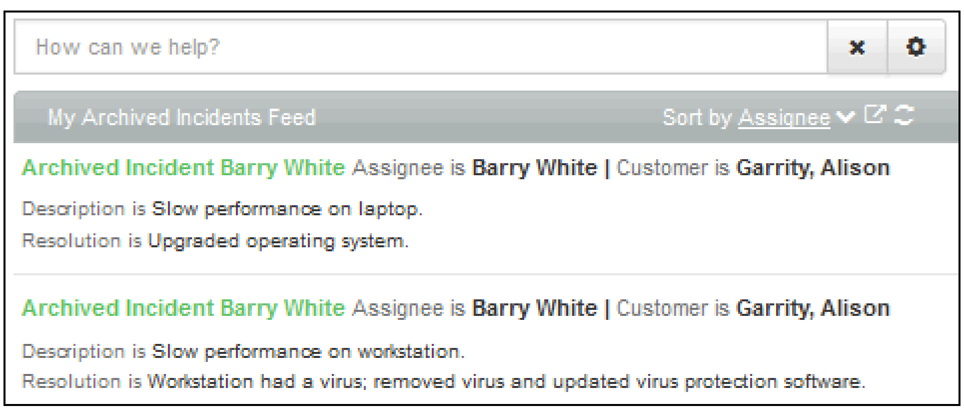
Incidents/Changes/Purchase Requests Pending My Approval

This feature displays in a feed the incidents, changes, and purchase requests that are pending approval by the logged-in customer. The customer can click on a work item to open and approve it. See “Feeds” on page 17 for configuration information.



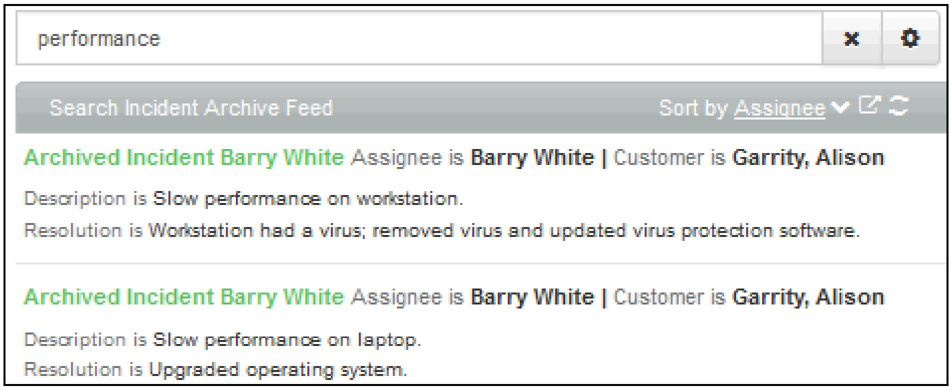
My Archived Incidents

This feature displays in a feed the archived incidents for the logged-in customer. See “Feeds” on page 17 for configuration information.



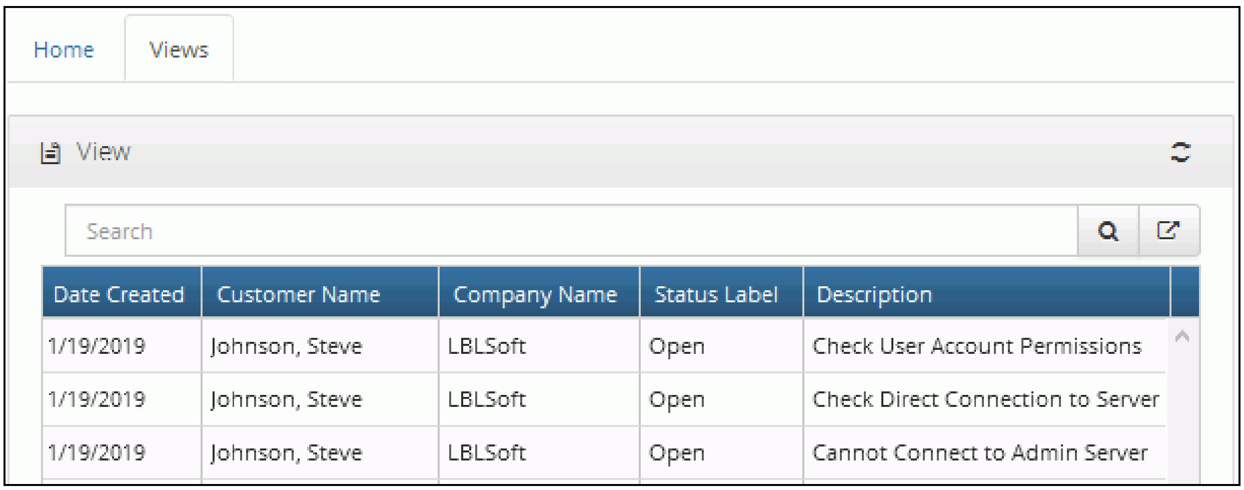
Search Incident Archive

This option enables a customer to search and display archived incidents. Note that a blank feed with a search bar initially displays when a customer first accesses this feature. See “Feeds” on page 17 for configuration information.



View/All Views/View Lists

You can display a single mySupport-enabled view or report view via a navigator link.



- You can display a single view or report view via the View component. This component will be labeled as the Report component in the Designer list for customers that can add it to dashboards.
- You can display a list of all mySupport-enabled views via the All Views navigator link.

These features use the display layout settings in Options for the fields that appear when a customer opens a record; see “Display Settings” on page 70 for more information. Note that if a customer is able to add dashboards and components, the component is called "Report" in the Designer list.

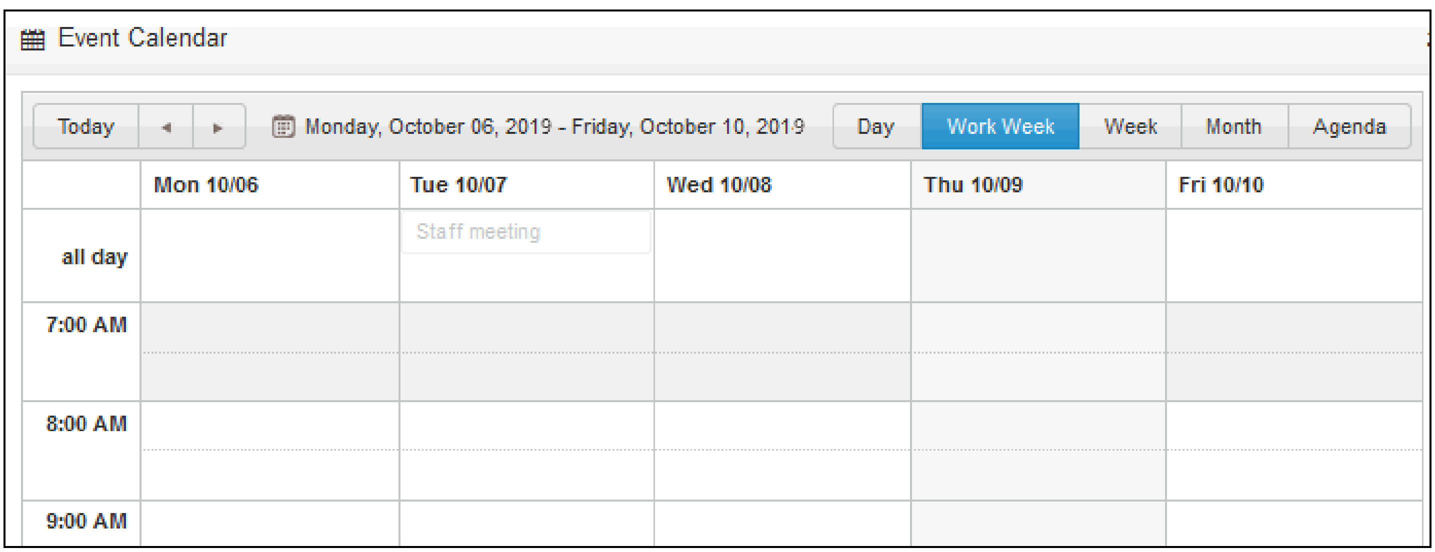
Informational Elements

Embedded Content

Use the Embedded Content component to display HTML content such as a web site or YouTube video. See "Embedded Content" on page 97 for configuration information.

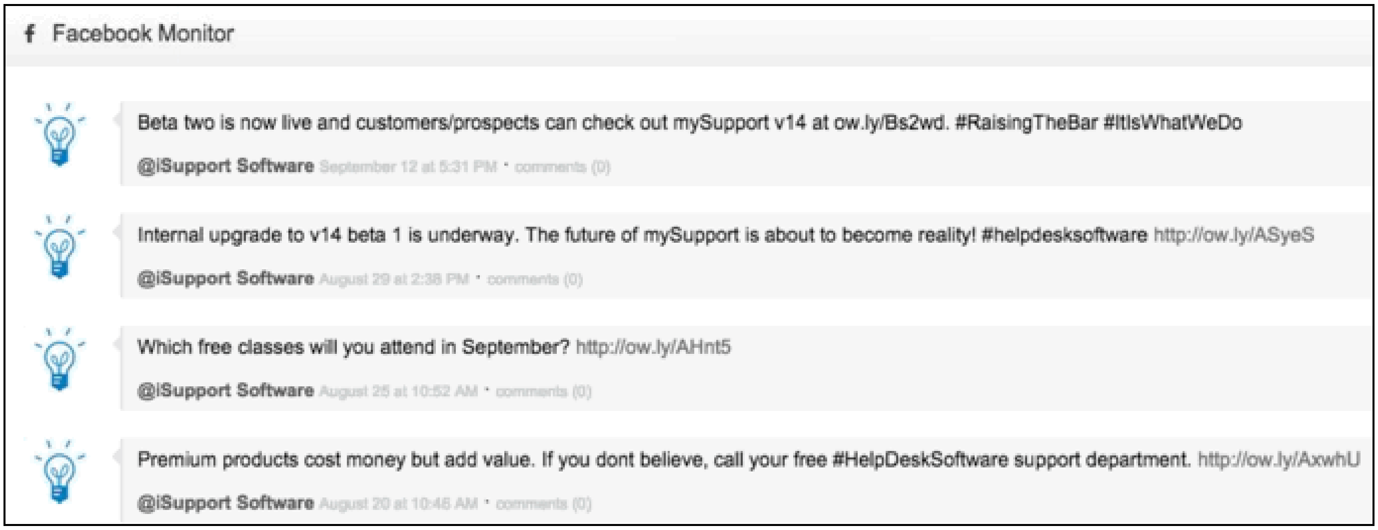
Event Calendar

Use event calendars to display meetings and other events, as well as scheduled changes (Service Desk Edition) on the Desktop and mySupport portals. You can enable RSVPs and specify a maximum number of attendees, and support representatives can use event calendars on the Desktop. Note that customers should set their time zone via Account Settings; the time zone of the server will be used by default on the Event Calendar. See "Event Calendar" on page 97 for configuration information.



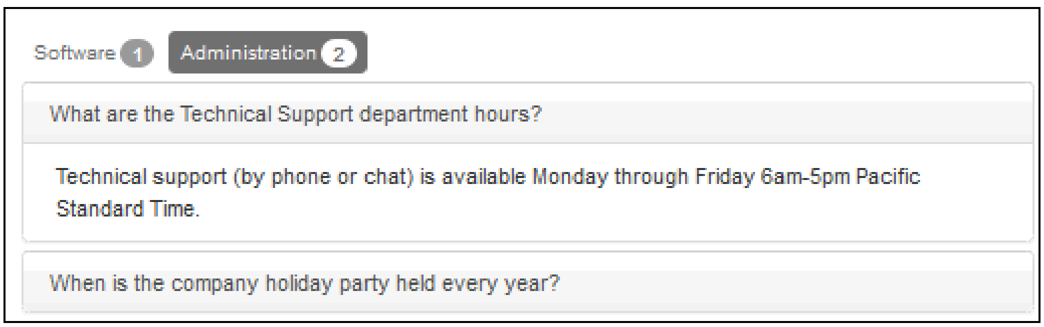
Facebook Monitor

The Facebook Monitor component monitors a Facebook page and displays posts and comments from it. See “Facebook Monitor” on page 101 for configuration information.



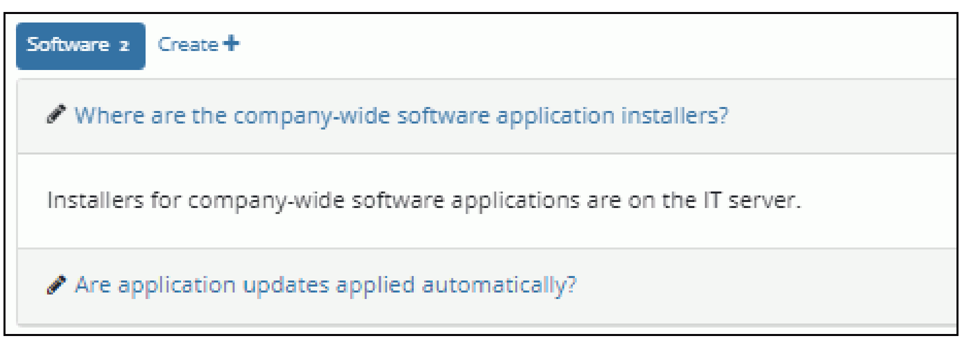
FAQs

FAQs that are enabled for display to customers (via the FAQ entry screen) can be included on a portal via a navigator link or in a component. See “FAQs” on page 102 for configuration information.



FAQ Topics

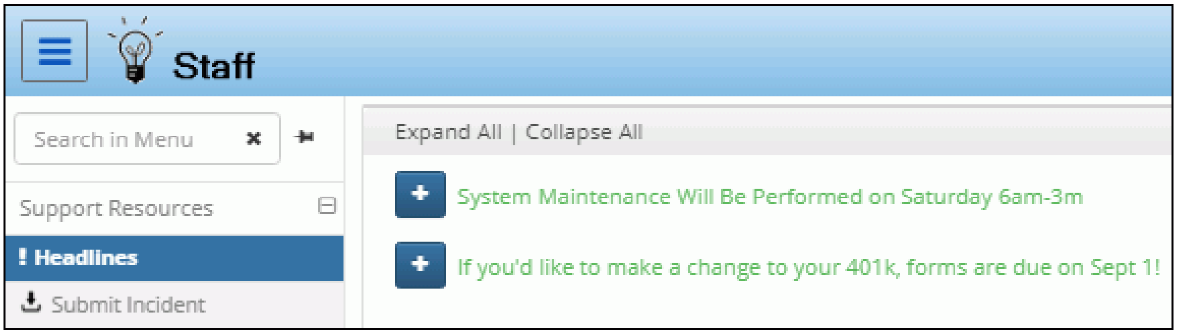
The FAQ Topic feature displays all FAQs for a specific FAQ topic. See “FAQ Topics” on page 102 for configuration information.



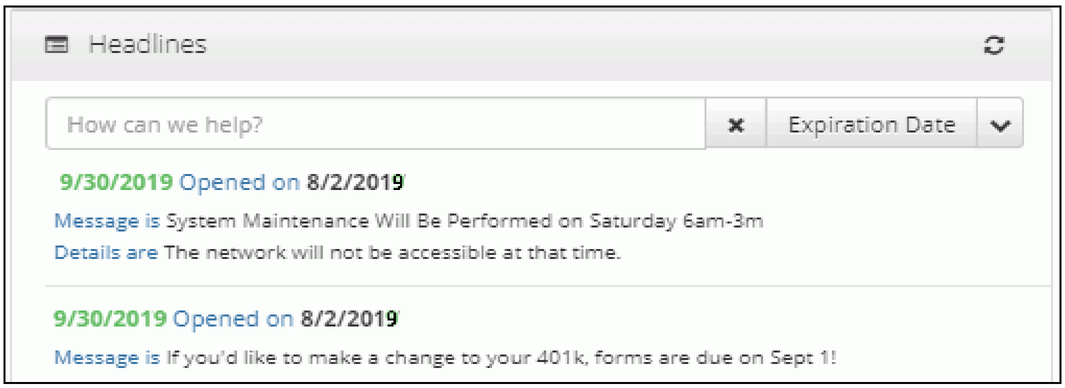
Headlines

Include headlines that are enabled (via the Headline entry screen) for display to customers using:

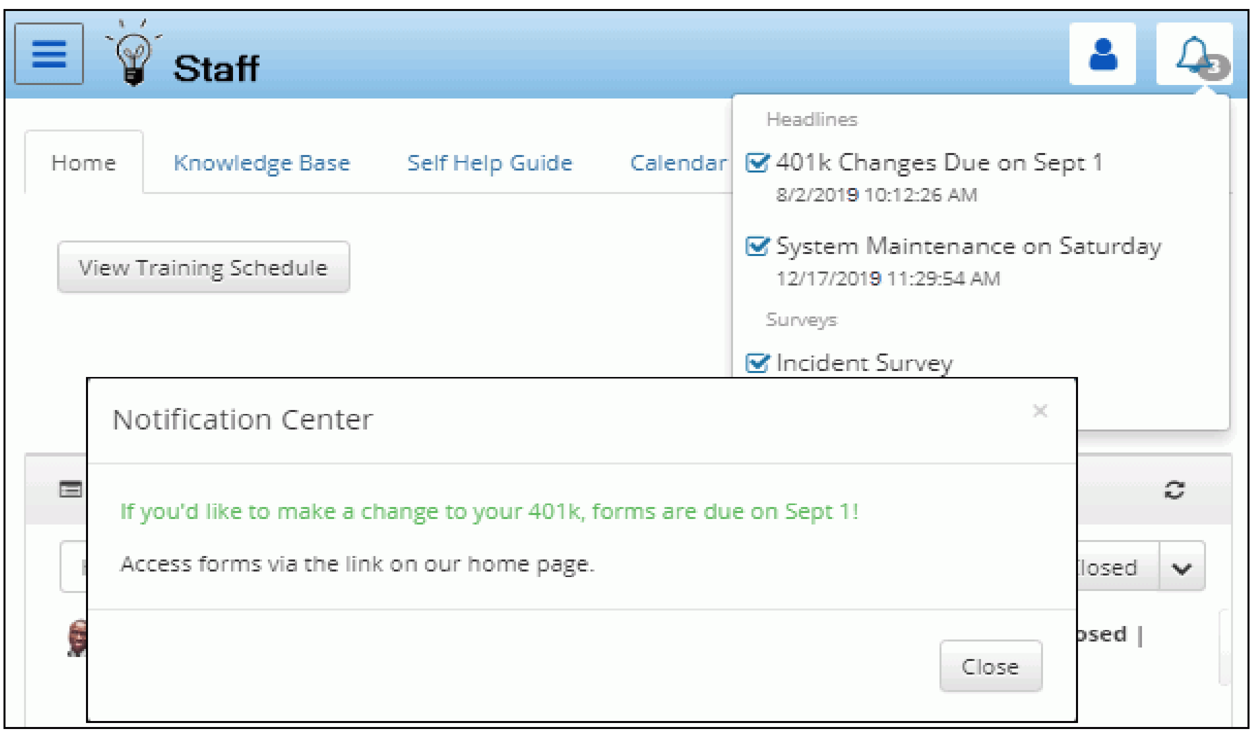
- A navigator link, which includes headlines in a list that can be expanded and collapsed.



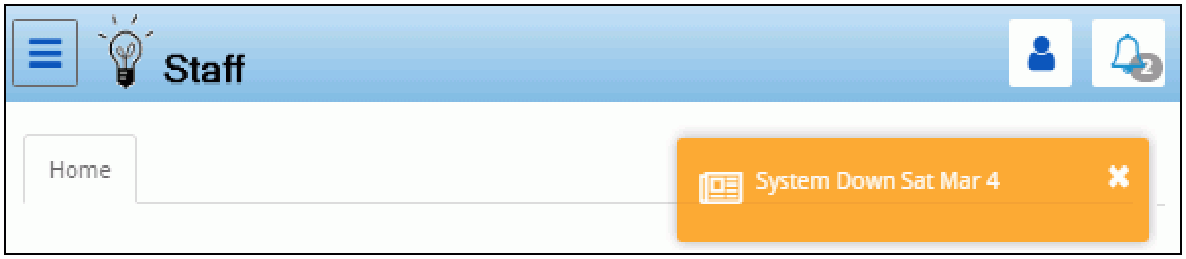
- A component, which can include a search and sort bar as well as well as a customizable feed layout.



- The Notification Center list. Click on a headline to display its message and details. The headline will appear each time the customer logs in until the headline expires or is deleted.



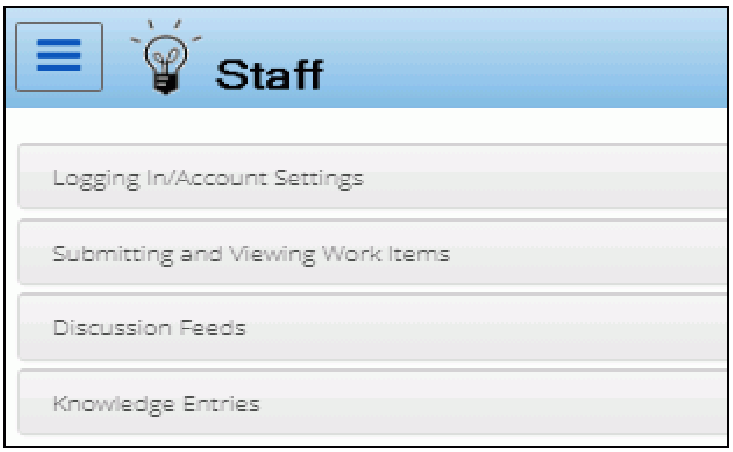
Headlines can also display in a popup.



Note that support representatives can publish headlines to Twitter if Twitter integration is enabled via the Options and Tools | Integrate | Social Media Integration screen.

Help

The Help option includes default text for the mySupport portal with general information on mySupport options; you can customize this information without purchase of a source code license via the Resource Editor. The Resource Editor (in the Utilities subdirectory) enables you to customize the text that appears for elements on a mySupport portal such as labels, messages, and the Help page. This text is stored in application resource (.resx) files that are named according to application functionality. It works with the cultural settings on the customer's browser and system; if a module is translated and a customer has the matching cultural setting, the translated settings will appear. See "Using the Resource Editor to Customize a mySupport Portal" on page 123 for more information.



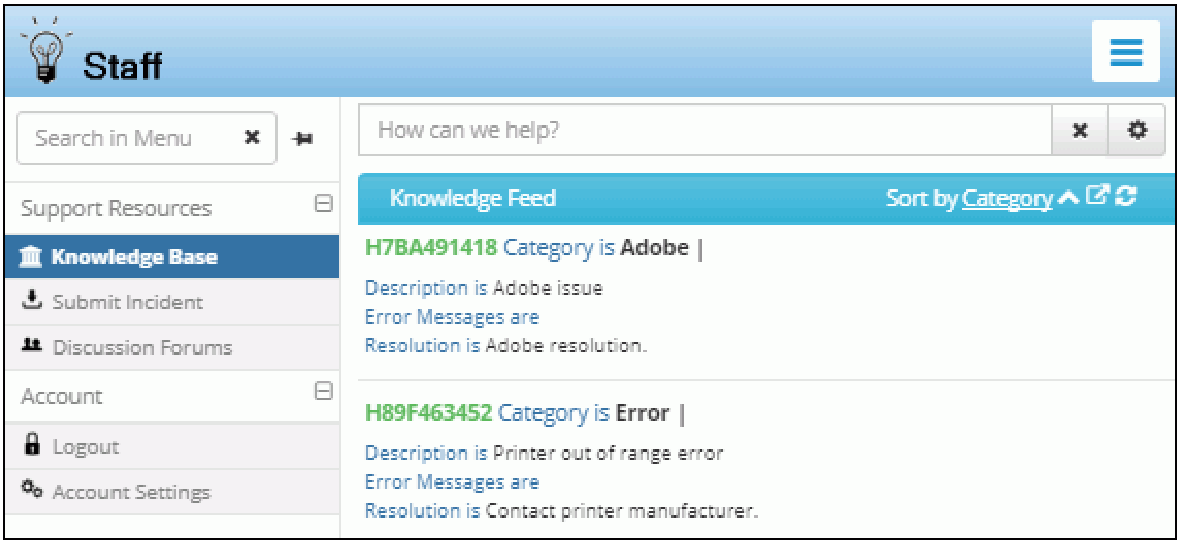
Home

The Home option hides the navigator and displays the dashboard set as default in the Edit mySupport Dashboard dialog displayed via the Edit option. The logo you set in the upper left corner also displays the dashboard set as default.

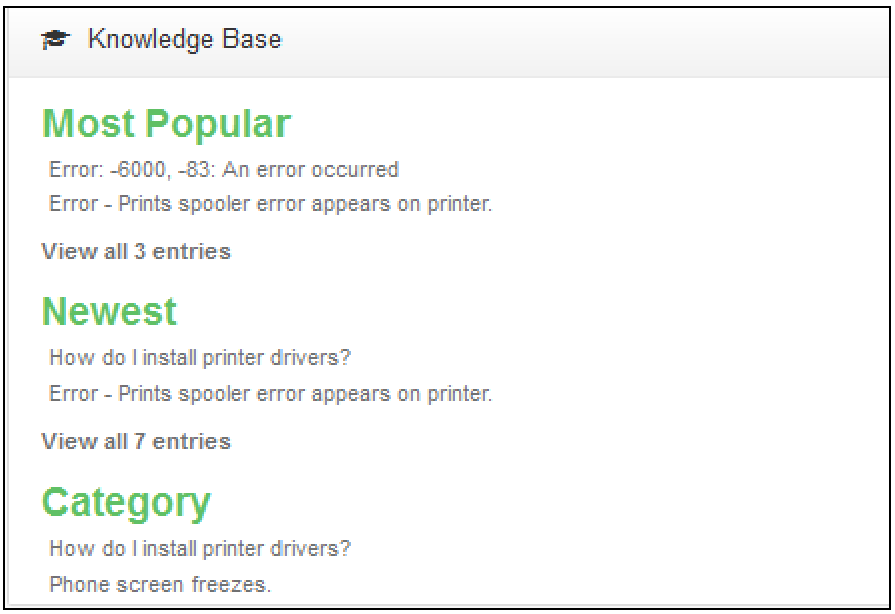
Knowledge Base

You can display knowledge information on mySupport in feeds and in components.

- From a navigator link, you can display a full-screen feed of knowledge entries with a search bar at the top.

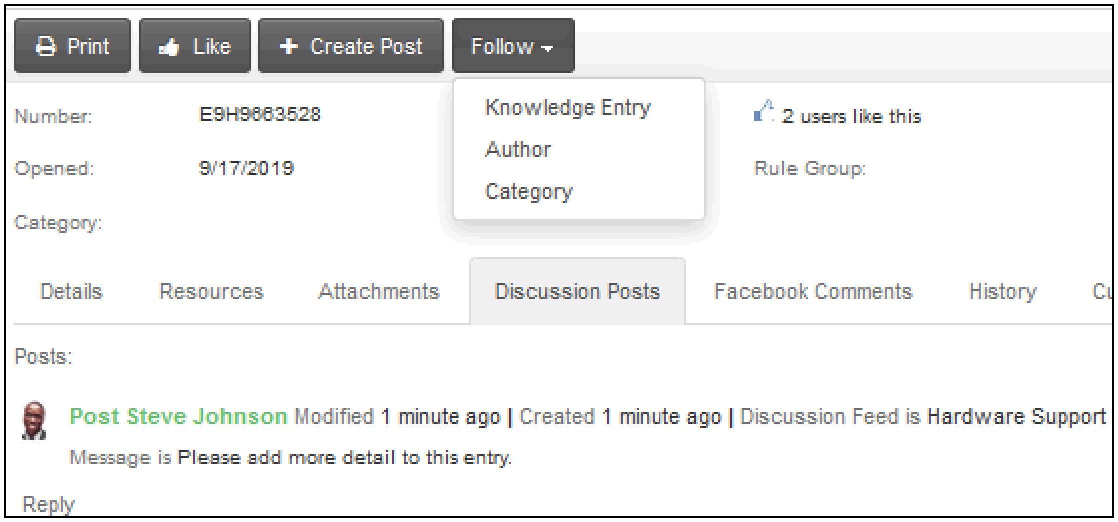


- In the Knowledge Base component, you can display knowledge entries in sections for Most Popular, Newest, and Category.



Knowledge entries can be designated with a status of Approved External - Requires Authentication or Approved External; knowledge entries appear on a mySupport portal according to assigned status. A mySupport portal designated as Public Knowledge Only will include only knowledge entries with an Approved External status.

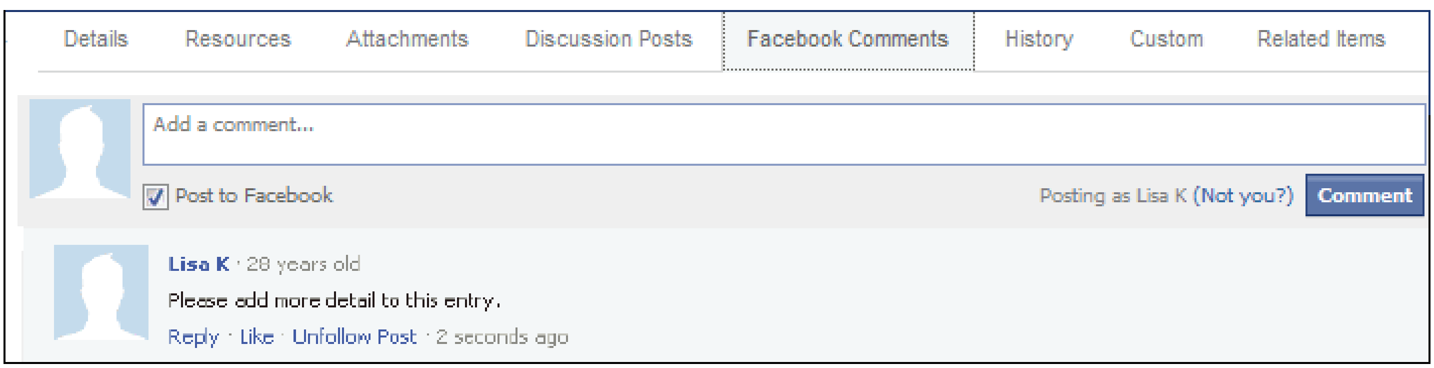
If configured, customers can follow a knowledge entry, its author, and/or its category (if categories are enabled to display on a mySupport portal).



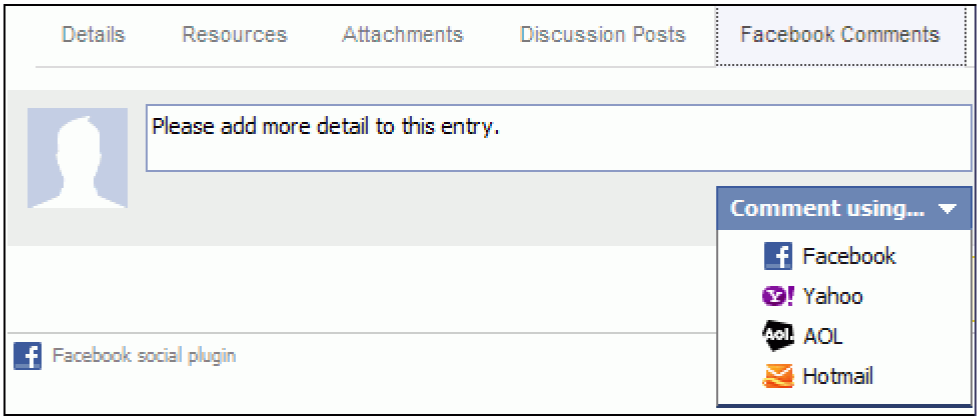
- Following a knowledge entry will cause updates to reload the entry in the Global News Feed.
- Following an author will cause any entries created by the author to appear in the Global News Feed.
- Following a category will cause any entries created with the same category to appear in the Global News Feed.

If the Facebook Comments tab is configured to appear in the Knowledge Entry screen, and a customer is currently logged into Facebook, he/she can enter a comment and click the Comment button to post it to the knowledge entry. If you select Post to Facebook, it will also go on your Facebook wall with a link back to the knowledge entry.

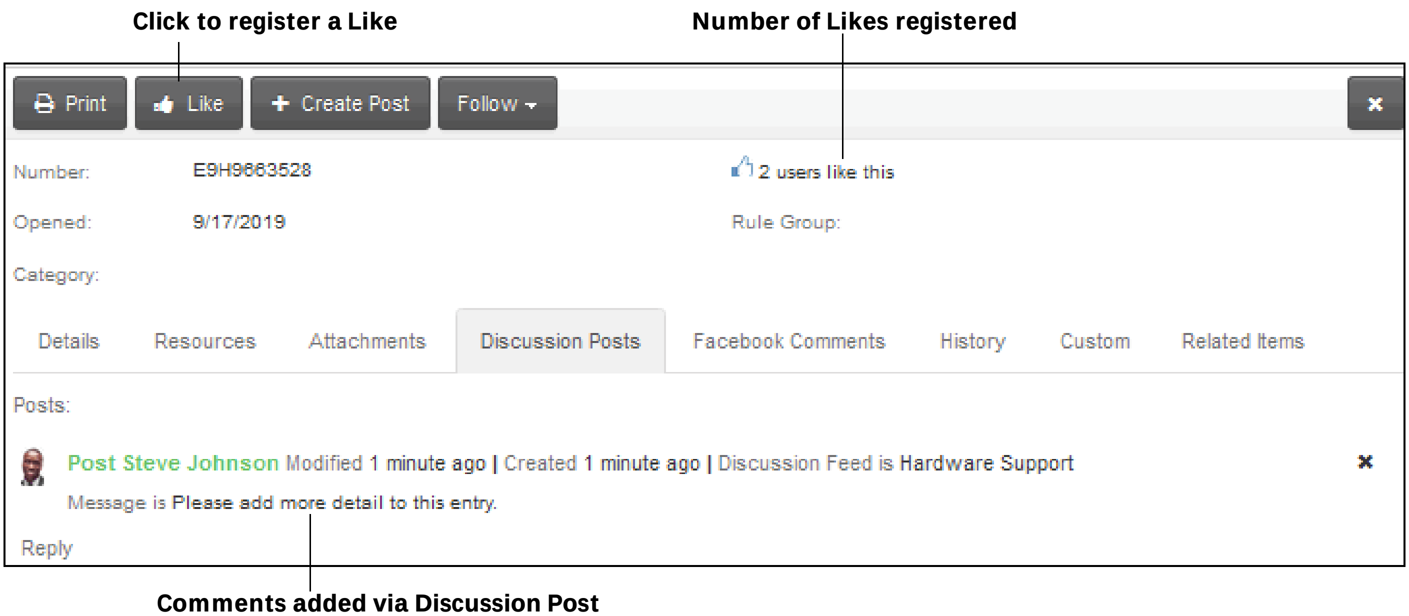
If the customer does not post to Facebook, the comment will be added as follows:



If the customer is not logged into Facebook, the Comment Using dropdown could be used to log into Facebook via Facebook, Yahoo, AOL, or Hotmail.

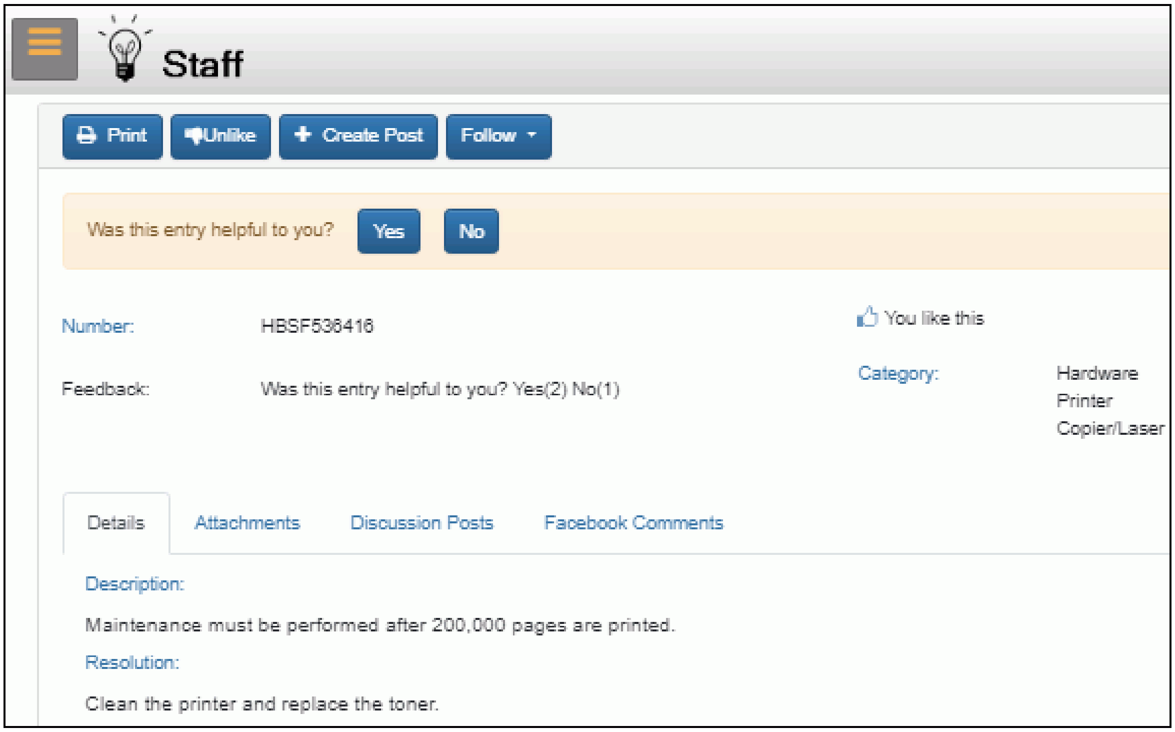


If the Facebook Comments tab is **not** configured to appear in the Knowledge Entry screen, customers can use the Create Discussion Post button to enter comments. Authentication is required in order to post a comment, and discussion posts aren't included in history. If the Discussion Post tab is configured to appear in knowledge entries, these discussion posts will appear on the Discussion Posts tab in the knowledge entry.



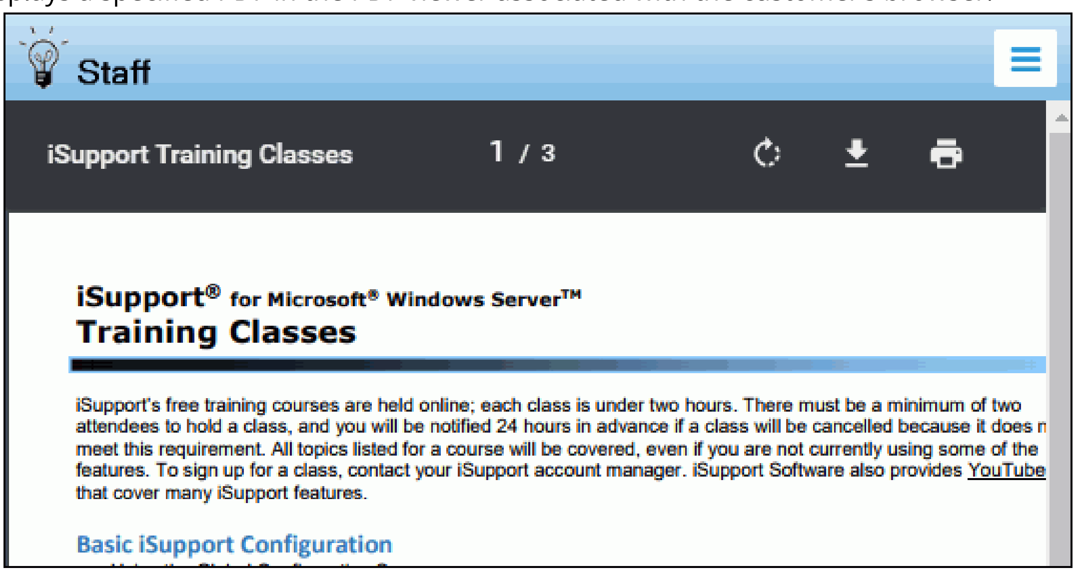
Authenticated customers can also give feedback by clicking the Like button (if configured). The number of likes can be configured to appear in the Knowledge Entry screen as well as in news feeds. After a like, the Unlike button will replace the Like button in the knowledge entry.

A question with two response choices can be included at the top of the knowledge entry screen. Use the Knowledge Management Feedback tab in Feature Basics to configure this feature.



Link to PDF

This feature displays a specified PDF in the PDF viewer associated with the customer's browser.

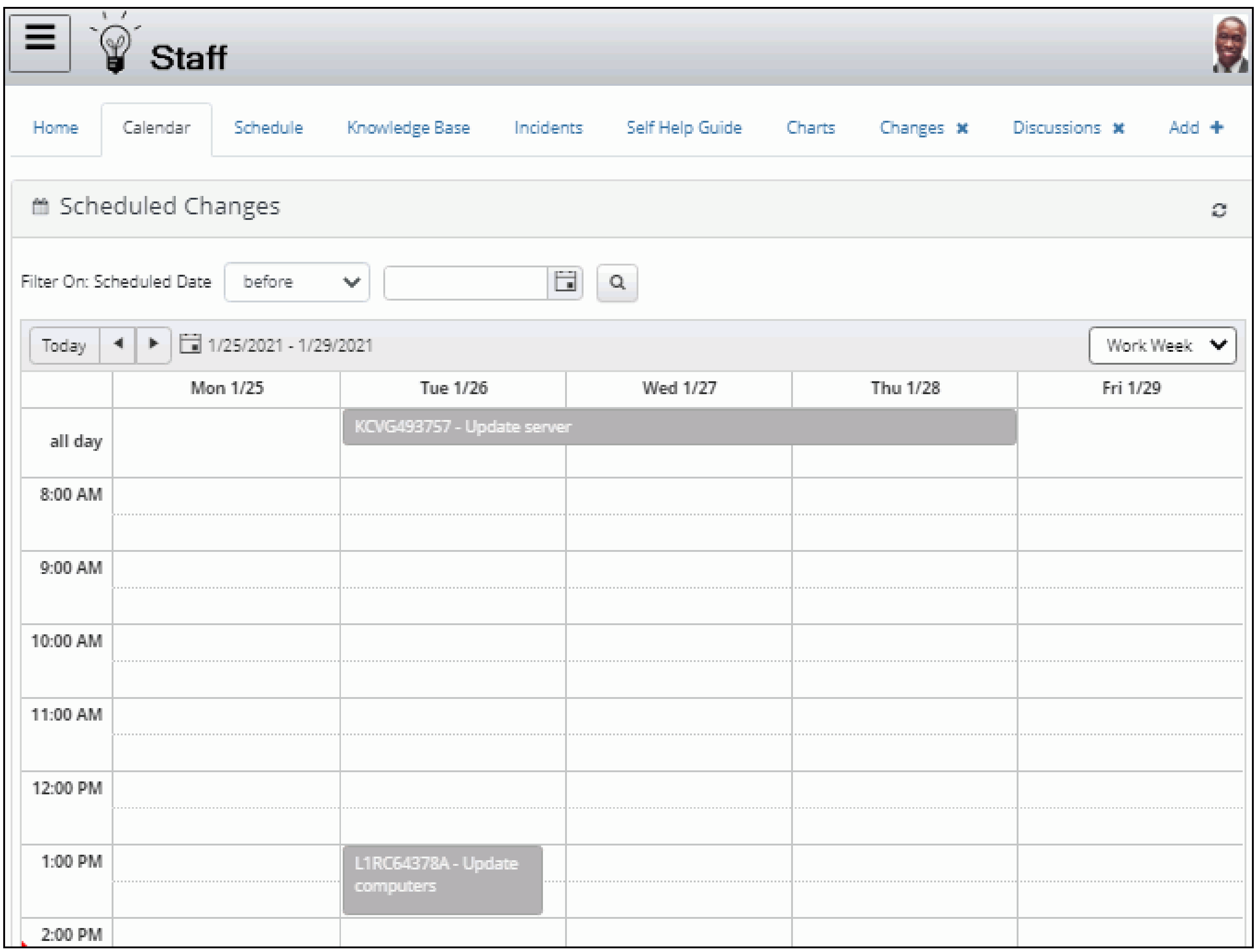


Rich Text Area

This feature enables entry of formatted text, images, and links in a component.

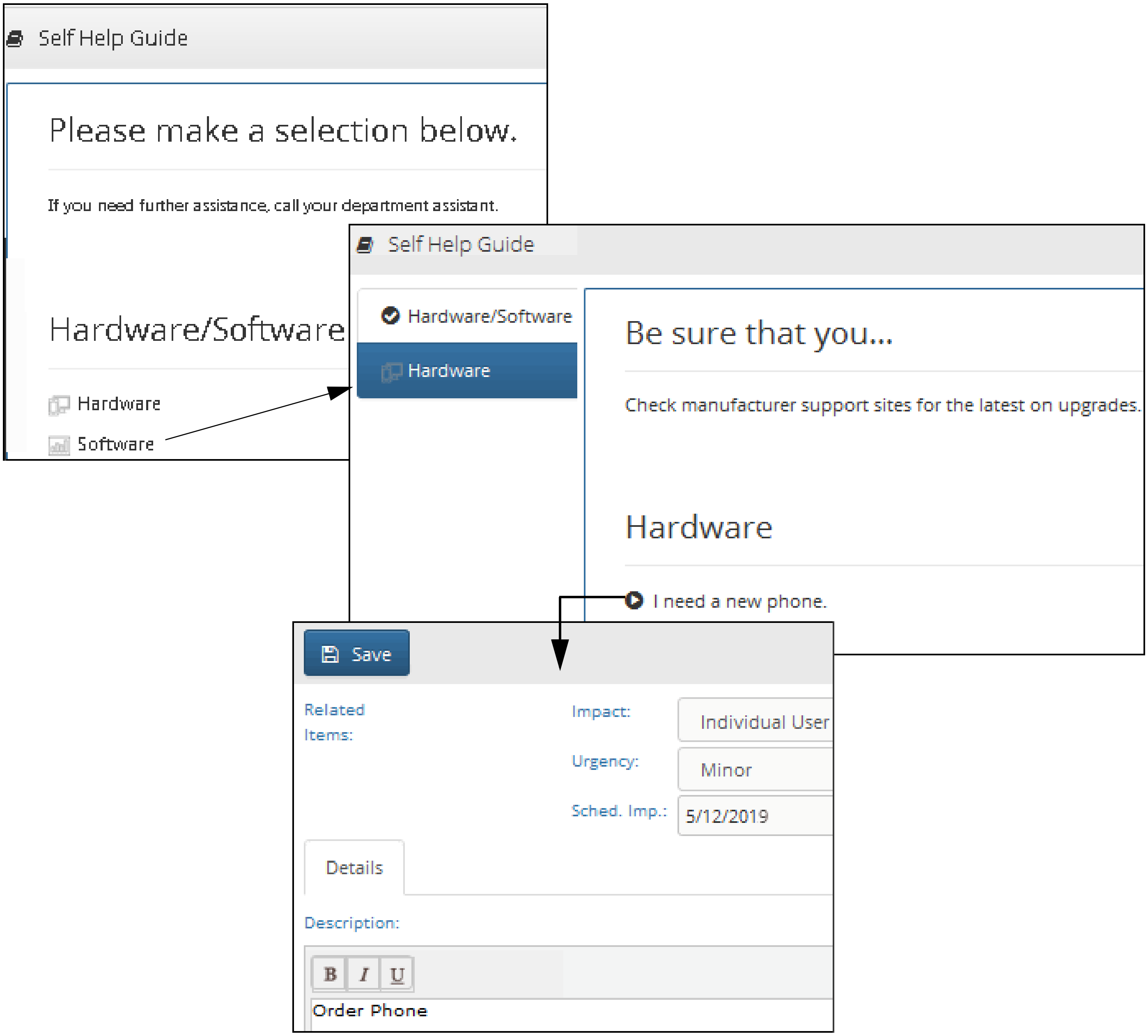
Scheduled Changes

Add a scheduled change calendar to a mySupport portal dashboard via the Event Calendar and Scheduled Changes Designer components in the mySupport Portal configuration screen. The calendar will only show changes that the logged in customer has mySupport permissions to view. When the customer clicks a listed event, the change will open with the mySupport change display layout linked with their associated mySupport options.



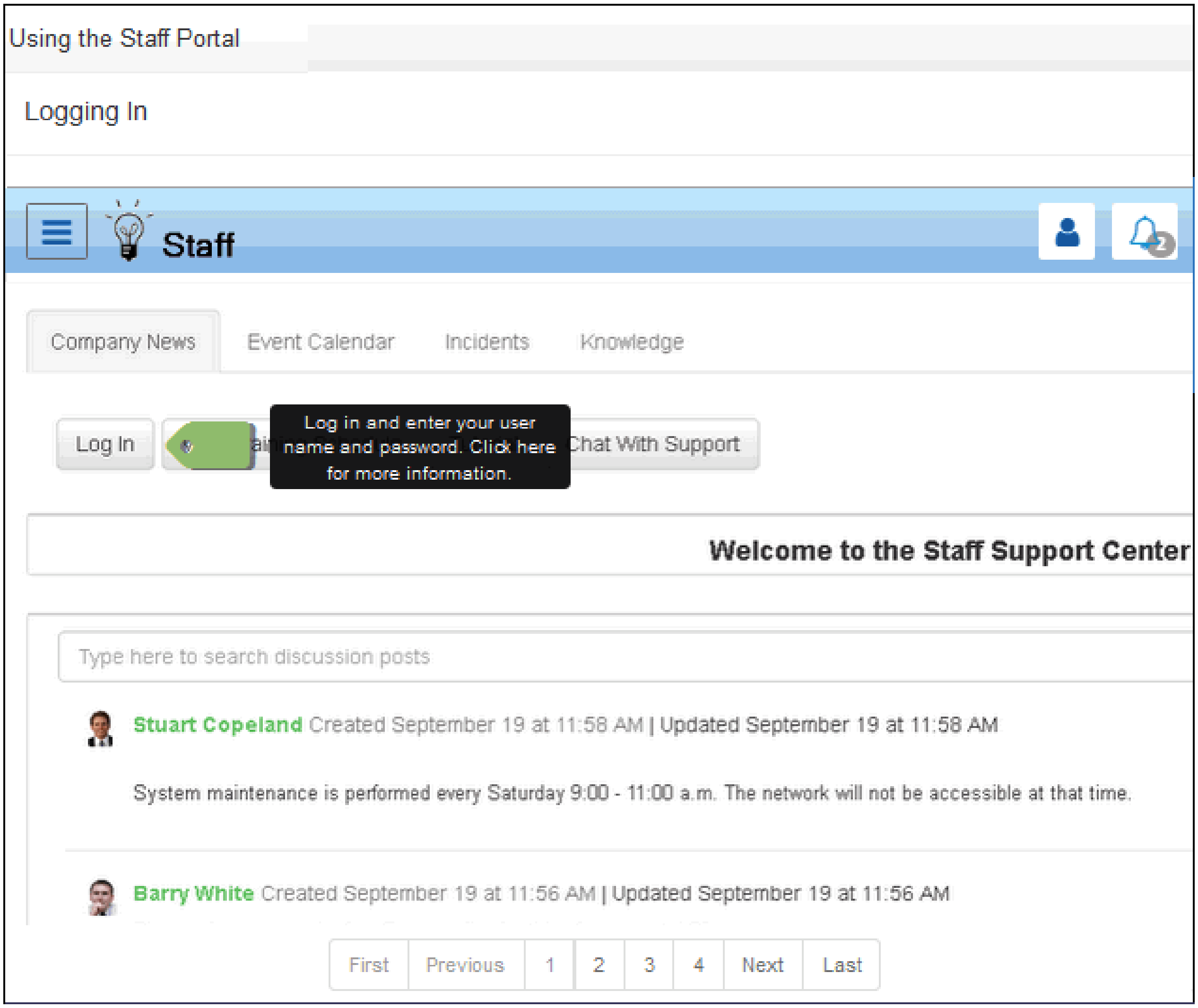
Self Help Guide

Self help guides contain decision tree style prompts to lead a user to a template, FAQ, knowledge, or help topic. Customers simply select items until the result appears. These guides can be accessed by clicking the link (labeled I Need Help by default) in the search bar; a navigator link to one self help guide or all self help guides can be used.

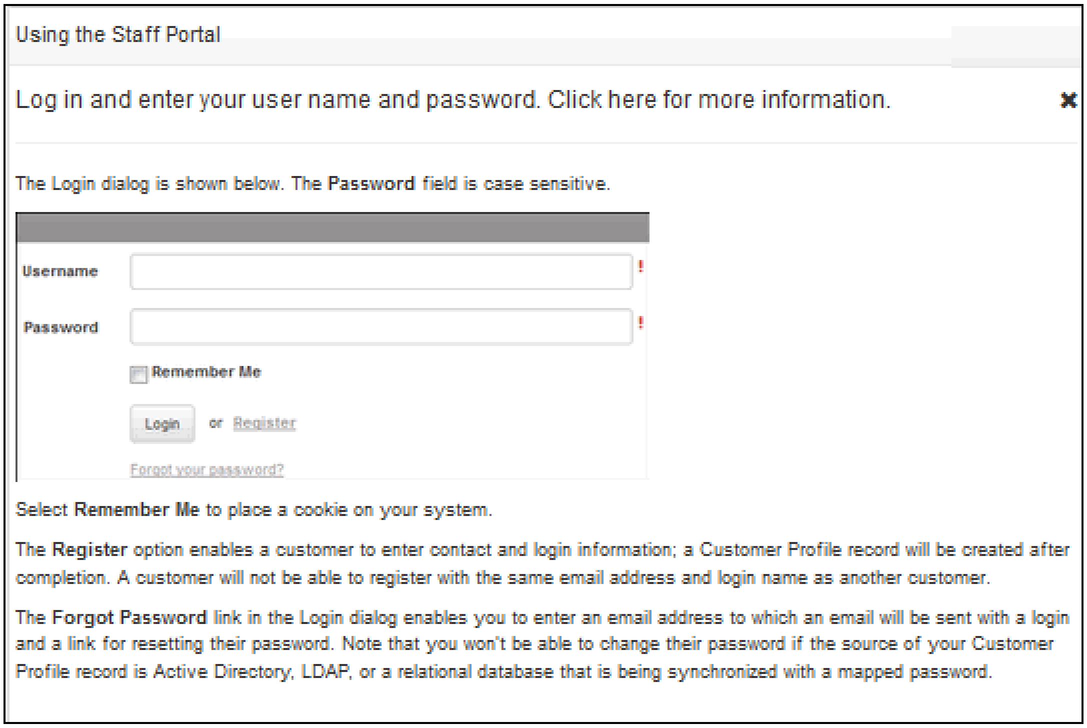


Tutorials

Use tutorials to provide information to support representatives and customers. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content. You can associate a tutorial with a navigator link or a button, a dashboard, or mySupport work item submit or display layout.

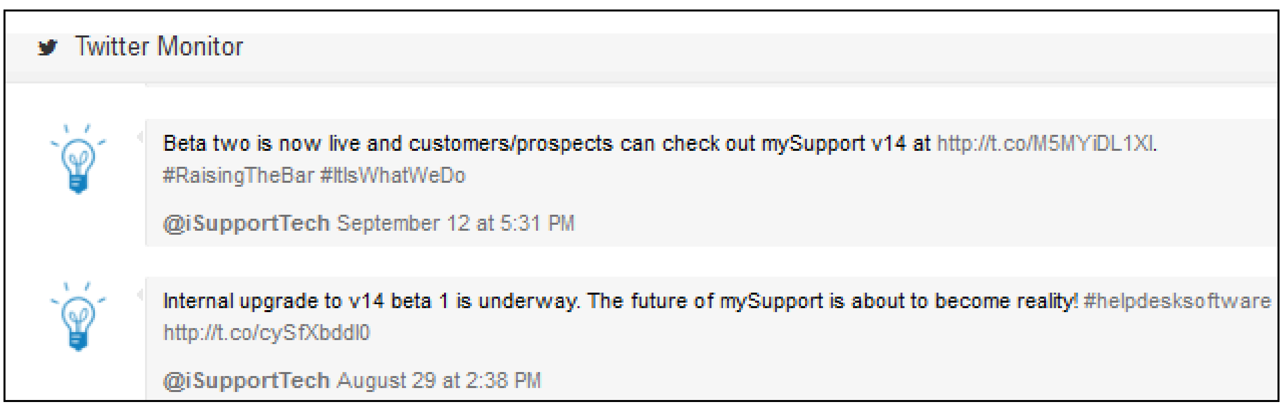


You can display images, videos, links, and formatted text in the screen that appears when a user clicks a tag. Use the Options and Tools | Customize| Tutorials screen to create tutorials; see the online help for more information.



Twitter Monitor

The Twitter Monitor component searches Twitter and displays tweets that include a specified search term, or it can display tweets for a specified Twitter account, for the last 90 days. See "Twitter Monitor" on page 118 for configuration information.



Communication Features

Chat

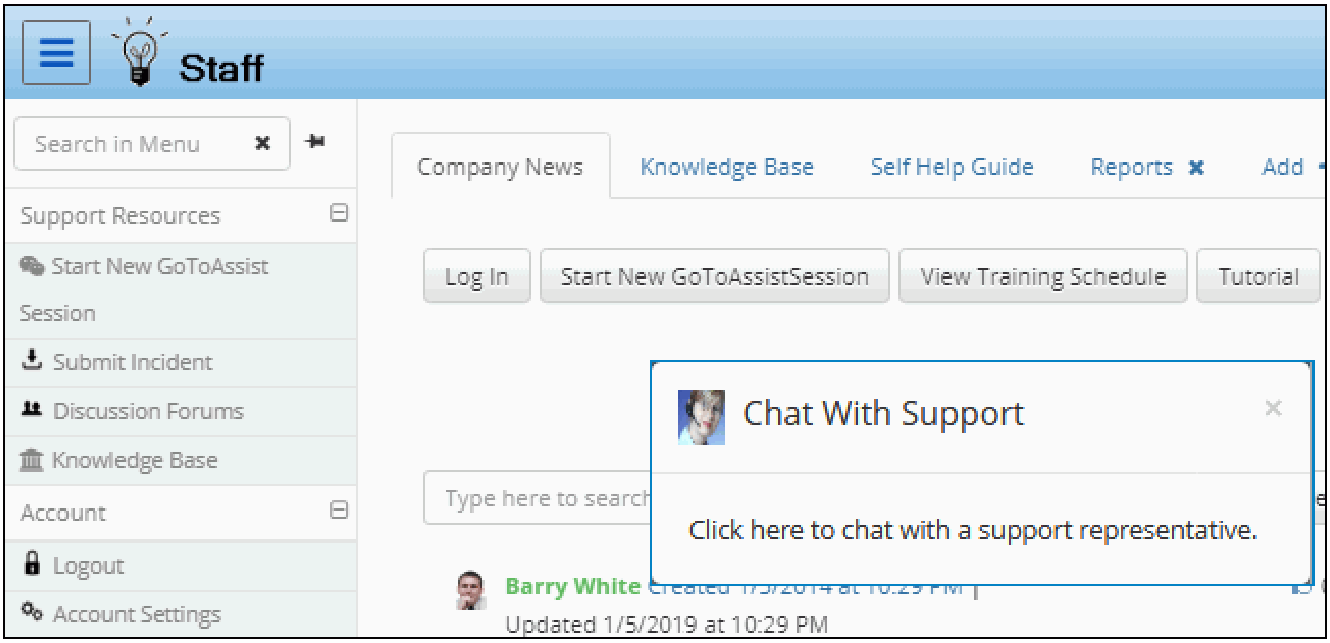
Customers can chat on mySupport portals via Bomgar, Citrix GoToAssist Remote Support, and iSupport's built-in chat feature.

BeyondTrust Chat

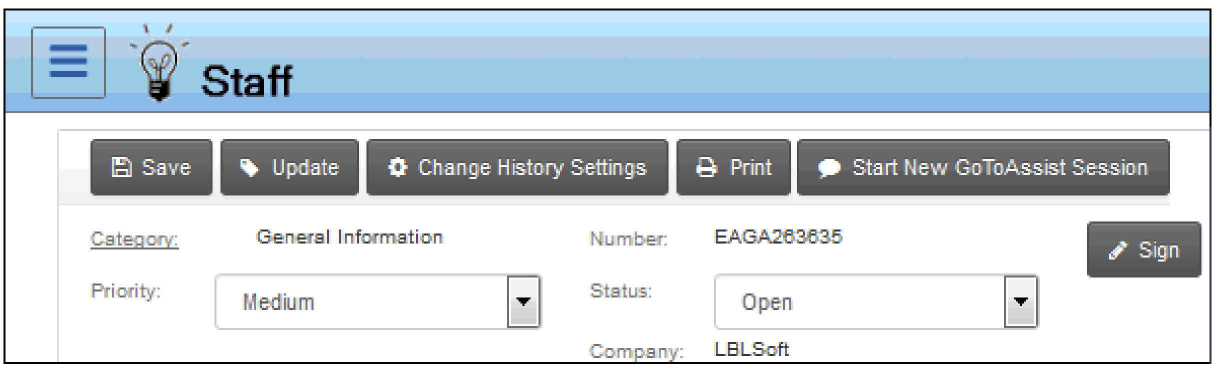
iSupport integrates with BeyondTrust for remote desktop connection and chatting. (Note: BeyondTrust is a third party application; BeyondTrust software and licenses must be purchased through BeyondTrust.) Contact iSupport Software Technical Support for more information.

Citrix GoToAssist

iSupport integrates with Citrix GoToAssist Remote Support, enabling customers to access the Citrix® GoToAssistPortal. (Note that this functionality does not automatically capture chats or add recorded sessions.) You can include GoToAssist on mySupport via a component button, a flyout dialog, and/or navigator link. For information on configuring GoToAssist chat on mySupport portals, see "Configuring Citrix GoToAssist Remote Support Access" on page 82.



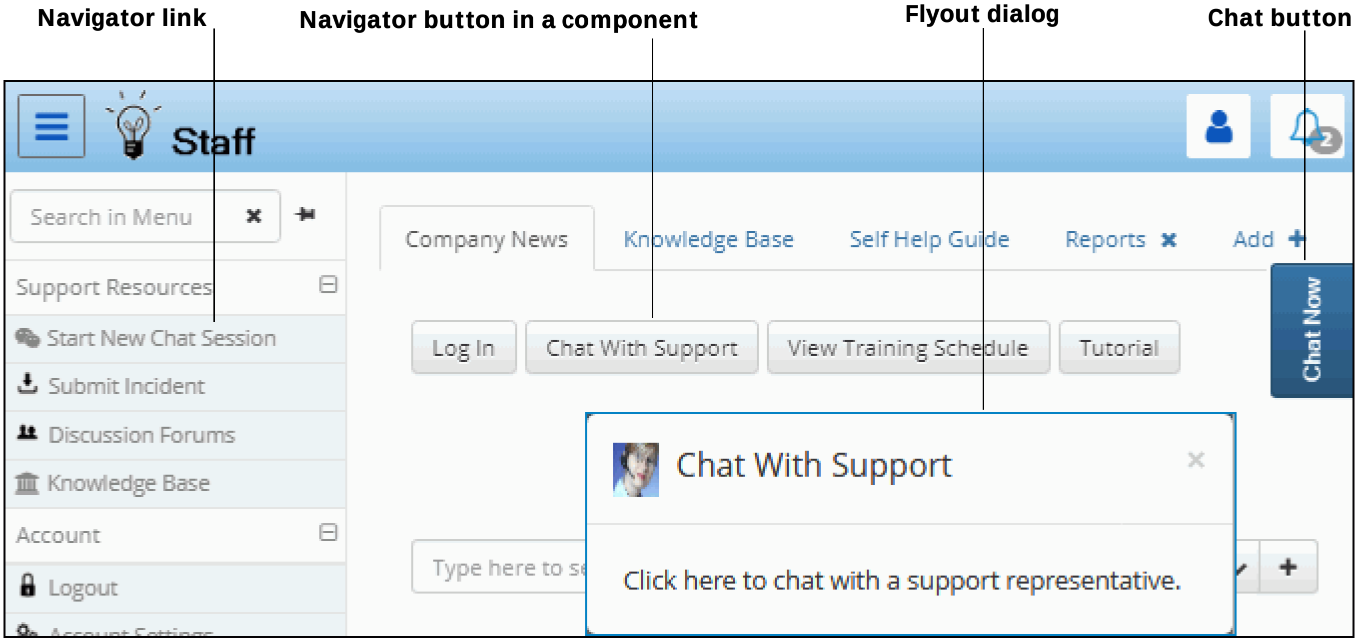
- You can also include a button in the Display Incident screen.



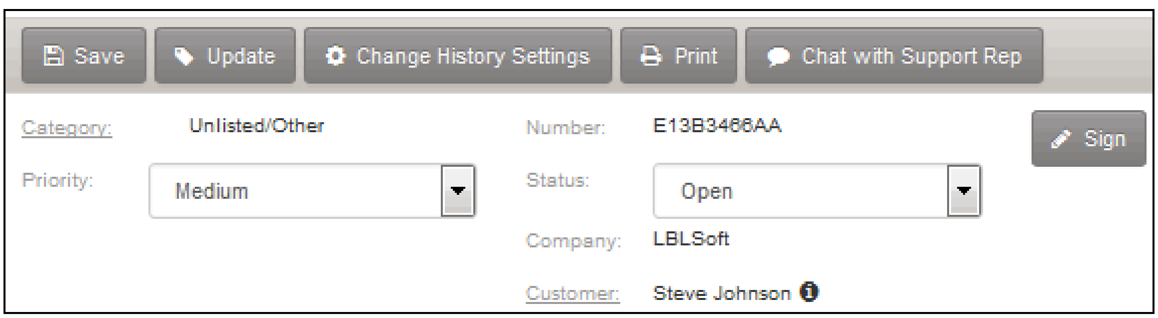
mySupport Chat

iSupport includes a built-in chat feature that enables you to configure chat responses, display chat to customers that are not authenticated, set up support representative availability, and automatically create incidents with chats in incident history. For information on configuring chat on mySupport portals, see "Configuring mySupport Chat" on page 78.

You can enable access to mySupport chat via a navigator link, component button, a flyout dialog, and/or button that you can position on the screen.



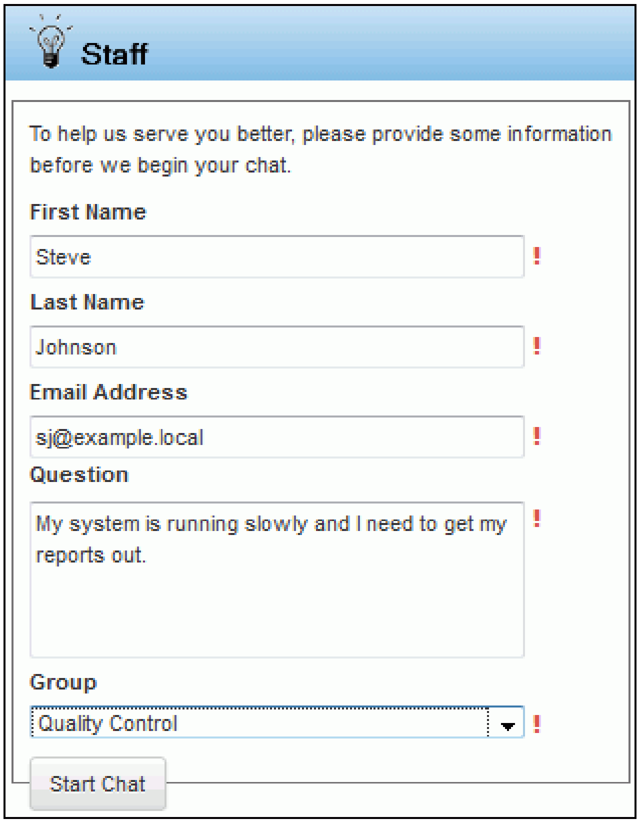
You can also include a button in the Display Incident screen.



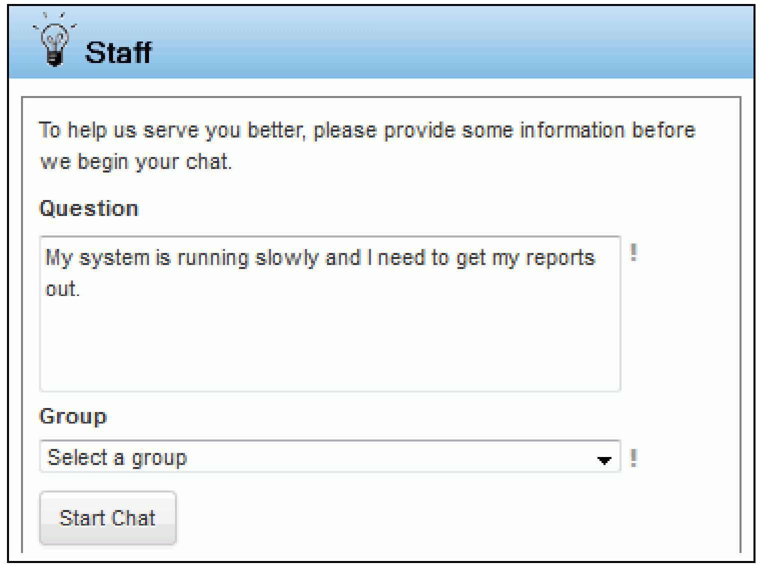
If chat is configured for users that are not authenticated, a dialog will appear for the user to enter their name, email address, and question; otherwise, a dialog will appear for the user to enter a question. The Group field will appear if enabled in the mySupport Portal Options screen and multiple groups are scheduled as available in the Support

Representative Groups screen. If no one is available, the button text will change to “Chat Not Available” and the chat dialog will not appear.

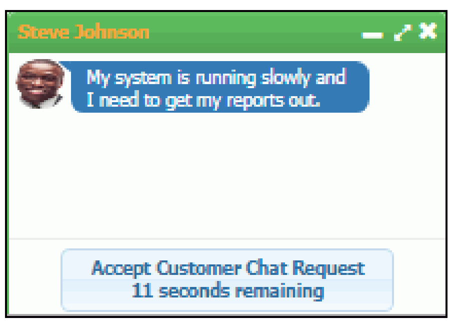
Customer not authenticated



Customer authenticated



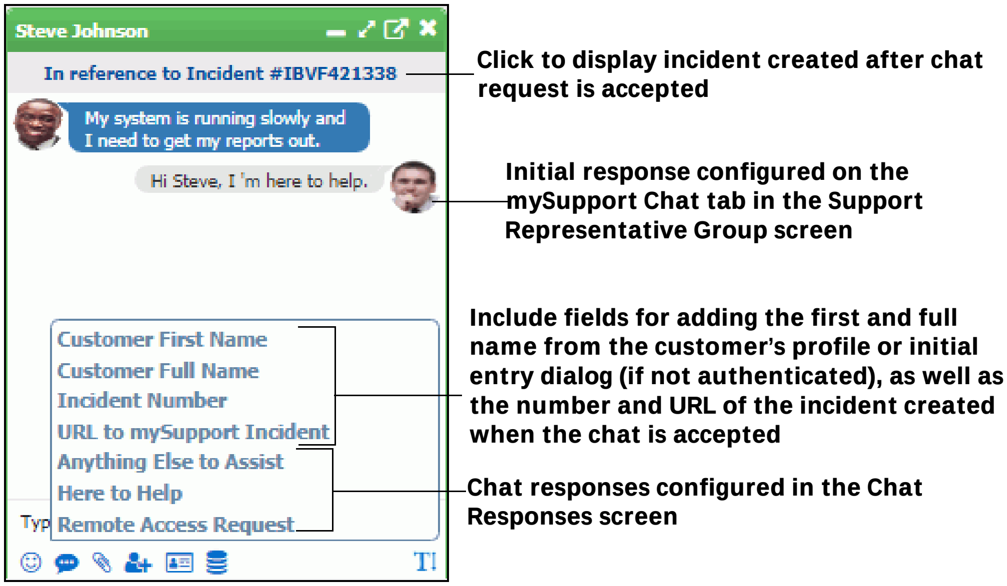
The question will appear to available support representatives with an Accept Customer Chat Request button. If enabled in the mySupport Portal Options screen, a timeout countdown will appear on it.



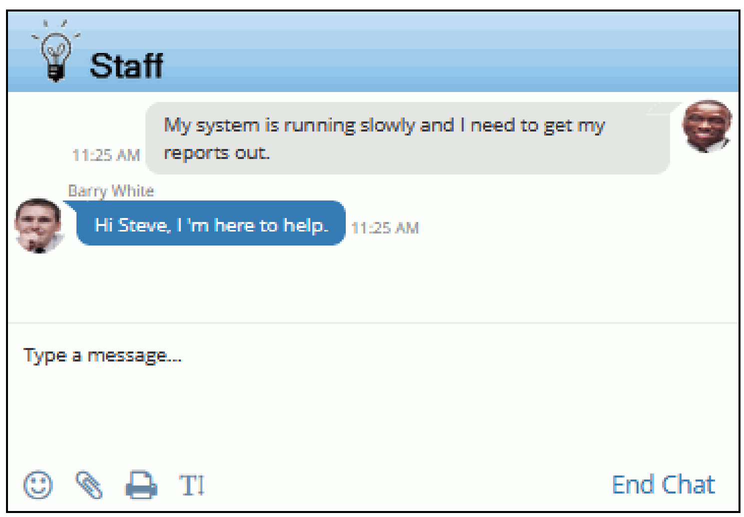
Once accepted, an incident can be created (if configured via the Support Representative Group screen) with the number as a link at the top of the chat dialog for the support representative to open the incident. The configured response will display to the customer. The following will be included in the entry area:

- emoticon which will display a menu of emoticons for use in responses.
- Chat Responses which will display include fields and the responses (defined in the mySupport Chat Responses configuration screen) for support representatives to use. The include fields can display the first and full name from the customer’s profile or initial entry dialog (if not authenticated), as well as the number and URL

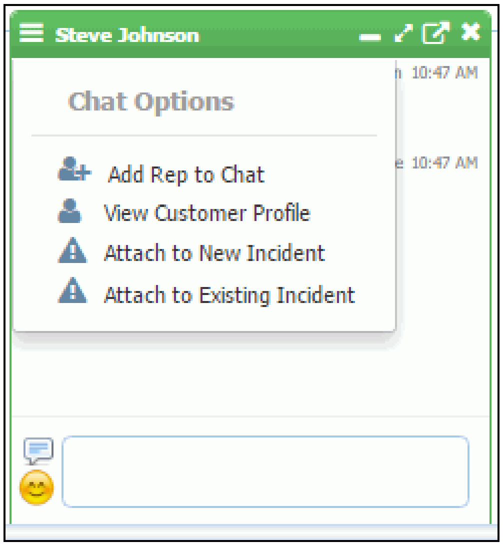
of the incident created when the chat is accepted. Chat responses will overwrite any existing text in the entry area; include fields will append values to existing text.



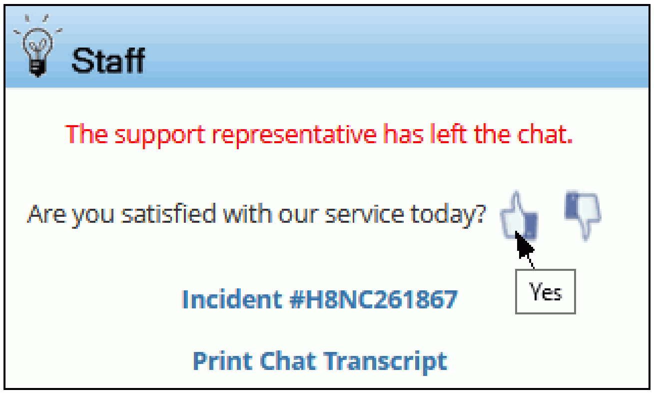
- For customers, a Print Chat Transcript option. The customer chat window is shown below; customers can use emojis and print the chat transcript while a chat is in progress.



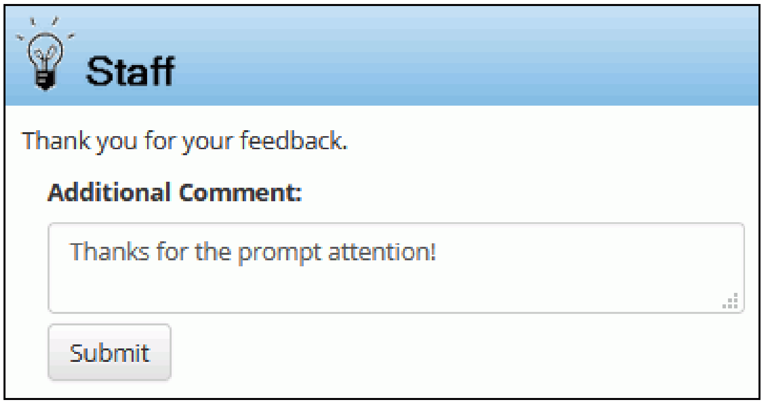
Support representatives can use the Options menu in the chat window to select other support representatives to be included in the chat and open the customer's Profile record, If incidents are not configured to be created automatically, options will be included for adding the chat transcript to the history of a new or existing incident.



When the support representative ends the chat, a feedback question can be configured to display in the customer's chat window. Note that the text indicating that the support representative ended the chat is also configurable.

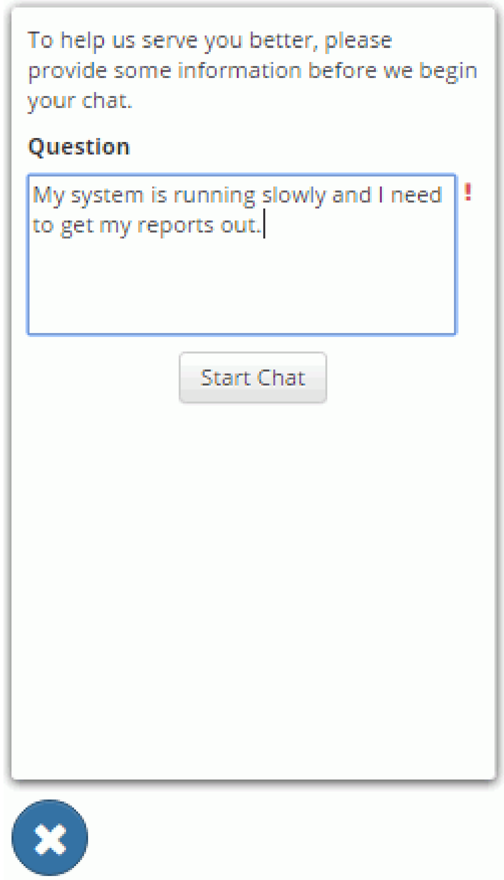


After selecting a response, another dialog will appear for entering any comments.



External Chat

You can the enable iSupport's mySupport Chat feature to be hosted on other web sites. You can configure the size and positioning of the chat window and designate the sites that can use the feature.



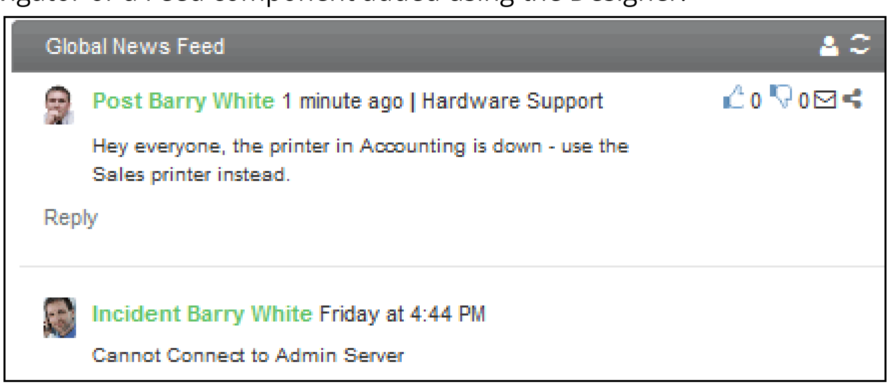
Discussion Feeds

Customers can create, view, reply to, and share discussion posts on shared discussion-only news feeds that are created by support representatives via the News Feed component on the Desktop.

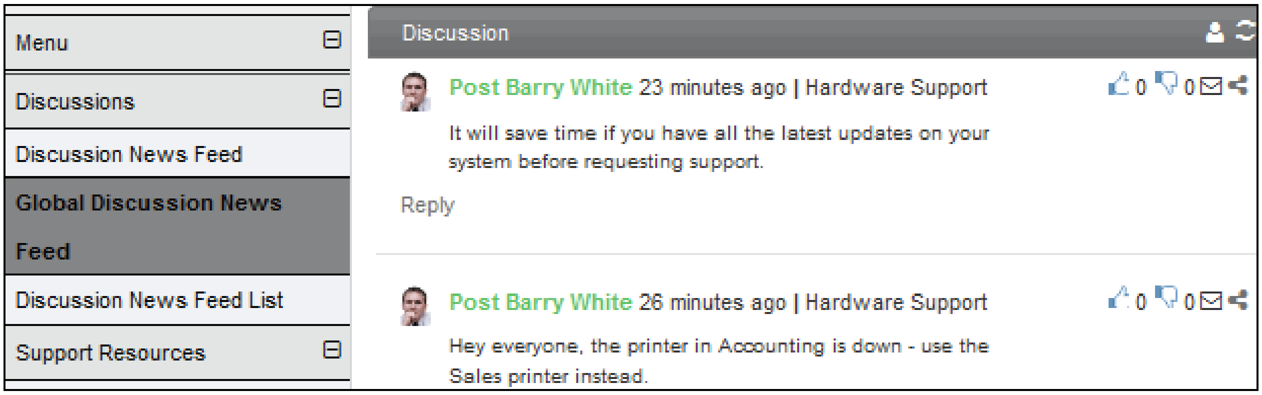
Viewing and Sharing Discussion Posts

Discussion posts can be included on a mySupport portal in several ways:

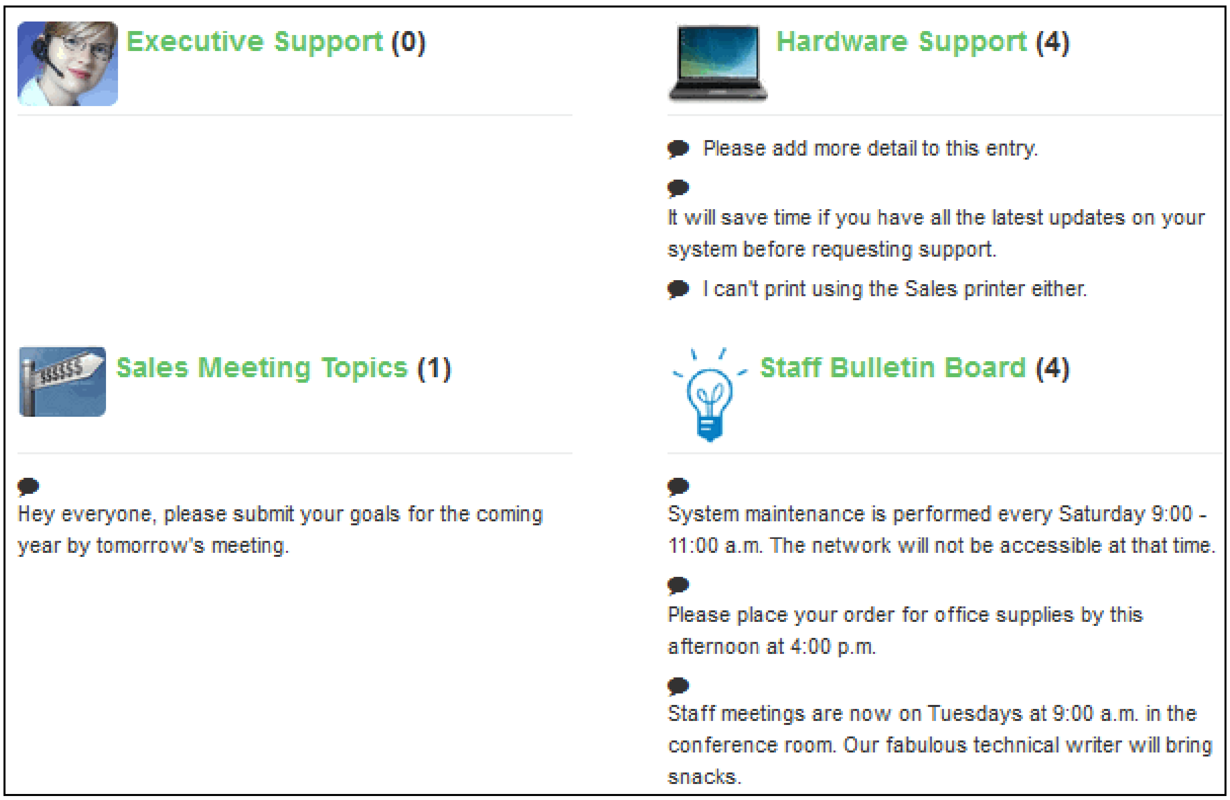
- **All discussion posts can be included along with other work items** via a configured Global News Feed link on the mySupport navigator or a Feed component added using the Designer.



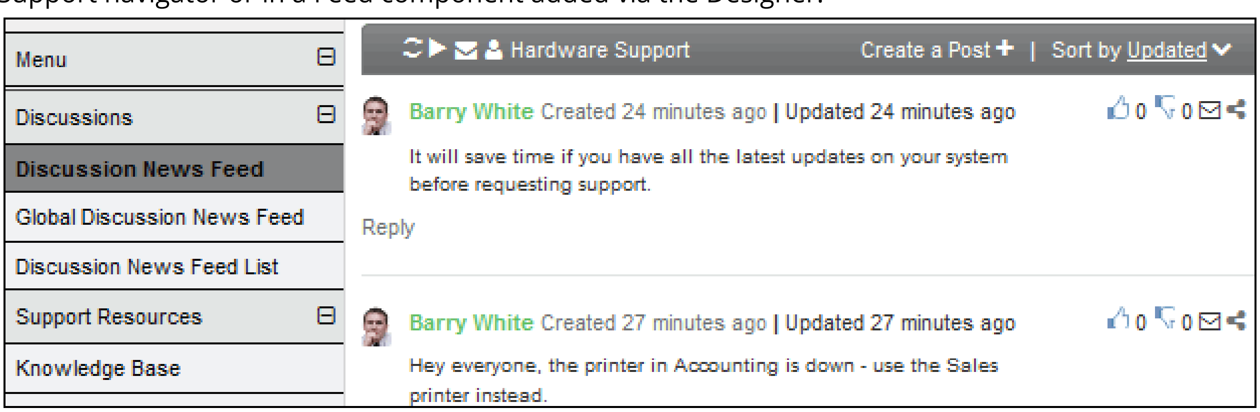
- **All discussion posts can be included in one feed** via a configured Global Discussion News Feed link on the navigator.



- A **list of all discussion-only news feeds** can be displayed from a configured Discussion News Feed List link on the navigator.

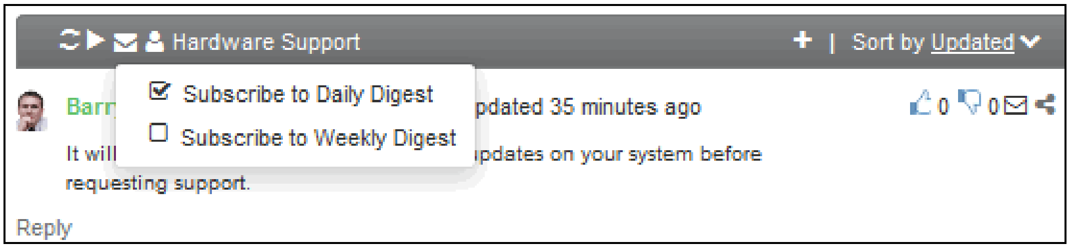


- A **specific discussion news feed** can be displayed from a configured Discussion News Feed link on the mySupport navigator or in a Feed component added via the Designer.



Available Options for Discussion Feeds

- The **discussion digest** option to subscribe to an email regarding news feed activity that can be sent daily or weekly.

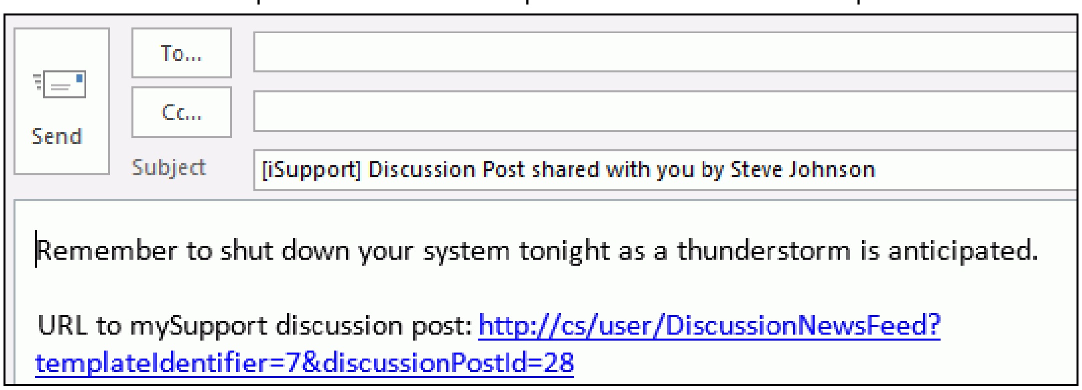


- The Auto Refresh On and Off options start and stop automatic refresh of the news feed (but replies and your posts will still appear). The pause will be released when a customer manually refreshes the component, creates a post, or when the page is reloaded.
- The View My Posts Only option on global news feed and on specific discussion feed restricts the posts in the feed to only those created by the customer.

Note: If you want to have the discussion digest, auto refresh, and view my posts only options available for a discussion feed, you'll need to use a navigator link or component with a header. These options will not be included if you include a discussion feed in a component without a header.

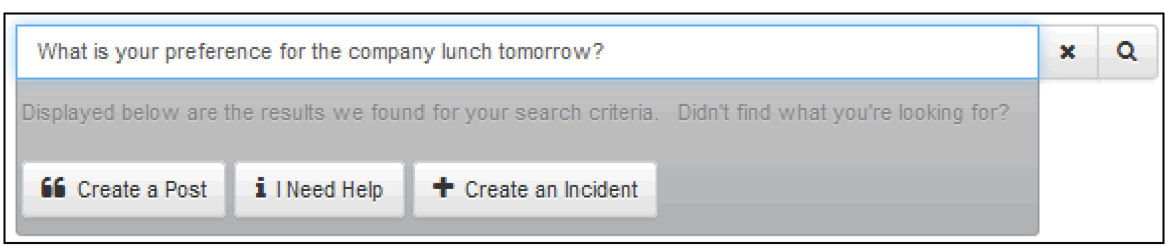
Available Options for Discussion Posts

- The **Follow This Post** option enables an email notification to be sent when someone replies to the post. Notification content is created via the Discussion Post /Default tab in the Configuration | Email | Custom Notifications screen; it is selected for the discussion feed via the Customer Follow Notification field in the Discussion Posts section of the configuration dialog for the news feed on the Desktop.
- If Allow Customer Share is configured for a news feed (via the configuration dialog for the news feed on the Desktop), the **Share This Post** option enables a customer to email the post. The customer's mail client will appear with the content of the post and a link to the post as shown in the example below:

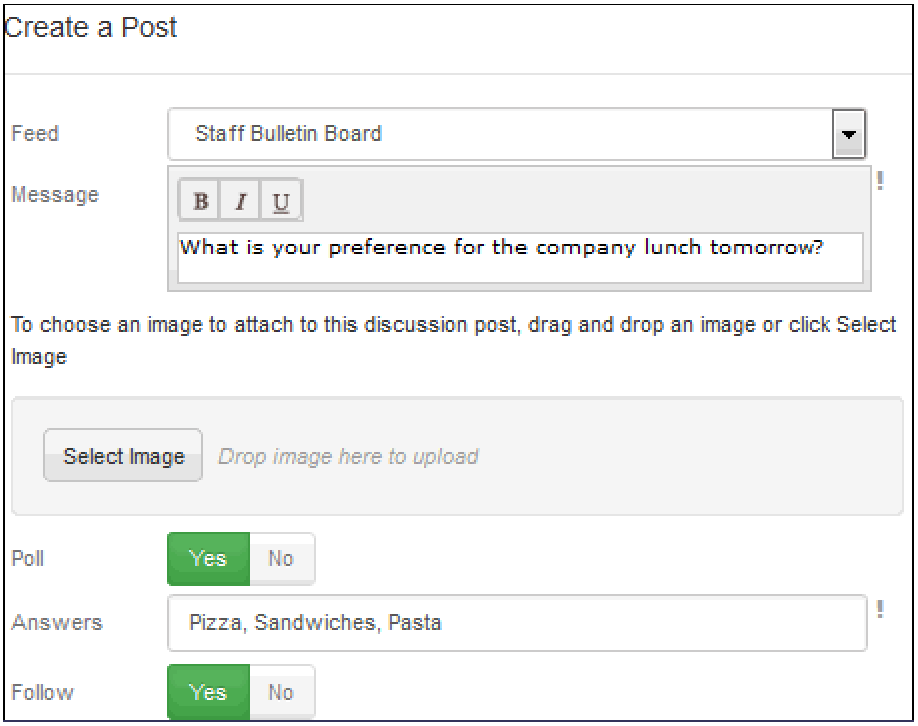


Creating and Editing Discussion Posts

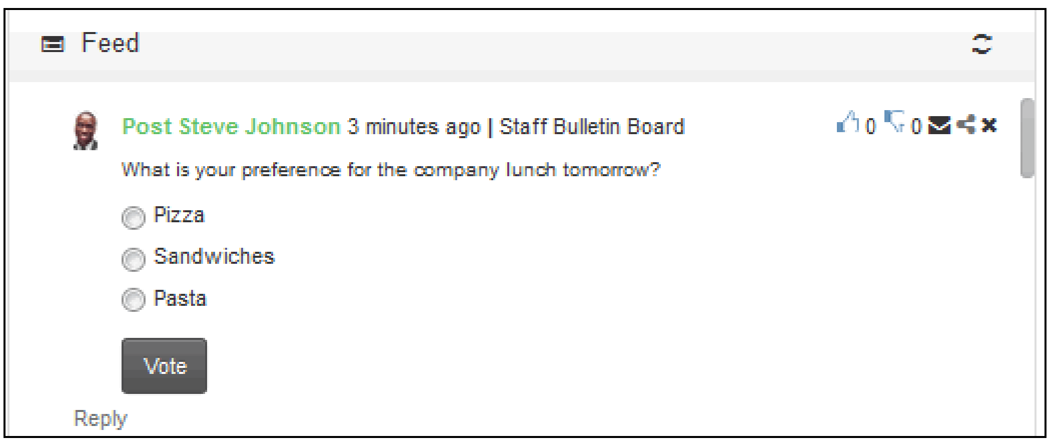
If configured, authenticated customers can access the Create a Post link on a feed, on an individual knowledge entry, or under the Global Search field after text is entered (shown below). Note that access to post and reply creation for customers and customer groups can be controlled via the Desktop News Feed configuration dialog.



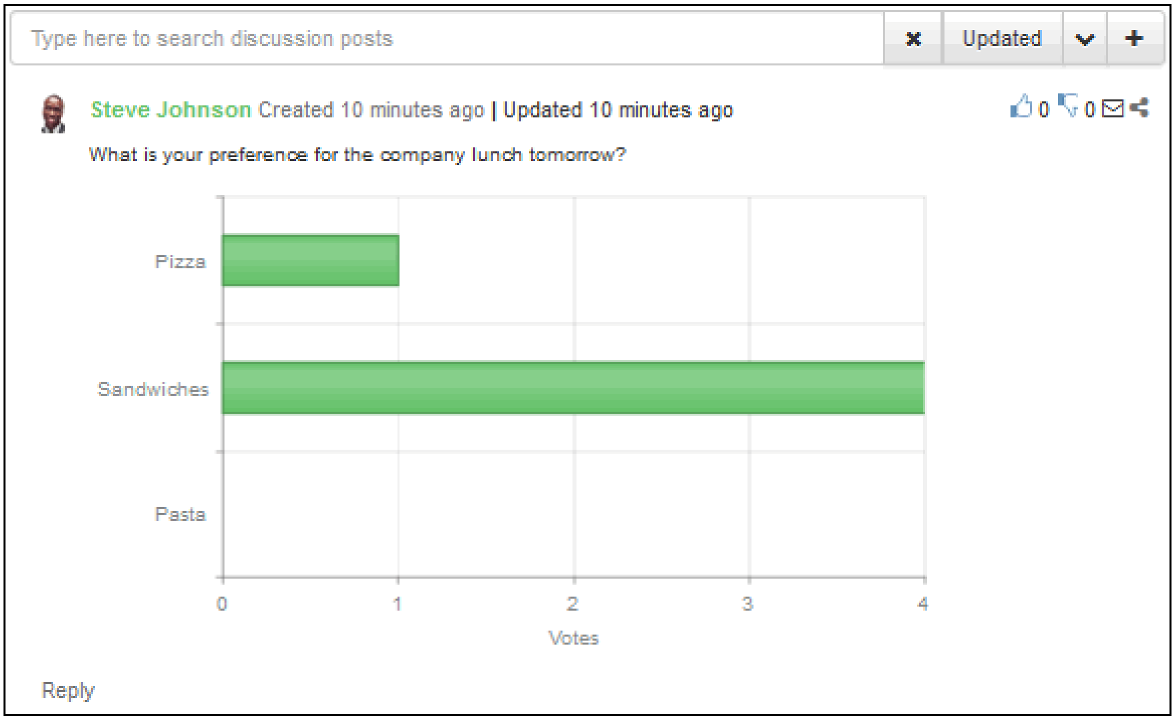
While creating a post, customers can format the post, select an image to include, and create a poll-type post with radio button response options.



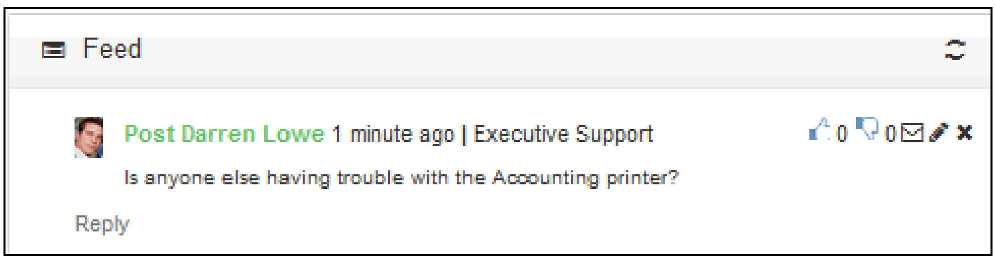
The poll post will appear with radio button response options as shown below. Poll posts will display only to authenticated users.



After the user selects a response, the results will appear in a graph:



After a customer creates a discussion post, an Edit option will appear to the customer for 15 minutes.



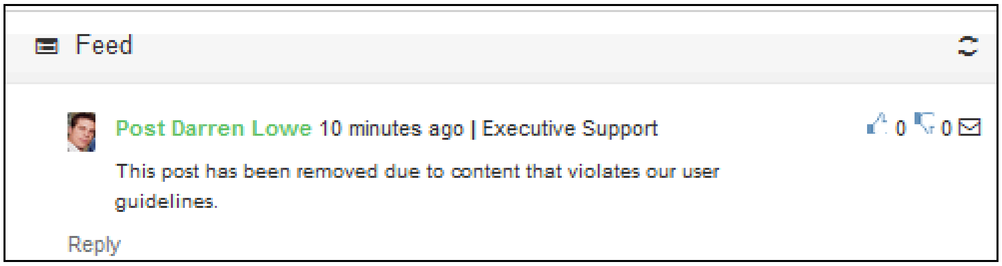
The Follow option in the Create a Discussion Post dialog enables an email notification to be sent when someone replies to the post. A user's first discussion post or reply will determine the default for the Follow option in the Create Discussion Post dialog this default can be changed in Account Settings.

Removing and Deleting Discussion Posts

Discussion posts and replies can be removed or deleted in the following ways:

- A customer can remove a post that he/she created if there is no reply. This will delete the post entirely. A support representative that does not have Discussion Feed Administrator access enabled in his/her Support Rep Profile record will not be able to delete his/her own post.
- A support representative with Discussion Feed Administrator access can delete a post in a news feed if the Allow Post Deletion option is set when the feed is configured. This will delete the post entirely.
- A support representative with Discussion Feed Administrator access can remove a post in a news feed if the Allow Post Removal option is set when the feed is configured. This will hide a post from other participants viewing the feed, but the post will still be available in discussion feed views. The text "This post has been

removed due to content that violates our user guidelines." will appear in place of the entry; this text can be changed for the mySupport portal via the Resource Editor.



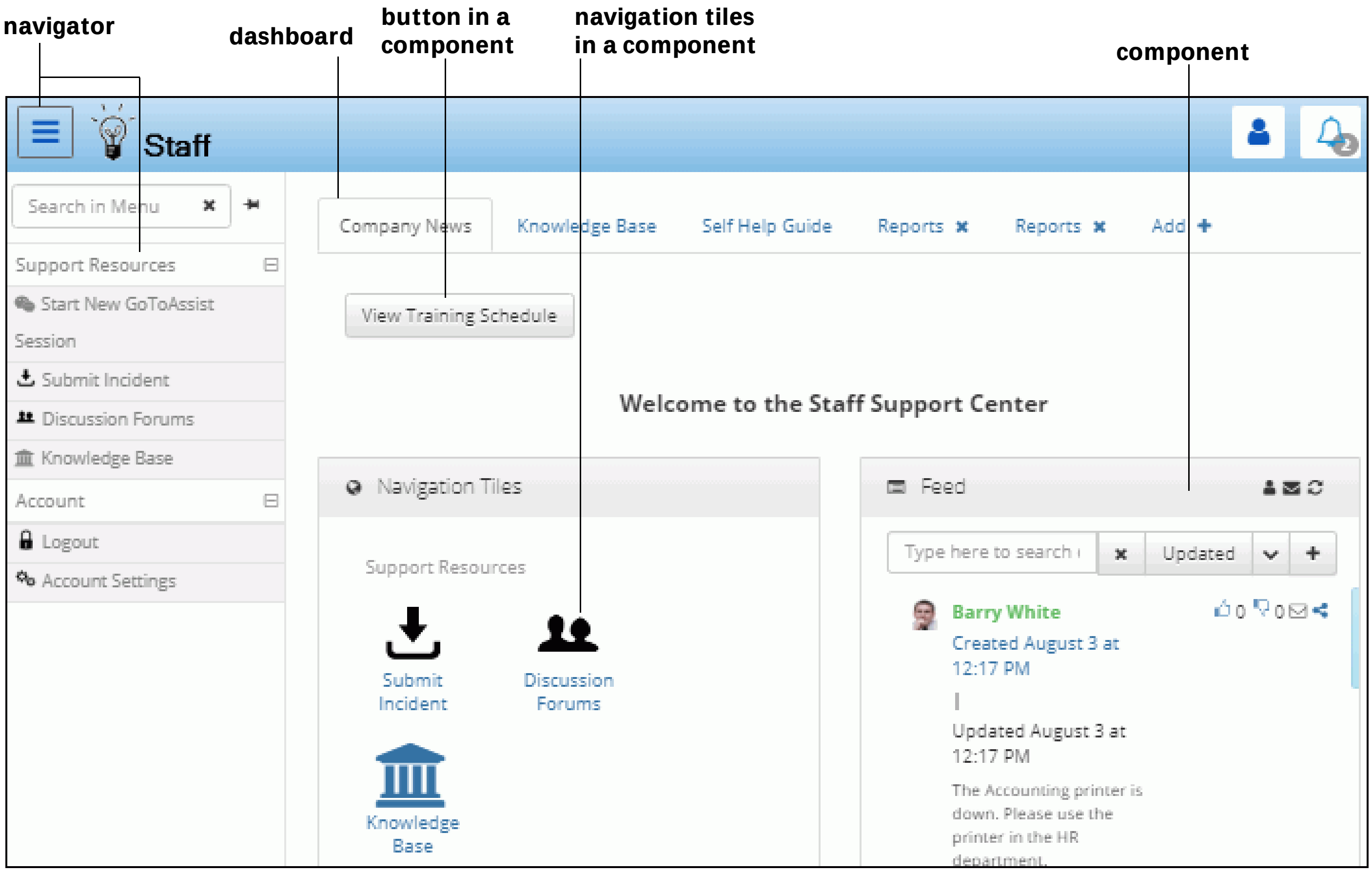
- An administrator can remove or delete a post. The text "This post has been removed due to content that violates our user guidelines." will appear in place of the entry; this text can be changed for the mySupport portal via the Resource Editor.

Configuring mySupport Portals

When designing a portal, think about the types of information you need to communicate to customers, and how you want customers to communicate with you. Decide on the features you want to implement, and then decide how to have customers access those features.

Portal Basics

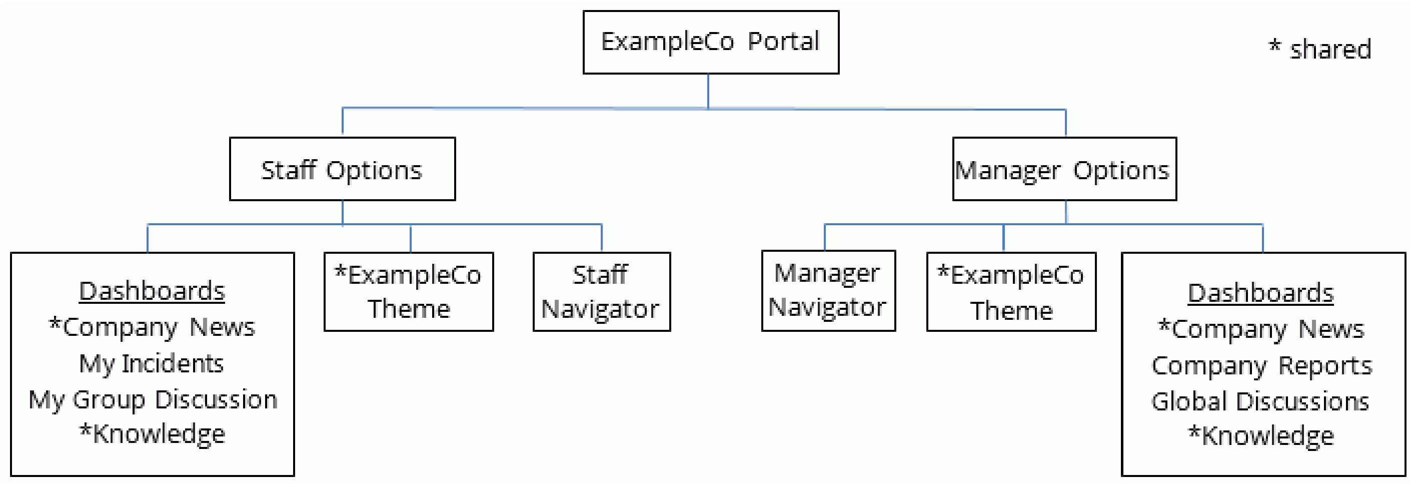
You can design a portal with components on dashboards, links on a left side navigator, and buttons and icons in a component for accessing iSupport features.



Portal configuration, done through the Portals screen, involves configuration of the following for a portal URL name:

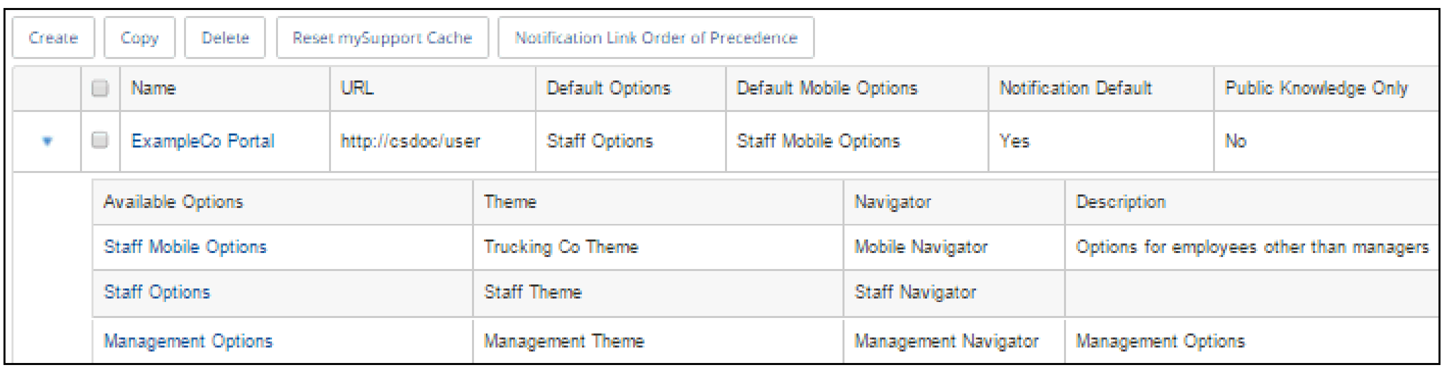
- A **theme** which includes the colors, fonts, and header image. A default set of themes is included in iSupport for you to use, copy, and modify.
- **Dashboards** which are tabbed spaces on the portal that you can label and add components to.
- A **navigator** which enables access to features and content; it can appear as a list of links on the left side of a portal, as a set of icons in a navigation tile component on a dashboard, or both.
- An **option set** which includes the settings that control how features behave, as well as settings for global features such as authentication. It is linked to a theme, navigator, and one or more dashboards. Option sets control the user experience through associations with customers, customer groups, and companies. Once mapped to a customer, customer's primary company, or customer's primary group, the navigator, dashboards, theme, and other settings configured in the option set will appear when the customer logs in.

Themes, navigators, and dashboards are individually saved and can be used by multiple option sets. In the example below, a theme and two dashboards are shared by two option sets.



Creating, Copying, and Deleting a Portal URL Name

Use the Configuration | Core Settings | mySupport | Portals list screen to create or copy a portal URL, and then use the Portal screen to create, copy, and configure the option set and associated dashboards, navigator, and theme.



Create | Copy | Delete | Reset mySupport Cache | Notification Link Order of Precedence

		Name	URL	Default Options	Default Mobile Options	Notification Default	Public Knowledge Only
▾	☐	ExampleCo Portal	http://csdoc/user	Staff Options	Staff Mobile Options	Yes	No

Available Options	Theme	Navigator	Description
Staff Mobile Options	Trucking Co Theme	Mobile Navigator	Options for employees other than managers
Staff Options	Staff Theme	Staff Navigator	
Management Options	Management Theme	Management Navigator	Management Options

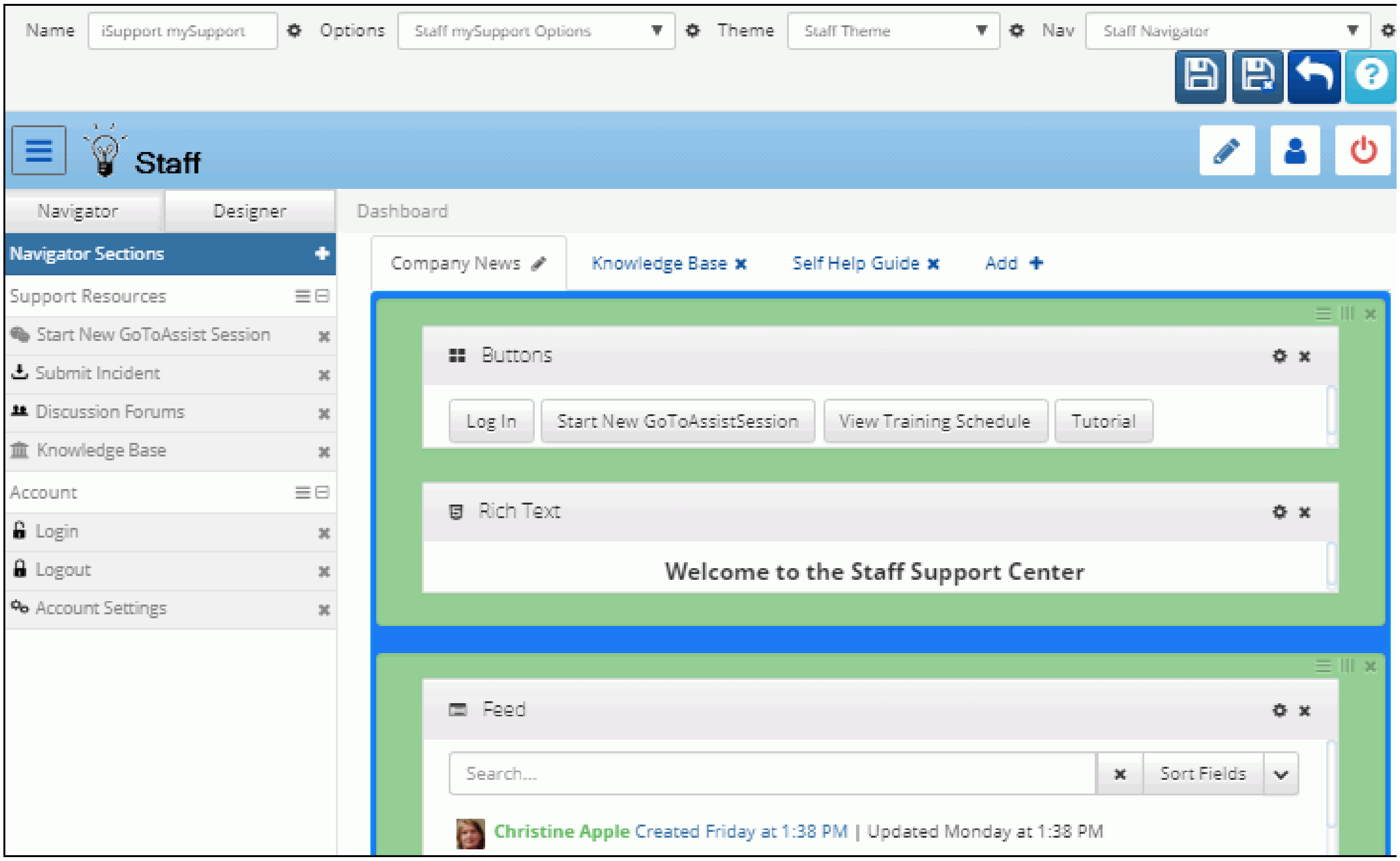
- Use the **Create** link to set up a new mySupport portal definition URL; use the **Copy** link to copy an existing mySupport portal with a unique URL. **Note:** Follow the steps on page 126 if you are creating a second/additional mySupport portal and it will use a different app URL name.
- Use the **Delete** link to delete a portal URL. Note that work items (incidents, changes, and purchase requests) submitted via a portal must be removed or archived in order for the portal to be deleted. To find these items, use the View Designer to create a view with the Source mySupport Portal | URL field in the applicable data source (Incidents, Changes, or Purchases). Note that this will not delete any associated options set, theme, or navigator; use the Manage Portal Items screen to delete those items. See “Managing Portal Items” on page 122 for more information.
- Use the **Reset mySupport Cache** link if you have one or more browsers open to view your mySupport Portal configuration setting changes, and suspect the settings are not appearing because the previous settings are cached on the web server. This link enables one or more browsers to display configuration changes immediately.
- Work item notifications sent to customers will include by default a URL referencing a mySupport portal. This URL is determined as follows: the URL to the portal from which a work item is submitted is primary; if submitted via any other source, using the order listed in the **Notification Link Order of Precedence** dialog, the system will check the Default for mySupport URL in Notifications field in the customer’s profile, customer’s primary company profile, and primary group profile. If a URL is specified in any of those fields, it will be used. If none exists in any of those fields, the mySupport portal definition with the Default for mySupport URL in Notifications checkbox selected will be used.

You can designate a mySupport portal as Public Knowledge Only; it will only include knowledge entries with an Approved External status.

Configuring the URL Name Settings, Option Set, Theme, and Navigator

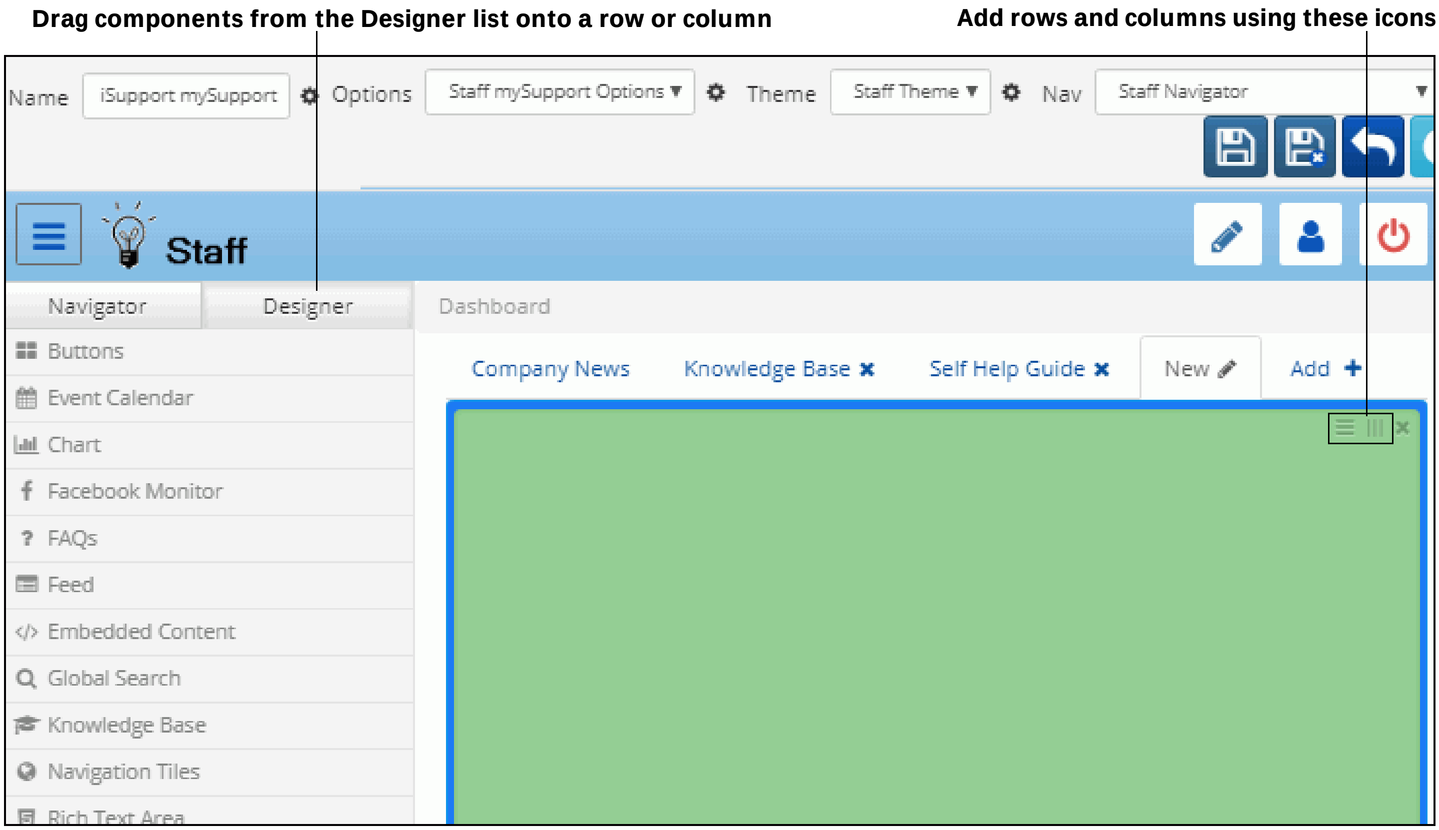
Use the Portal screen to create, copy, and configure the dashboards, navigator, theme, and option set for a portal. Use the ⚙ Configure options at the top of the screen to configure:

- A **Portal URL** - see "Configuring Portal URL Settings" on page 49.
- An **option set** - see "Configuring mySupport Options" on page 57.
- A **mySupport theme** - see "Creating and Modifying a mySupport Portal Theme" on page 119.
- A **mySupport navigator** - see "Configuring Navigator Links, Designer Components, and Buttons" on page 86.



Configure **dashboards** with added components via the Designer. Corporate dashboards are created by administrators in the Portal screen (see "Configuring Navigator Links, Designer Components, and Buttons" on page 86), and customer dashboards are created by customers on the portal if enabled in the Customer Options configuration screen; see "Configuring Customer Options" on page 66.

Each portal must contain at least one dashboard; to create one, click the Add+ tab and enter a name and description of the dashboard. You can use the Create From option on the dropdown menu to create a dashboard based on an existing dashboard. A row will appear for you to drag components from the Designer list on the left; you can add more rows and columns using the icons in the upper right corner of the row.



Features accessed via a navigator link will display full-screen, and feeds will always appear with a header. If you want customers to be able to save searches for a feed, you'll need to use a navigator link for the feed.

To add a left-side navigator link, add sections via the Add Section option, and the Options dialog will appear with the settings required for the feature. Use the Add menu option to add links, separators, and submenus on the Navigator tab.

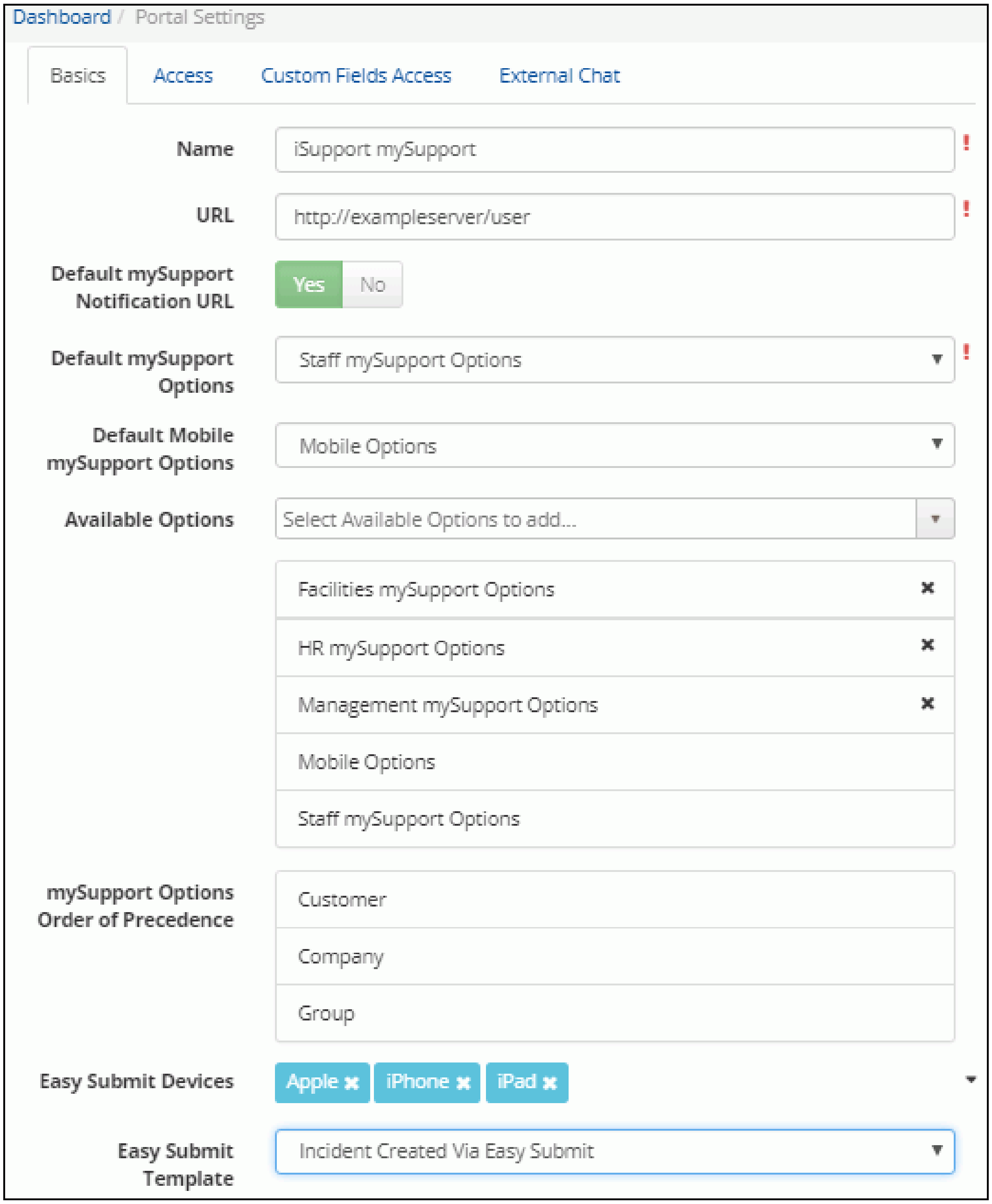
See the following for information on including features on a portal:

- For information on configuring components and buttons in a component, see "Buttons and Dashboard Designer Components" on page 88.
- For information on including links on a left side navigator (accessed by the option in the upper left corner of the screen) and icons in the Navigation Tiles component on a dashboard, see "Navigator Links" on page 86.
- For a list of all mySupport features and how to configure them, see "Configuring mySupport Features" on page 85.

Configuring Portal URL Settings

Use the Configure option next to the Name field in the Portal configuration screen to configure defaults, access, custom field settings, and more for a portal URL name.

Use the Basics tab to set up the URL, knowledge access, default options, and options order of precedence for a mySupport portal.



Name - Enter a name for the mySupport portal. This name will appear on the browser tab when the mySupport portal is accessed.

URL - Enter the URL for accessing the mySupport portal interface in the following format:

http://*<server>/<virtual directory for the mySupport portal interface>*

Note: If using Facebook integration, use the fully qualified domain name in the URL. Do not include a slash at the end of the URL.

Default mySupport Notification URL - Work item notifications sent to customers will include by default a URL referencing a mySupport portal. This URL is determined as follows: the URL to the portal from which a work item is submitted is primary; if submitted via any other source, using the order listed on the Notification Link Order of Precedence tab in the mySupport Portals screen, the system will check the Default for mySupport URL in Notifications field in the customer's profile, customer's primary company profile, and primary group profile. If a URL is specified in any of those fields, it will be used. If none exists in any of those fields, the mySupport portal definition with the Default for mySupport URL in Notifications checkbox selected will be used.

Public Knowledge Only - This field appears if the mySupport portal is not designated as the default for the mySupport portal URL in notifications. Select Yes to designate the mySupport portal as Public Knowledge Only; it will include only knowledge entries with an Approved External status. If this option is selected, no access settings will apply. The options selected in the Default mySupport Options field will be used, but only the theme and settings configured on the Knowledge Base subtabs will apply.

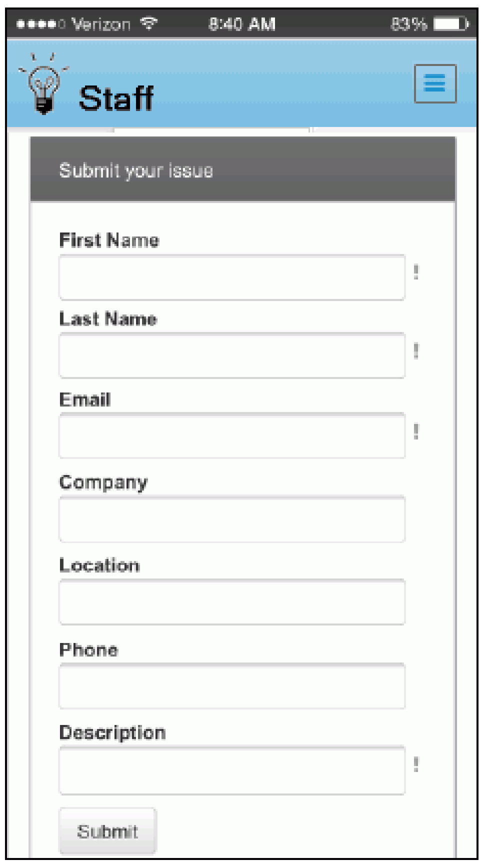
Default mySupport Options - Select the option set to appear when this mySupport portal URL is accessed if a customer has not logged in or if none are assigned to the customer's profile, customer's primary company profile, or primary group profile.

Default Mobile mySupport Options - Select the option set to appear when this mySupport portal URL is accessed by a smart phone (iOS, Android, or Blackberry) or tablet if a customer has not logged in or if none are assigned to the customer's profile, customer's primary company profile, or primary group profile.

Available Options - Select the option sets that can be mapped to the portal via the Customer Profile, Customer Group, and Company Profile screens. Once mapped to a customer, customer's primary company, or customer's primary group, the navigator, dashboards, theme, and other settings configured in the option set will appear when the customer logs in. If multiple option sets are mapped to a customer, the order of precedence is determined by the mySupport Options Order of Precedence field. If no option sets are assigned or if a customer does not log in, the one specified in the Default mySupport Options field will be used.

Easy Submit Devices - iSupport's Easy Submit functionality enables customers to use an older version of a device that cannot render HTML5 to submit incidents. Select the defined devices on which the Easy Submit interface should display.

The Easy Submit interface contains a Description field along with any fields required for authentication.



This functionality utilizes the device's user agent string, which identifies the browser version and other device details. Definitions in the Easy Submit Device Settings screen identify the user agent string for the device(s) to detect.

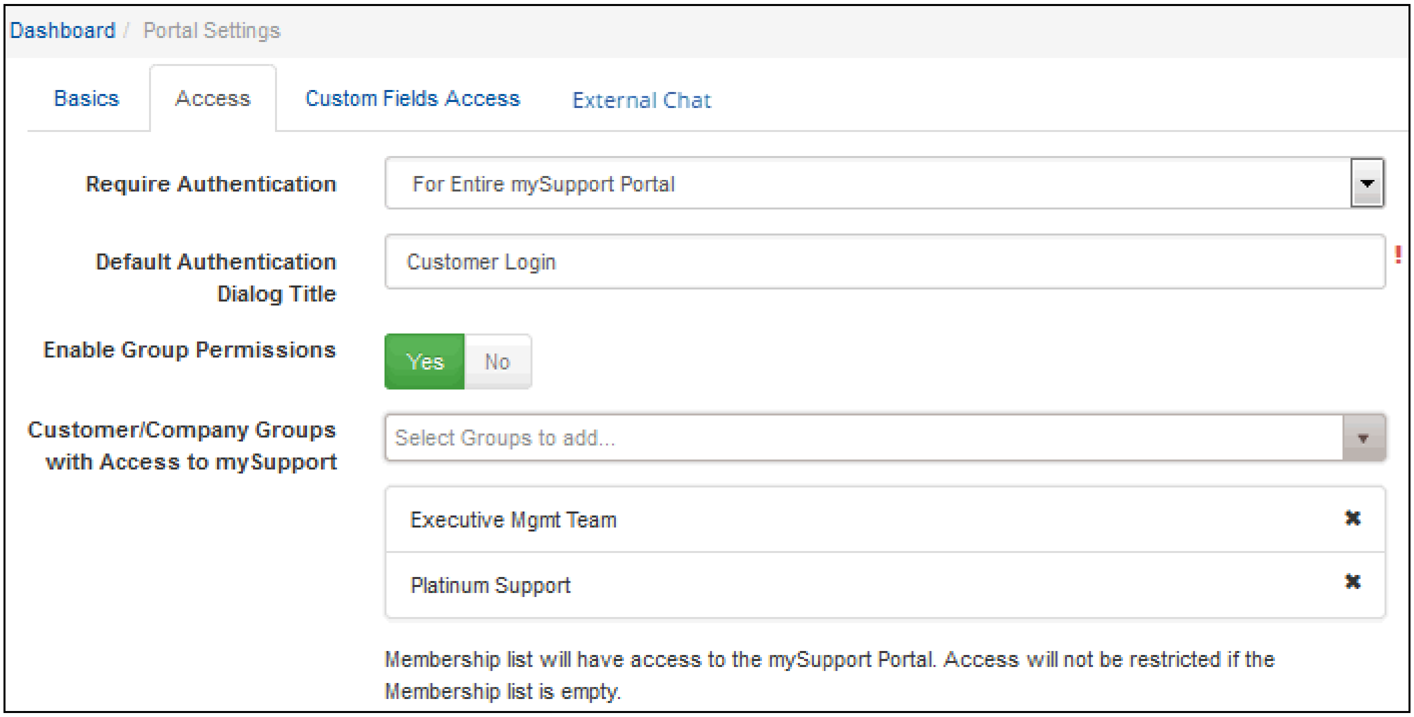
You can include an Easy Submit link on a mySupport navigator to display the Easy Submit interface.

Easy Submit Template - Select an incident template to apply to incidents created via the Easy Submit interface on a mobile device.

mySupport Options Order of Precedence - Options can be assigned to customers, companies, and customer groups; select the order in which these should be checked for the options to display when this mySupport portal URL is accessed. Any assigned options will be used; if none are assigned or if a customer does not log in, the Default mySupport Options will be used.

Configuring Portal Access

Use the Access tab to require authentication and enable group-based access for a mySupport portal. Note that this tab will not appear if the mySupport portal URL is designated as Public Knowledge Only.



Require Authentication - Select:

- None if you do not wish to require authentication on a mySupport portal.
- For Incident Submit and View Only to require logging in to access the Submit Incident and View Incident features.
- For Entire mySupport Portal to require logging in to access the mySupport interface.

If you do not require authentication, customers must enter a name and email address in order to submit or view incidents and changes. A Customer Profile record will be created after their first incident is submitted.

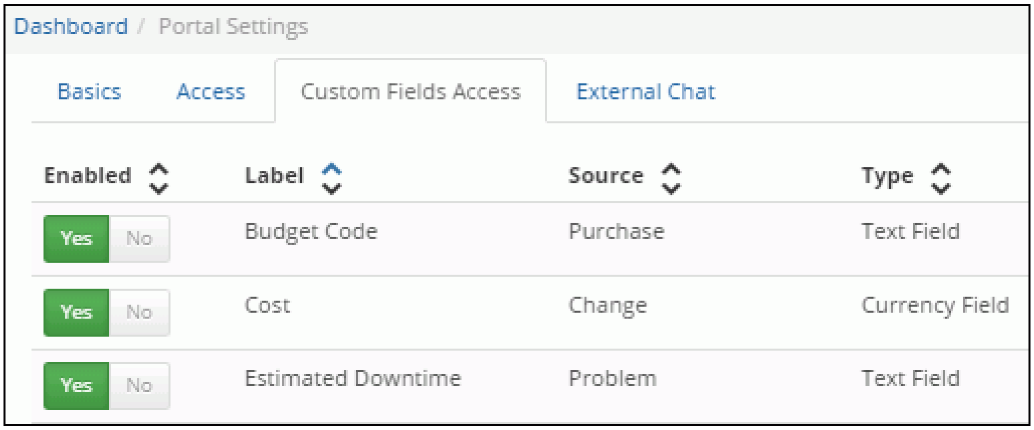
Default Authentication Dialog Title - Enter the title to appear at the top of the dialog that appears for the customer to log in.

Enable Group Permissions - This field appears if For Entire mySupport Portal is selected in the Require Authentication field. Select Yes to limit access to the mySupport portal by designating groups in the Membership list. If the Membership list is empty, access will not be restricted.

Customer/Company Groups with Access to mySupport - This section appears if Yes is selected in the Enable Group Permissions on mySupport Portal field; select the groups that should have access to the mySupport portal. Only the selected groups will have access to the mySupport portal.

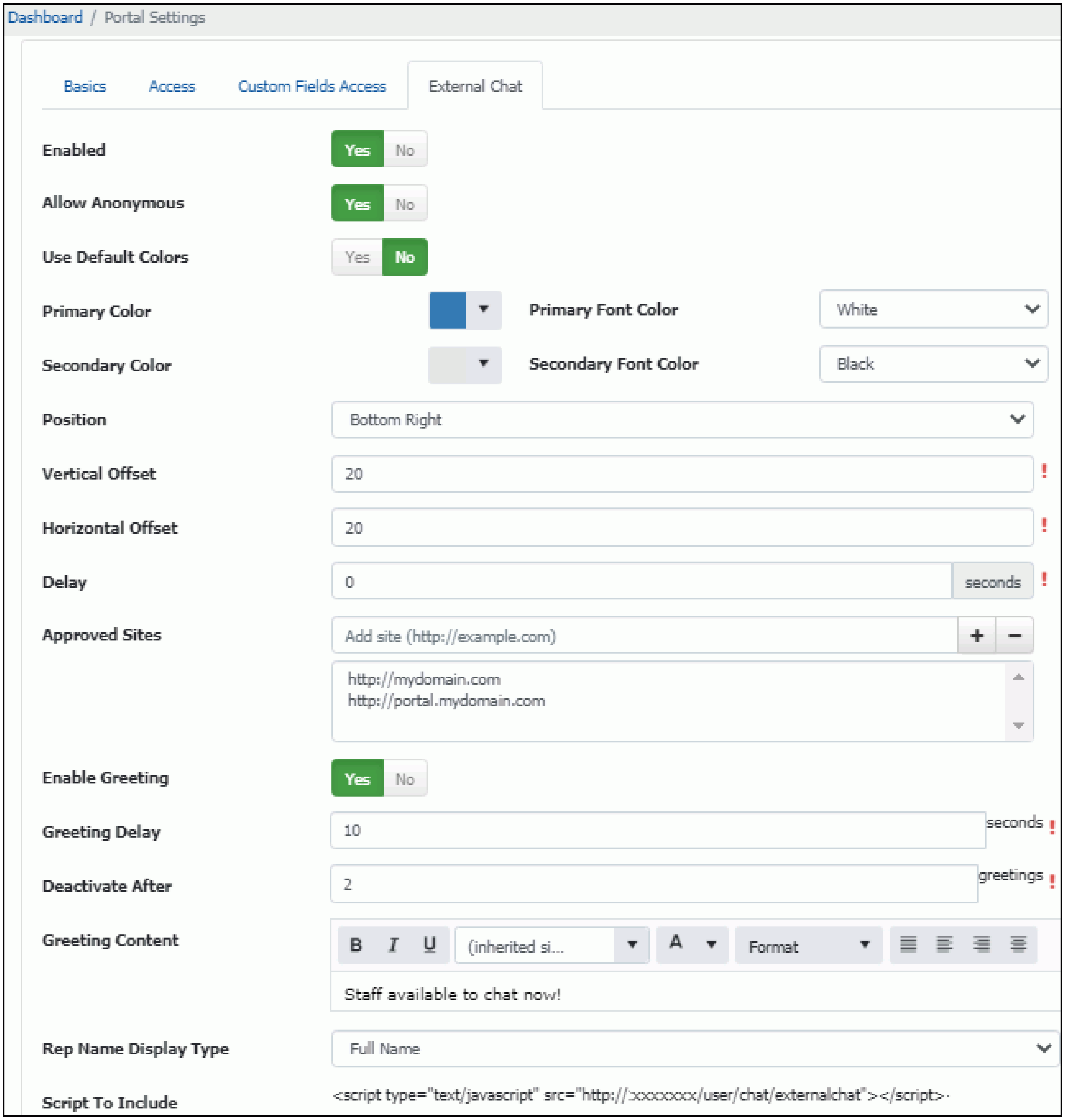
Restricting Display of Custom Fields

Use the **Custom Fields Access Tab** to restrict display of custom fields that can display for a portal URL.

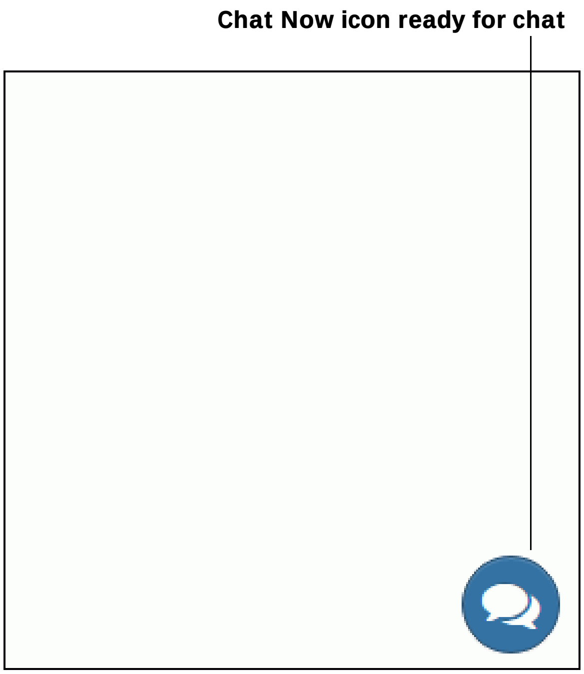


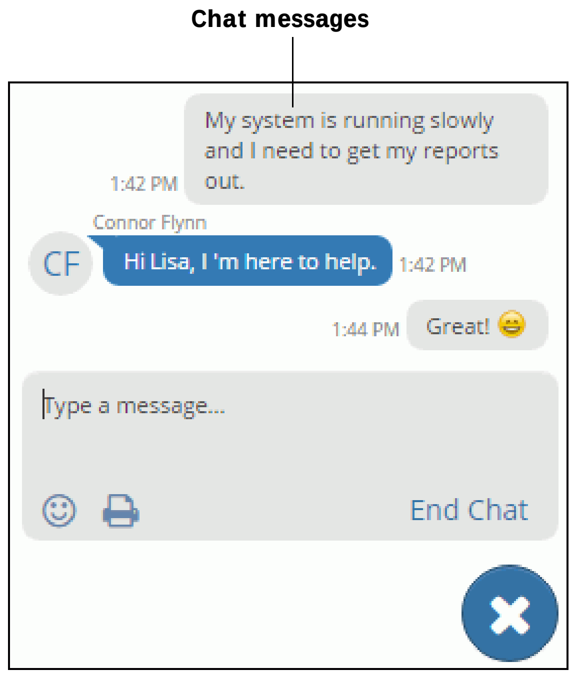
Configuring External Chat

Use the External Chat tab to configure the mySupport Chat feature to be hosted on other web sites. Note: To improve security, cross-frame scripting headers were added to the Rep, Mobile, and mySupport interfaces for new installs and upgrades. We recommend that you enable cross-frame scripting headers via the Application tab in the iSupport Configuration Utility after upgrading. If you do load the Rep, Mobile, or mySupport interfaces from within an iFrame or you use the External mySupport Chat feature, you will need to add the site URLs for the interface (or from which external mySupport chat has been integrated) into the Approved Sites list.



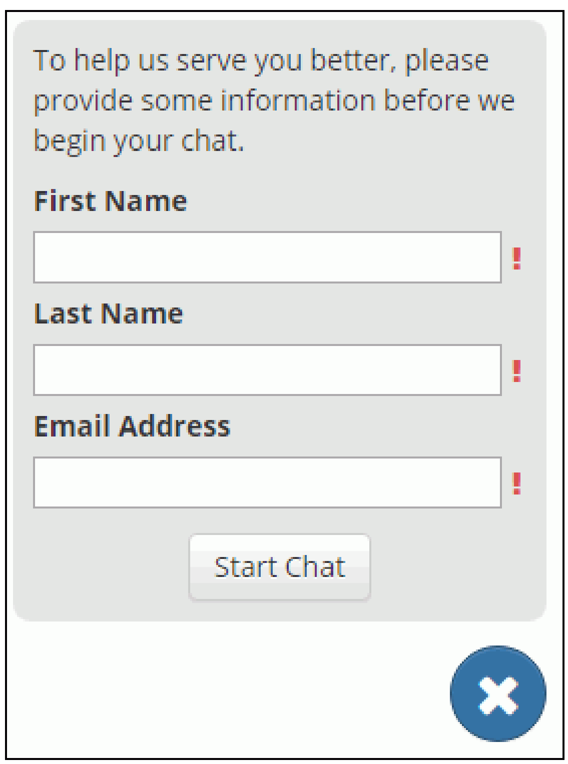
Enabled - Select Yes to enable and display fields for configuring the mySupport Chat feature for use on other web sites.





Allow Anonymous - Select:

- Yes to enable the user to enter a message immediately after selecting Chat, without requiring entry of their name and email address. A Customer Profile record will be created with a first name of External Chat and last name of Anonymous User, and the email address of ExternalChatAnonymousUser@example.com.
- No to require the user to enter their name and email address before entering a message.



Use Default Colors -- Select Yes to use iSupport's default colors of blue and gray as described below. Select No to display fields for selecting the primary and secondary color and font colors.

- The **Primary Color** field affects the support representative message background, the Chat Now and Close option backgrounds, and the Emoji, Print Chat Transcript, and End Chat link items in the "Type a message..." entry area. The default is blue.
- The **Secondary Color** field affects the "Type a message..." entry area background, user message background, system message backgrounds ("No support reps available", "Please wait for a support rep", and "Chat has Ended"). The default is light gray.
- The **Primary Font Color** field affects the greeting text, the Chat Now and Close options, and support rep message text.
- The **Secondary Font Color** field affects the "Type a message..." text, initials identifying the support representative, system message text ("No support reps available", "Please wait for a support rep", "The chat has ended", etc.)

Font color options are Default, Black, and White. The Default option determines black or white based on the shade of the background color; white will be used on a dark color and black will be used on a lighter color. The mySupport theme options color determines the Incident # and Print Chat Transcript link colors.

Position - Select the position on the page on which the Chat button should be anchored; you can display it on the top, middle, and bottom of the left or right sides, as well as the left, middle, and right sides of the bottom of the screen.

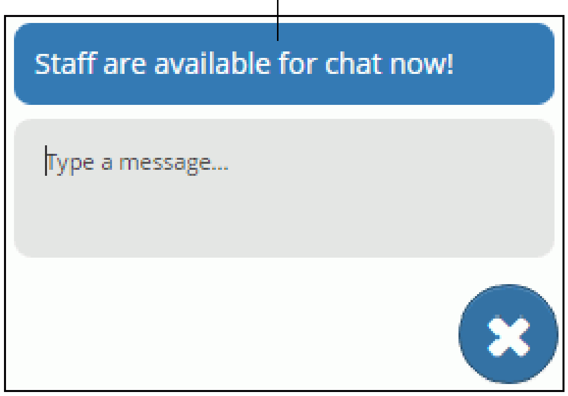
Vertical/Horizontal Offset - Enter the number of pixels away from the edge (relative to the selected position of the Chat Now button on the web site screen) in which to place the chat dialog.

Delay - Enter the number of seconds to lapse before the Chat Now option appears.

Approved Sites - Enter the sites that can use the script calling the External Chat feature. Note: To improve security, cross-frame scripting headers have been added to the Rep, Mobile, and mySupport interfaces for new installs and upgrades. We recommend that you enable cross-frame scripting headers via the Application tab in the iSupport Configuration Utility after upgrading. If you do load the Rep, Mobile, or mySupport interfaces from within an iFrame or you use the External mySupport Chat feature, you will need to add the site URLs for the interface (or from which external mySupport chat has been integrated) into the Approved Sites list.

Enable Greeting - Select Yes to, after the user clicks the Chat Now option, enable display of a configurable greeting prompt above the message area.

Greeting



Greeting Delay - Enter the number of seconds to lapse before the greeting prompt appears.

Deactivate Greeting After - Enter the number of times that the popup greeting should appear before the user enters the first message. Note that the greeting will not appear after a message is entered.

Greeting Content - Enter the text to appear in the greeting prompt.

Script To Include - Copy the contents of this field into the HTML of the page that will display the Chat dialog. We recommend that you add it as the last tag in the body in order to avoid slow load of the page.

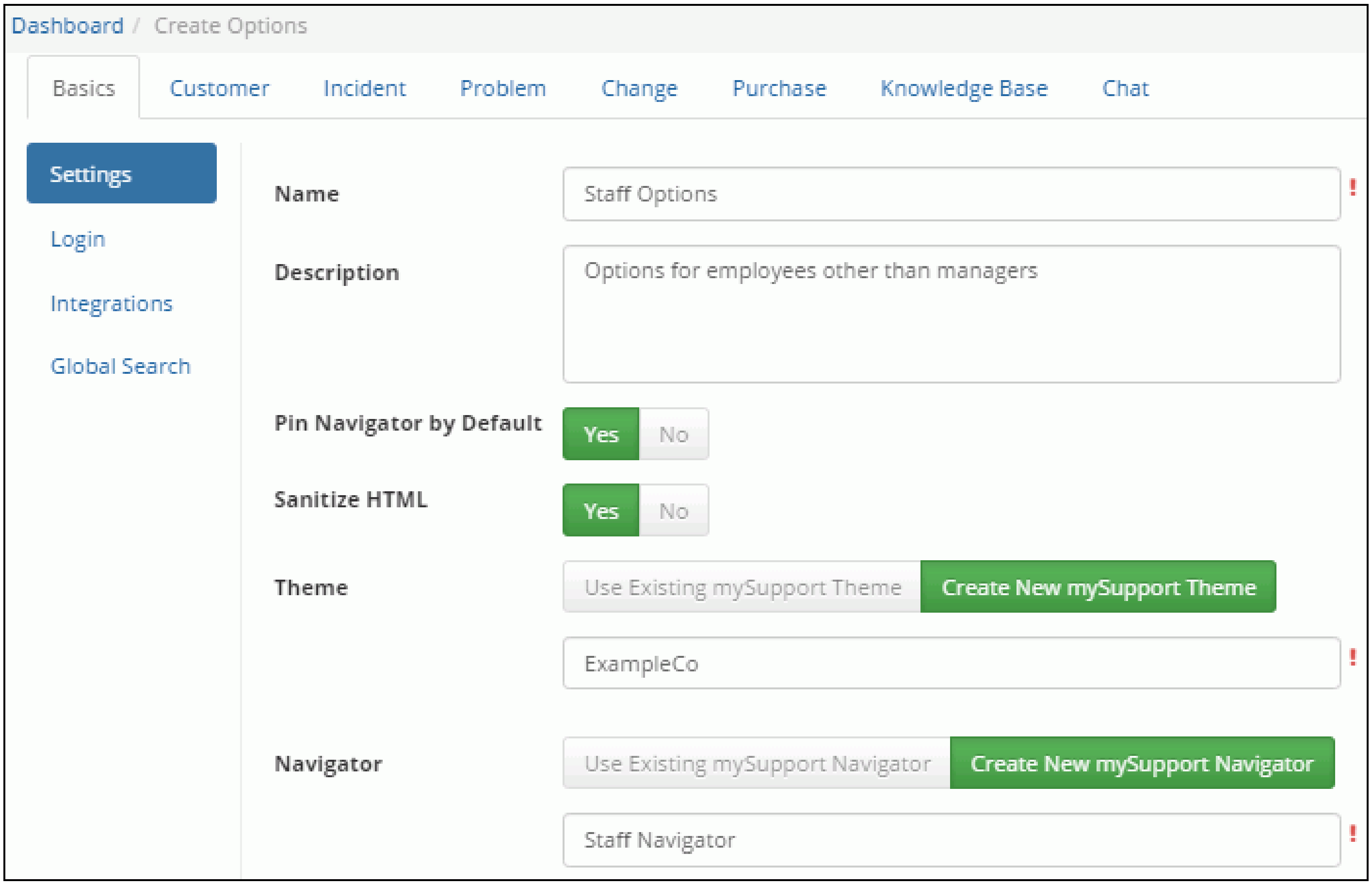
Rep Name Display Type - Select how to display the names of support representatives: by first name or by full name.

Configuring mySupport Options

Use the mySupport Options screen to configure the functional settings that apply to features accessed via navigator links and components. You'll be able to access the applicable settings when configuring dashboard components and navigator links.

Configuring Basics

Use the Basics tab to enter a name and description for the Options settings, specify the theme and navigator (if creating an option set), configure registration and forgotten password settings, and more.



When you first create an option set, the Theme and Navigator fields will appear for selecting the theme and navigator; select Configure next to the Theme and Navigator fields at the top of the Portal screen to modify the theme and navigator.

Configuring Basic Settings

Name - Enter a name for the Options settings. This name will appear for selection in the mySupport Portal configuration screen as well as in the Customer Profile, Company, and Group screens for mapping to customers, companies, and groups.

Description - Enter a description of the Options settings. This description will appear in the Options list view.

The following fields appear when you create a new option set; you can change the theme and navigator via the Configure option when editing an option set.

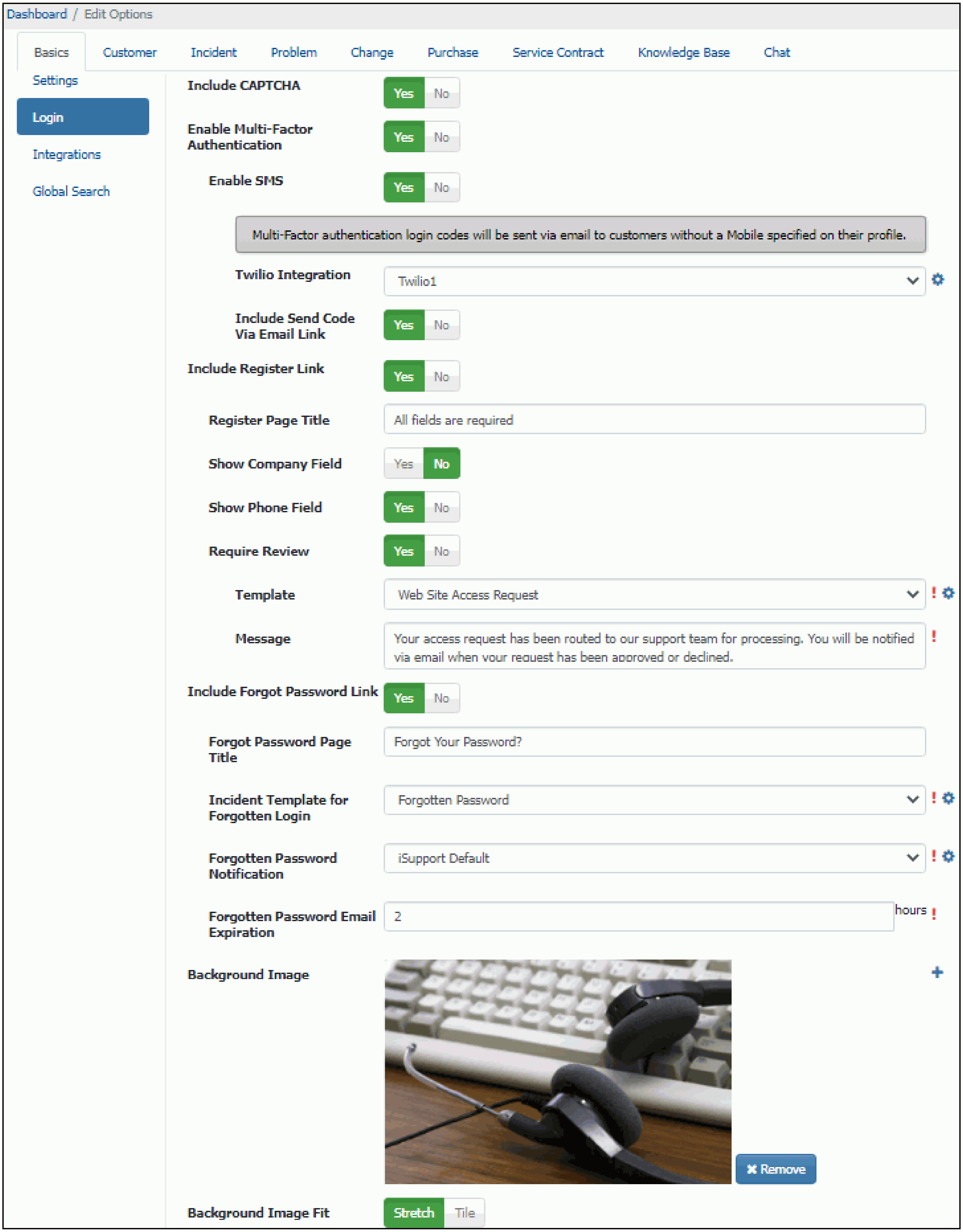
Pin Navigator by Default - Select Yes to display the left side navigator opened and pinned when a customer first accesses the portal.

Theme - This field appears if creating an option set. Select Create New mySupport Theme to create a new theme which includes the colors, fonts, and header image for the portal; select Use Existing mySupport Theme to select a preconfigured or default theme included in iSupport. See “Creating and Modifying a mySupport Portal Theme” on page 119 for information on configuring themes.

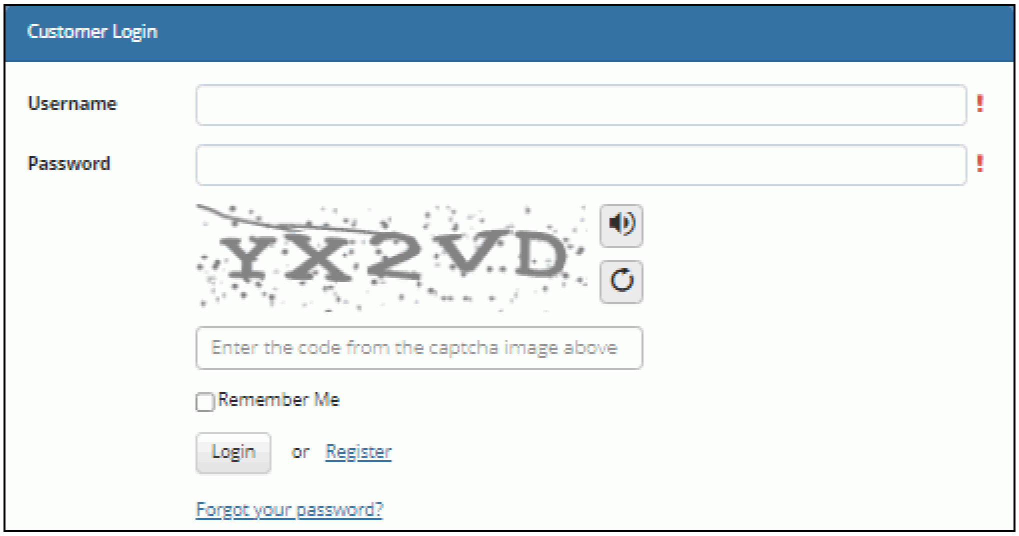
Navigator - This field appears if creating an option set. A mySupport navigator enables access to content; it can appear as a list of links on the left side of the mySupport portal accessed by the Menu, as a set of icons in a navigation tile component, or both. Select Create New mySupport Navigator to access the mySupport Theme screen and create a new theme; select Use Existing mySupport Theme to select a preconfigured or default theme included in iSupport. See “Configuring Navigator Links, Designer Components, and Buttons” on page 86 for information on configuring navigators.

__Configuring Login and Password Options__

Use the following fields to configure the Login, Register, and Forgot Password options.



Enable CAPTCHA - Select Yes to enable a CAPTCHA image with a code to be included on login-related dialogs as well as the Calendar RSVP Login and Calendar RSVP Register dialogs that appear on mySupport when authentication is not required and a customer is not logged in.



Enable Multi-Factor Authentication - Select Yes to enable an authentication code to be sent to a customer after login in order to access iSupport.

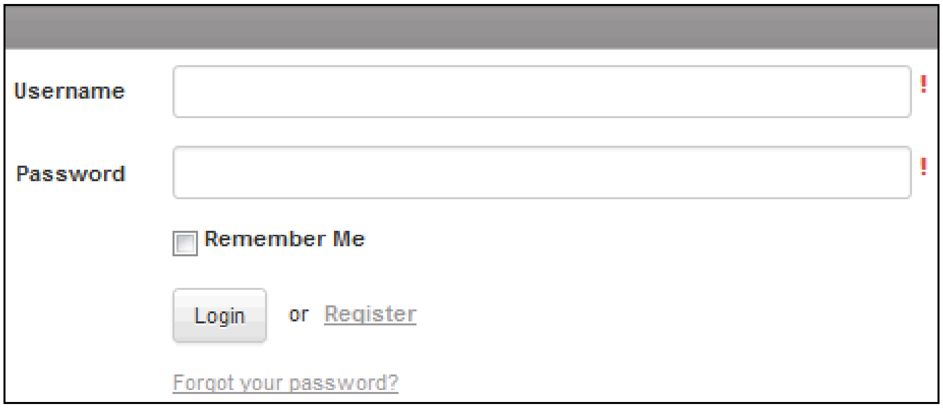
Enable SMS - Select Yes to send an authentication code via Short Message Service (commonly known as text messaging) to the customer. SMS carriers are defined in the Options and Tools | Integrate | SMS Carriers screen in configuration.

- If SMS **is** enabled:
  - If a Twilio account is specified and the customer has a specified phone number in their Customer Profile record, the code is sent to that number via SMS.
  - If the code has not been sent and the customer has a specified phone number and SMS Carrier in their Customer Profile record, the code will be sent to *<phone number>@<SMS carrier email>* via SMS.
  - If the code has not been sent and the customer has a specified SMS address (populated via mySupport Account Settings), the code will be sent to that address via SMS.
- If SMS **is not** enabled, the code is sent to the email address in the customer’s Profile record.

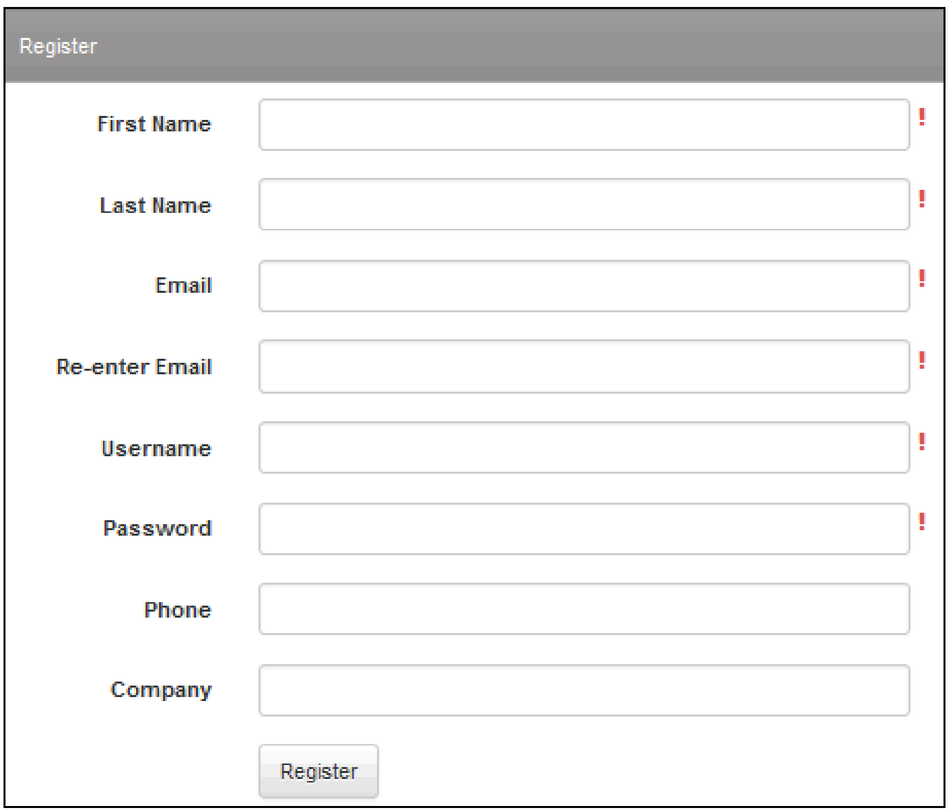
Twilio Integration - Select or create the Twilio integration to beused for sending authentication codes to customers via SMS.

Show Send Code Via Email Link - Select Yes to include a Send Code Via Email link on the Validate Authentication Code dialog when the code is sent via SMS. This allows the code to be sent to an email address if the customer doesn't have access to the phone that the code was sent to.

Include Register Link on Login - Select Yes to include a Register link on the Login dialog. This option enables the customer to enter their contact information and set up a login. A Customer Profile will be created if one does not already exist for the email address and login name; a customer will not be able to register with the same email address and login name as another customer.



Default Register Page Title - Enter the title to appear at the top of the page that appears for the customer to enter their contact information and set up a login.



Show Company Field - Select Yes to include the Company field in the Register dialog.

Show Phone Field - Select Yes to include the Phone field in the Register dialog.

Require Review - Select Yes to disable mySupport access in the customer's Profile record when it is created after a registration is submitted. You'll need to select a template to apply to the incident that is created for the registration request and configure a message to appear after the customer submits the registration. If No is selected in this field, access will be granted automatically.

Template - If registration review is enabled, select the template to apply to the incident that is created for the registration request. Select Configure to access the Incident Template screen for creating or editing a template.

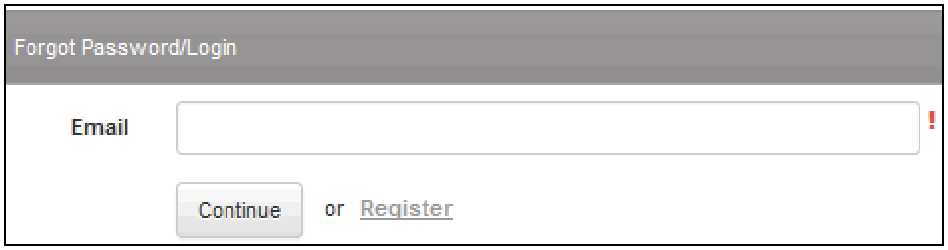
Message - If registration review is enabled, enter the text to display after a customer submits a registration.

Include Forgot Password Link on Login - Select Yes to enable a Forgot Password/Login link to appear in the Login dialog on the mySupport portal. This link will enable the customer to enter his/her email address and receive an email with the customer's login name and a link for resetting their password. When the customer sets the new password, it will be updated in the appropriate Customer Profile record.

If no customer profile is associated with the email address, an error will appear along with the Register link (if enabled).

If the email address is associated with more than one customer profile, a dialog will appear for the customer to enter his/her login name. After the customer enters a valid mySupport login name, the email will be sent for the customer to reset his/her password. The dialog also includes a Request a Login link. When clicked, the customer can enter his/her name and contact information, click Submit, and an incident will be created for the forgotten login request.

Forgot Password Page Title - Enter the name of the page that will appear for the customer to enter his/her email address for the password reset email.



Incident Template for Forgotten Login - Use this field to select a predefined template for the incident that will be created when the customer enters an email address associated with multiple customers, clicks the Request a Login link, completes name and contact information, and clicks Submit. Note: auto-close templates cannot be used for forgotten logins. Select Configure to access the Incident Template screen for creating or editing a template.

Forgotten Password Notification - Select a predefined notification to be sent to the customer with the customer's login name and a link for resetting their password, or select Configure to access the Custom Notification for creating or editing one.

Forgotten Password Email Expiration - Enter the number of hours in which the link (in the email sent to the customer) for resetting the password should be valid. The link will also expire when the customer resets the password.

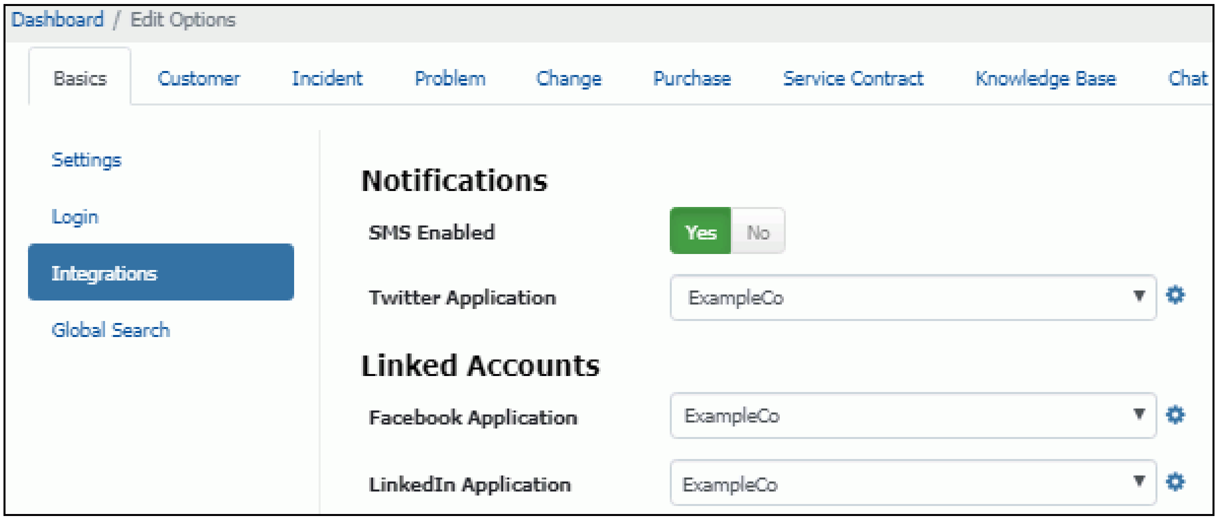
Background Image - Select the image to fill the screen around the login dialog.

Background Image Fit - Select Stretch to stretch the image and fit it in the window. (Note that this may cause some distortion.) Select Tile to display the image's fixed size in multiple tiles in the window. (That this option is best suited to small images.)

Configuring Integrations

Configuring Notifications and Linked Accounts

Customers can use the Notifications section in the mySupport Account Settings dialog to enable a notification to be sent via SMS and Twitter direct message whenever when a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests). iSupport utilizes a Twitter account and application for this feature as well as for publishing headlines and problems via Twitter. Customers will need to follow the Twitter account in order to receive these notifications. Use the Integrations option on the Basics tab in the mySupport Options screen to configure these notifications and linked accounts.



SMS Enabled - The Text Message Settings section under Notifications in the mySupport Account Settings dialog is enabled by default; select No to disable the Text Message Settings section. SMS carriers are configured in the Social Media Integration screen.

Twitter Application - Select the Twitter application entered in the Social Media Integration screen to use for the Twitter Monitor component and Twitter notifications. Select  Configure to access the Twitter Applications tab in the Social Media Integration screen.

Customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via Facebook or LinkedIn; for example, if the customer is logged into Facebook, the customer will not need to enter an iSupport login. iSupport utilizes Facebook and LinkedIn applications for this feature.

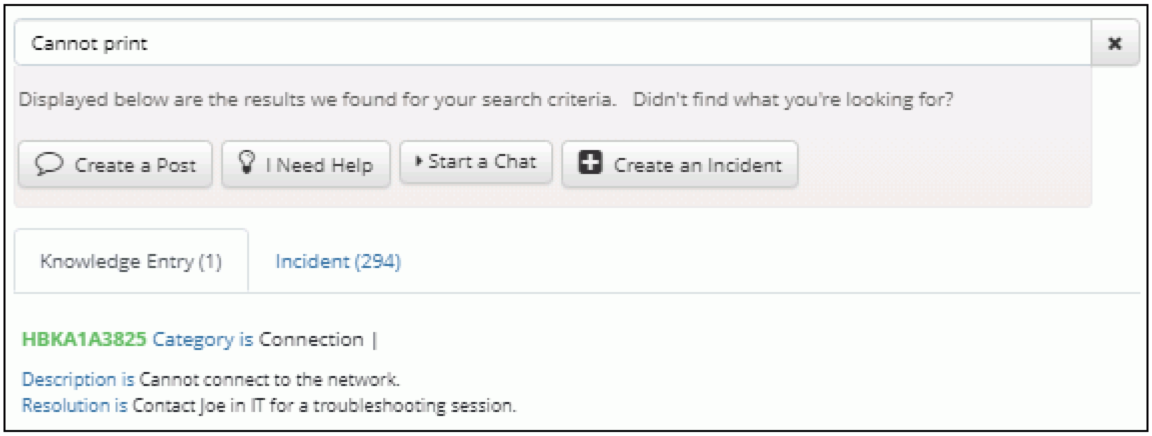
Facebook Application - To enable customers to link their Facebook account in the mySupport Account Settings dialog for authenticating automatically, select the Facebook application entered in the Social Media Integration screen.

LinkedIn Application - To enable customers to link their LinkedIn account in the mySupport Account Settings dialog for authenticating automatically, select the Linkedin application entered in the Social Media Integration screen.

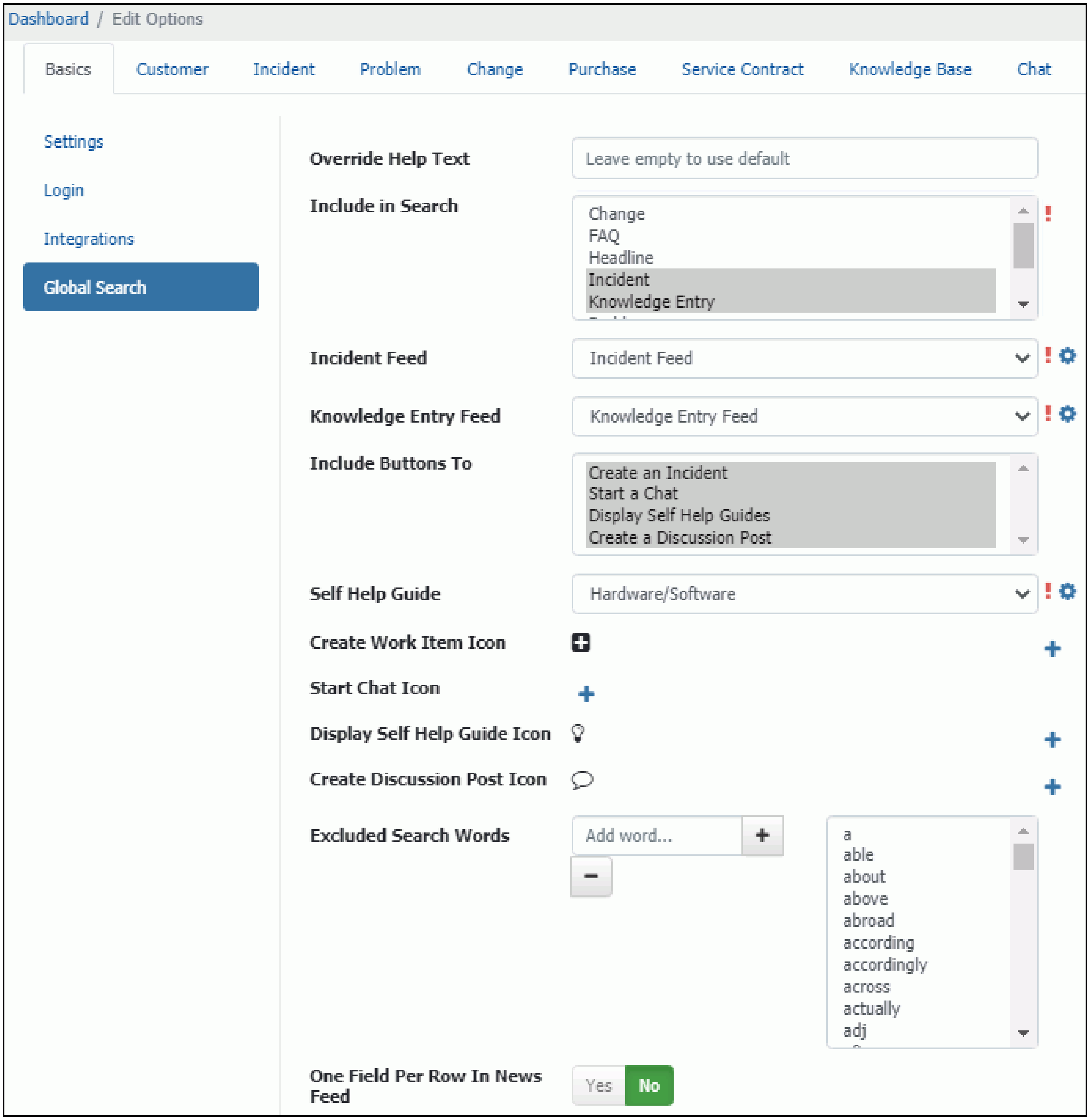
Configuring Global Search Options

Global Search can be included alone in a component or above the global news feed. It enables a user to enter a problem description, search text, question, or post; and search work items, knowledge entries, and discussion posts for that text. While the text is entered a keyword search will be performed; all searches will be based on all fields configured for work item display. A list of words excluded in the search can be configured; this list will be utilized after two words are entered. If a phrase is entered in quotes, the text within the quotes will be used in the search.

Results will appear below the search bar; if configured, links will appear for creating an incident, displaying a self help guide (the link will appear by default as "I Need Help"), starting a chat, and/or creating a discussion post.



Use the following fields to configure Global Search:



Override Help Text - Enter the text to appear in the search bar (instead of the default text). This text will override any text configured via the Resource Editor; see "Using the Resource Editor to Customize a mySupport Portal" on page 123 for more information.

Include in Search - Select the features to include in the search conducted after text is entered in the search bar: Change, Incident, Knowledge Entry, Problem, Purchase, or Discussion Post.

<work item type> Feed - Select the feed containing the layout and sort options for entries that appear when results are found after a search. Select Configure to create a new feed or edit the current feed; see "Feeds" on page 89.

Include Buttons To - Select the buttons to appear after an entry in the search bar:

- **Create an Incident** - displays the Incident Submit screen. Use the **Create Work Item Icon** field to select the icon to precede the Create *<a/an> <work item type>* button that will appear after an entry in the search field.

- **Start Chat** - opens a chat dialog with the contents of the search. Use the **Start Chat Icon** field to select the icon to precede the Start Chat button that may appear after an entry in the search field. See "Chat" on page 34 for more information.
- **Display Self Help Guides** - displays a self help guide; the **Self Help Guide** field appears for selecting one. See "Self Help Guide" on page 111 for more information. Use the **Self Help Guide Icon** field to select the icon to precede the I Need Help button that may appear after an entry in the search field.
- **Create a Discussion Post** - displays a dialog for entering a post to any of the shared discussion-only feeds (those that do not restrict customer access) created by support representatives. Use the **Create Discussion Post Icon** field to select the icon to precede the Create a Discussion Post button that may appear after an entry in the search field.

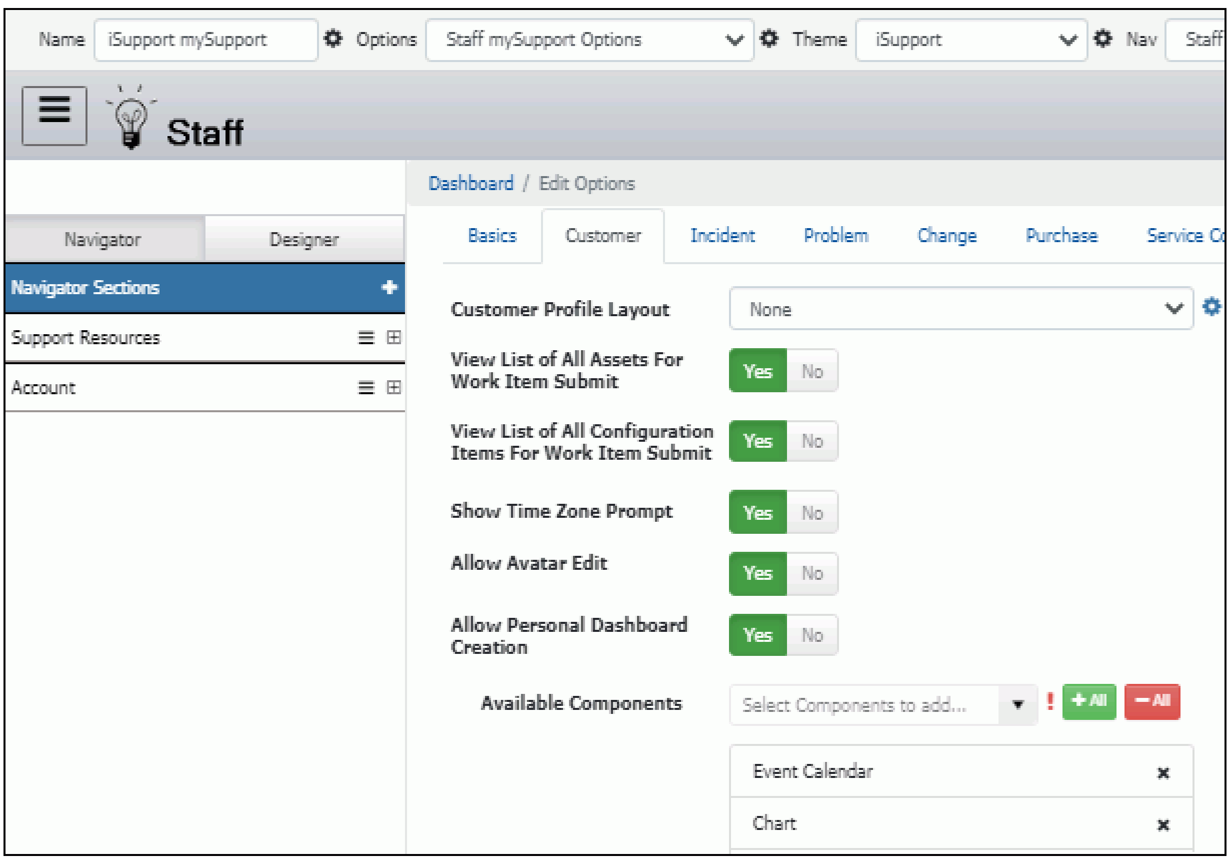
Excluded Search Words - Enter the words to be excluded when a search is performed.

One Field Per Row In News Feeds - Select Yes to display fields on news feed entries individually per row.

Configuring Customer and Work Item Options

Configuring Customer Options

Use the Customer tab in the Options screen to select a layout to appear when a customer clicks the View Complete Profile button in Account Settings, and to enable customers to add dashboards and components to a mySupport portal and specify the components that can be added. Note that currently the only way to view a customer dashboard is to use the customer's login on the portal; only corporate dashboards (created via the mySupport Portals screen) are available for copying and adding to a portal.

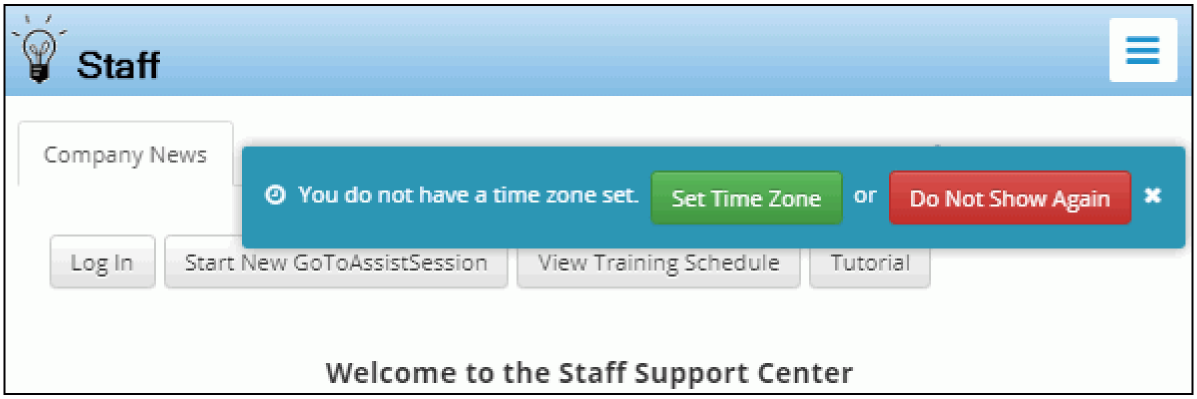


Customer Profile Layout - Select a predefined mySupport Customer Profile layout to appear when the customer clicks the View Complete Profile button in the mySupport Account Settings screen. You can also select Configure to configure a layout. If you select None in this field, the View Complete Profile button will not appear.

View All Assets For Work Item Submit - Select Yes to enable customers to display a list of all assets for selection. Customers will not be able to access the full Asset records.

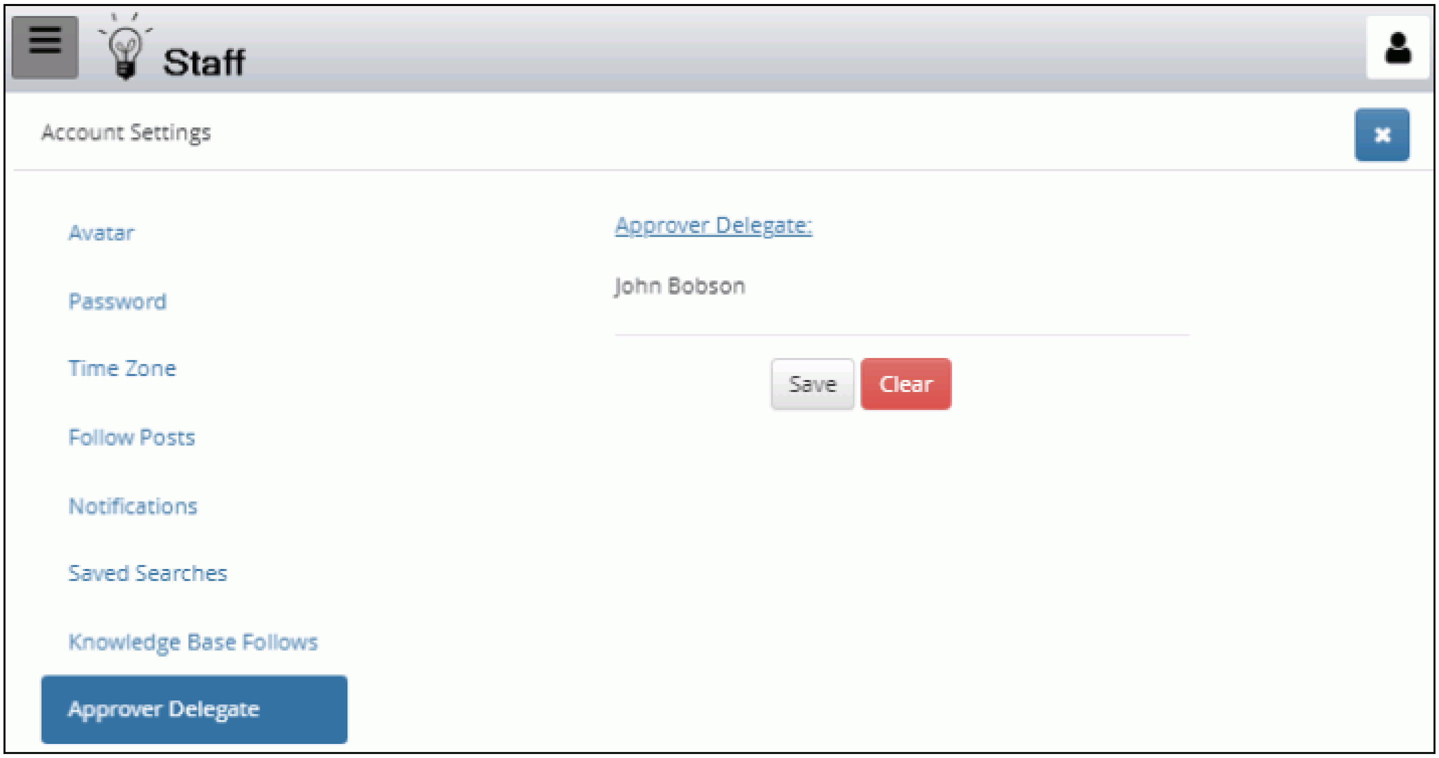
View All Configuration Items For Work Item Submit - Select to enable customers to display a list of all configuration items for selection. Customers will not be able to access the full Configuration Item records.

Show Time Zone Prompt - Event calendars and work item histories, and other time-based items display in the server's time zone by default; select Yes to display the following prompt reminding customers to set their time zone. If the customer selects Set Time Zone, the Time Zone section in Account Settings will appear.

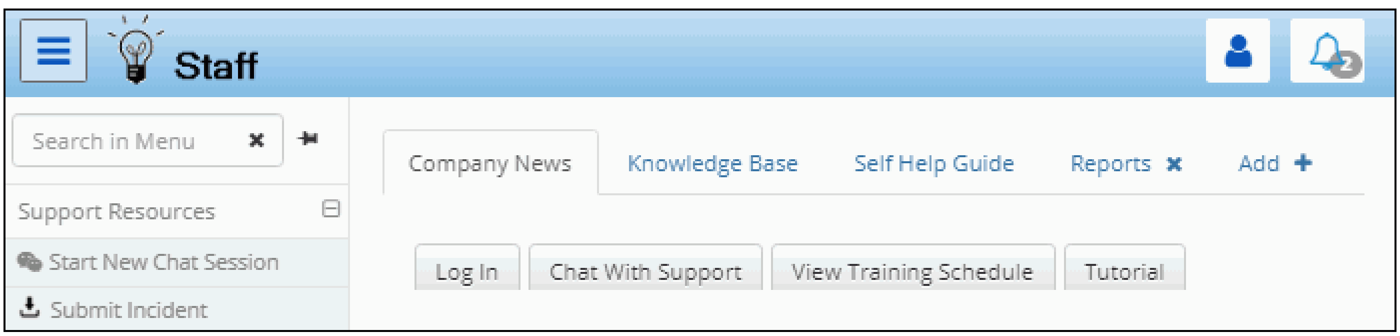


Allow Avatar Edit - Select Yes to enable an Avatar tab to appear for the customer to upload an avatar image. This enables a customer to set an avatar that will appear on the mySupport header, in discussion posts, and on the Approvals tab in the Incident, Change, and Purchase Request screens (if the customer is an approver in an approval cycle or a customer on an incident or change). The avatar will be updated in the customer's Profile record.

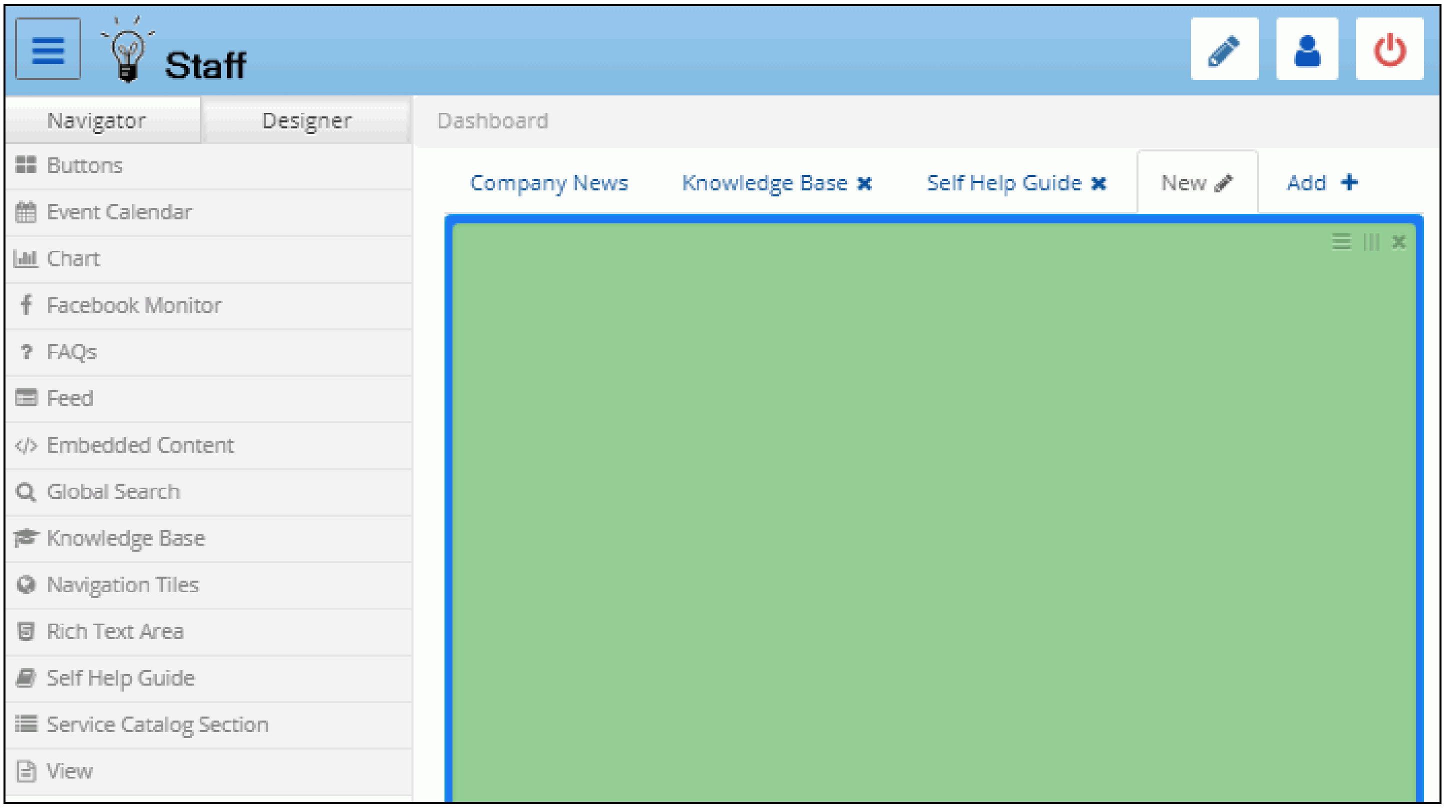
Allow Approver Delegate Edit - Select Yes to Select Yes to display the Approver Delegate tab in the Account Settings screen to enable the customer to designate another customer who can specify a verdict on work items pending approval for them. Note that an approver delegate can also be specified for a customer in the Customer Profile screen.



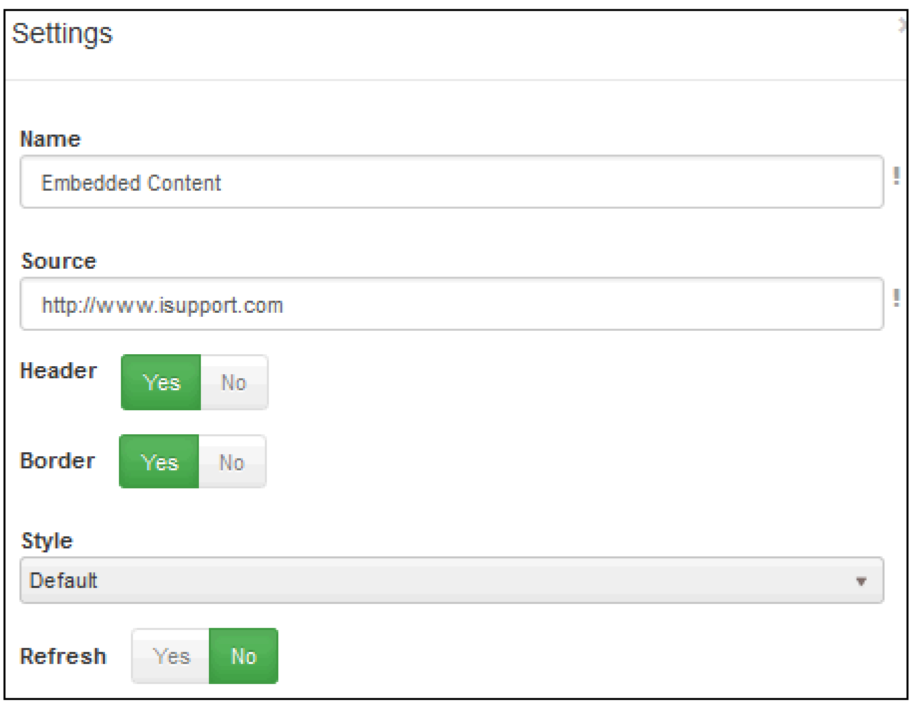
Allow Personal Dashboard Creation/Available Components - Select Yes to display the Add + button on the portal for a customer to add dashboards, and then select the components to display for the customer to add to dashboards.



If customers can add dashboards, an Add+ dashboard tab will appear after a customer logs in.

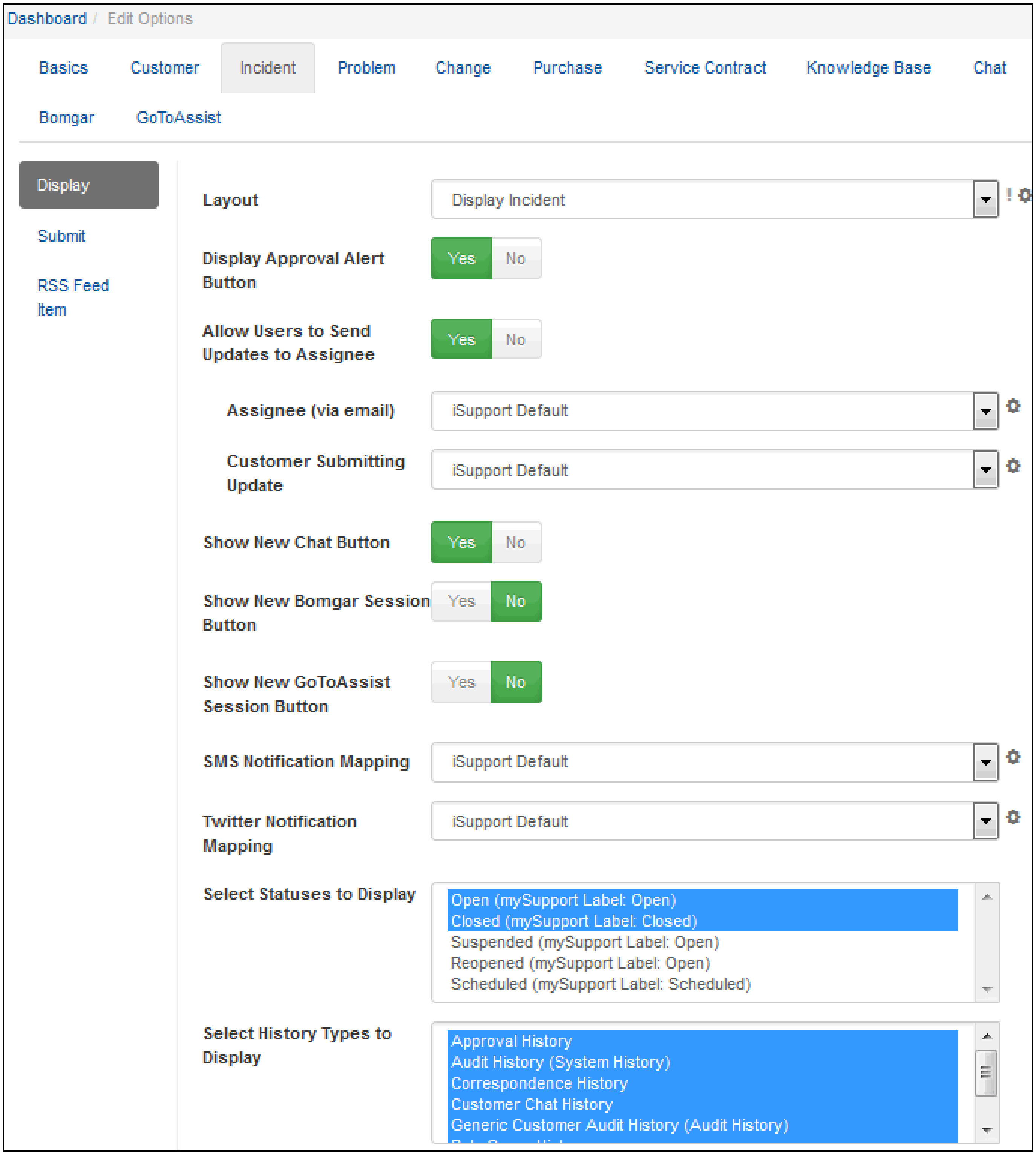


When a customer clicks the Add + link, a dialog will appear for adding a name and then the newly-created dashboard will appear along with a list of the components selected in the Available Components field on the Customer tab in Options. When the customer drags a component from the Designer menu to the newly created dashboard, the Settings dialog will appear to configure the feature and appearance for the component.



Display Settings

Select Display in Options to specify the layout of work item display screens and configure approval alerts, update notifications, and the status labels and history types to include.

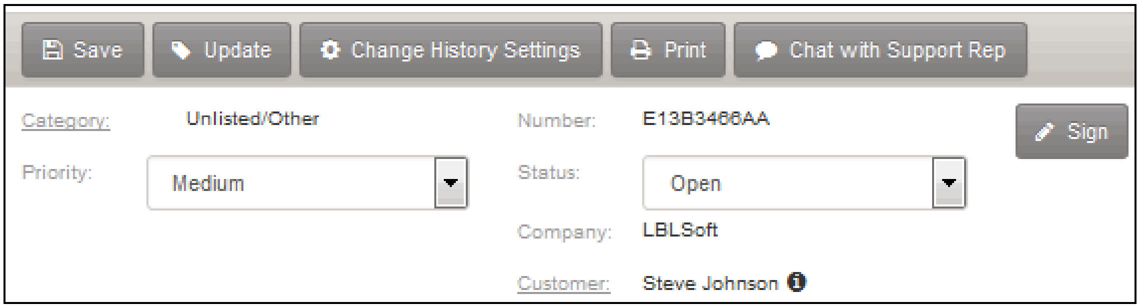


Layout - Select the layout containing the fields and tabs that will appear when customers display a work item of the applicable type or select Configure to access the applicable layout screen. Note: If including the Related Items field in a work item display layout, the link that displays to the user will only display the types of items for which you have a feed navigator link included on the portal.

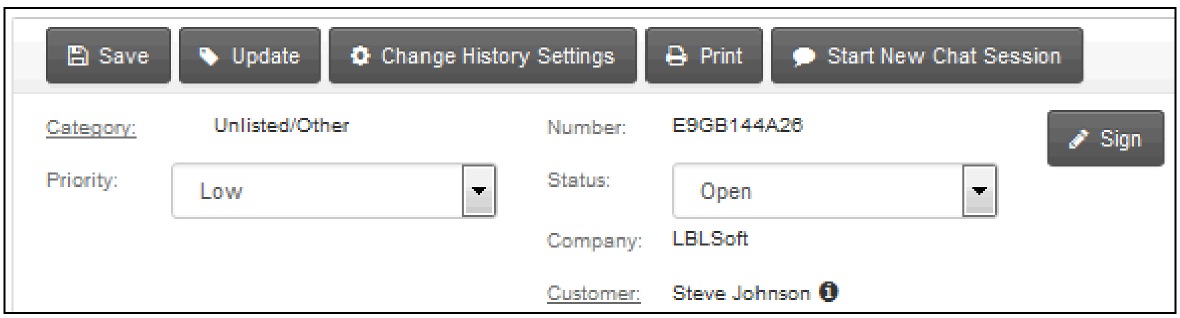
Display Approval Alert Button (incident, change, and purchase only) - Select Yes to display the approval alert bar if approvals are required. Note: if you select No in this field a customer may not be able to approve or cancel an approval process.

Allow Users to Send Updates to Assignee (incident and change only) - Select Yes to include an Update link. This enables customers to enter text that will be included in the work history.

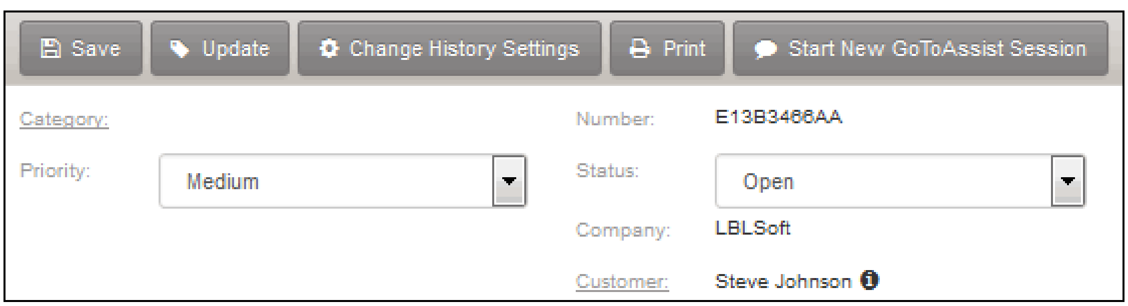
Show New Chat Button - Select Yes to include a Chat with Support Rep button on the Incident Display screen on the mySupport portal. Note that this feature requires that the Awareness/Awareness Chat function is enabled via the Feature Basics screen.



Show New Bomgar Session Button (incident only) - This field appears if Bomgar Integration is enabled; select Yes to include a Start New Chat Session button on the Incident Display screen on the mySupport portal. Bomgar integration is configured via the Options and Tools | Integration | Bomgar Integration.



Show New GoToAssist Session Button (incident only) - This field appears if you have Citrix GoToAssist functionality enabled in the Core Settings | Feature Basics screen. Select Yes to display a Start New GoToAssist Session button in the Incident Display screen on the mySupport portal. If you haven't entered the GoToAssist Customer Support Portal URL on the GoToAssist tab, a prompt will display for you to enter it.



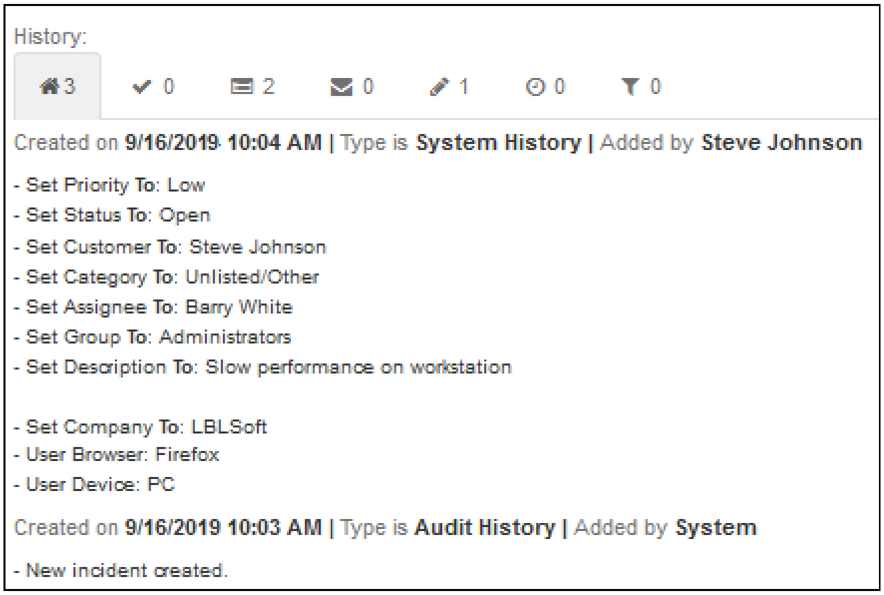
SMS/Twitter Notification Mapping (incident, change, purchase, and service contract only) - This field appears if a Twitter application is configured in the Social Media Integration configuration screen. Customers can use the Notifications section in Account Settings to enable a notification to be sent via SMS and/or Twitter direct message whenever when a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests). Customers can enable or disable notifications for a work item after saving, and change notification settings for an existing work item via the Notification button in the work item toolbar.

Select the notifications to be sent to the assignee (via email) and customer submitting the update. You can select Configure to create a custom notification via the Custom Notifications configuration screen, select the default notification, or select a predefined custom notification. Note that any HTML formatting entered in the Custom Notification screen for these notifications will be stripped. The notifications are sent upon work item save or on the schedule of the Notifications agent.

If you wish for a specific customer, company, or group to receive customized notification text, ensure that the custom notification is selected in the Notification Mapping in the Options associated with the customer, company, or group.

Select Statuses to Display - Select the status levels to appear; hold down the Ctrl key to select multiple entries. Custom status labels are defined via the Custom Status Labels configuration screen.

Select History Types to Display - Select one or more types of history entries to be available for display on a record in the Global News Feed and individual work item display screen. Hold down the Ctrl key to select multiple entries. (Note: different types of work items use different types of history.) History entries for individual work items will appear as in the following example:

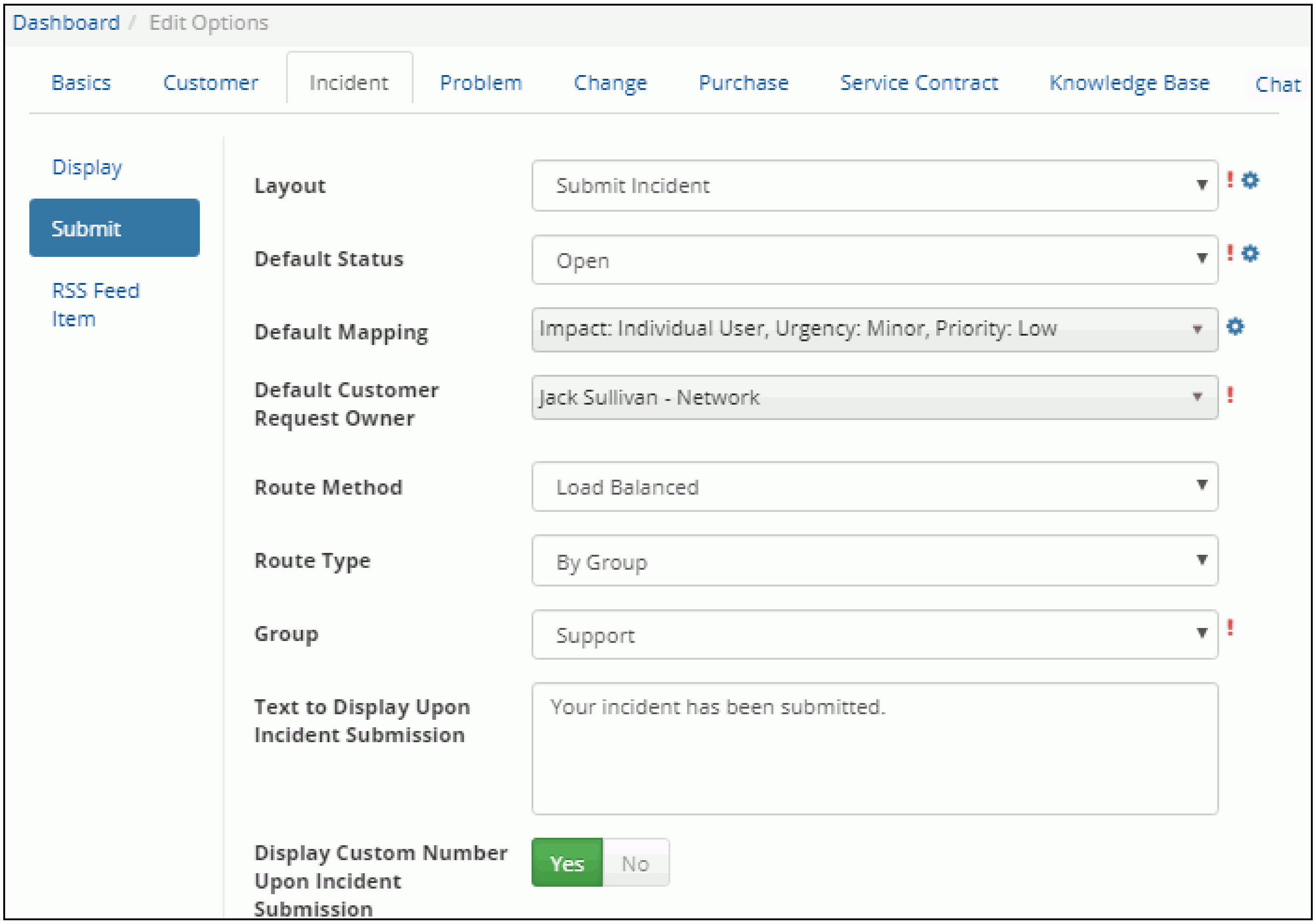


Customers can use the Change History Settings button to select the types of history to display.

- **Approval** - a notation of every approval action performed on the work item; for example, "Approval Initiated".
- **Audit History** - a notation of every action performed on the work item; for example, "New Incident Created", "Status Changed From: Open To: Closed", as well as the basic work item event entries "Incident Created", Incident Routed", "Incident Closed", and "Incident Reopened". Note that this will appear as "System History" on the mySupport portal.
- **Correspondence** - entries for sent and received correspondence, including the subject line and body of the correspondence. This includes work items (incidents or changes) created via email processing and updates submitted via email with the work item number in the subject line.
- **Generic Customer Audit History** (displays as Audit History on the portal) - a notation of comments entered via the Customer Work History dialog in the work item screen. The Customer History dialog enables a support representative to, if configured, edit the work history text that will display to the customer. The edited work history will display in a field labeled "Work History" when a work item is viewed via the mySupport portal.
- **Rule Group History**- a notation of every action performed by a rule group; for example, "Met Initial Save Rule".
- **SLA History** - a notation of every action performed by an SLA (for versions prior to 10.5).
- **Customer Chat History** - displays information on a customer chat that created the incident, as well as chats initiated via the chat feature for the current incident.

Settings for Incident, Change, and Purchase Request Submission

Use the Submit settings to specify the layout of work item submit screens and defaults for work items submitted by customers from a mySupport portal and configure defaults for the status, priority, assignee, load balanced route method, and text to appear after submission.



Layout - Select the layout containing the fields and tabs that will appear when customers submit a work item of the applicable type via the mySupport portal or select Configure to access the applicable layout screen. Note that you can enable the Category Select dialog to display when the Incident or Change Submit screen initially appears on a mySupport portal.

Default Status - If the Status field is included for the Submit screen, select the status to populate that field by default; if the Status field is not included, select the status to assign by default. Select Configure to access the Custom Status Label screen.

Default Mapping - This field appears if impact and urgency mapping is enabled; click this link to select the Impact, Urgency, and Priority to display by default in the Impact, Urgency, and Priority fields in the Incident screen. Select Configure to access the Impact and Urgency Mapping screen.

Default Priority - This field appears if impact and urgency mapping is not enabled; select the priority (Low, Medium, High, or Emergency) to assign to newly-created work items.

Default Customer Request Owner - Select the support representative to assign to incidents submitted by customers from the mySupport portal. If a load balanced routing method is specified as well, incidents will be assigned to this support representative if none are available.

Routing Method - Select the method by which work items are assigned: none, load balanced, or round robin. Select None to only assign mySupport-submitted work items to the support representative specified in the Default Customer Request Owner field. If there is no support representative available, the work item will be assigned to the support representative specified in Default Customer Request Owner field. If routing by group or location, select:

Group - If routing by group, select the support representative group for assignment.

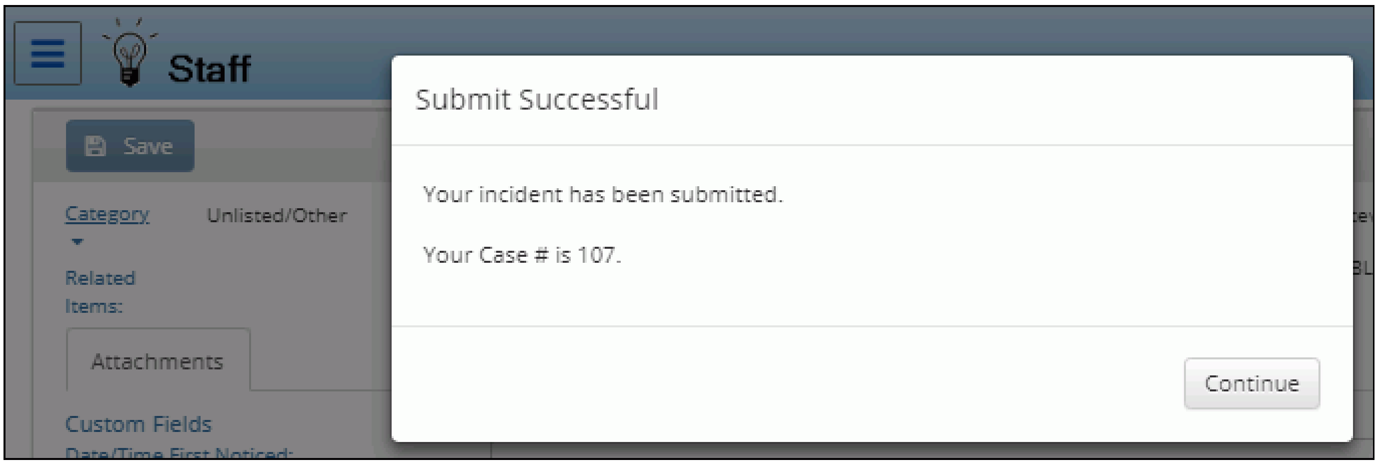
Default Location - If routing by location or location by skill, select the location for assignment.

Allow Location Override - If routing by location or location by skill, select Yes to display a Route to This Location field in the Incident Submission screen on the mySupport portal. The location selected in this field by the customer will take precedence for routing assignment.

Select Locations to Display - If routing by location or location by skill, select the locations to be included in the Route to This Location dropdown list on the Incident Submission screen on the mySupport portal.

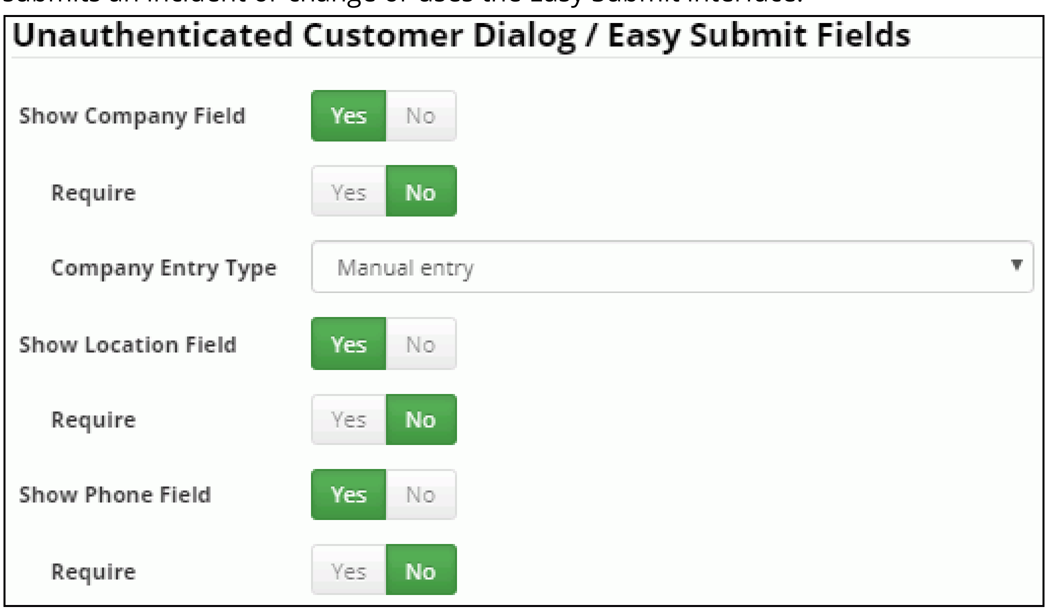
Text to Display Upon <*work item type*> Submission - Enter the message to display after a customer submits a work item from the mySupport portal. For example, if "Your incident has been submitted." is entered in this field, that text would appear as shown in the example below.

Display Custom Number Upon <*work item type*> Submission - Select Yes to display the configured custom number label and number instead of iSupport's ten-digit alphanumeric number in the dialog that appears when a customer submits a work item via a mySupport portal. For example, if the custom number label is "Case #", that label and the configured number would appear as in the example below.

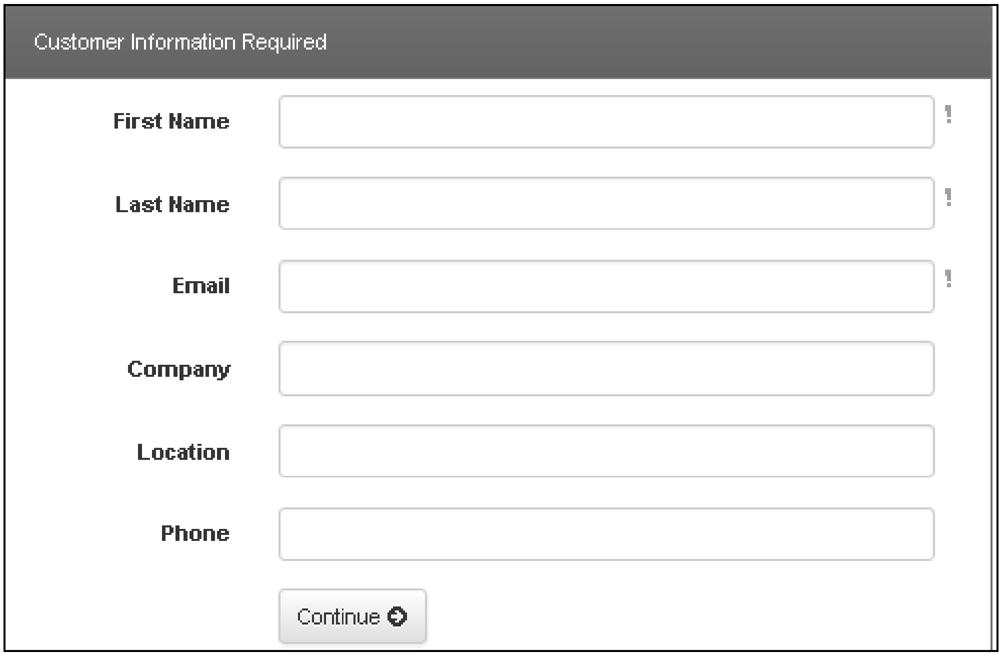


Unauthenticated Customer Fields (Incident and Change only)/Easy Submit Fields (Incident Only)

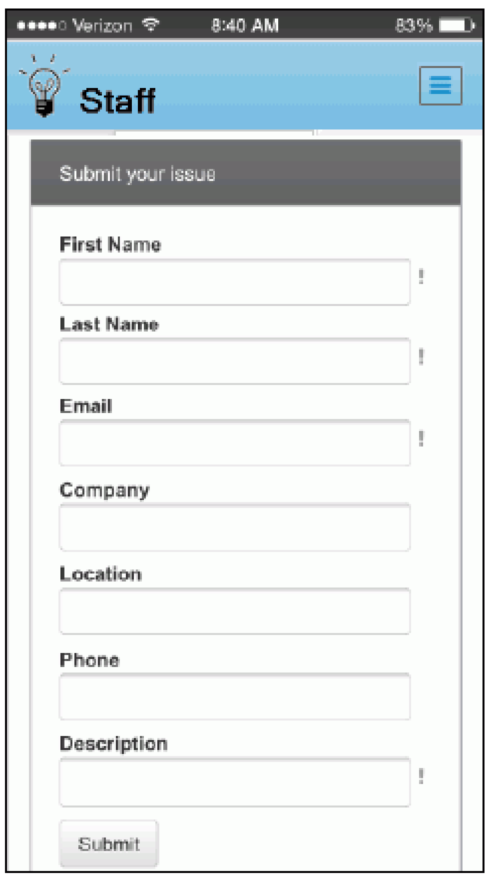
Use the fields in the lower half of the screen to configure the dialog that displays when authentication is not required and a customer submits an incident or change or uses the Easy Submit interface.



Select Yes in the **Show Company Field, Show Location Field,** and **Show Phone Field** options to include those fields in the dialog that displays when authentication is not required and a customer submits an incident or change or uses the Easy Submit interface.

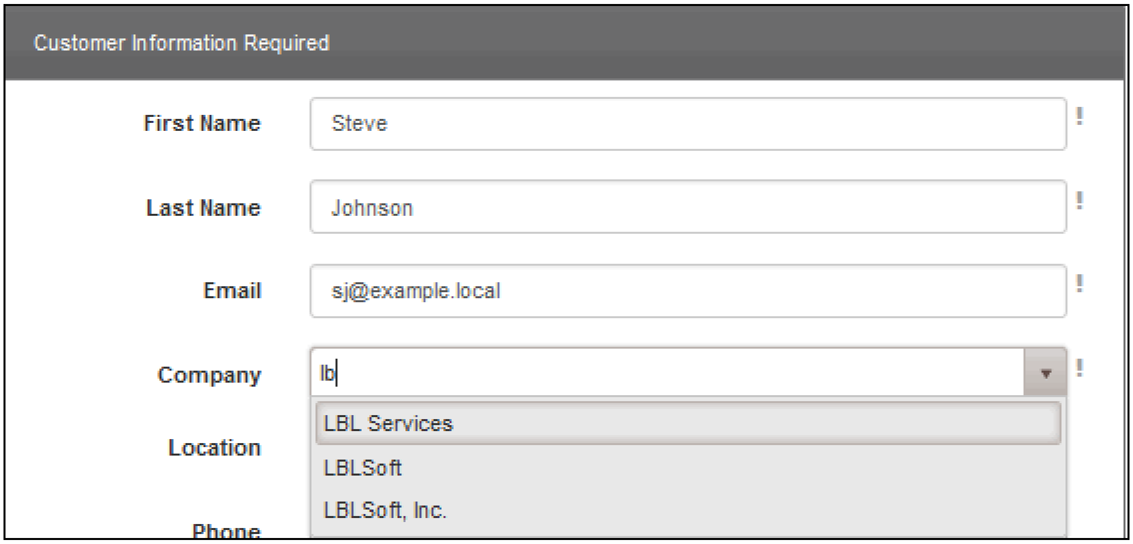


These options also affect the Easy Submit interface which enables customers to use an older version of a device that cannot render HTML5 to submit incidents.



The **Require** field will appear if you enable the Show Company Field, Show Location Field, or Show Phone Field settings; select Yes to require the customer to make an entry in the enabled field. An explanation point will appear to the right of the field. The **Company Entry Type** field will also appear if the Show Company Field setting is enabled; select:

- **Manual Entry** to display only an entry field with no dropdown providing a list of companies in iSupport, and no type ahead functionality that provides a list of companies matching characters entered.
- **Type Ahead Allowing Custom Entry** to include a dropdown providing a list of companies in iSupport and display a list of the company names that include any entered characters, but allow the customer to enter the name of a company that does not match an existing company name.



- **Type Ahead Not Allowing Custom Entry** to include a dropdown providing a list of companies in iSupport and type ahead functionality that provides a list of companies matching characters entered, but display the message "A company from the list must be selected." if a name is entered that does not match an existing company name.

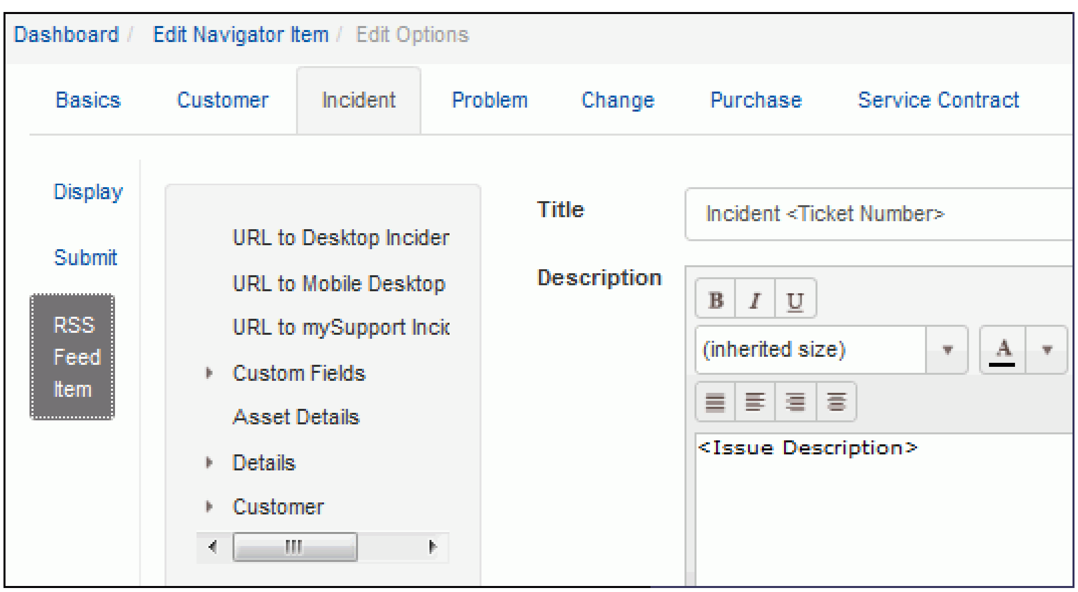
Settings for Service Contract Submission

Use the Service Contract Submit tab to enable service contract functionality for incidents and changes, courtesy items, and text to appear if no service contract is found.

Text to Display if No Service Contract Found - Enter the message to display if a customer without a valid contract attempts to submit an incident and/or change via the mySupport portal and courtesy work items are not allowed.

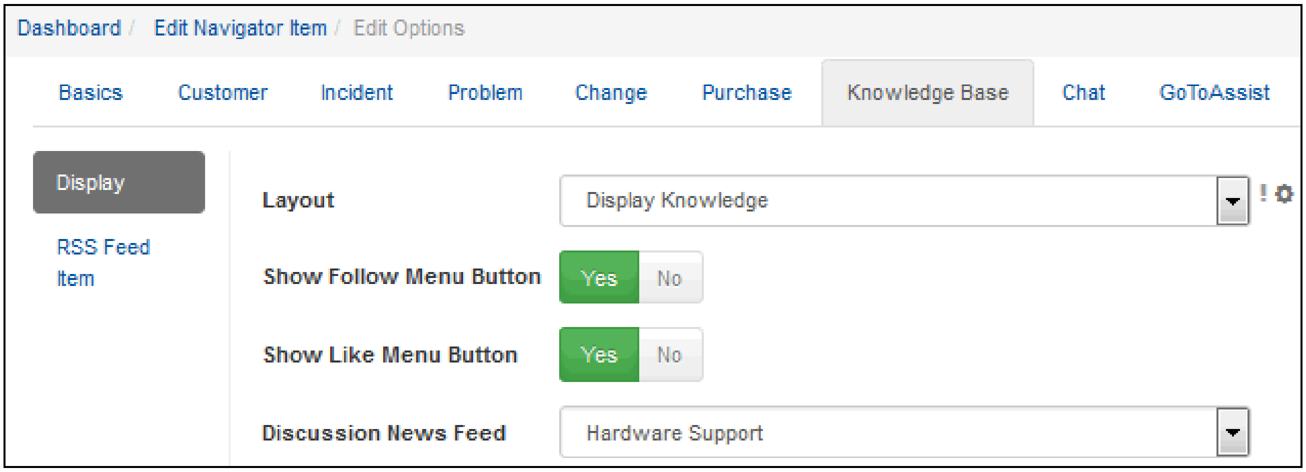
Configuring Incident RSS Feed Settings

RSS feeds send notifications when the contents of a custom feed change; for example, you can use an RSS feed to send updates to subscribers that don't have access to the mySupport portal. An RSS Feed option will appear after a custom feed is created for the user to subscribe. Use the RSS Feed item tab to enter the title and description for the RSS notification; use the Include Field link to add field values from the current record.

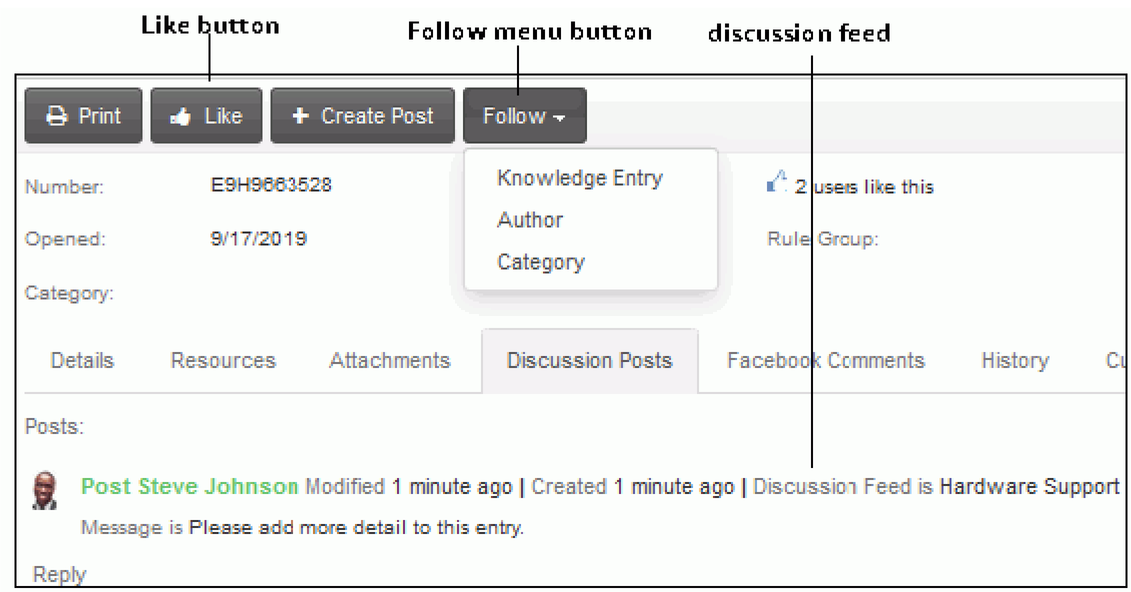


Configuring Knowledge Base Display and RSS Options

You can configure knowledge entries to appear in components and feeds. Use the Knowledge/Display options to configure the knowledge entry display screen that appears when a knowledge entry is opened.



You can specify the layout (fields and tabs) and Follow, Like, and Discussion News Feed options.



Show Follow Menu Button - Select Yes to enable a Follow button with a menu for following a knowledge entry, its author, and/or its category. Be sure to add a global feed with knowledge entries included to your portal; following a knowledge entry will display updates in the Global News Feed, following an author will display entries created by the author in the Global News Feed, and following a category will display entries created with the same category in the Global News Feed. Customers can stop following entries via Account Settings.

Show Like Button - Select Yes to display a Like button and enable the customer to register a like for an entry, to which posts will be added via the Create Post button.

Discussion News Feed - Select the discussion feed (configured via the Desktop) to which any posts created via this entry will be included.

Configuring Knowledge RSS Feed Settings

RSS feeds send notifications when the contents of a custom feed change; for example, you can use an RSS feed to send updates to subscribers that don't have access to the mySupport portal. See "Configuring Incident RSS Feed Settings" on page 76 for more information.

Configuring mySupport Chat

iSupport includes a built-in chat feature that enables you to configure chat responses, display chat to customers that are not authenticated, set up support reps available for chat, automatically create incidents and include chats in incident history. For more information on this feature, see “mySupport Chat” on page 35. To configure mySupport chat:

- Enable the mySupport Chat feature in the Core Settings | Feature Basics screen.
- Use the Core Settings | Groups screen to make support representatives available for chat and configure options for the support representative side of the chat. Enable chat via the Details tab and then set other options via the Chat tab. You can also use the Options and Tools | Customize | Chat Themes screen to configure the colors for the fonts and elements in the Chat dialogs between support representatives and support representatives and customers on the Desktop.
- Use the Chat tab in the Core Settings | mySupport | Portals | Options screen to configure the Chat Now button and/or dialog for the customer side of the chat on the mySupport portal. See the next section.
- Use the Core Settings | mySupport | mySupport Chat Responses screen to enter responses for support representatives to select in the customer chat dialog; see “Configuring mySupport Chat Responses” on page 81.
- If you wish to include a link in the mySupport navigator for starting a mySupport chat session, add it via the Core Settings | mySupport | Portals | Navigator screen.
- If you wish to include a chat transcript in custom notifications, you can use the Chat Transcript include field in those screens and the associated Customer Updated via mySupport Chat event in customer rules. You can also utilize the Incident Updated via mySupport Chat event when configuring Incident rules.
- If you wish to create custom views of chat activity, use the mySupport Chat Requests data source in the View Designer.
- Administrators can view chat history via the Options and Tools | Administer | Rep Chat History screen in the Configuration module.

Setting Chat Options

The upper portion of the Chat tab in the Options screen contains settings for enabling chat for customers that are not authenticated, designating the support representative groups (enabled in the Support Representative Group screen) to which chat requests will display, and chat dialog timeout options.

Chat Enabled - Select Yes to display the fields for configuring chat options.

Show Chat to Unauthenticated Customers - Select Yes to display the chat button and/or flyout dialog to customers that are not logged in to the mySupport portal.

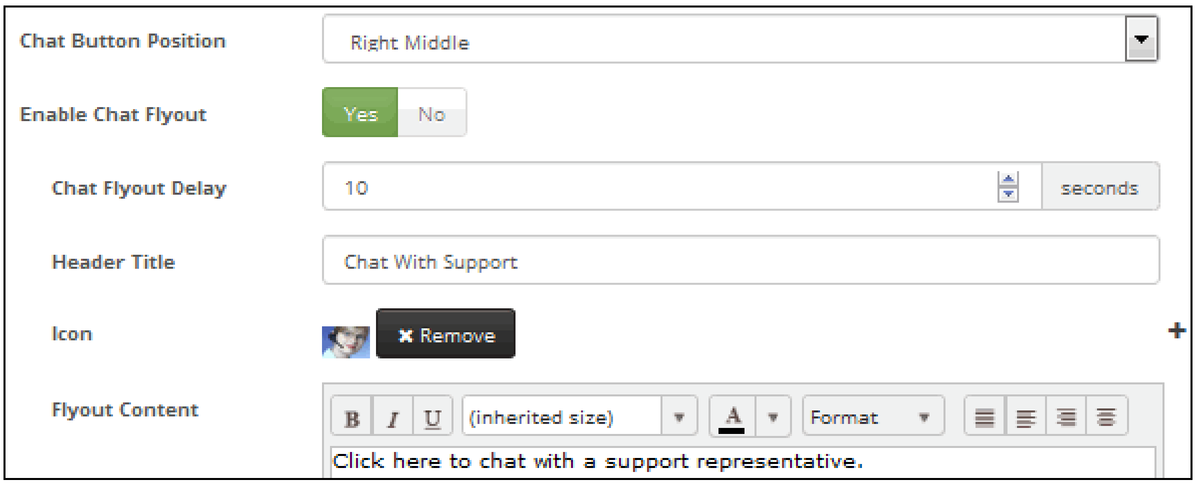
Available to Rep Chat Groups - The groups designated as available (via the Available for Customer Chat field in the Support Representative Group screen) appear; select the group(s) to which chat requests will display. If multiple groups are selected, the customer does not select a group (if No is selected in the Show Rep Chat Group Selection field below), and the support representative who accepts the chat is available in multiple groups, a list of those groups will appear for selection.

Show Rep Chat Group Selection - If more than one group is selected in the Available Rep Chat Groups field, select Yes to display the group dropdown field.

Rep Name Display Type - Select how to display the names of support representatives: by first name or by full name.

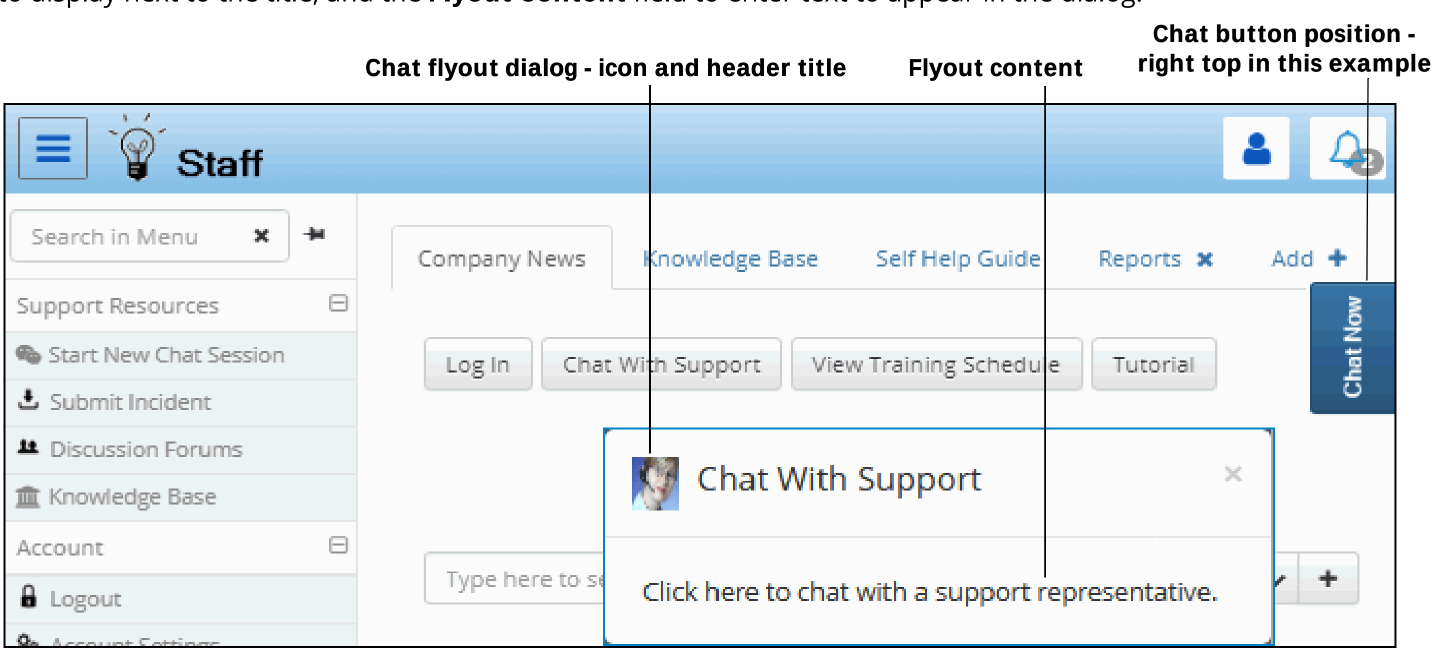
Chat Button Position and Flyout Options

Use these fields to set options for the appearance of the Chat Now button and dialog.



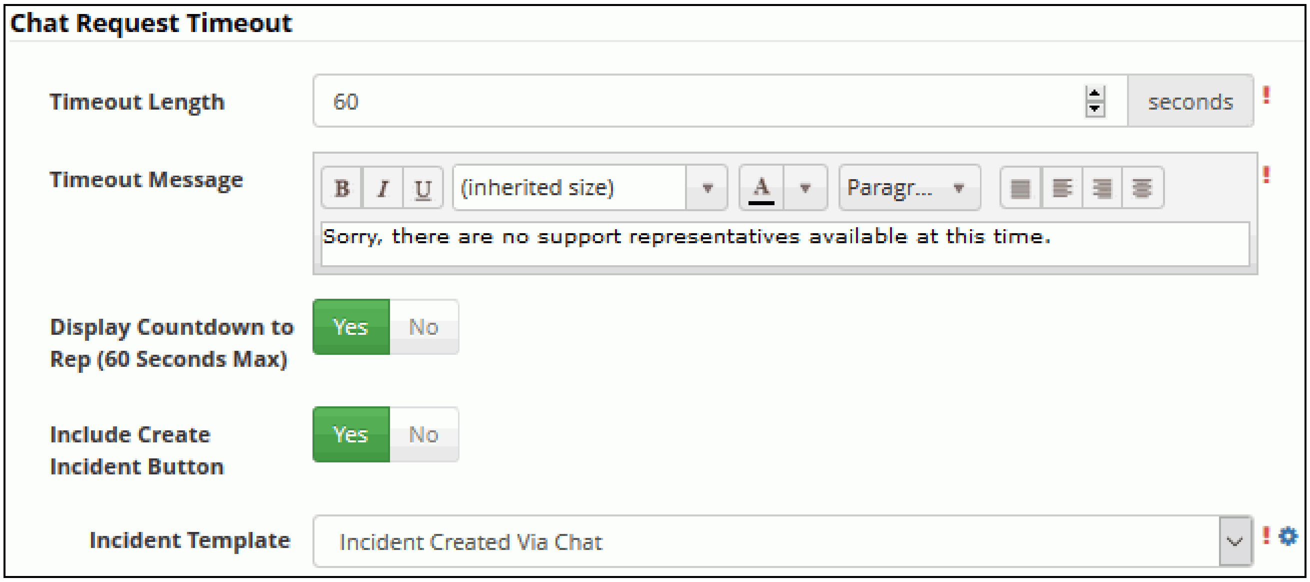
Chat Button Position - Select the position on the mySupport portal screen on which the Chat button should be anchored; you can display it on the top, middle, and bottom of the left or right sides, as well as the left, middle, and right sides of the bottom of the screen.

Enable Chat Flyout - Select Yes to display a dialog on the mySupport portal for the customer to click to initiate a chat. Use the **Chat Flyout Delay** field to enter the number of seconds to lapse before the dialog appears on the mySupport portal. Use the **Header Title** field to enter text for the top of the dialog, the **Icon** field to select an image to display next to the title, and the **Flyout Content** field to enter text to appear in the dialog.



Configuring Chat Request Timeout Options

Use these fields to configure options for what will happen when a support representative does not answer a chat.

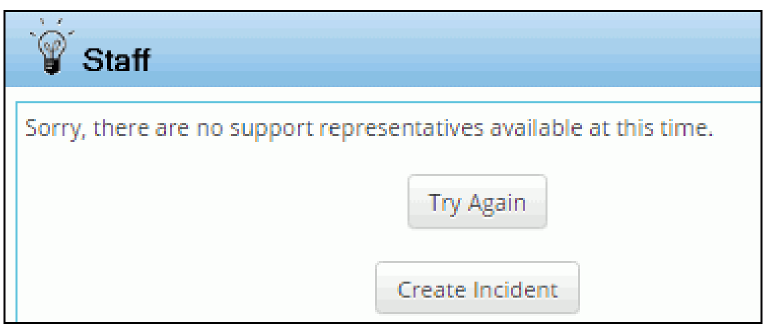


Timeout Length - Enter the number of seconds in which the chat dialog should appear on the mySupport portal before displaying the timeout message. Note that this does not affect the chat dialog on the Desktop.

Timeout Message - Enter the text to appear in the chat dialog after the timeout length has been reached.

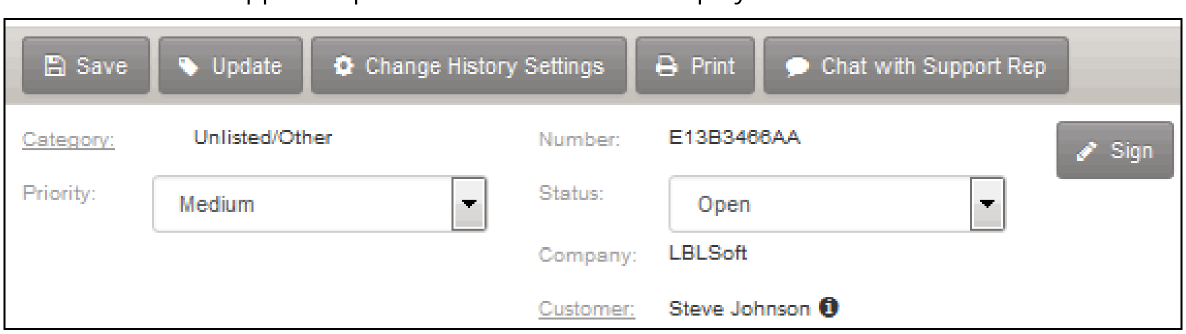
Display Countdown to Rep - Select Yes to include the amount of time before the chat times out; it will be the number of seconds in the Timeout Length field, up to a maximum of 60 seconds.

Include Create Incident Button/Incident Template - Select Yes to include a Create Incident button under the timeout message and Try Again text in the chat dialog. An incident with the selected incident template will be automatically created when the customer clicks the button. Note that the setting in the Append Description/ Resolution to Existing Text field for the template will determine whether the chat request text will be included in the incident's Description field.

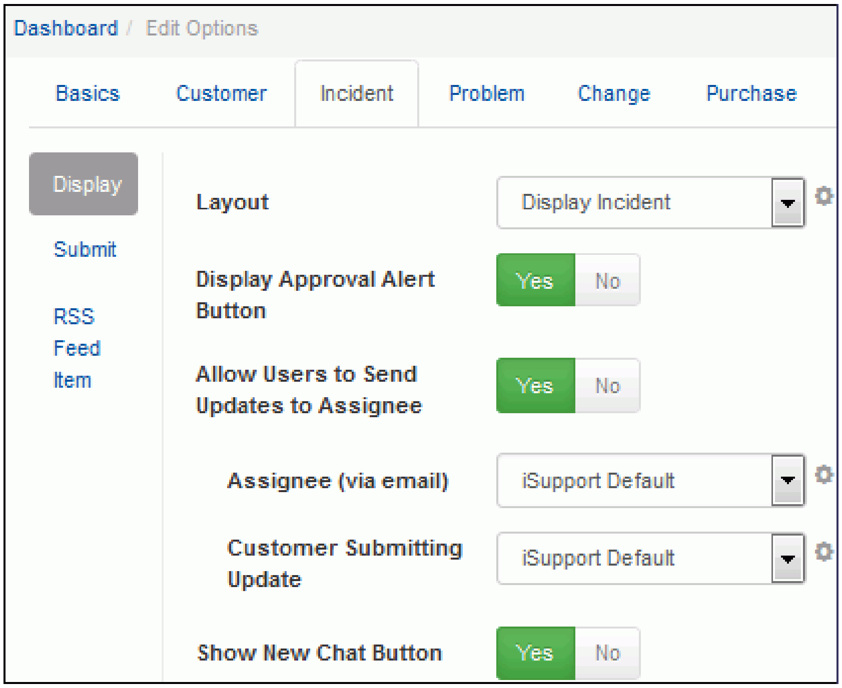


Configuring a Chat Button on the Incident Display Screen

You can include a Chat with Support Rep button on the incident display screen.

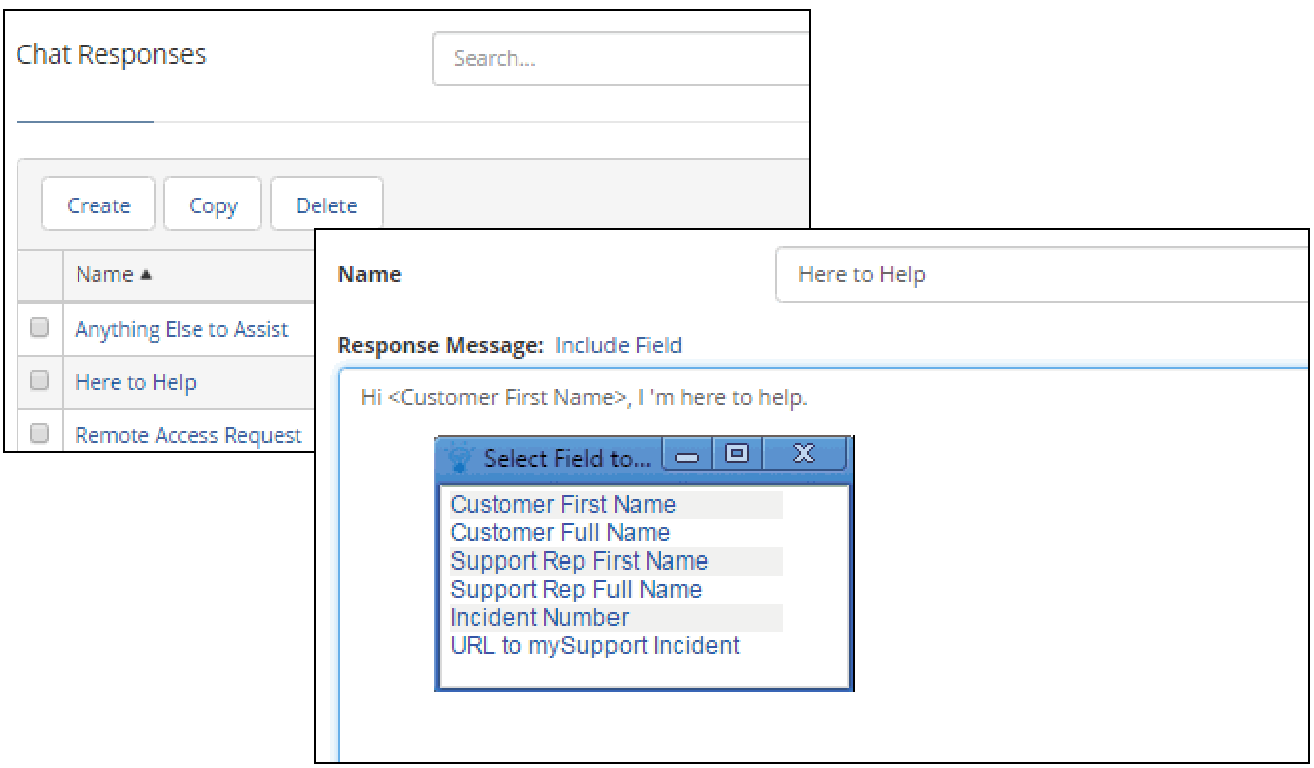


To enable this button, select Yes in the Show New Chat Button field in the Incident/Display portion of the Options screen.

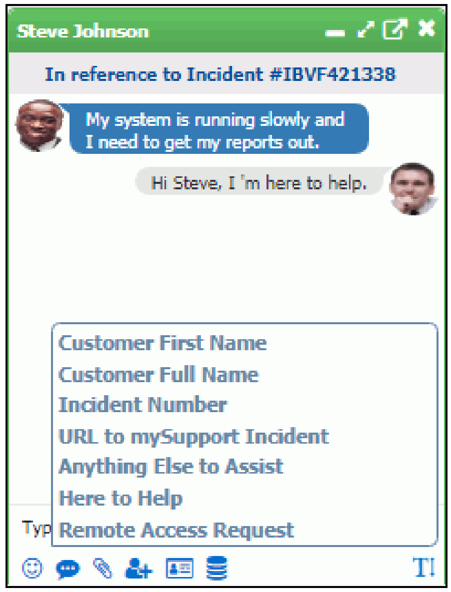


Configuring mySupport Chat Responses

Use the Configuration | mySupport | mySupport Chat Responses screen to enter responses for support representatives to select in the customer chat dialog. You can use the Include Field link to add first and full name from the customer and accepting support representative's Profile record, as well as the number and URL of the incident created when the chat is accepted in the Response Message field.



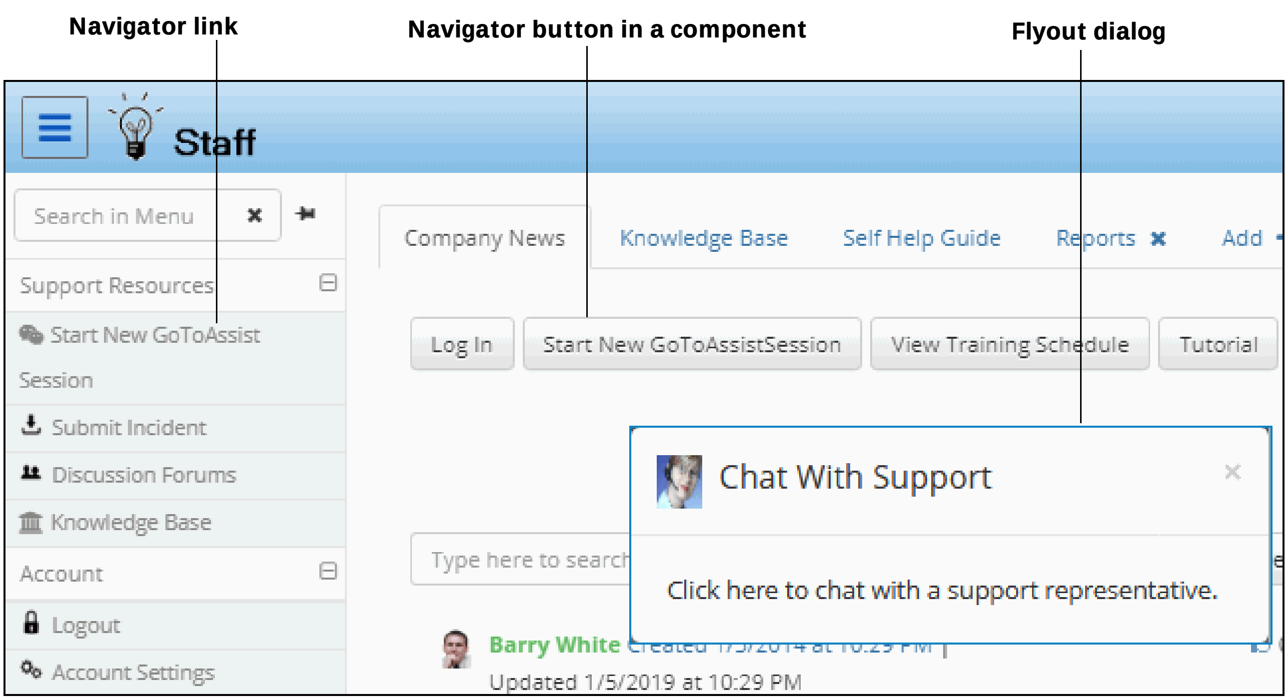
Note that the entry in the Name field will appear for selection in the chat dialog; the entry in the Response Message field will appear upon selection.



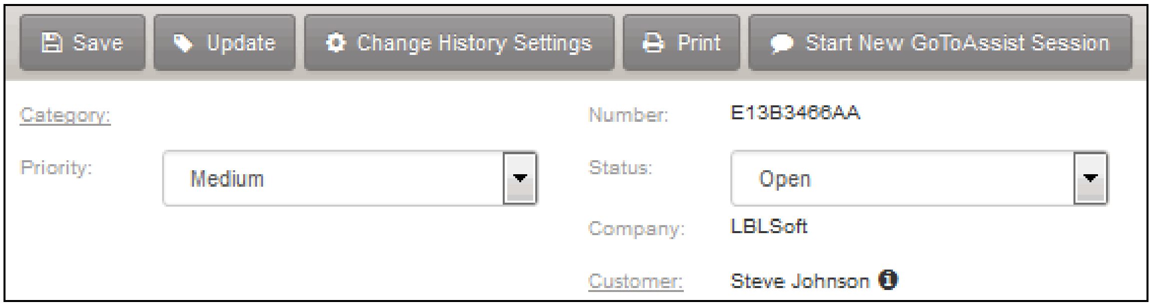
Configuring Citrix GoToAssist Remote Support Access

iSupport integrates with Citrix GoToAssist Remote Support, enabling customers to access the Citrix® GoToAssistPortal. (Note that this functionality does not automatically capture chats or add recorded sessions.) Customers can start a Citrix GoToAssist Remote Support session on a mySupport portal via the following:

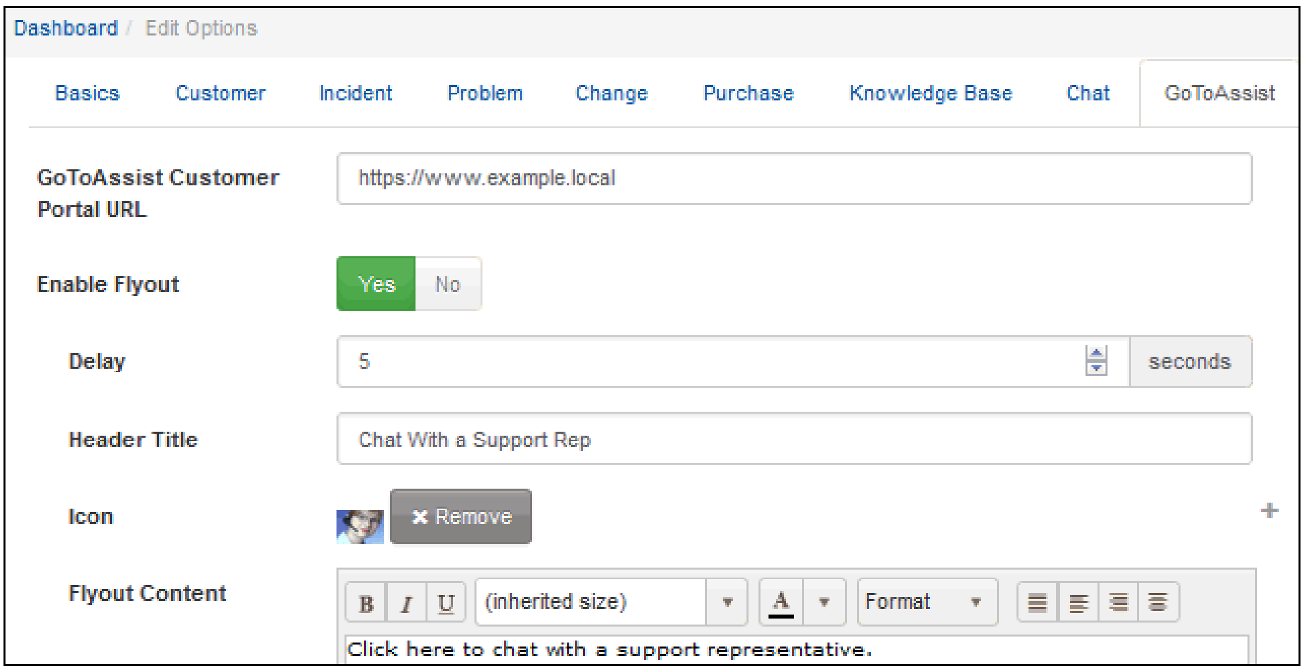
- A button, navigator link, and/or dialog:



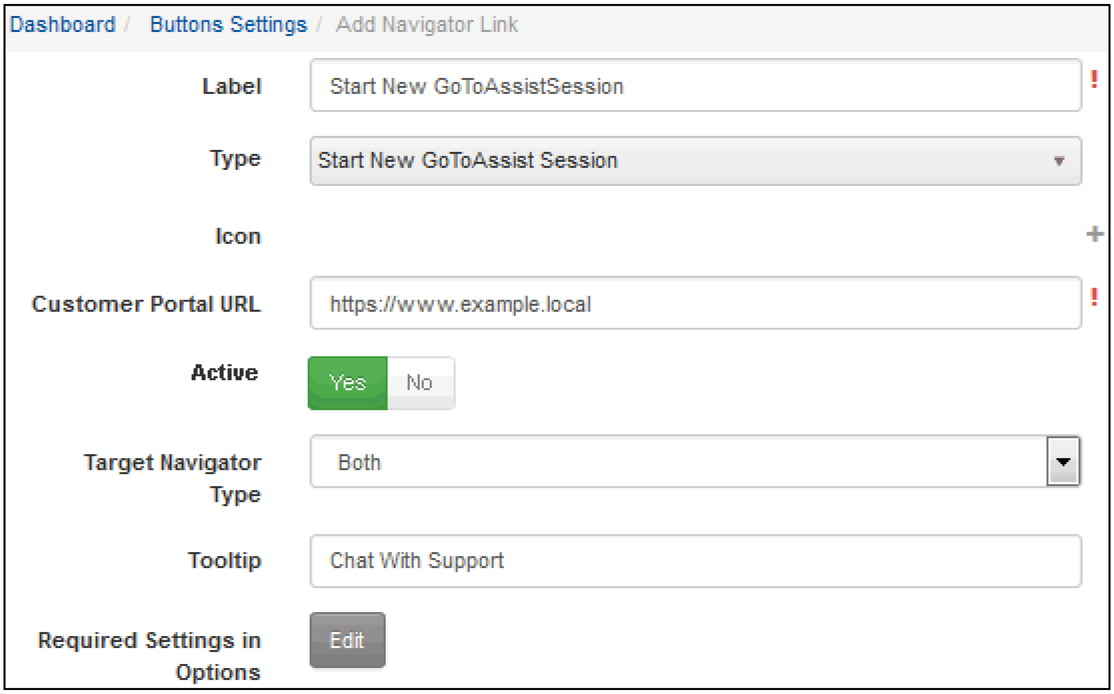
- A Start New GoToAssist Session button in the Incident Display screen:



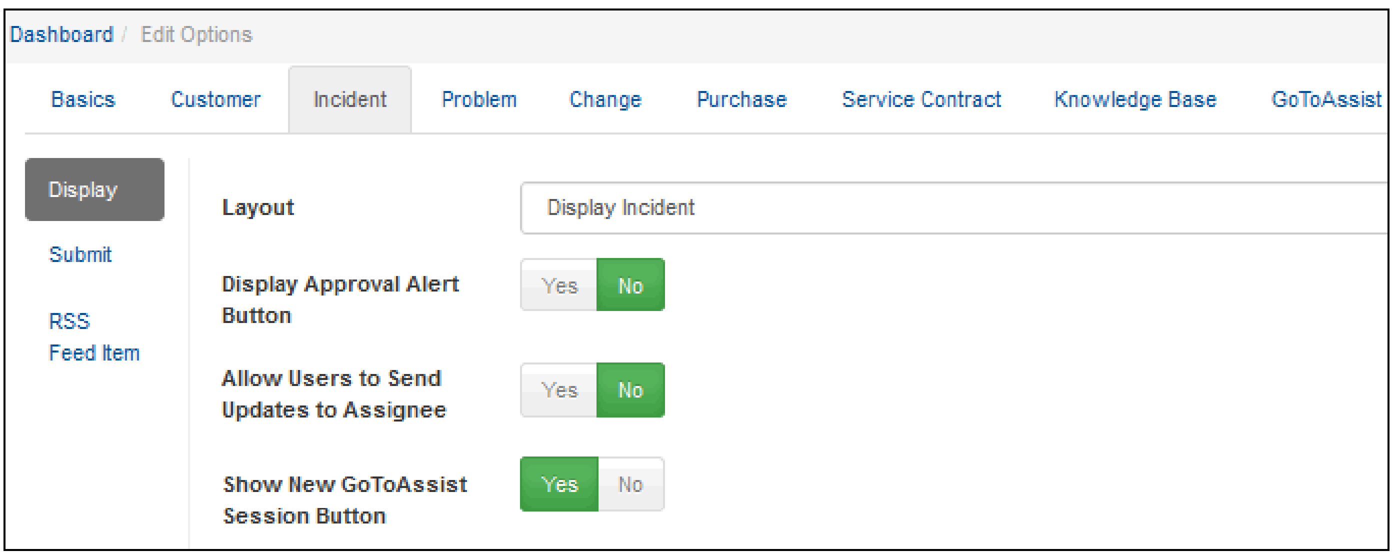
To configure these features, first ensure that Citrix GoToAssist functionality is enabled in the Core Settings | Feature Basics screen. Then use the GoToAssist tab in the mySupport Options screen to enter the URL for the Customer Portal that you have configured via GoToAssist; this URL will be used for the Start New GoToAssist Session button in the incident display screen as shown above. To configure a popup dialog to appear for customers to click to start a session, select Yes in the Enable Flyout field and complete the fields below it.



To configure a navigator link on the mySupport portal, use the Start New GoToAssist Session type in the link definition in the mySupport Navigator screen.



To configure the Start New GoToAssist Session button on the Incident Display screen on the mySupport portal, select Yes in the Show New GoToAssist Session Button field in the Incident/Display portion of the Options screen.



Configuring mySupport Features

The following is where you can find information for the features available on mySupport portals:

Work Item Submission

Easy Submit - see page 49, page 73.

Incident/Change/Purchase Submit - see page 73.

Incident/Change Template and Hierarchy Template - see page 14 and the online help for configuration information.

Service Catalog/Service Catalog Section - see page 14 and the online help for configuration information.

Work Item Viewing and Searching

Chart/Chart List - see page 16.

Feed - see page 89.

(Incident, Problem, Change, Purchase, Service Contract, Service Request)

Global Search - see page 94.

Incidents/Changes Pending My Approval - see page 21.

My Archived Incidents News Feed - see page 21.

Search Incident Archive - see page 22.

View/View List - see page 22.

Informational Elements

Embedded Content - see page 97.

Event Calendar - see page 97.

Facebook Monitor - see page 102.

FAQs - see page 102.

FAQ Topics - see page 102.

Headlines - see page 103.

Help - see page 26.

Knowledge Base - see page 104.

Link to PDF - see page 109.

Rich Text Area - see page 110.

Scheduled Changes - see page 110.

Self Help Guide - see page 111.

Tutorial - see page 115.

Twitter Monitor - see page 118.

Communication Features

iSupport Chat - see page 78.

GoToAssist - see page 82.

Discussion Feed/Feed List - see page 90.

Miscellaneous

Account Settings - see page 7.

Home - see page 26.

Login and Logout - see page 107.

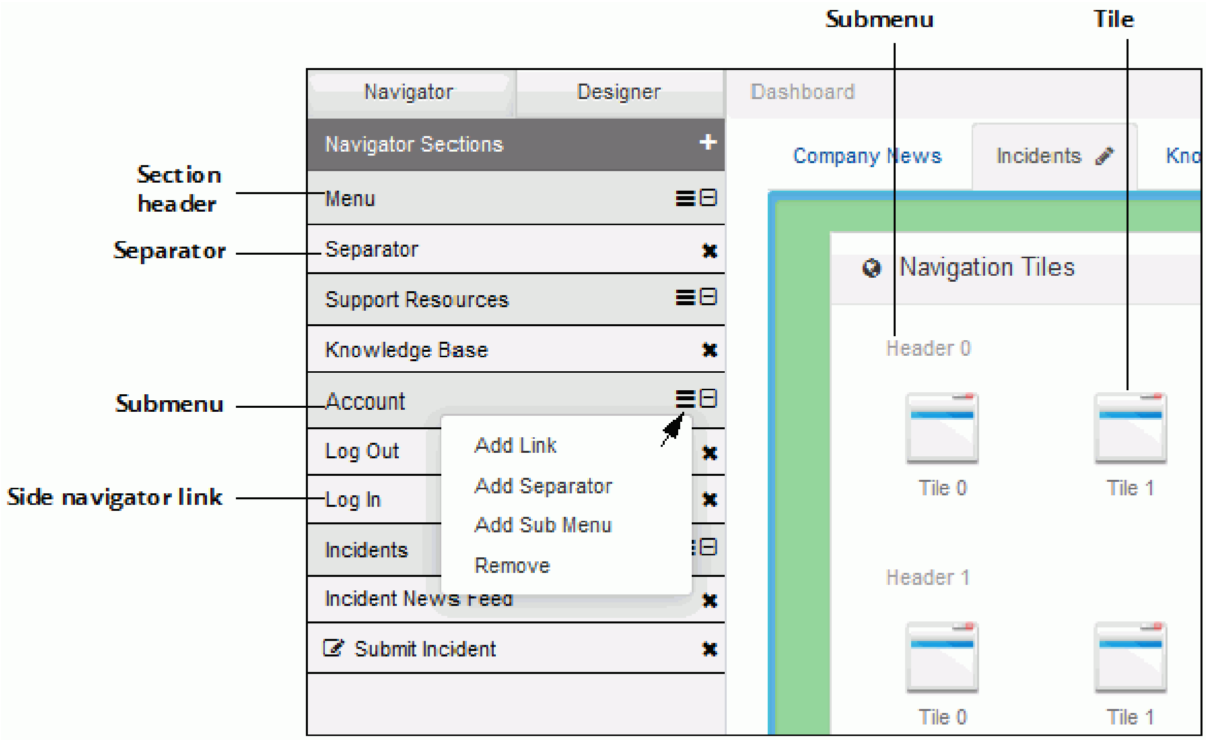
Configuring Navigator Links, Designer Components, and Buttons

A portal navigator enables access to features and content; it can appear as a list of links on the left side of a portal, as a set of icons in a navigation tile component, or both. Navigators are associated with option sets, but you can save navigators for use with other option sets. iSupport features can also be accessed via buttons in a component;

Navigator Links

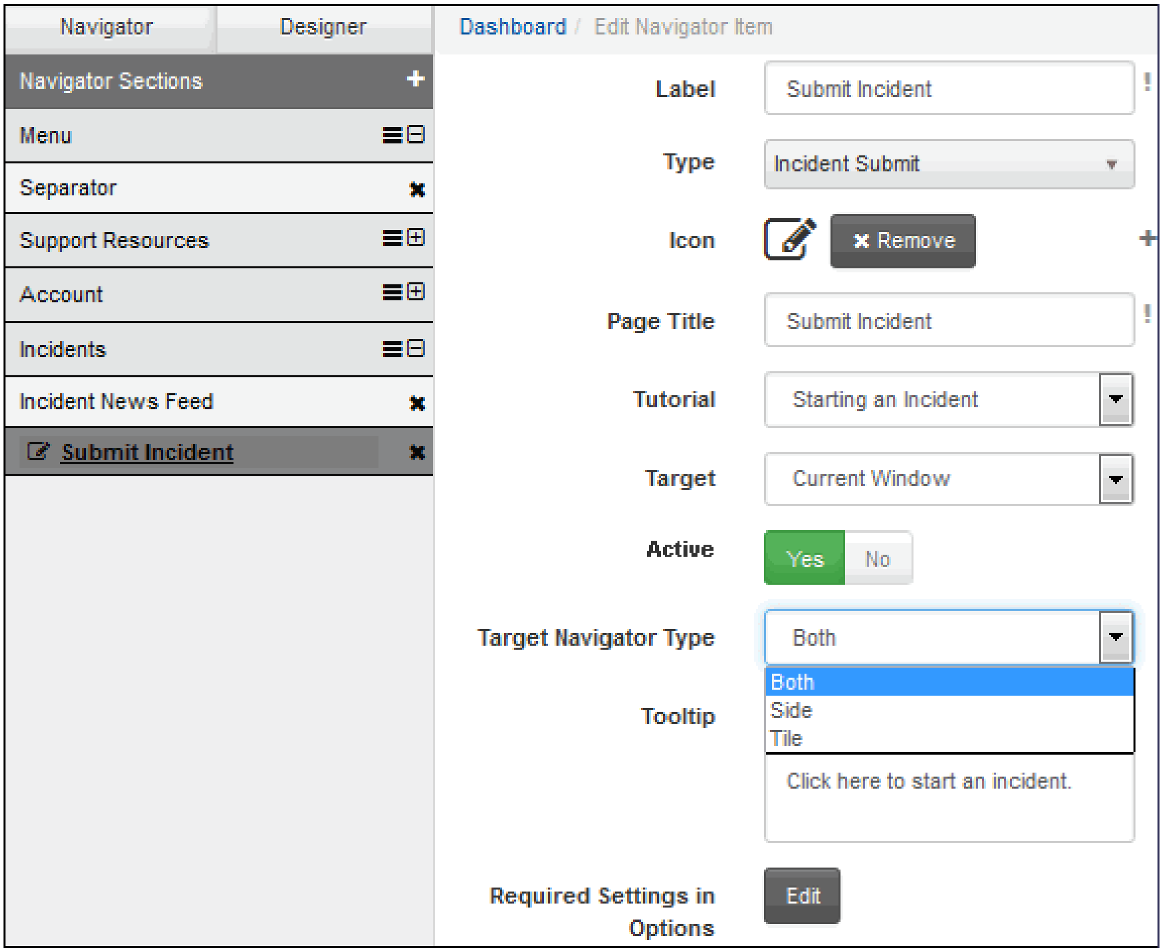
Links can be included on a left side navigator (accessed by the menu in the upper left corner of the screen) and as icons in the Navigation Tiles component on a dashboard. Features accessed via a navigator link will display full-screen, and you can associate a tutorial to display the first time a customer accesses the link.

Use the mySupport Navigator screen to define the section headings, submenus, and links available in the navigation pane and/or tiles on a mySupport portal. When creating a new navigator, you'll first need to add a section header via the Add Section option; then use the Add menu to add links, separators, and submenus.



To display the left side navigator opened and pinned when a customer first accesses the portal, use the Pin Navigator by Default field in the Settings section on the Basics tab in the Options screen.

The Edit Navigator Item screen will appear for configuring a link, submenu, or separator. Note that the fields will change depending on your selection in the Type field, and you can drag and drop links under section headings.



Label - Enter the label to display for the link in the left side navigator and in the tile component.

Type - Select one of the following:

- **Custom URL** to display a web page in the current window or a new window. The URL field displays for you to enter the web page URL (example: http://www.iSupport.com). Note: the site must be able to load into an iFrame if using Current Window as the target; otherwise, set the target to New Window.
- **Submenu** to include an independently collapsible submenu in the section.
- **Separator** to include a double line within a section.
- A **predefined iSupport feature**: Select the functionality to access via the link.

Icon - If desired, select + Choose Icon to upload a .png, .jpg, .gif, or .bmp file to appear to the left of the link.

Page Title - Enter the text to appear in the browser tab when the details of the selected feature appears.

Tutorial - Select the tutorial to appear when the customer clicks the navigation item for the first time..

Target - Select:

- New Window to display the link content in a new window.
- Current Window to display the link content in the entire browser window.

Active - Select No to prevent the link from appearing on the navigator.

Target Navigator Type - Select:

- Side to display the link in the left side navigator (accessed by the menu in the upper left corner of the screen).
- Tile to display the link in an icon tile in the Navigation Tile component on a dashboard (added via the Designer).

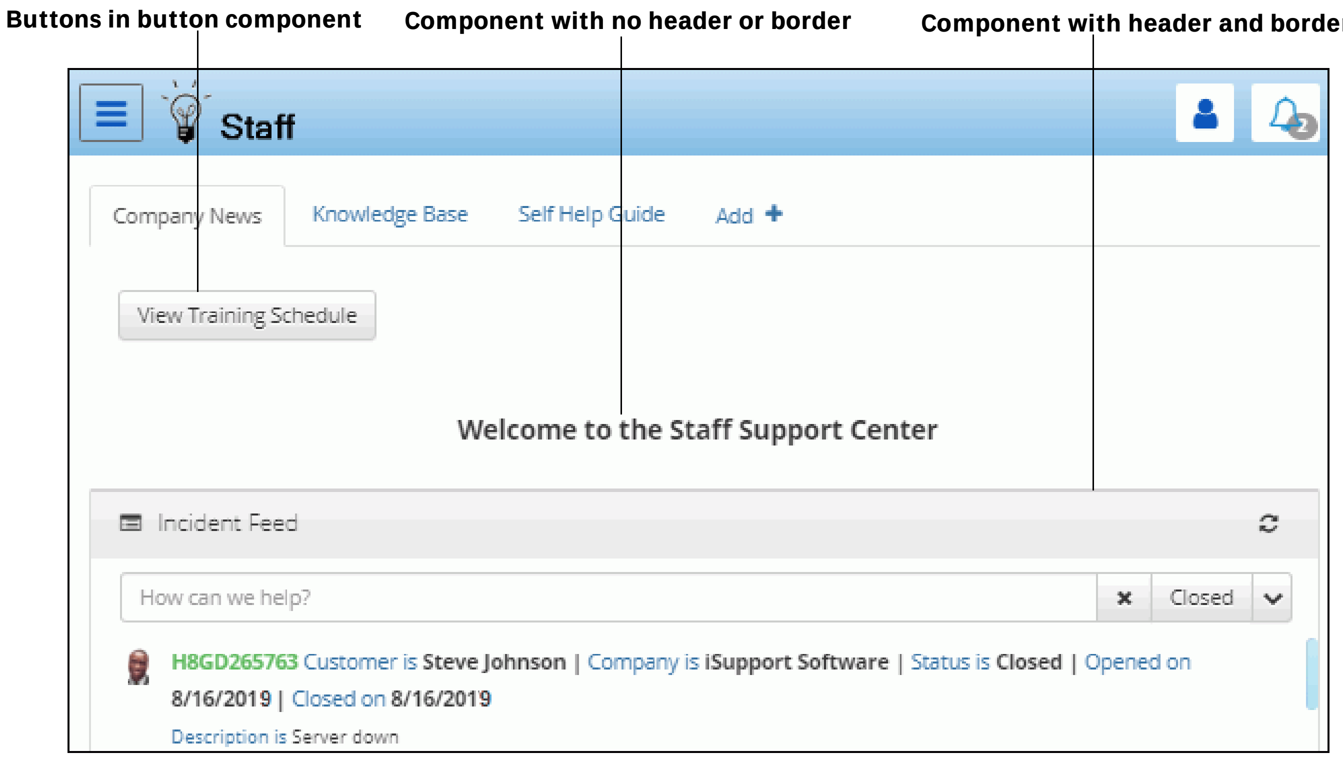
- Both to display the link in the left side navigator and in the Navigation Tile component on a dashboard.

Tooltip - Enter the text to appear when you hover over the link with your mouse.

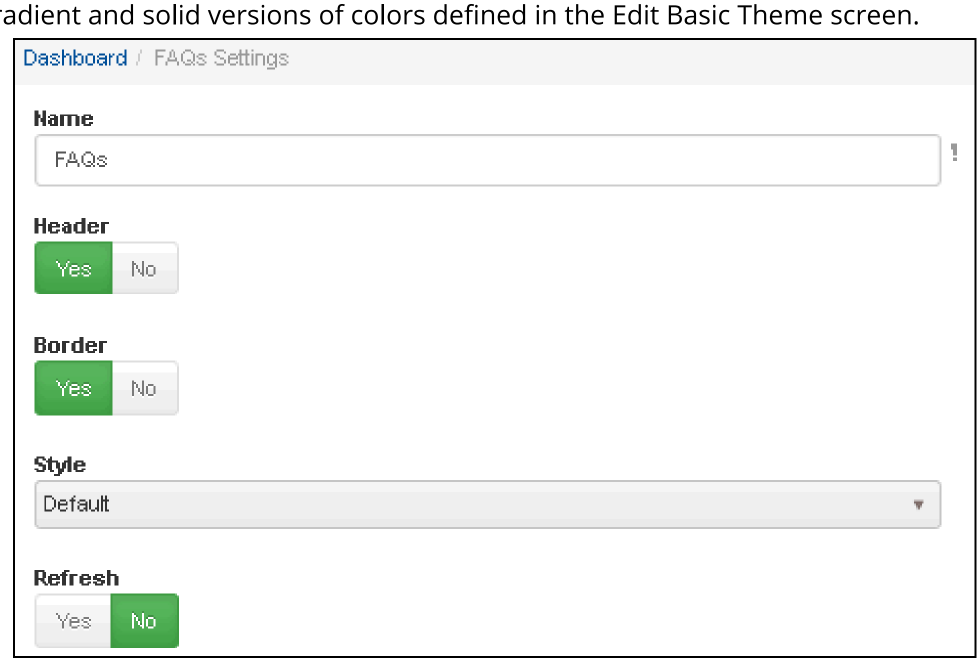
Required Settings in Options - Click the Edit button to display the Options settings applicable to your selection in the Type field. See "Configuring mySupport Options" on page 57 for more information.

Buttons and Dashboard Designer Components

You can provide access to mySupport features via buttons and components, which are small frames that are placed in rows and columns on a dashboard. For components, you can enable a border and header at the top and select the alignment (left or center) and style color. Buttons in the Button component provide one-click access to features.

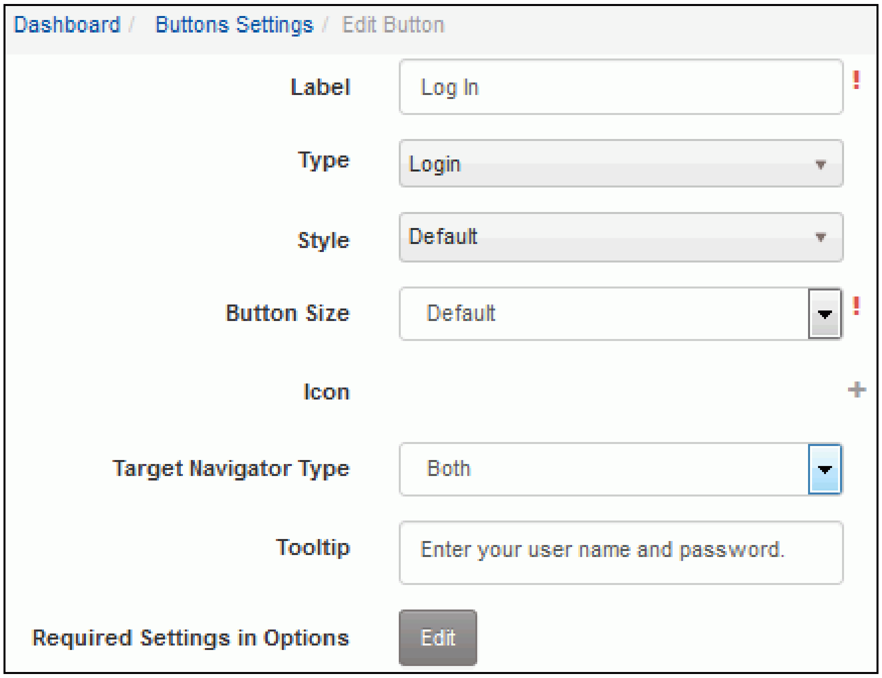


To include a component, drag it from the Designer list on the left onto a row or column on a dashboard. The Component settings dialog appears with settings for enabling a header and border and other options applicable to the feature. If a header is enabled, a Style field will appear for selecting color/shade of the component header. Options include gradient and solid versions of colors defined in the Edit Basic Theme screen.



After adding a component you can click on the icon in the upper left corner of the header to display the Select Icon dialog for selecting a different icon. Note that you cannot disable this icon. After adding a component you can click on the icon in the upper left corner of the header to display the Select Icon dialog for selecting a different icon. Note that you cannot disable this icon.

To configure a component with buttons, drag the Buttons component onto a row or column on a dashboard. In the component settings dialog, click the Add link and specify the button name, feature to access, style, size, icon, and tooltip.

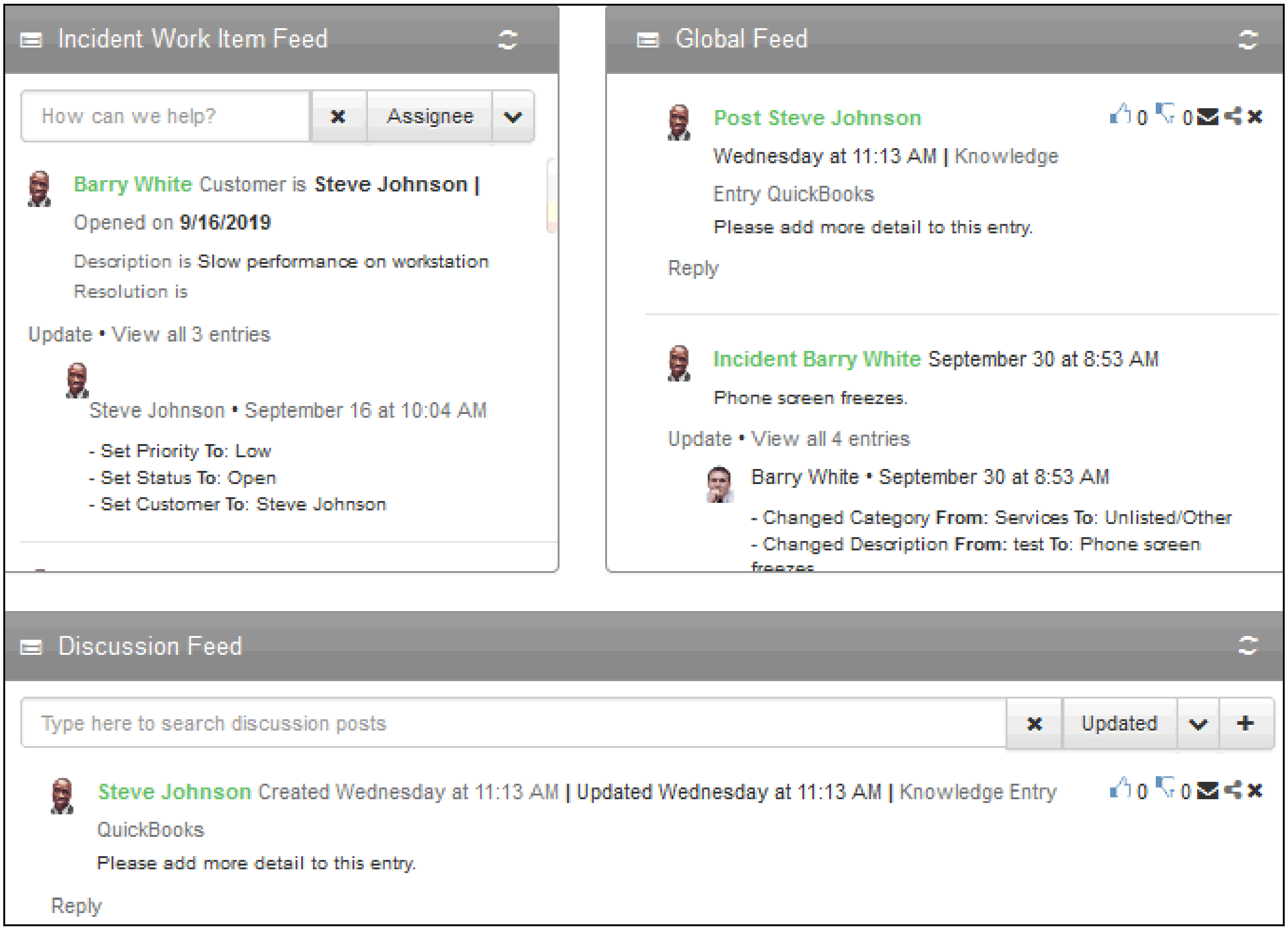


Work Item Viewing and Searching

Feeds

iSupport includes two types of feeds: discussion feeds and work item feeds, which can be based on a specific work item type or global with more than one work item type. A global search bar will always appear for feeds accessed via a navigator; in components, for all feed types except global and discussion, inclusion of a search bar is configurable.

(Add the Global Search component if you wish to include search with a global feed component.) See “Feeds” on page 17 for more information.



Discussion Feeds and Feed Lists

On mySupport you can:

- Link to a list of multiple feeds (via the Discussion News Feed List navigator link type) or a single discussion feed
- Include in a component a single discussion-post-only feed
- Link to or include in a component all discussion posts in a global feed along with other work items if desired; see “Configuring Global News Feeds” on page 94 for more information.

See “Discussion Feeds” on page 40 for more information on discussion feed features on mySupport portals. Discussion feeds are created and managed via the Desktop.

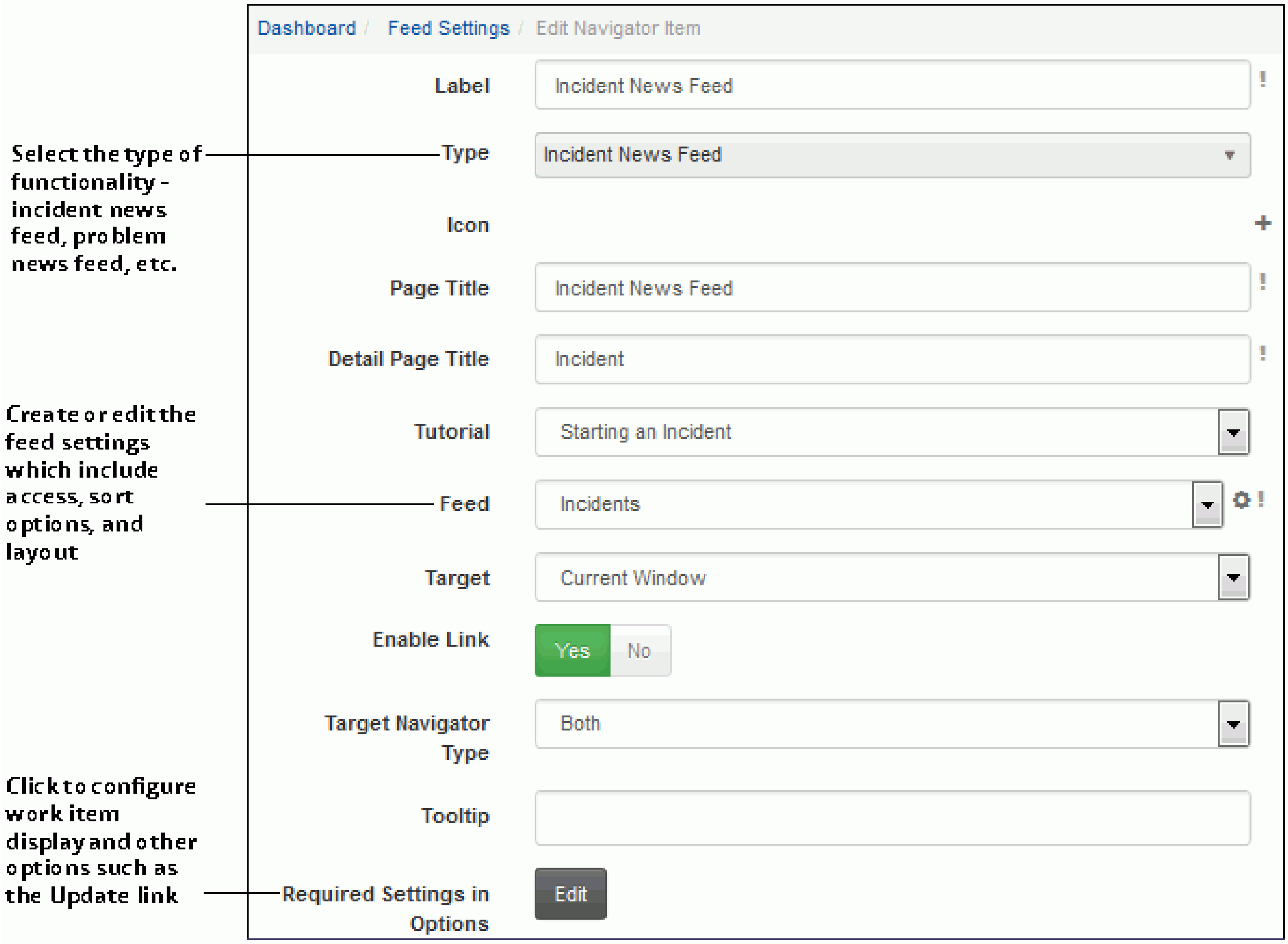
Work Item Feeds

Work item feeds will appear after a customer logs in. Once you create a work item feed, it will be saved even if it is not used on a portal. Use the Manage Portal Items screen to copy and delete feeds; see “Managing Portal Items” on page 122 for more information.

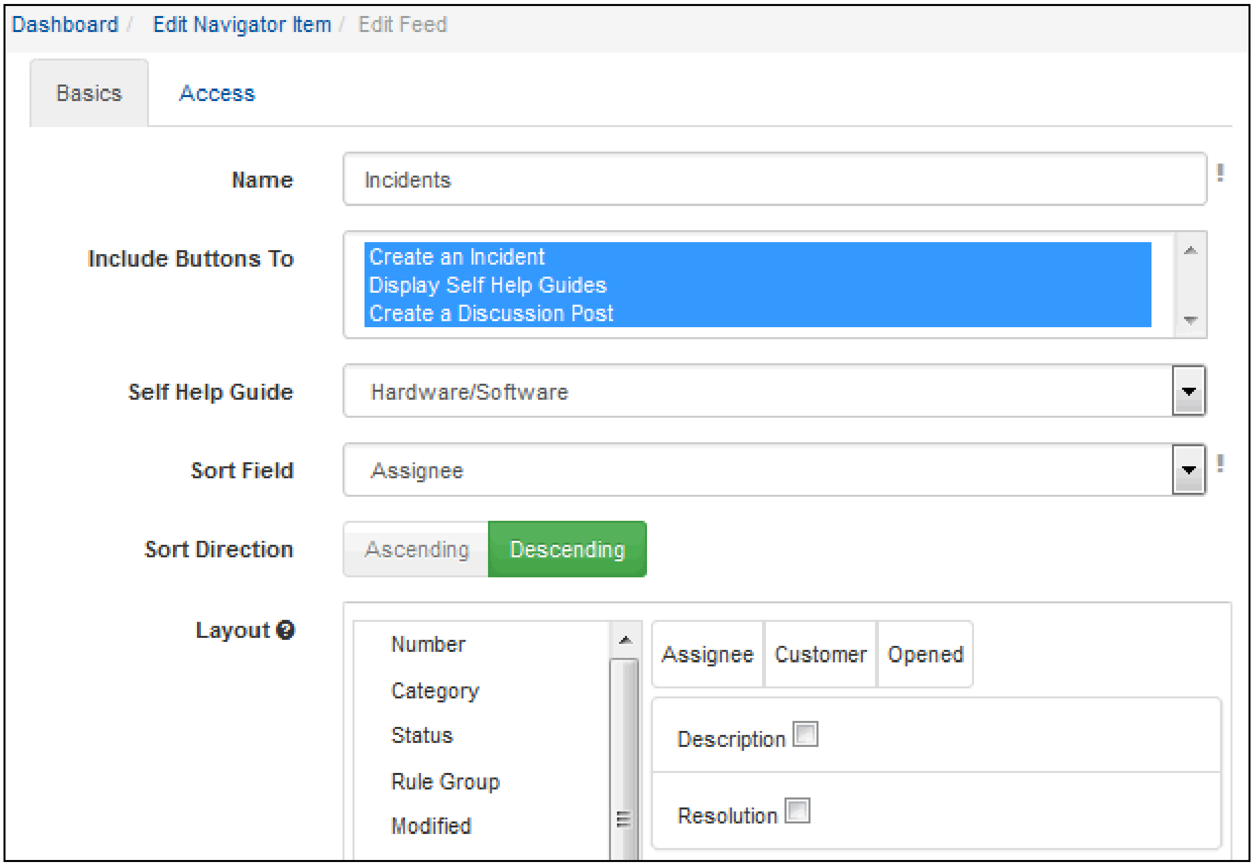
Configuring Feed Basics

Feed configuration involves setting the access, search, sort options, and layout (fields to display) for a feed. Note that the customer can change the sort field and direction. The initial settings are different depending on whether you are including the feed in a component or displaying the feed via a navigator link.

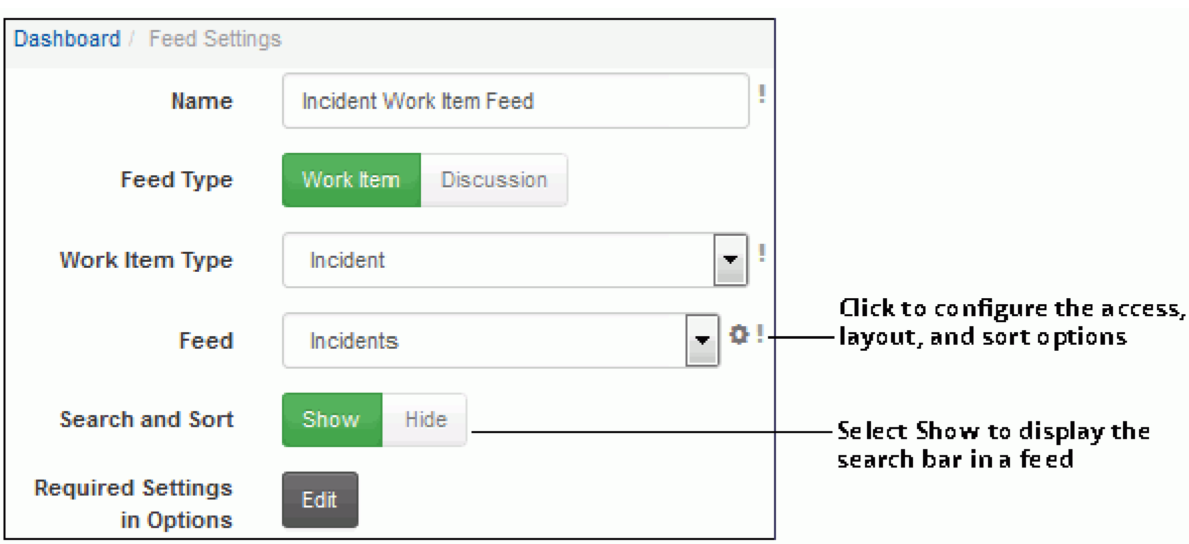
- **For navigator items,** you'll first use the Navigator Item screen to select the type of navigator item and other navigational options. In the Type field you can select a news feed for incidents, archived incidents, problems, purchases, changes, service contracts, and service requests.



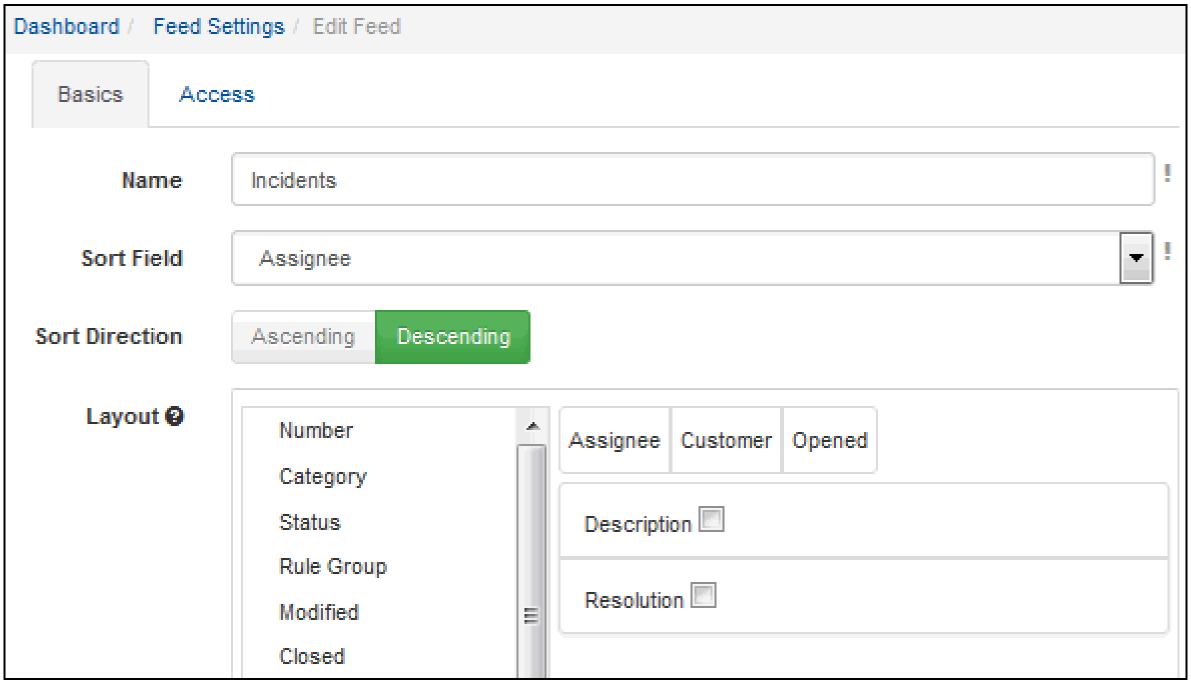
Navigator items display functionality in full screen with a global search bar; the **Include Buttons To** field is included in the Edit Feed dialog for enabling buttons that will create an incident, display a self help guide, start a chat, or create a discussion post to appear after text is entered in the search bar. Use the Layout field to add the fields that should display in the feed.



- **For components,** you'll select a specific work item type. A **Search and Sort** field is included for including a search bar.

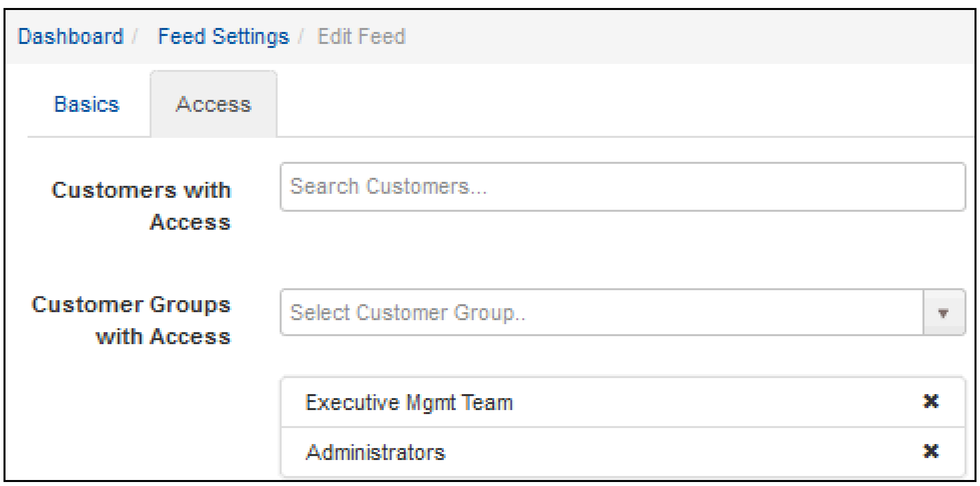


Click the Configure icon next to the Feed field to configure the layout and sort options.



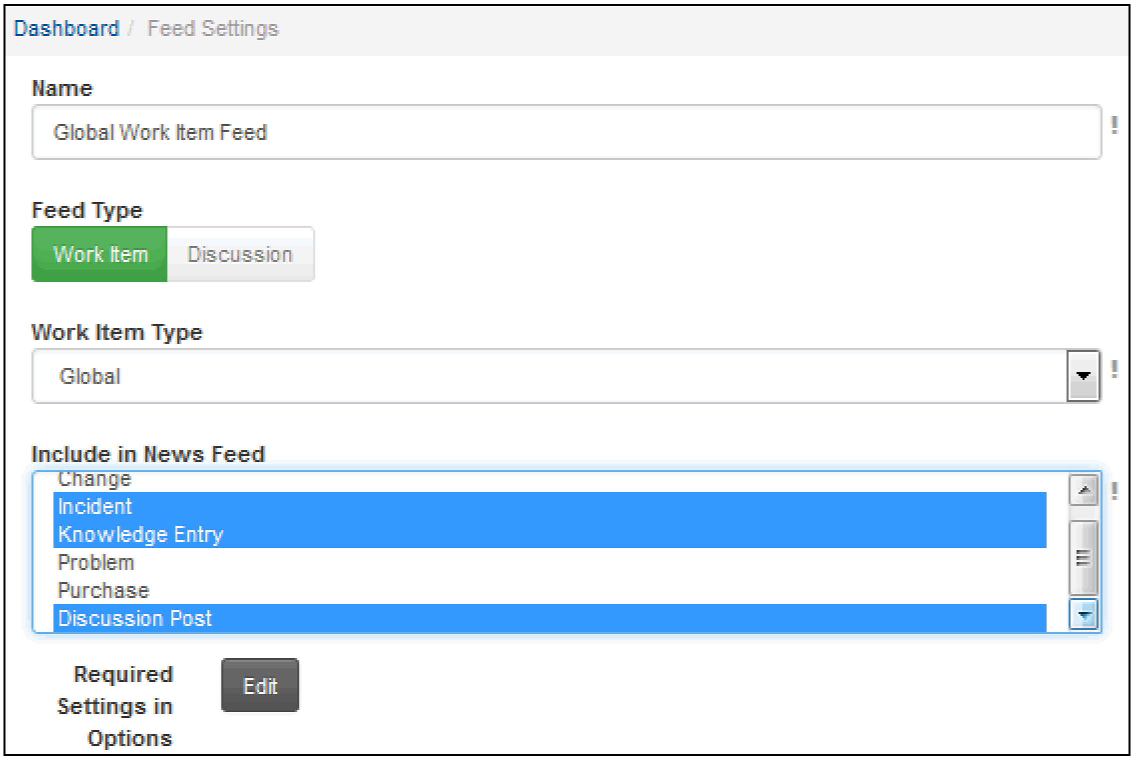
Configuring Access

Use the Customers With Access and Customer Groups With Access fields on the Access tab to select the customers and customer groups that can view feed entries. If left blank, no restrictions will be in effect.



Configuring Global News Feeds

Global work item feeds contain multiple types of entries, including work items and discussion posts. In the Feed Settings dialog, select the types of items to include in the feed.



Include in News Feed/Required Settings in Options - Select the types of items to include in the feed; hold down the Ctrl key to select multiple entries. These items are included depending on enabled features. Items appear on the news feed in descending order according to the date and time modified. Work item news feed entries will include the work item type, elapsed time since the item was modified, and a history entry.

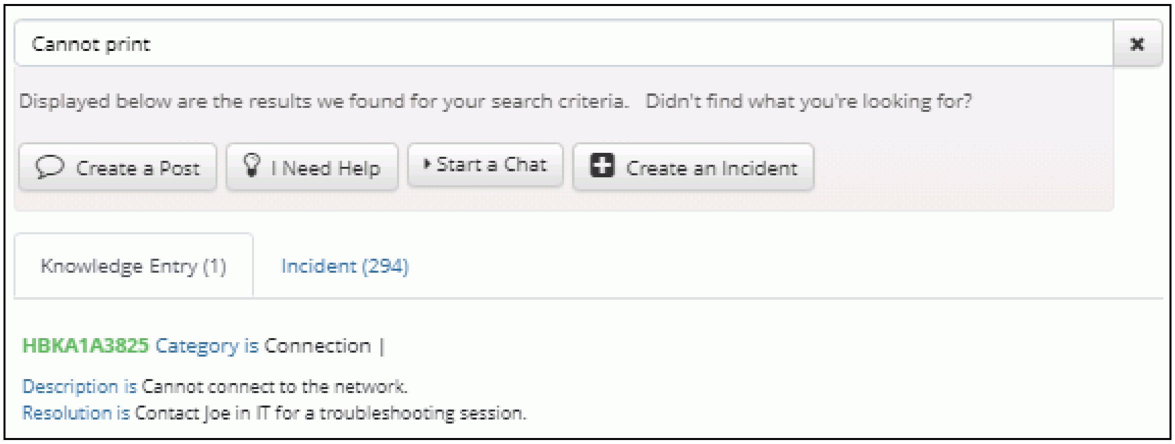
The following settings are applicable in Options; click Edit in the **Required Settings in Options** field to review or modify these settings.

- The One Field Per Row in News Feed field in Basics/Global Search options
- The Update link, statuses to display, and history types to display in <*work item type*>/Display options

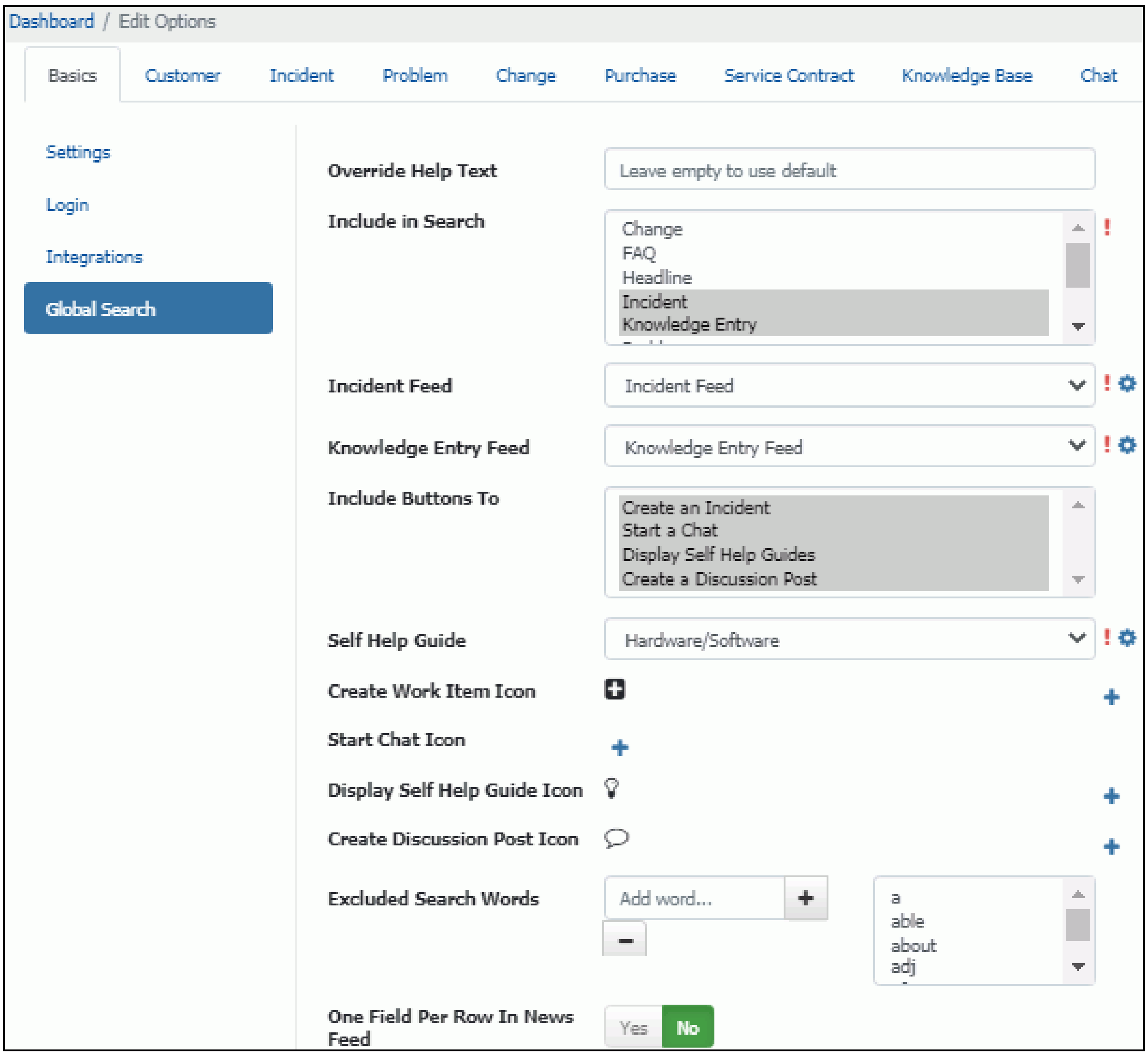
If including discussion posts, posts from all shared-access news feeds (those that do not restrict customer access) will be included. Support representatives configure discussion feeds on Desktop dashboards; if configured, authenticated customers can create discussion posts for a news feed by entering text in the search bar and clicking the Discussion Post link, by clicking the Create Discussion Post button in the mySupport portal Knowledge screen, or by clicking the Create a Discussion Post link when viewing a discussion feed. Discussion posts can be viewed and managed via the Discussion Post Management screen.

Global Search

The Global Search component includes a search bar for entering an issue description, search text, question, or discussion post. While the text is entered a keyword search will be performed; all searches will be based on all fields configured for work item display. A list of words excluded in the search is configured in the Basics/Global Search section in the Options screen; this list will be utilized after two words are entered. If a phrase is entered in quotes, the text within the quotes will be used in the search. Results will appear below the search bar; if configured, links will appear for creating an incident, displaying a self help guide (the link will appear by default as "I Need Help"), start a chat, and/or creating a discussion post.



Applicable settings in the Basics/Global Search section in the Options screen:



Override Help Text - Enter the text to appear in the search bar (instead of the default text). This text will override any text configured via the Resource Editor; see "Using the Resource Editor to Customize a mySupport Portal" on page 123.

Include in Search/Feed - Select the types of items to include in the search conducted after text is entered in the search bar: Change, FAQ, Headline, Incident, Knowledge Entry, Problem, Purchase, or Discussion Post. The Feed field will appear for each; select a predefined feed for displaying the records in the search result or select Configure to create or edit a feed.

Include Buttons To - Select the buttons to appear after an entry in the search bar, and then select the icon to precede each button.

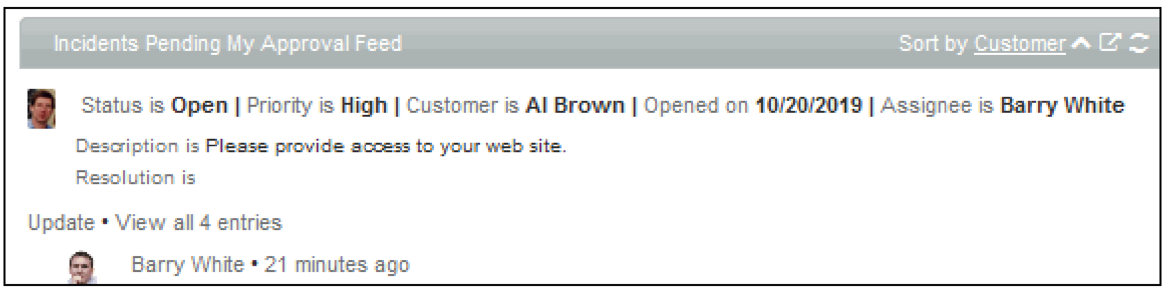
- Create a Discussion Post - This button displays a dialog for entering a discussion post to any of the shared discussion-only feeds (those that do not restrict customer access) created by support representatives.
- Create an Incident - This button displays the Incident Submit screen.
- Display Self Help Guides - This button displays a self help guide; select a defined self help guide or select Configure to create or edit one. See “Self Help Guide” on page 111 for configuration information.
- Start a Chat - Opens a chat dialog with the contents of the search. Use the Start Chat Icon field to select the icon to precede the Start Chat button that may appear after an entry in the search field. See “Chat” on page 34 for more information.

Excluded Search Words - Enter the words to be excluded when a search is performed.

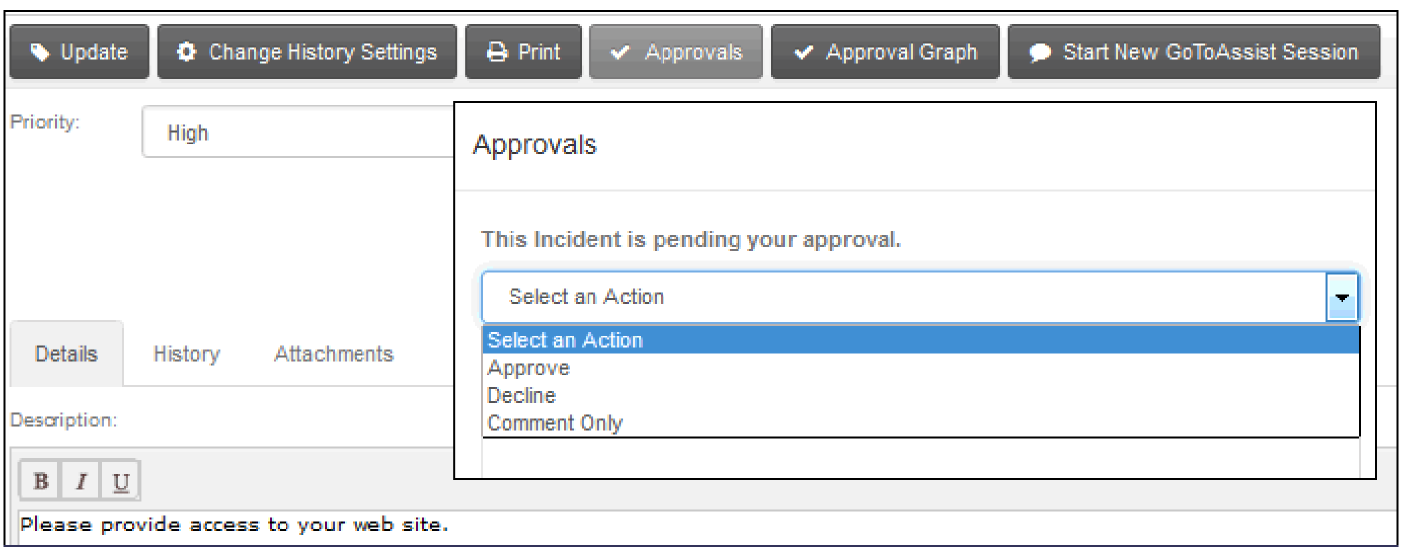
One Field Per Row In News Feed - Select Yes to display fields on news feed entries individually per row.

Incidents/Changes/Purchase Requests Pending My Approval

This feature displays in a feed the incidents, changes, and purchase requests that are pending approval by the logged-in customer.



The customer can click on a work item to open and approve it.



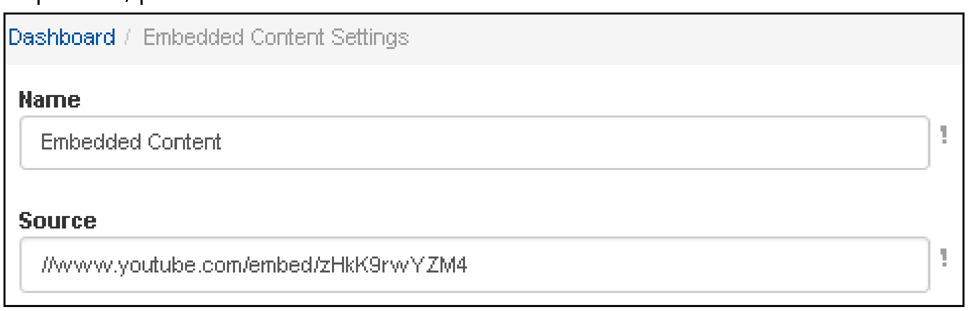
This feature uses Feed settings which you can create or edit via the Configure option; see “Work Item Feeds” on page 90 for more information. It also uses the display layout settings in Options for displaying an individual work item; click Edit in the **Required Settings in Options** field to review or modify these settings. See “Display Settings” on page 70 for more information.

Informational Elements

Embedded Content

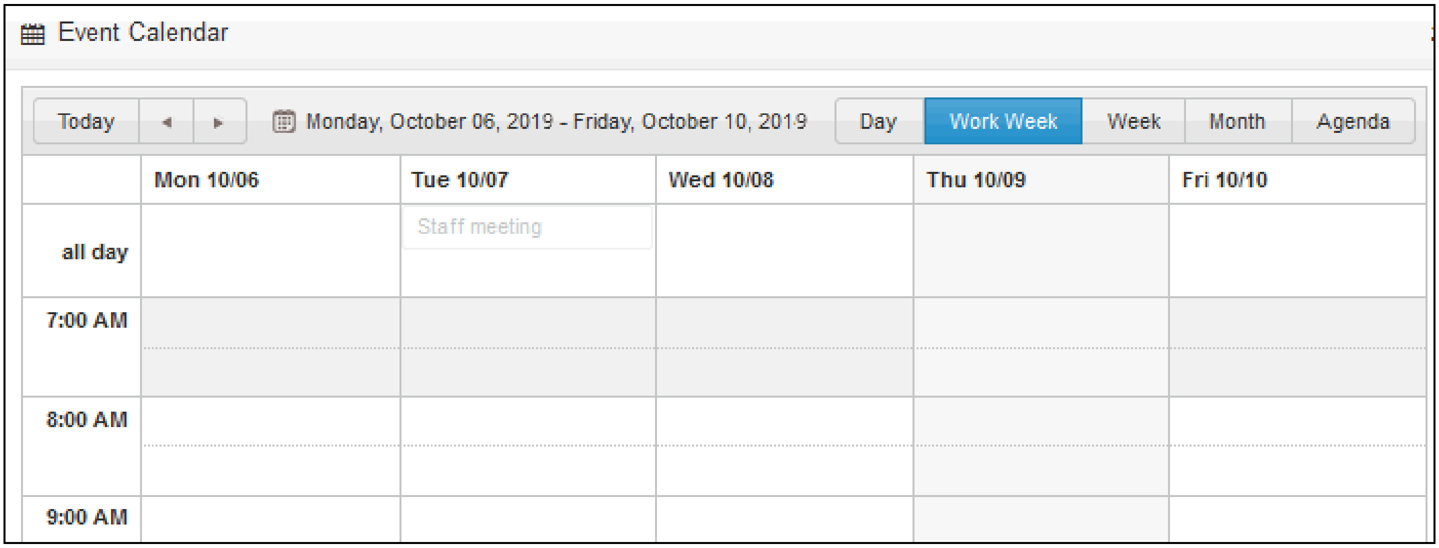
Use the Embedded Content component to display HTML content such as a web site or YouTube video.

To configure this component, paste the URL or embed code for the content into the Source field.

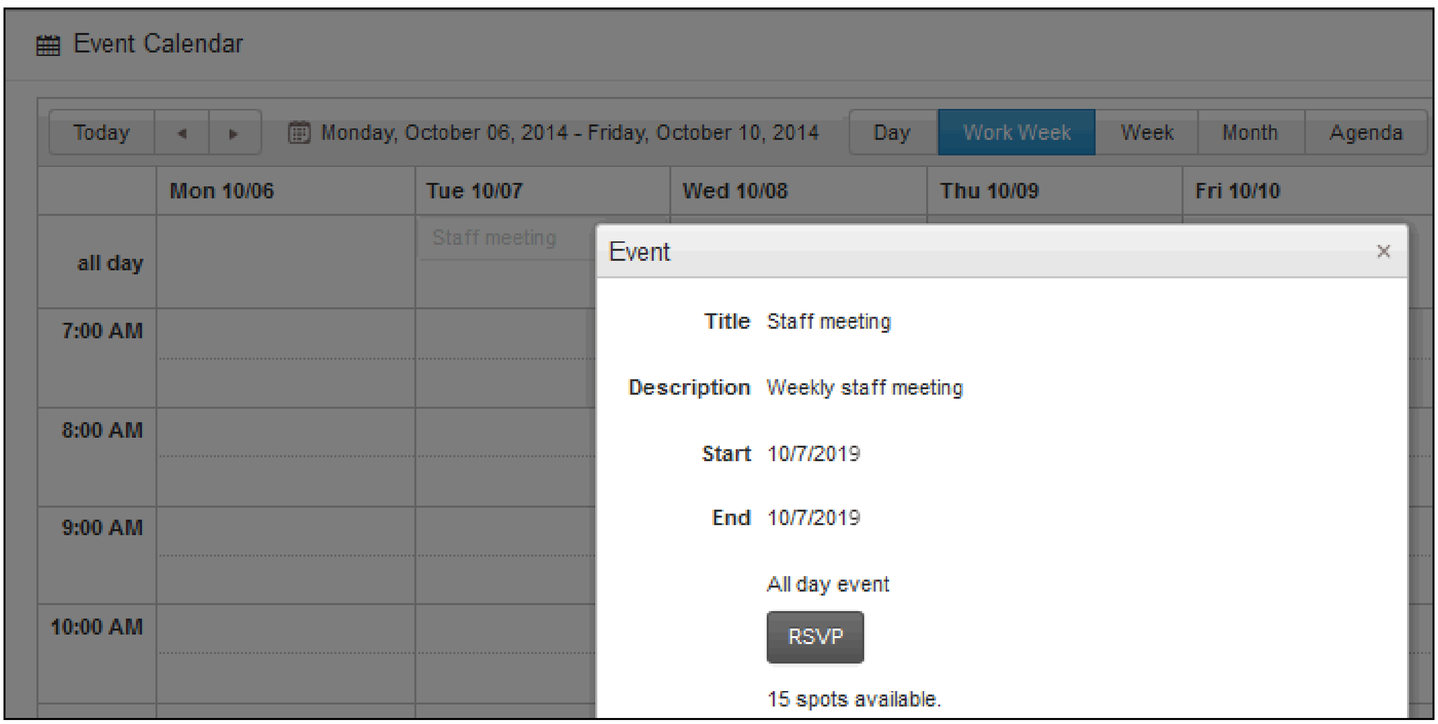


Event Calendar

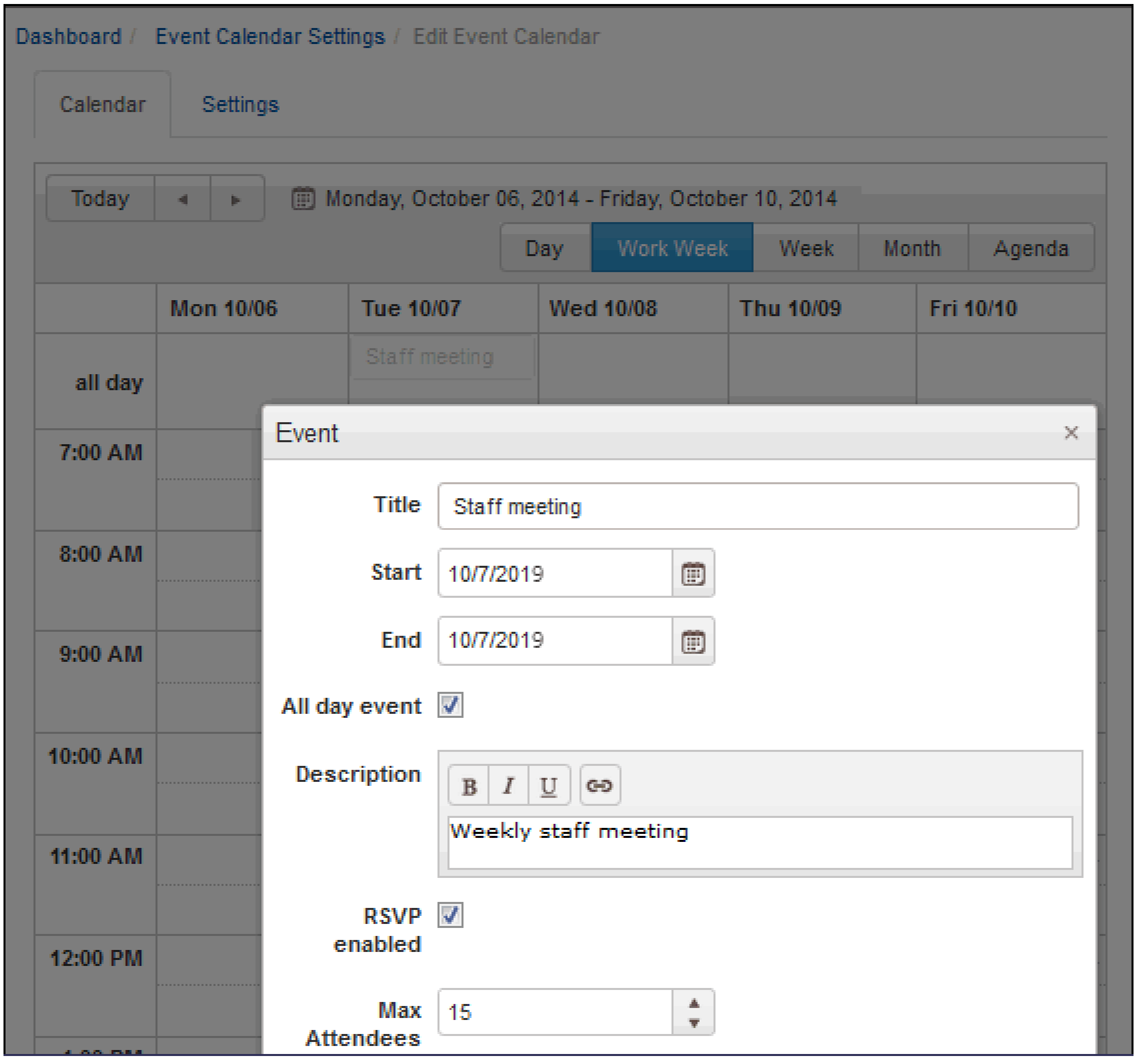
Use event calendars to schedule meetings and other events for display in mySupport and Desktop components. You can enable RSVPs and specify a maximum number of attendees, and support representatives can use event calendars on the Desktop. Note that customers should set their time zone via Account Settings; the time zone of the server will be used by default on the Event Calendar.



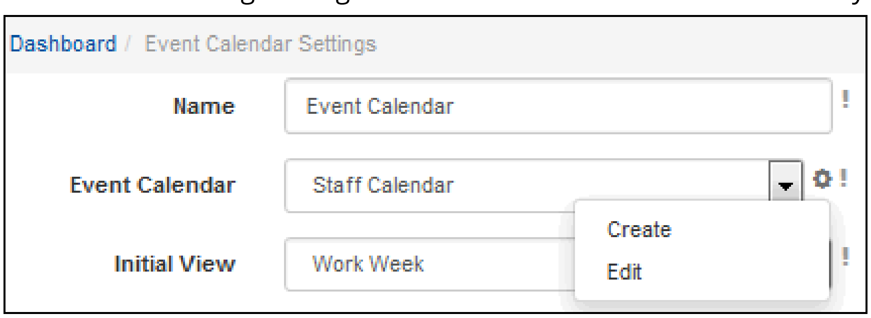
Customers can double-click on a meeting to display details. If the RSVP feature is enabled for a meeting and the maximum number of attendees has not been reached, the RSVP button will appear.



You can double-click on a time cell in the Calendar Settings screen to create an appointment.

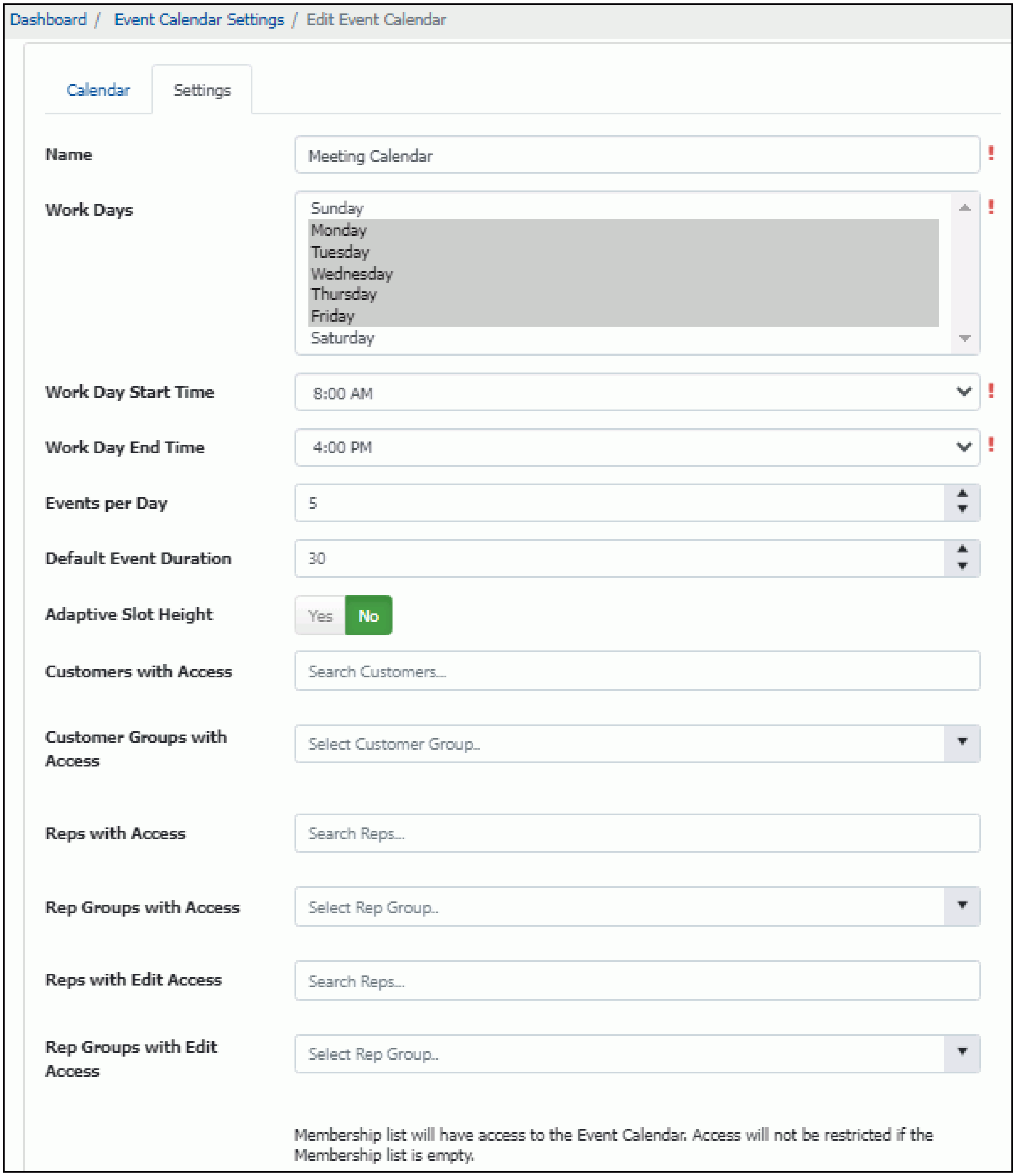


Select Configure in the Calendar Settings dialog to create a new event calendar or modify an existing one.



Note that you can also configure event calendars via the Options and Tools | Customize | Event Calendars screen.

Use Settings tab to designate access and display settings; note that if an access field is left blank, no restrictions will be in effect.



Work Days - Select the days of the week to display by default on the calendar; the dropdown in the upper right corner of the calendar can change this display.

Work Day Start Time/End Time - Select the start and end times to display on the calendar for each day.

Events Per Day - Select the number of events to display by default.

Default Event Duration - Enter the default number of minutes to display when creating an appointment.

Adaptive Slot Height - Select Yes to change the height of cells of the calendar when the component size changes.

Customers With Access - Start typing in this field to display a dropdown for designating those that can view the calendar.

Customer Groups With Access - Select the customer groups that can view the calendar.

Reps With Access - Start typing in this field to display a dropdown for designating the support representatives that can view the calendar.

Rep Groups With Access - Select the support representative groups whose members can view the calendar.

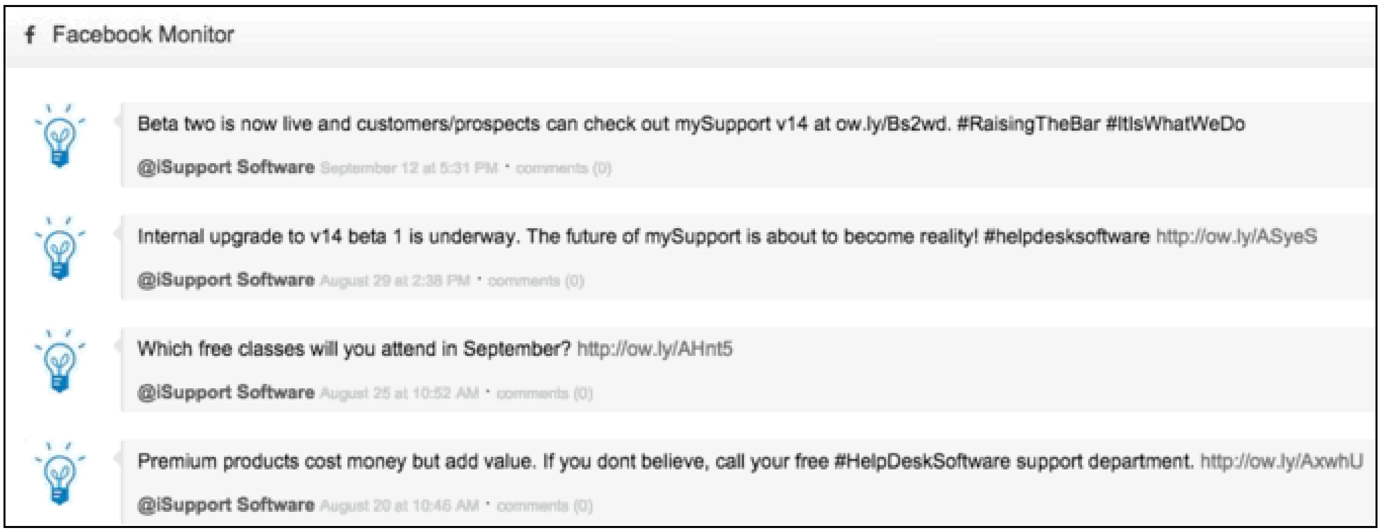
Reps With Edit Access - Start typing in this field to display a dropdown for designating the support representatives that can view the calendar and create and modify appointments.

Rep Groups With Edit Access - Select the support representative groups whose members can view the calendar and create and modify appointments.

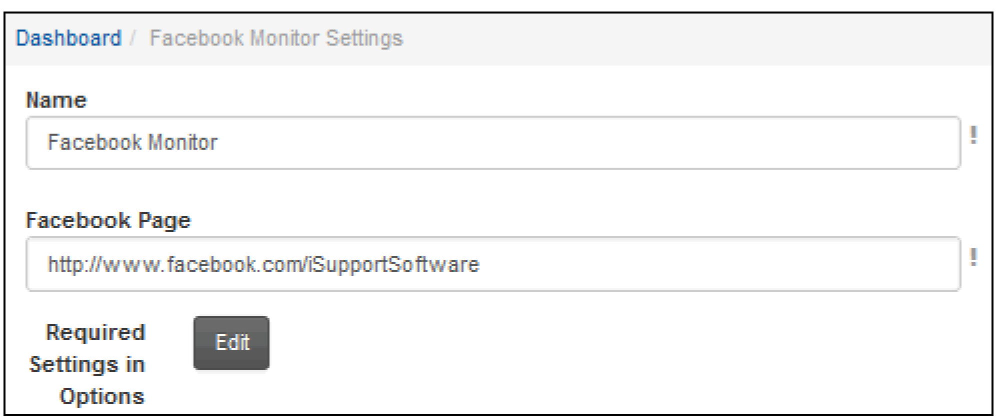
Note that once you create a calendar, it will be saved even if it is not used on a portal. See “Managing Portal Items” on page 122 for information on copying and deleting event calendars. Note that you can also create and edit calendars via the Event Calendars screen.

Facebook Monitor

The Facebook Monitor component monitors a Facebook page and displays posts and comments from it.



To configure this component, enter the Facebook domain in the **Facebook Page** field in the following format: http://www.facebook.com/<*domain*>



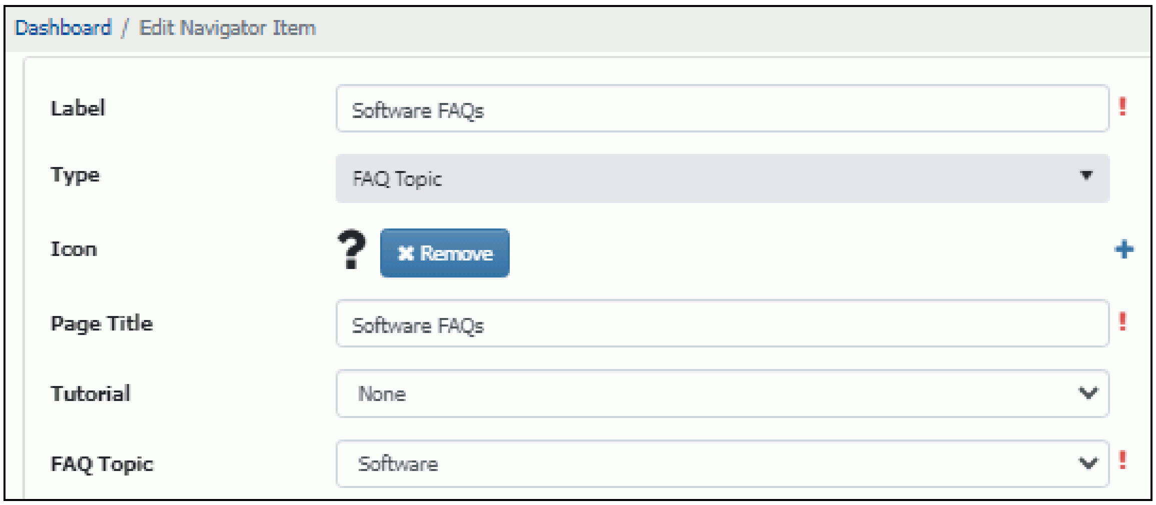
A Facebook application must be configured in iSupport in order to use the Facebook Monitor; click Edit in the **Required Settings in Options** field to display the Basics/Integrations screen in Options and select a preconfigured Facebook application.

FAQs

FAQs that are enabled for display to customers can be included on a portal via a navigator link, feed, or view in a component. If displaying headlines via a navigator link, select FAQs in the Type field.

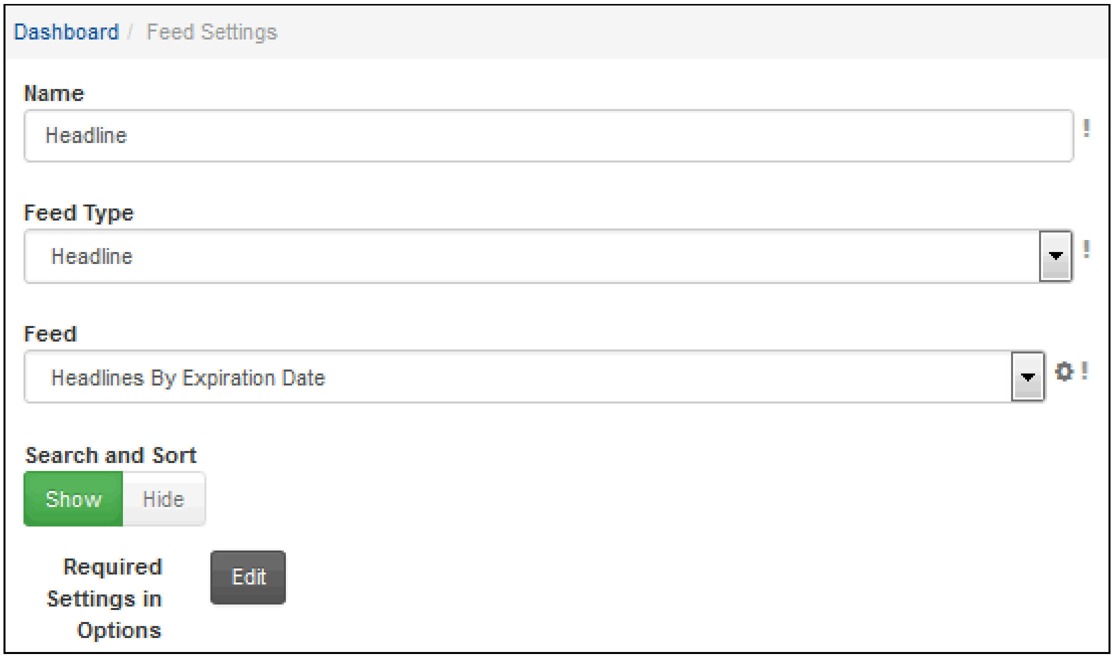
FAQ Topics

Use the FAQ Topic link type to display only the frequently asked questions for a specific FAQ topic.

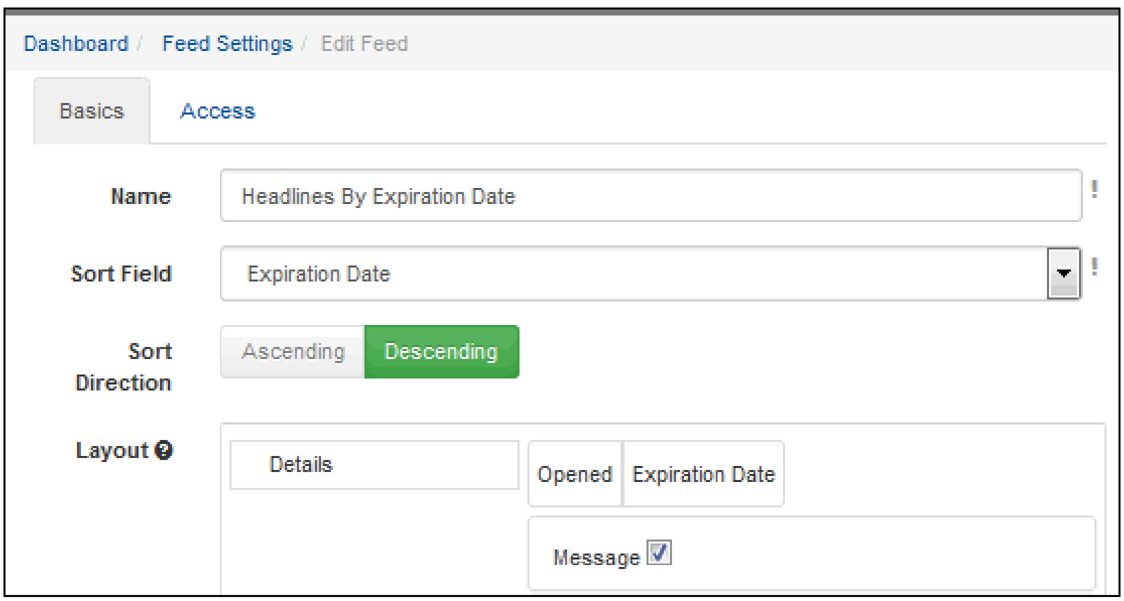


Headlines

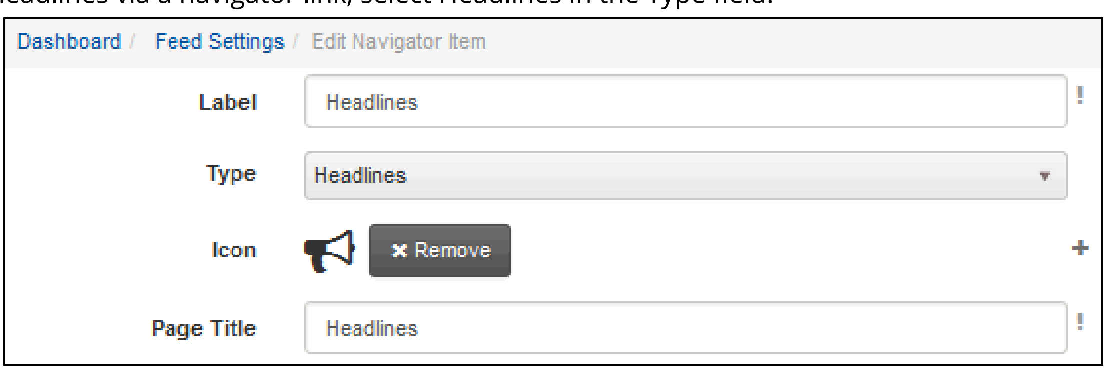
Headlines that are enabled for display to customers can be included on a portal via a navigator link, feed, or view in a component. If including headlines in a component, you'll select Headline as the feed type and enable searching and sorting.



Select Configure to specify layout and sort options.



If displaying headlines via a navigator link, select Headlines in the Type field.

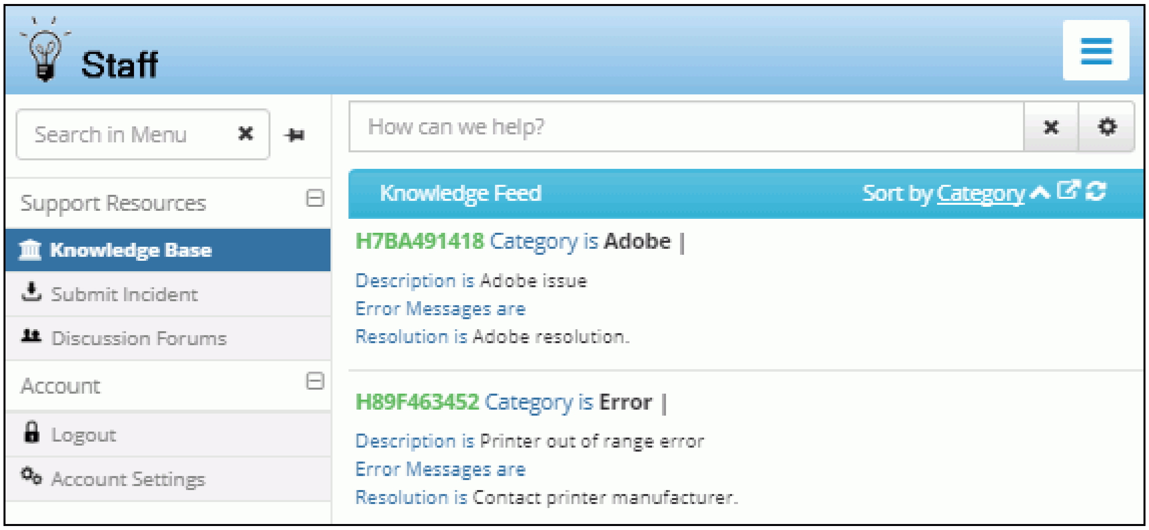


Note that support representatives can publish headlines to Twitter if Twitter integration is enabled.

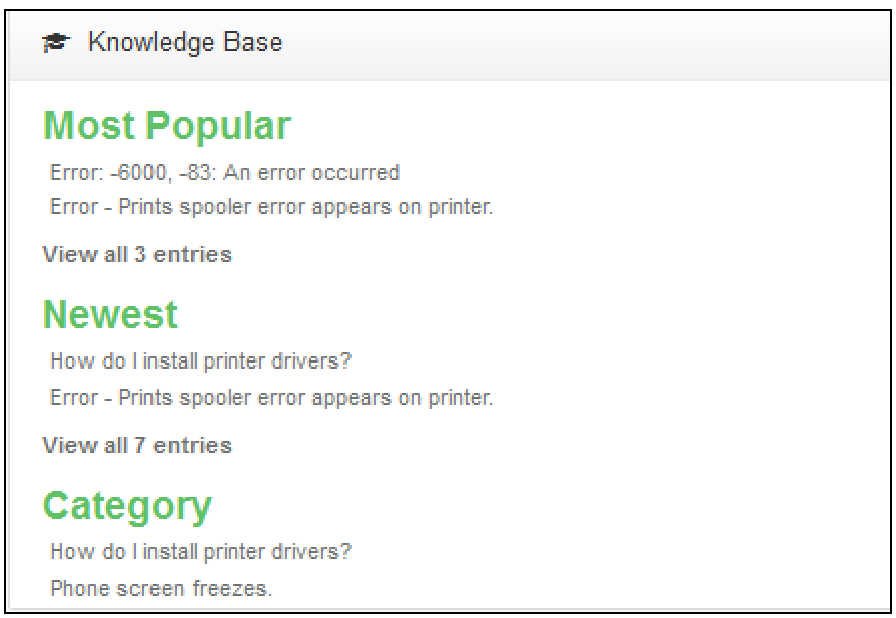
Knowledge Base

You can display knowledge information on mySupport in two ways:

- From a navigator link, you can display a full-screen feed of knowledge entries with a search bar at the top.

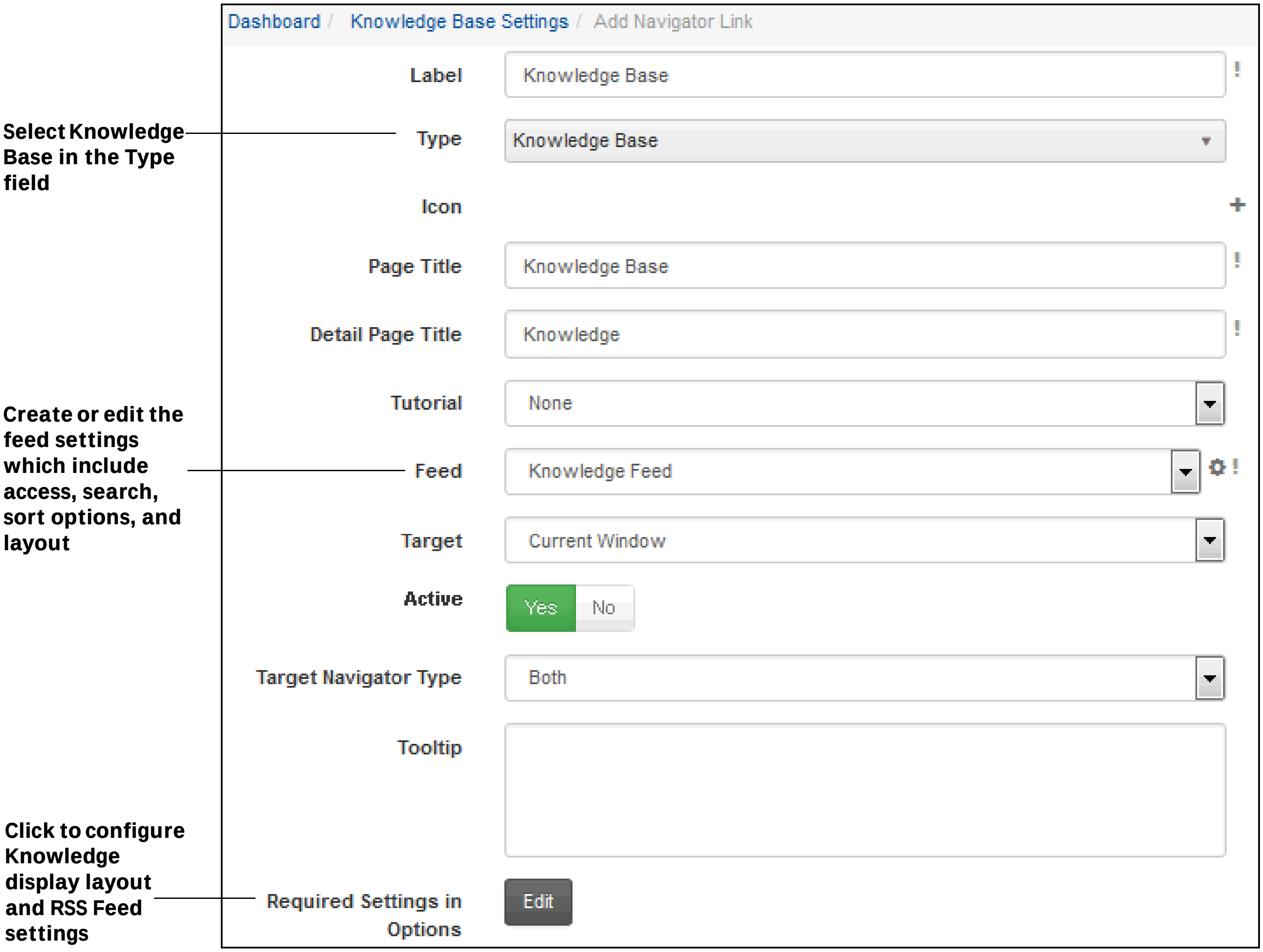


- In the Knowledge Base component, you can display knowledge entries in sections for Most Popular, Newest, and Category.

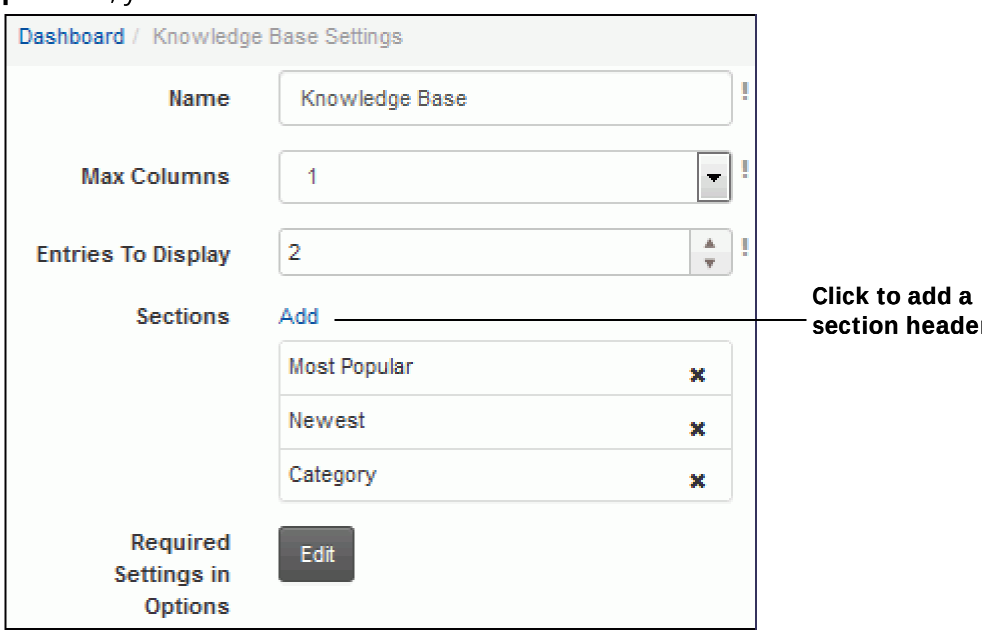


This feature uses the knowledge display layout and RSS Feed settings in Options; click Edit in the **Required Settings in Options** field to review or modify these settings. See "Configuring Knowledge Base Display and RSS Options" on page 77 for more information.

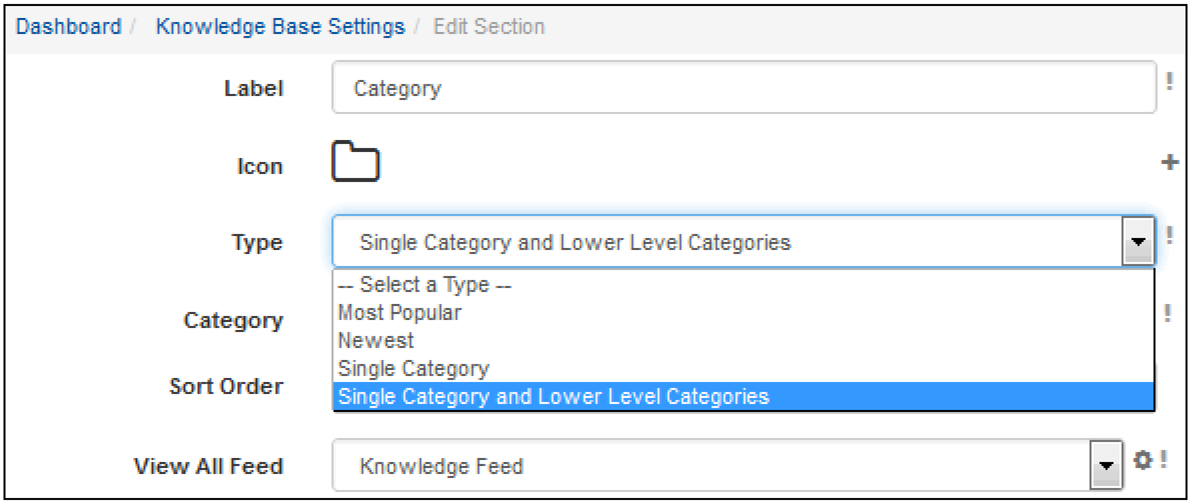
- **For navigator items,** you'll first use the Navigator Item screen to select Knowledge Base in the Type field, the feed, and other navigational options.



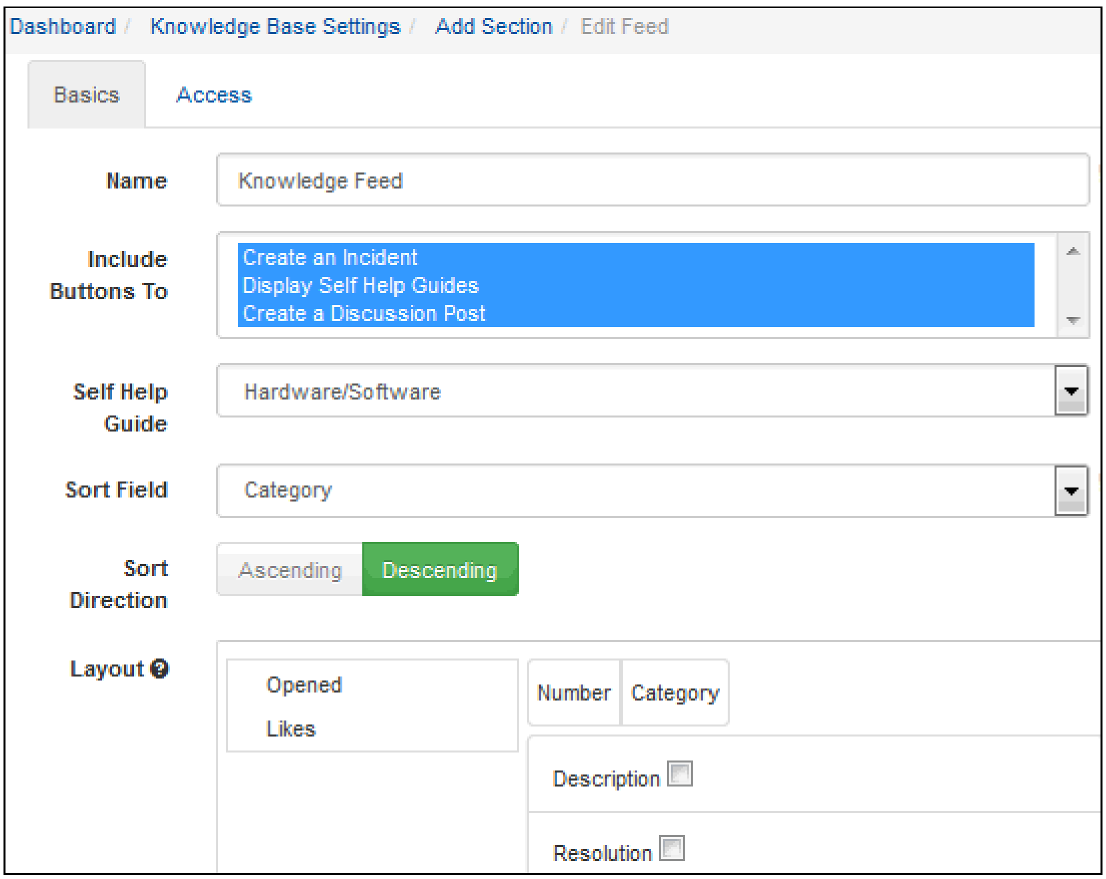
- For **components**, you'll need to include entries in one or more section. Click the Add link to add a section.



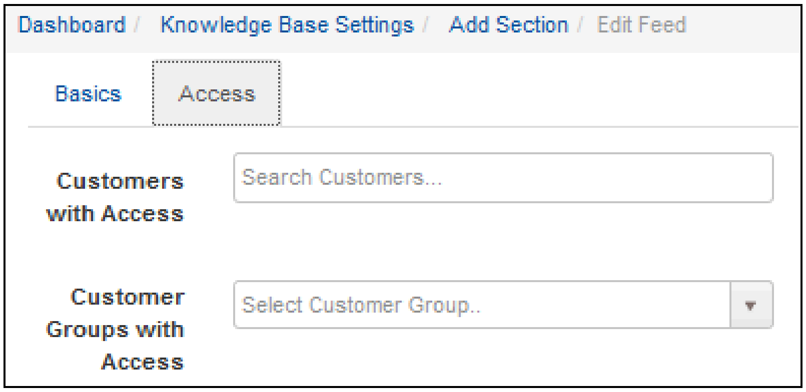
Click the Add link to enable the type of section, add an icon, and select or configure the feed in which results will appear. Use the View All Feed field to select or configure a feed that can be set to match the type of section (for example, you can configure a feed sorted by category to display when a user clicks the View All link in the Category section).



Select Configure next to the View All Feed field to design the feed layout and sort options for the entries that appear when the customer clicks the View All link in a section.



Use the Customers With Access and Customer Groups With Access fields on the Access tab to select the customers and customer groups that can view feed entries. If left blank, no restrictions will be in effect.



Login (Authentication)

Three types of access can be configured for a mySupport site; see "Configuring mySupport Portals" on page 46 for more information.

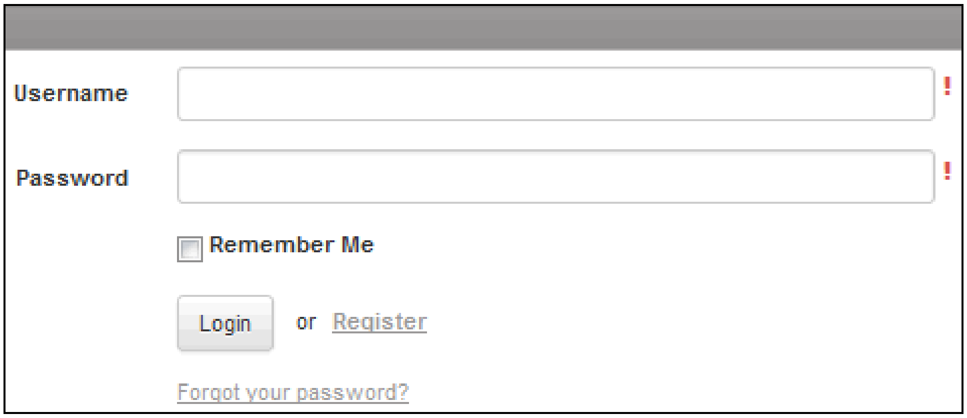
- No required authentication - customers can access all features but must enter a name and email address in order to submit or view incidents and changes; a Customer Profile record will be created after their first incident is submitted.
- Required authentication for the entire mySupport site; if customer or company groups have been created, access can be limited according to group.
- Required authentication for submitting and viewing incidents and changes and submitting a discussion post. If a customer has not logged in, the Reply and Create Discussion Post links will not appear and a login dialog will appear when the customer attempts to submit or view an incident or change.

A mySupport options set can be configured as Public Knowledge Only; it will only include a Knowledge page and no access settings will apply. See "Configuring Login and Password Options" on page 59 for more information.

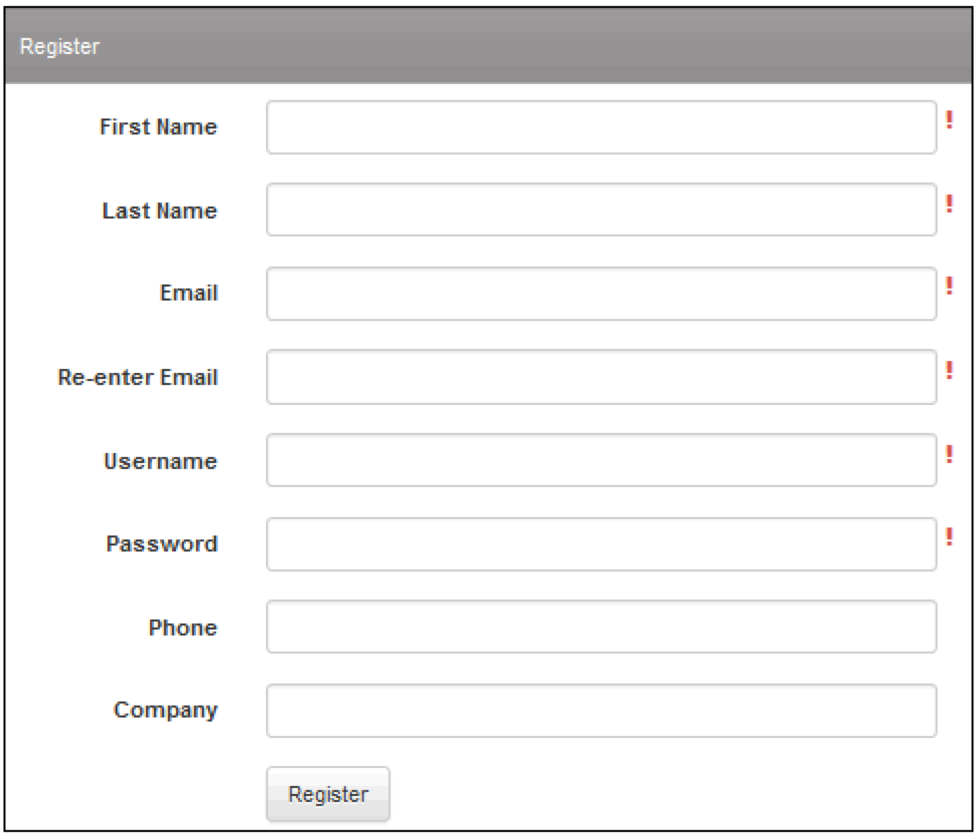
Authentication can be controlled via:

- Microsoft Authentication - if a customer has a Customer Profile record with a Microsoft® Windows user name (*domainname\username*), the login fields will not appear. See "Setting Up Microsoft Windows-Based Authentication for a mySupport Portal" on page 126 for more information.
- iSupport -
  - Authentication applications can be configured via the Social Media Integration screen; customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via Facebook or LinkedIn®; for example, if the customer is logged into Facebook, the customer will not need to enter an iSupport login.
  - A mySupport login can be included in each customer's Customer Profile record; access can be prevented by clearing this login. The mySupport portal login dialog can be configured to include a Remember Me option,

Register option, and/or Forgot Password option. (The Password field in the login dialog is case sensitive). See “Configuring Login and Password Options” on page 59 for more information.



- The **Register** option enables a customer to enter contact and login information; a Customer Profile record will be created after completion. A customer will not be able to register with the same email address and login name as another customer.

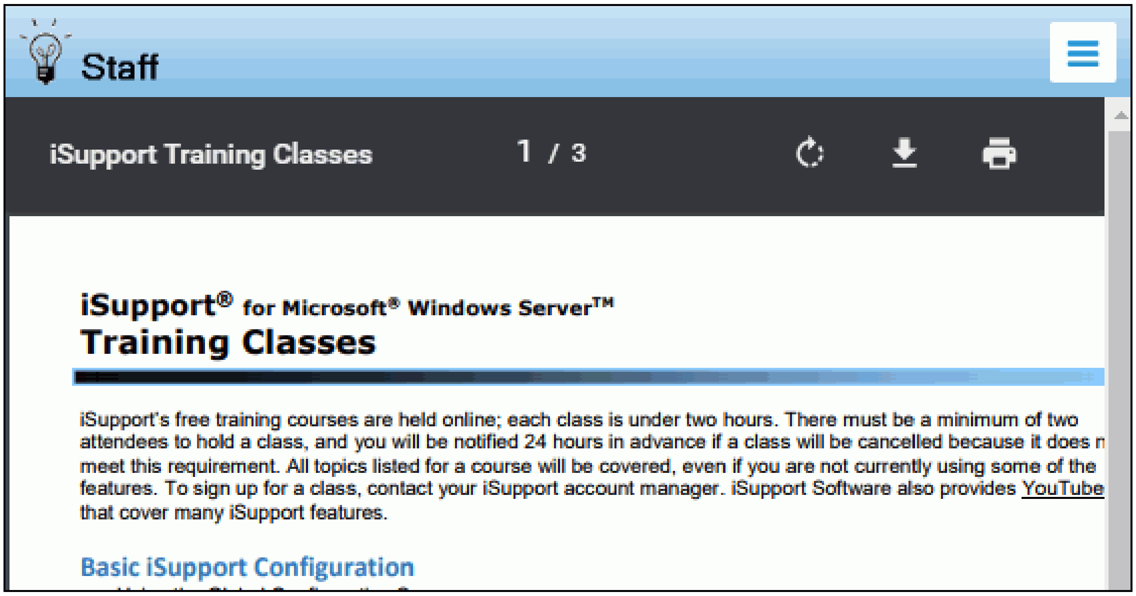


Registration review can be configured; it will disable mySupport access in the customer’s Profile record and create an incident via a template.

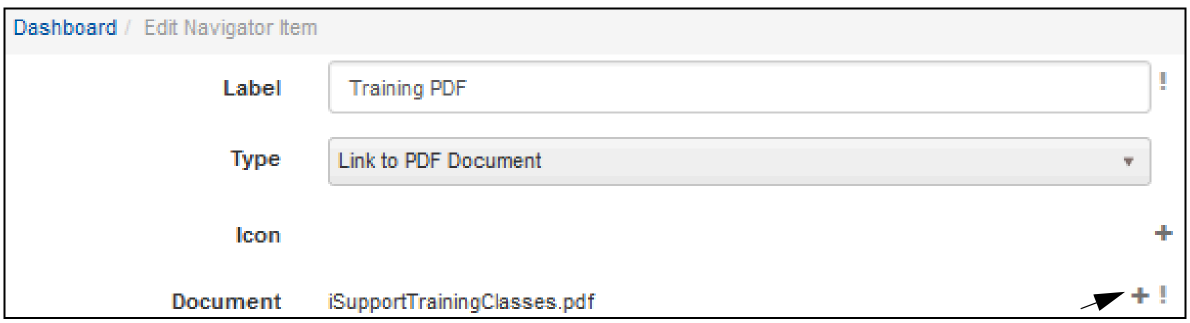
- The **Forgot Password** link in the Login dialog enables a customer to enter an email address to which an email will be sent with a login and a link for resetting their password. Note that a customer won’t be able to change their password if the source of their Customer Profile record is Active Directory, LDAP, or a relational database that is being synchronized with a mapped password.
- The **Remember Me** option places a cookie on the customer’s system.

Link to PDF

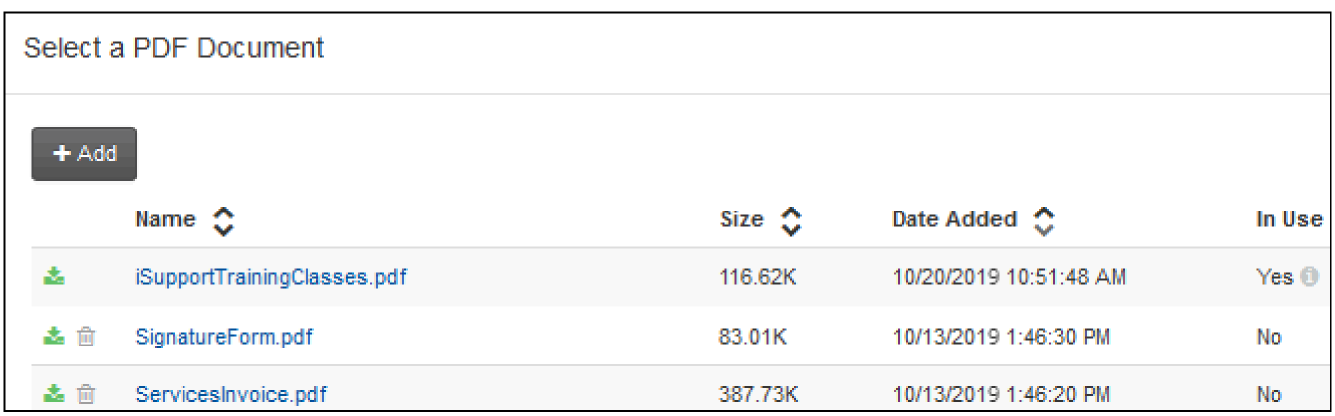
This feature displays a specified PDF in the PDF viewer associated with the customer's browser.



To configure this feature in the Edit Navigator Item screen, select the Link to PDF option in the Type field and then select the + option in the Document field to select the PDF.



The Select a PDF screen will appear; click the + Add button to select the PDF file. You can also delete PDFs added via this screen.

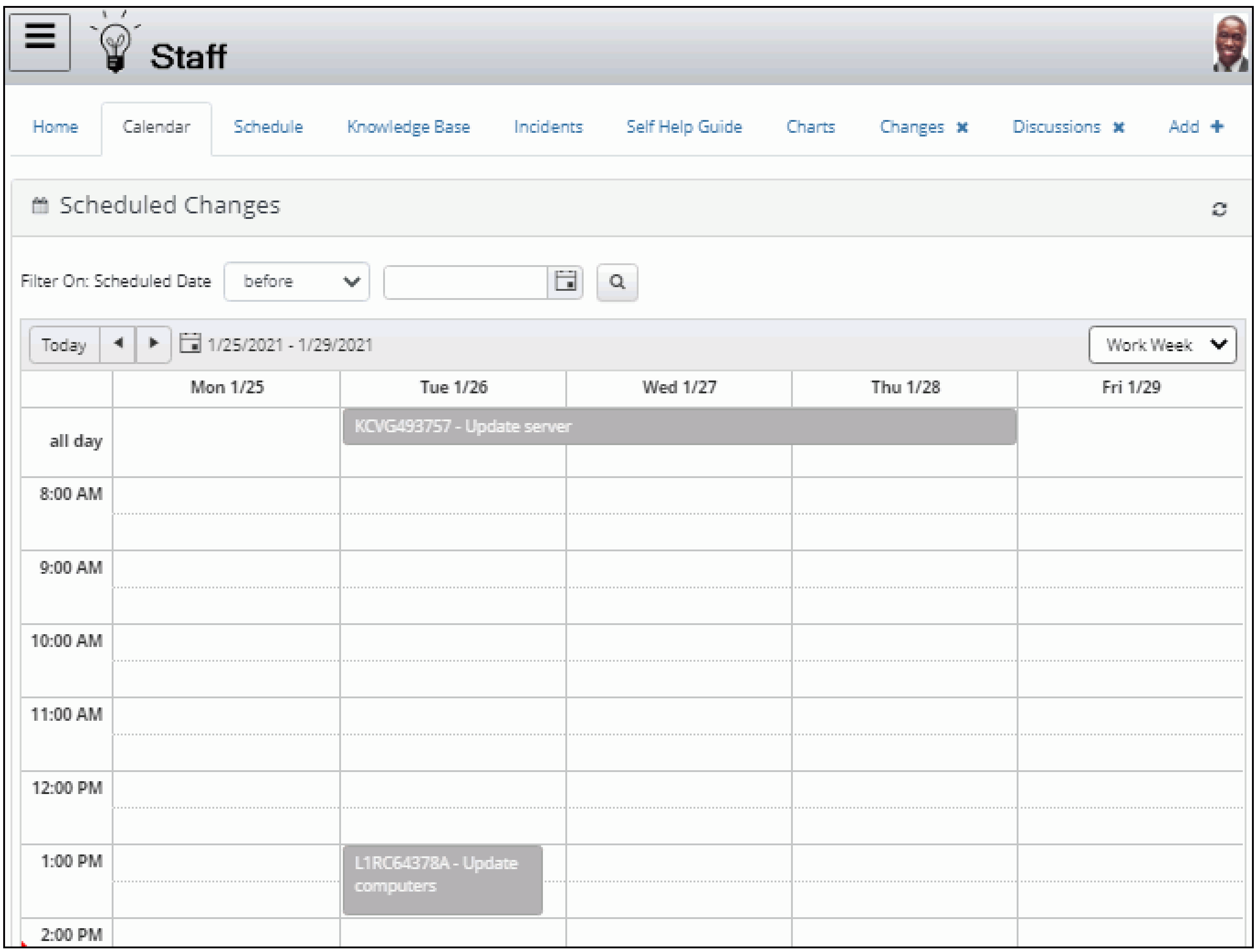


Rich Text Area

This feature enables entry of formatted text, images, and links in a component.

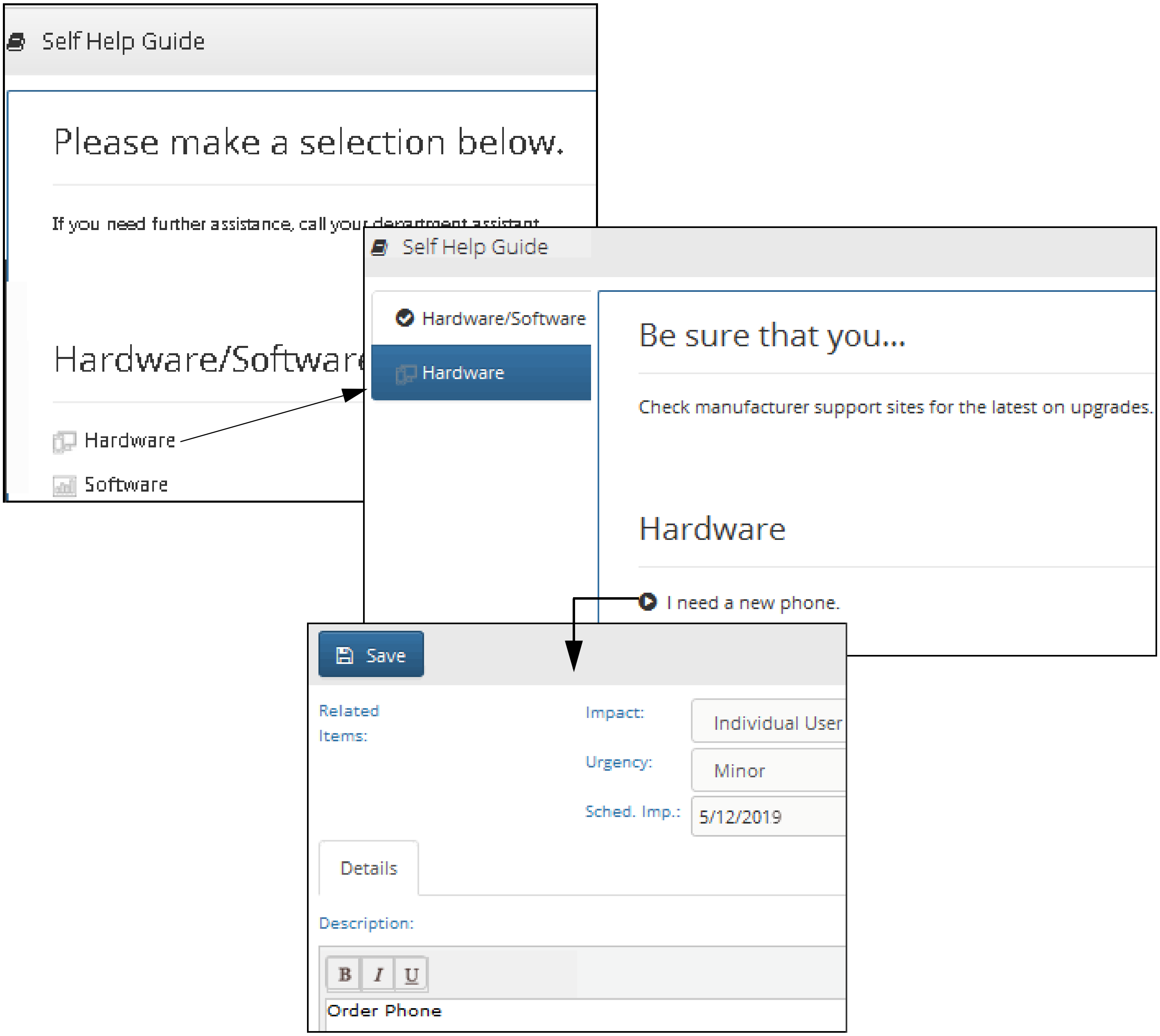
Scheduled Changes

Add a scheduled change calendar to a mySupport portal dashboard via the Event Calendar and Scheduled Changes Designer components in the mySupport Portal configuration screen. The calendar will only show changes that the logged in customer has mySupport permissions to view. When the customer clicks a listed event, the change will open with the mySupport change display layout linked with their associated mySupport options.

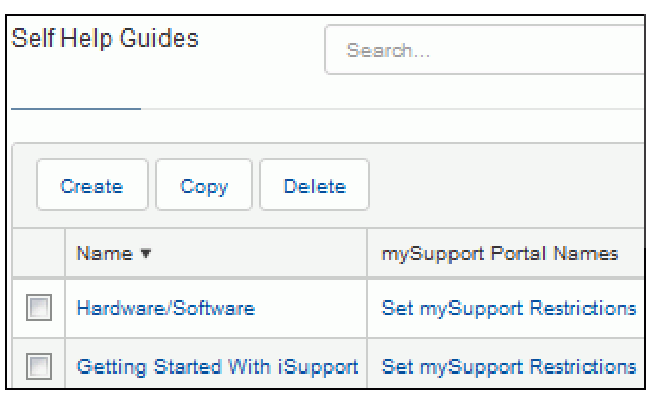


Self Help Guide

Self help guides contain decision tree-style prompts to lead a user to a template, FAQ, knowledge, or help topic. These guides can be accessed by clicking the link (labeled I Need Help by default) in the search bar; you can also include a link to one self help guide or all self help guides in the navigator.

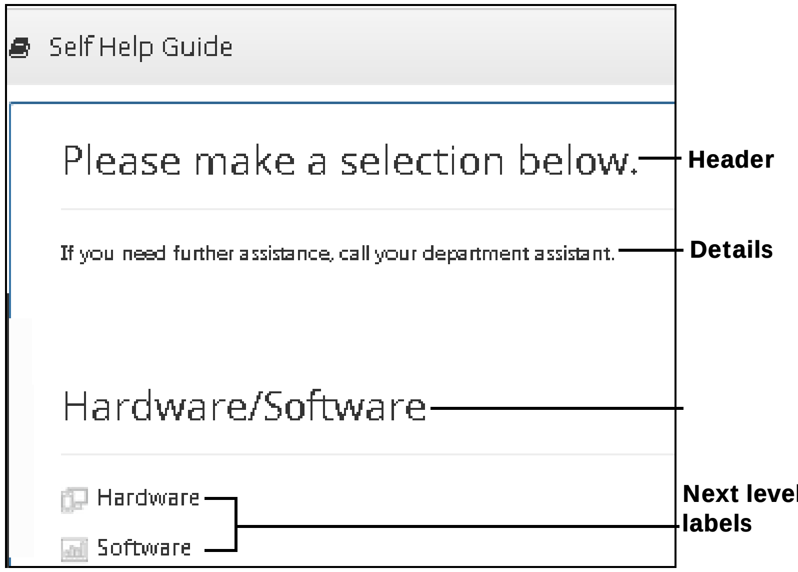


Use Create button in the Core Settings | mySupport | mySupport Self Help Guides screen to get started.

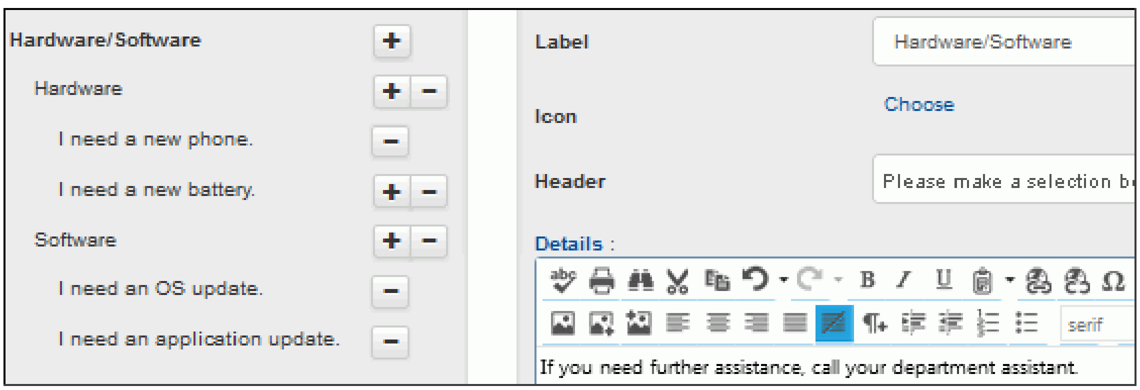


The elements of the initial display of a self help guide are shown below, along with the settings in the Self Help Guide configuration screen.

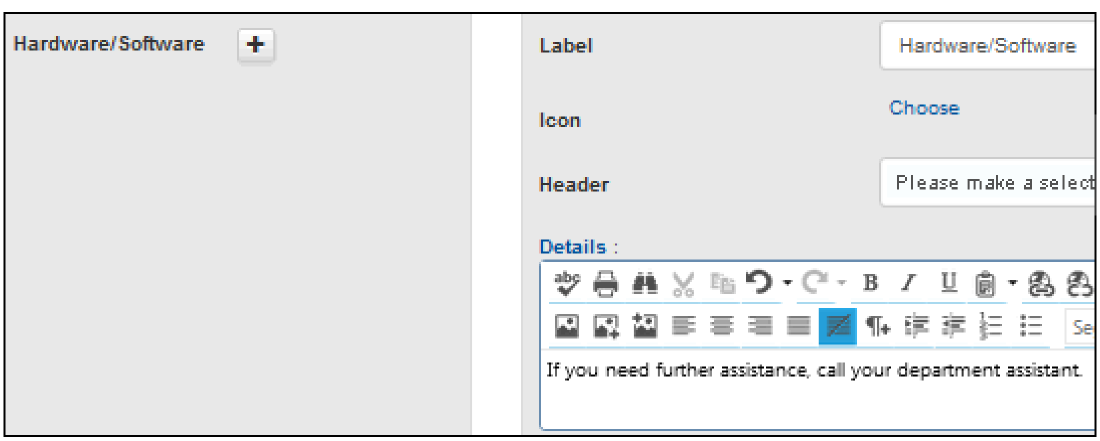
Self Help Guide on mySupport



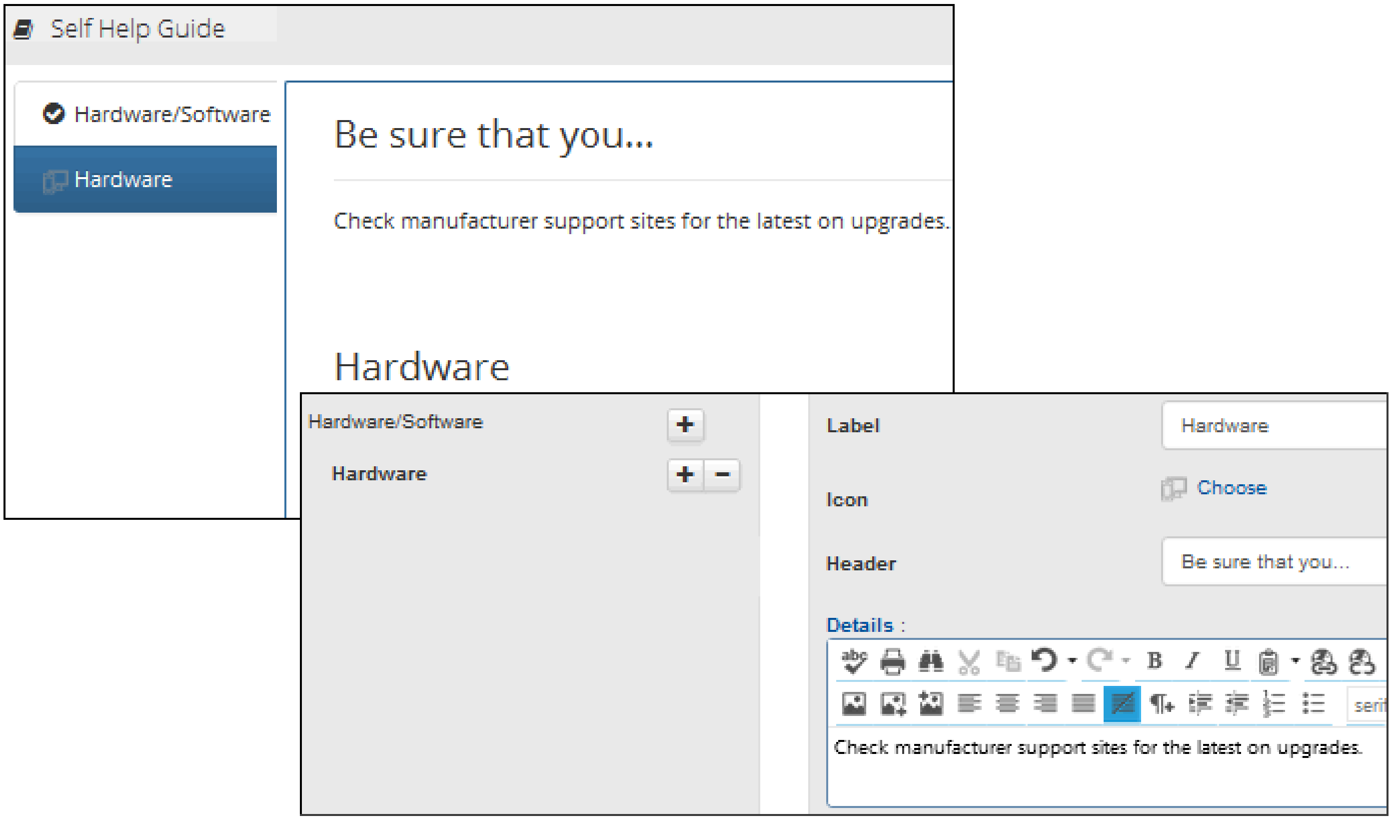
Self Help Guide Configuration Screen



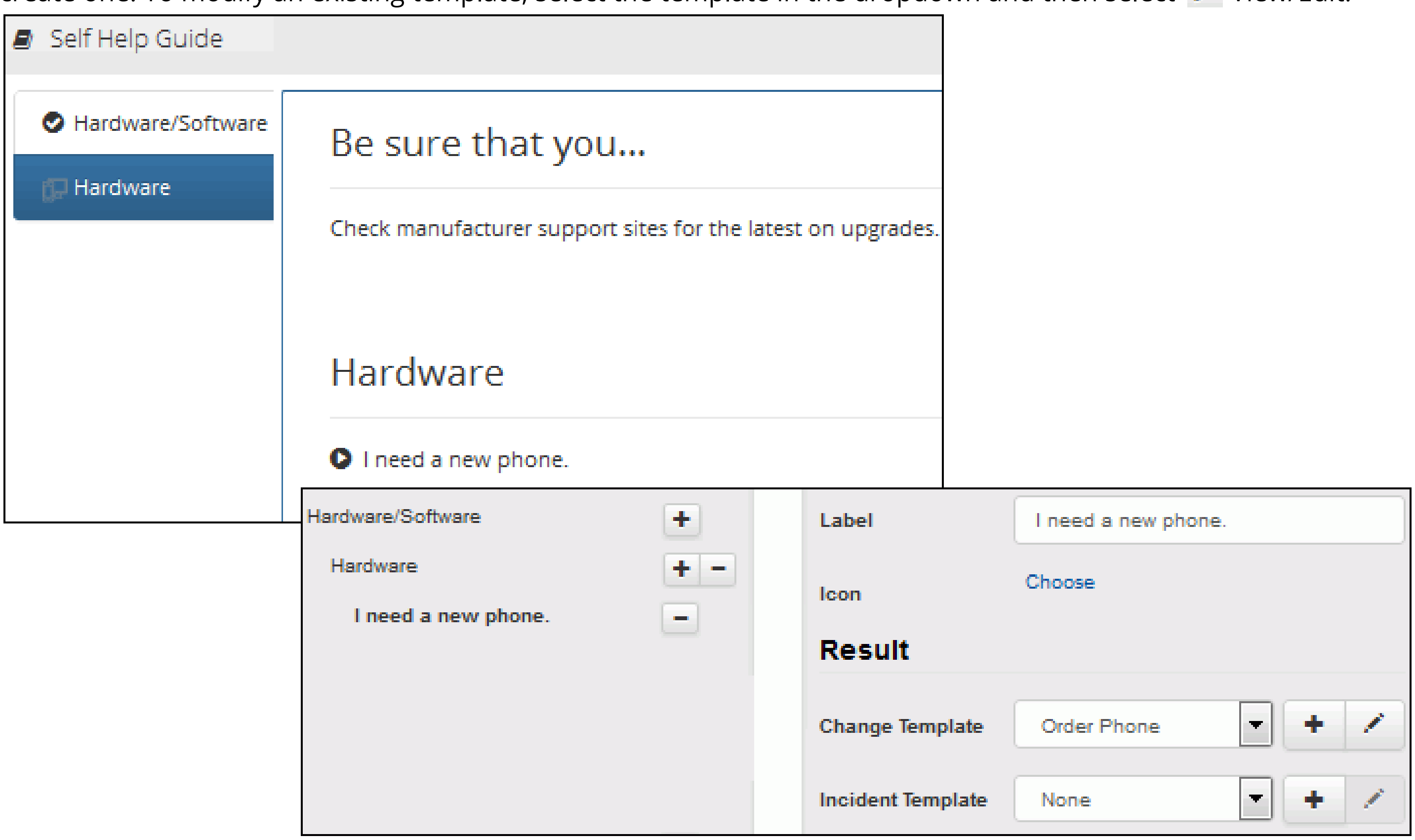
Start by entering text for the top level in the Label field (and in any other fields on the right) and click the Finish Edit button.



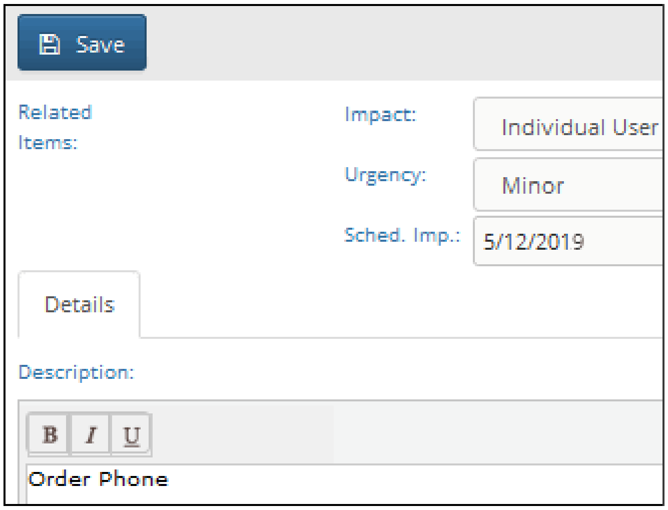
To create an entry on the next level, click the Add + link, complete the fields on the right, and then click the Finish Edit button.



At the final level you can enable the customer to create an incident, change, or purchase request, or you can display a knowledge entry or FAQ. In the Results section, select the applicable template or item or select + Create New to create one. To modify an existing template, select the template in the dropdown and then select View/Edit.



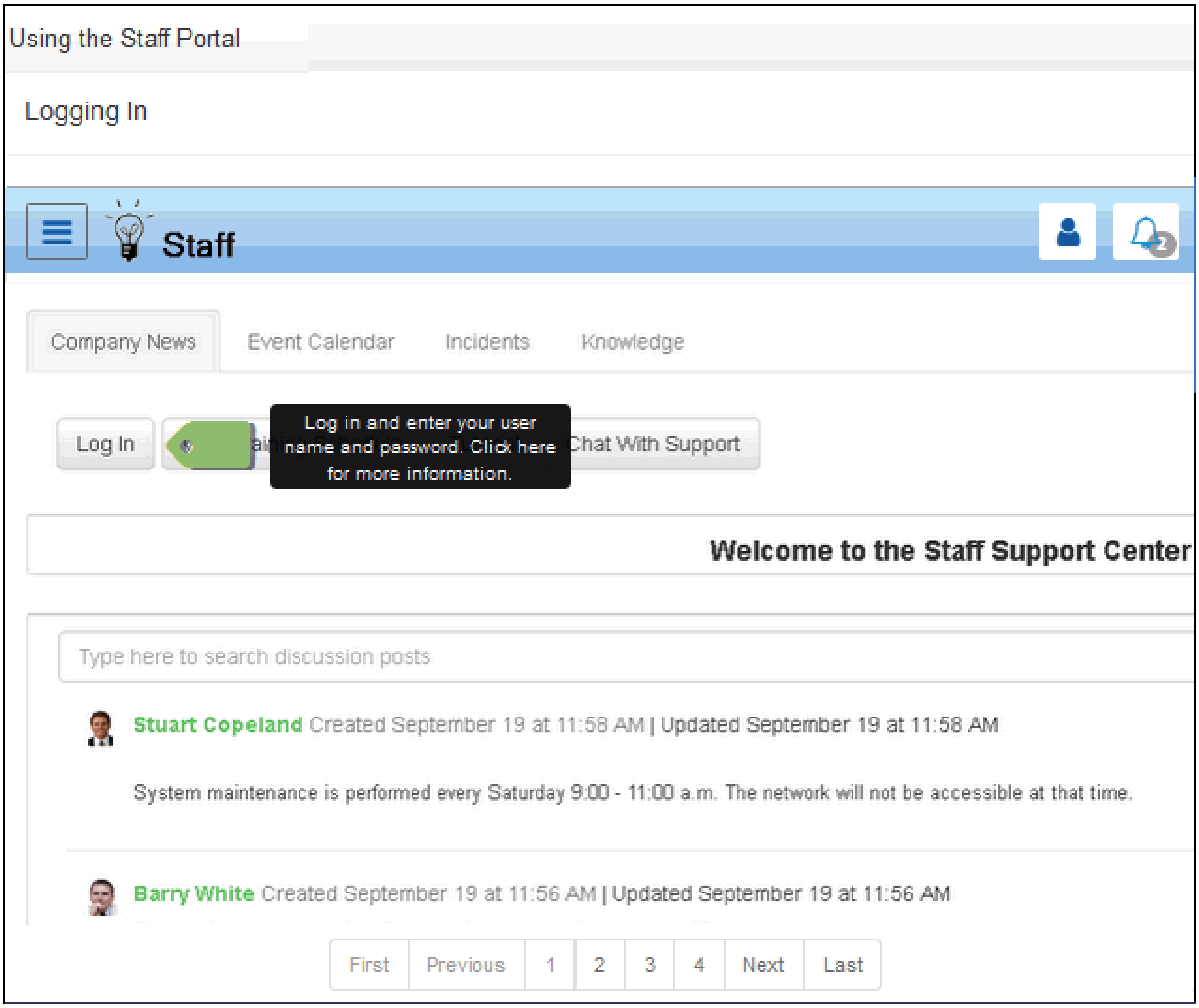
The applicable work item screen will appear with template-populated fields when the entry is selected.



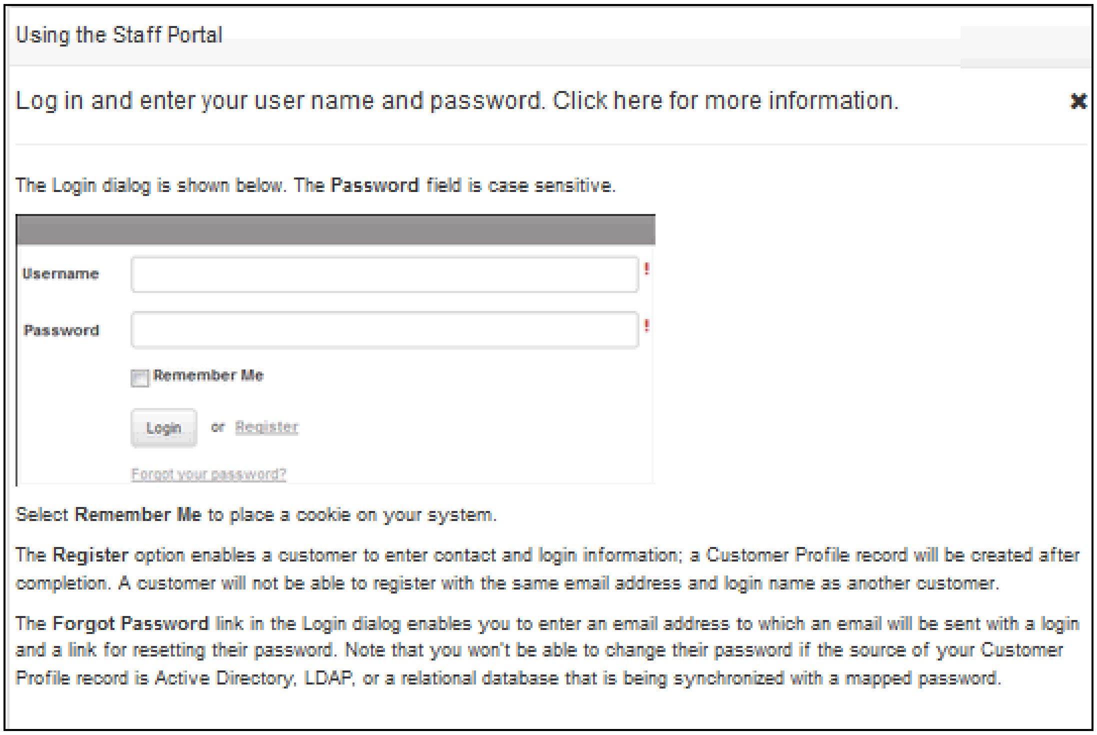
Use the Set mySupport Restrictions link on the Self Help Guides list screen to specify the mySupport portals on which a Self Help guide should appear.

Tutorials

Use tutorials to provide information to support representatives and customers. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content. Use the Options and Tools |Customize | Tutorials screen to create tutorials.

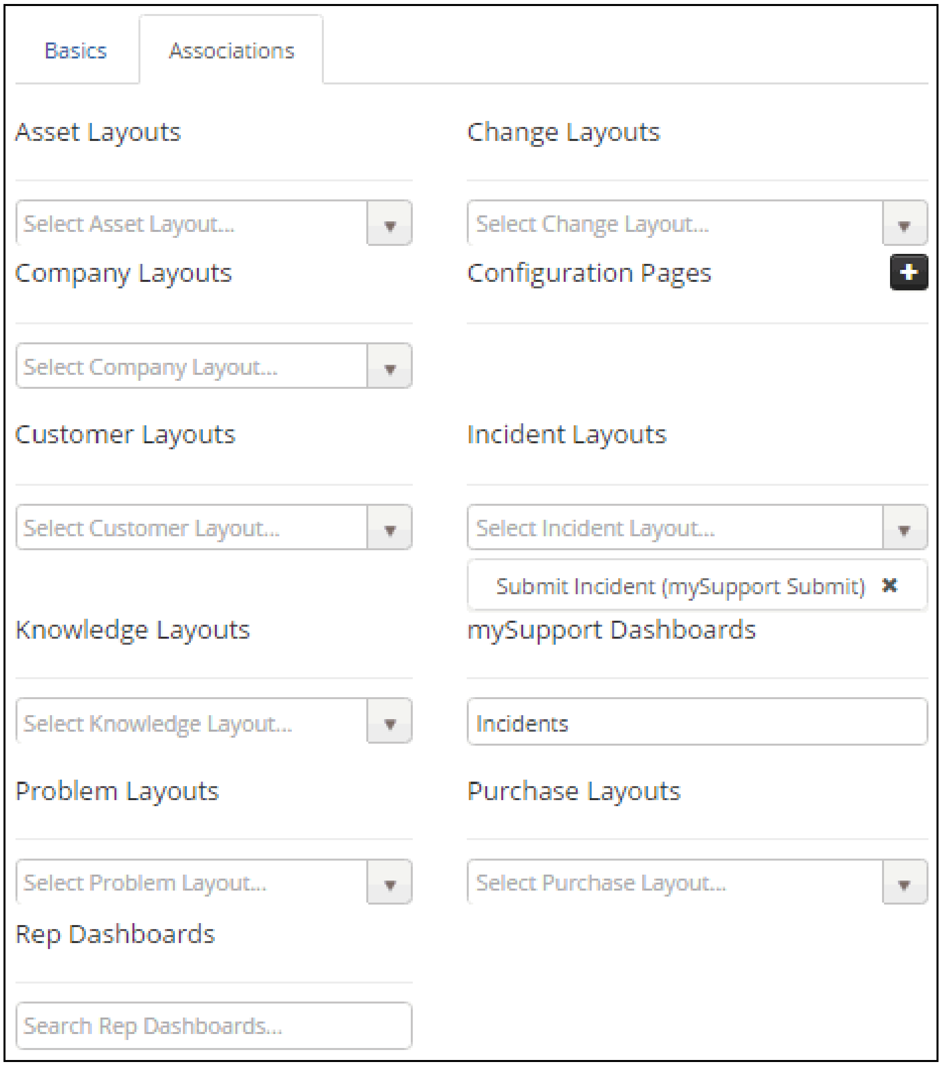


You can display images, videos, links, and formatted text in the screen that appears when a user clicks a tag.

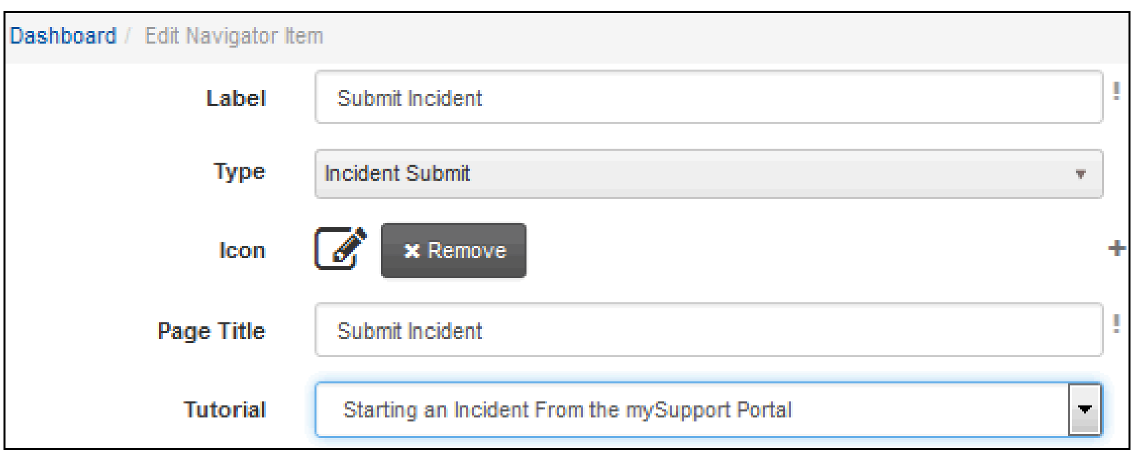


To display tutorials on mySupport, you can associate a tutorial with a navigator link or a button, a dashboard, or mySupport work item submit or display layout. Note that tutorials are not available for components.

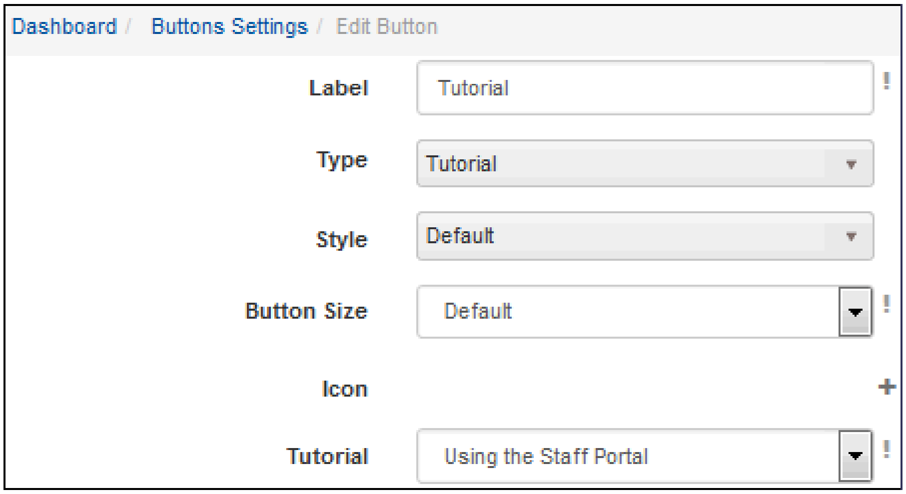
For dashboards, the tutorial will appear the first time the authenticated user accesses the dashboard; after that point the Tutorial option will appear in the upper right corner. Use the Associations tab in the Tutorials screen to link a tutorial to a mySupport dashboard or mySupport incident layout.



To associate a tutorial with a feature accessed via a navigator link or button in a component, select the tutorial in the Tutorial field in the Edit Navigator Item or Edit Button screen. The tutorial will appear once for each authenticated user, the first time the user accesses the feature.

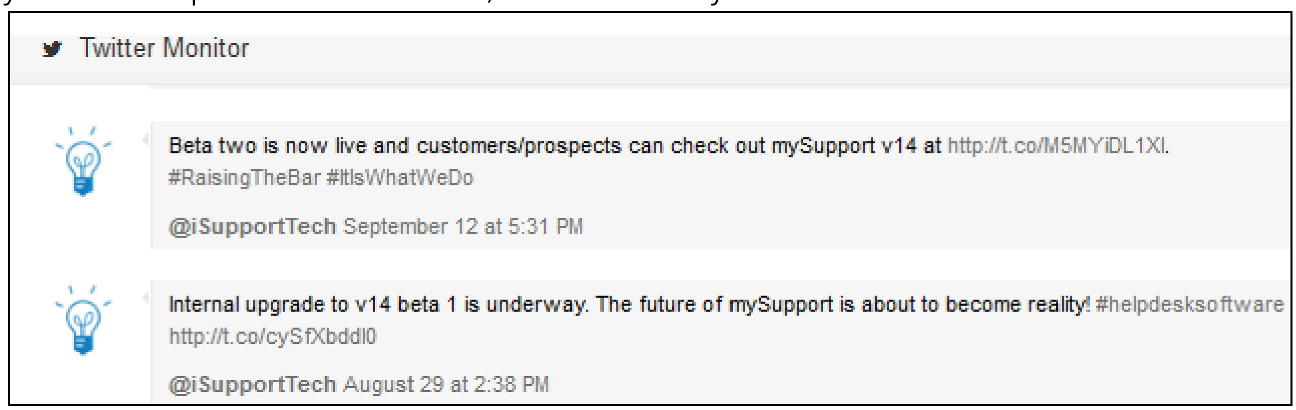


To directly link a tutorial to a button or navigator link and display the tutorial every time the button or link is clicked, select Tutorial in the Type field and then select the tutorial in the Tutorial field.



Twitter Monitor

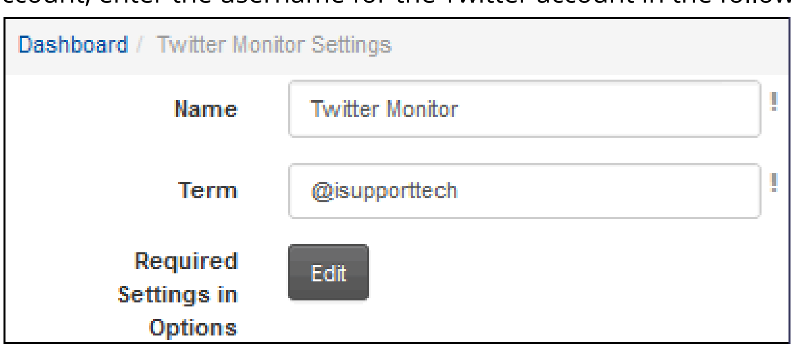
The Twitter Monitor component searches Twitter and displays tweets that include a specified search term, or it can display tweets for a specified Twitter account, for the last 90 days.



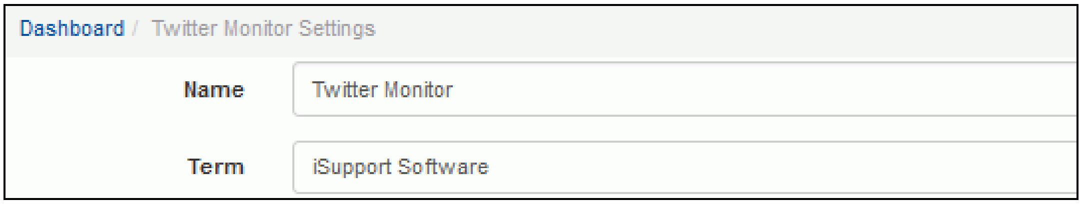
A Twitter account and application must be configured in iSupport in order to use the Twitter Monitor; click Edit in the **Required Settings in Options** field to display the Basics/Integrations screen in Options and select a preconfigured Twitter application. See "Configuring Integrations" on page 62.

To configure this component, enter the following in the **Term** field:

- To monitor a Twitter account, enter the username for the Twitter account in the following format: @<*username*>



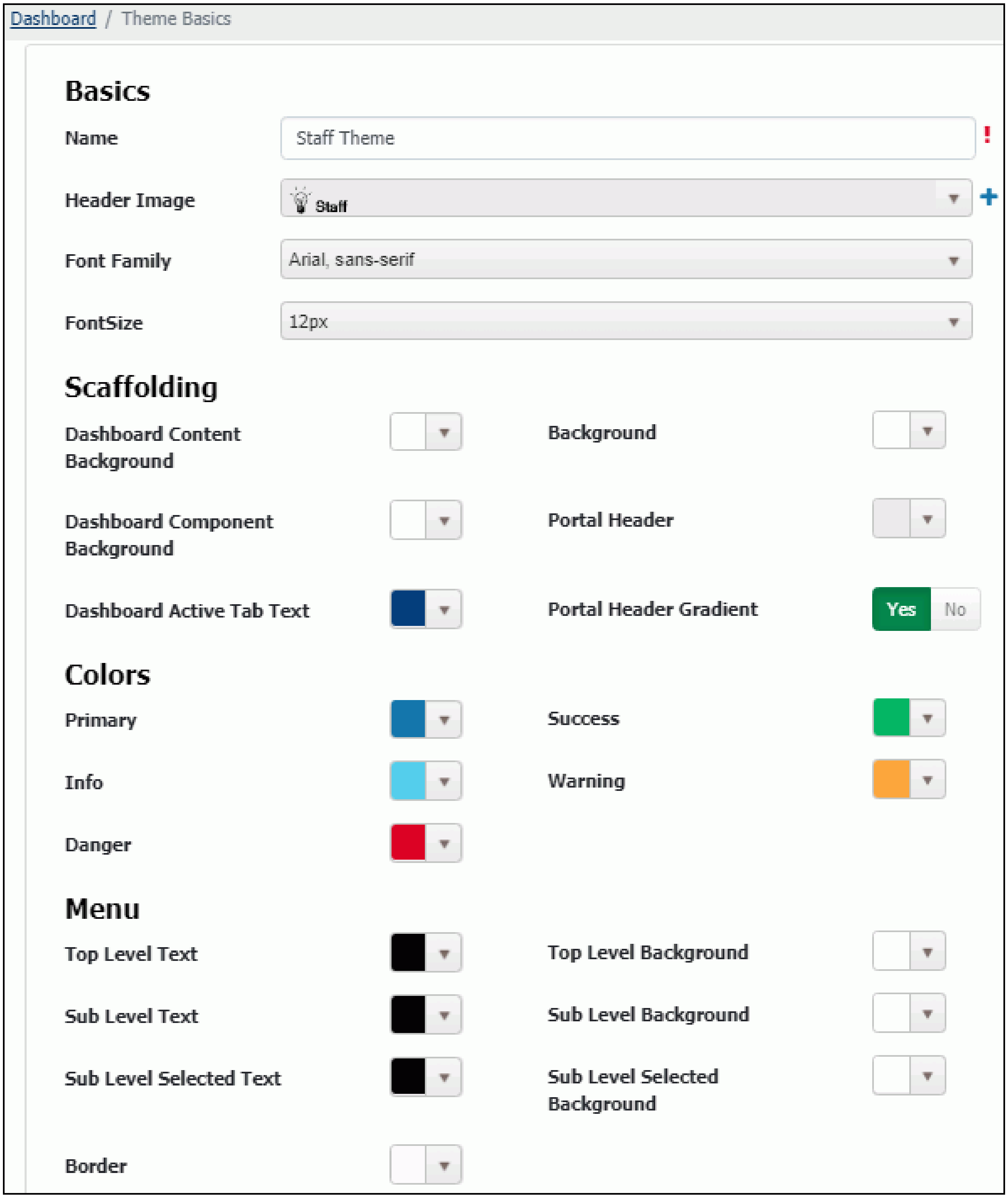
- To display tweets that include a specified search term, enter the term.



Creating and Modifying a mySupport Portal Theme

A mySupport theme includes the colors, fonts, and header image; themes are created and customized using Bootstrap technology. A default set of themes is included in iSupport for you to use, copy, and modify. iSupport utilizes Bootstrap (www.getbootstrap.com), which contains HTML and CSS-based design templates for web pages. It enables web page layouts to adjust dynamically to different devices and screen sizes.

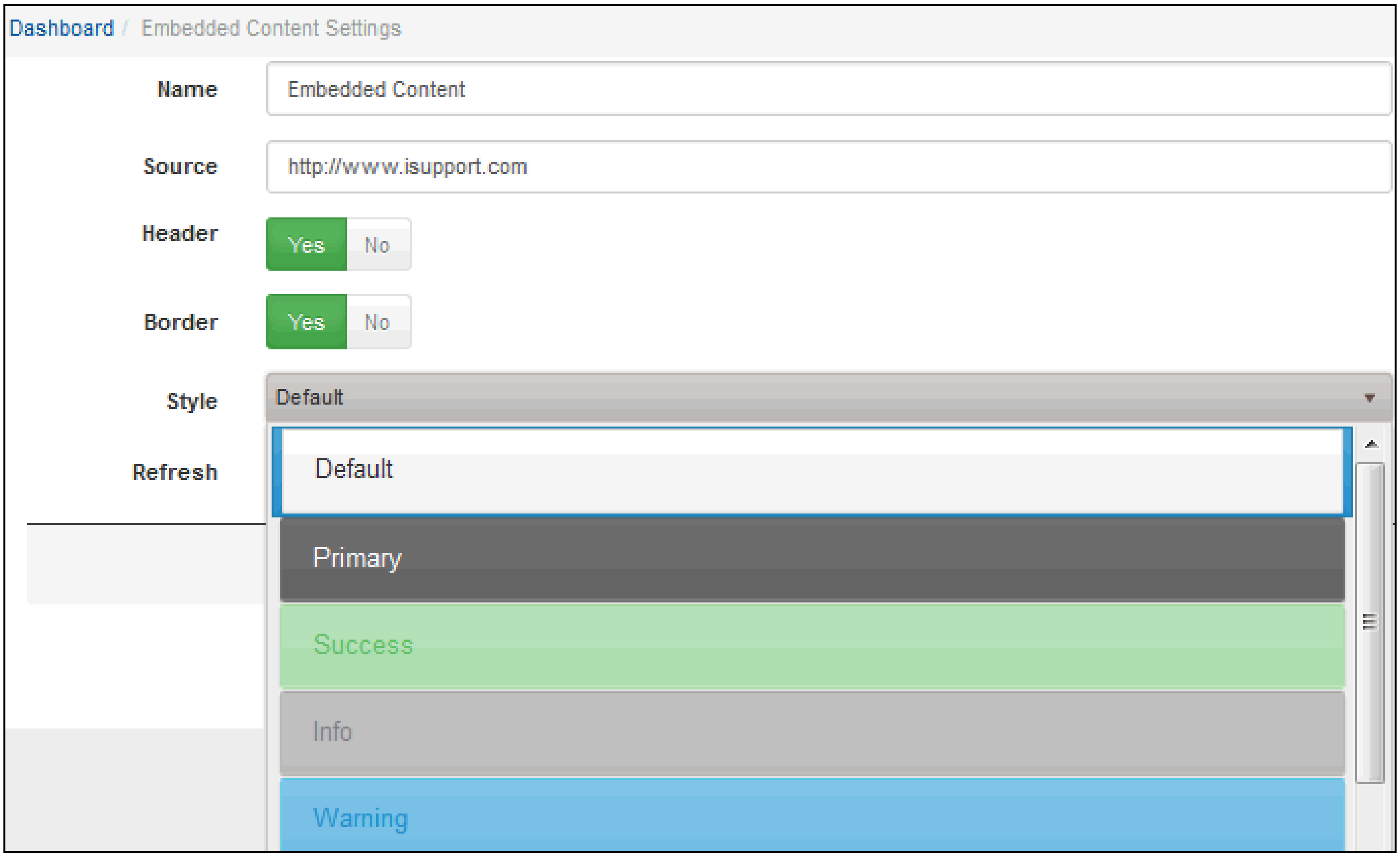
The Edit Theme Basics screen contains a subset of all the settings that affect different screen elements.



See "Portal Elements Affected by Basics Screen Settings" on page 121 for a list of the portal elements affected by the settings in the Scaffolding, Colors, and Menu sections; see iSupport knowledge entry EBIK684287 (http://mysupport.isupport.com/KnowledgeBase/View/3758) for examples and more information. Note that you will need to authenticate in order to display this entry.

Note that the image selected for the header will be reduced to 100 pixels high (width reduced proportionately) on the mySupport portal interface.

The colors set in the Edit Basics screen can be used for component headers and borders via the Style field in the component settings dialog.



The option labeled "Default" is light gray by default. This setting affects the following screen elements:

- Headers for all components
- Submit screen header
- Account Settings subheaders

Portal Elements Affected by Basics Screen Settings

Scaffolding

Dashboard Content Background: Area surrounding components on dashboards, feed content background

Dashboard Component Background: Background inside components on dashboards

Dashboard Active Tab Text: Text on selected tabs

Background: Current dashboard tab, area above and below menu, tab on submit screen

Portal Header/Portal Header Gradient: Header containing the logo and menu icon at the top of the portal

Colors

Primary:

- Links, Vote button, and share icon on discussion feeds
- Buttons on work item submit screen, View Customer Profile button
- Field labels in feeds and work item submit screen
- Knowledge entry links in Knowledge component

- Current tab and other tab labels for FAQs
- Top header in Login dialog and Account Settings
- Headers in Advanced Search (accessed via search bar above work item feeds)
- Header and footer in views
- Icons and labels in Navigation Tile component
- Service catalog icon text
- Self Help Guide section borders
- Inactive dashboard labels, Edit and Save icons when adding a dashboard

Info:

- Scroll bars and headers on feeds accessed from a navigator link
- Notification subsection headings in Account Settings
- Global Search results bar that contains the Create a Post, I Need Help, and Create an Incident buttons
- List header on Select Customer dialog for purchase submit
- Tutorial icon when a tutorial is associated with a dashboard via the Tutorials screen

Danger: Logout icon, required field indicators (exclamation points, text, and highlights, "Please wait" progress indicator

Success:

- Section headers in Knowledge component and Discussion Feed List navigator feature
- First field in feed component, first line in Headline and Knowledge feeds
- Active selection on Yes/No buttons
- Blank row when adding a dashboard
- Related Items link on incident and change submit
- Customer selection links on purchase submit

Warning: Show menu (navigator) and Account Settings icons, current selection on category tree and service catalog, component frame when adding a dashboard

Menus

Top Level Text: Navigator section header text

Top Level Background: Navigator section header background

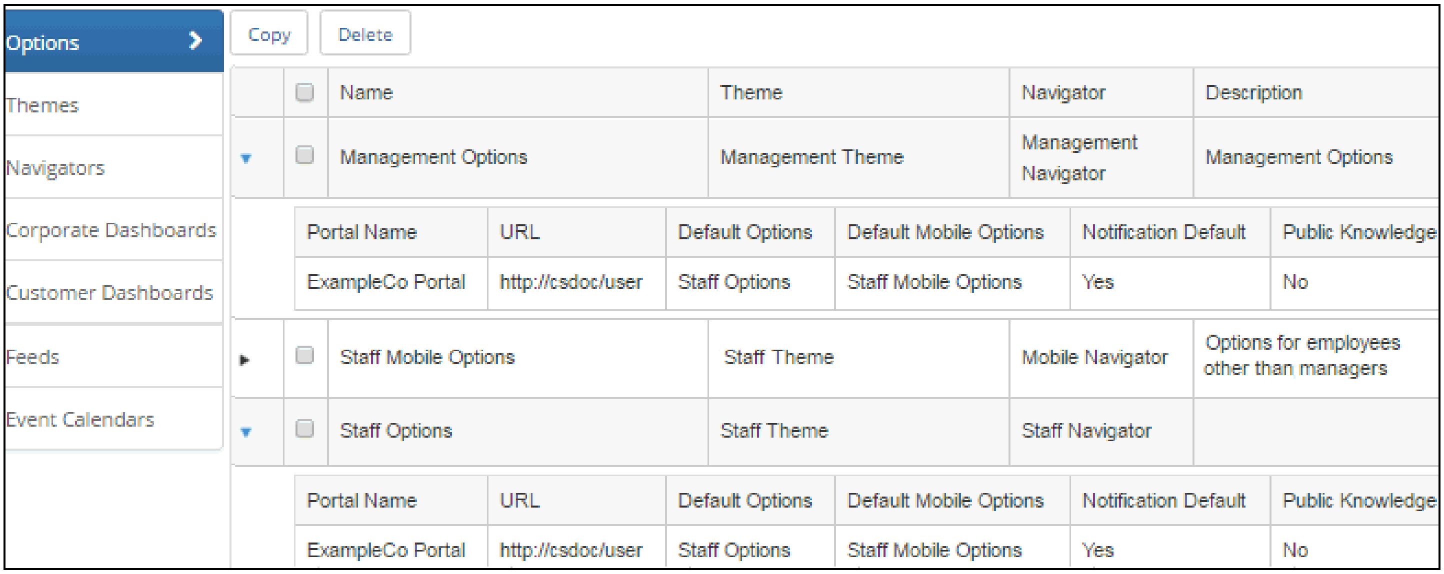
Sub Level Text, Sub Level Selected Text, Sub Level Selected Background: Navigator link text, selected link text, selected link background

Border: Separator and upper and lower border on navigator items

Managing Portal Items

Portal items include option sets, themes, navigators, corporate dashboards created via the Portal configuration screen, customer dashboards created via portals, feeds, and event calendars. Option sets are individually saved and can be associated with multiple portals; themes, navigators, and dashboards are individually saved and can be used by multiple option sets. These associations must be removed before an item can be deleted; for example, if a theme is used for an option set, a different theme must be selected for that option set (via the Portal configuration screen) before the theme can be deleted. If an option set is set as default for a portal, you’ll need to select another default option set for the portal (via the Portal configuration screen) in order to delete it.

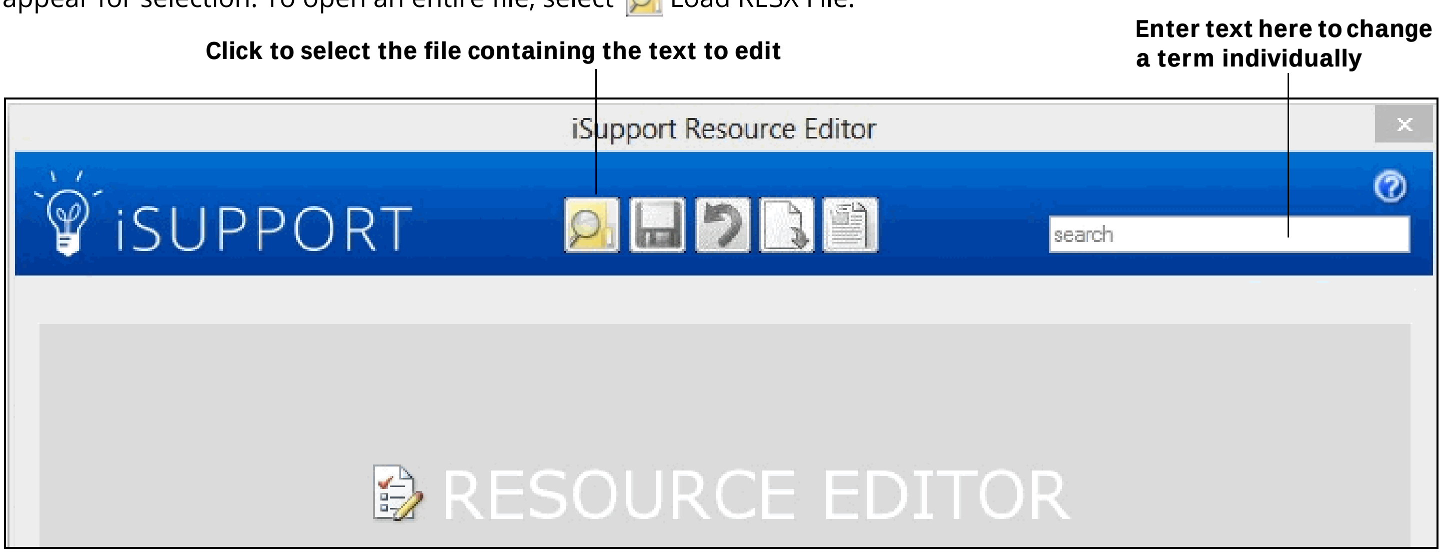
Use the Core Settings | mySupport | Manage Portal Items screen to display the defaults and associations for option sets, themes, navigators, dashboards, feeds, and event calendars and copy and delete portal items.



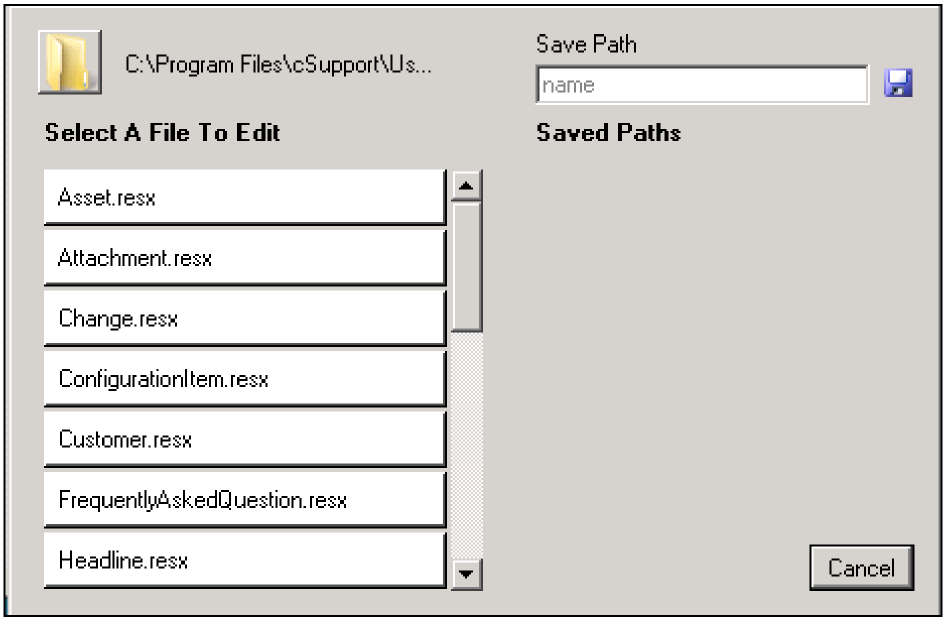
Using the Resource Editor to Customize a mySupport Portal

The Resource Editor in the Utilities subdirectory enables you to customize the text that appears for elements on the mySupport portal such as labels, messages, and the Help page. The person running the utility must be an administrator on the machine on which the utility is run. This text is stored in application resource (.resx) files that are named according to application functionality. You can save a file with a language culture code in parenthesis; for example, files translated in French would be Incident.resx(fr), and the translated settings would appear if the customer has the matching cultural setting. You can translate multiple files on one server, and the file that will appear to the user will be determined by the user's language setting.

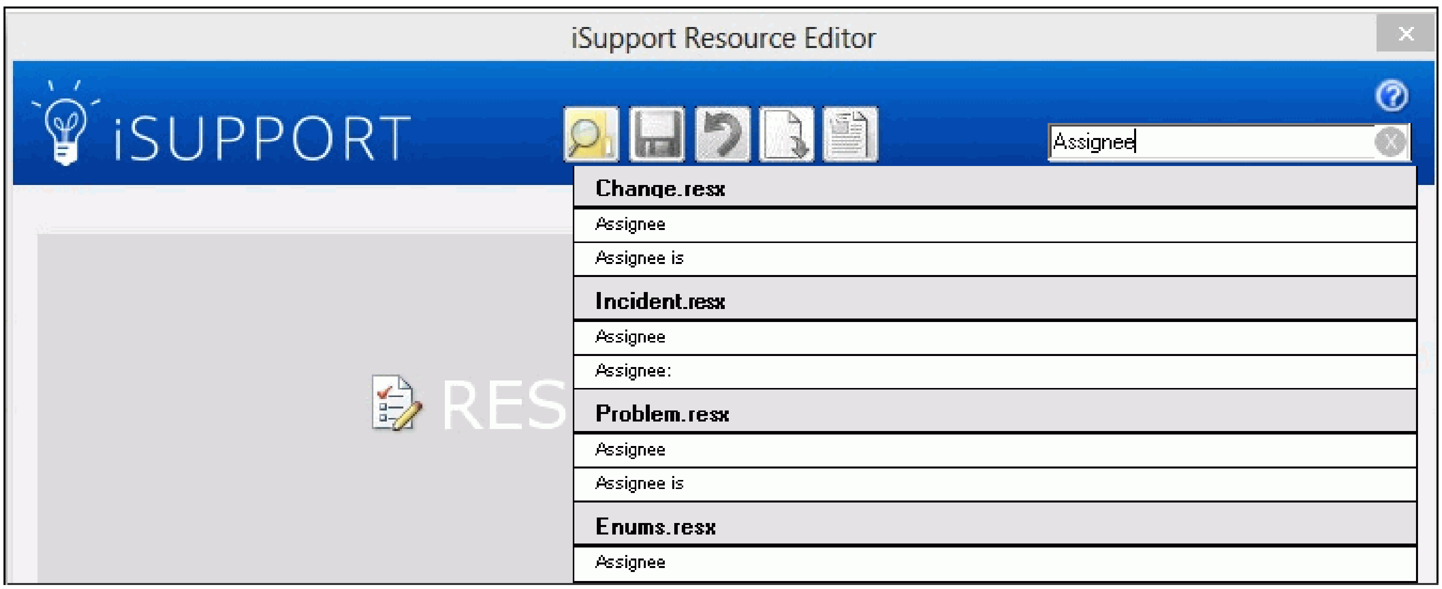
To change a term individually, enter the term in the Search field. All of the instances in which the term is used will appear for selection. To open an entire file, select Load RESX File.



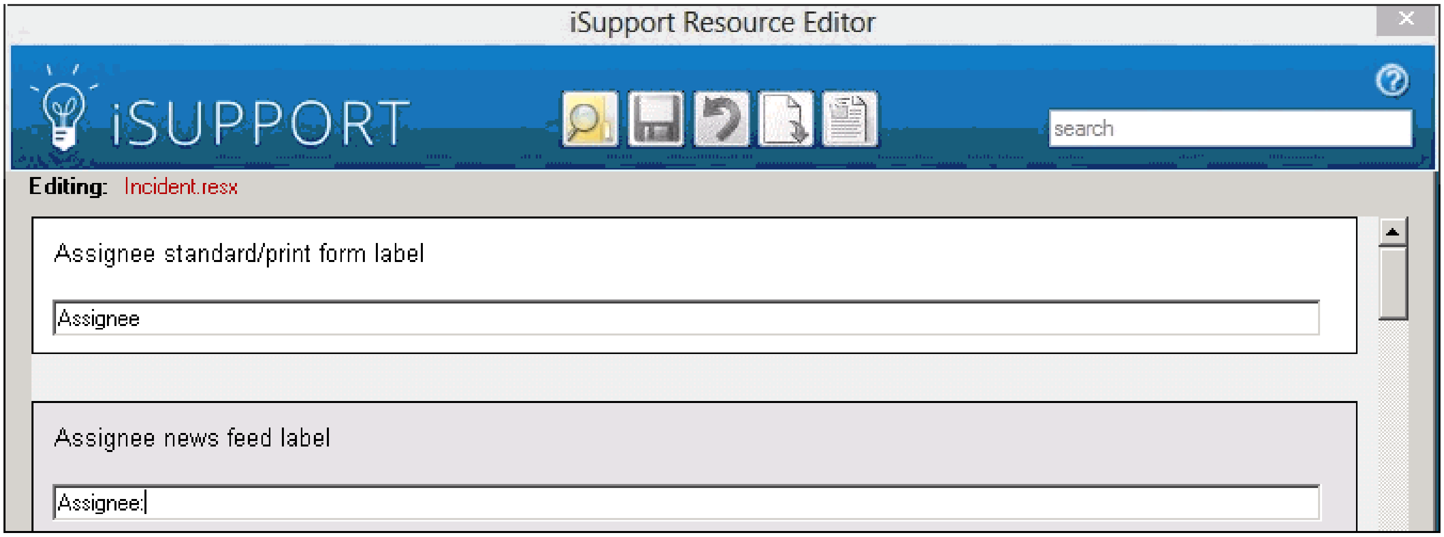
When you select Load RESX File, the following dialog will appear for selecting a file:



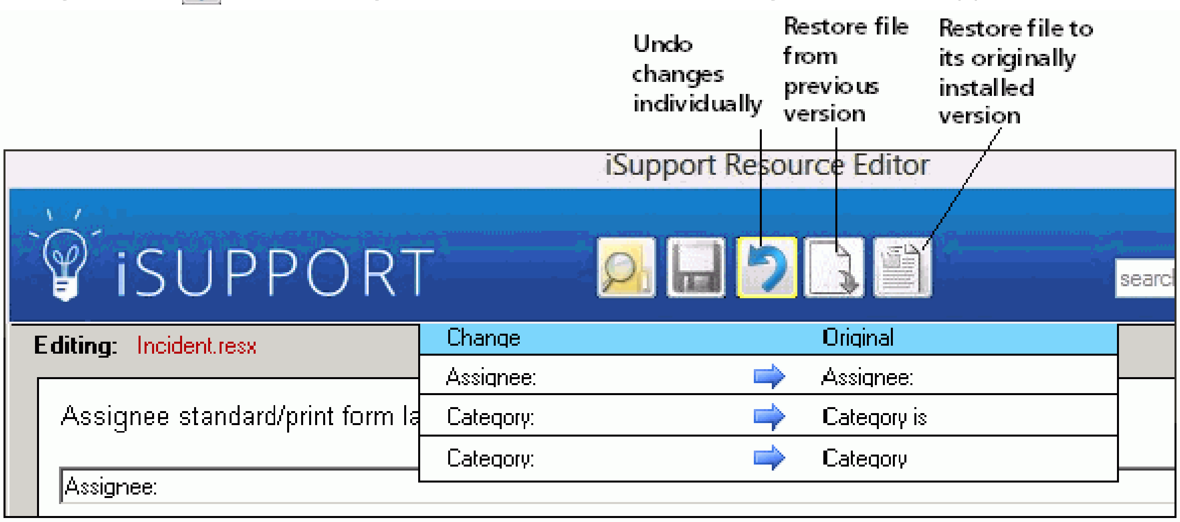
An entry in the Search field will display all of the instances in which the term is used; select the term you wish to change and it will open the file containing that term.



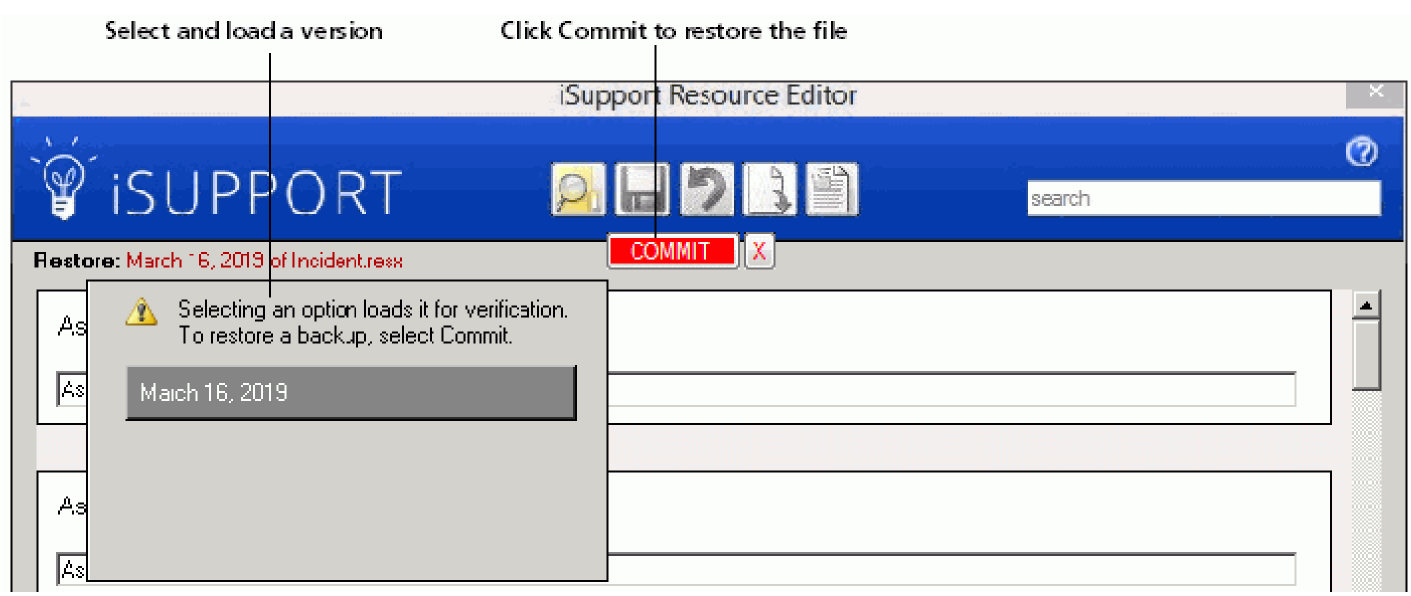
After selecting a file the labels, messages, etc. in the file will appear for you to make changes.



To undo a change, select Undo Changes to the Current File; the changes made will appear in a list for selection.



To restore a file to its originally installed version, select Restore File To Its Originally Installed Version. To select a previously saved version to restore, select Restore Previously Modified Versions of the Current File.



Setting Up Microsoft Windows-Based Authentication for a mySupport Portal

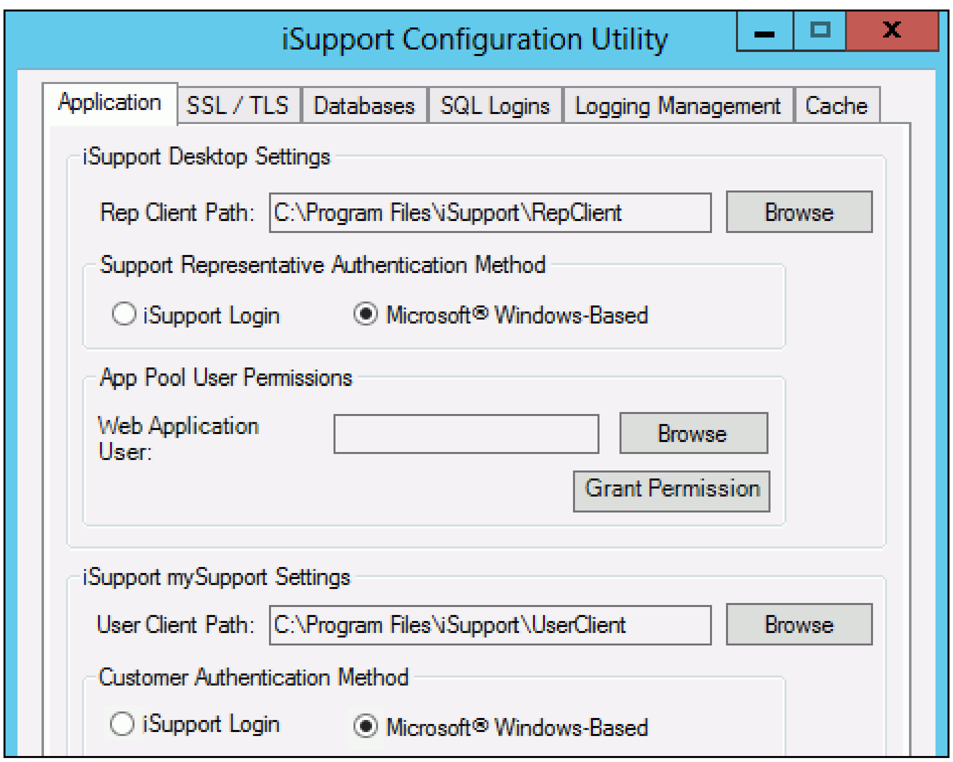
You can set up Microsoft® Windows-based authentication to enable customers to bypass the Login prompt for accessing the Submit, View, or template features for incidents, problems, changes, and purchase requests/orders on a mySupport portal. A Microsoft® Windows user name (*domainname\username*) must be included in each customer's Profile record. It's a good idea to perform these steps after work hours.

When the iSupport application is accessed, IIS will pass the *domain\username* to iSupport, retrieve the user's Customer Profile record based on this login, and set up roles appropriately. The Login prompt will not display when a customer accesses the Submit Incident, View Incident, or template features on the mySupport portal.

This option is an alternative to iSupport's built-in authentication method which requires a mySupport portal login in the customer's Profile record; that login must be distributed to the customer.

1 For each customer, enter the complete Microsoft® Windows user name (*domainname\username*) in the mySupport User Name or Secondary User Name fields on the mySupport tab in the Customer screen. (If using iSupport's Active Directory integration, the initial synchronization process will populate the Secondary User Name field if the iSupport Services user account is a domain level account.)

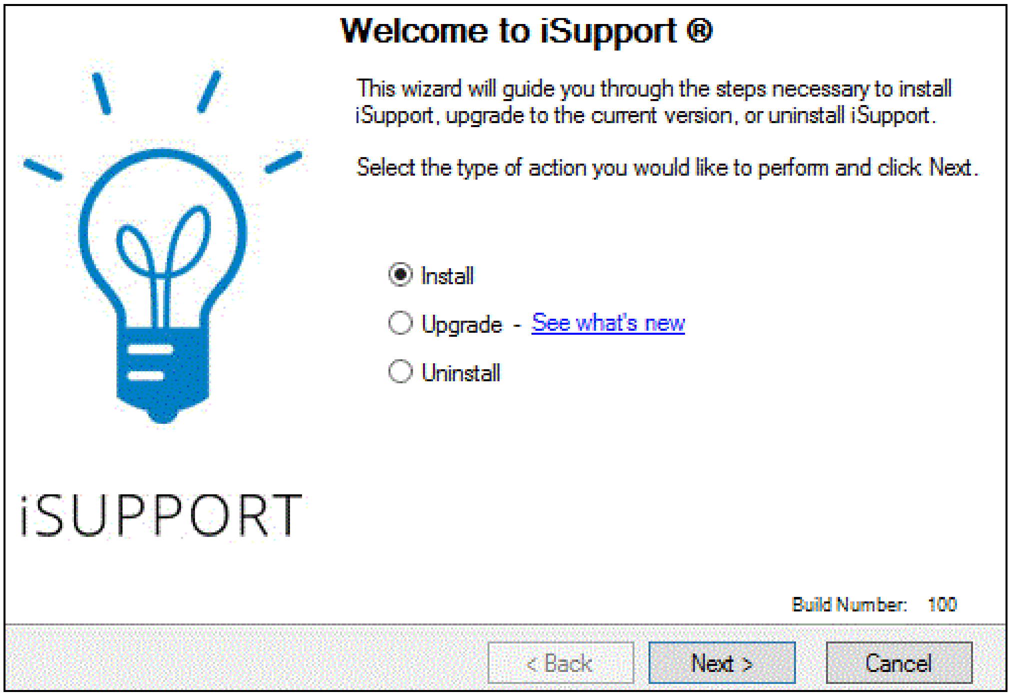
2 Open the iSupport Configuration Utility in the Utilities folder in the directory in which iSupport is installed. In the mySupport File Path field, select the location of the mySupport portal (UserClient by default). Select the Microsoft® Windows-Based radio button in the mySupport Settings section and then click Apply.



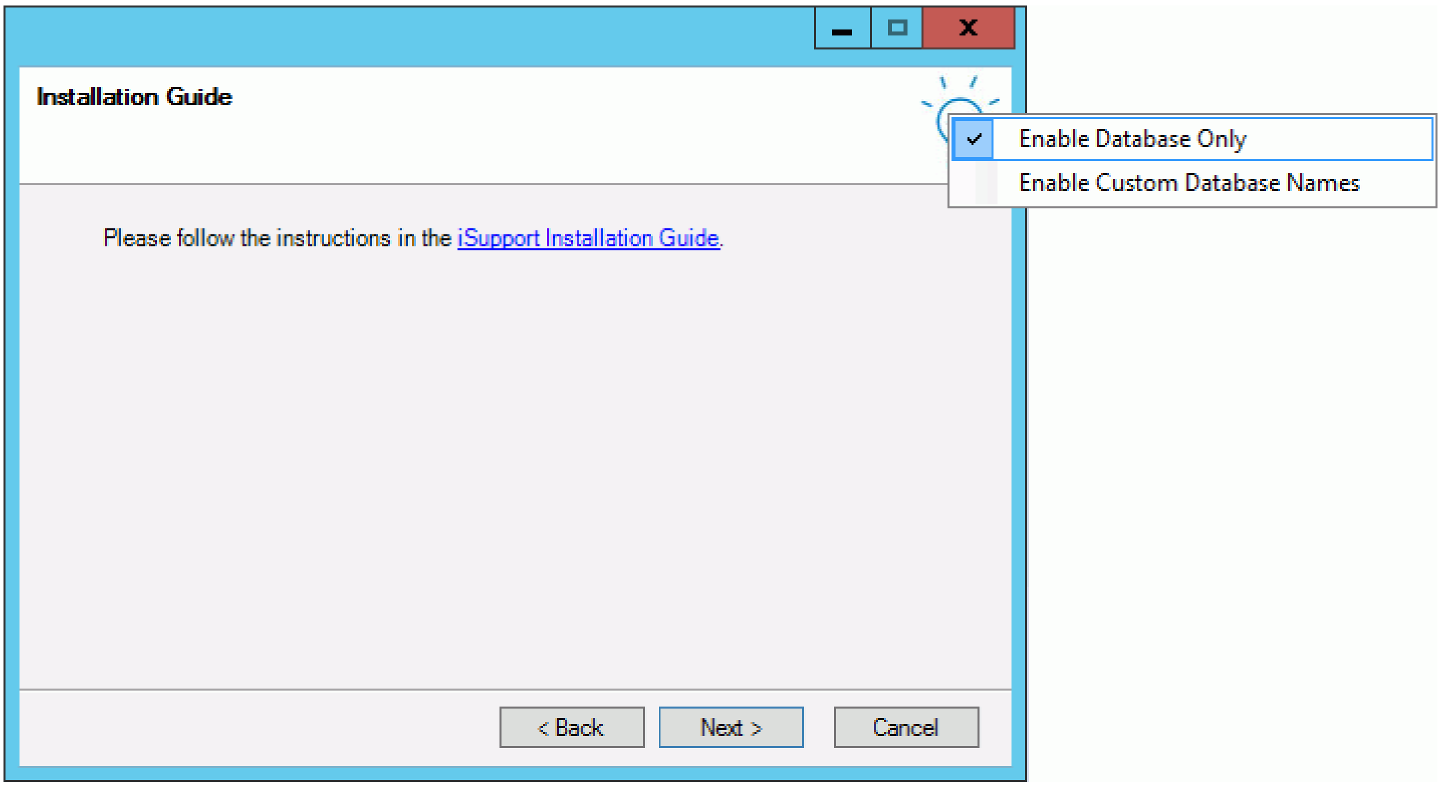
Creating Additional mySupport Portals

Follow these steps if you are creating a second/additional mySupport portal and it will use a different app URL name:

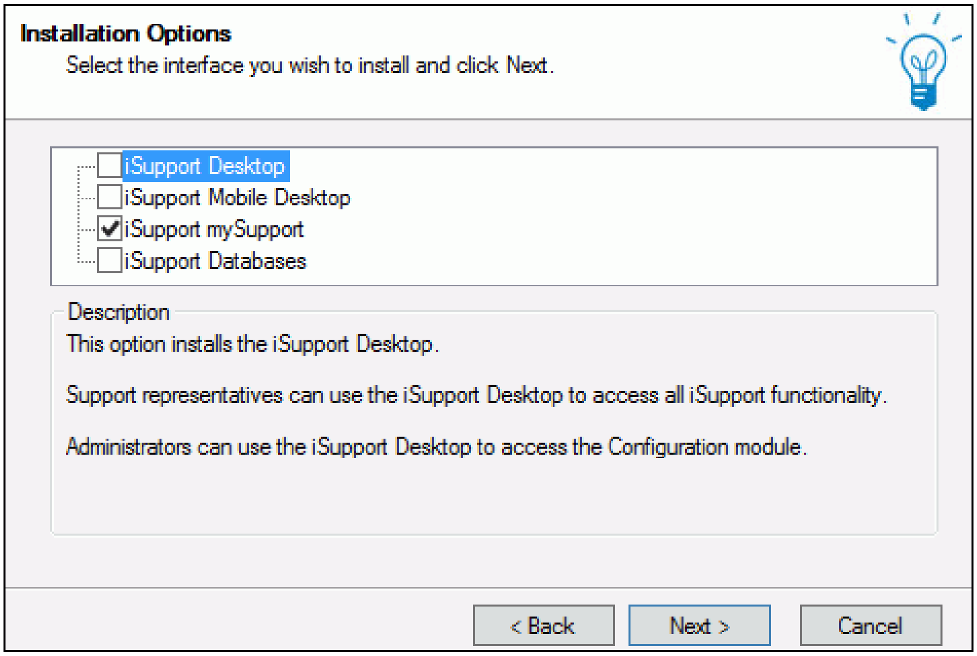
1 Run the iSupport installer (setup.exe), select Install in the Welcome dialog, and click Next.



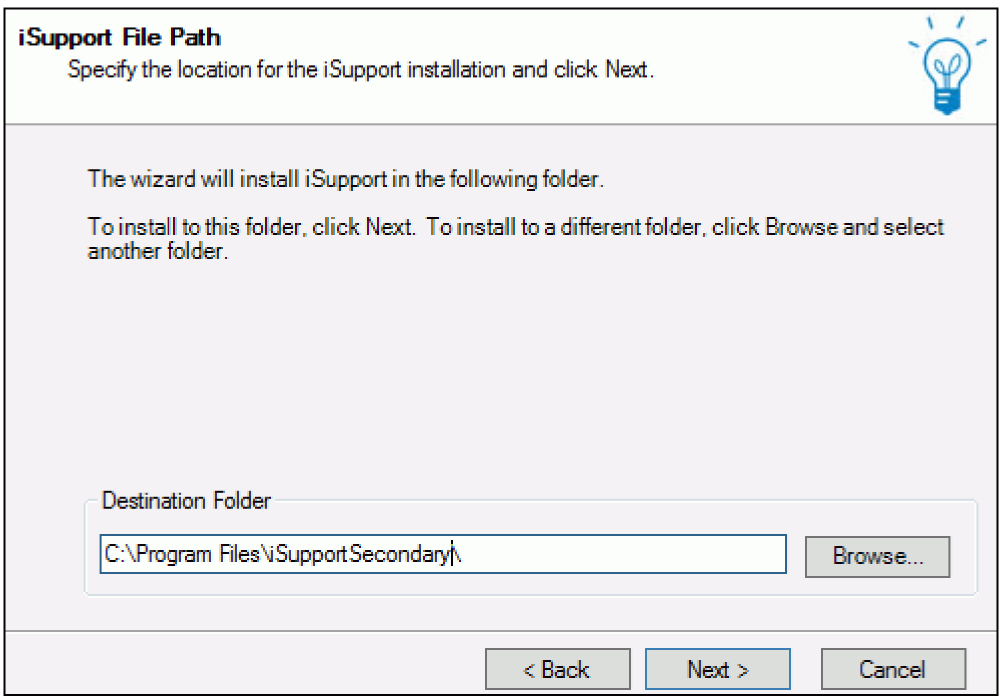
2 In the Installation Guide dialog, right-click on the light bulb and select Enable Database Only. Then click Next.



3 In the Installation Options dialog, deselect all of the options except the iSupport mySupport option. Click Next.



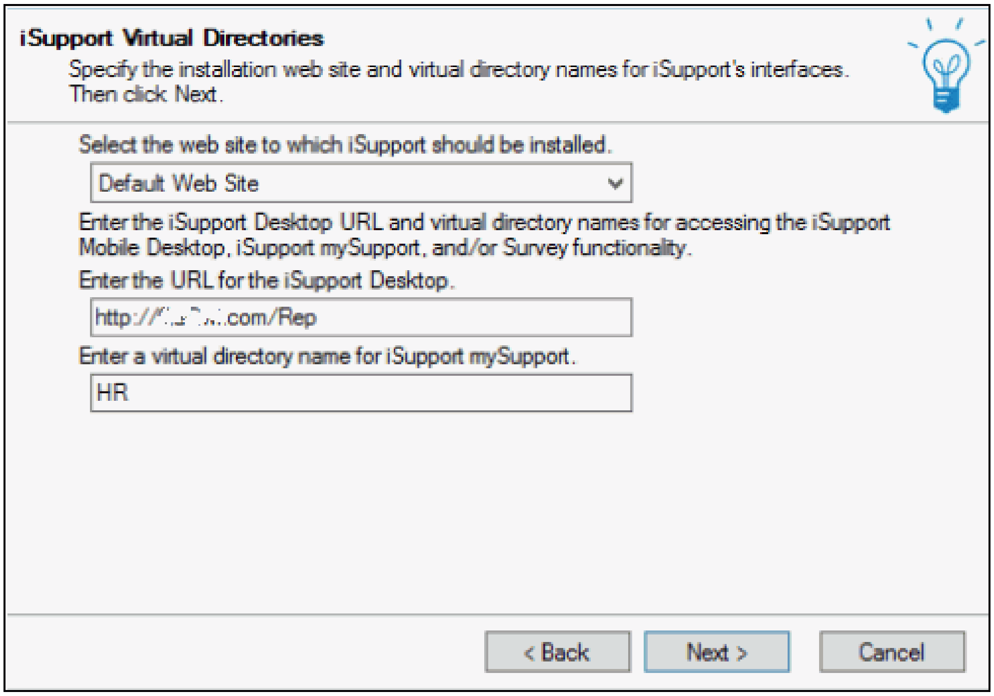
4 In the iSupport File Path dialog, select the folder in which the mySupport portal files should be installed. If this on the same server, it must be different from the default User folder.



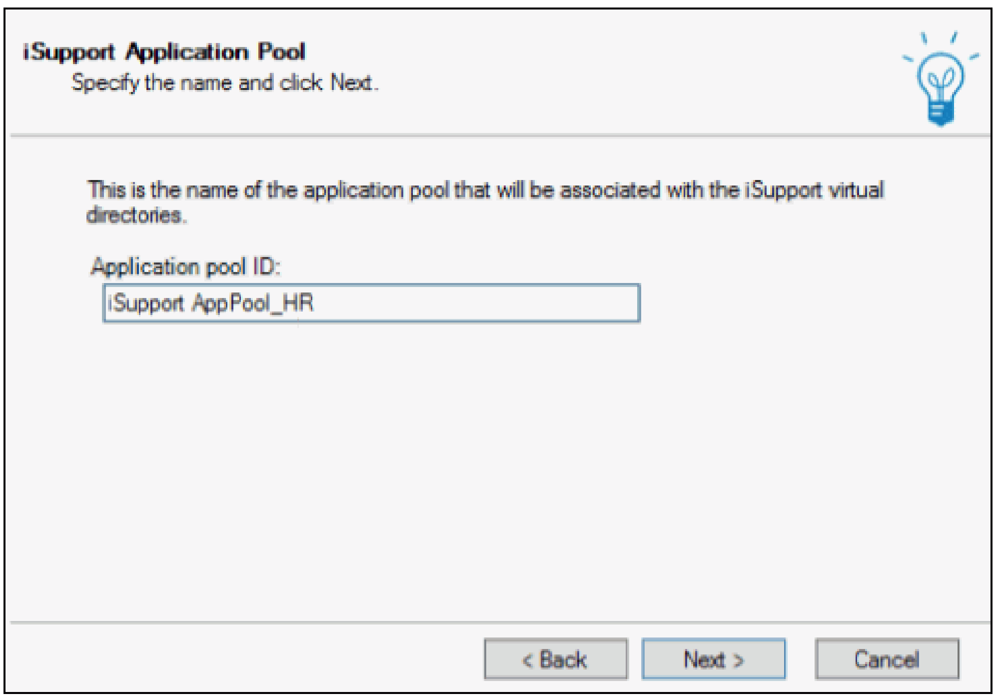
5 In the iSupport Virtual Directories dialog:

- Select the web site to which iSupport is installed.
- Enter the URL for your Rep site on the server (the URL your reps use to access the application).

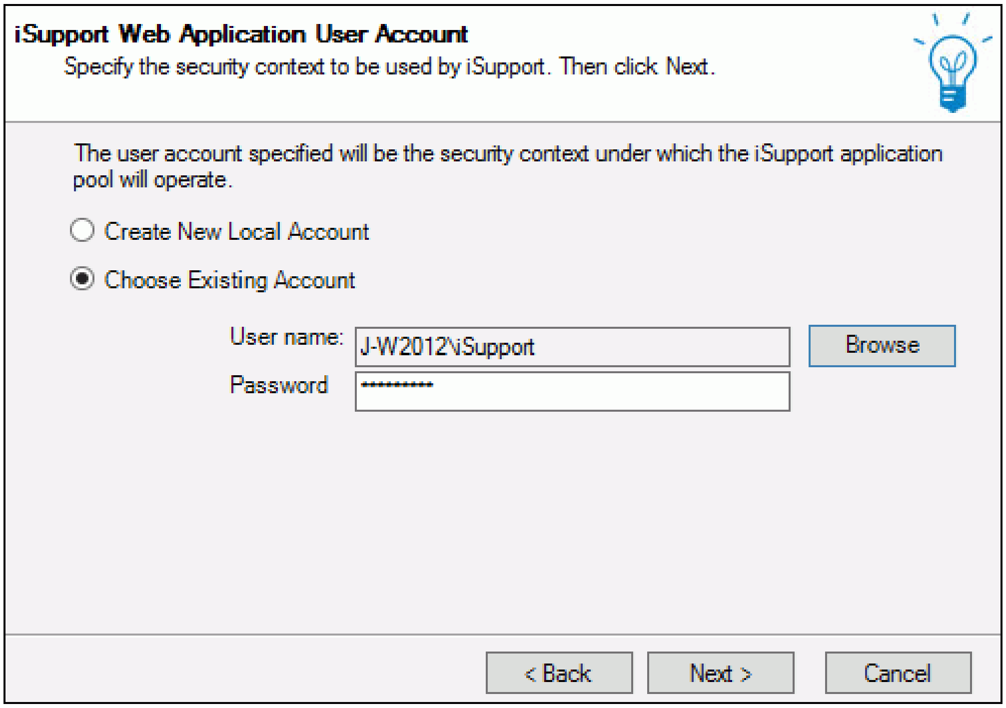
- Enter a virtual directory name for the mySupport portal site; this name will be used at the end of the URL for customers accessing the portal. Do not use spaces in the virtual directory entries.



6 In the iSupport Application Pool dialog, enter the name of the iSupport App Pool under which the new portal will run. If on the same server, this name must be different from your existing iSupport App Pool account. Click Next.

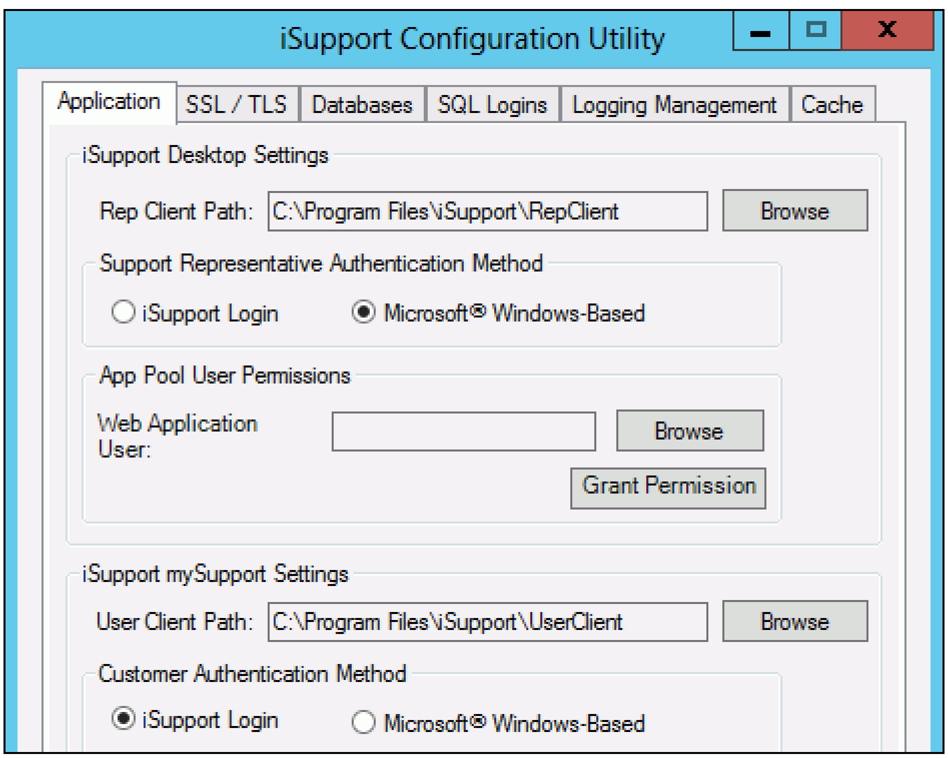


7 In the iSupport Web Application User Account dialog, select the user account for the iSupport web application to use to connect to SQL Server. Click Next.

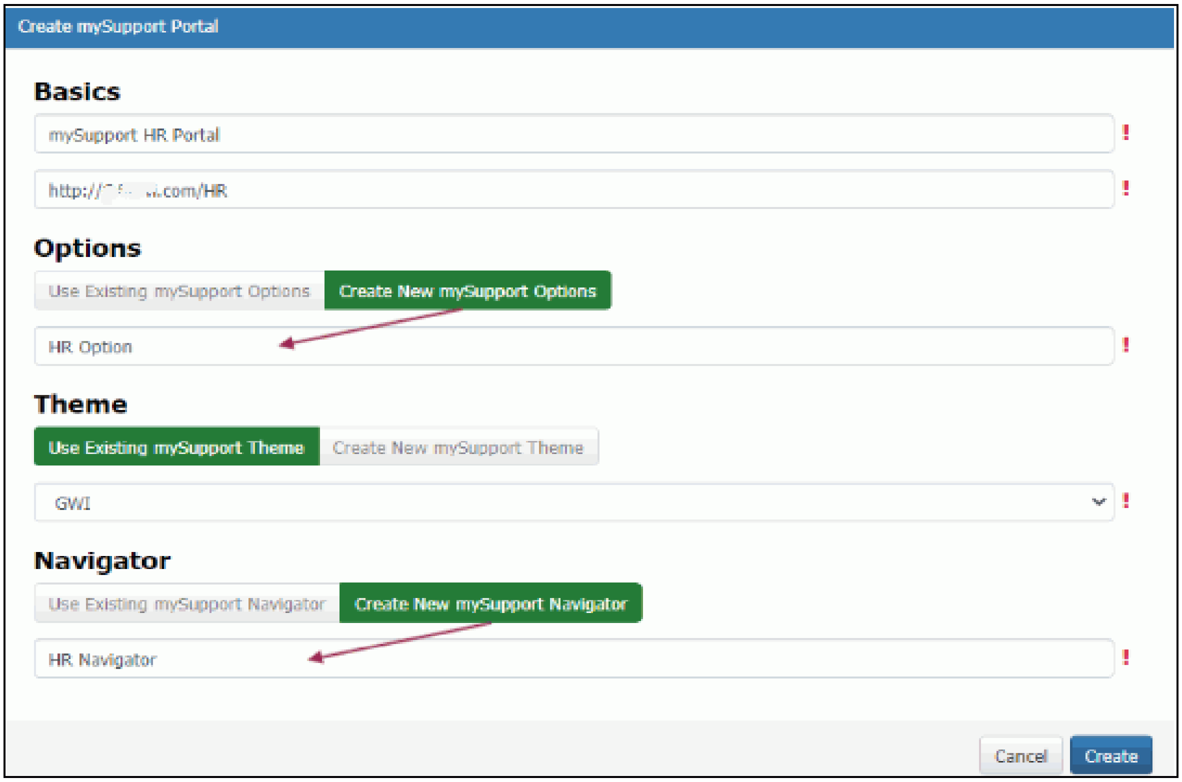


8 The Review Settings dialog appears with your selections; if you need to make a change, click Back. Otherwise, complete the installation.

9 Set the authentication method for the second mySupport site. Go to the path in which you installed the second portal files, open the Utilities folder, and run the iSupport Configuration Utility.exe. In the mySupport File Path field in the iSupport mySupport Settings section, ensure that the location of the second portal is selected. Then select the authentication method to use for the mySupport portal interface: iSupport Login (Forms) or Microsoft Windows-Based (Windows Authentication). Click the Apply Button and then click the OK button.



10 If you haven't done so already, add the new portal in iSupport via the Configuration |Core Settings | mySupport | Portals screen.

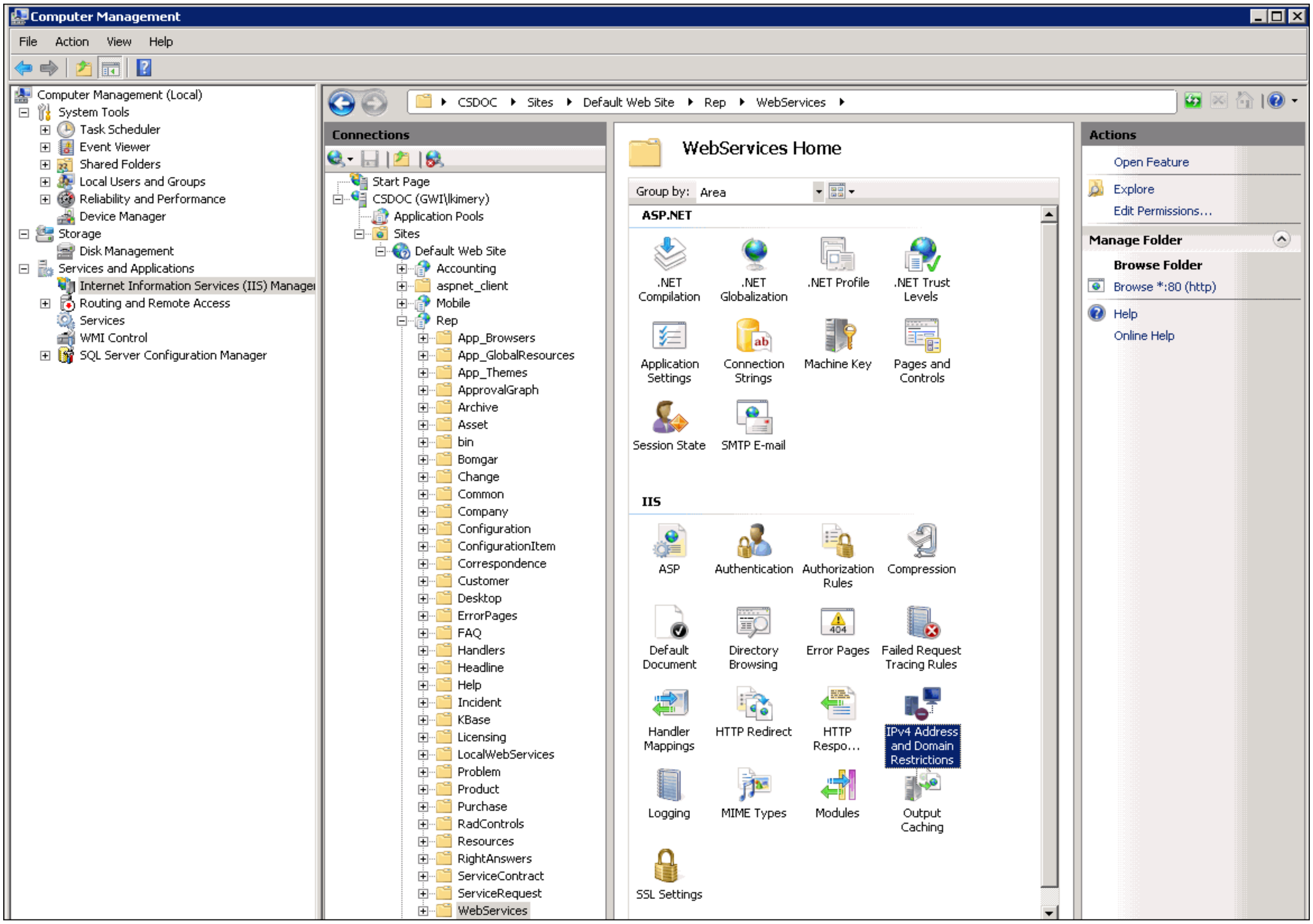


Increasing Security on a mySupport Portal

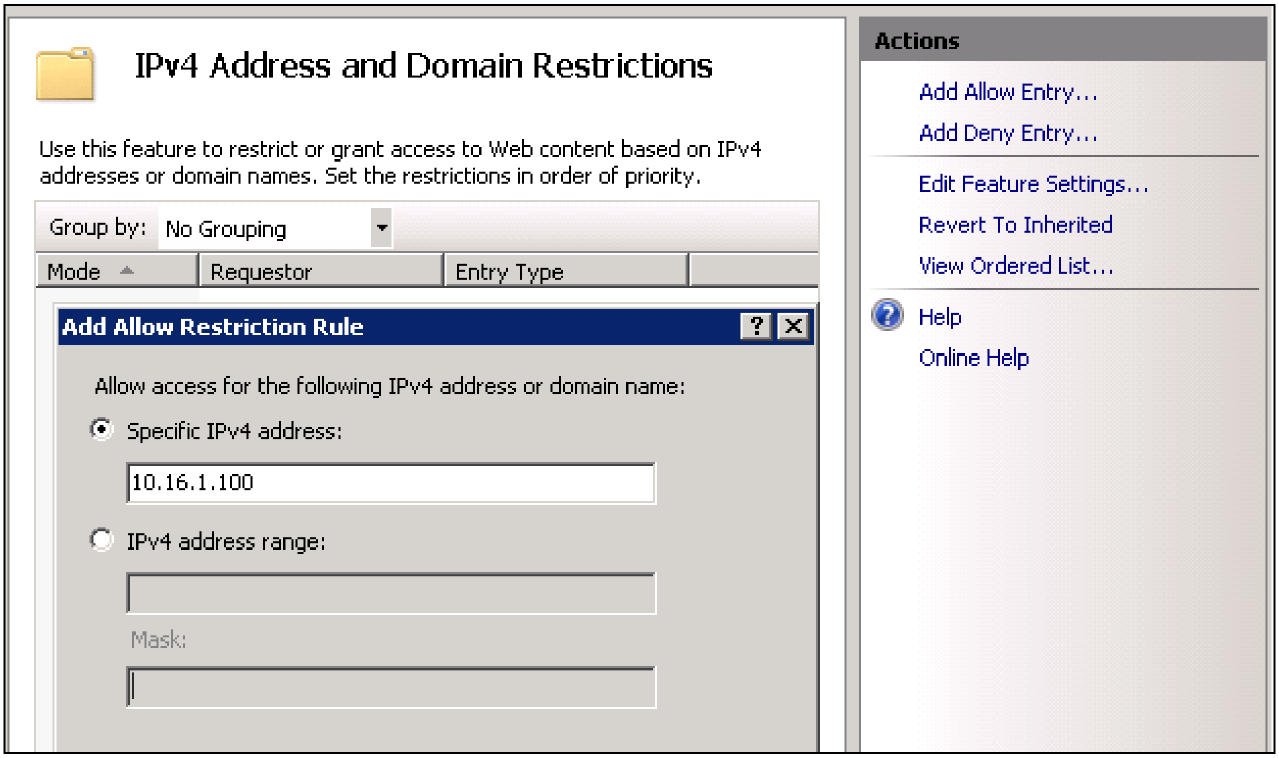
Follow these steps to allow only specific, trusted IP addresses to access the iSupport web services used by mySupport. This reduces the possibility of unauthorized access.

1 From the Start menu, select Administrative Tools | Computer Management. Click on Internet Information Services in the Services and Applications section. Under Sites | Default Web Site, expand the Rep folder (this name may have been customized during installation.) Select the WebServices folder, select IPv4 Address and

Domain Restrictions in the WebServices Home section, and then click the Open Feature link in the Actions section on the right.



2 Use the Add Allow Entry and Add Deny Entry links in the Actions section on the right to enter a specific IP address or range of addresses.



Setting Up Single Sign On Authentication for mySupport

Use the Options and Tools| Integrate | Single Sign On Integrations screen to enable a third party application identity provider (such as Shibboleth and Otka) to pass user credentials so that a user can sign in to mySupport with the same credentials that they use to log into other applications. Note that iSupport's login method (forms-based) must be enabled for the iSupport mySupport portal (not Microsoft Windows-based authentication).

Note that if you need to register iSupport with an identity provider that will be used for authentication, it must be done prior to the creating/obtaining the metafile from the identity provider. The following provider and consumer URLs for all four iSupport sites might be needed to register iSupport with an identity provider that will be used for authentication:

Rep

- Issuer: rep_url/
- Consumer: rep_url/SingleSignOn.aspx

User

- Issuer: user_portal_url
- Consumer: user_portal_url/Account/SSO

Mobile (external)

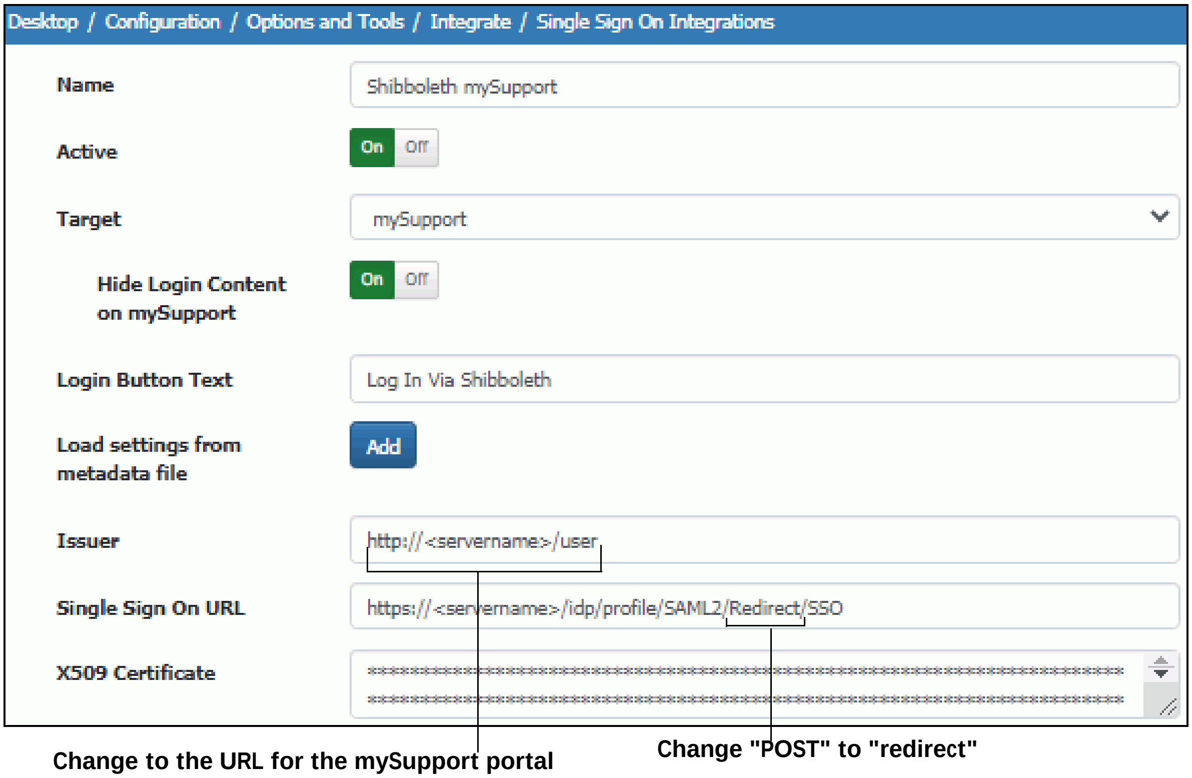
- Issuer: mobile_url
- Consumer: mobile_url/SingleSignOn.aspx

Mobile (internal)

- Issuer: rep_url/Mobile
- Consumer: rep_url/Mobile/SingleSignOn.aspx

Use the metadata file in the Load Settings From Metadata File field; when loaded, it will populate the Issuer, Single Sign On URL, and X509 Certificate fields. If using Shibboleth, you'll need to change the URL in the Issuer field to the

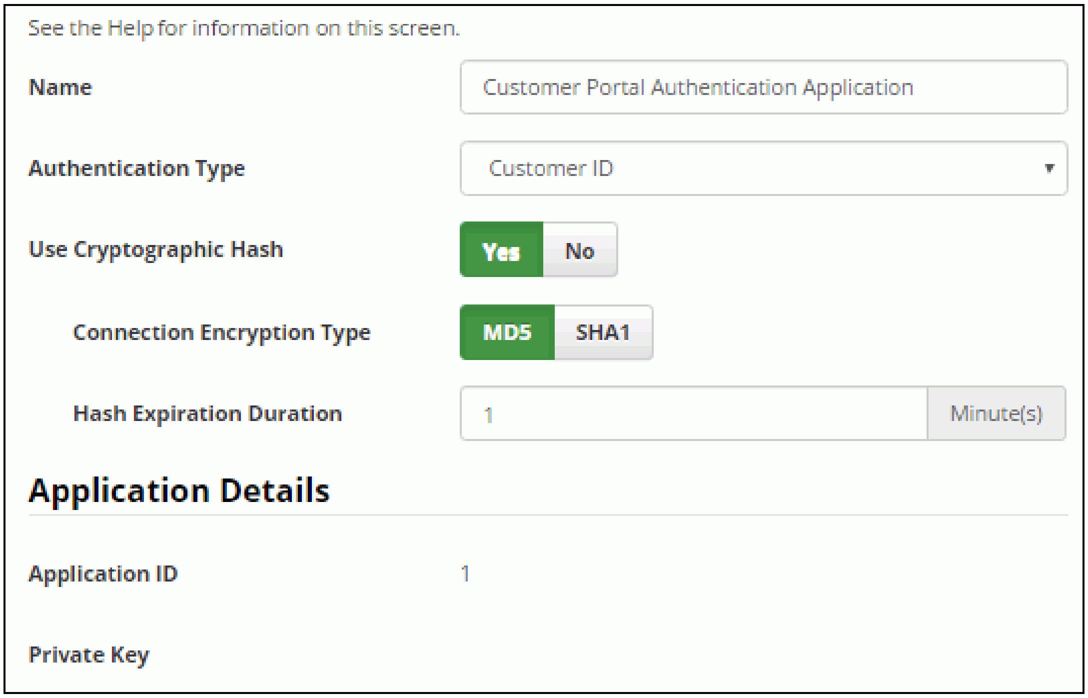
URL for the applicable iSupport interface (rep or user) and change “POST” to “Redirect” in the URL in the Single Sign On URL field.



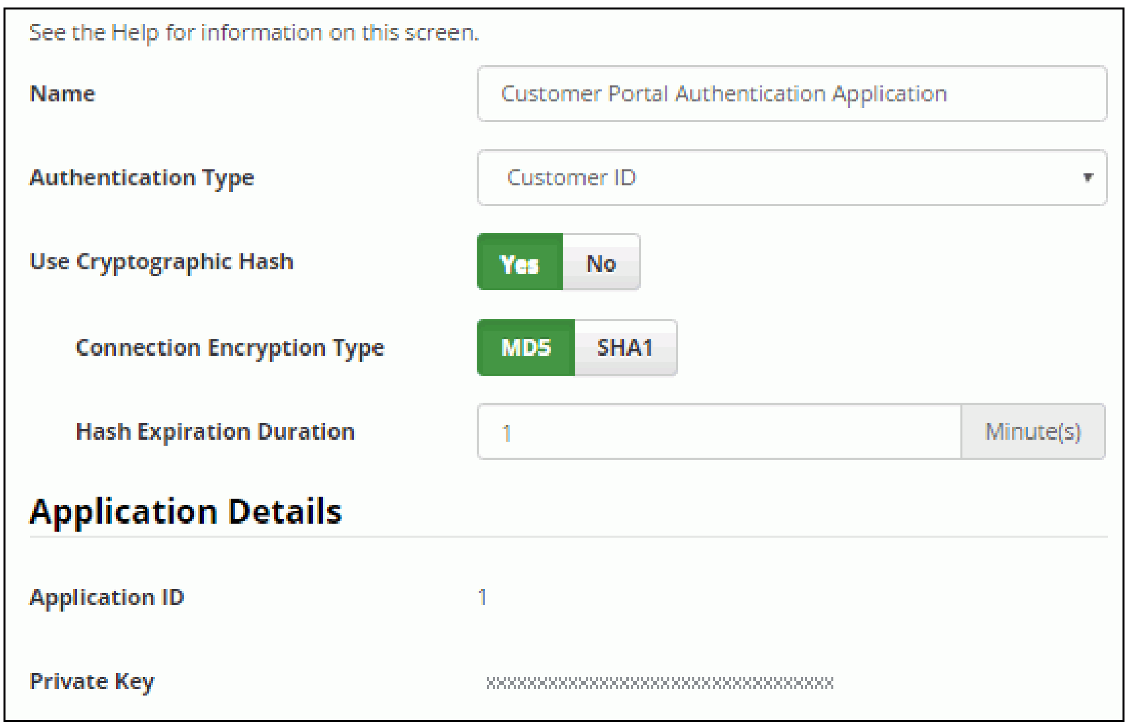
Use the Login Button Text field to enter the text to appear in the button for customers to use to log in via the iSupport login dialog; if On is selected in the Hide Login Content on mySupport field, the default Login button will be hidden.

Creating an Authentication Application for Single Sign-on

Use the Options and Tools| Integrate | Authentication Applications screen to configure a third party application (for example, a customer portal) to link to a mySupport portal’s login page and pass the credentials of the third party application and user in a query string. In the fields below, enter a descriptive name and select the value to be passed from the third party application to authenticate. If the passed value will be hashed, enable cryptographic hash, select the hash algorithm type, and enter the expiration duration in minutes.



Once saved, the record will have an Application Identifier (and a Private Key if Use Cryptographic Hash was set to Yes).



Configure the third party application to:

- Link to the mySupport portal's application login page; the construction of the link depends on the options selected in the authentication application.
- Pass the credentials of the third party application and the user in the query string. The following query string parameters are required:

  Application Identifier – "appId"

  Authentication Type:

- **Customer ID** – **"**login"
- **Login** – **"**login"
- **Secondary Login** – **"**login"
- **Synchronization Key** – **"**login"
- **Customer Email, First, and Last Name** – **"**fname", "lname", "email"

If cryptographic hash is enabled, the following query string parameters are required:

- **"timestamp"** – the time the hash value was created; the date should be expressed in the following UTC (Coordinated Universal Time) ISO 8601 format:

  Complete date plus hours, minutes and seconds: YYYY-MM-DDThh:mm:ssTZD (e.g. 2012-02-16T19:20:30Z)

  DateTime.UtcNow.ToString("yyyy-MM-ddTHH:mm:ssZ")

- **"hash"** – an MD5 or SHA1 hash of the private key, time stamp, and login values delimited by commas.

  Example of the value to be MD5 hashed:

  - **Authentication Type** – (login, fnam, lname, and email values should be lower case)
  - **Customer ID** – "416ec4c1-4349-4d69-9795-17df0e22538b,2012-02-16T19:20:30Z,123456"
  - **Login** – "416ec4c1-4349-4d69-9795-17df0e22538b,2012-02-16T19:20:30Z,dgreen"
  - **Secondary Login** – "416ec4c1-4349-4d69-9795-17df0e22538b,2012-02-16T19:20:30Z,gwi\dgreen"
  - **Synchronization Key** – "416ec4c1-4349-4d69-9795-17df0e22538b,2012-02-16T19:20:30Z,c05b5793-67f1-4422-a8c8-c99cf81d9a09"
  - **Customer First Name, Last Name, Email** – "416ec4c1-4349-4d69-9795-17df0e22538b,2012-02-16T19:20:30Z,dan,dgreen,dgreen@gwi.com"

When the mySupport portal authenticates, the Authentication Application record for the "appid" parameter will be retrieved.

The user record will be retrieved by the "login" or by the "fname", "lname", and "email" parameter(s) based on the Authentication Type settings.

If cryptographic hash is enabled, the time stamp query string value will be checked to ensure it has been less that the Hash Expiration Duration specified in the record. Then the private key from the record, time stamp, and user values from the query string will be hashed and compared to the hash from the query string. If the time stamp is older than the Hash Expiration Time, or the hash does not match or required query string values are not provided, the user will be redirected to the login page.

Examples:

Application Name = Internal Customer Portal A

Authentication Type = Login

Use Cryptographic Hash = No

Application Identifier = 1

Link = http://example.com/user/account/applicationlogin?appid=1&login=dgreen

Application Name = internal Customer Portal B

Authentication Type = First, and Last Name, Email

Use Cryptographic Hash = No

Application Identifier = 2

Link = http://example.com/user/account/applicationlogin?appid=2&fname=dan&lname=green&email=dgreen@isupport.com

Application Name = External Customer Portal C

Authentication Type = Customer ID

Use Cryptographic Hash = Yes

Hash Expiration Time = 1 min

Application Identifier = 3

Private Key = 416ec4c1-4349-4d69-9795-17df0e22538b

Link = http://example.com/user/account/applicationlogin?appid=3&login=dgreen&timestamp=2012-02-16T19%3A20%3A30Z&hash=2488336E2973627D7BC36CE5F5CE7CAC

An optional “returnUrl” query string parameter can be specified to redirect the user to a specific page within the mySupport portal.

Link = http://example.com/user/account/applicationlogin?appid=3&login=dgreen&timestamp=2012-02-16T19%3A20%3A30Z &hash=2488336E2973627D7BC36CE5F5CE7CAC&returnUrl=%2fUser%2fIncidents%2f

Example of logic to generate the hash:

C# Hash Logic (compatible with PHP md5(string) method):

byte[] asciiBytes = Encoding.ASCII.GetBytes(value);

byte[] hashedBytes = MD5CryptoServiceProvider.Create().ComputeHash(asciiBytes);

string hashedString = BitConverter.ToString(hashedBytes).Replace("-", "").ToLower();

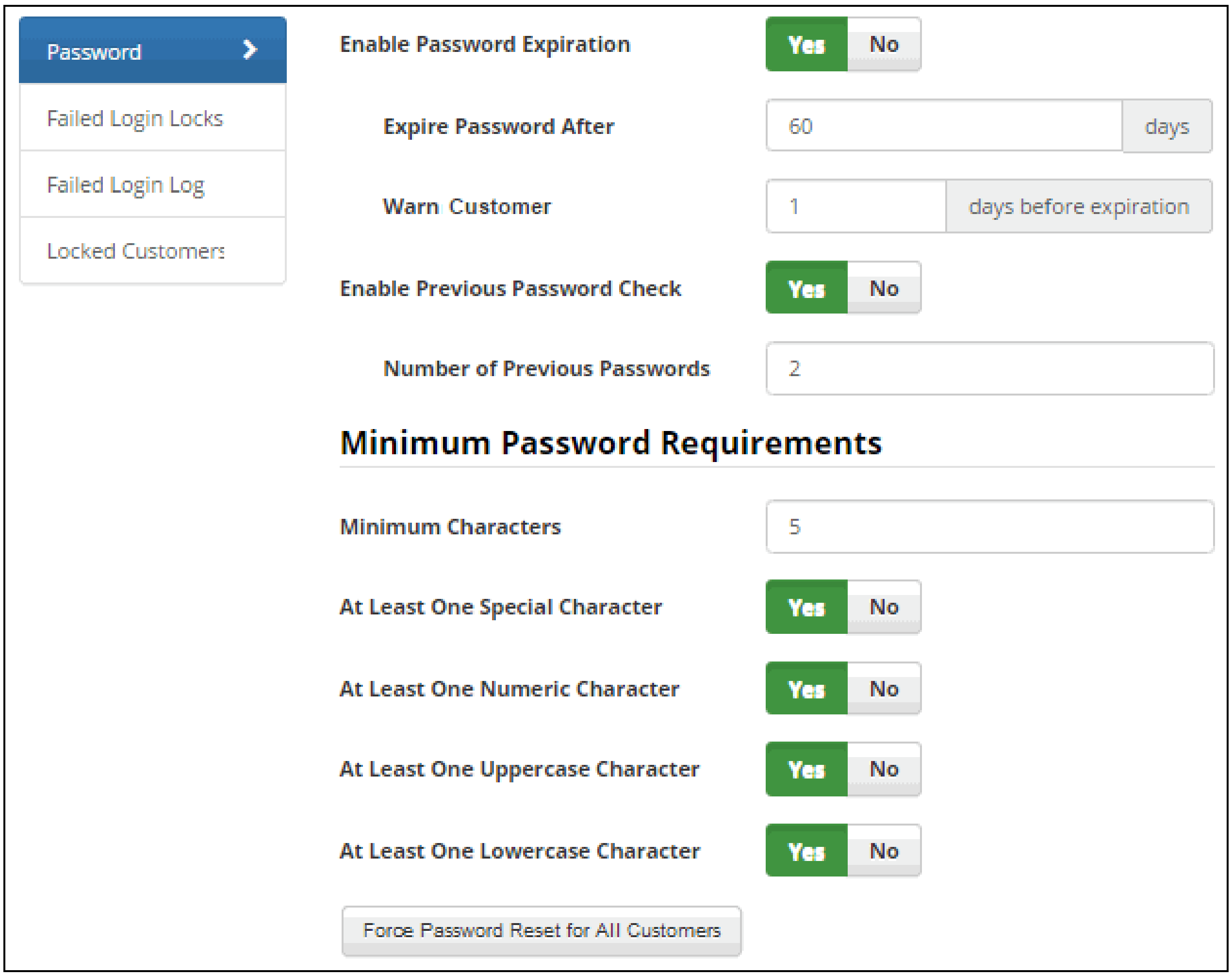
Configuring Password Complexity, Expiration, and Login Locks for Customers

If you are not using Microsoft® Windows-based authentication with iSupport, you can use the Customer Security screen to enable password security options and configure locks to prevent a customer who has exceeded a specified number of failed login attempts from logging in.

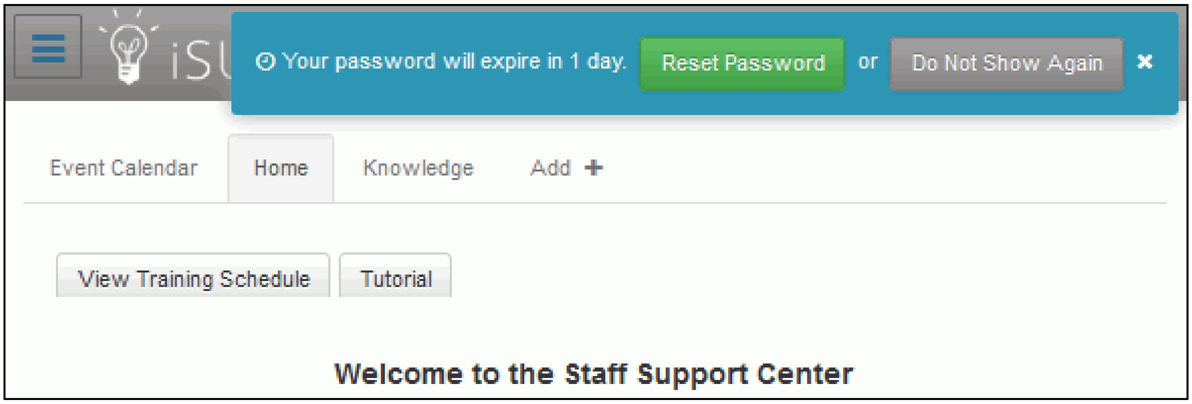
Note that CAPTCHA and multi-factor authentication can be enabled for a mySupport portal via the Login tab in the mySupport Options configuration screen; see the online help for more information.

Configuring Password Complexity and Expiration

Use the Password tab to enable a Forgot Password link, password expiration after a specified number of days, a previous password check with a specified number of previous passwords, and minimum password requirements. You can also force a password reset for all customers.



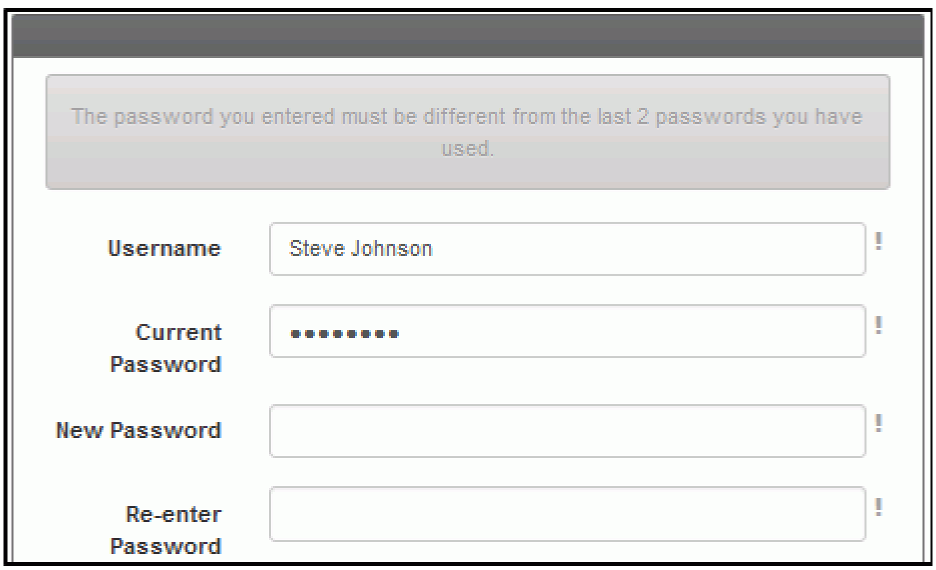
Enable Password Expiration - Select Yes to specify a number of days after which a newly entered login password will expire. The Password Expiration Warning dialog will display to the customer after every login via the mySupport portal until the configured time frame has been reached. The expiration timeframe will be based on the last time a customer reset their password or the date and time at which the Password Expiration feature was last configured. Note that expiration warnings will not appear on the mobile client.



Expire Password After *xx* Days - Enter the number of days after which a newly entered login password will expire. The expiration time frame will be based on the last time a customer reset their password or the date and time at which the Password Expiration feature was last configured.

Warn Customer *xx* Days Before Expiration - Enter the number of days before the expiration date in which to display the Password Expiration Warning dialog.

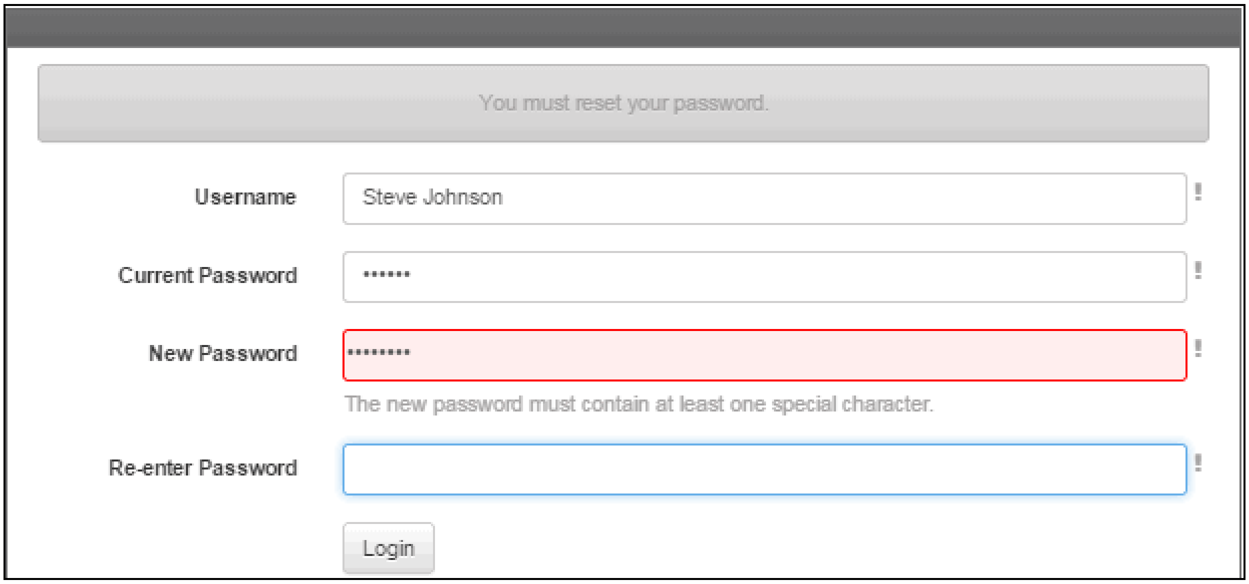
Enable Previous Password Check - Select Yes to compare a customer's new password with a configured number of the customer's previous passwords and prevent use of a matching password.



Number of Previous Passwords - Enter the number of passwords to check against a customer's new password.

Minimum Password Requirements

Use the fields in this section to require new passwords to contain at least one special character (not a number or a letter), numeric character (0-9), uppercase character, and lowercase character, as well as a minimum number of characters. If a customer tries to enter a password without the minimum requirements, a message will appear with the missing requirement.



Note that configured password requirements will be enforced when you enter a password in the Customer Profile screen.

Minimum Characters - Enter the minimum number of characters that a customer can use in a newly-entered password.

At Least One Special Character - Select Yes to require a customer's newly entered password to contain at last one special character that is not a number or letter.

At Least One Numeric Character - Select Yes to require a customer's newly entered password to contain at least one number.

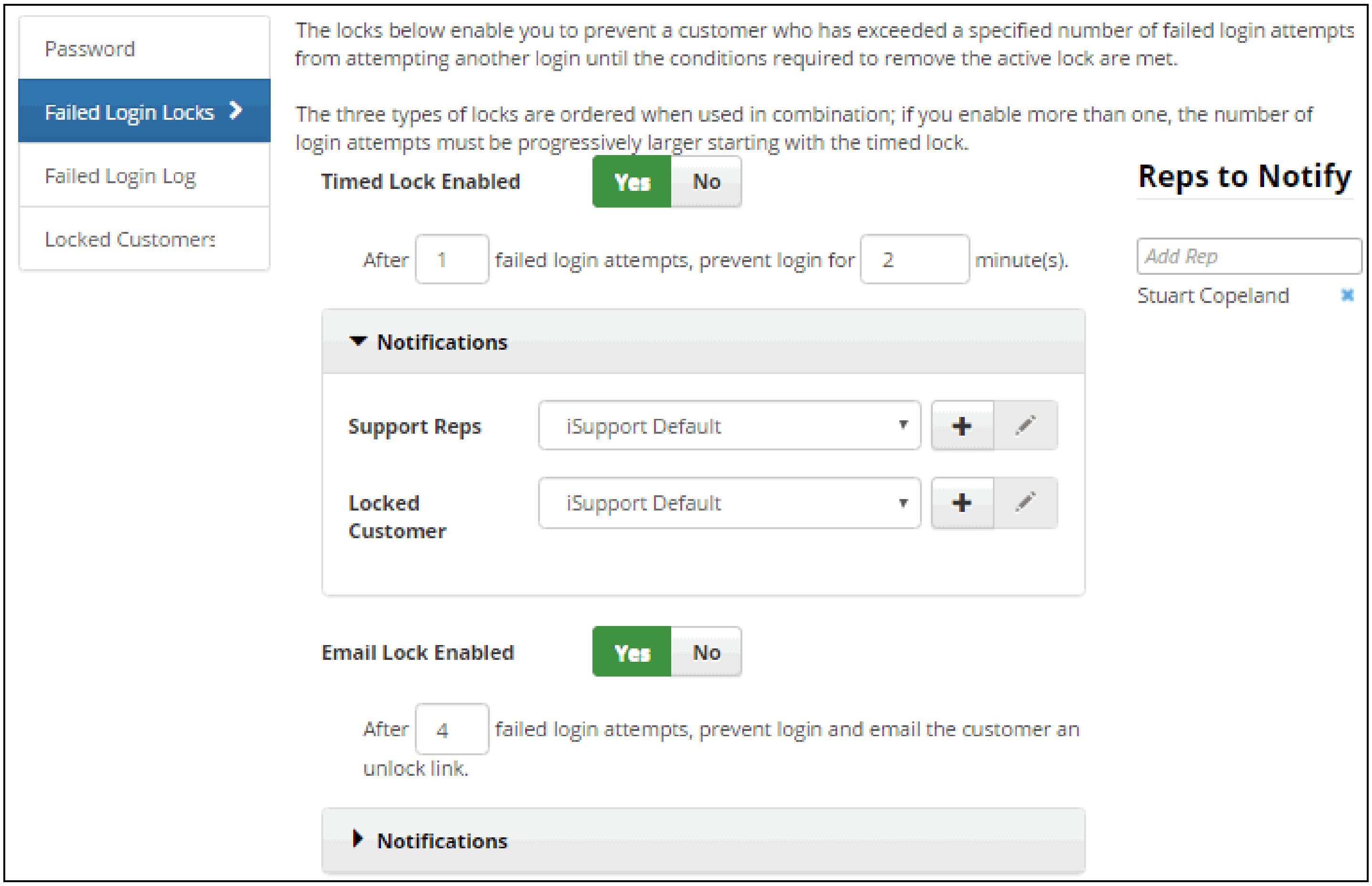
At Least One Uppercase Character - Select Yes to require a customer's newly entered password to contain at least one capital letter.

At Least One Lowercase Character - Select Yes to require a customer's newly entered password to contain at least one small letter.

Force Password Reset for All Customers - Select this button to, for each customer, display the password reset dialog the next time the customer logs in and require a new password to be entered.

Configuring Failed Login Locks

Use the Failed Login Locks tab to configure locks to prevent a customer who has exceeded a specified number of failed login attempts from logging in. You can set a timed lock, an email lock requiring login via a link in an email, or a support rep lock which requires an administrator to reset the login lock.



You can use the Failed Login Log tab to display information on customers who have unsuccessfully attempted a login, and the Locked Customers tab to display those who are locked out due to exceeding the configured number of failed login attempts.

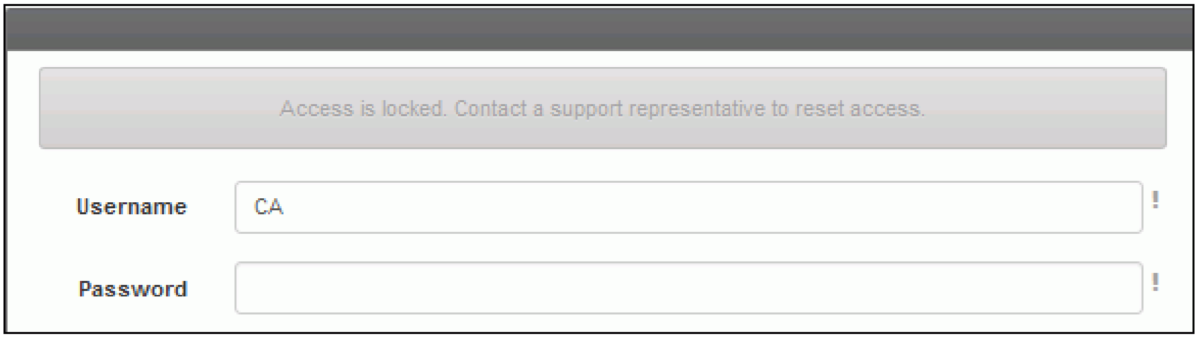
You can send notifications for each type of lock; support representatives selected in the Reps to Notify field will be notified for each notification selected for a lock. These notifications can be customized via the Custom Notifications screen. The three types of locks are ordered when used in combination; if you enable more than one, the number of login attempts must be progressively larger starting with the timed lock.

Email and Timed Locks

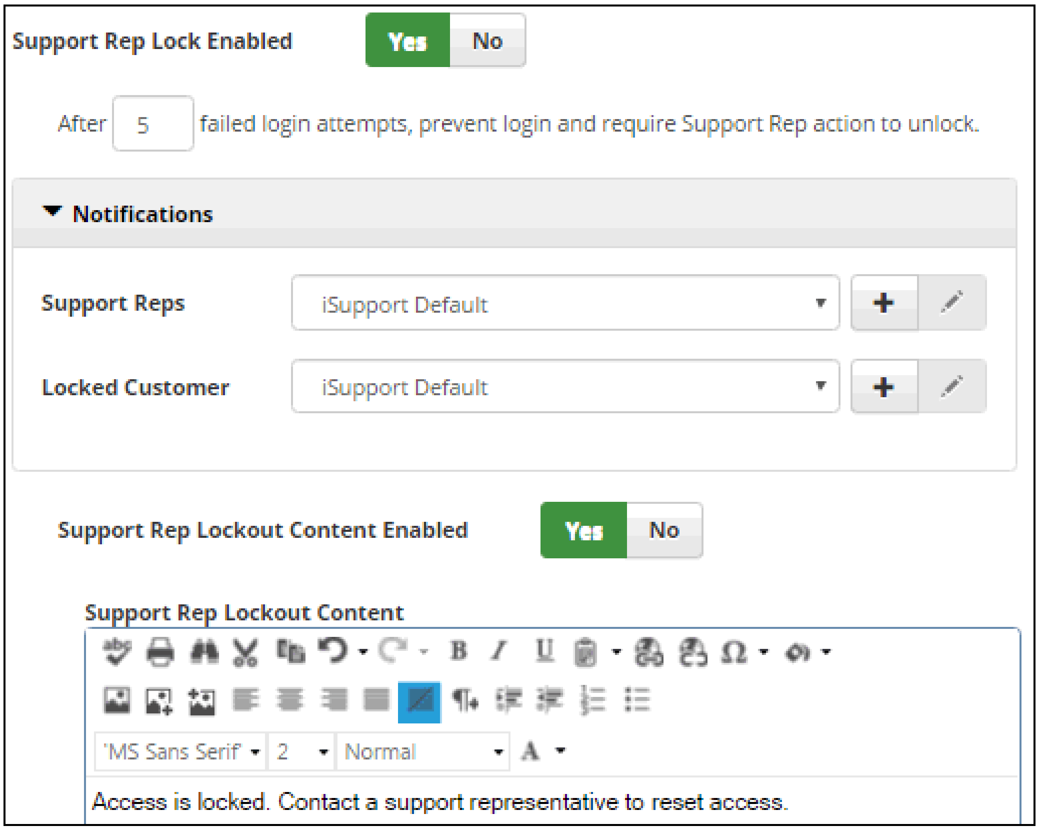
- A **timed lock** prevents login for a specified period of time (the lock would prevail during that time even if the correct login were entered).
- A more restrictive **email lock** displays a message regarding the lock and sends an email to the customer, who must use the link in the email to reconnect to the login page in order to continue. If the customer doesn’t use the link and logs in directly, the lock would prevail even if the correct login were entered.

Support Rep Locks

An even more restrictive **support rep lock** prevents the customer from logging in until a support representative unlocks his/her customer profile. A configurable message will appear to the customer if the configured number of failed login attempts has been exceeded.



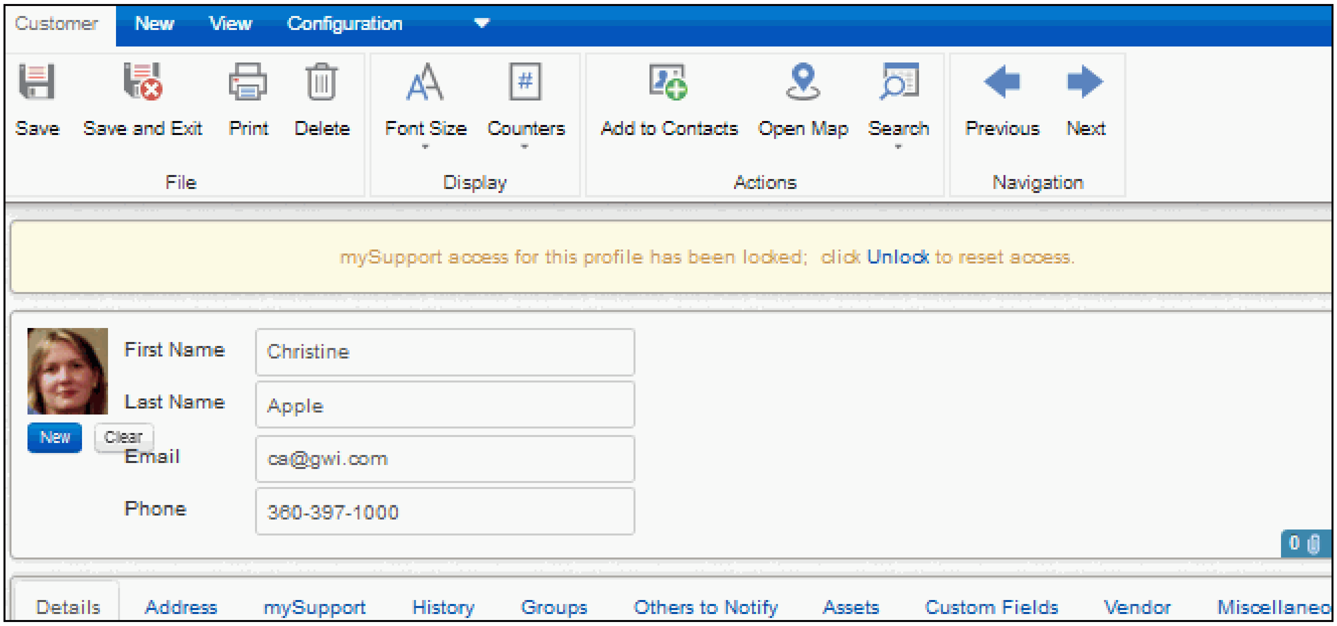
To configure a support rep lock, select Yes in the Support Rep Lock Enabled field, enter the number of failed login attempts, and select notifications to be sent to the support representative and customer if applicable. You can use the Support Rep Lockout Content Enabled and Support Rep Lockout Content fields to configure the content of the message to appear to the customer after the number of failed login attempts has been exceeded.



Support representatives with Customers | Unlock mySupport Access permission can unlock a Customer Profile in the following ways; both will set the failed login attempt count to zero.

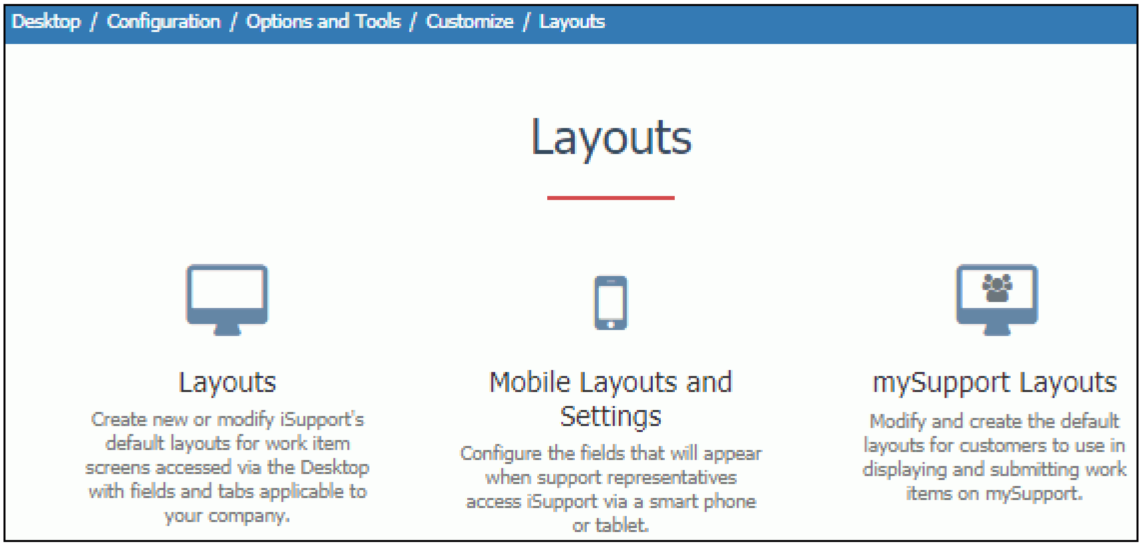
- Select the Unlock Access option on the Actions menu on the Locked Customers tab or Locked Customers view on the Desktop.

- Click the Unlock link that displays in the banner in the Customer Profile screen when a profile is locked.



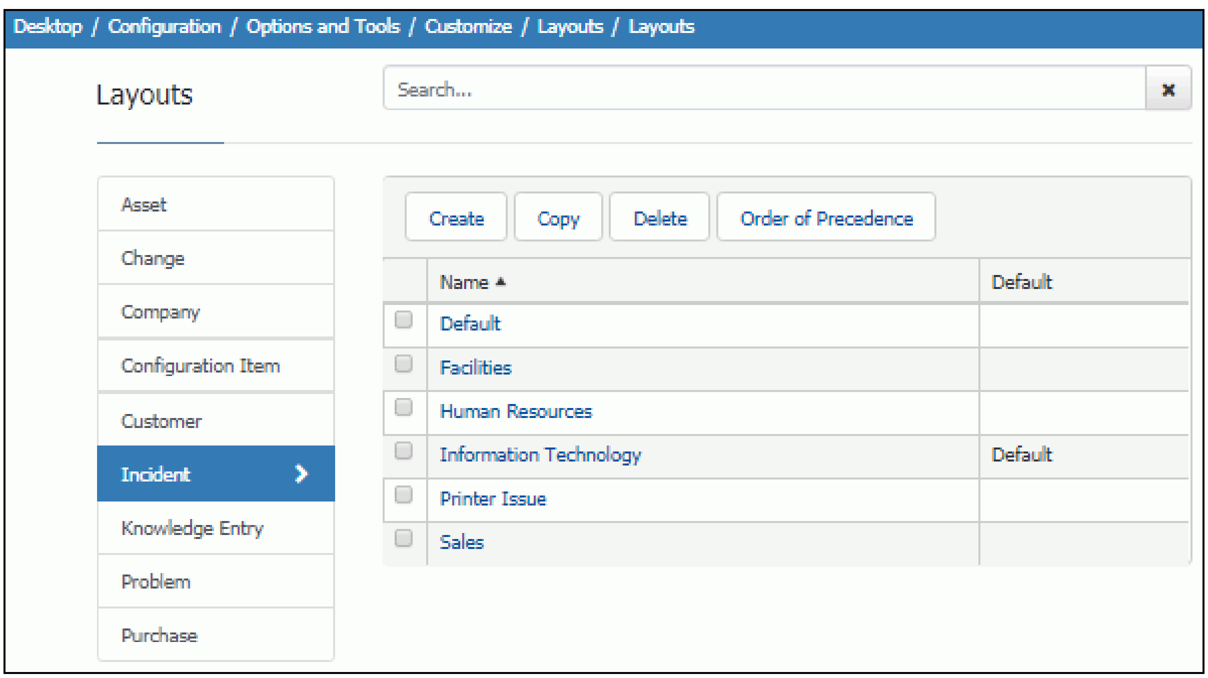
Configuring Screen Layouts

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



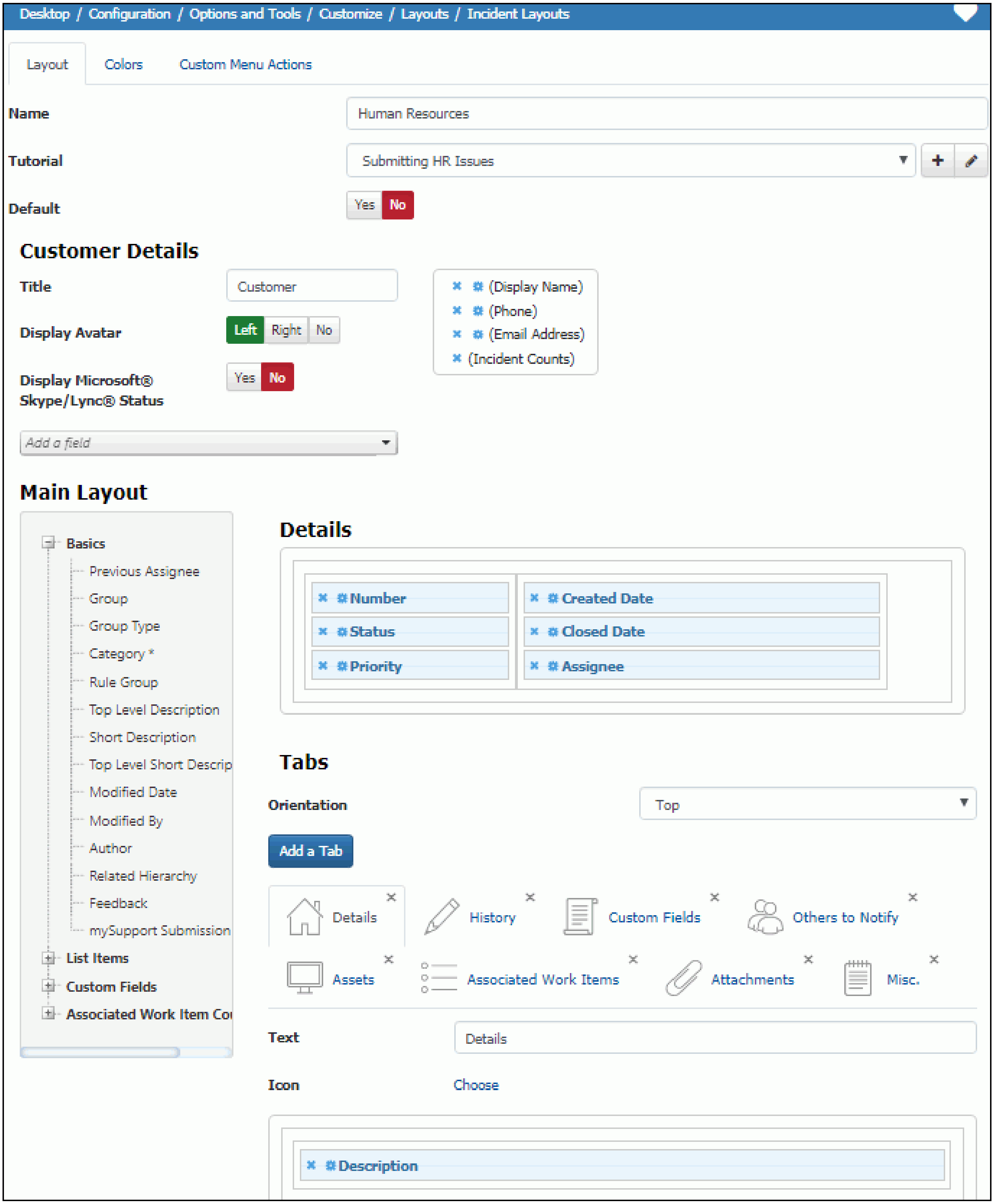
Note that only layouts configured via the Global Settings | Mobile Settings screen will apply to the mobile HTML5 interface. Also, mySupport Customer layouts will appear when the customer selects the View Complete Profile button in the Account Settings screen on a mySupport portal.

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



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

The Layout screen is shown below.



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

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

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

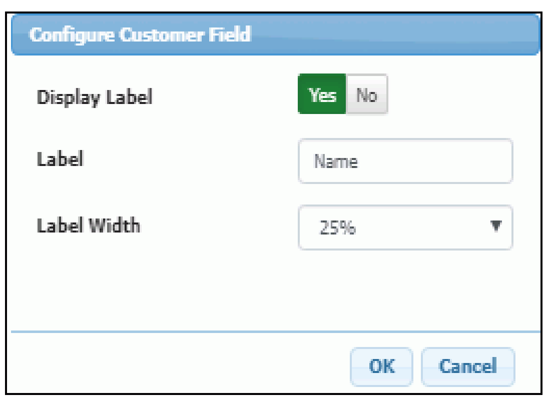
Configuring Customer Details

Rep Incident and Change Screens

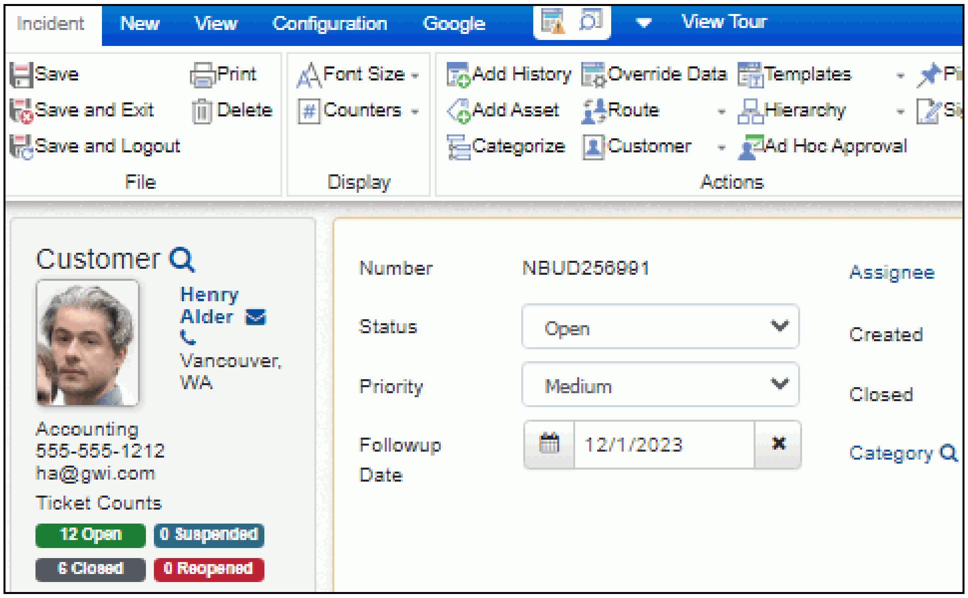
The Customer Details section will appear in the Rep Incident and Change Layout configuration screens as shown below.

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

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



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

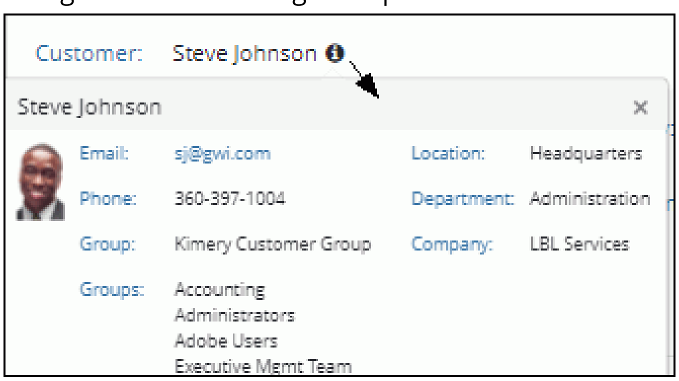


Use the **Display Microsoft® Skype/Lync® Status** field to include an icon that will display the Microsoft Skype/Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Skype/Lync functions. In order for the icon to appear, Microsoft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

mySupport Incident and Change Screens

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

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

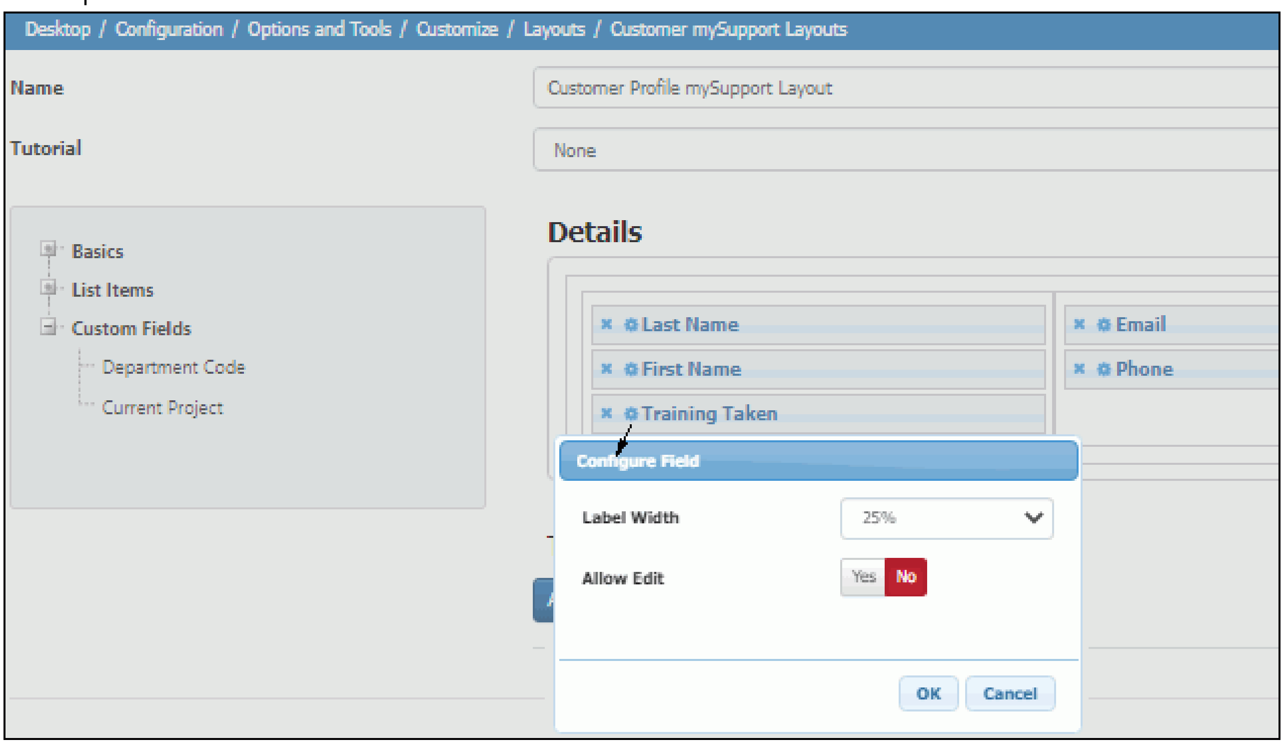


- Individual fields under the Customer Fields section

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

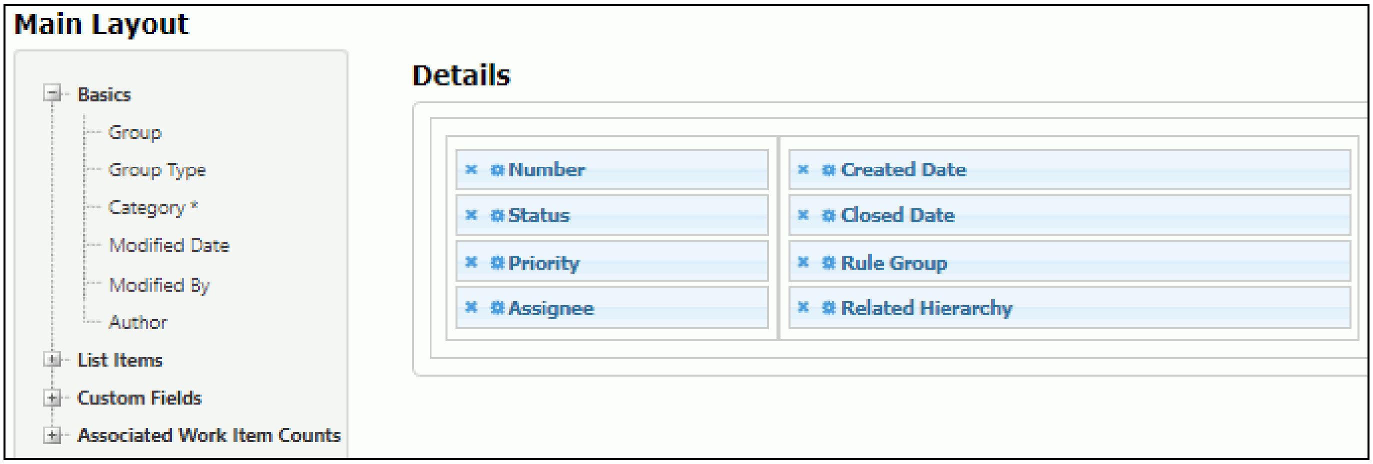
mySupport Customer Profile Custom Field Edit Access

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

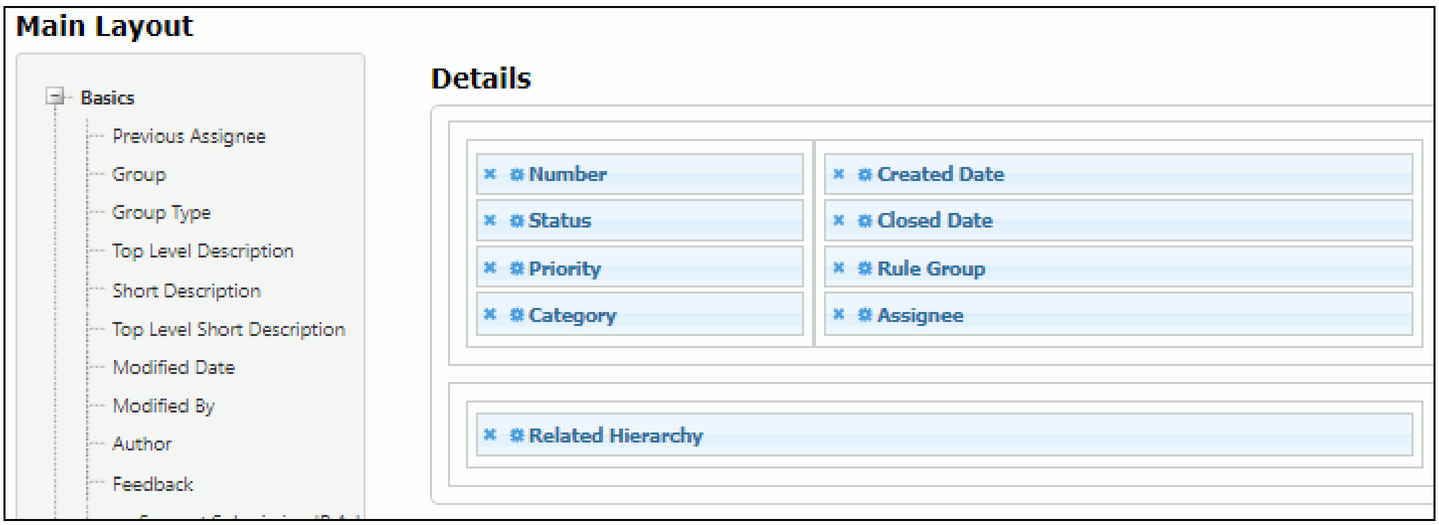


Adding Fields and Tabs

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

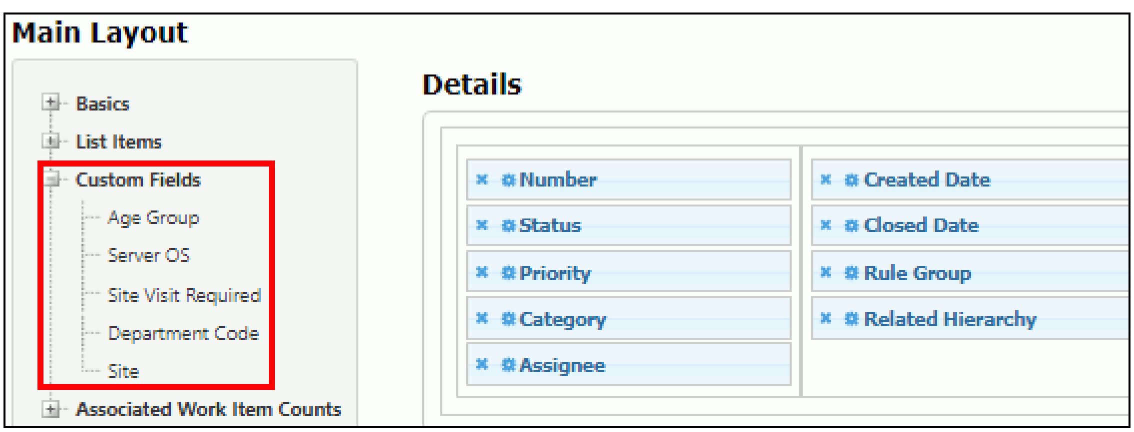


You can drag a field to the lower part of the Details section to create a subsection for a field.

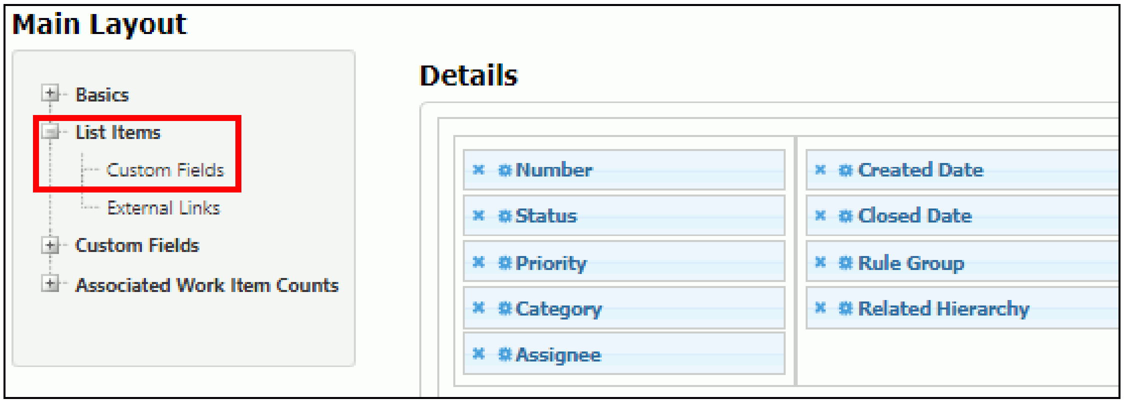


Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, or CI type. To include custom fields on a layout, you can:

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

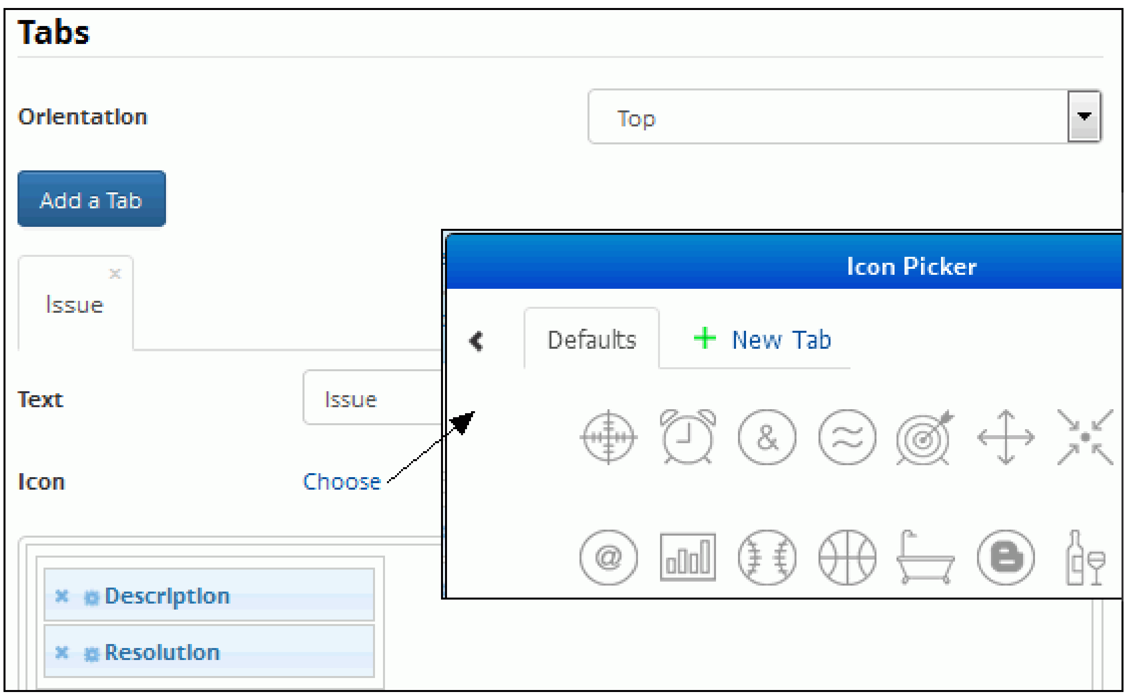


- Drag the Custom Fields field under the List Items section and then select Configure Field to display the Configure Field dialog and select the types of custom fields to include: global custom fields, additionally defined custom fields, or both. See "Configuring Fields" on page 151.

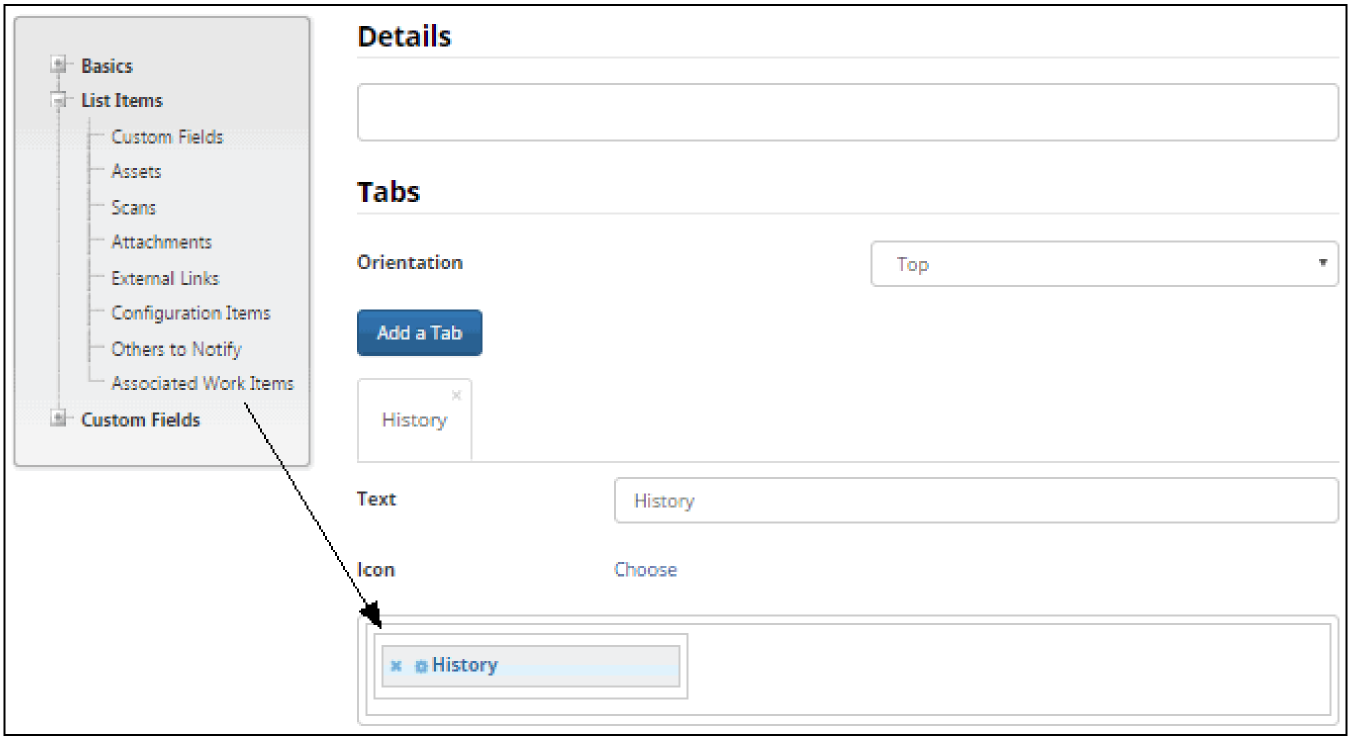


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

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



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

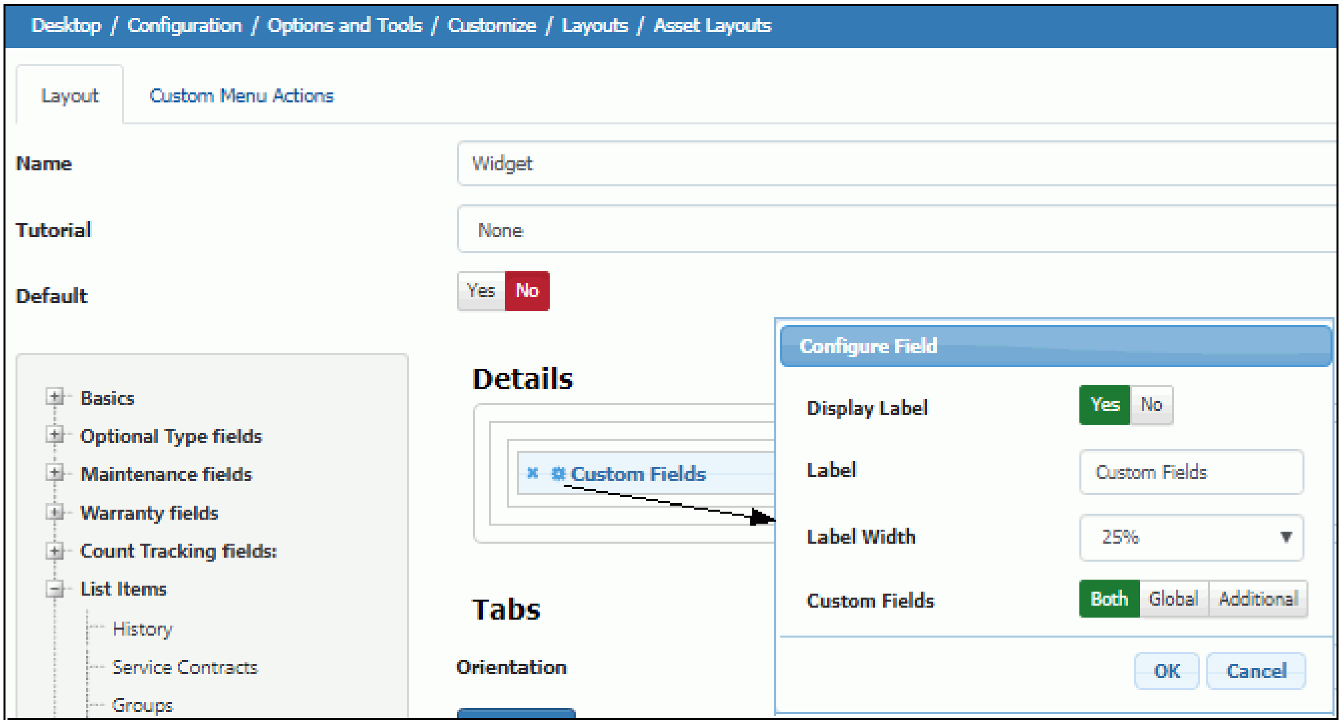


Note: The Description field is optional on mySupport incident submit layouts. The following text will be included in the Description field after submission: "Description field not included in <layout name> mySupport incident submit layout." If the layout is associated with a template, the description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

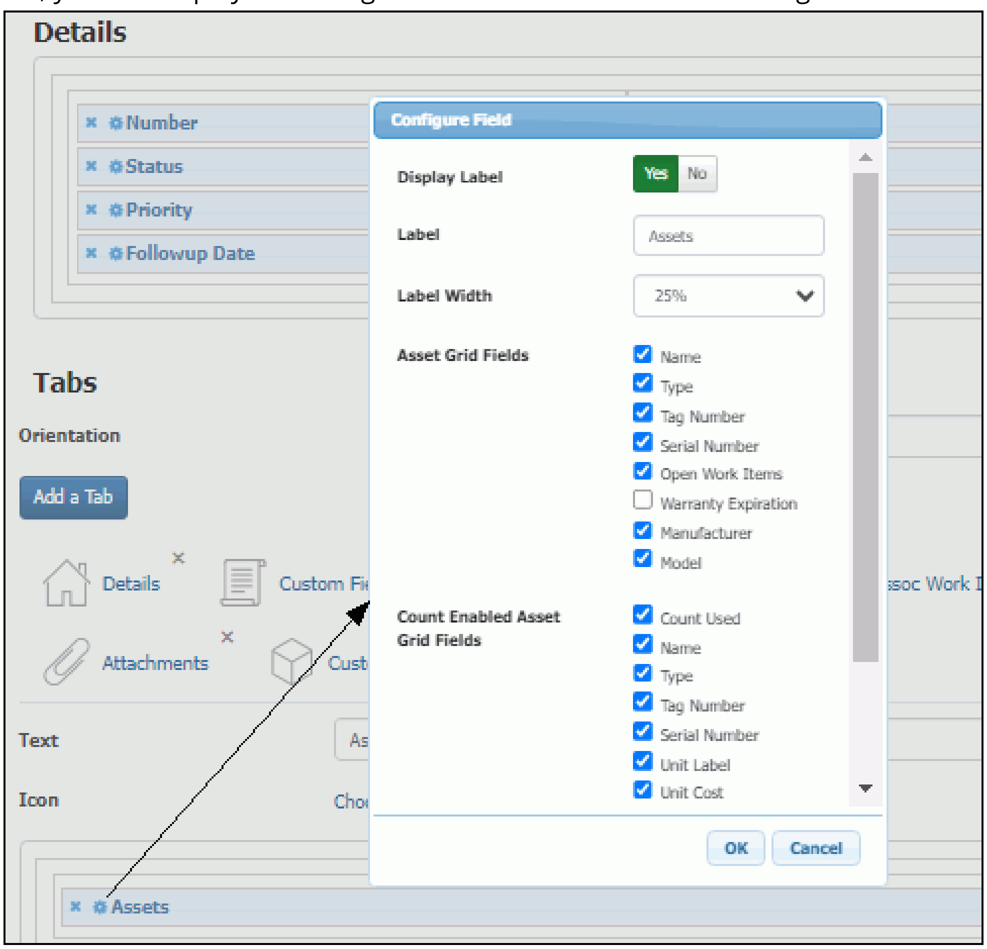
Configuring Fields

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

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

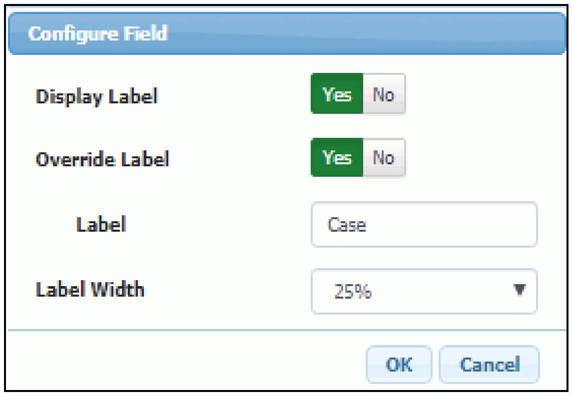


For work item layouts, you can display an asset grid for the Asset field via the Configure Field icon:

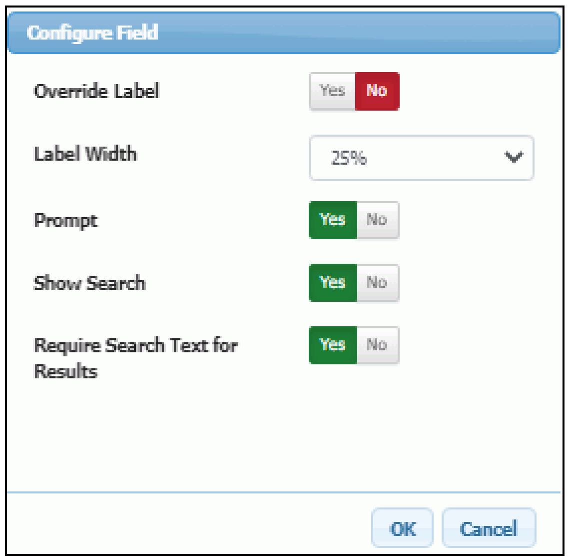


mySupport Layouts

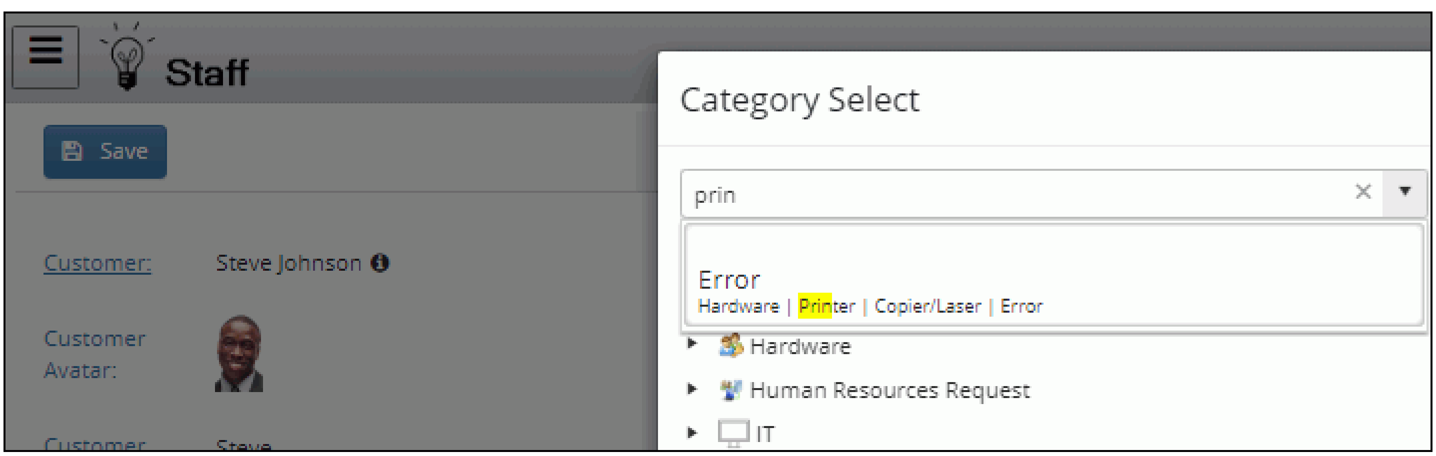
- Select Yes in the **Override Label** field to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



- If configuring the **Category** field:

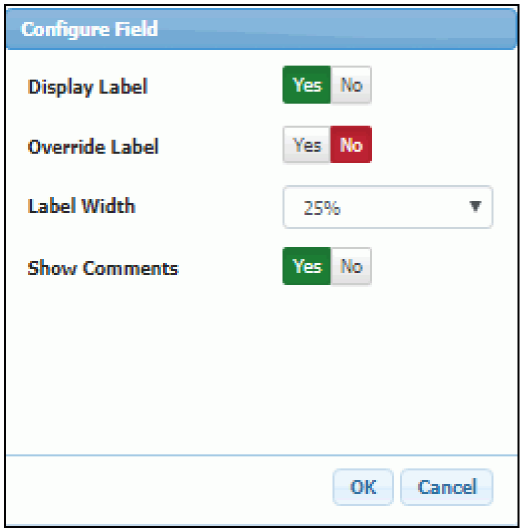


  - Select Yes in the **Prompt** field to initially display the Category Select dialog when the Incident or Change Submit screen appears.
  - Select Yes in the **Show Search** field to include a search field in the Category Select dialog.



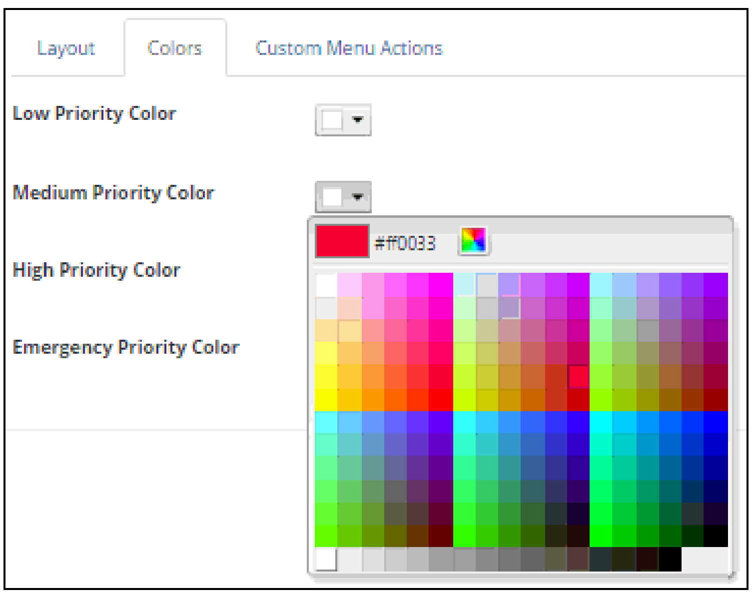
  - Select Yes in the **Require Search Text for Results** field to prevent display of the results until the user has started typing.

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



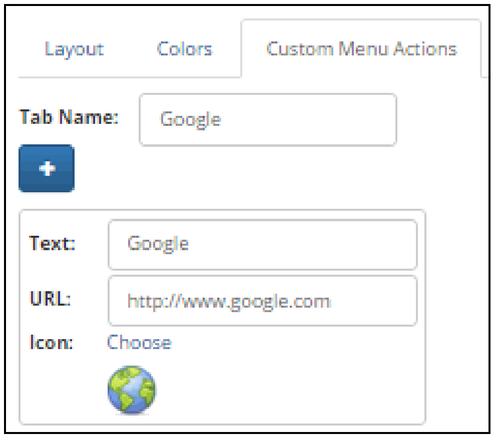
Configuring Priority-Based Background Colors

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

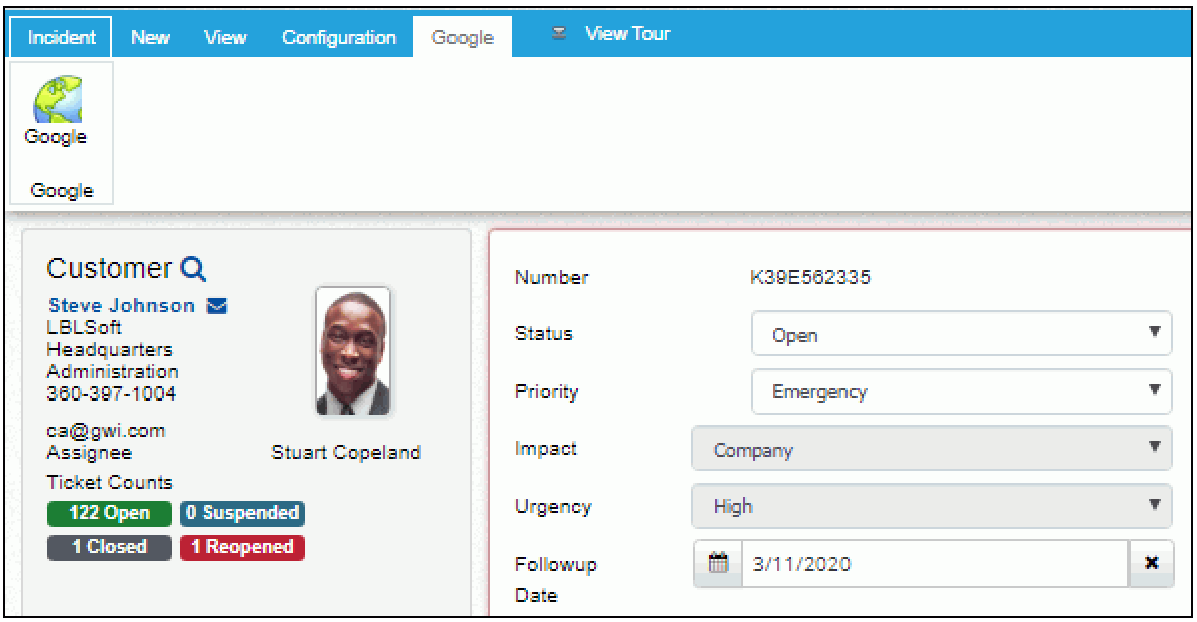


Configuring Custom Menu Actions

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



Example:



Accessing the mySupport Portal on a Mobile Device

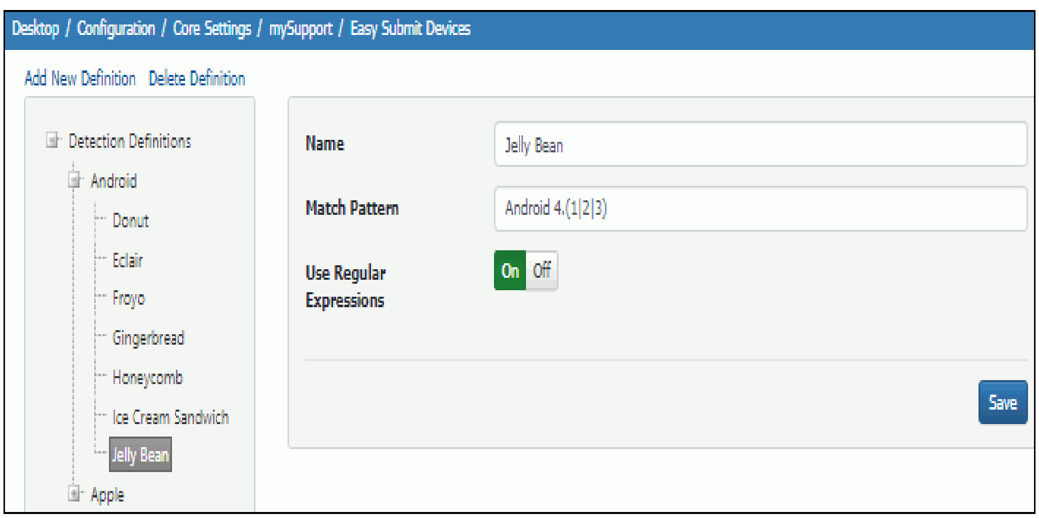
The mySupport portal can be accessed via a mobile device; you can create a mySupport Options set for mobile devices and assign it to a customer, company, or customer group. You can also create different display and submit layouts for work item functionality on a set of mySupport portal options via the mySupport Layout links included for each module (incident, knowledge, problem, change, purchase, and service contract).

Use the Default Mobile mySupport Options field in the mySupport Portals configuration screen to select the options to appear when this mySupport URL is accessed by a smart phone (iOS, Android, or Blackberry) or tablet if a customer has not logged in or if none are assigned to the customer's profile, customer's primary company profile, or primary group profile.

Configuring Easy Submit Functionality

Use iSupport's Easy Submit functionality to enable customers to use an older version of a device that cannot render HTML5 to submit incidents. The interface contains a Description field and fields required for authentication.

iSupport's Easy Submit functionality utilizes the browser's user agent string, which identifies the browser version and other device details. Definitions in the Easy Submit Device Settings screen identify the user agent string for the device(s) to detect.



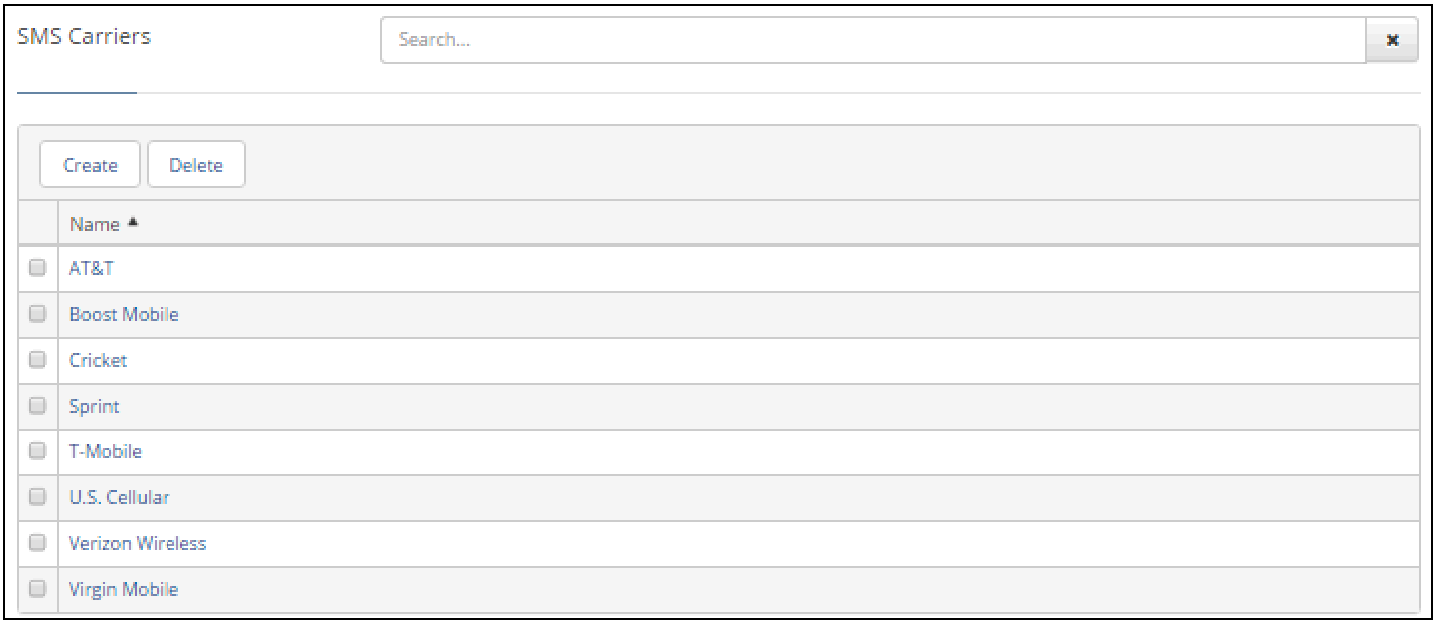
Definitions for some common device/browser user agent strings are included by default; see http://user-agent-string.info/list-of-ua for a list of user agent strings for other device browsers. These definitions will be available for selection in the mySupport Portal screen so you can target the devices for display of the Easy Submit interface.

Match Pattern - enter the portions of the user agent string to be searched for a match; you can use expression language with syntax such as parenthesis () to group parameters, a pipe (|) for an OR condition, or brackets [ ] for a character match.

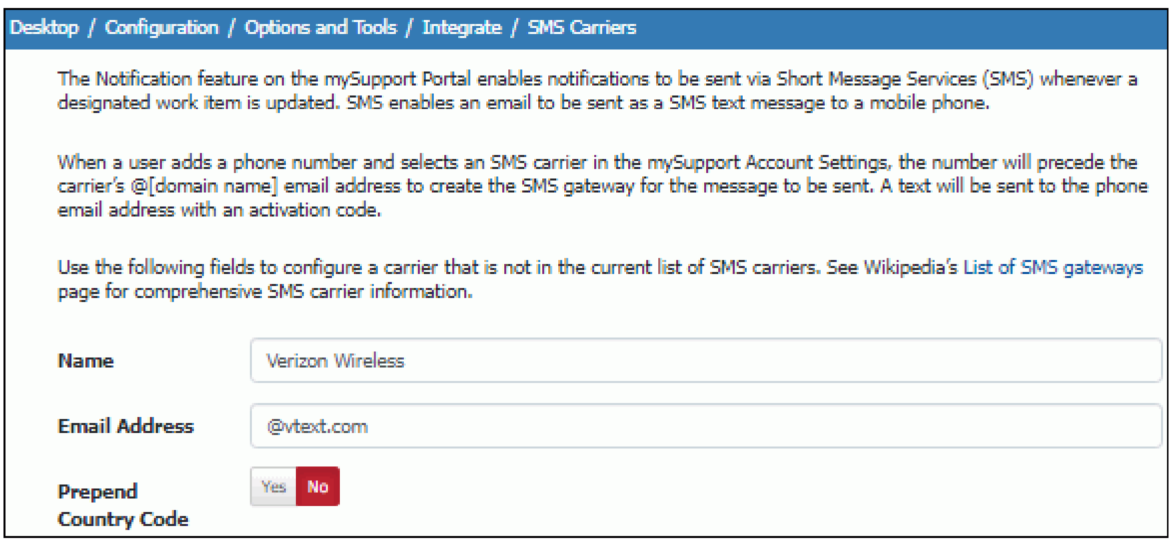
Use Regular Expressions - select On to evaluate the conditions in the Match Pattern and display the Easy Submit interface if the conditions are true. In the example above, the Easy Submit interface will display for an Android version 4.1, 4.2, or 4.3.

Configuring SMS Carriers

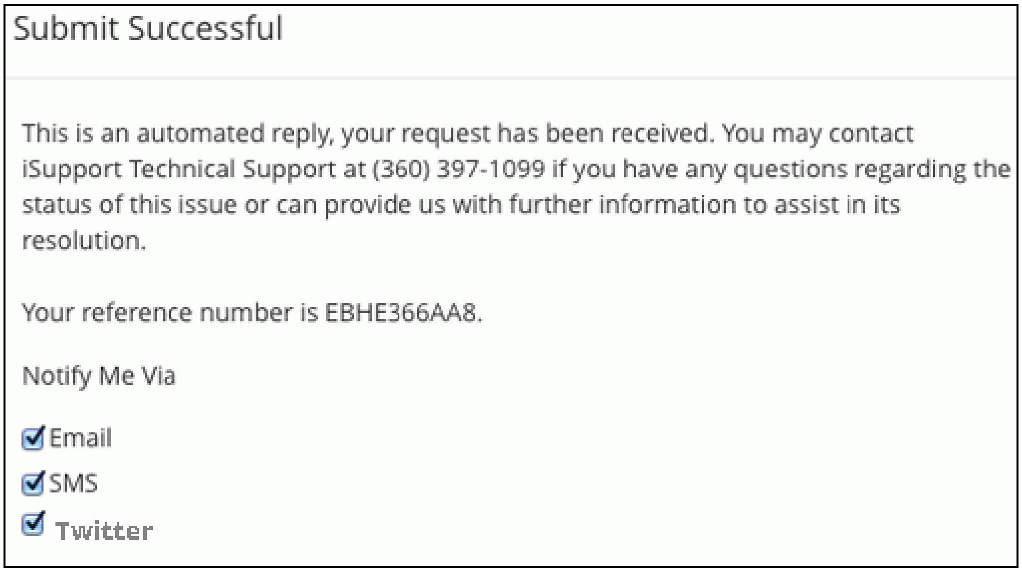
SMS (Short Message Services) carriers are used for sending iSupport notifications and authentication codes to support representatives and customers via SMS. Support representative phone numbers, SMS carriers, and alternate email addresses are included in their Profile record; customers can use the Notifications section in Account Settings to enter their phone and SMS carrier.



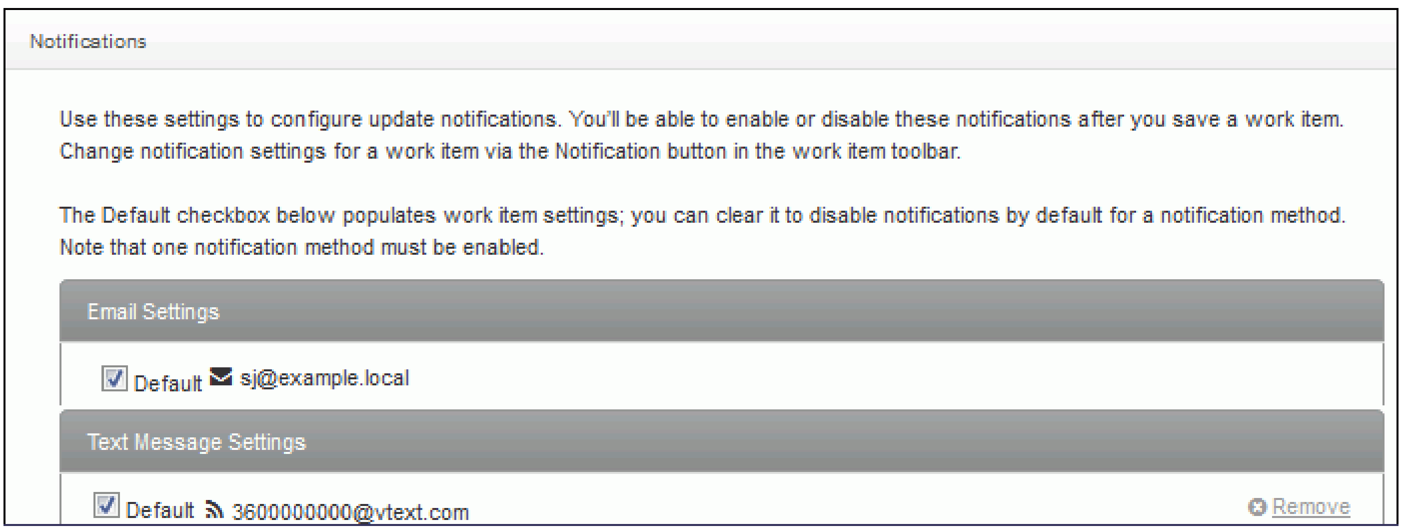
Go to Options and Tools | Integrate | SMS Carriers to configure a carrier that is not in the current list of SMS carriers for selection. When the Prepend Country Code field is enabled, the country code will precede the mobile number in SMS messages generated using mobile number and SMS carrier.



As shown in the dialogs below, customers can enable or disable notifications for a work item after saving, and change notification settings for an existing work item via the Notification button in the work item toolbar.



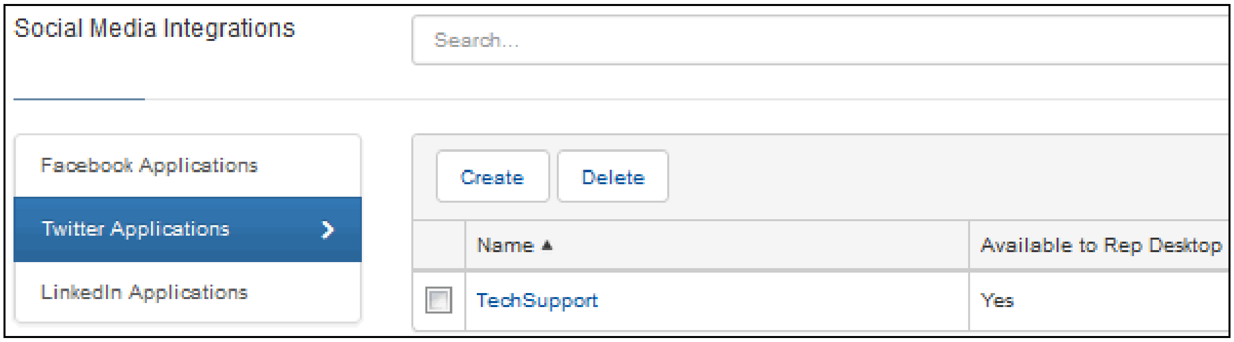
In the Notifications settings, customers configure the phone number to which the notification should be sent. When a user adds a phone number and selects an SMS carrier in the mySupport Account Settings dialog, the number will precede the carrier's @<*domain name*> email address to create the SMS gateway for the message to be sent. A text will be sent to the phone email address with an activation code. Note that you can prevent the Text Message Settings section from appearing in the Account Settings dialog by selecting No in the SMS Enabled field in the mySupport Options screen.



The Default checkbox will populate the work item notification settings. Customers can prevent all text notifications by deselecting Default under Text Message Settings, or prevent text notifications for a work item by deselecting SMS via the Notifications button in a work item.

Configuring Social Media Integration

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



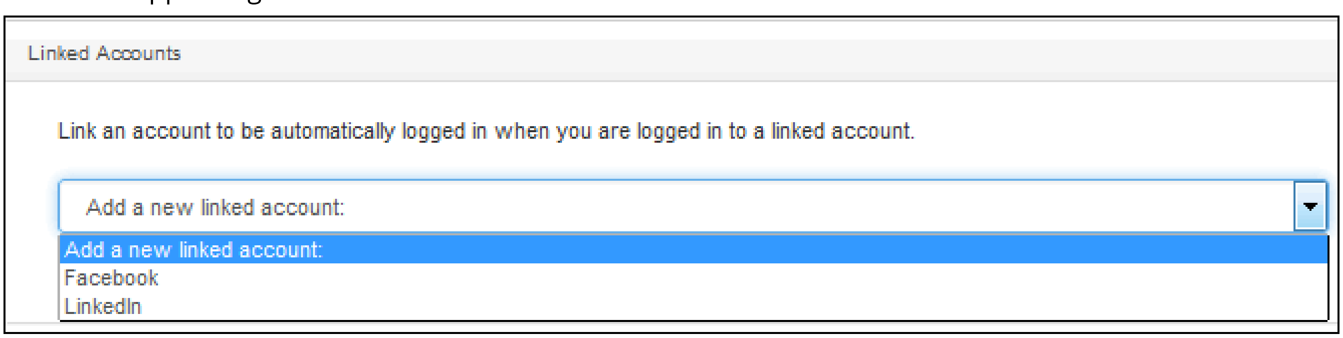
- **Facebook Applications** - Customers can link to and authenticate to the mySupport portal via a Facebook account; use the Facebook Applications tab to configure an application for this functionality. See "Facebook Applications" on page 161.
- **Twitter Applications** - A Twitter account and application must be configured in iSupport in order to use the Twitter and Twitter Monitor Desktop components, publish headlines and problems to Twitter, and send customer notifications regarding work item updates via Twitter. See "Twitter Applications" on page 163.
- **Linked In Applications** - Customers can link to and authenticate to the mySupport portal via a LinkedIn account; use the LinkedIn Applications tab to configure an application for this functionality. See "LinkedIn Applications" on page 165.

Note: iSupport utilizes or integrates with a number of third party applications and resources; changes in these external applications and resources may have a negative impact on functionality in iSupport. Depending on the nature and degree of the change, iSupport will, at its discretion, revise the current version of iSupport or make a corrective change in a future release of iSupport.

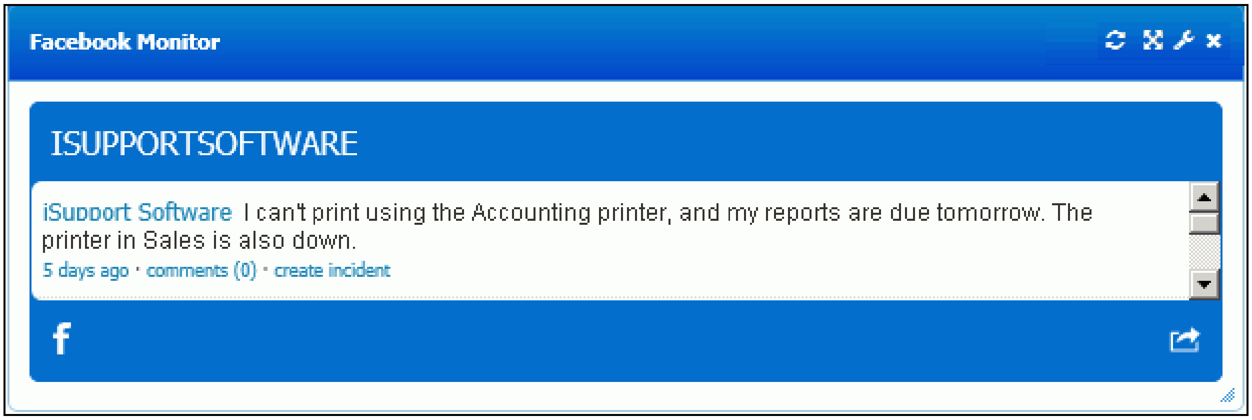
Facebook Applications

Configure a Facebook application to enable:

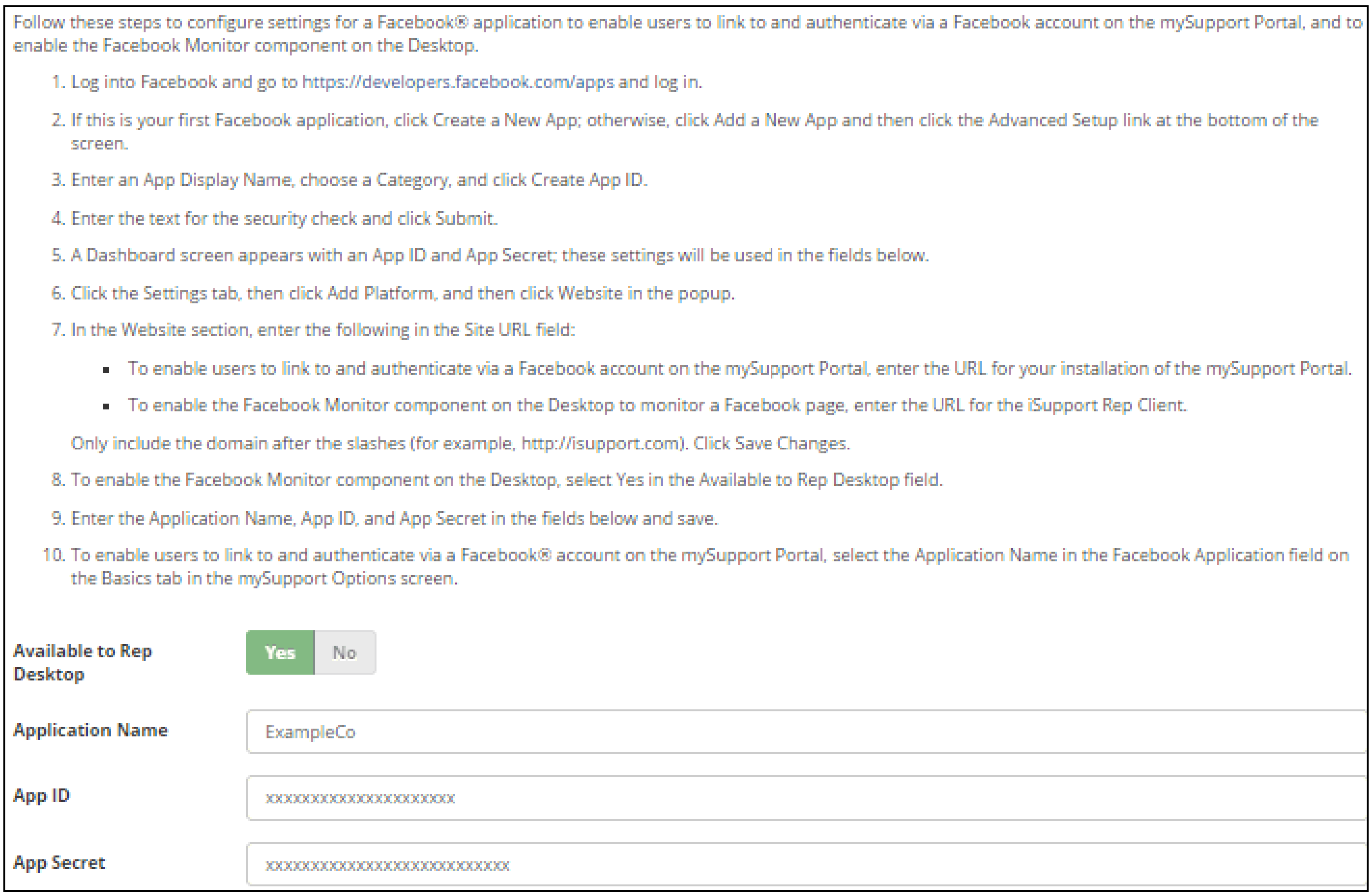
- Customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via Facebook; if the customer is logged into Facebook, the customer will not need to enter an iSupport login.



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



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



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

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

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

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

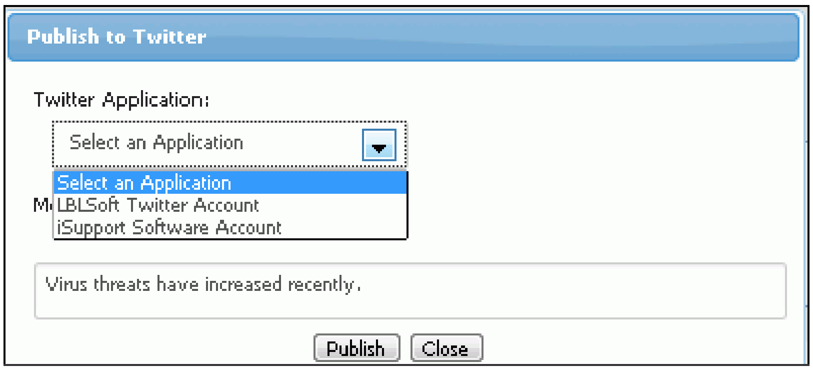
After completing the Application Name, App ID, and App Secret fields:

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

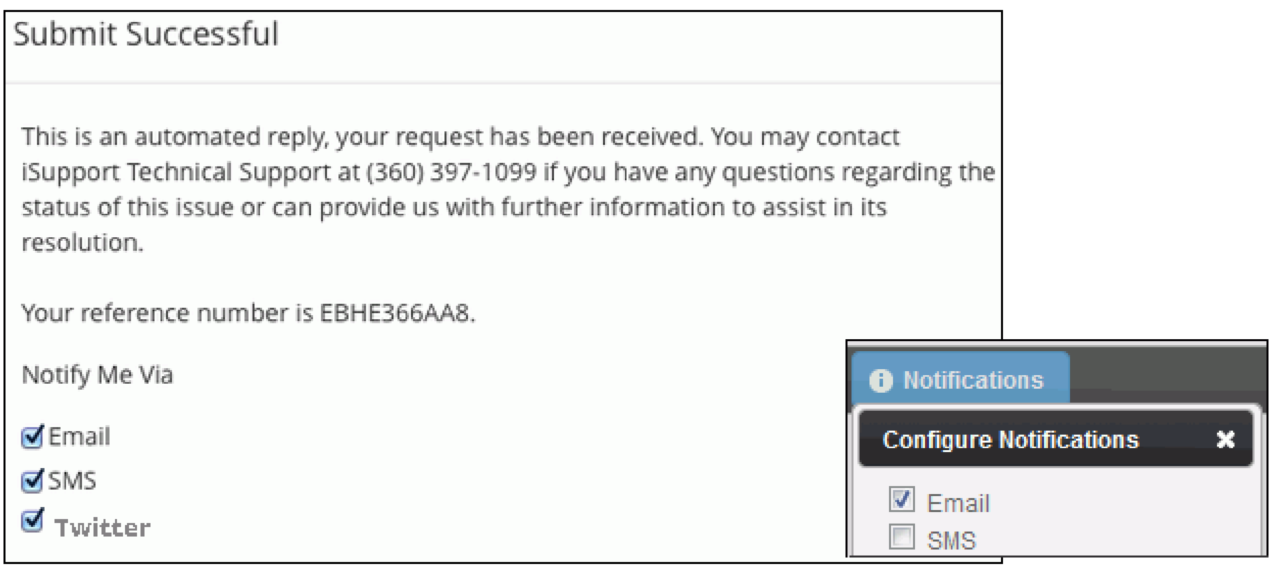
Twitter Applications

A Twitter account and application must be configured in iSupport in order to use the following features. To get started with creating a Twitter application, see “Configuring a Twitter Application” on page 164.

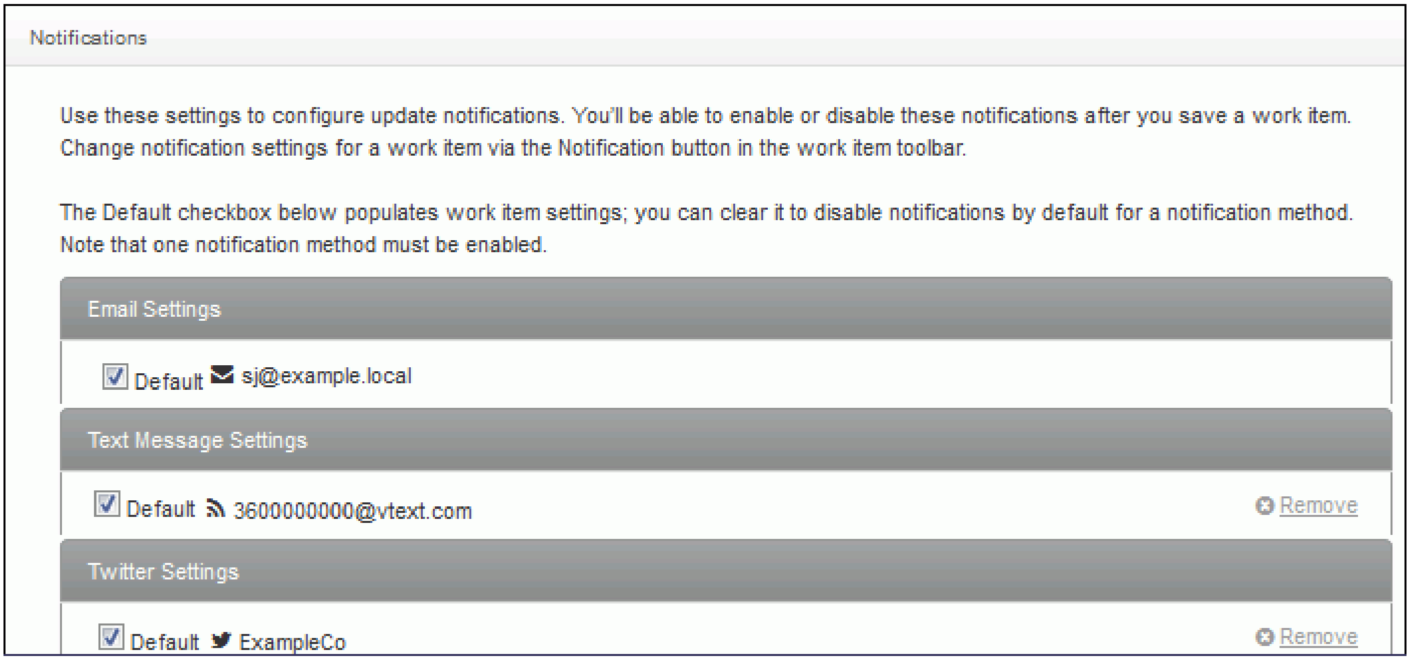
- Use the Twitter component display a Twitter feed for a specified Twitter username.
- Use the Twitter Monitor component to search Twitter feeds and display tweets that include a specified search term. You can use the Reply link to reply to tweets directly from iSupport, or use the Create Incident link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



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

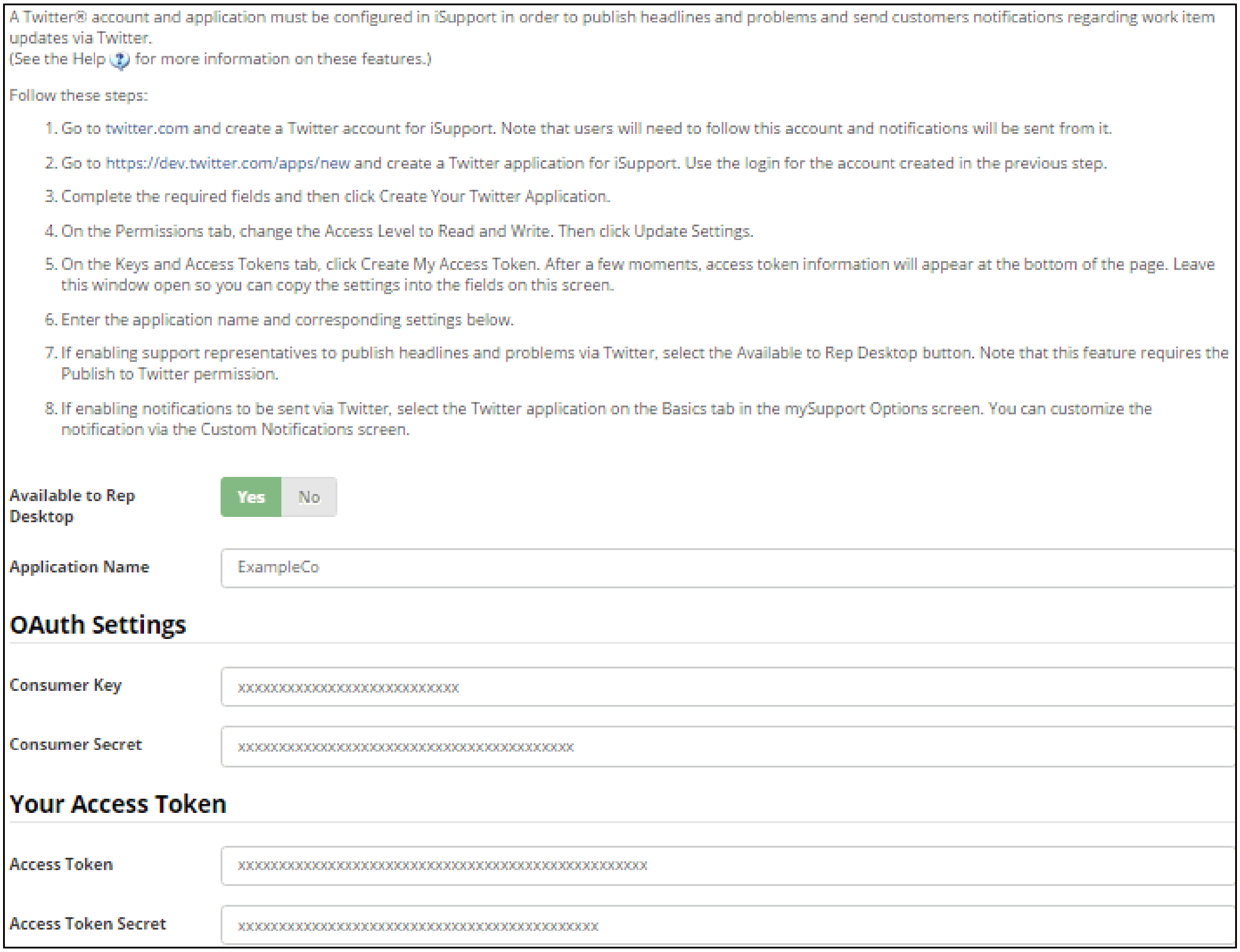


Customers configure the Twitter account to which the notification should be sent in the Notifications settings. The user needs to be following the account associated with the Twitter application specified in configuration; this account will be listed in the dialog prompting for the activation code.



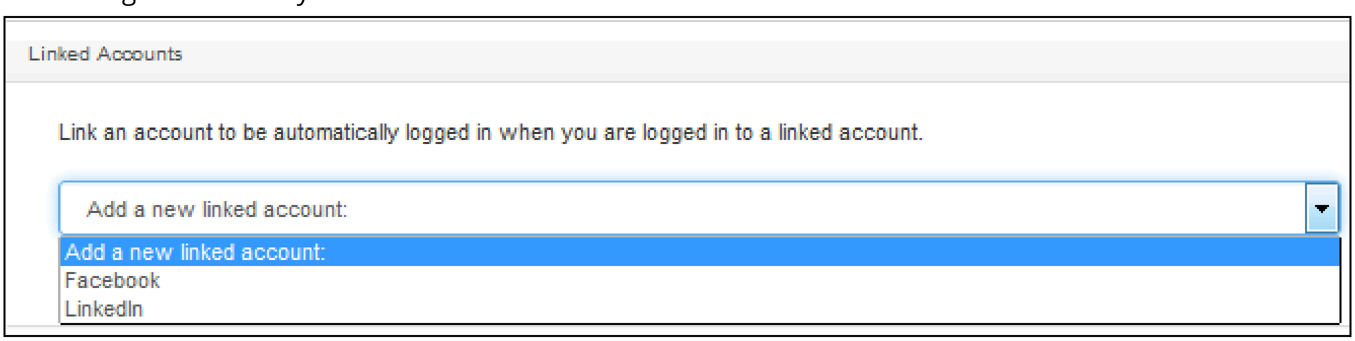
Configuring a Twitter Application

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



LinkedIn Applications

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



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