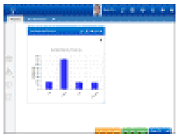
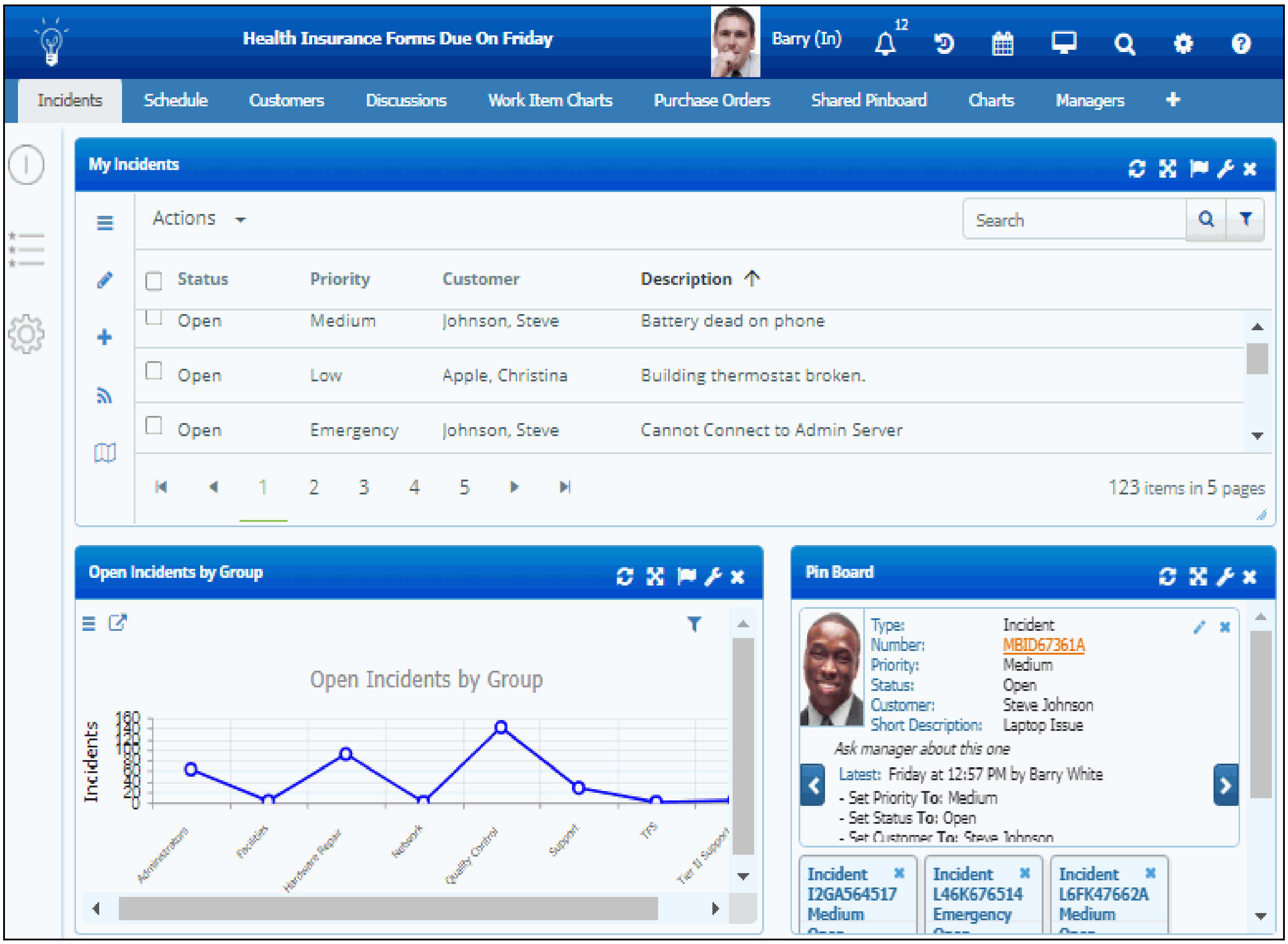


Using the iSupport® Desktop

Overview

The iSupport Desktop provides access to all iSupport functionality, including customizable personal and shared dashboards with components for viewing and monitoring iSupport data, configuration access, and more.



- Select the **Create menu** option to access to all of iSupport's entry screens. See the next section for more information.
- Use the **icons on the top right** to set preferences, display desktop notifications, search, and access the configuration module and help, and more; see "Using Desktop Header Icons" on page 3 and "Setting Preferences" on page 57.
- **Chat with customers and other support representatives.** See "Using Chat" on page 7.
- Add and name **dashboards** and include **components** for viewing, reporting, and monitoring iSupport functionality. See "Working With Dashboards" on page 13 and "Adding and Using Components" on page 16 for more information.

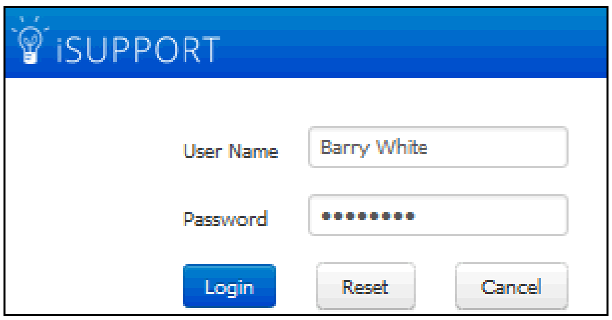
- Add **quick access icons for commonly used actions**. See "Configuring the Desktop Quick Access Section" on page 61.
- Access **Preferences** on the Profile menu for setting options for your calendar, notifications, quick access icons, views, signature block, personal rules and correspondence, and more. See "Setting Preferences" on page 57.
- Administrators can configure the following **desktop settings**: dashboard element colors, header text, available Desktop components, and the record types/features involved in global searches performed by all support representatives. See "Configuring iSupport Desktop Settings" on page 67.

Note: Functionality may not appear for support representatives if permissions are enabled in the Configuration module.

Authentication (Logging In and Out)

Methods for authenticating to the iSupport Desktop include:

- **iSupport's application login.** Your user name and password are set up in your Support Representative Profile record, and you can change your password via the Preferences option. 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 can be configured via the Rep Security screen in the Configuration module. You can also force a password reset for all support representatives and enter text to appear at the bottom of the login dialog.In the Login dialog, use the Reset button to clear the User Name and Password fields.



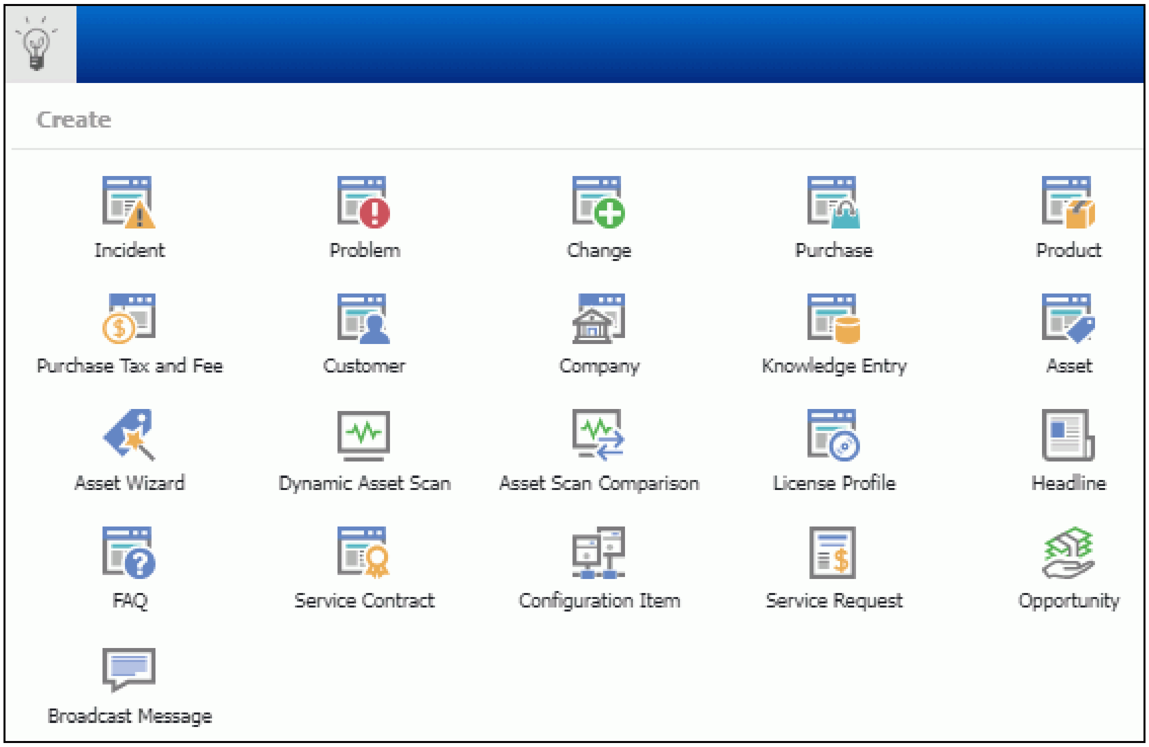
  Note: The Password field in the Login dialog is case sensitive. Selecting Out will exclude (for routing purposes) a support representative from all of the groups in which the support representative is assigned. However, it will not prevent assignment if a support representative is the default owner of incidents submitted via a mySupport portal, an incident or change (if enabled) template, or email-submitted incidents.

- **Microsoft® Windows-based authentication** which enables support representatives to bypass the Login prompt for accessing the Desktop. It will apply to all support representatives. See "Setting Up Microsoft Windows-Based Authentication for the Desktop" on page 69 for more information.
- **Single sign on integration.** Administrators can use the Options and Tools| Integrate | Single Sign On Integrations screen to enable a third party application (such as Shibboleth and Otka) to pass user credentials so that a user can sign in to mySupport or the iSupport Desktop with the same credentials that they use to log into other applications. See "Setting Up Single Sign On Authentication for the Desktop" on page 70 for more information.
- **CAPTCHA**. Login-related dialogs will include a CAPTCHA image with a code that the user will be required to enter after logging in, for access to the Rep Desktop.
- **Multi-factor authentication.** An authentication code to be sent to a support representative after login in order to access iSupport.

If you are not using Microsoft® Windows-based authentication with iSupport, administrators can use the Options and Tools | Administer | Rep Security configuration screen to enable password security options, enter text for the login screen, and configure locks to prevent a support representative who has exceeded a specified number of failed login attempts from logging in. See the online help for more information.

Using the Create Menu

Use the Create menu option to create work items, start an asset scan or scan comparison, and send a broadcast message. Note that if you don't have permissions to access functionality, its icon will not appear. The Problem, Purchase, Product, Change, Service Request, Service Contract, Configuration Item, and Opportunity options only appear if you have the Service Desk edition.

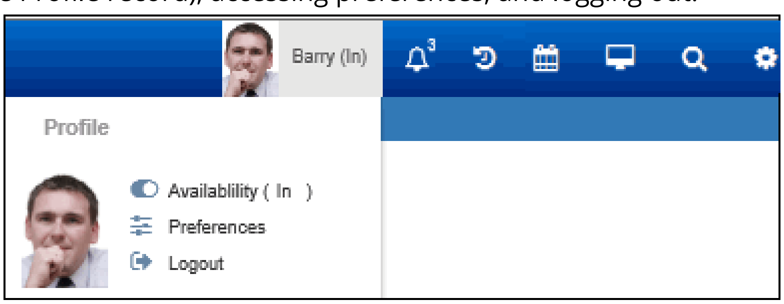


See "Adding and Using Components" on page 16 for more information.

Using Desktop Header Icons

Use the icons to the right of the Desktop header to do the following:

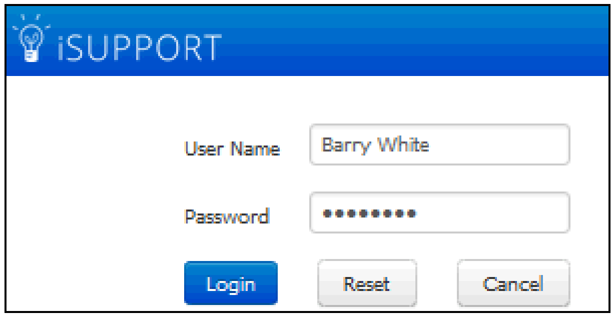
- Select your **Profile** avatar to display a menu containing links for changing your availability (if enabled in your Support Representative Profile record), accessing preferences, and logging out.



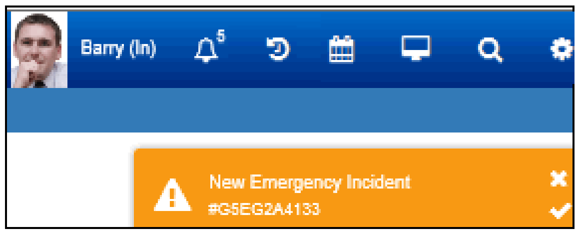
Click the **Availability** option to check in and out for routing of incidents (and problems and changes if enabled). Note that selecting Out will exclude (for routing purposes) you from all of the groups in which you are assigned. However, it will not prevent assignment of incidents if you are the default assignee of incidents/problems/changes submitted via the mySupport portal, an incident or change template, or email-submitted incidents and changes.

Select **Preferences** to set personal options for using iSupport; see "Setting Preferences" on page 57.

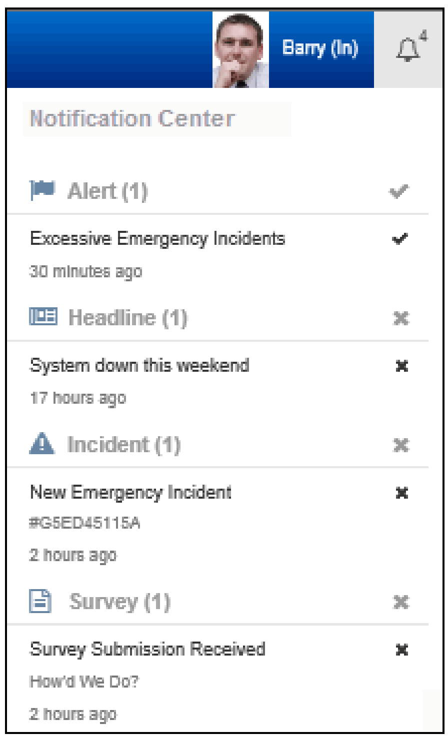
Use the **Logout** option on the Desktop menu to log off of the Desktop and display the iSupport Login screen.



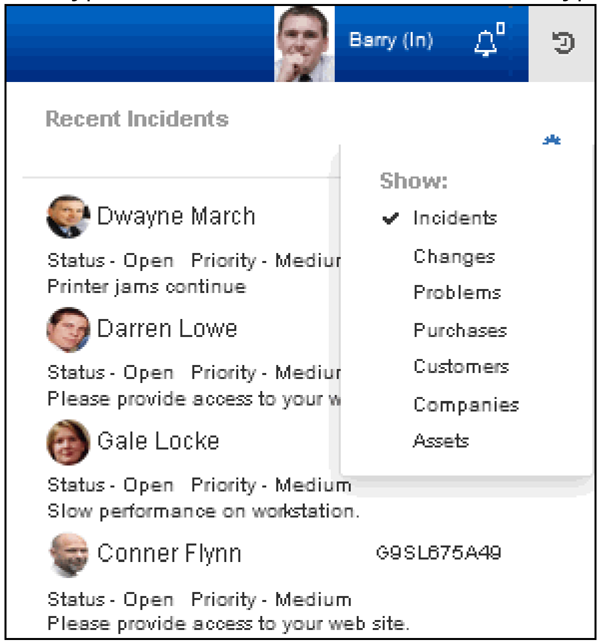
- Use the **Notification Center** option to display a list of notifications configured via the Rules, Alert Designer, and Headline screens. Options on the Desktop Notification Center tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry; see "Setting Preferences" on page 57. An example of a desktop notification popup is shown below:



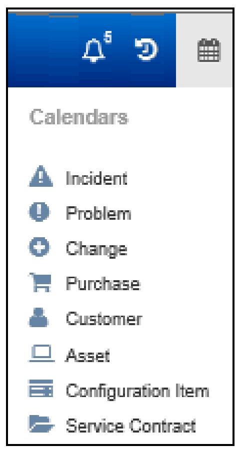
An example of the dropdown is shown below.



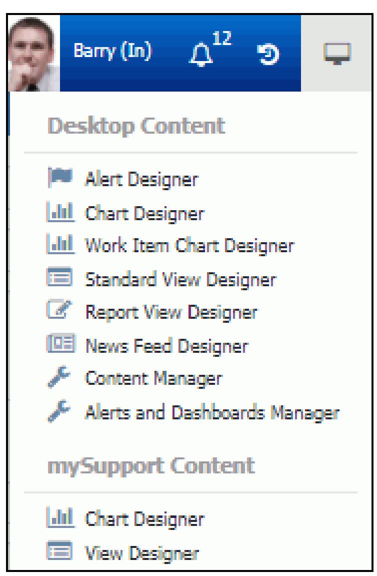
- Select Recent Items (next to the Notification Center) to access a drop-down list of the ten most recently accessed work items of a specified type; use the Show icon to select the type of work item to display in the list.



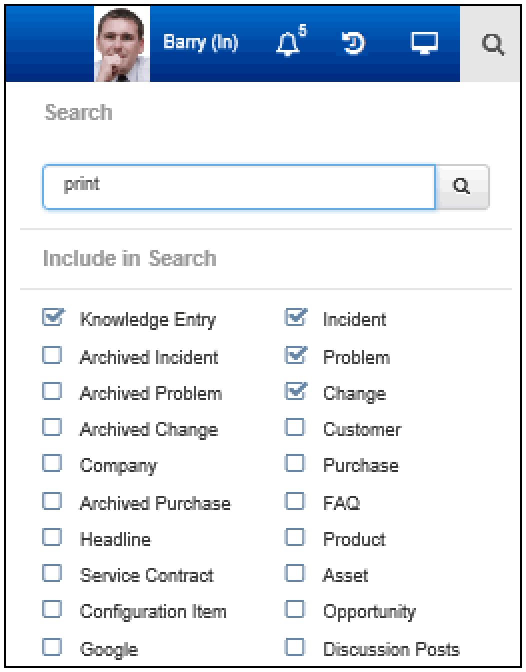
- **Calendars** will appear if Microsoft Office Outlook Calendar and/or Google Calendar Integration is enabled; you can select calendars with meetings scheduled via iSupport entry screens for work items.



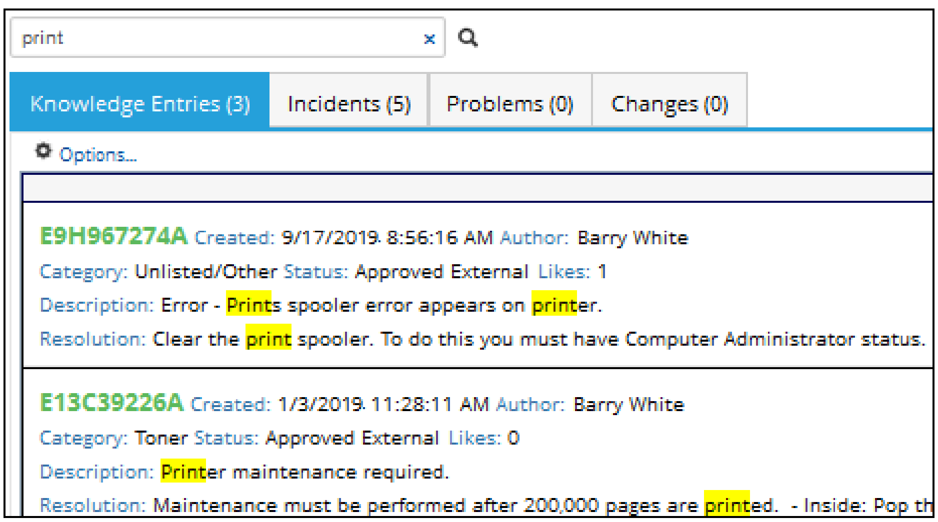
- Select **Desktop Content** to configure and manage views, charts, news feeds, and alerts. See the online help for more information on all of these options.



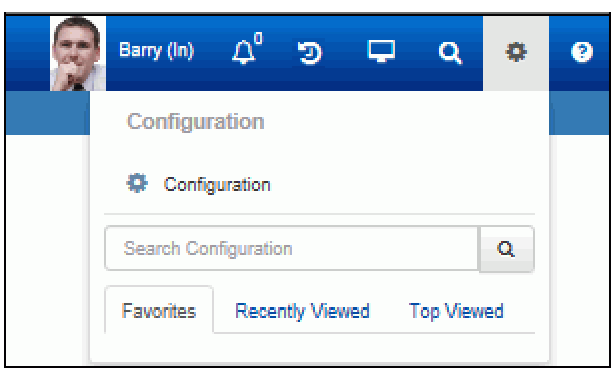
- Select **Search** to search iSupport data using keywords and, if searching knowledge, Boolean operators (And, Or, Not as well as parenthesis to group words and phrases). After entering the search text, select the types of records to search and then select the option to initiate the search. Google can be included if configured in the Google Integration screen.



Search results will appear as in the example below. Use the Options link on each tab to select the fields to search, the type of search (Starts With, Contains, Ends With and Is), enable text highlighting, and select the type of view in which search results are displayed (list or classic).

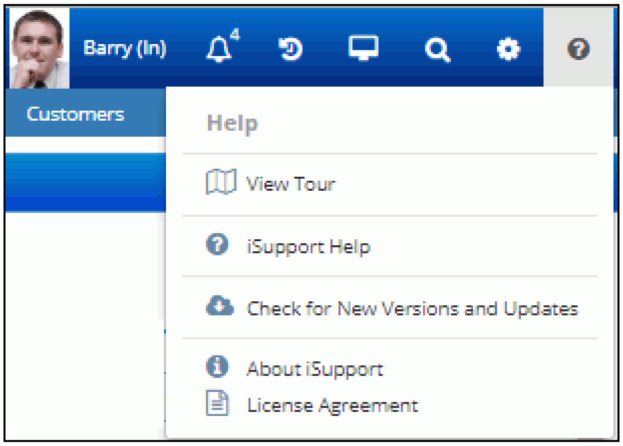


- Select Configuration to access the Configuration module as well as Search, Favorites, Recently Viewed, and Top Viewed configuration screens.



The iSupport Agent Manager service performs scheduled execution of iSupport agents; it is required to be running for normal operation of iSupport. An Alert will appear above the Desktop Configuration icon when the iSupport Agent service stops. Agent status is checked when the Desktop loads; it is updated when the agent starts or stops. To start the iSupport Agent Manager service, use the icon next to the status indicator in the Agent configuration screen or go to Administration Tools | Services on the server that is hosting iSupport and start the service.

- Select Help to open a menu for accessing iSupport documentation, displaying the iSupport license agreement, and checking the version of your iSupport application, and more. the Online Help option includes overviews and context-sensitive help topics for iSupport; configuration overview pages contain links to comprehensive PDFs that cover features by work item type. The help system is installed in the Help/CSH directory under the directory in which the Desktop is installed. You can select Help in entry screens to display a comprehensive help topic with information on the functionality in that screen.

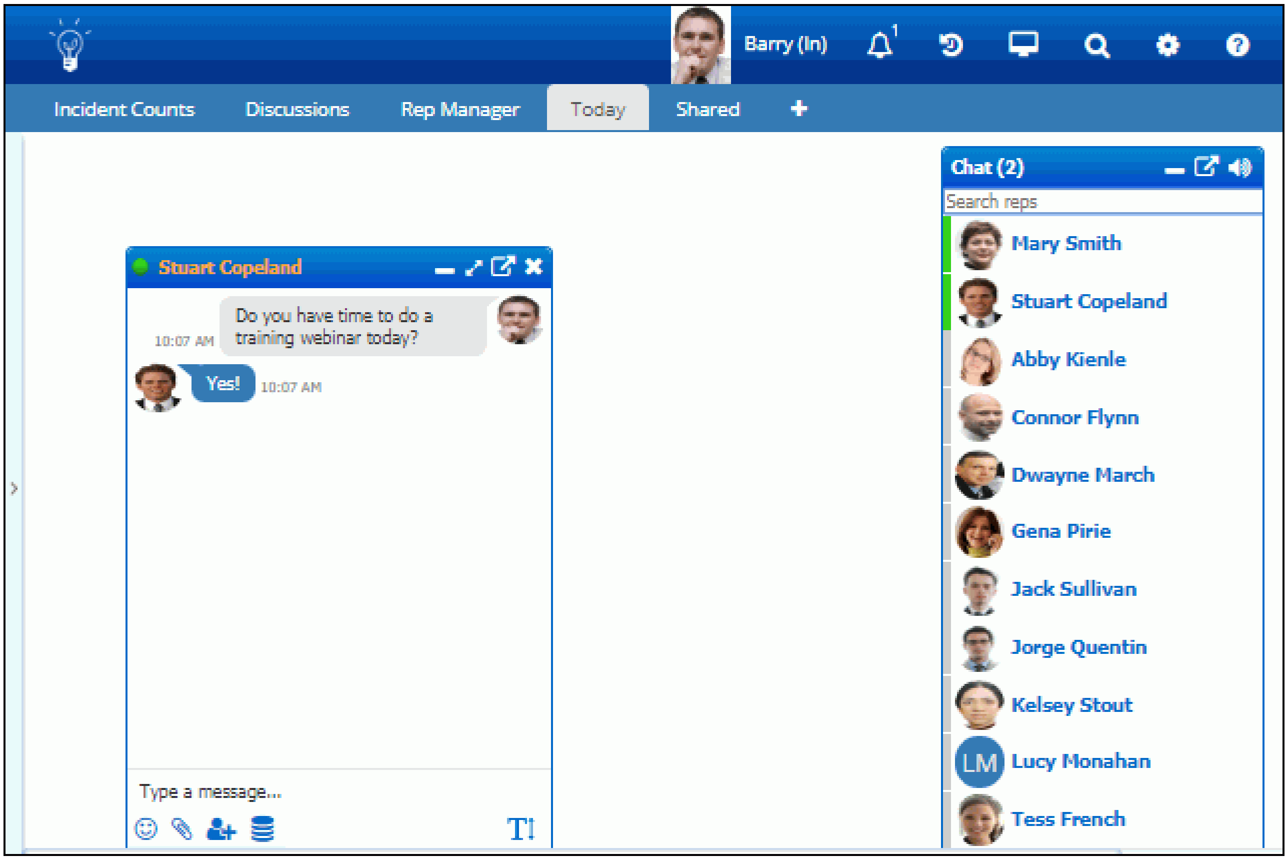


Using Chat

The Chat feature enables you to communicate with other support representatives and customers via messaging. You can use the Options and Settings | Customize | Chat Themes screen to configure the colors for the fonts and elements in the Chat dialogs; see “Customizing Chat Themes” on page 12 for more information. You can enable browser-based chat notifications; see “Using Browser-Based Chat Notifications” on page 12.

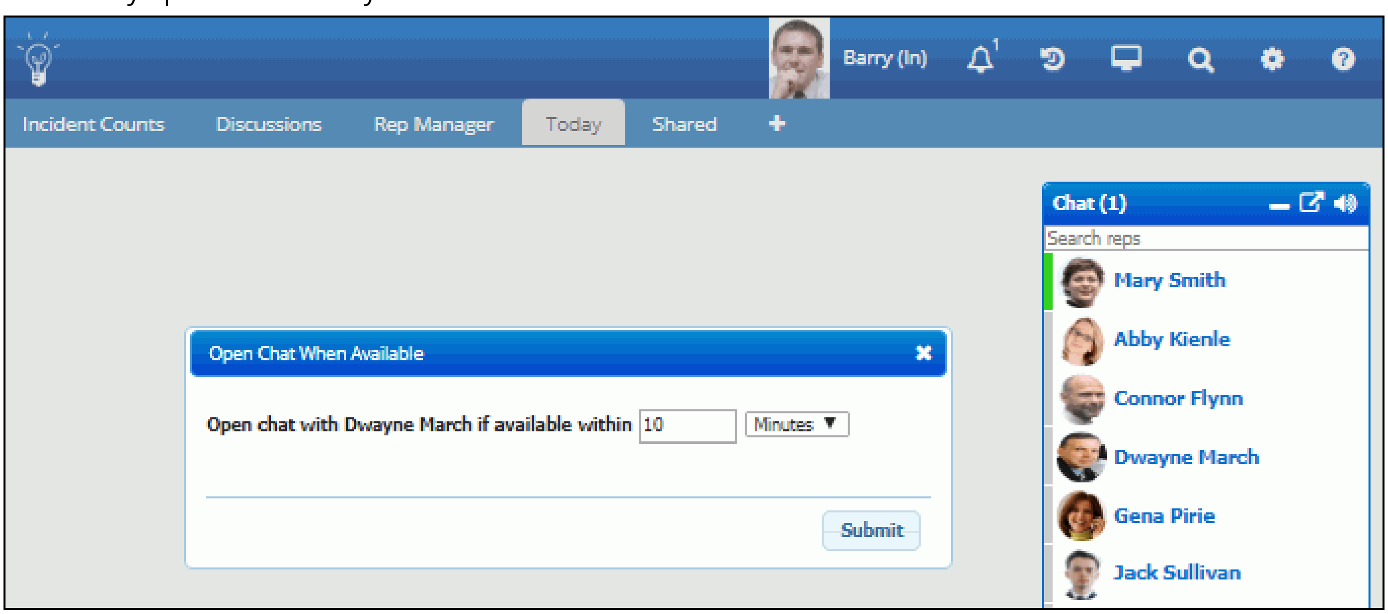
Chatting With Other Support Representatives

Support representatives can use the Chat window to send messages to each other; this feature is enabled in the Global Settings screen.



Support representatives can use the Emoji option to display a menu of emoticons for use in responses, attach files via the Attach File option, include other support representatives via the Add Rep to Chat option, and search for/add a knowledge entry to the chat via the Add Knowledge Entry to Chat option. Change the font via the Font Size icon.

You can automatically open a chat when an unavailable support representative becomes available by clicking on their name; an Open Chat When Available dialog will appear for entering an amount of time in which to automatically open a chat if they become available.

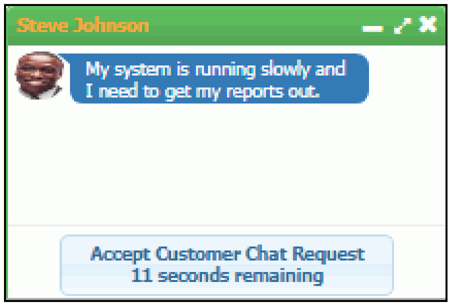


Note that administrators can view chats between support representatives via the Options and Tools | Administer | Rep Chat History screen in the Configuration module. Administrators can exclude a support representative from this list via setting in the Support Representative Profile screen.

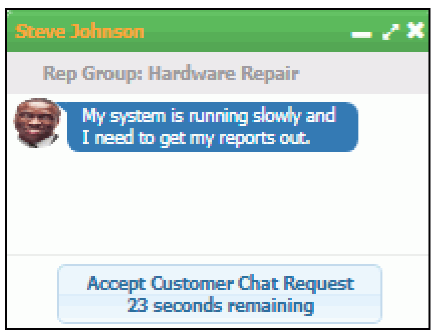
Chatting With Customers Using mySupport

mySupport chat is enabled in the Feature Basics configuration screen and configured for a mySupport portal via the mySupport Portal Options screen. mySupport chat can also be hosted on other web sites; see the online help for more information.

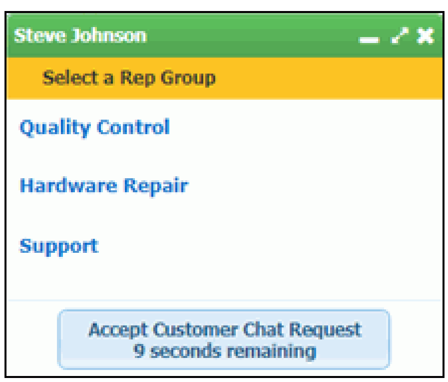
A chat request from a mySupport customer will appear to support representatives that are scheduled to be available to chat (via the Support Representative Group screen); the window will have an Accept Customer Chat Request button and a green header bar. If enabled, a countdown will appear on the button.



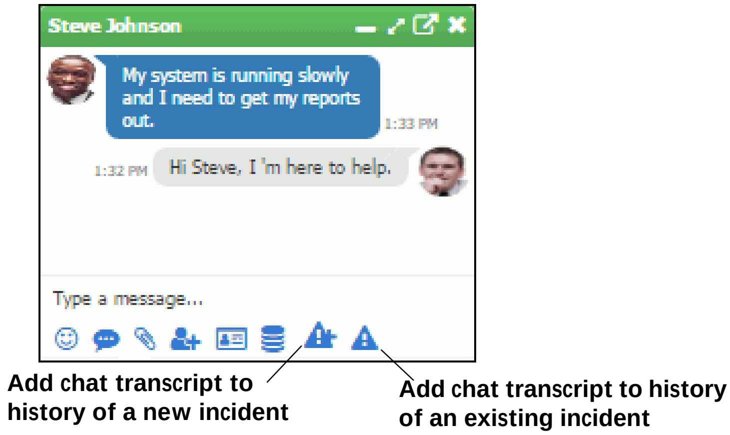
If the customer selected a support representative group or a support representative is only available in one group, the group name will appear at the top of the chat dialog.



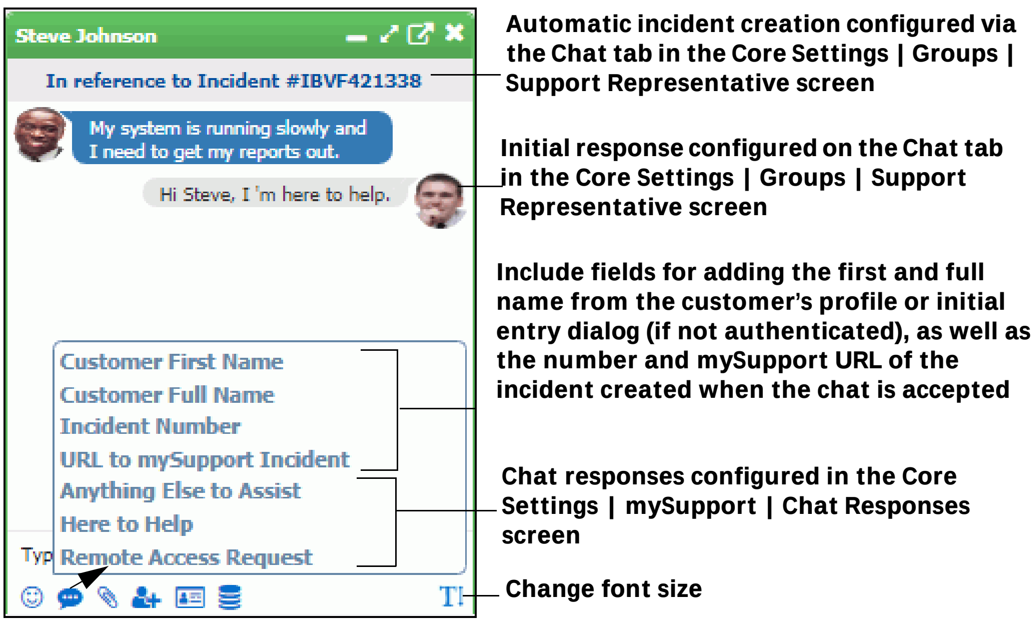
If multiple groups are selected in the Available Rep Chat Groups field on the Chat tab in the mySupport Portal Options screen, the customer does not select a group, and the support representative is available in multiple groups, a list of those groups will appear for selection.



If automatic incident creation is not configured, icons will be added for adding the chat transcript to an incident.

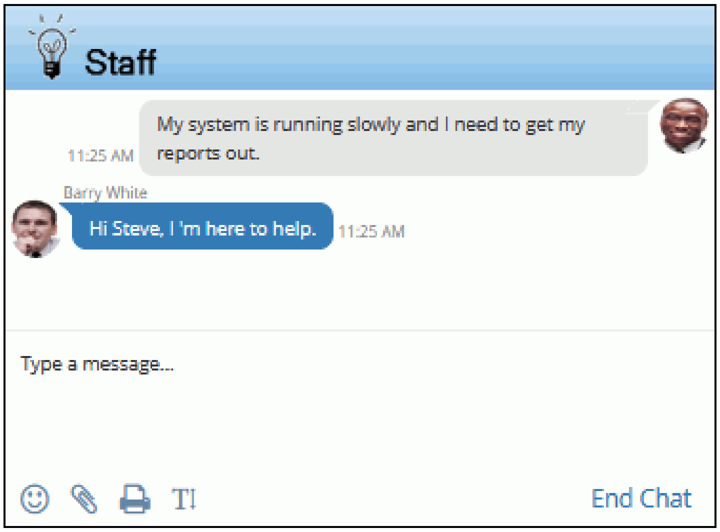


If automatic incident creation is configured, a link will display a the top of the chat dialog, and the configured initial response will display to the customer. The Chat Responses option will appear for displaying include fields and configured responses. (Note that chat responses will overwrite any existing text in the entry area; include fields will append values to existing text.) The support representative can add other reps to the chat and view the customer's profile record.



Options for the mySupport Chat Window

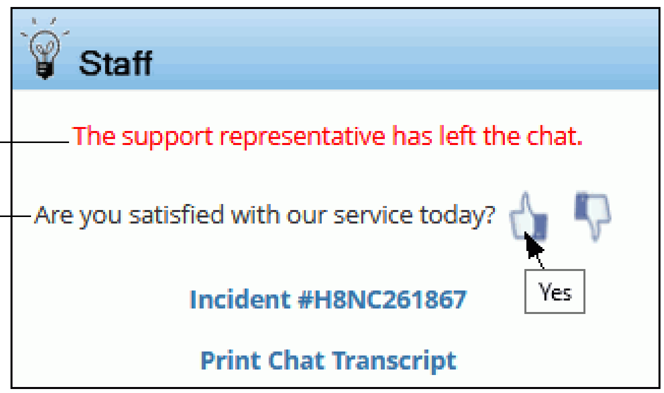
An example of a mySupport chat window is shown below; customers can use emojis and print the chat transcript while a chat is in progress.



The dialog that appears when a support representative ends a chat can include configurable text informing that the support representative ended the chat, a feedback question, a link to the incident (if applicable), and the option to print the transcript.

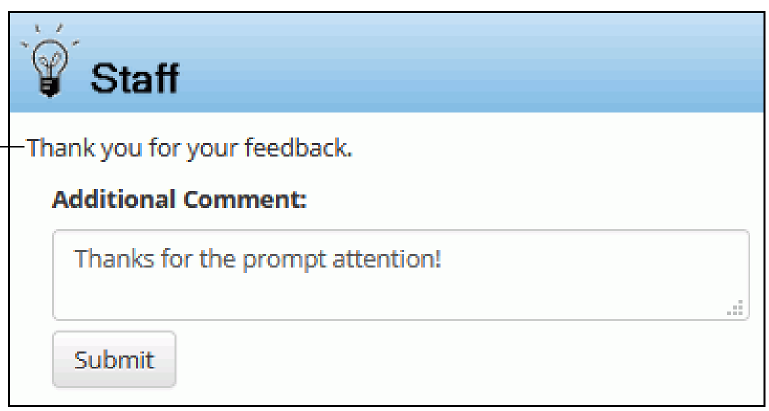
Configure this text via the Chat tab in the Core Settings | Groups | Rep Groups screen.

Enable this prompt via the Chat tab in the Core Settings | Groups | Rep Groups screen. Customize this message via the Feedback tab in the Core Settings | Feature Basics | Incident Management screen.



If a feedback question was included, another dialog will appear with a configured message and space for entering any comments.

Customize this message via the Feedback tab in the Core Settings | Feature Basics | Incident Management screen.

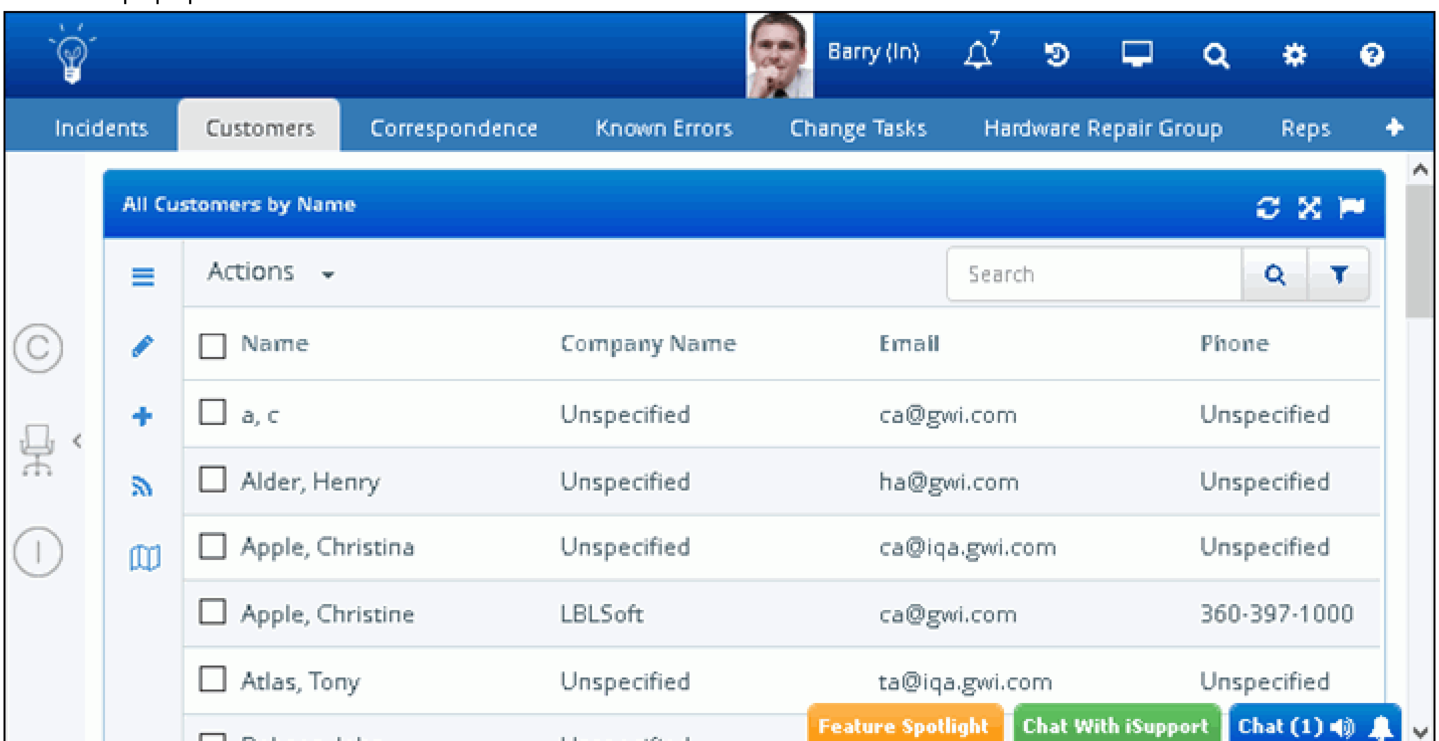


Using Browser-Based Chat Notifications

You can enable browser-based notifications for chat requests. When an incoming chat is received, the following dialog will appear on the operating system desktop; click it to open the chat on the iSupport Desktop.

This functionality is available when iSupport is accessed via Microsoft Edge, Mozilla Firefox, Apple Safari, and Google Chrome (when web site is https); it is not available on Internet Explorer or via a mobile browser.

These notifications must be enabled in browser settings, for each type of browser. The first time you enable the option you will be prompted to allow notifications from the site; select the Allow option. With the feature enabled and notifications allowed, the browser will display a notification each time a new chat arrives. A bell will appear on the iSupport Desktop chat tab as shown in the example below. Different browsers have slightly different options for how the notifications are presented and whether or not the notifications time out, but iSupport will attempt to only send one popup and it will time out after 10 seconds.



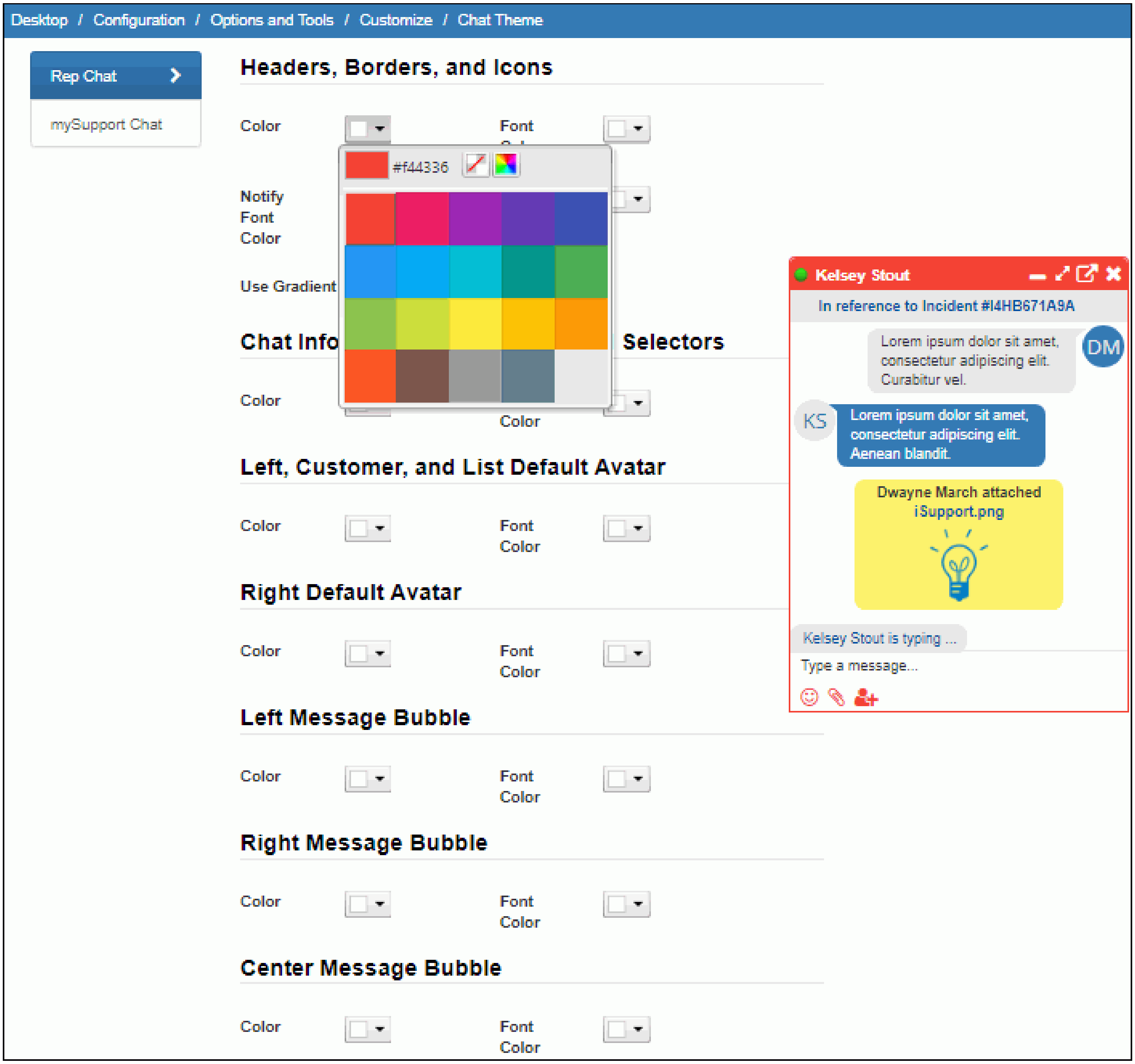
Browser-based notifications enabled

If you don't allow the notifications, the bell icon will appear empty on the Chat tab on the Desktop; the next time you click the bell, you will be informed that you will need to access your browser's notification settings to change the entry for the rep site from Deny to Allow. Note that once you enable notifications for two different types of browsers (for example, Mozilla Firefox and Microsoft Edge), disabling notifications on one browser type will disable notifications on all browsers.

Customizing Chat Themes

Use the Options and Settings | 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.

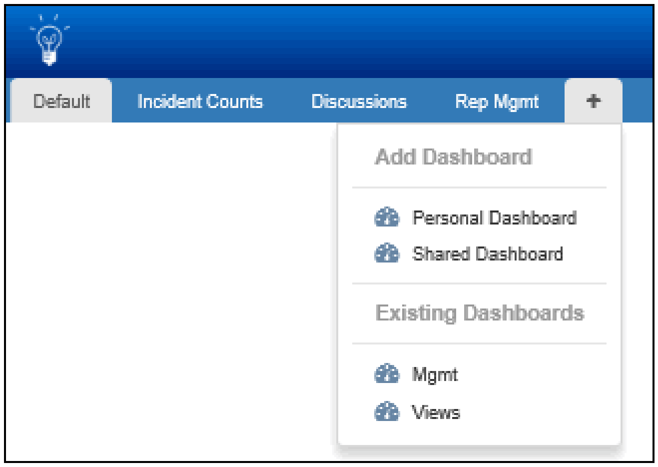
Click on a dropdown to display a color picker for the applicable elements; the selected color will appear for the affected elements in the example on the right. Hover over the field label (for example, Color) for a description of the affected elements. Select No Color to reset a field to iSupport's default color; use the Reset Defaults button at the bottom of the screen to set all fields back to iSupport's default colors.



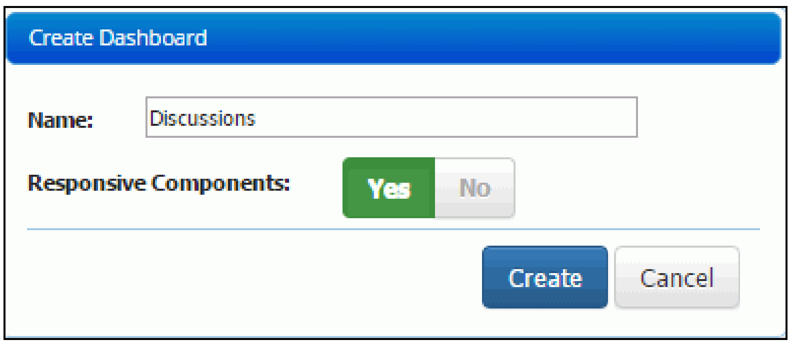
Working With Dashboards

Dashboards are tabbed spaces on the Desktop that you can label and add components to. Access to dashboards can be personal or shared; a personal dashboard can be accessed by only the support representative who created it and others with configured permissions, and an existing shared dashboard can be added by other support representatives. Configured permissions will determine whether you can create, edit, and delete a personal or shared dashboard. Restricted access can be configured; see "Setting Dashboard Access" on page 15.

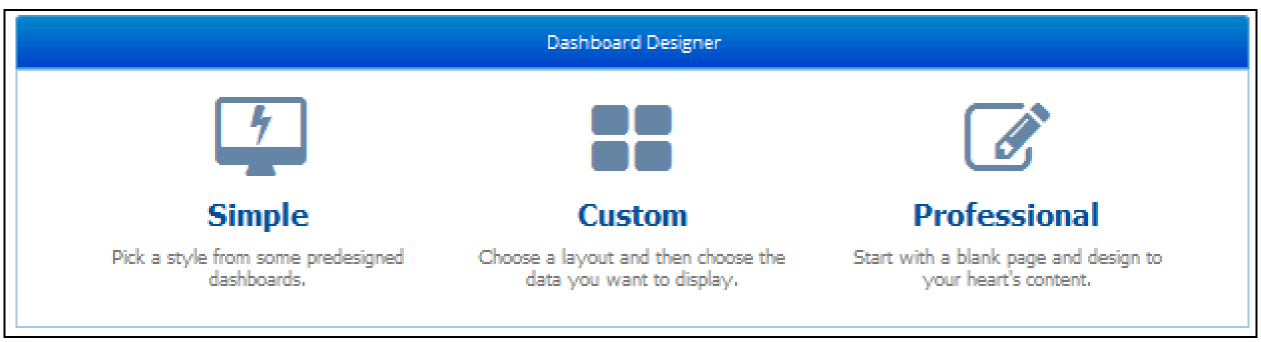
Select Add Dashboard to add a personal or shared dashboard, or an existing dashboard, to the Desktop.



In the Create Dashboard dialog, enter a name for the dashboard and, if applicable, select Yes in the Responsive Components field to enable component widths to automatically adjust and display complete component frames. Horizontal scroll bars will be added to the content within each component frame when needed.

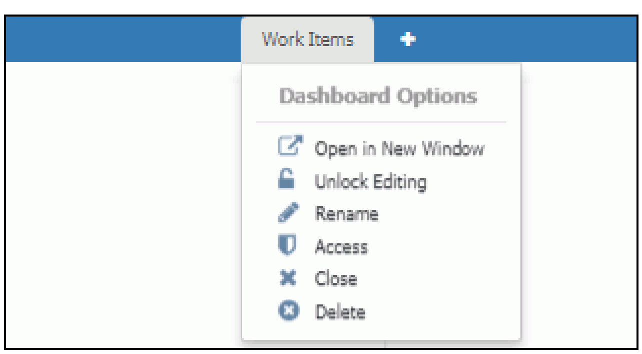


A Dashboard Designer will appear; it includes options with predesigned dashboards and component layouts.

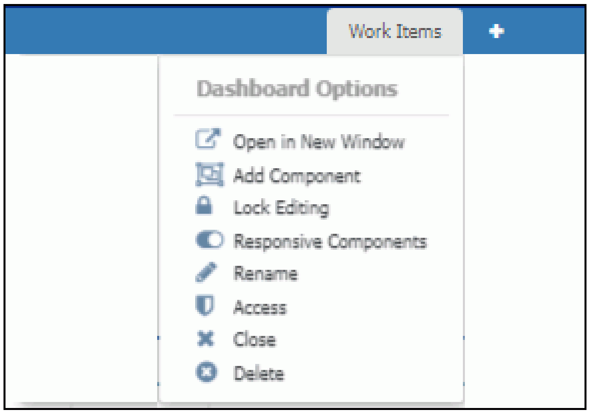


Right-click on a dashboard tab to display a menu of dashboard options.

If you have added or created a **shared** dashboard, it will be **locked** by default to prevent anyone from editing it. Select **Unlock Editing** on the Dashboard Options menu to make changes; the dashboard will reload for anyone else using it after an edit is made.

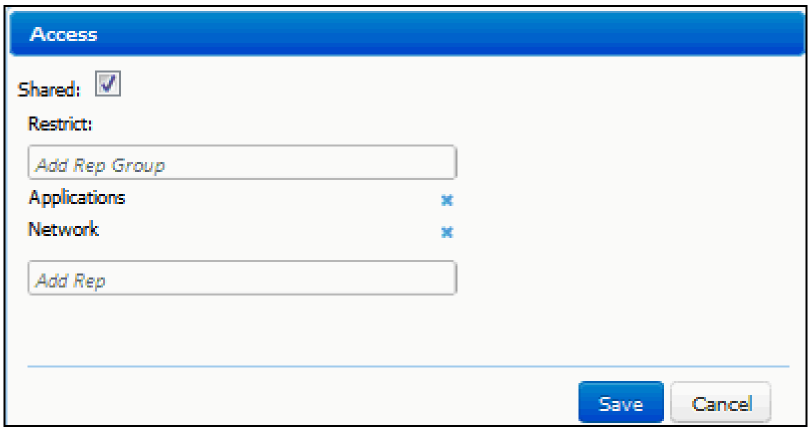


The Lock Editing and Add Component options will appear in the menu after a dashboard is unlocked.



Setting Dashboard Access

The Access option on the right-click Dashboard Options menu enables you to specify the individual support representative(s) or group(s) that can access the dashboard.



To make the dashboard available for other support representatives to add to their Desktops via the Add Existing dashboard menu option, select Shared. Under Restrict:

- To make the dashboard available only to specified groups, place your cursor in the Add Rep Group field and select the group(s).
- To make the dashboard available only to selected support representatives, place your cursor in the Add Rep field and select the support representative(s).

Use the Desktop/Dashboards tab in the Rep Groups screen in Configuration to display the dashboards associated with a group.

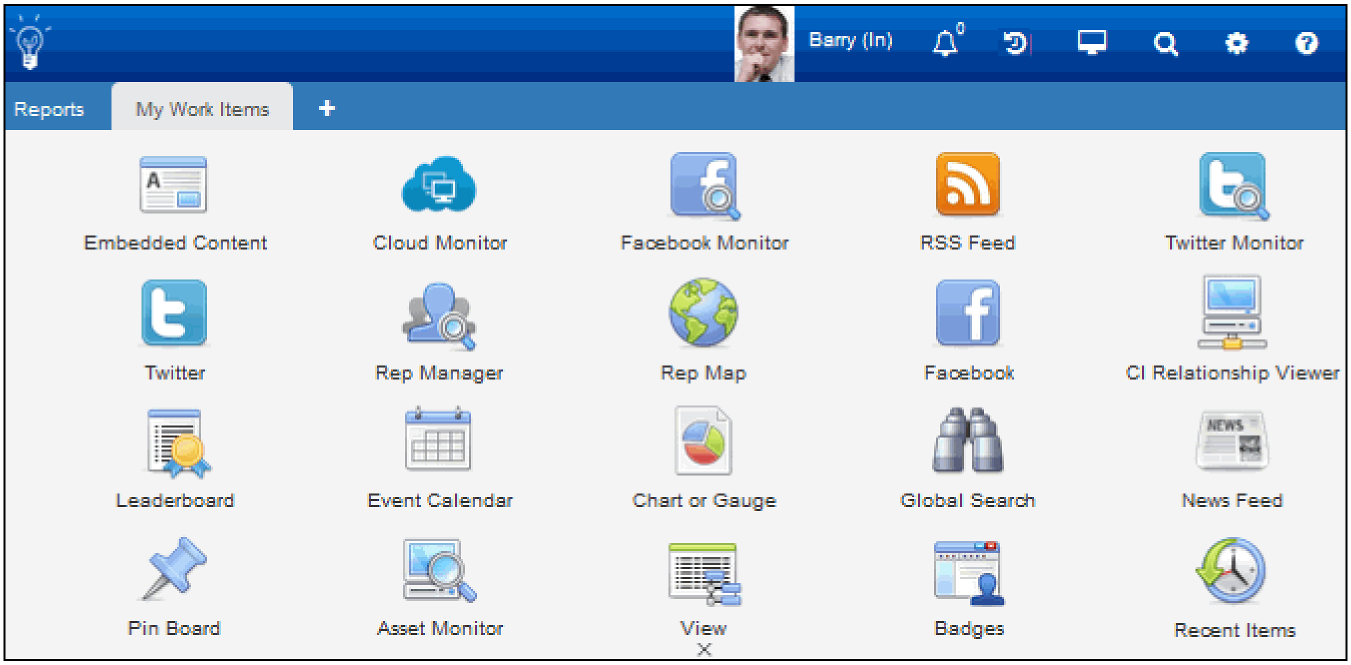
Other ways to control dashboard content:

- To add, delete, and rename dashboards, control dashboard access, and automatically include dashboards on the Desktop of support representatives, use settings on the Dashboards tab in the Alert and Dashboard Manager (accessed via the Desktop Content menu). To automatically add a dashboard to the Desktops of specified support representatives, click the Personal or Shared link in the Access column, select the support representatives, and click the Save and Push button.
- To push shared dashboards associated with a group specified as primary to the Desktop of a support representative, add the primary group via the Groups tab in the Support Representative Profile screen. You will have the option to push the dashboards when you save the record.
- Use the Permissions screen to allow or disallow a support representative to create, edit, or delete a personal or shared dashboard, view, chart, and alert on the Desktop. Access this screen via the Desktop Content tab in the Support Representatives | Roles | Permissions and Groups | Support Representative | Details | Associated Roles screens.

Note: The update and refresh of Awareness and Chat functionality, as well as Desktop components, can apply to only four open pages at one time. The message “Awareness and chat not available” or “Auto refresh and chat not available” will appear if this is exceeded. These limitations do not apply if you are using Windows Server 2012 with WebSockets enabled and the current version of iSupport’s supported browsers.

Adding and Using Components

Components are small frames that are placed on a dashboard for viewing, reporting, and monitoring iSupport functionality. Display available components by selecting Unlock Editing and then Add Component on the right-click Dashboard Options menu. Drag the desired component onto the dashboard. When finished, select ✕ at the bottom of the dialog.

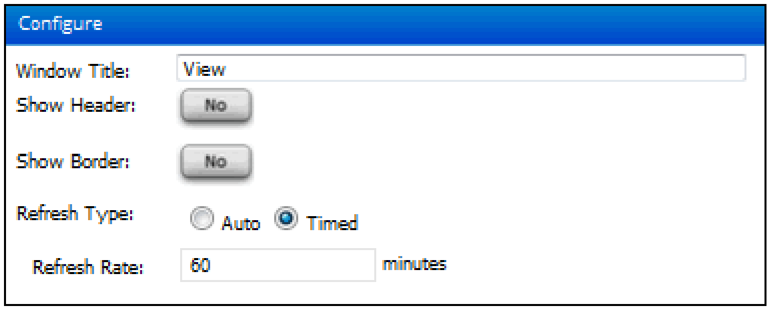


Use the Options and Tools | Customize | Dashboard Settings configuration screen to allow and disallow component availability, and the Core Settings | Groups screen to specify available components for members of support representative groups. Note that the Mass Mailing Manager will not appear on the component menu until enabled in the Mass Mailings configuration screen, and some component functionality is dependent on settings in a support representative's profile. For example, the Rep Manager component will not appear to a support representative that does not have the Rep Manager permission enabled in their profile.

Component Functions

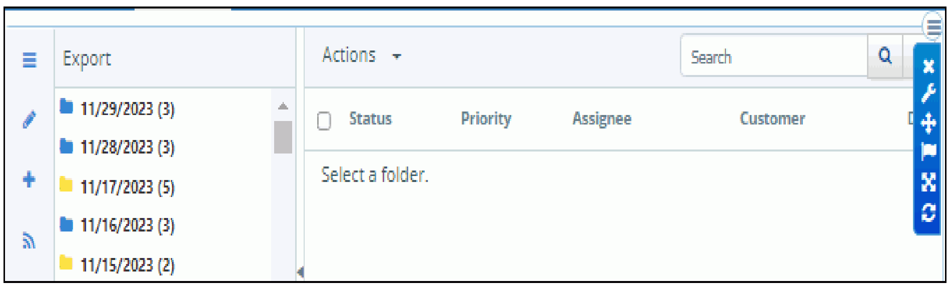
- Resize components via the bottom and right-side borders; you can drag the lower right corner to move both borders at once.
- Select **Maximize** to display only the component on the dashboard, covering it. The Minimize option will appear for you to redisplay the component in a smaller size along with all the other components.
- Select **Refresh** to redisplay the most current data (iSupport data does not refresh automatically when items are created, changed, or deleted.)
- **Alert** will appear for the Chart and View components for creating alerts that will appear in a dialog when a view field reaches a certain threshold.

- Select **Configure** to display options for the component such as enabling and naming the header and enabling/disabling the border.



The Auto option will refresh automatically when new data is available; the timed interval refresh option will refresh at the rate entered in the Refresh Rate field.

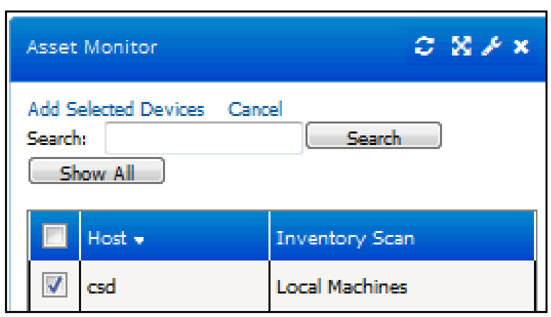
If you disable the header, select Show Toolbar to display component icons. The **Move** option will be included for moving the component.



Asset Monitor

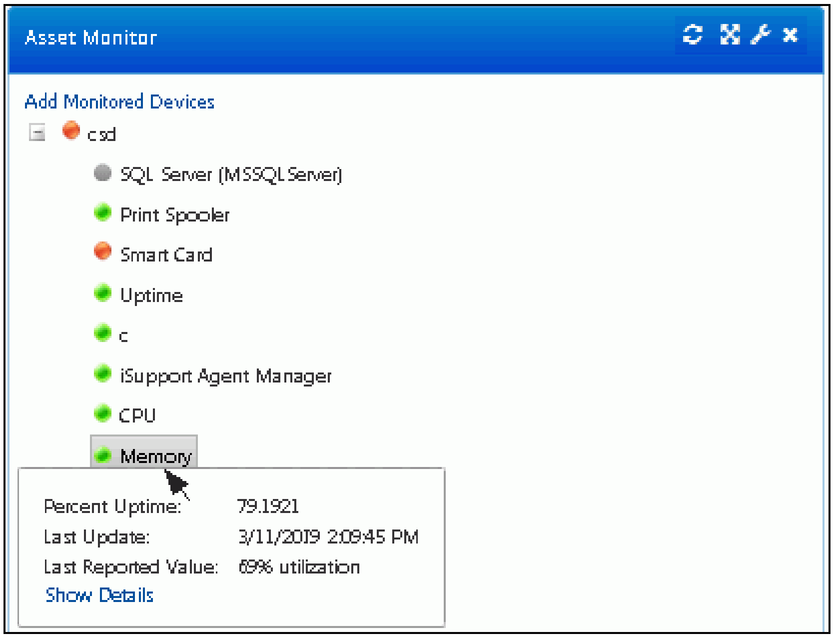
Use the Asset Monitor component to display results of monitoring configured in a scheduled scan and monitoring definition, including the state of devices and their CPU, memory, disk space, and services.

When you add the Asset Monitor component to a dashboard, an Add Monitored Devices link will appear for you to select the devices to appear in the component. Select the devices in the Host column and then click the Add Selected Devices link.

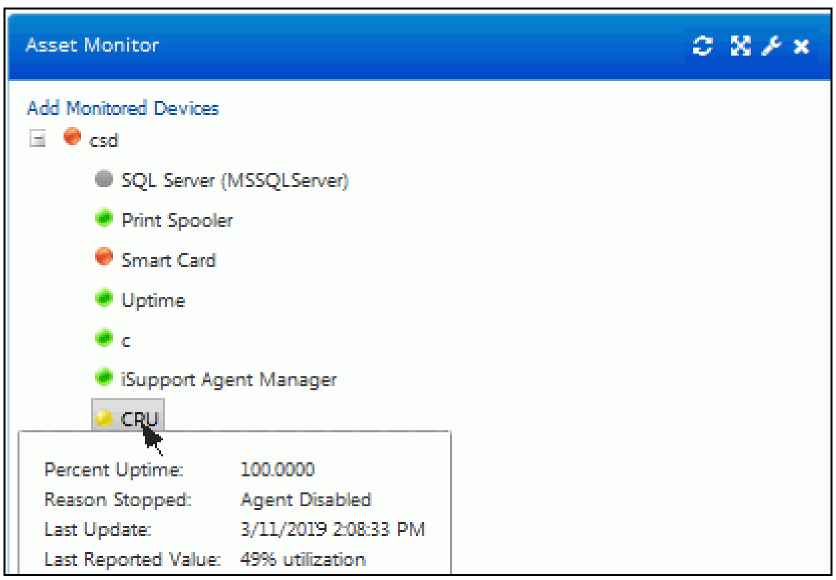


The state of monitored items and devices will be indicated by green, red, yellow, and gray dots; you can display details in a tooltip by hovering over the item or device name.

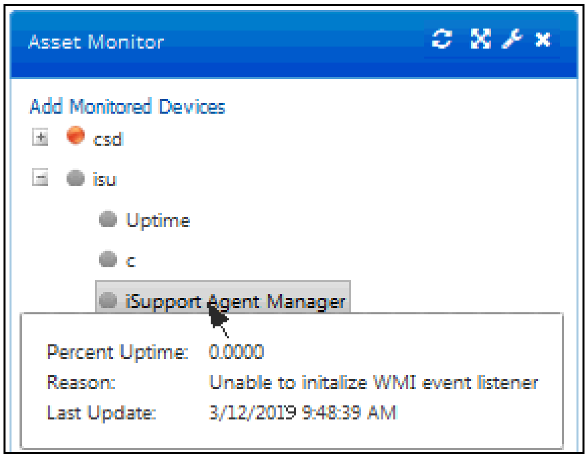
- A green dot will indicate that all monitoring settings in the Asset Inventory Scan and Monitoring Definition are configured correctly, the Asset Inventory Scan and Monitoring agent is working correctly, and the item or device is detected by monitoring and meeting configured thresholds.



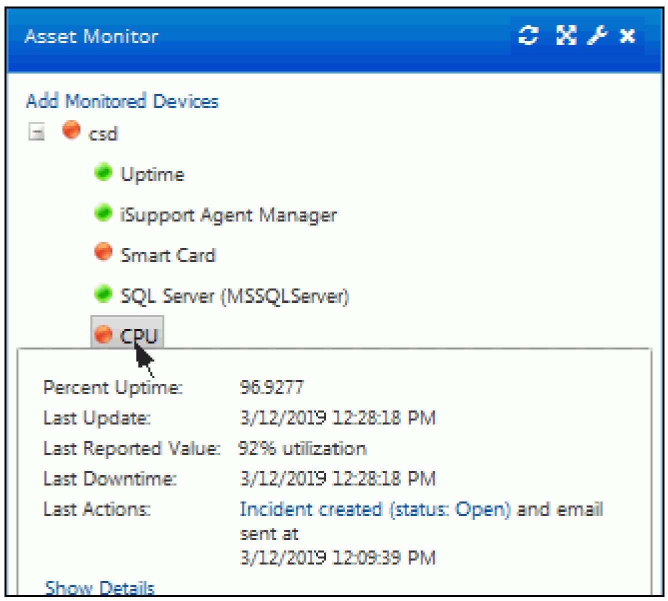
- A yellow dot will appear if, after everything has been working correctly as described above, the iSupport Asset Inventory Scan and Monitoring agent or iSupport Agent Manager service has stopped or has been disabled.



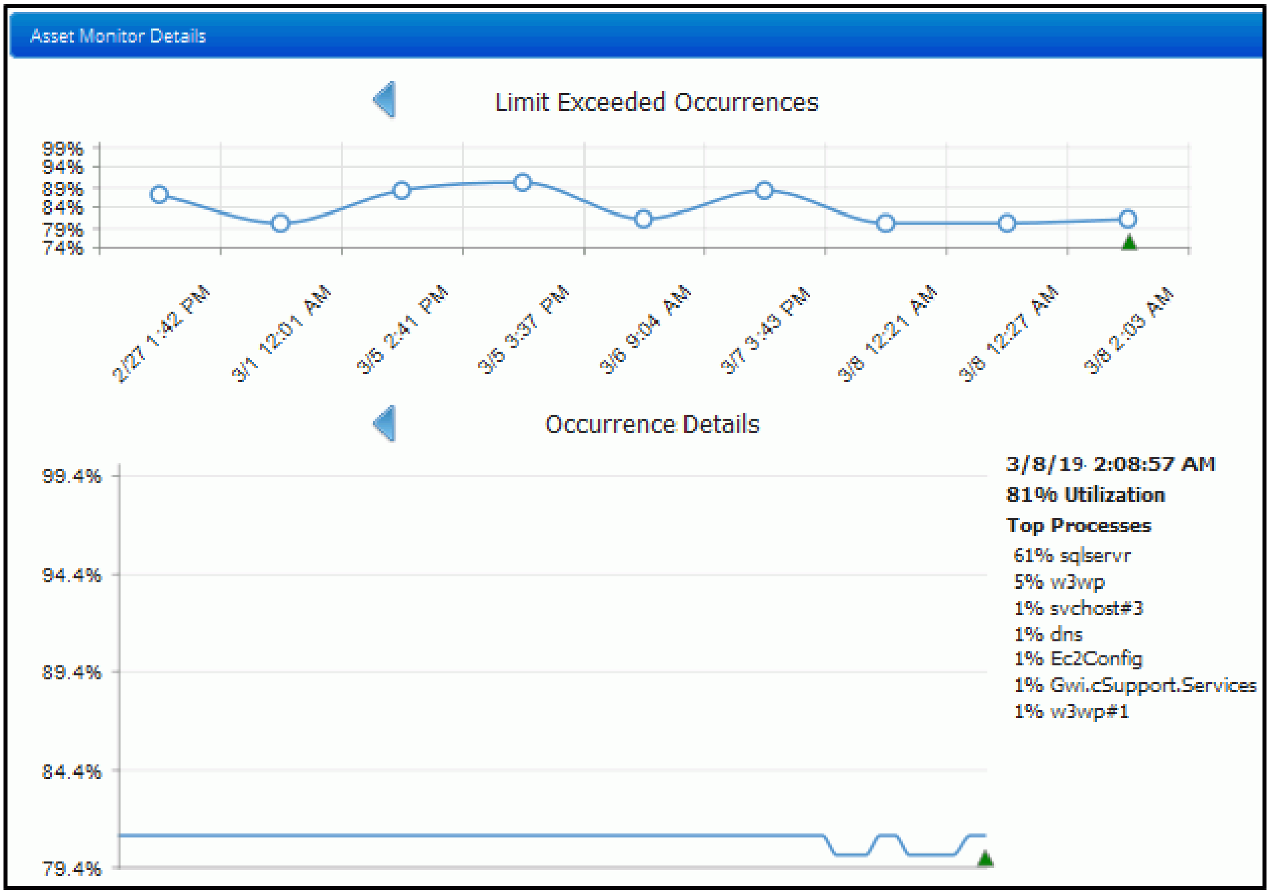
- A gray dot will appear for a monitored item or device on which the WMI listeners cannot be started (for example, if an error occurred with permissions).



- A red dot will appear if, after everything has been working correctly, a problem occurs with the item or device being monitored such as a service stoppage or a configured threshold that is not met (if any of the configured reporting thresholds are met (a monitored device is off-line or has high memory or CPU utilization, a monitored drive has disk space lower than the specified percentage, or a monitored service has a stopped state). Click the Show Details link in the tooltip to display a chart of the occurrences at which a configured threshold was exceeded and other details.

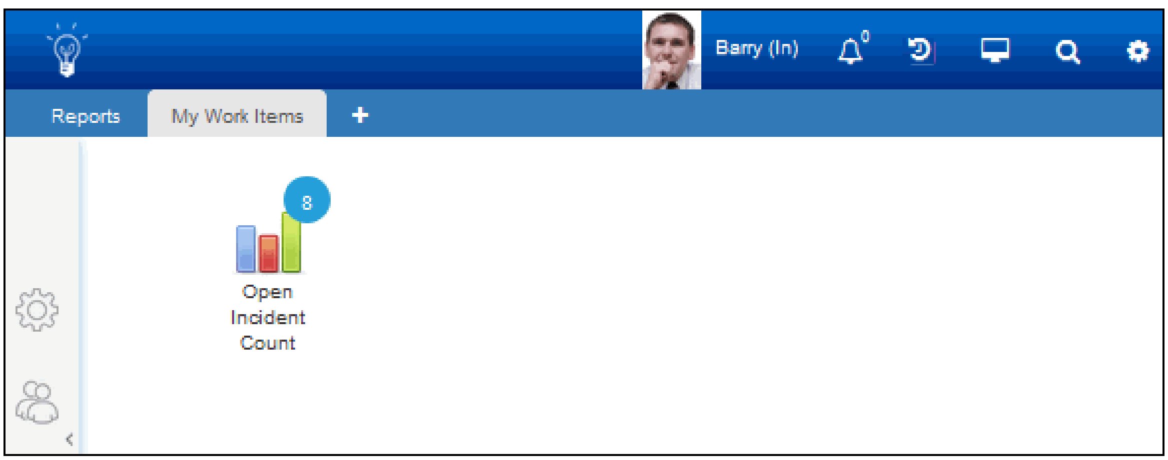


The Show Details link will appear in the tooltip if a configured threshold was exceeded; click it to display a chart of the occurrences at which a configured threshold was exceeded and other details:



Badges

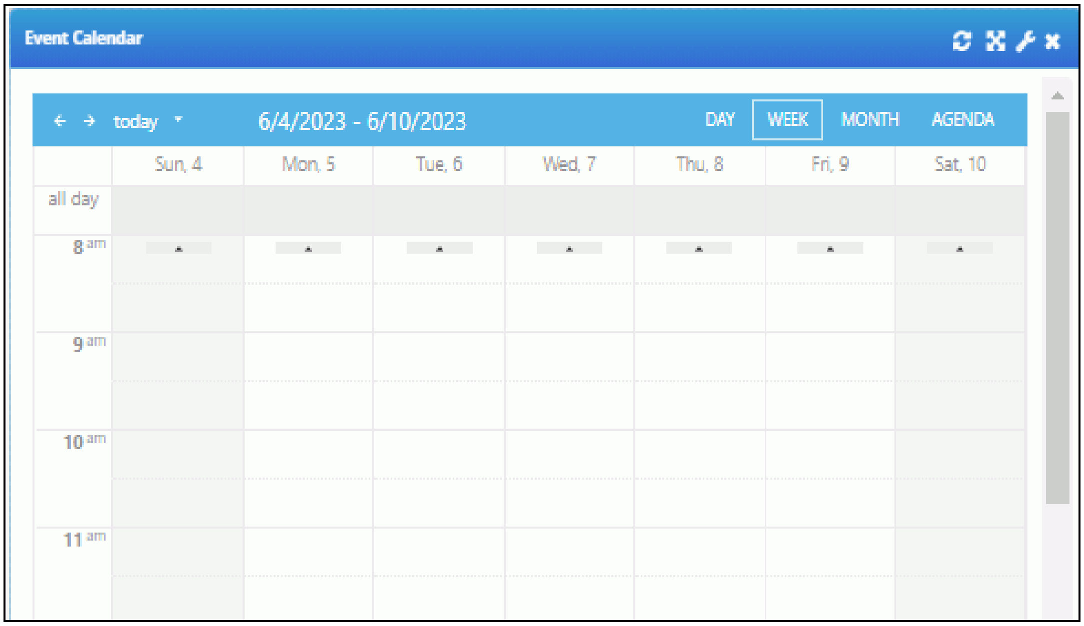
The Badges component displays a configurable icon with a count of a view field value. You can click on the icon to display the view. To configure the Badge component, start by dragging the Badge component icon to a dashboard. A larger New Badge icon will appear; select the gear option to configure the icon and criteria for the count.



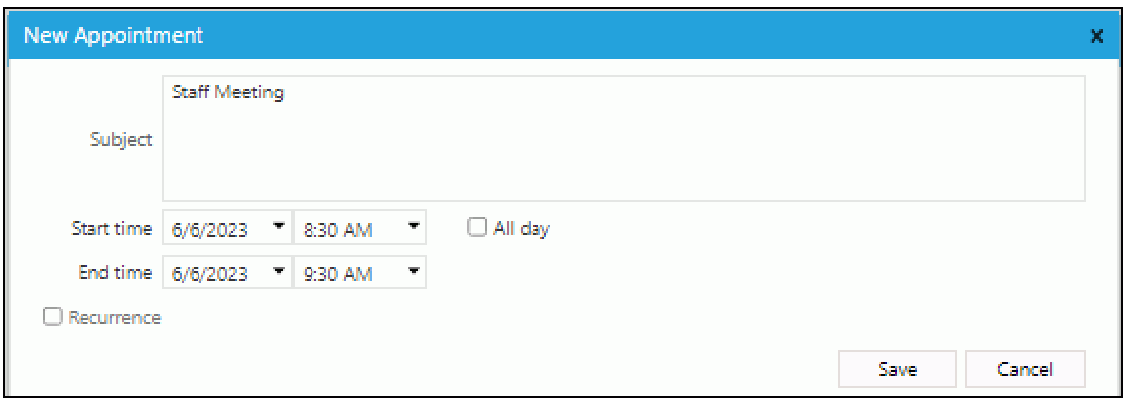
Event Calendar

The Event Calendar component displays the following; select the type of calendar to appear via the Configure option in the upper right corner of the component.

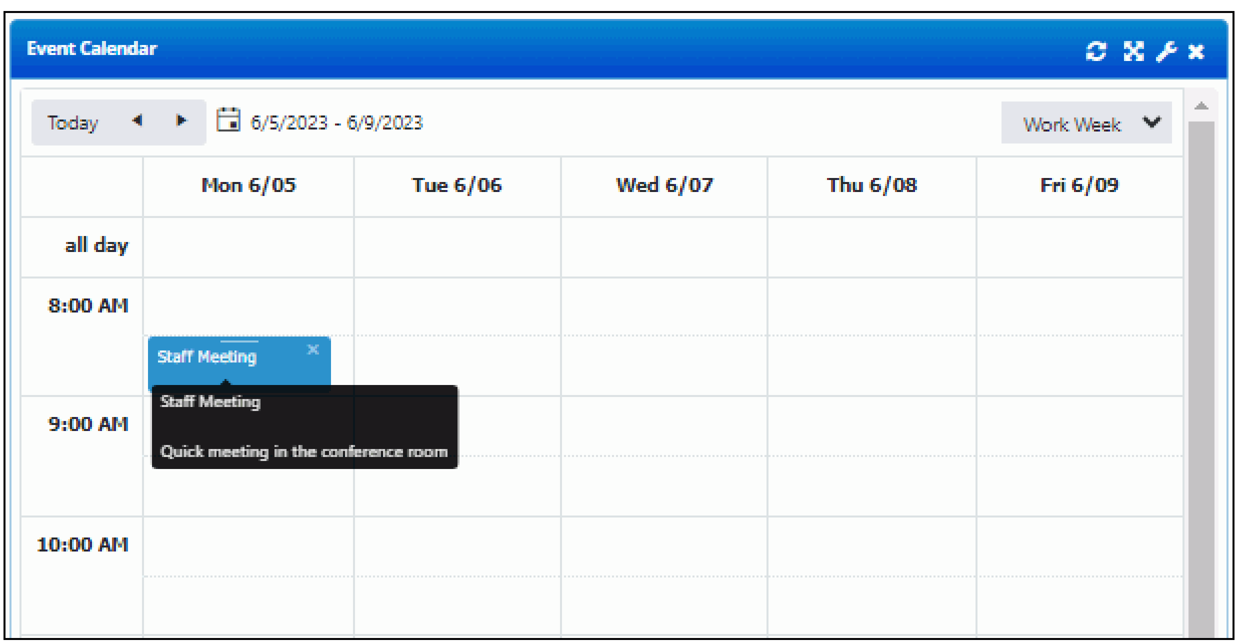
- A Google calendar or Microsoft Outlook calendar configured in the Calendar Integration screen. Note that you will need to use the fields on the Details tab in the Preferences dialog (accessed via the Desktop menu) to enable access to your calendar(s), set the work day hours during which you are available to be scheduled via iSupport, and set the default event duration.



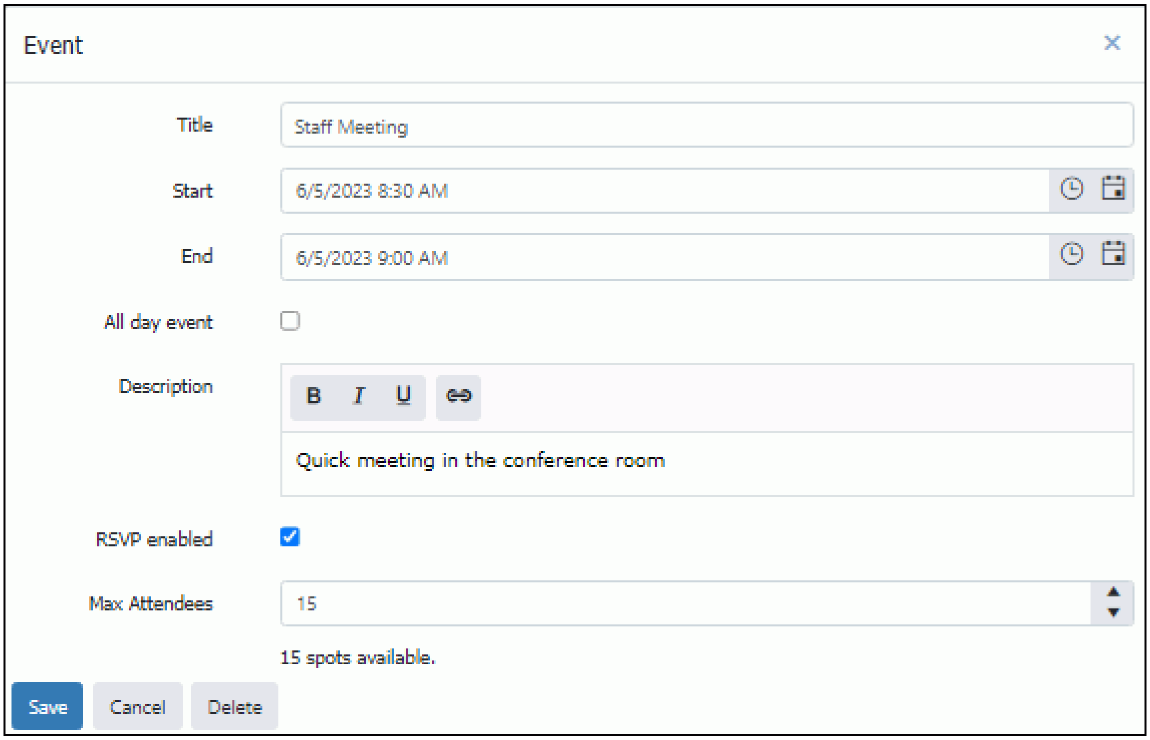
Double-click on a time block to display a dialog for creating a new appointment:



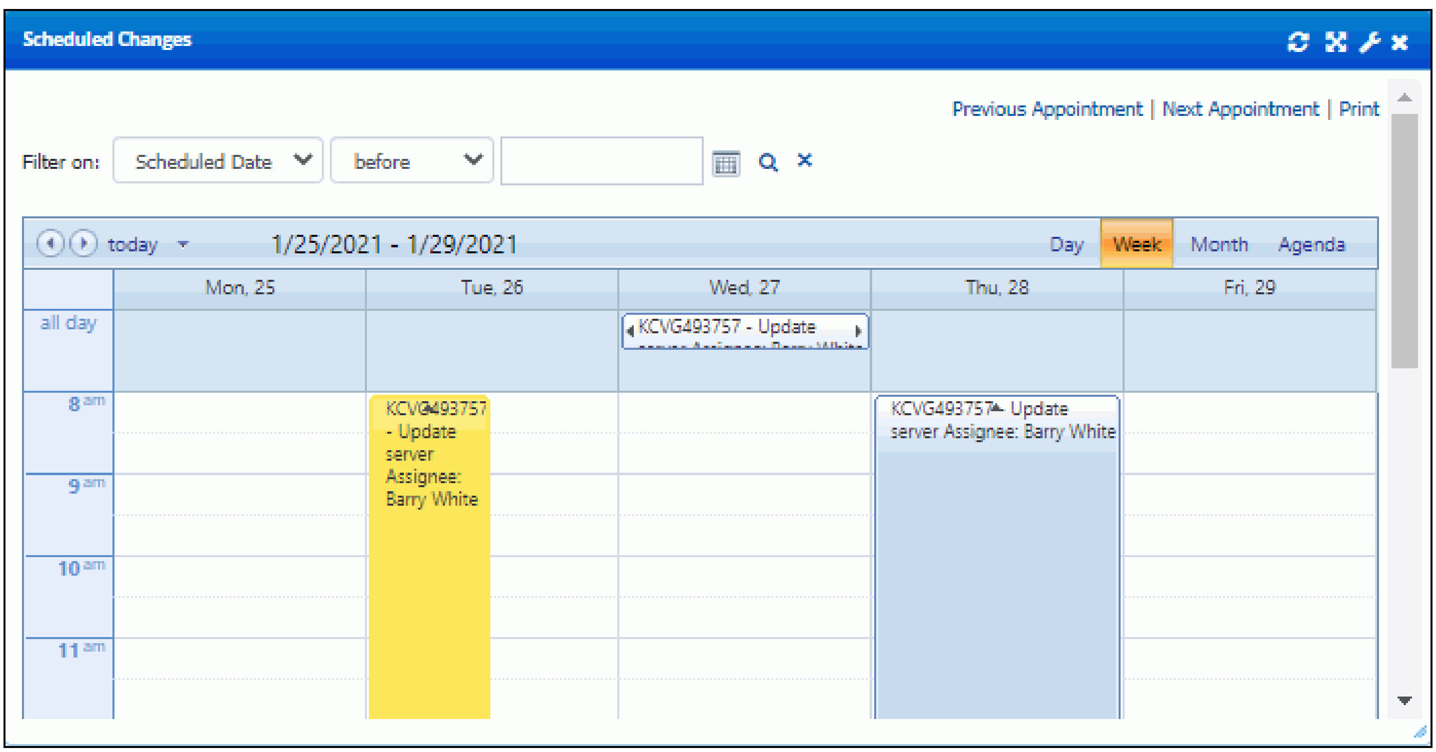
- An event calendar configured in the Options and Tools | Customize | Event Calendars and mySupport Portal Options Configuration screens. (See the online help for more information.) Event calendars can be used for support representatives and customers to create and view meetings and submit an RSVP (if configured).



Support representatives with edit access can double-click on a meeting to display and modify event details. A maximum number of attendees can be set for a meeting; the RSVP button will appear if enabled and the maximum number of attendees has not been reached.

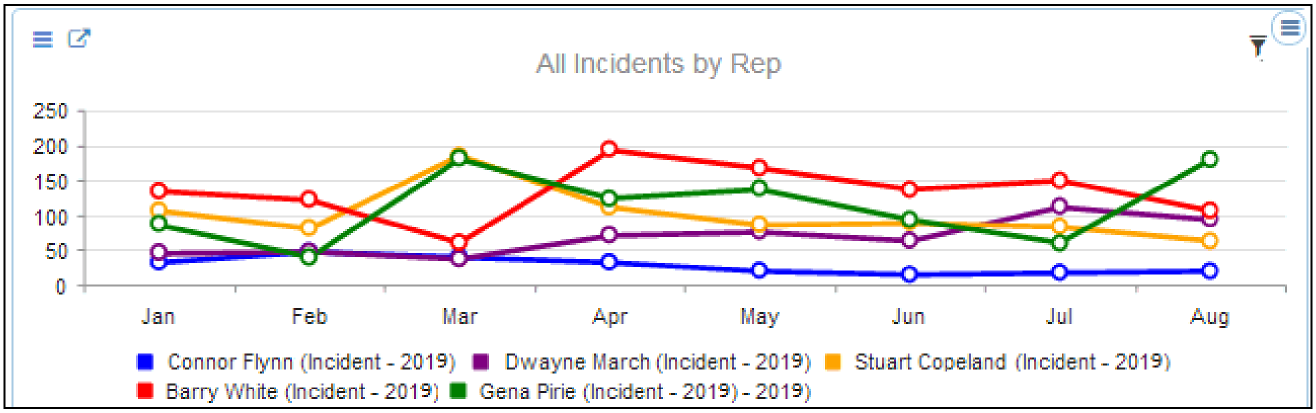


- A scheduled change calendar (Service Desk Edition).



Chart

Use the Chart or Gauge component to display all types of charts configured via the Chart Designer and Work Item Chart Designer. Select charts via the component configuration dialog. Access can be restricted to specified support representatives, customers, and/or groups.



Use the Export As Image option to export a chart as a .png file. The image size will be set based upon the size/ resolution of the frame in which the icon was clicked.

To remove an item in the chart, click on the item label in the chart legend (if configured).

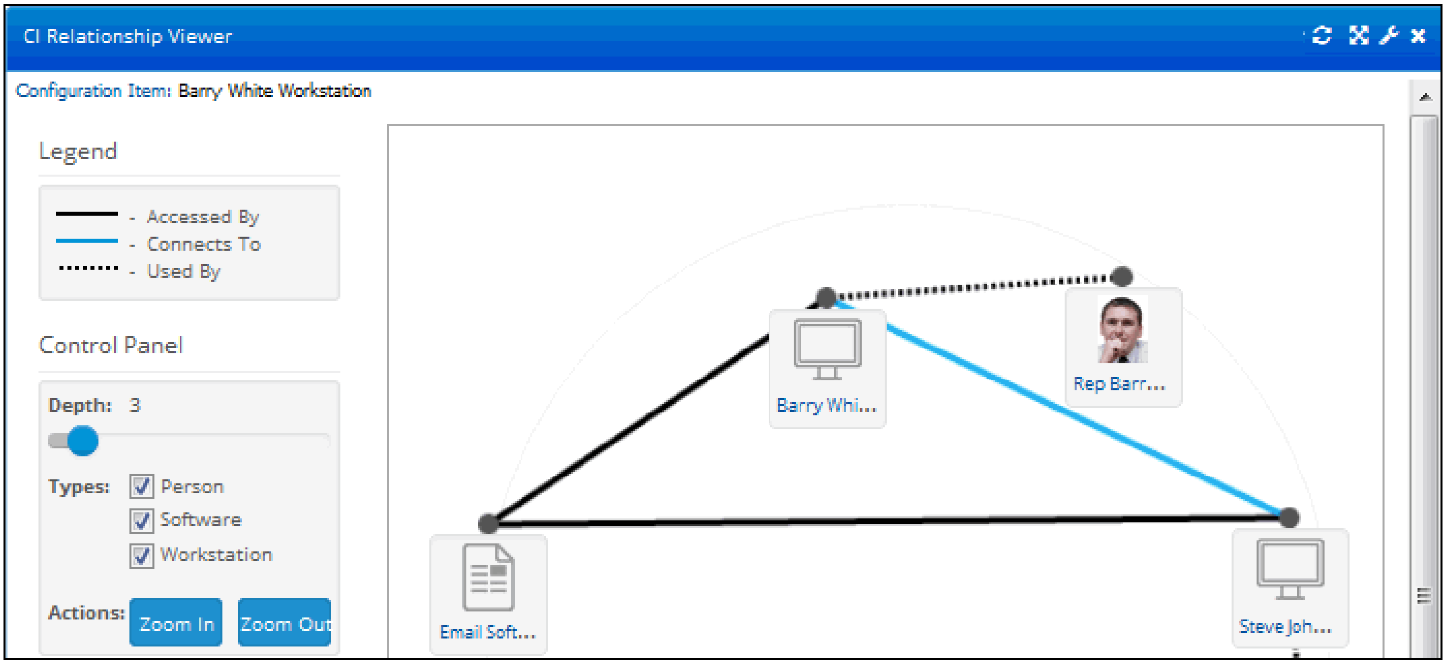
Select **Advanced** Search to set criteria for filtering data in a chart. Use the Match *<All/Any>* field to specify whether you want **every** *<field> <comparison method> <value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition and Remove Condition options to display and remove a *<field> <comparison method> <value>* search condition. Select Add Condition if you wish to include another condition. You can use the Add Condition Group option to put a set of search conditions to be evaluated together in a group. Click the Save button to enter a name for the search and save it. The Saved Searches option will display; hover over it to display saved searches.

If Opportunity functionality is enabled, you can display funnel-type charts by selecting Funnel in the Chart Type field in the component configuration dialog.

CI Relationship Viewer

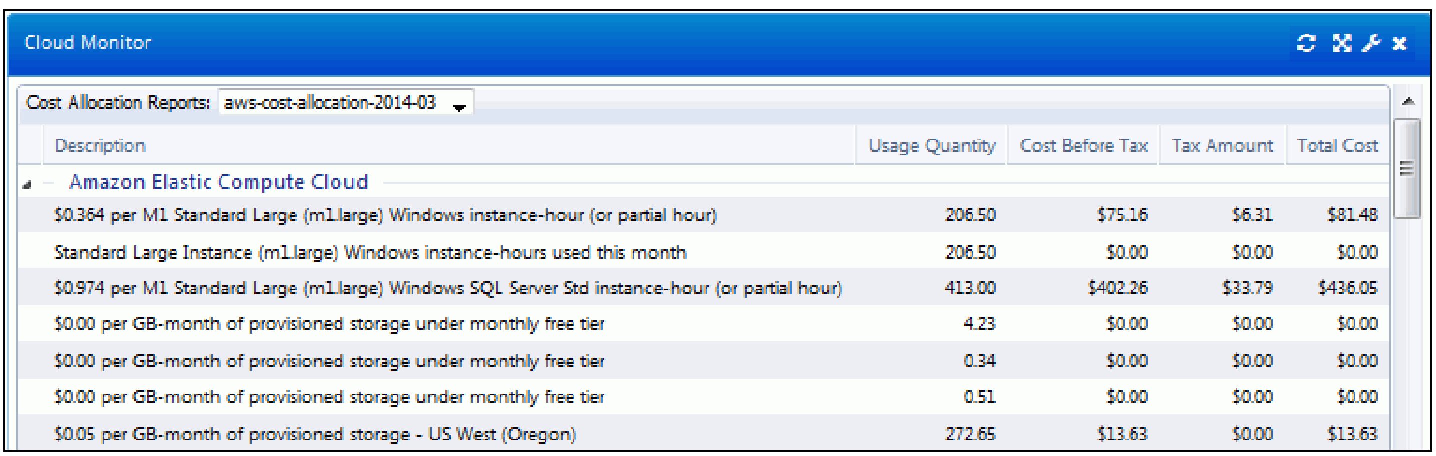
The CI Relationship Viewer component graphically displays the configuration items related to a specified configuration item. You can click on a configuration item name to open a record and reposition by dragging icons.

Use the options in the Control Panel to display different depth levels, select the types of configuration items to display, and zoom.



Cloud Monitor

If you use Amazon Web Services (AWS) to host your iSupport instance, you can view billing details in the Cost Allocation Report via the Cloud Monitor component. The component will display the current month's billing details for the resources that match a configured instance tag. All charges related to the instance (including EC2, EBS, Data I\O) will appear, including billing details for the past month. Use the Options and Tools | Integrate | Cloud Integration screen to configure the report.


Cloud Monitor

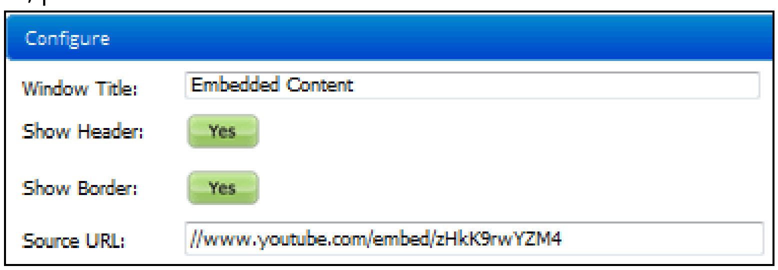
Cost Allocation Reports: aws-cost-allocation-2014-03

Description	Usage Quantity	Cost Before Tax	Tax Amount	Total Cost
Amazon Elastic Compute Cloud				
$0.364 per M1 Standard Large (m1.large) Windows instance-hour (or partial hour)	206.50	$75.16	$6.31	$81.48
Standard Large Instance (m1.large) Windows instance-hours used this month	206.50	$0.00	$0.00	$0.00
$0.974 per M1 Standard Large (m1.large) Windows SQL Server Std instance-hour (or partial hour)	413.00	$402.26	$33.79	$436.05
$0.00 per GB-month of provisioned storage under monthly free tier	4.23	$0.00	$0.00	$0.00
$0.00 per GB-month of provisioned storage under monthly free tier	0.34	$0.00	$0.00	$0.00
$0.00 per GB-month of provisioned storage under monthly free tier	0.51	$0.00	$0.00	$0.00
$0.05 per GB-month of provisioned storage - US West (Oregon)	272.65	$13.63	$0.00	$13.63

Embedded Content

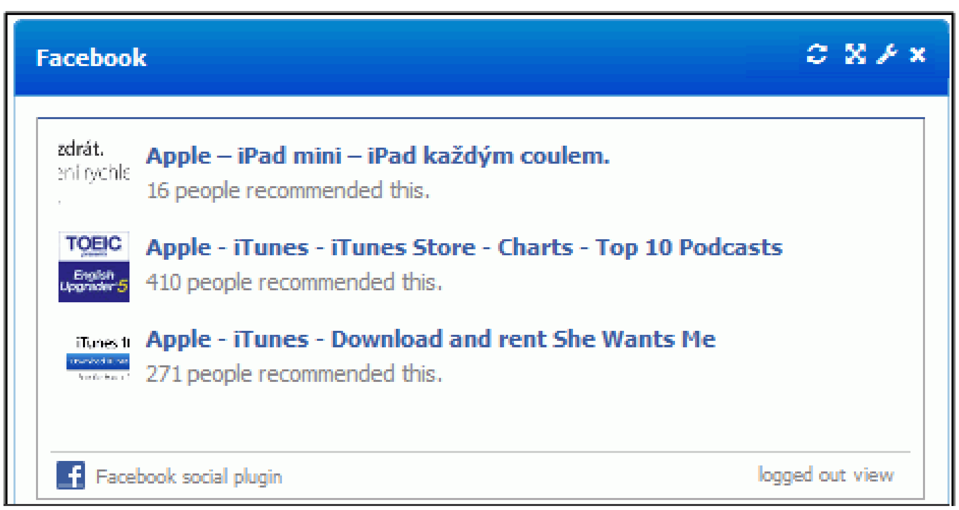
Use the Embedded Content component to display HTML content such as a web site or YouTube video.

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



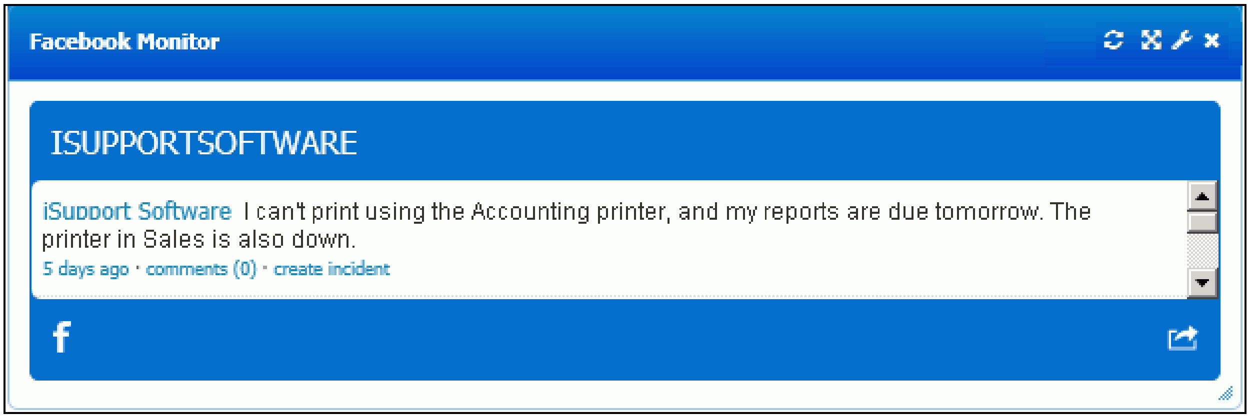
Facebook

The Facebook component displays a Facebook activity feed for a specified web site. To configure this component, enable Facebook Integration via the Facebook tab in the Social Media Integration Configuration screen and then use the component configuration dialog to enter the web site (example: www.apple.com) in the Facebook Domain field.



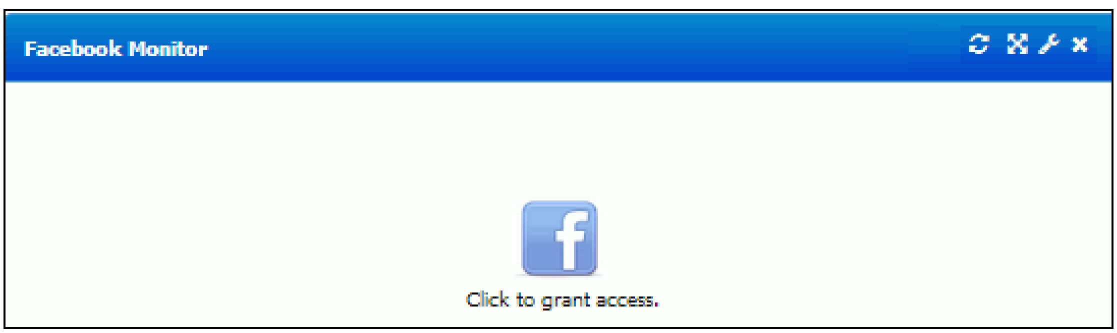
Facebook Monitor

The Facebook Monitor component monitors a Facebook page and displays posts and comments from it. You can create an incident from a listed post or reply.



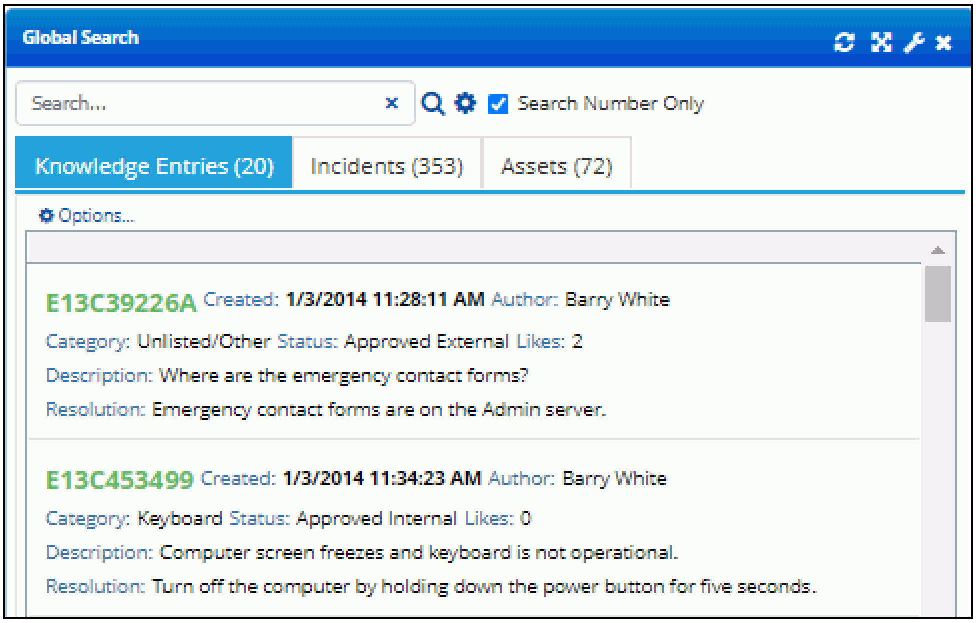
If the customer's Facebook email address exists for a customer in Customer Profiles, the matching Customer Profile record will be used; otherwise, a new Customer Profile record will be created with the customer's email address in the format of <*Facebook username*>@facebook.com. A reply will be posted 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.

This component requires that a Facebook application is configured and made available to the Desktop via Social Media Integration Configuration screen. Enter the page username (which is included in the Facebook page URL) in the Monitor Page field in the component configuration dialog. The following will appear; click to log in via Facebook and grant access to your public profile and friend list. Access to your public profile is required. Select the option to revoke access.

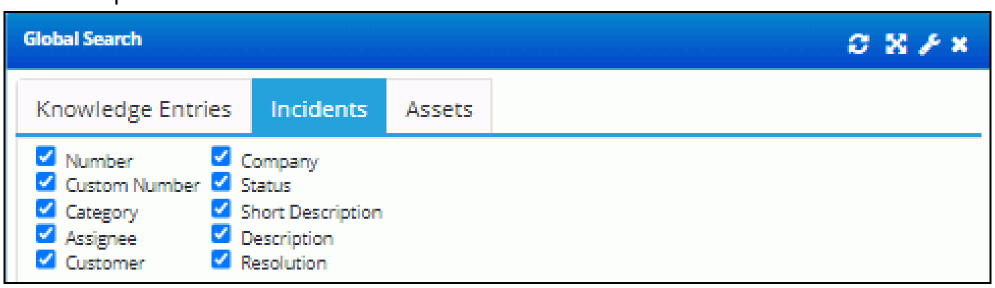


Global Search

The Global Search component displays a dialog for searching iSupport data using keywords and, if searching knowledge, Boolean operators (And, Or, Not as well as parenthesis to group words and phrases). Select the record types/features to search via the Entity Types field in the component configuration dialog; available record types/ features are specified in the Dashboard Settings and Rep Groups screens in configuration.

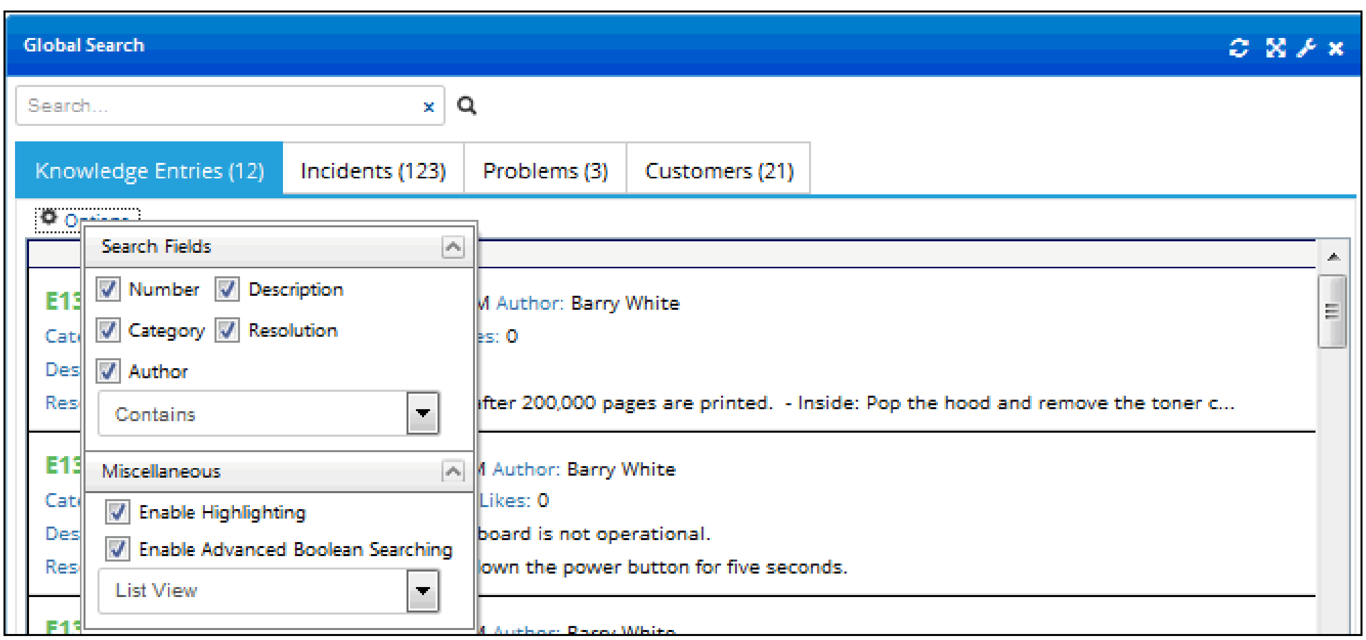


Use the configuration option to select the fields to be searched.



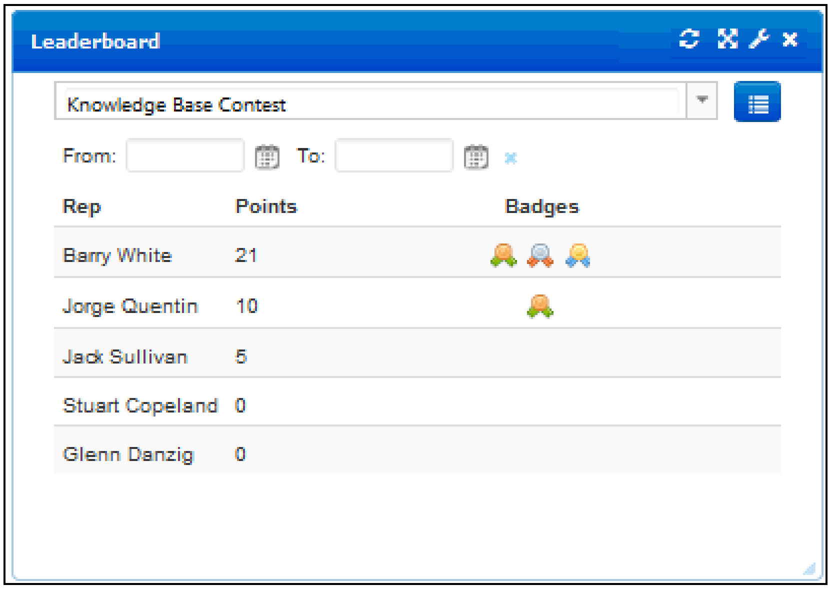
Use the Search Number Only checkbox to have the search override your configured global search settings and limit the search of each selected work item type to only include the work item number field. Note that the search uses the Contains operator.

Use the Options link on each tab to select the fields to search, the type of search (Starts With, Contains, Ends With and Is), enable text highlighting, and select the type of view in which search results are displayed (list or classic).

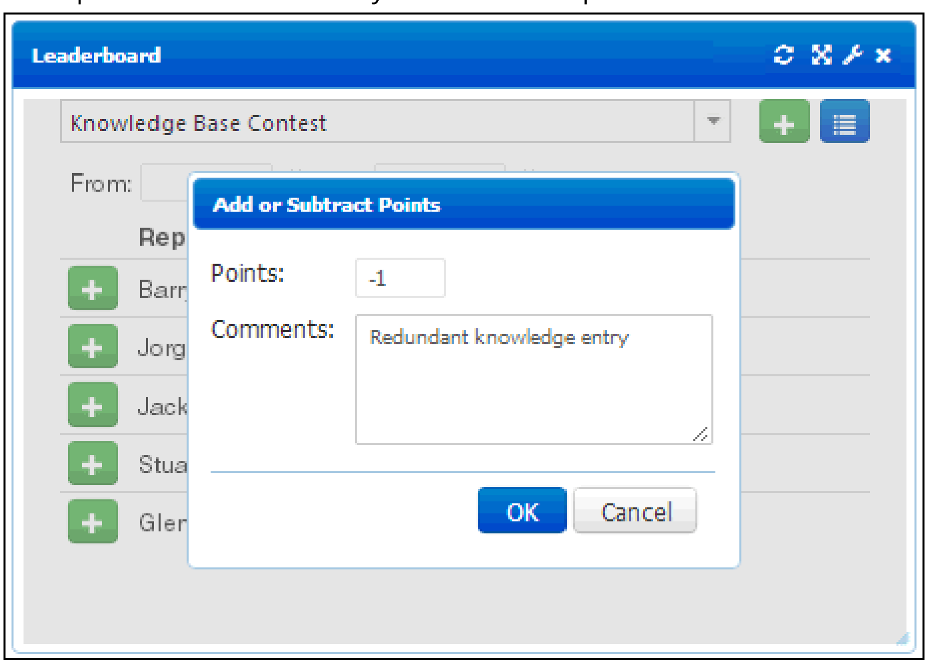


Leaderboard

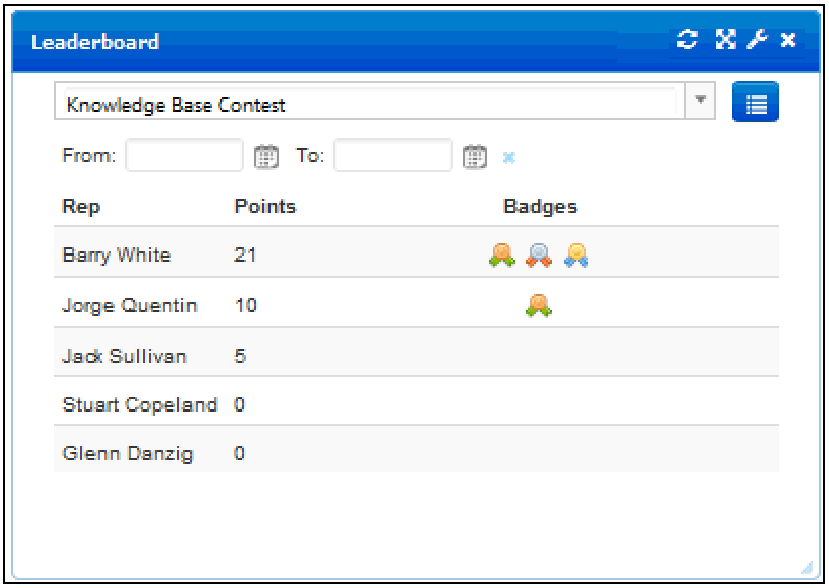
Use the Leaderboard component to create contests with configurable award levels, action-based point values, and badges (icons) to display when an award level is reached. Points can be awarded manually or assigned automatically based on completion of an iSupport action. Note that the dates in the From and To fields are for display filtering only; these fields do not affect point accumulation.



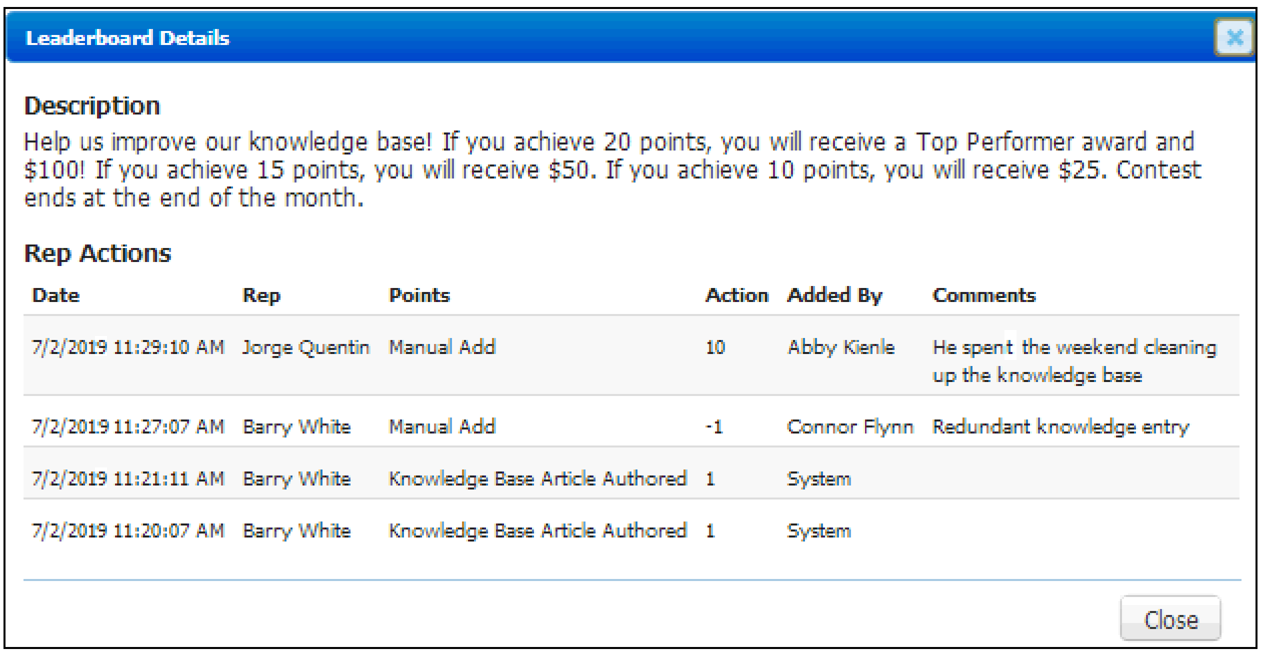
The Create New Leaderboard option will display next to the leaderboard dropdown for support representatives with Rep Manager Administrator access. The Add or Subtract Points option will display next to participant names for any support representative designated as a Leaderboard Manager in the Leaderboard component configuration; this enables the support representative to manually add or remove points.



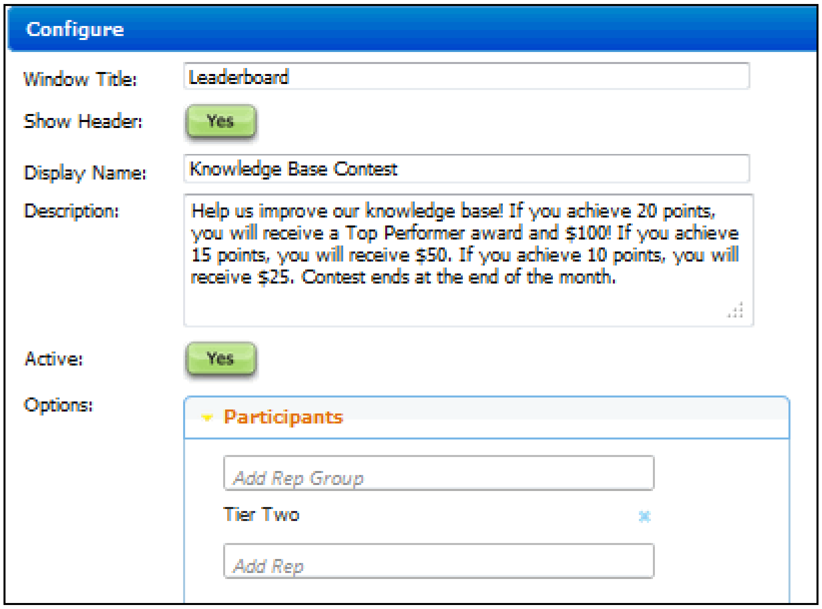
A leaderboard will appear to a support representative without Rep Manager Administrator access or Leaderboard Manager designation as follows:



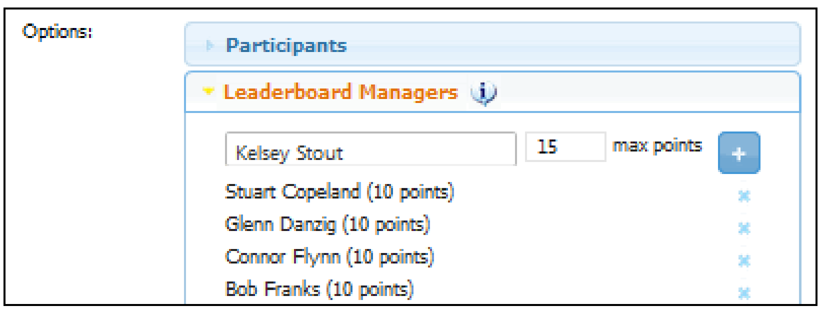
The Leaderboard Details option displays the leaderboard description and a history of how points were added and removed.



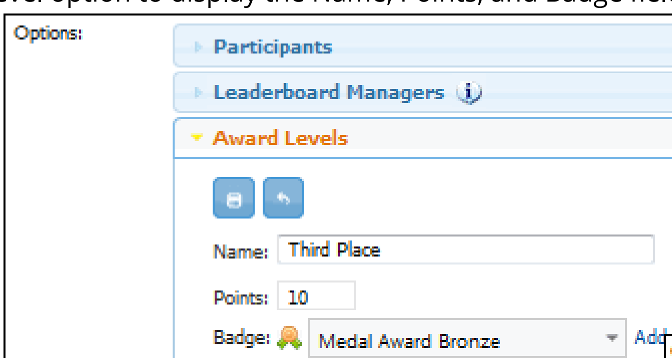
To configure a leaderboard, first enable the Leaderboard component in the Dashboard Settings screen. After clicking the Create New Leaderboard option to create a leaderboard, enter descriptive details in the upper portion of the dialog. Then include support representatives for the leaderboard via the Participants section in the Options field.

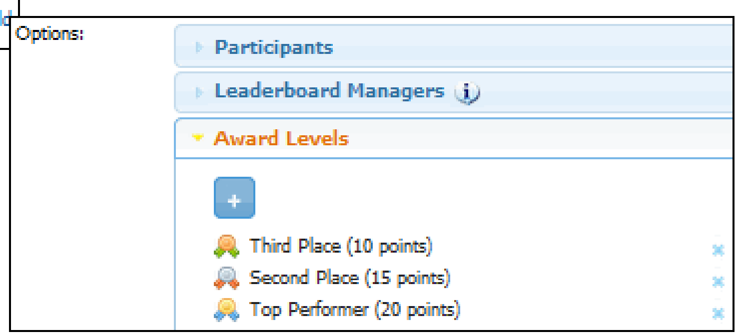


Use the Leaderboard Managers section to enable support representatives to manually award points up to a specified maximum.

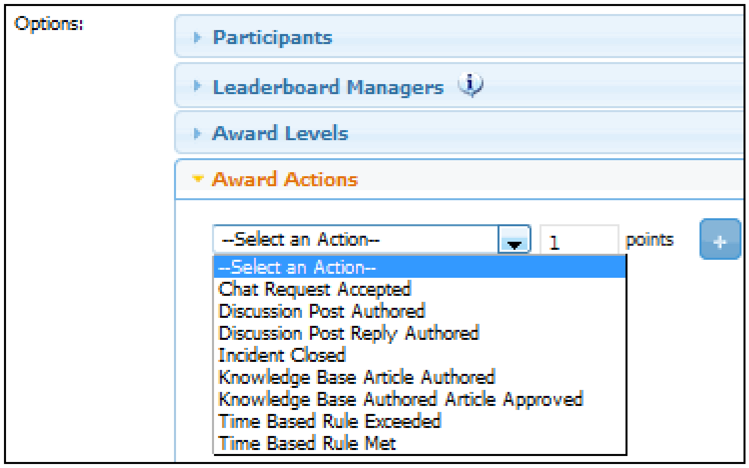


Use the Award Levels section to enter the name, points, and badge icon for each award level. Click the Add Award Level option to display the Name, Points, and Badge fields; use the Save Award Level option to save your entries.





Use the Award Actions section to select the iSupport actions and corresponding point amounts that will be awarded automatically when the action is accomplished.

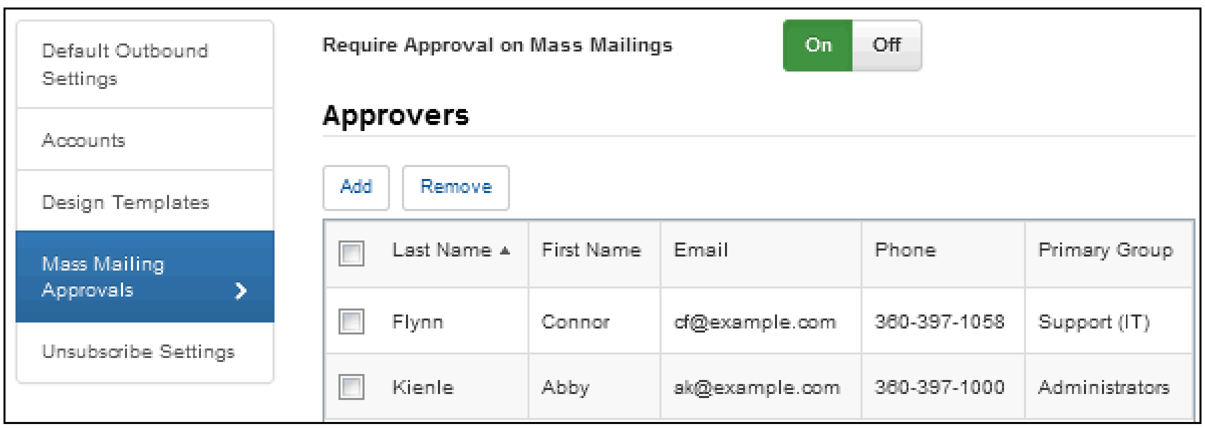


Mass Mailing/Approvals

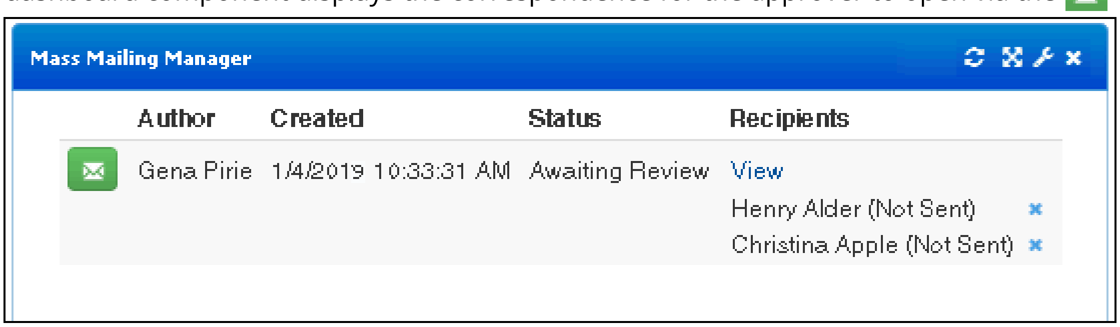
iSupport's Mass Mailing Approvals feature requires approvals on any correspondence sent from a customer view. The Mass Mailing component includes correspondence that is awaiting approval or has been rejected by an approver.

To configure this feature:

- Enable required approvals and designate approvers via the Mass Mailings screen.

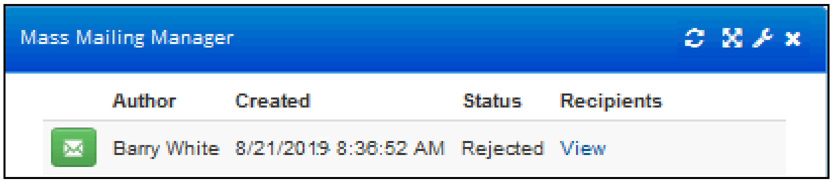


- Use the Dashboard Settings screen to make the component available for the author and approver to add to a dashboard.
- When the author creates a correspondence from a customer view and clicks the Send button, the Mass Mailing Manager dashboard component displays the correspondence for the approver to open via the Open option.



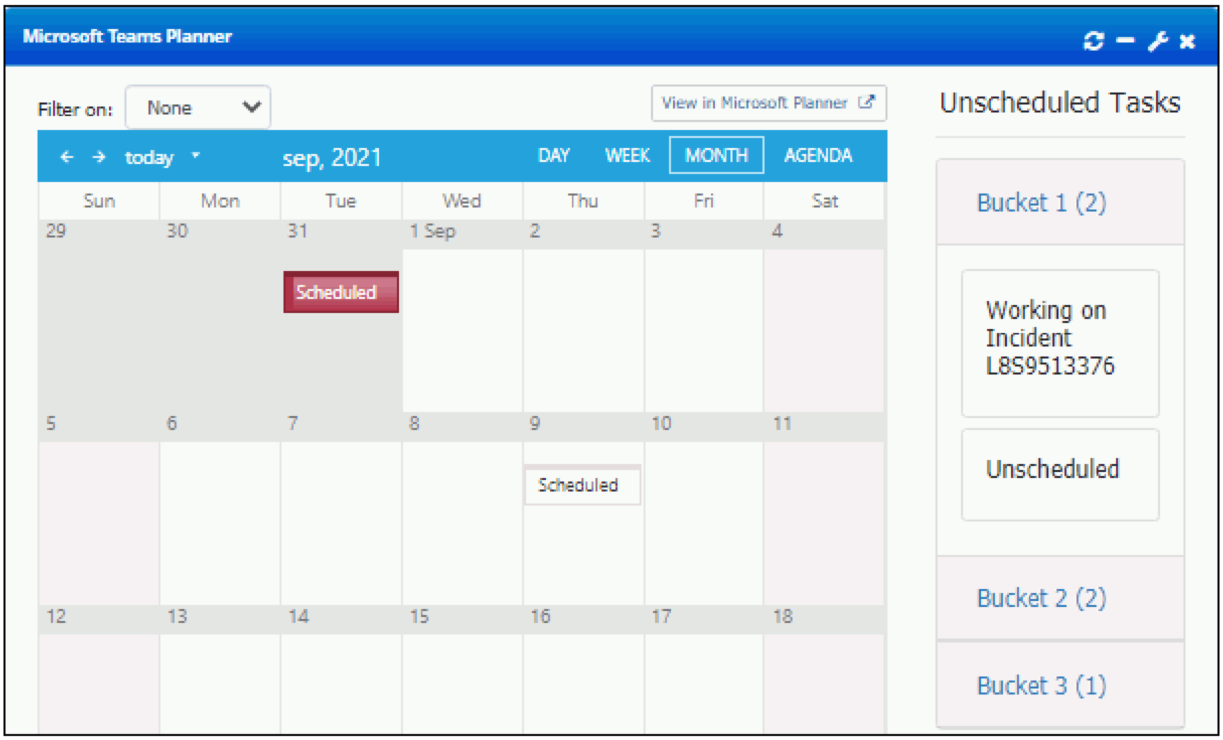
Approvers can use the Reject button in the Correspondence screen to prevent the correspondence from being sent, or the Send button to send the correspondence.

The correspondence will display to the author in the Mass Mailing Manager.



Microsoft Teams Planner

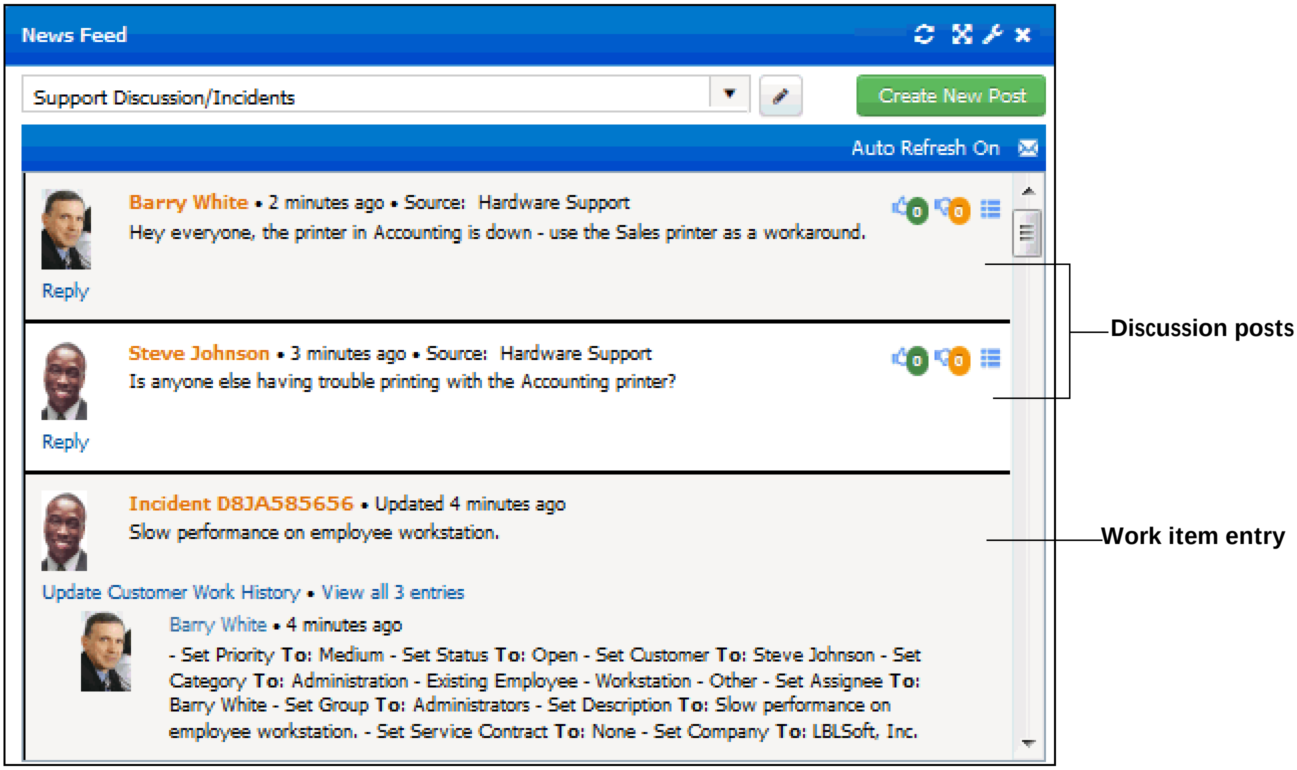
If you have enabled iSupport's Microsoft 365 Teams integration, you can use the Microsoft Teams Planner component on the iSupport Desktop to view and access scheduled and unscheduled Microsoft Teams tasks. Select an item in the task list to display it in the Planner application.



News Feeds

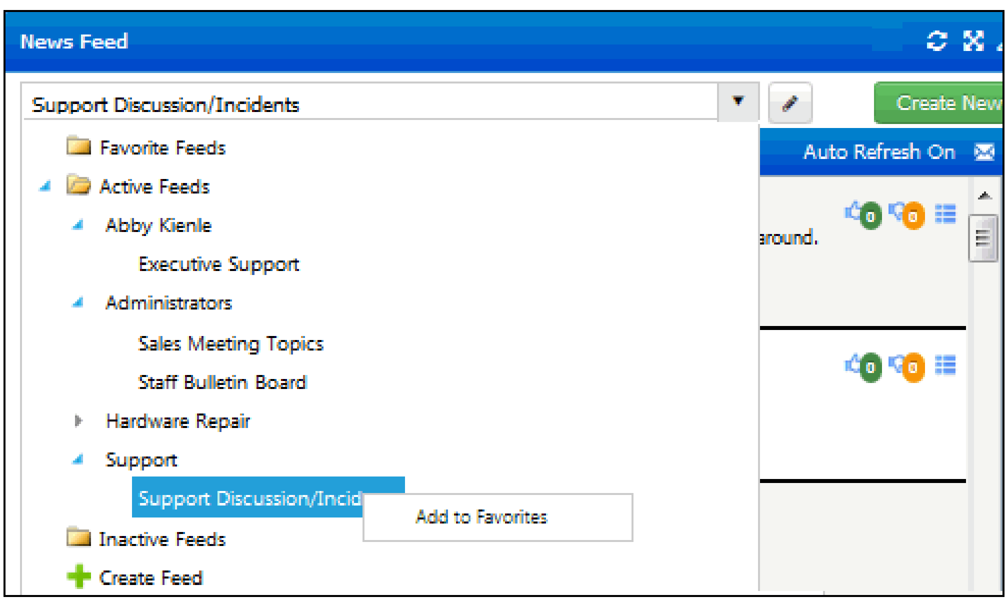
The News Feed component contains feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See "Configuring News Feed Basics"

on page 38 for information on creating feeds and setting feed options.



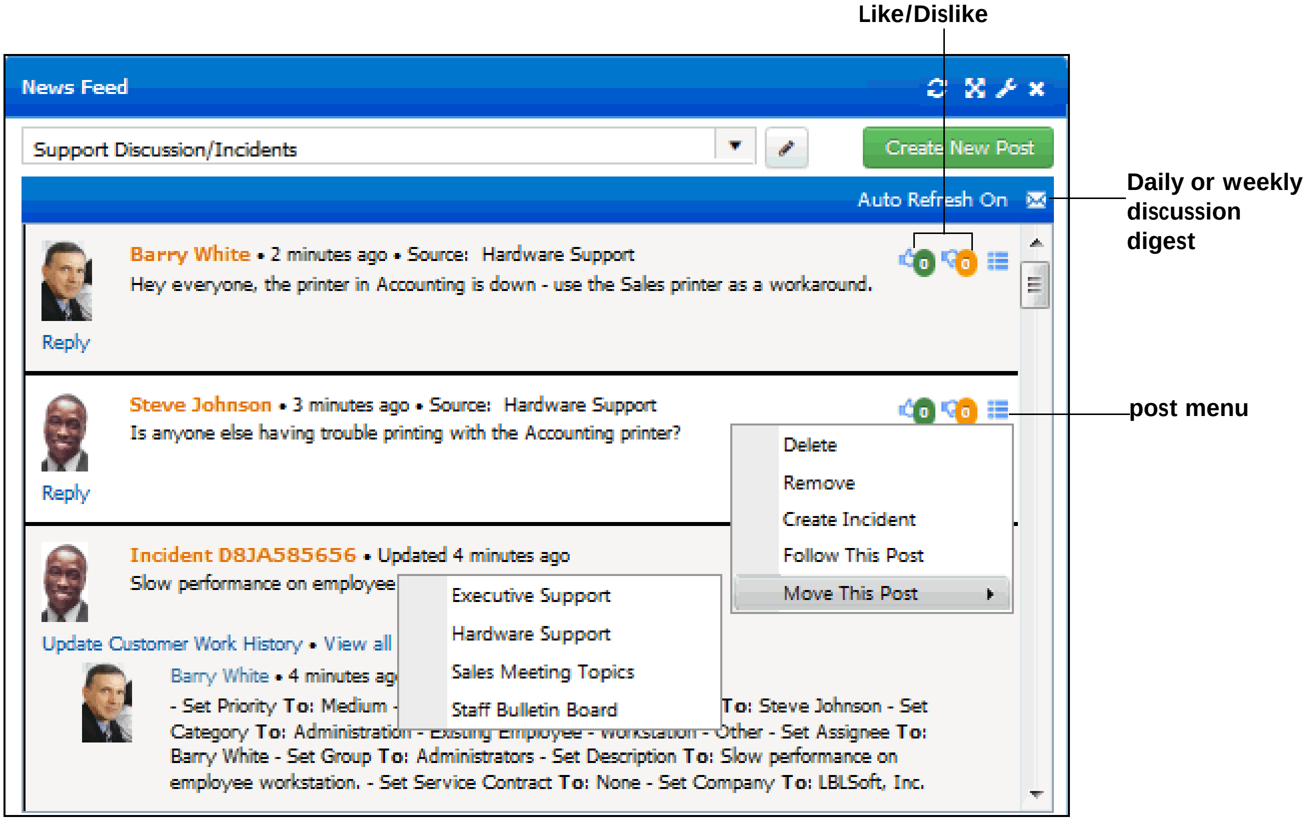
Use the Auto Refresh On link at the top of a feed to stop the news feed from automatically refreshing (but replies and your posts will still appear). The pause will be released when you manually refresh the component, create a post, or when the page is reloaded.

News feeds are listed in the dropdown by support representative group or by support representative. Right-click on a news feed in the list to add to your Favorite Feeds folder.



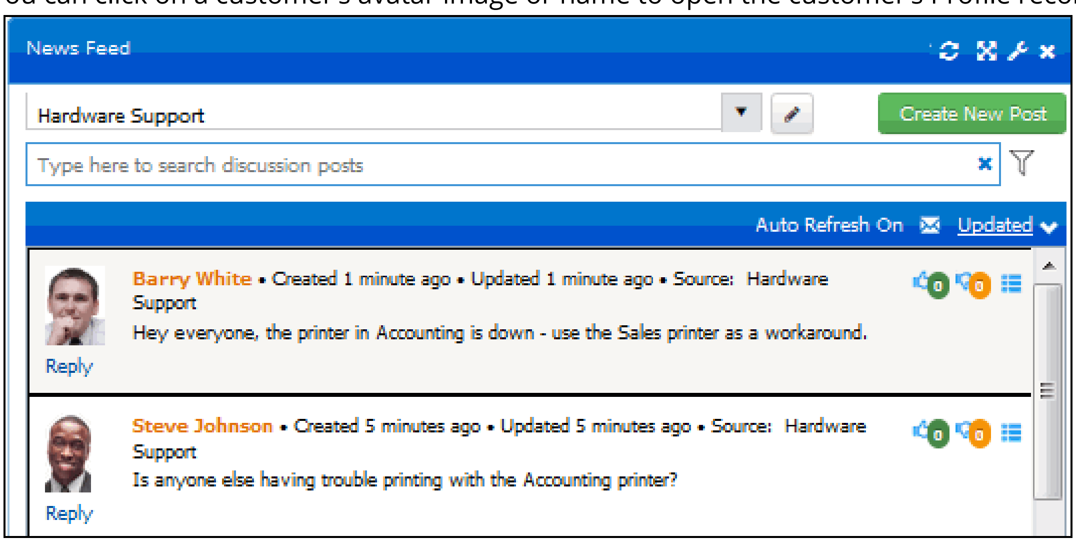
Work item entries contain updates for incidents, problems, changes, and purchases; support representatives with the Update via News Feed permission can use the Update Customer Work History link to add work history to the item.

Discussion posts are entered by support representatives in news feeds on the iSupport Desktop and by customers in news feeds on the mySupport portal. Post entries contain Like/Dislike icons and a post menu; discussion-only feeds include searching and a daily/weekly discussion digest feature.

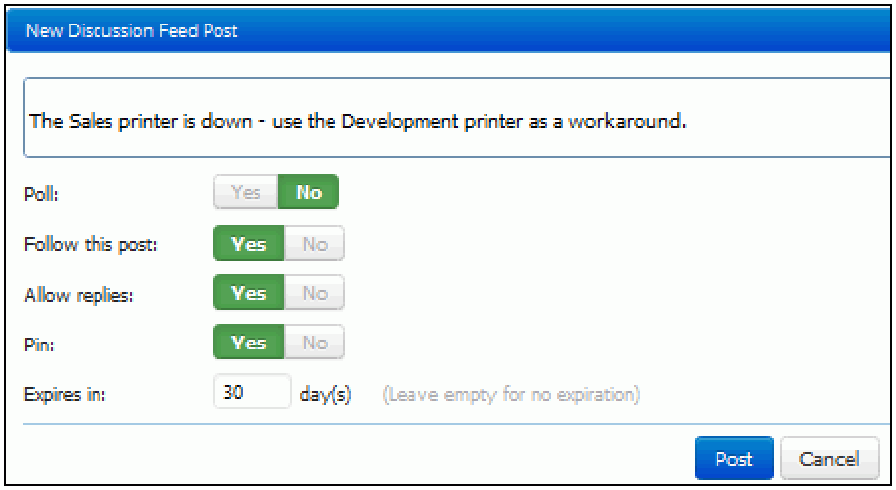


Note that you can manage a customer's discussion feed subscriptions via the Discussion Feed Subscriptions field in the customer's Profile record.

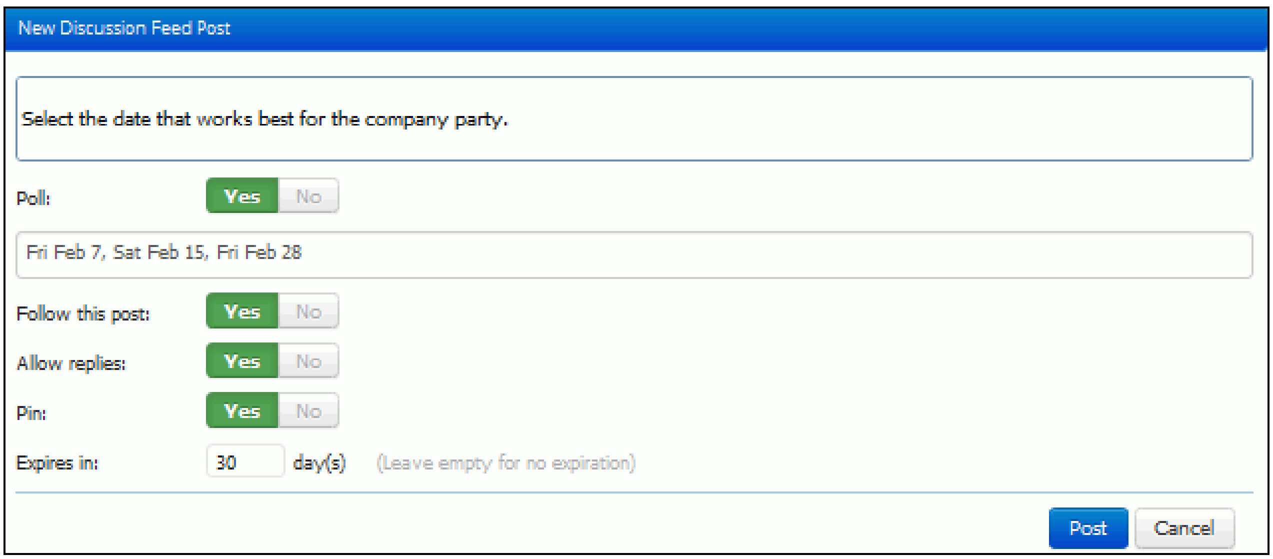
News feeds that contain only discussion posts will include a search field for performing a literal (but not case sensitive) search for a character string within all posts in the feed; click the Filter icon to refine the search by support representative or customer. Use the Add Condition + and Remove Condition − icons to add or remove search filters. You can click on a customer's avatar image or name to open the customer's Profile record.



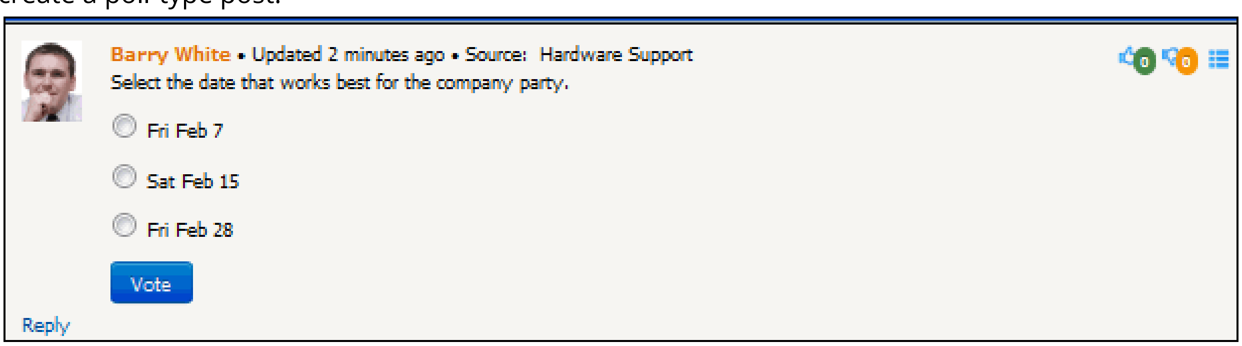
- Use the **Create New Post** button to create a discussion post to appear in the feed. You can include images in this field.



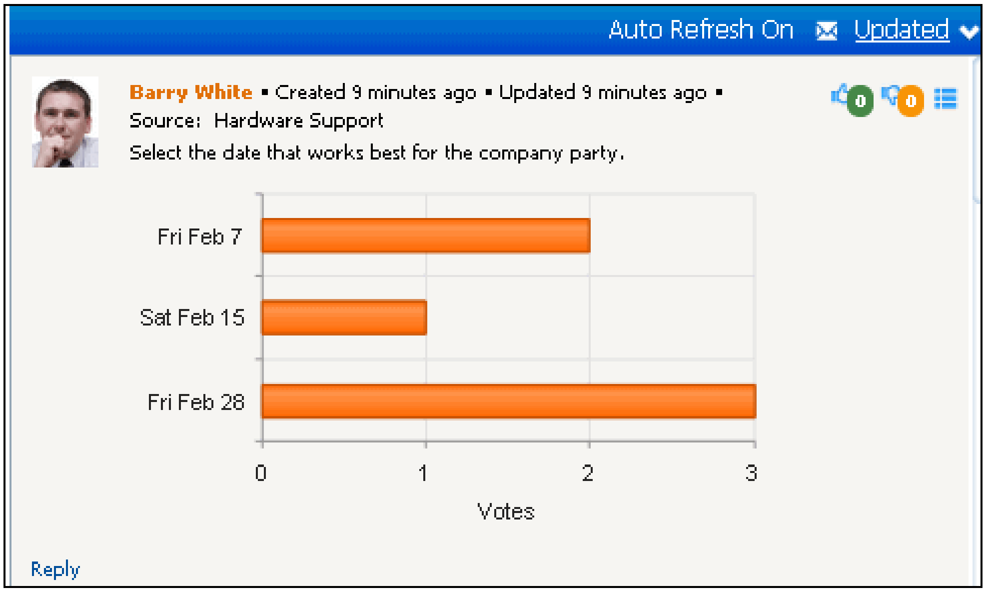
Poll - This field displays if rep polls are enabled for the feed. Select Yes to create a list of options in a poll-type post with radio button response options in discussion-only news feeds on the Desktop and mySupport portal.



Poll posts will display only to authenticated users, and a user can only vote once on a poll. Polls can be disabled for a news feed, and only support representatives with Discussion Administrator permission can create a poll-type post.



Results will appear in a graph after a user selects a response:

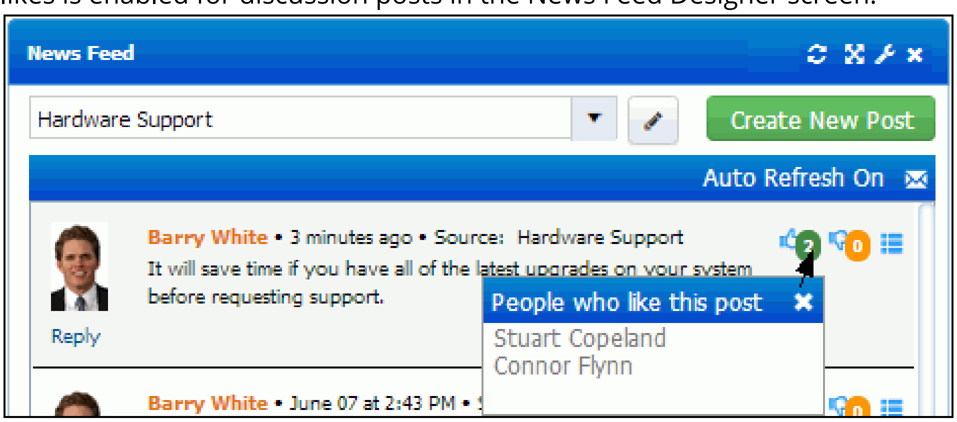


Follow this post - Select Yes to enable an email notification to be sent when someone replies to the post. Notification content is selected in the Rep Follow Notification and Customer Follow Notification fields in the Discussion Posts section in the News Feed Designer. The Follow option is also included in the Create Discussion Post dialog; a Default for Follow Option on Discussion Posts field is included in the Preferences screen (accessed via the Desktop menu) for setting a default for the Follow option in the Create Discussion Post dialog and in the Reply field on a discussion feed.

Allow replies - Select Yes to include the Reply link on the post.

Pin/Expires in - Select Yes to retain the post at the top of the feed for you and others viewing the feed. A pin option will appear on pinned posts. Use the Expires In field to enter the number of days in which the post should be pinned or leave it blank to pin the post indefinitely.

- Use the **Like** or **Dislike** options to register a like or dislike; you can click on the icon again to withdraw it. You can display the names of support representatives and customers who have liked and disliked discussion posts by hovering over the Like or Dislike options; this popup will not appear if Anonymous Likes or Anonymous Dislikes is enabled for discussion posts in the News Feed Designer screen.



- Select **discussion digest** to subscribe to an email regarding discussion activity that can be sent daily or weekly. It is sent on the schedule of the Discussion Digest agent that is configured via the Global tab in the Agents screen. The email will list the number of new posts and replies for the day or week, as well as a link to the discussion feed. Use the Send Email After New Post option to enable an email to be sent every time a new post is added to the feed; use the Discussion Post Custom Notifications screen to customize this notification.

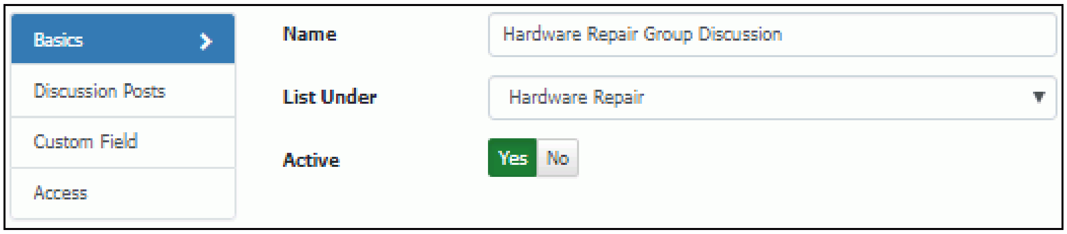
Use the following options on the discussion post menu:

- The **Delete** and **Remove** options appear if you have Discussion Feed Administrator access and the Allow Post Deletion and Allow Post Removal options are configured. Deletion will delete the post entirely; removal will hide a post from other participants viewing the feed but the post will 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. If you do not have Discussion Feed Administrator access, you will not be able to delete your own post. Note that an administrator can also remove or delete a post via a screen in configuration. A customer can remove a post that they created if there is no reply; this will delete the post entirely.
- The **Create Incident** option appears for posts submitted by customers via the mySupport portal; select to open the Incident screen with the customer selected and the post in the Description field.
- The **Follow This Post** option enables an email notification to be sent when someone replies to the post. Notification content is selected in the Rep Follow Notification and Customer Follow Notification fields in the Discussion Posts section in the News Feed Designer. The Follow option is also included in the Create Discussion Post dialog; a Default for Follow Option on Discussion Posts field is included in the Preferences screen (accessed via the Desktop menu) for setting a default for the Follow option in the Create Discussion Post dialog and in the Reply field on a discussion feed. An Author Following option will appear when a discussion post author follows a post that they have submitted.
- The **Move This Post** option appears if you have the Discussion Feed Administrator designation in your Support Representative Profile record and the Allow Move option is selected in the News Feed Designer. An email will be sent to the author of the post with the post creation date/time, previous feed and new discussion feed in which the post is now included, and the post content.
- The **Share This Post** option appears if the Allow Rep Share option is configured for the news feed. It enables support representatives to share a discussion post via email. The Correspondence screen will appear to the support representative for using include fields for inserting information related to the discussion post. If the Allow Customer Share option is configured for the news feed, customers can share discussion posts on the mySupport portal via the Share This Post icon; the customer's mail client will appear with the content of the post and a link to the post.
- The **Get Share Link** option appears if the Allow Rep Share option is configured for the news feed. It displays a Discussion Post Share Link dialog for copying a link to a post to the clipboard.
- **Merge This Post** to move a post under another post. After selecting this option a search dialog will appear with other posts in the feed. Click the date/time link to select the post to which the current post should be moved. Any replies to a post are also moved.
- **Disallow Replies to This Post** will prevent the Reply link from appearing on a post.
- The **Pin This Post** option retains the post at the top of the feed for you and others viewing the feed. After selecting this option, a Pin Expiration dialog will appear for you to specify no expiration or the number of days for the post to be retained. A pin option will appear on pinned posts.
- The **Edit This Post** option appears for 15 minutes after a post is entered, if a reply has not been posted. Customers edit discussion posts on the mySupport portal via an Edit option.

- A **Create Knowledge Entry** option will appear to enable creation of a new knowledge entry from a discussion post. The post will be included in the knowledge entry Description field, and the most recent reply will be included in the Resolution field.

Configuring News Feed Basics

To create a news feed, you can select Create Feed in the News Feed component dropdown, or select News Feed on the Create menu in the Content Manager. To configure an existing news feed, you'll need Discussion Feed Administrator access in your Support Representative Profile record; select the Edit option next to the feed name in the News Feed component.



Name - Enter the name for the news feed.

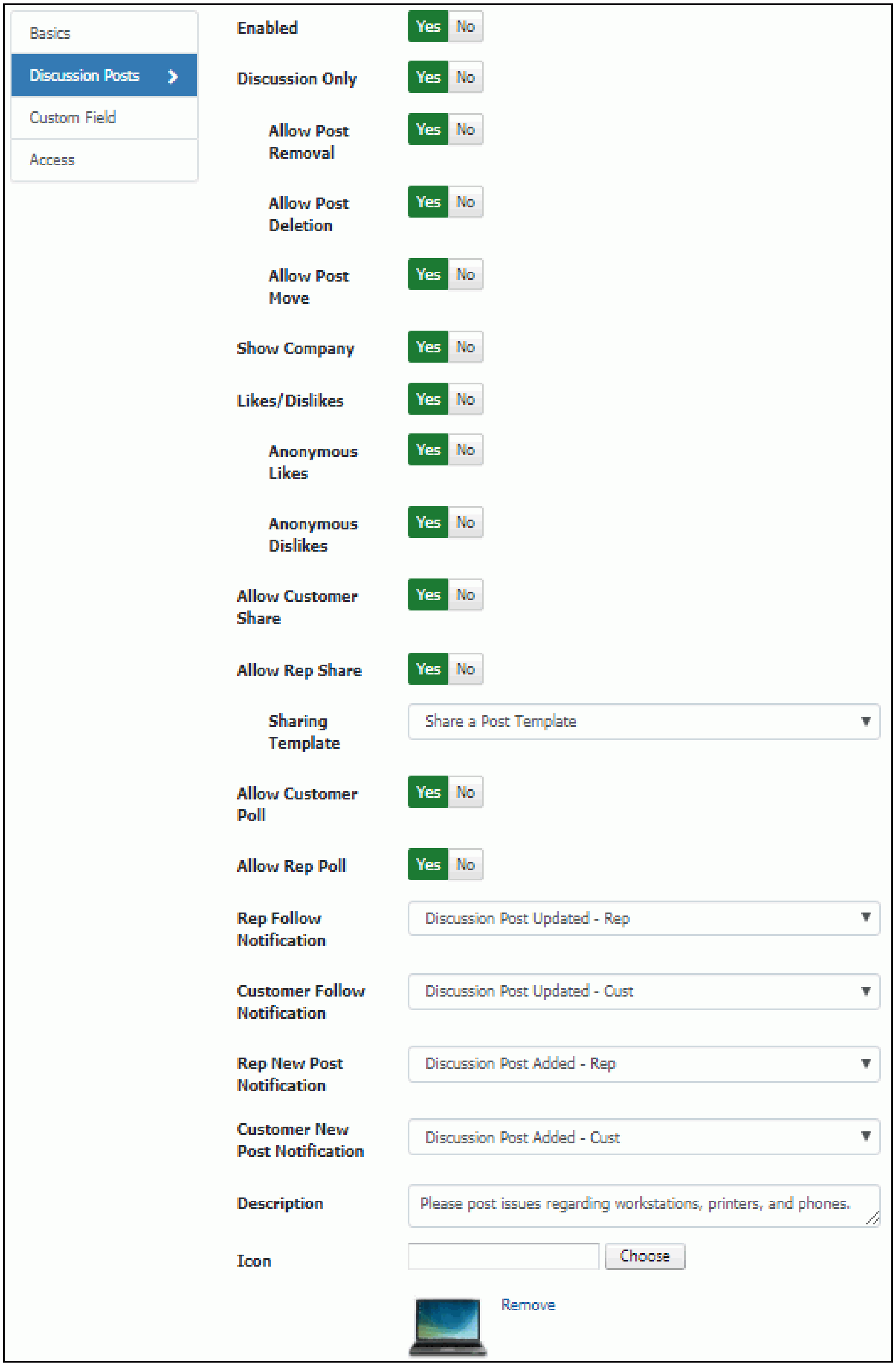
List Under -This field determines how to list the news feed in the Active Feeds folder in the news feed dropdown; select My Name to list the news feed under your own name or select a group to list a shared news feed under the name of one of your groups.

Active - Select No in this field to remove the feed from the Active Feeds folder in the news feed dropdown and include it in the Inactive Feeds folder. This will make the feed read-only - support representatives will still be able to view the feed and any discussion posts in the feed will be included in global searches. The feed will be removed from the mySupport portal.

If you have Discussion Feed Administrator access (enabled in your profile record), you can create shared feeds that can be viewed by others.

Configuring Discussion Posts

You can include discussion posts, work item updates, or both in news feeds. Note that you can manage a customer's discussion feed subscriptions via the Discussion Feed Subscriptions field in the customer's Profile record. If it is a feed that includes only discussion posts, applicable fields will appear as shown in the example below.



Enabled - Select Yes to include discussion posts in the news feed.

Discussion Only - Select Yes to field will appear to include only discussion posts in the feed. The following fields will appear:

- **Allow Post Removal** - If it is a discussion-only feed, select Yes to enable any support representative with Discussion Feed Administrator access to remove a discussion post in the feed. This will hide the 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.
- **Allow Post Deletion** - If it is a discussion-only feed, select Yes to enable any support representative with Discussion Feed Administrator access to delete a discussion post in the feed. This will delete the post entirely.
- **Allow Post Move** - If it is a discussion-only feed, select Yes to enable any support representative with Discussion Feed Administrator access to move a discussion post and all of its replies to another discussion. The following email will be sent to the author of the post:
  Subject: Discussion Post Moved
  Body:
  This discussion post has been moved:
  - Created: <*creation date and time*>
  - Old Discussion Feed: <*previous discussion feed*>
  - New Discussion Feed: <*discussion feed in which post is now included*>
  - Message: <*post content*>
  This email will not be sent if the person moving the post is not the author of the post.

Show Company - Select Yes to include the following in the avatar hover text for a discussion post; the hover text can be changed for the mySupport portal via the Resource Editor.

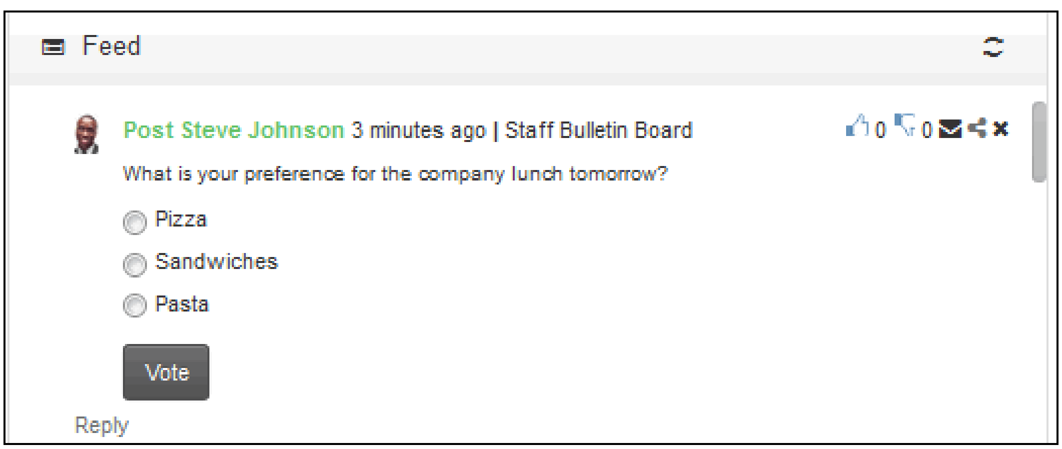
- "works at <*company*>" after the customer's name on a customer post on both the Desktop and the mySupport portal
- "forum representative" after the support representative's name on a support representative post on the mySupport portal

Likes/Dislikes - Use this field to include Like and Dislike options on each discussion post. You can display the names of support representatives and customers who have liked and disliked discussion posts by hovering over these icons; select the **Anonymous Likes** or **Anonymous Dislikes** options to prevent display of these names.

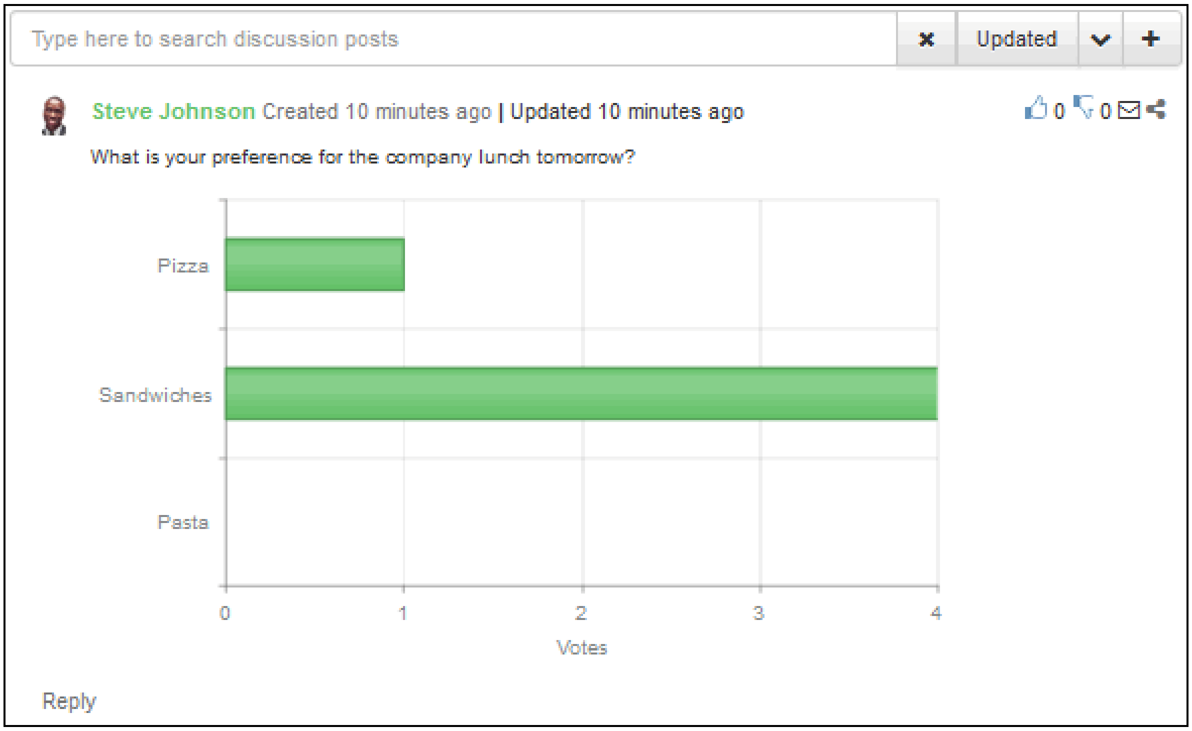
Allow Customer Share - Select Yes to enable customers to share a post via the mySupport portal. When a customer selects the Share This Post option, the customer's mail client will appear with the content of the post and a link to the post.

Allow Rep Share - Select Yes to enable the Share This Post option for support representatives to share a discussion post via email. Use the Sharing Template field to select a predefined correspondence template that will be applied in the Correspondence screen; include fields can be used to insert information related to the discussion post.

Allow Customer Poll - Select Yes to enable customers to create a poll-type post as shown in the example below:

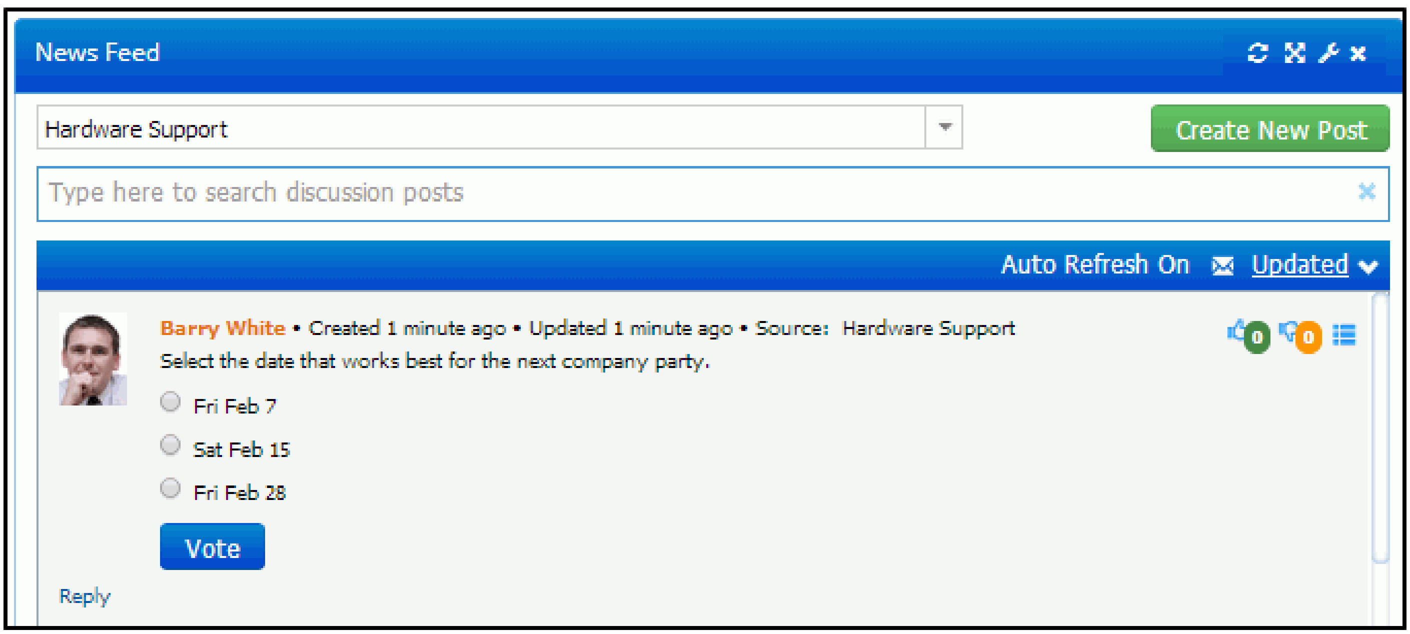


After the user selects a response, the results will appear in a graph as shown in the example below.

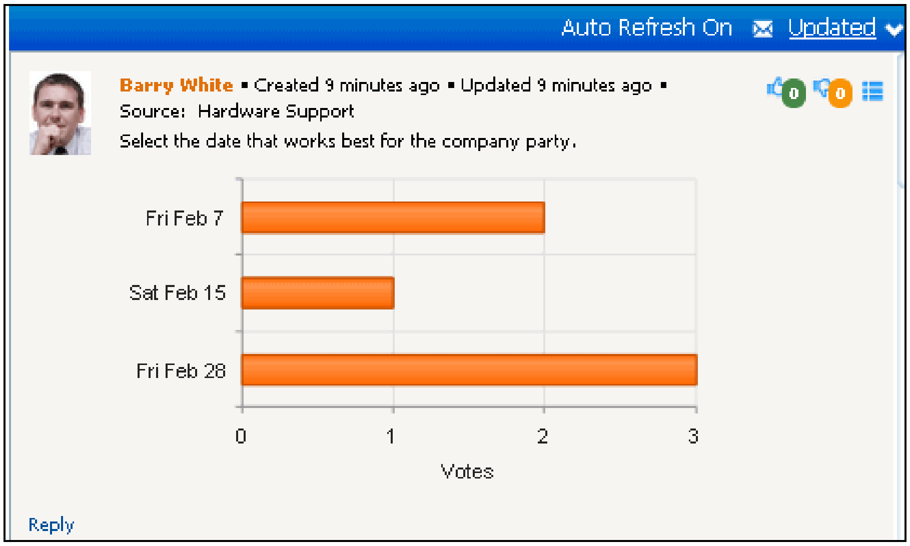


After a customer creates a discussion post, an Edit option will appear to the customer for 15 minutes. Note that poll posts will display only to authenticated users.

Allow Rep Poll - Select Yes to enable support representatives to create a poll-type post as shown in the example below.



After the user selects a response, the results will appear in a graph as shown in the example below.

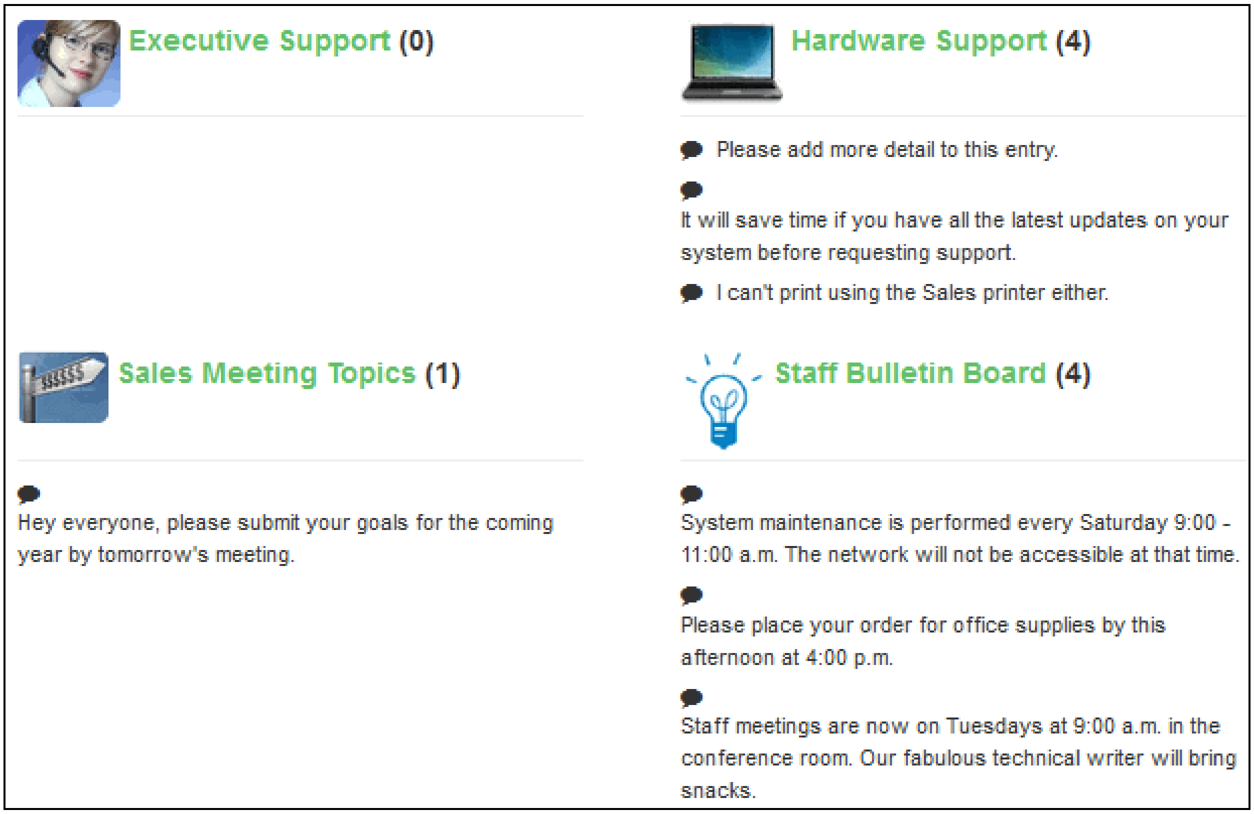


Discussion News Feeds - This field appears if No is selected in the Discussion Only field; use it to include entries from other shared discussion-only news feeds.

The following fields appear for discussion-only feeds:

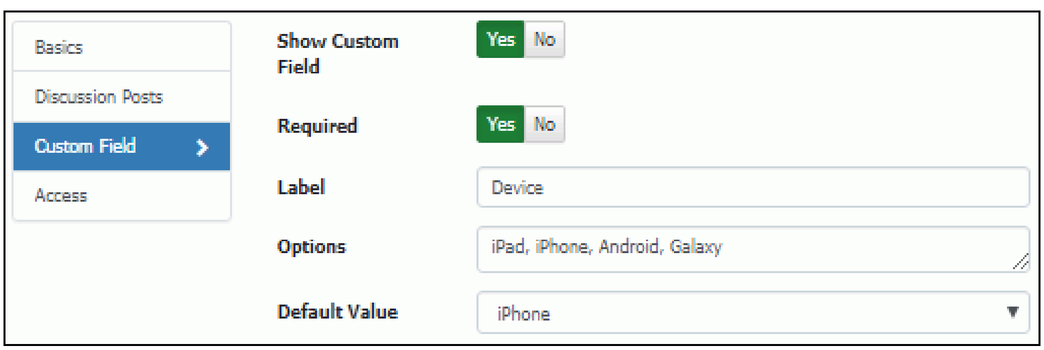
- **Rep Follow Notification** - Select the email notification to be sent if a support representative selects the Follow This Post option and someone replies to the post. These notifications are set up in the Configuration module.
- **Customer Follow Notification** - Select the email notification to be sent if a customer selects the Follow This Post option and someone replies to the post. These notifications are set up in the Configuration module.
- **Rep New Post Notification** - Select the email notification to be sent if a support representative adds a post to the feed.
- **Customer New Post Notification** - Select the email notification to be sent if a customer adds a post to the feed.
- **Description/Icon** - Use these fields to enter a description and icon for display on the mySupport portal; it will appear if you add a Discussion News Feed List link to a mySupport portal navigator. For the icon, your uploaded

image will be constrained to 64x64 pixels with the proportions locked. You can also display a link for displaying entries from all discussion-only news feeds and a link for displaying entries from one discussion-only feed.

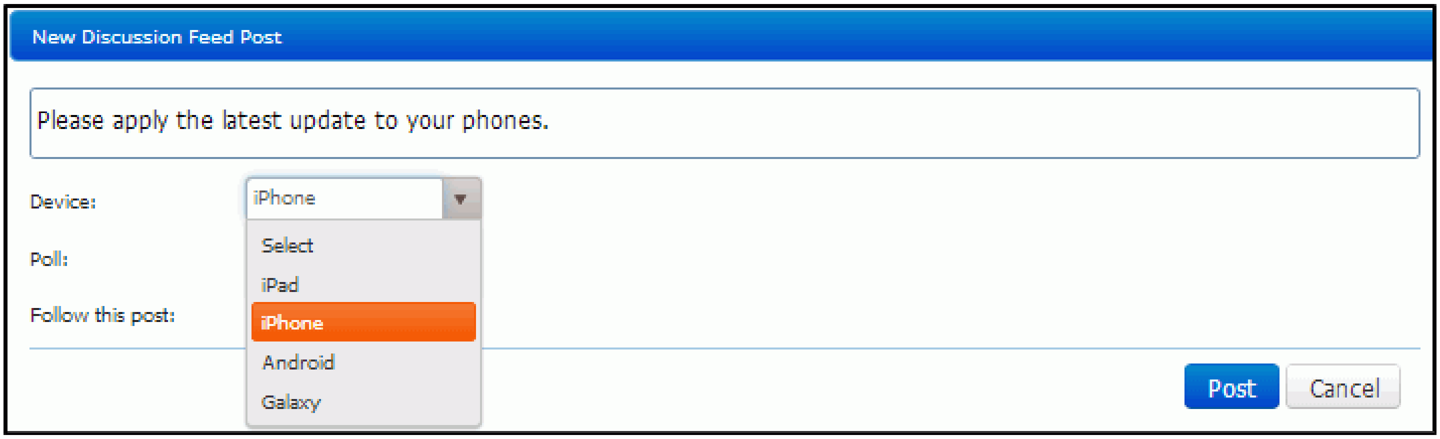


Configuring Custom Fields

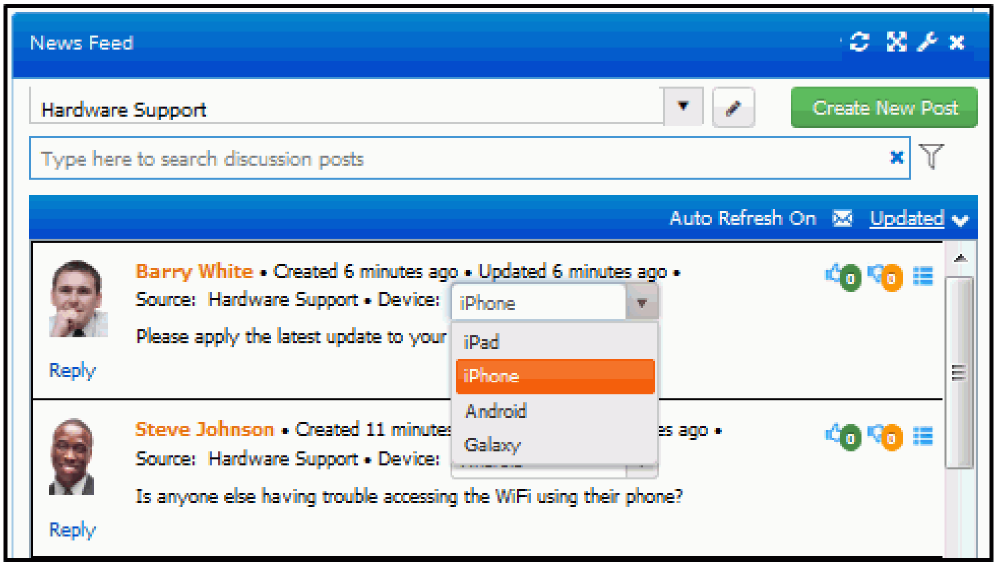
Use the Custom Field section to add a custom field to posts in a discussion-only news feed. You can make it required, enter options for selection (separate with a comma), and set a default value. Posts can be sorted by the custom field configured for a feed. Note that custom fields do not appear in replies.



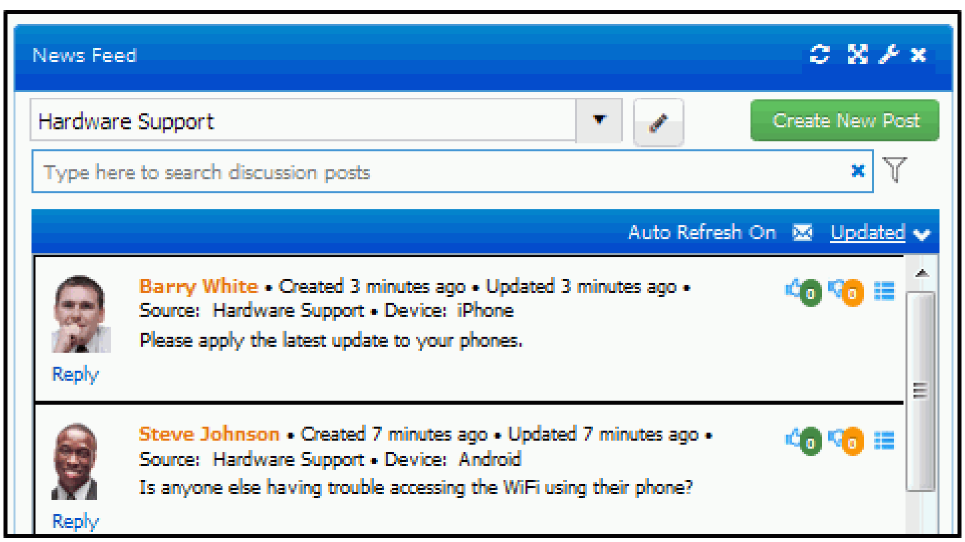
The field will appear in the New Discussion Feed Post dialog as shown in the example below.



The custom field will appear as follows to support representatives with Discussion Feed Administrator access; another value in the dropdown list can be selected or a different value can be entered.

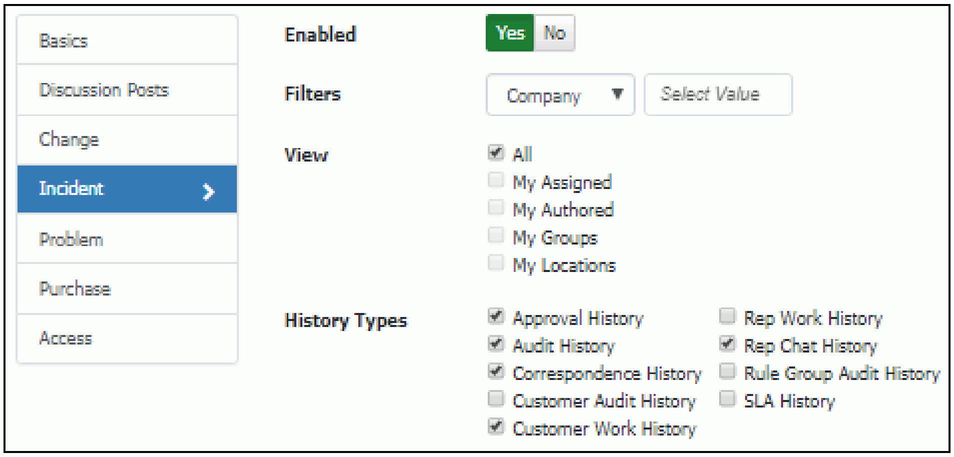


The custom field will appear as shown below to support representatives without Discussion Feed Administrator access.



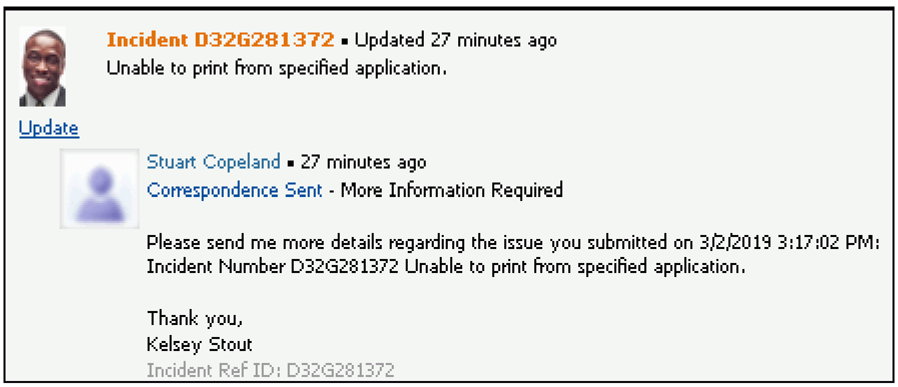
Configuring Work Item Entries

Work item tabs will appear if No is selected in the Discussion Only field on the Discussion Posts tab. Use the work item-specific tabs to restrict display of work items; you can display only work items for a specified field value, view, and history type.



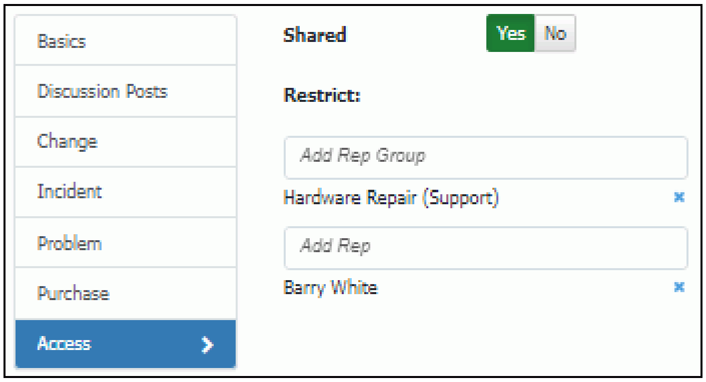
Use the Filters field to restrict content to a specified incident, problem, change, or purchasing value; for example, you can specify that only incidents for a specified company appear. Use the View checkboxes to restrict entries by assignment and authoring.

Use the History Type checkboxes to restrict entries to appear only if an action creates a work history entry of that type. As shown in the example below, if only the Correspondence History checkbox is selected in the History Types section, an entry will appear only if a correspondence is received or sent from a work item.

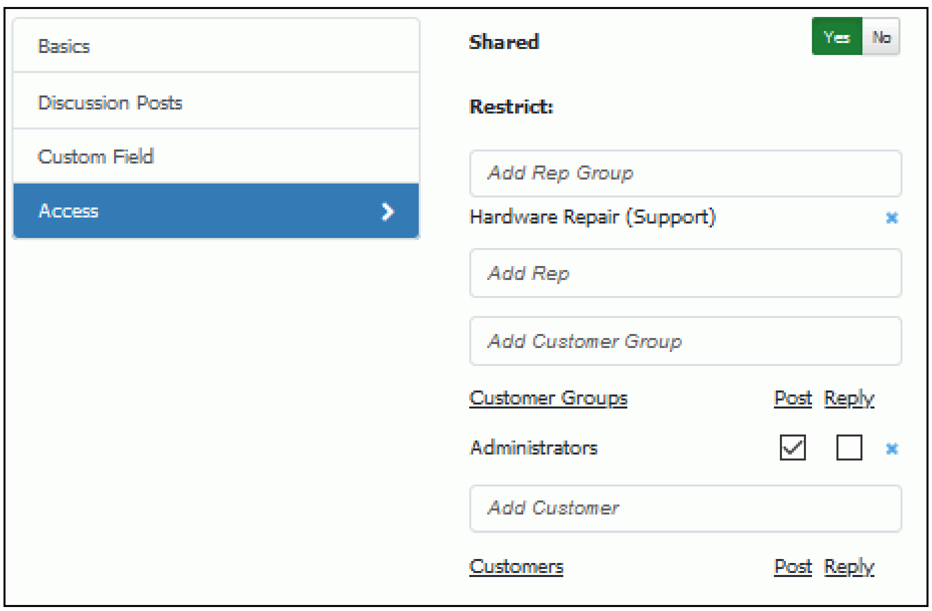


Configuring News Feed Access

The Access tab appears if you have Discussion Feed Administrator access in your Support Representative Profile record. Select Yes in the Shared field to enable representatives and customers to view feed entries. (If No is selected, only you will be able to view the feed entries.) You can restrict availability to selected support representative groups and individual support representatives (in addition to yourself). When you add a support representative group or support representative, feed entries will only be available to those support representatives; in the example below, feed entries would only appear to Barry White and members of the Hardware Repair group.



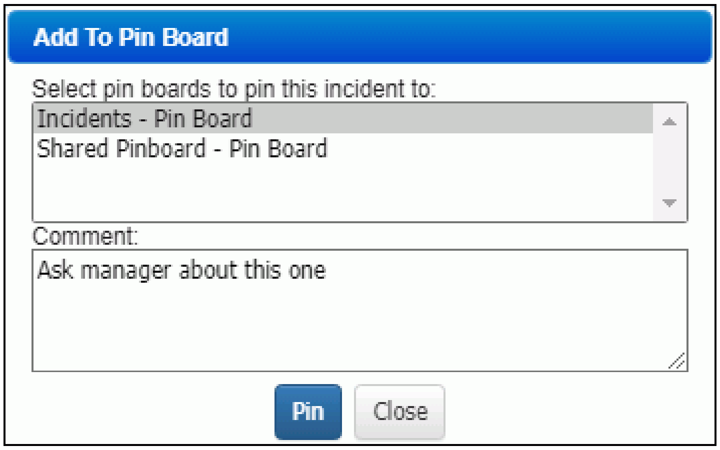
If it is a discussion only news feed, you can also restrict access for customer groups and individual customers. Use the Add Customer Group and Add Customer fields to select the customer groups and customers that can view feed entries. Use the Post checkbox to enable the Create Discussion Post link for a customer or customer group, and the Reply checkbox to enable the Reply link for a customer or customer group. Clear both checkboxes to restrict a customer or customer group to view-only access for a feed.



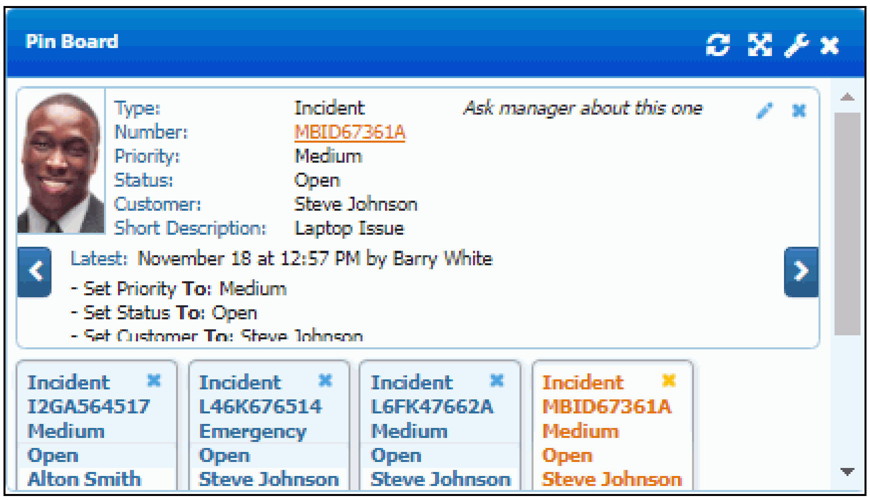
Note that you can subscribe a customer to a discussion feed and remove a subscriber from a feed (for example, if messages to a subscriber are returned) via the Discussion Feed Subscriptions field in the Customer Profile screen. Permissions for editing other personal news feeds are included in the Desktop Content Permissions configuration screen.

Pin Board

Use the Pin Board component to make selected incidents, problems, and changes visible on a Desktop pin board for tracking. After you have added the Pin Board component added to a dashboard, click the Pin Board option in the toolbar of a saved work item. The following will appear; select the pin board(s) on which the work item should be included and enter a comment for the item.



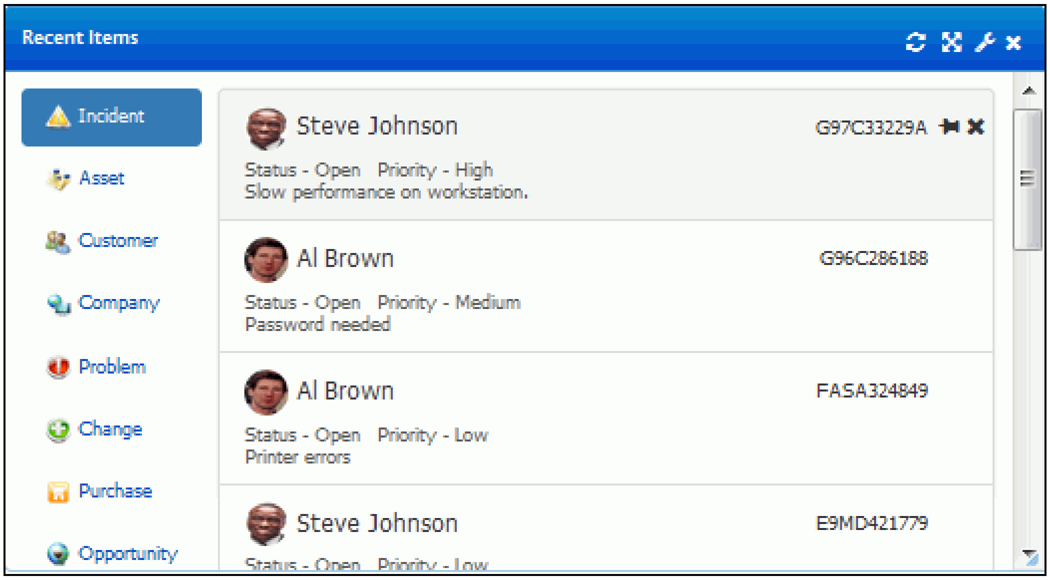
After selecting Pin, the work item will appear in the Pin Board component.



An Allow Reps With Dashboard Access To Add and Remove Items field is included in the Pin Board component settings on shared dashboards; it enables a support representative other than the dashboard author to edit a pin board if they have access to its dashboard and applicable work item permissions.

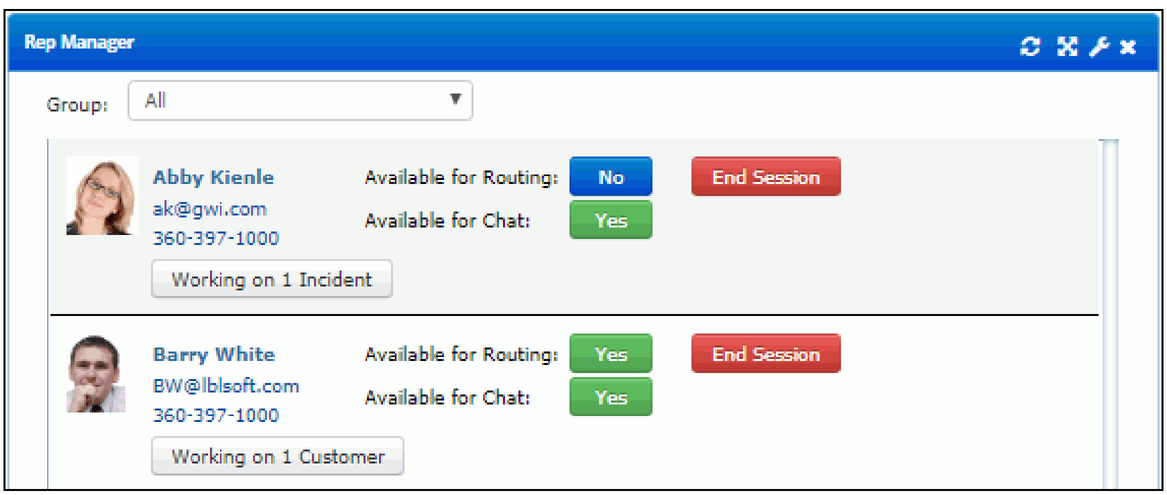
Recent Items

The Recent Items component displays the ten most recently accessed work items. Record types appear as tabs that can be reordered, removed, and re-added; use the icons in the upper right corner to pin to the top or remove an item. Multiple Recent Item components can be added to a dashboard.



Rep Manager

Use the Rep Manager component to control and access routing availability options, control chat availability, end a session, and access a work item that a support representative is working on. This component is available to support representatives with the Rep Manager Administrator option enabled in their Support Representative Profile record. The Rep Manager Groups tab in the Rep Profile screen will enable selection of the groups whose members will appear in the component for the support representative.



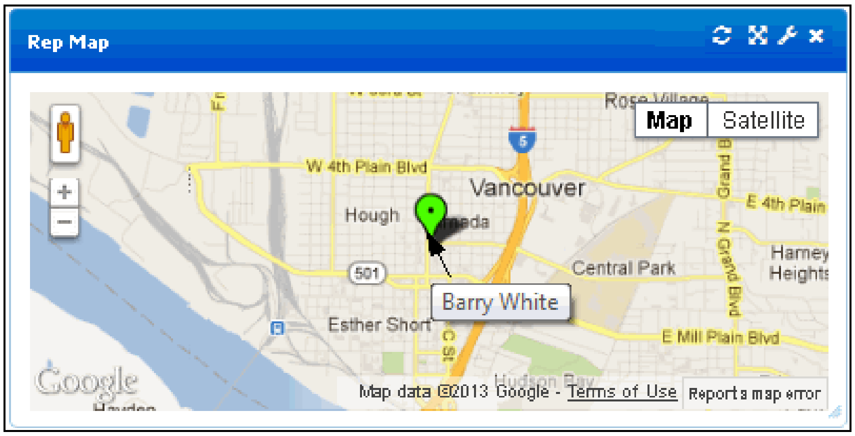
- Click on a **support representative's name** to display the Routing Availability tab in the Support Representative Profile screen in configuration and set individual routing options for the support representative.
- Click on an **email address** to start an email to the support representative using the default email client configured on your user client device, and on a **phone number** to start a call using your default telephone/dialer application.
- Use the **End Session** button to end a support representative's session to make a license available (if your company has a limited iSupport license). When a support representative isn't logged in, the date and time the support representative last logged in will appear in place of the End Session button.
- The **Available for Routing** button will display "Yes" if the support representative is available for routing incidents, changes, and problems (if enabled); click No to designate the support representative as unavailable for

routing. (The support representative will not be included in the selection dialog.) Note: Selecting No will exclude (for routing purposes) the support representative from all of the groups in which the support representative is assigned. However, it will not prevent assignment if a support representative is the default owner of incidents and changes submitted via a mySupport portal, an incident or change template, or email-submitted incidents.

- The **Available for Chat** button will display "Yes" if the support representative is logged in and scheduled for mySupport chat; click it to
- A **"Working on *<xx> <work item type>*"** button appears if the support representative has one or more work items open; click on the button to open the work items. You can initiate a chat if the Awareness Chat feature is enabled.

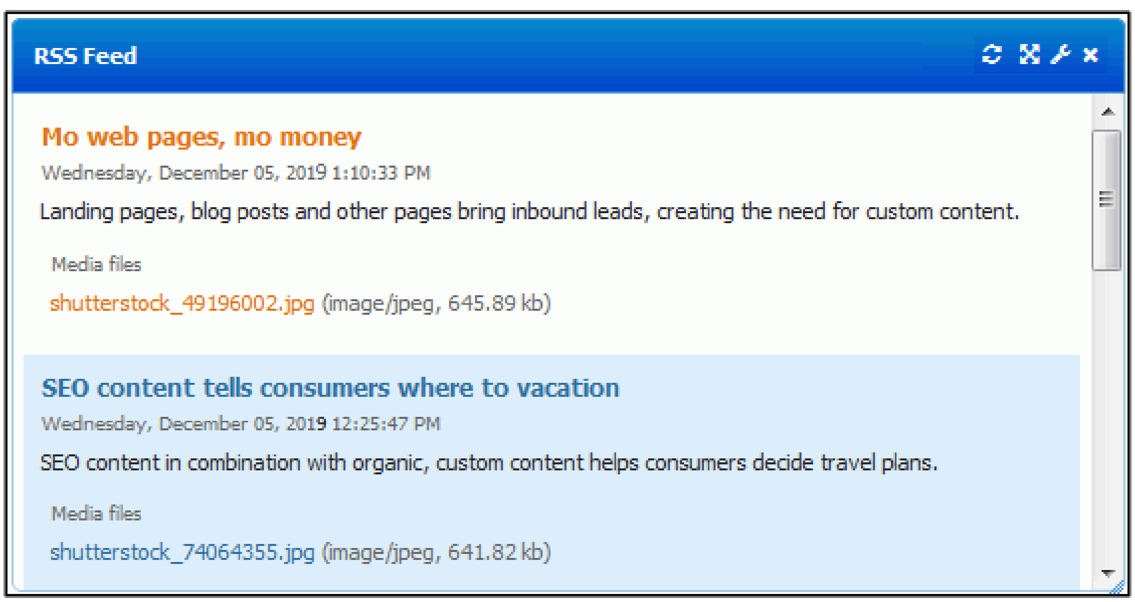
Rep Map

The Rep Map component displays the last known GPS location of any user logged into the mobile application. If using this feature on a mobile device, location services must be enabled on the device and on the browser. Use the Google Integration screen to configure this feature.



RSS Feed

Use the RSS Feed component to display an RSS feed for a web site. To configure this component, you'll enter the URL for the RSS feed (example: http://www.brafton.com/industry-news/headlines.rss) and the number of items to include in the feed.

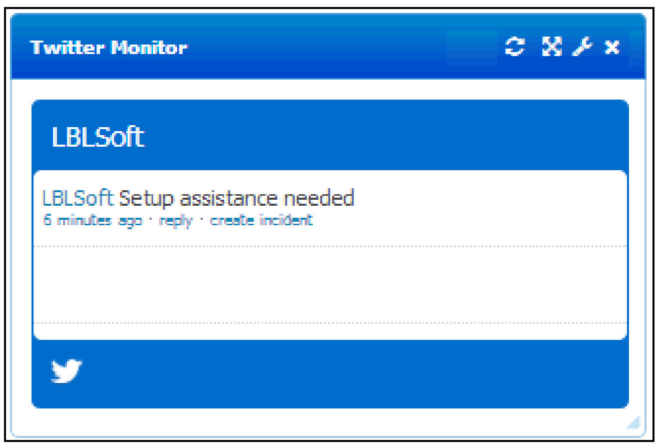


Twitter

The Twitter component displays a Twitter feed for a specified Twitter username. This component requires that Twitter integration is set up via Social Media Integration Configuration screen.

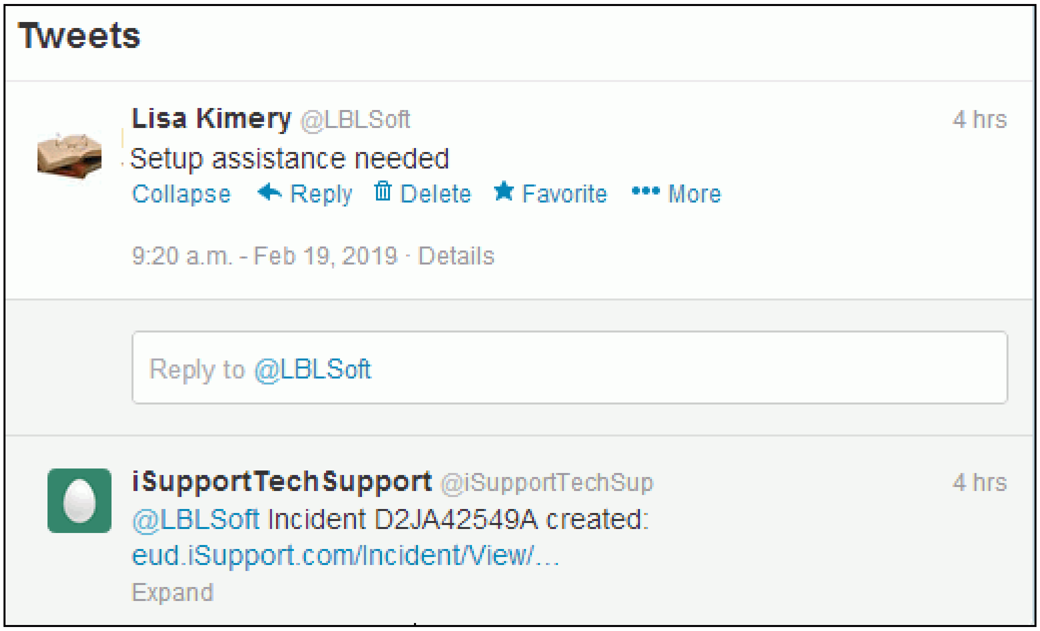
Twitter Monitor

The Twitter Monitor component searches Twitter and displays tweets that include a specified search term, or for a specified Twitter account, for the last 90 days. You can use the Reply link to reply to tweets directly from iSupport or use the Create Incident link to create an incident.



If creating an incident, a reply tweet will be sent with the incident number and a link to the incident. The originating tweet will be included in the Description field in the incident, and if the Twitter username exists for a customer in

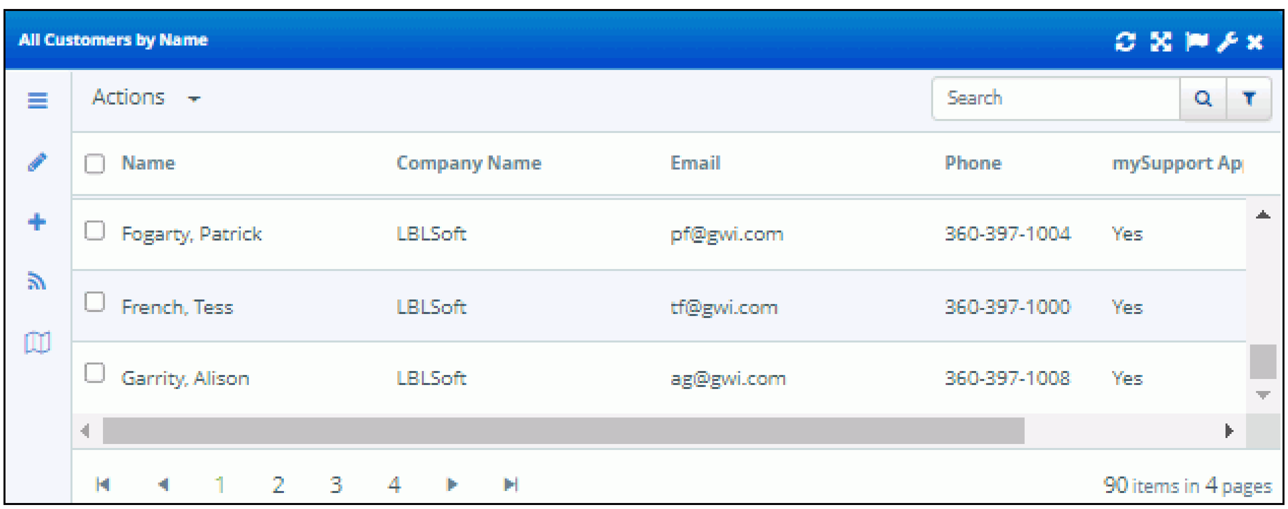
Customer Profiles, the matching Customer Profile record will be used. If the Twitter username does not exist for a customer, a new Customer Profile record will be created in the format of <*Twitter username*>@twitter.com.



This component requires that a Twitter application is configured and made available to the Desktop via the Social Media Integration Configuration screen.

Views

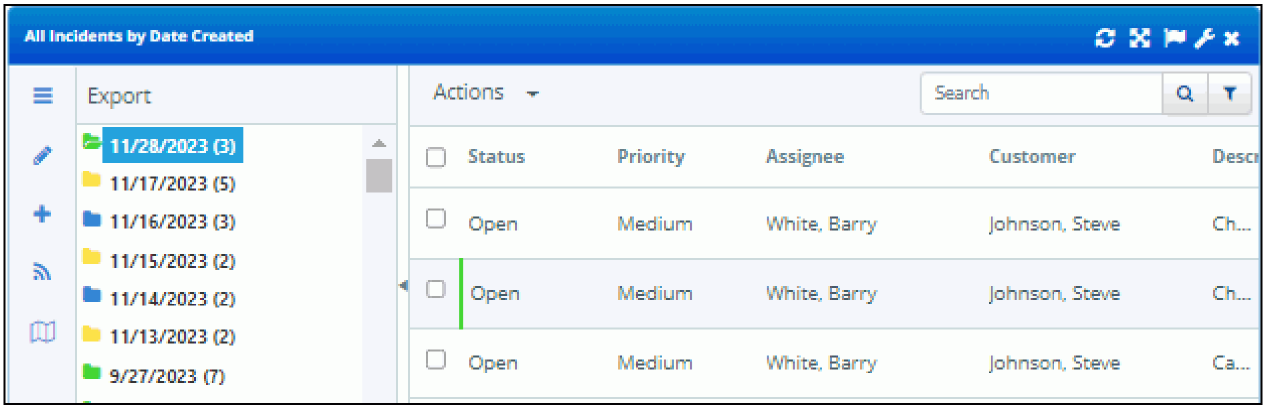
Use the View component to display iSupport data in iSupport's default views and in views created via the View Designer and Report Designer. In the View component you can perform functions such as searching, opening and routing records, and more. You can also display headlines and FAQs.



In a view with the read/unread feature is not enabled, all folders will be blue. If read/unread feature is enabled for a view, the following will display:

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

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



- You can open any item in a view by clicking on it, and you can click on a column heading to sort it in ascending/ descending order. Next and Previous navigation options will appear in the ribbon bar when an item is opened from the View component. The Next option will open the next record in the view, and the Previous option will open the previous record listed in the view. This applies to all iSupport record types within folders.
- Views do not refresh automatically when items are created, changed, or deleted. To refresh a view, select **Refresh**.
- View functions on the left toolbar include:

  Select the view to display; you can enter text in the dropdown selector to display a list of views matching the text you enter. An asterisk next to a title indicates that alerts and/or charts have been created from a view. You can right-click on a view title to add it to the Favorite Views folder. See “Setting Preferences” on page 57 for more information.

  Edit the selected view in the View Designer.

  Create a view in the View Designer.

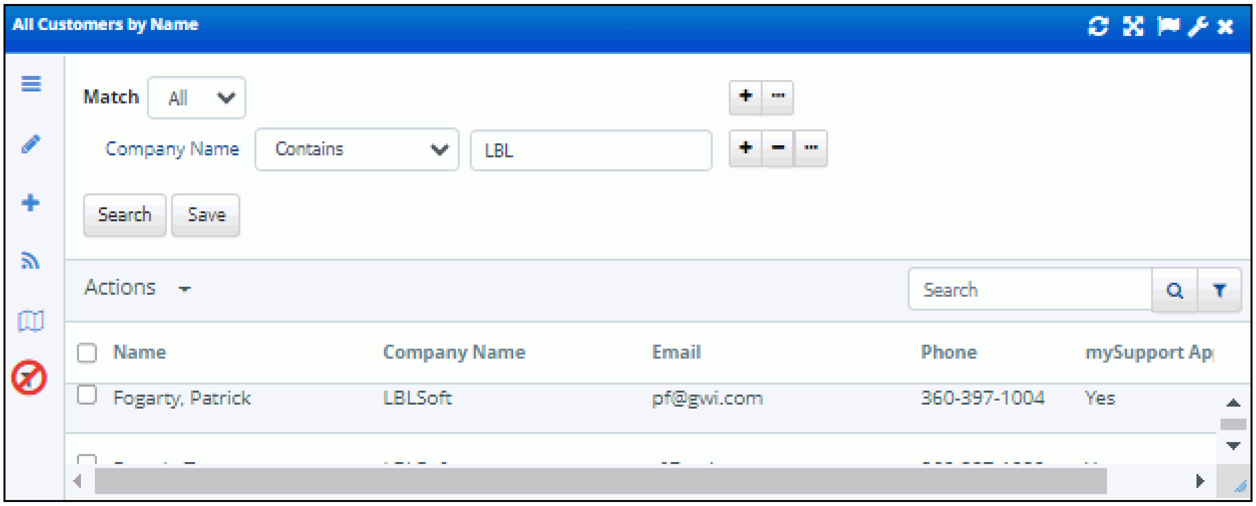
  Send a subscription email with an attached file of exported view data. See “Sending View Subscription Emails” on page 55.

  Display a quick tour of the View component.

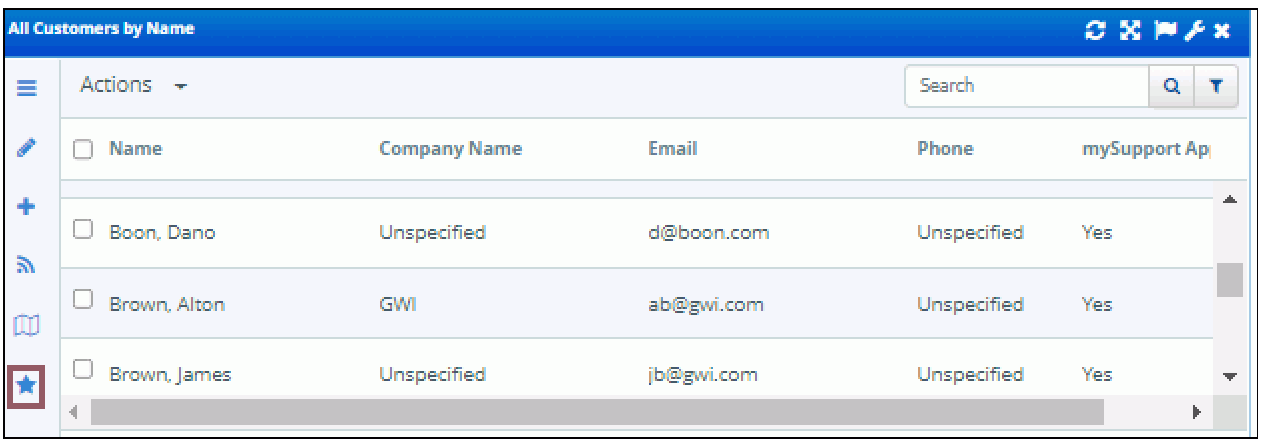
- Use the **Search** field to perform a literal (but not case-sensitive) search for a character string within all data displayed in the current view. To perform a simple search, place the cursor in the Search field, enter the character string, and select Quick Search. You can search for an incident number in an incident view, even if it doesn't exist in a displayed column.

  Select **Advanced** Search to set criteria for filtering data in a chart. Use the Match *<All/Any>* field to specify whether you want **every** *<field> <comparison method> <value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition and Remove Condition options to display and remove a *<field> <comparison method> <value>* search condition. Select Add Condition if you wish to include another condition.

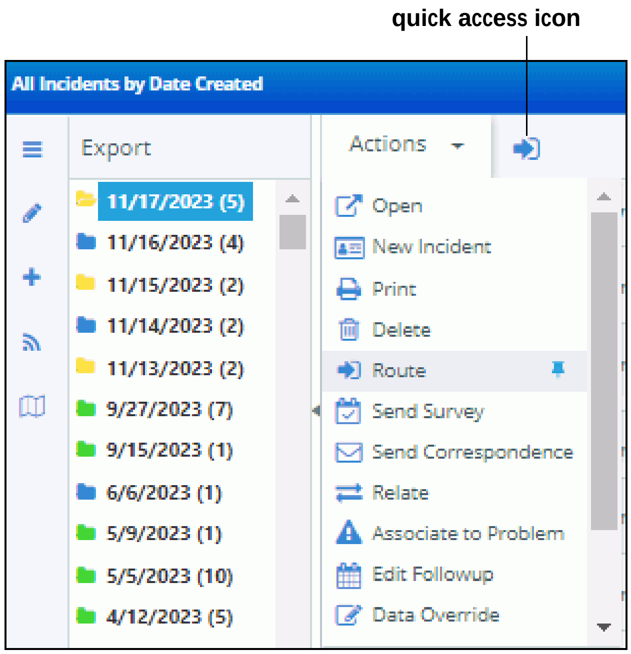
You can select Add Condition Group to put a set of search conditions to be evaluated together in a group. Click the Save button to enter a name for the search and save it.



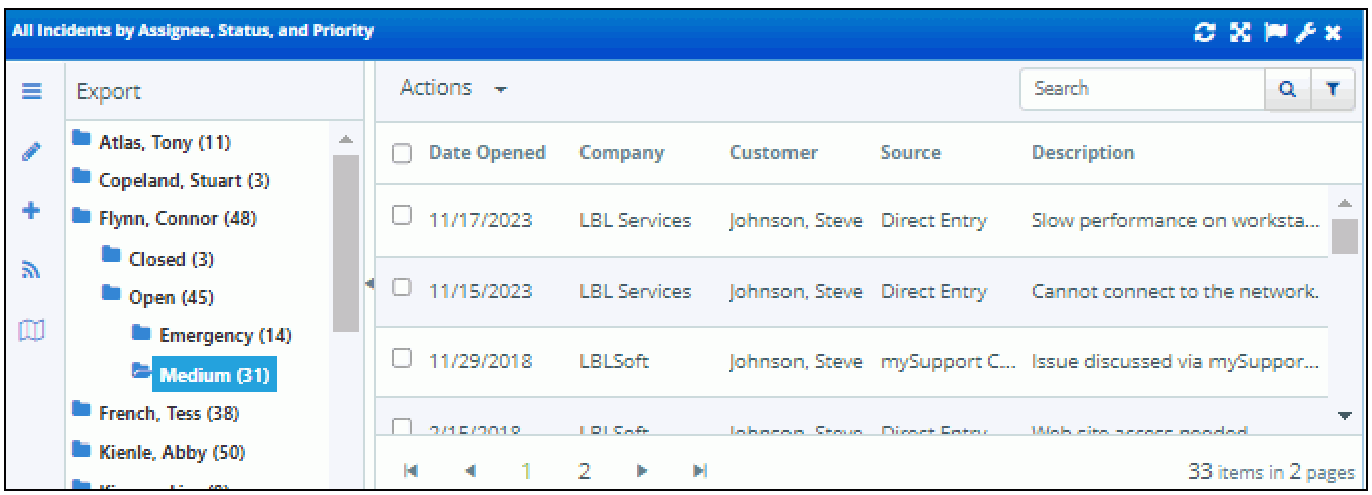
Click the Save button to enter a name for the search and save it. The Saved Searches option will display on the left toolbar; hover over it to display saved searches.



- Use the **Action dropdown menu** to perform actions such as opening and routing records. Use the Add to Quick Access Toolbar option to add icons to the top of a view. You can drag icons to change the order. The view action will remain on the Actions menu with a pin icon for removal from the quick access toolbar.



- You can specify the number of entries per page in the Preferences screen; when the number of entries exceeds the specified number of view entries per page, a set of **view paging links** appear at the bottom of the entries as shown below:

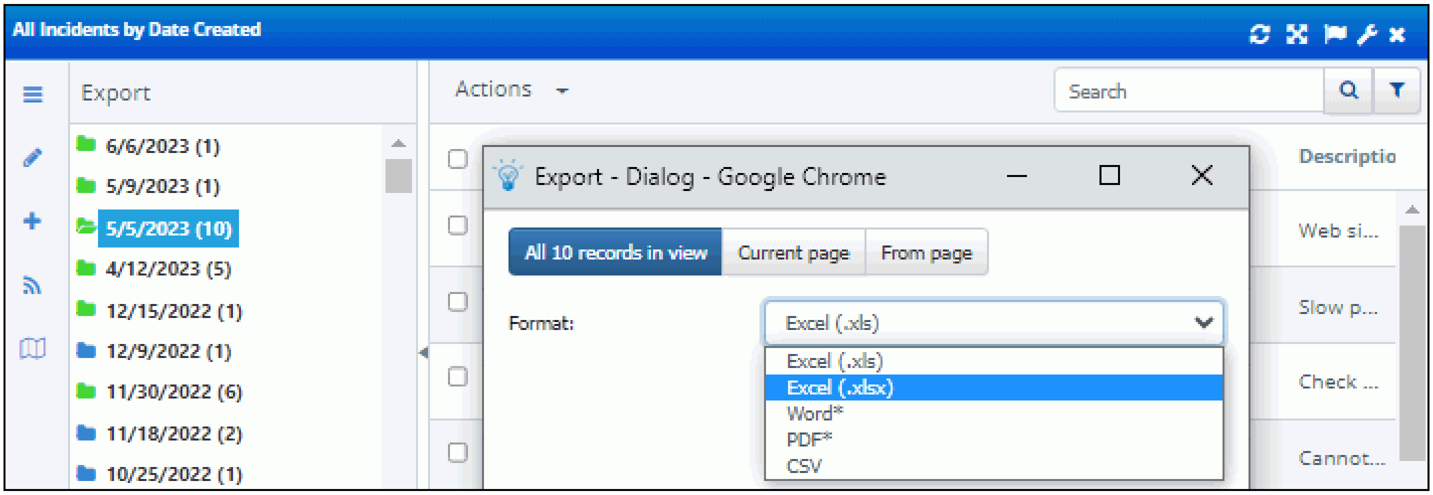


You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt **+** to move forward one page
- Press Alt **-** to move back one page
- Press Alt **>** to jump forward to the last page
- Press Alt **<** to jump back to the first page

Throughout the application, you can use Microsoft® Internet Explorer® keyboard shortcuts such as Ctrl+W to close a window or Ctrl+F to display the Microsoft® Internet Explorer® Find dialog for text searching.

- You can **export view data** in Microsoft® Excel (*.xls and *xlsx) formats, Microsoft® Word (*.doc) format, Portable Document Format (*.pdf), or Comma Separated Value Format (*.csv). Comma Separated Value Format is usable with Microsoft Excel and other third party tools. Use the Export option on the Actions menu to export the data represented in the right frame; you'll be able to export all records at once, the current page, or a range of pages, all based on your current view, search, and sorting criteria.



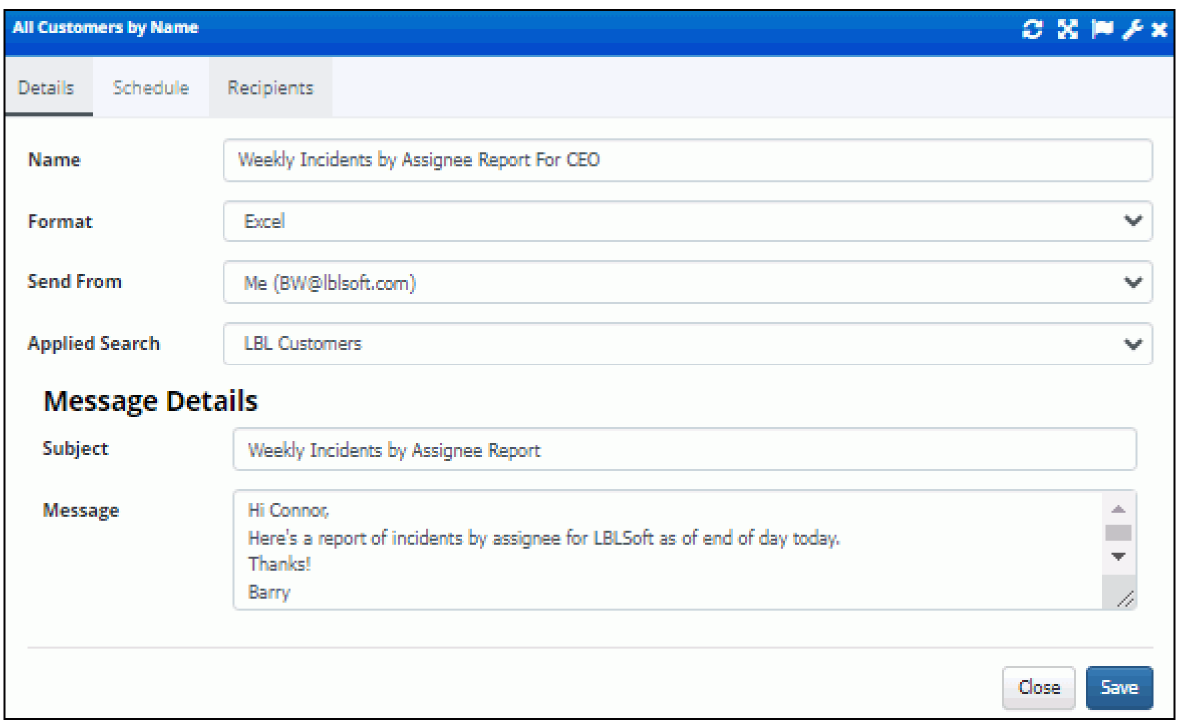
Use the Export link in the left categorized frame to export all records in the view, preserving any search results.

For Microsoft Word and Adobe PDF formats, the horizontal display will be clipped to the display size of the page.

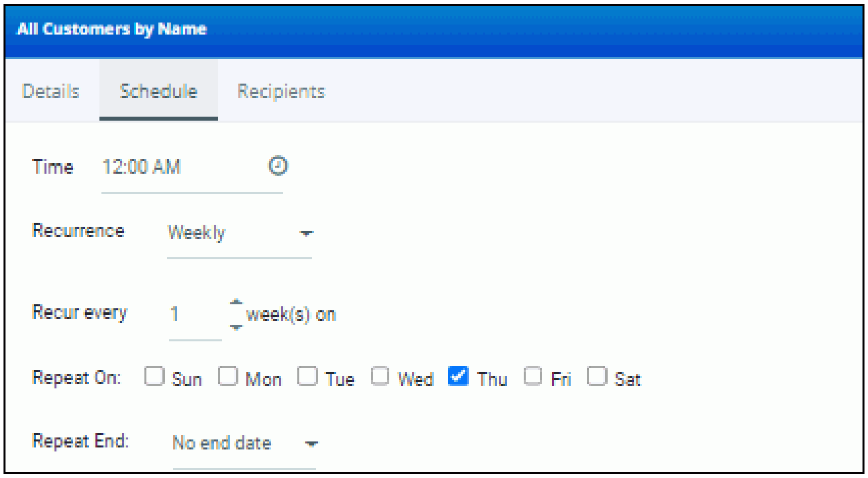
Sending View Subscription Emails

- If the View Subscription agent is enabled and you have permission in your Support Representative Profile record, use the **Subscription** option in the View component to send an email with an attached file of exported view data to configured recipients on a schedule. The email will be sent via the View Subscription agent, which runs on a five minute interval. You can utilize a saved search filter of the view; note that if using a view with an @My filter (including default views in iSupport with "My" in the title) and a support representative is a selected support representative recipient, the @My filters will apply to the exported view sent to the recipient.

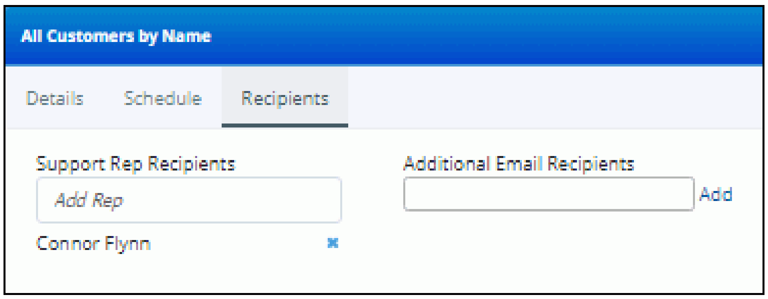
  On the Details tab in the Subscription Settings dialog, specify the name and format of the exported data, the address from which the email should be sent (your address or the configured Email Notification Reply To email address), and the subject and body of the email. To apply a filter to the view before the export, select a saved search in the Applied Search field.



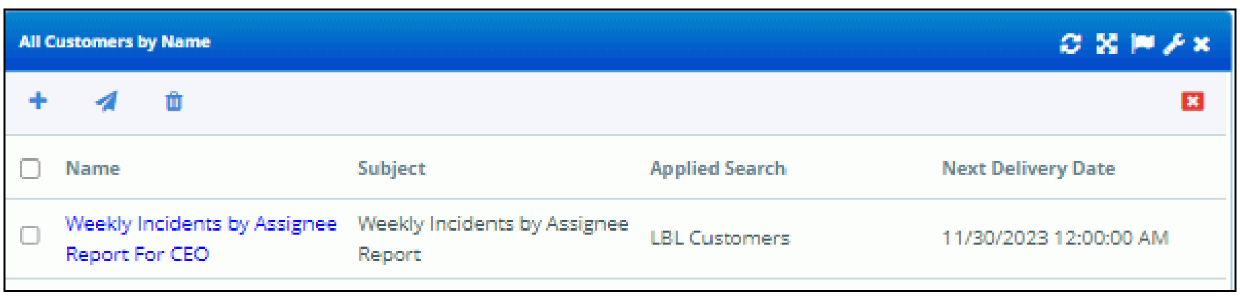
On the Schedule tab, specify the days and times at which the export email should be sent.



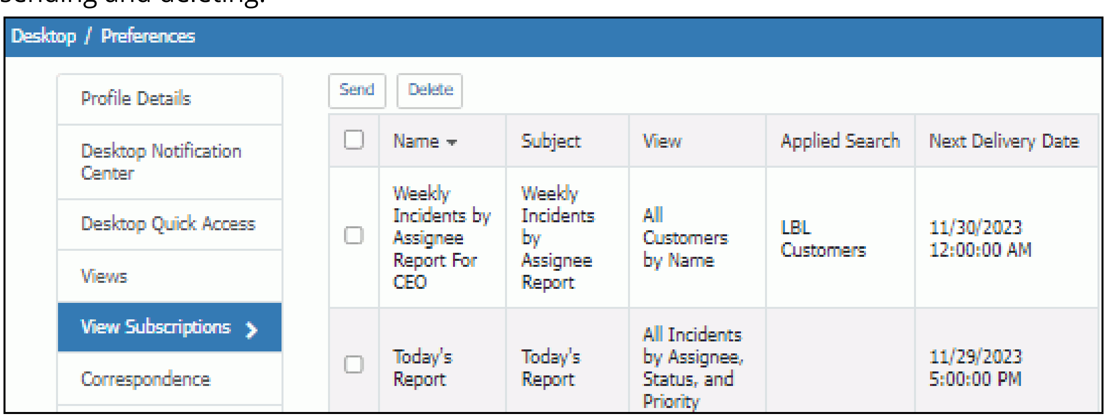
Use the Recipients tab to specify support representative(s) and others to receive the email.



Saved subscriptions appear when you click the Subscription icon; use the links to create, send, or delete.

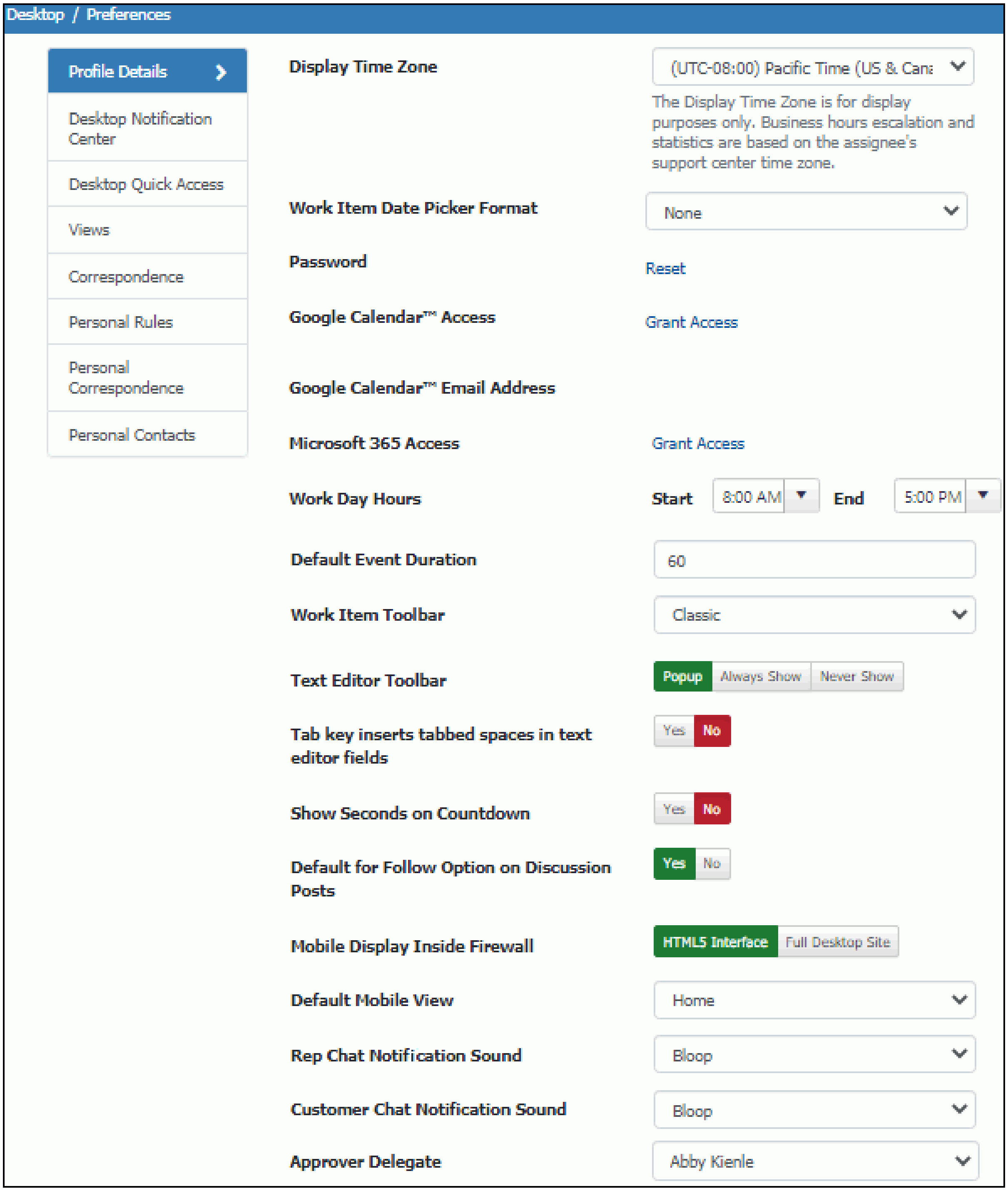


All of your configured view subscriptions are listed on the View Subscriptions tab in the Preferences screen, along with links for sending and deleting.



Setting Preferences

Use the **Preferences** option on the Profile menu to set personal options for using iSupport.



Desktop Notification Center: See page 60.

Desktop Quick Access: See page 61.

Views: See page 62.

View Subscriptions: See page 63.

Signature Block: See page 63.

Personal Rules: See page 64.

Personal Correspondence: See page 66.

Personal Contacts: See page 67.

Setting Your Display Time Zone, Password, and Other Desktop Options

On the Details tab, you can:

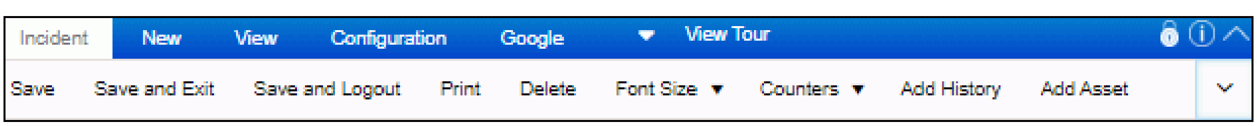
- **Display Time Zone** - Select the display time zone to use for all date/time stamps. This is for display purposes only on your Desktop client.
- **Work Item Date Picker Format** - Select the default date format for work item date type fields: Month/Day/Year or Day/Month/Year. The None option will default to the format of the server.
- **Password** - Use this field to change your password to log into iSupport. The new password will be updated in your Support Representative record.
- **Google Calendar Email Address/Access** - If Google Calendar integration is enabled, use these fields to enable access to your calendar for scheduling meetings via iSupport entry screens.
- **Microsoft Exchange User Name/Password** - If Microsoft Office Outlook Calendar integration is enabled, use these fields to enable access to your calendar for scheduling meetings via iSupport entry screens.
- **Default Event Duration** - Enter the number of minutes to use in the calculate the length of time between the default start time and default end time in the New Appointment dialog for event calendars.
- **Work Day Hours** - If Microsoft Office Outlook Calendar and/or Google Calendar integration is enabled, use this field to set the time frame during which you are available to have meetings scheduled via iSupport. (Dates/times outside of work day hours will be designated as "Unavailable" in the calendars displayed via iSupport.) Note that work day hours can also be set in the Configuration module.
- The **Microsoft 365 Access** field will appear if Microsoft 365 integration is enabled; use these fields to log into your Microsoft account and enable access to the Teams meeting function in the Incident, Problem, Change, and Customer screens. If consent was given on behalf of the organization when Microsoft 365 Integration is configured, you will not need Microsoft administrator level access.
- **Work Item Toolbar -** Select how to display the icons and text in the toolbar on work item screens. Examples are shown below; when you resize the window, you can use the down arrow to display the rest of the options.

Image Top

Image Left

Image Only

Text Only

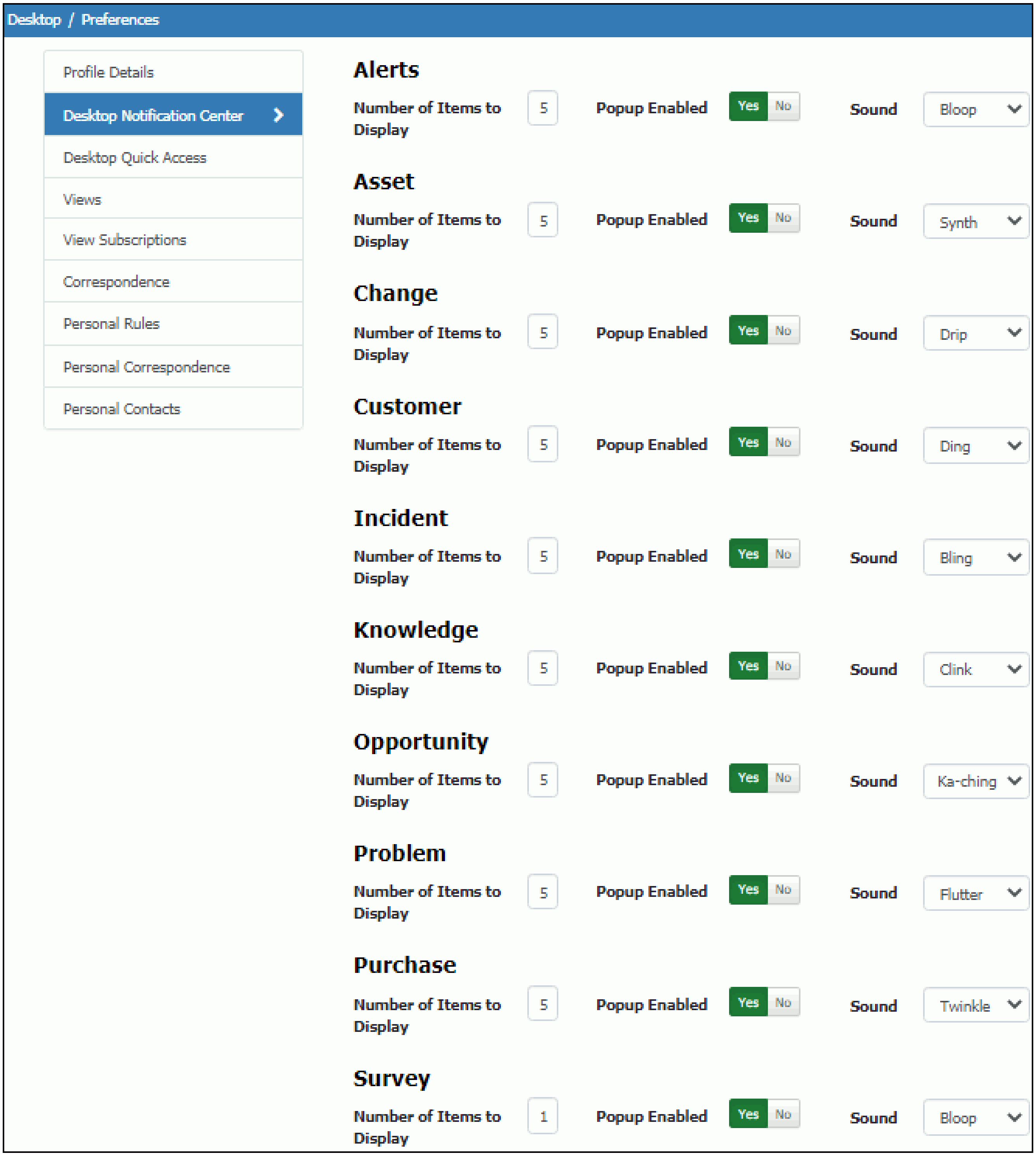


- **Text Editor Toolbar -** This field controls whether to display the text editor toolbar when you place your cursor in a toolbar-enabled field (Popup), retain display of the toolbar over those fields (Always Show), or prevent display of the toolbar in those fields (Never Show). Note that if you select Never Show, you can still display the toolbar by clicking the field label link that displays a larger window.

- **Tab Key Inserts Tabbed Spaces in Text Editor Fields** - Select Yes to enable the Tab key to insert spaces (instead of moving between fields) in fields with a text editor toolbar (such as the Description and Resolution fields).
- **Show Seconds on Countdown** - Select Yes to control display of the Seconds portion of the countdown clock that appears when you select Countdown when time-based rules are active in a work item.
- **Default for Follow Option on Discussion Posts** - Select Yes in the to default the Follow option in the Create Discussion Post and Reply dialogs to Yes. The Follow option enables an email notification to be sent to you when someone replies to one of your posts. See "Configuring News Feed Basics" on page 38 for more information.
- **Mobile Display Inside Firewall** - Select HTML Interface to display iSupport's mobile interface when the iSupport Desktop URL is accessed via a mobile device; select Full Desktop Site to display the full iSupport Desktop (instead of iSupport's mobile interface) when accessing the Desktop via a mobile device. (The Allow Mobile Access Inside Firewall setting must also be enabled in your Support Representative Profile record.)
- **Default Mobile View** - Select what to display by default when accessing iSupport via the HTML interface on a mobile device: the Home screen, Views screen, Search screen, or Recent Items screen.
- In the **Rep Chat Notification Sound** field, select the sound to play when a chat is received on the Desktop.
- In the **Customer Chat Notification Sound** field, select the sound to play when a chat is received on the mySupport portal.
- In the **Approver Delegate** field, select a support representative who can specify a verdict on work items pending approval for you. Note that you can also specify an approver delegate in your Support Representative Profile record.

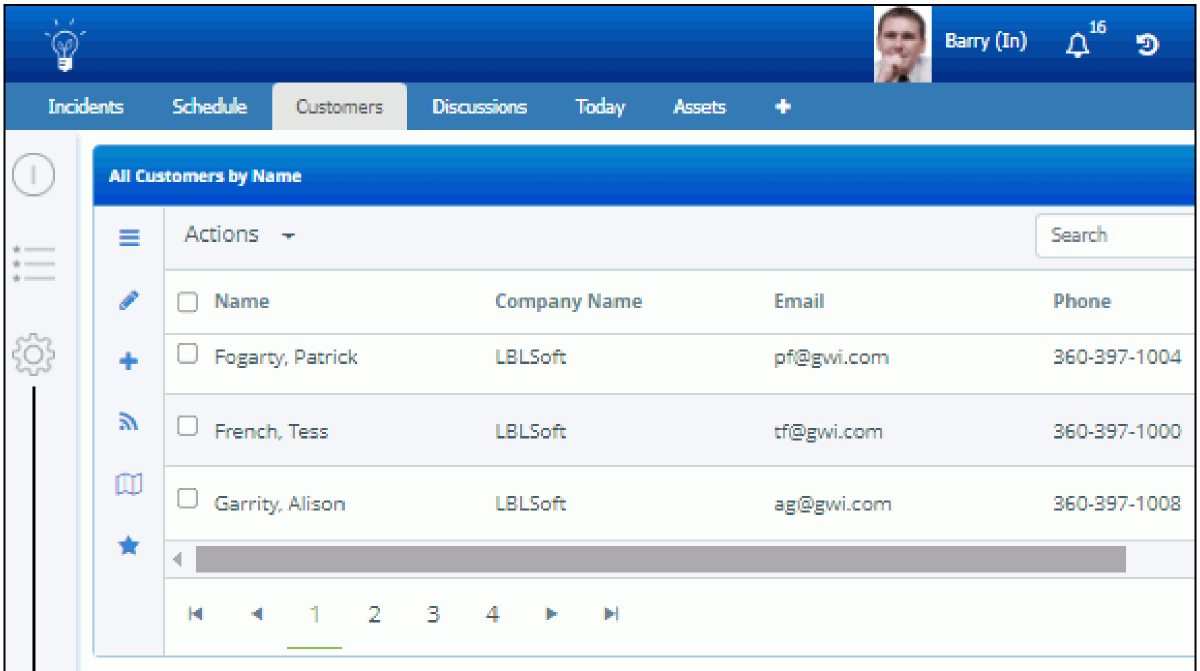
Configuring Desktop Notification Center Preferences

The Desktop Notification Center tab in the Preferences screen enables you to specify the delivery method for Desktop notifications: in the Notification Center list at the top of the screen, in a popup, and playing a sound. Options will appear for alerts and all work item types with rule functionality. Use the Number of Items to field to specify the maximum number of entries that should appear in the list at one time; use the Sound field to select the sound to play when the number increments for the corresponding feature in the Notification Center list.



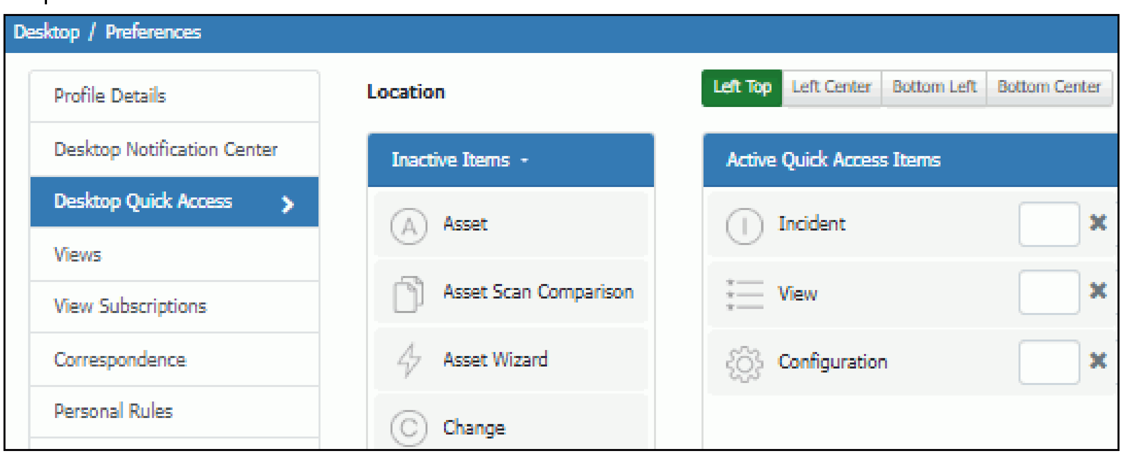
Configuring the Desktop Quick Access Section

Use the Desktop Quick Access tab to add a toolbar with icons for accessing screens in a collapsible bar on the left side of the Desktop.



Customizable Quick Access Section

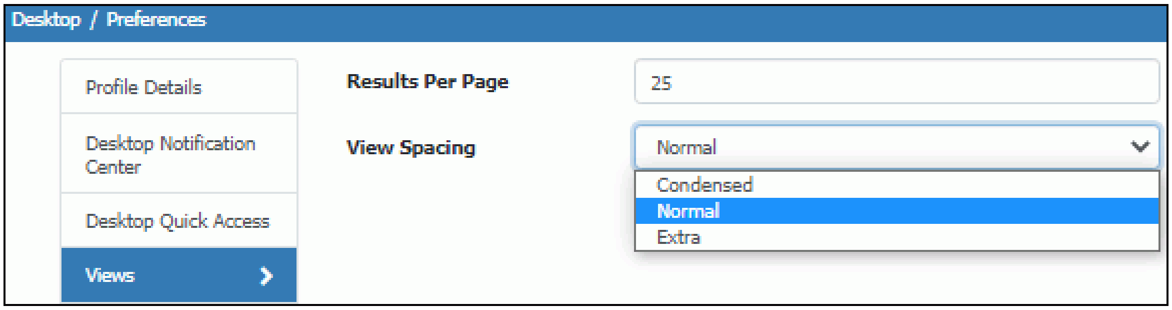
To add an icon to the quick access section, drag the applicable item from the Inactive Quick Access Items column to the Active Quick Access Items column on the right. You can hover over the Inactive Quick Access Items column heading to display a list of incident/change templates or hierarchy templates and add an icon for creating a work item from a template.



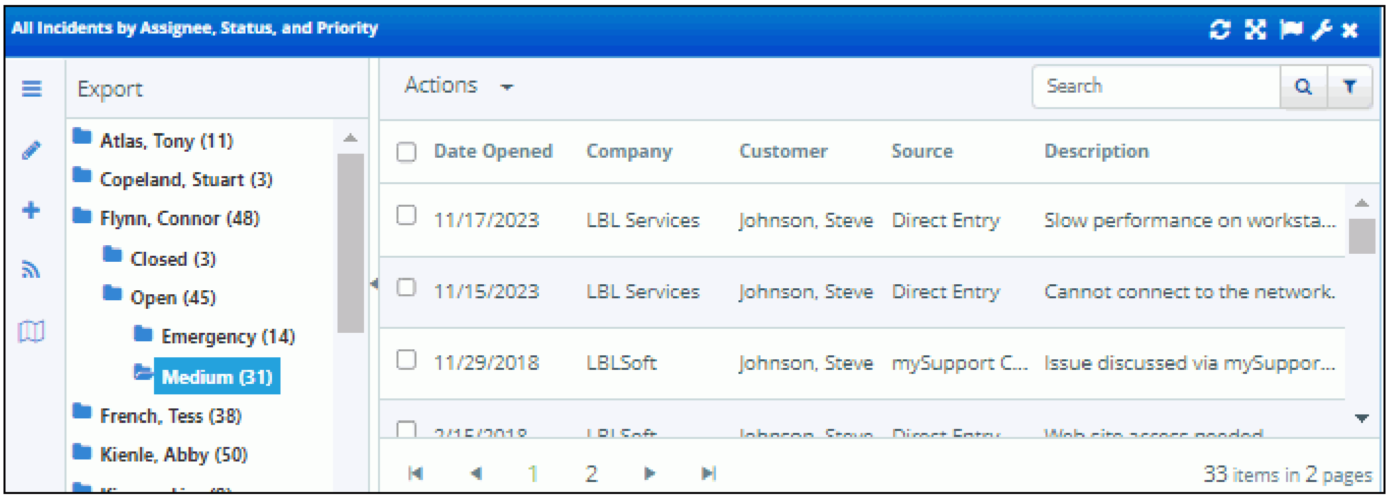
To create a shortcut key, assign an alphanumeric key (0-9 a-z) in the blank field on the item. This key will be used with the Alt key for Internet Explorer, Google Chrome, and Apple Safari, and used with the Alt Shift keys for Mozilla Firefox.

Specifying View Options

Use the Views tab in the Preferences screen to specify the number of view entries on a page.



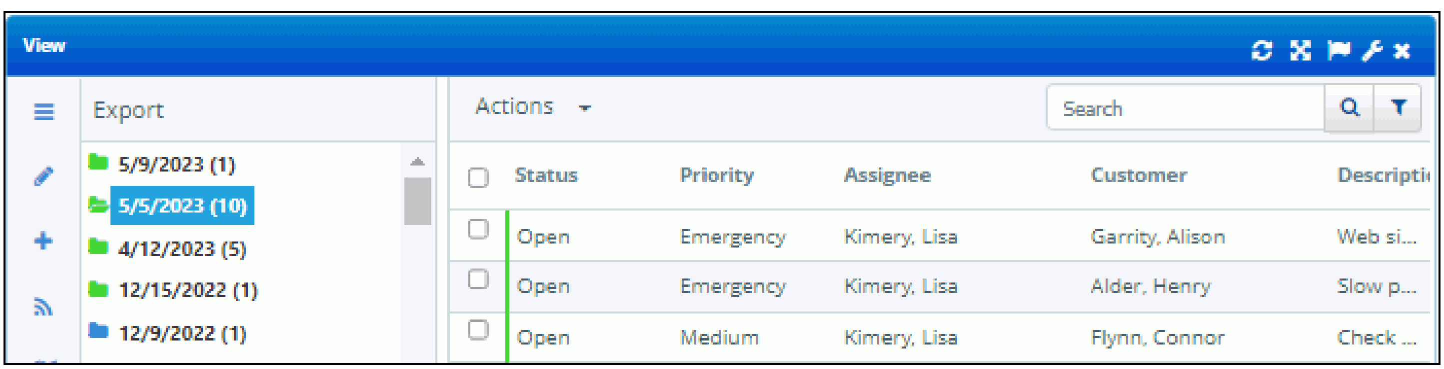
Results Per Page - Specify the number of entries (results) to display at a time. When the number of entries exceeds the specified number of view entries per page in the View component, a set of view paging links appear at the bottom of the entries as shown below:



You can use the following keyboard shortcuts for paged views: Alt **+** to move forward one page, Alt **-** to move back one page, Alt **>** to jump forward to the last page, or Alt **<** to jump back to the first page.

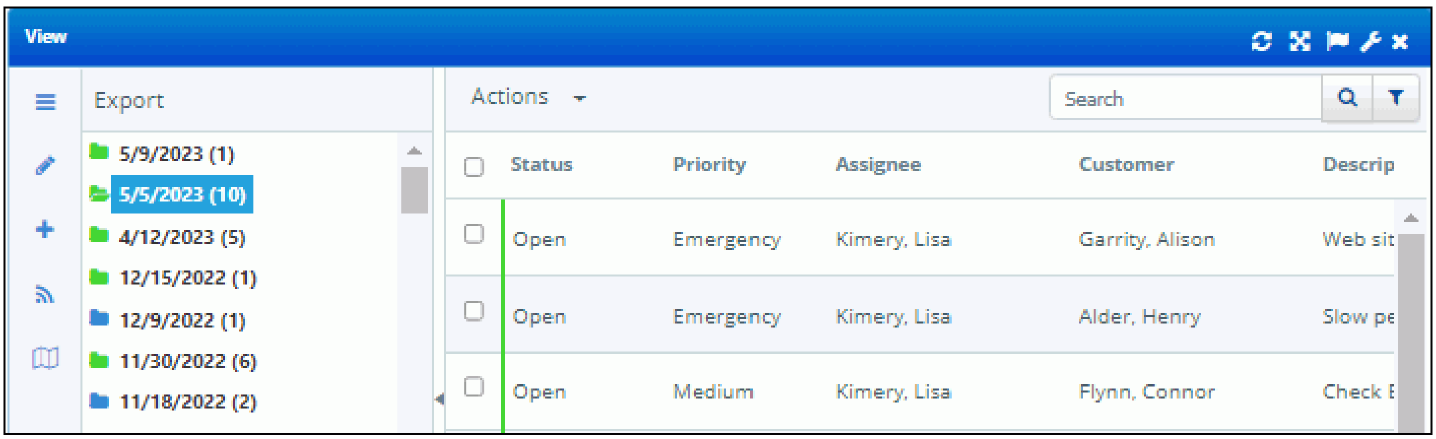
View Spacing - Select the line spacing for displaying view entries:

Condensed



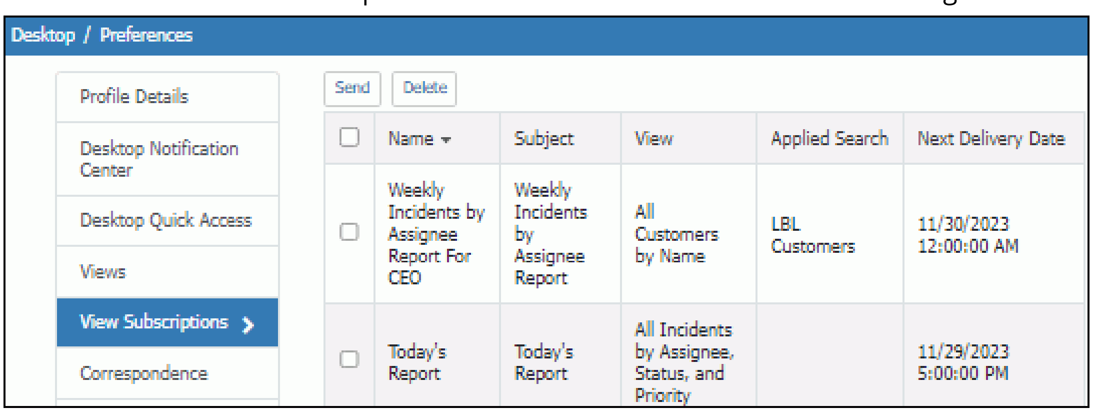
Normal

Extra



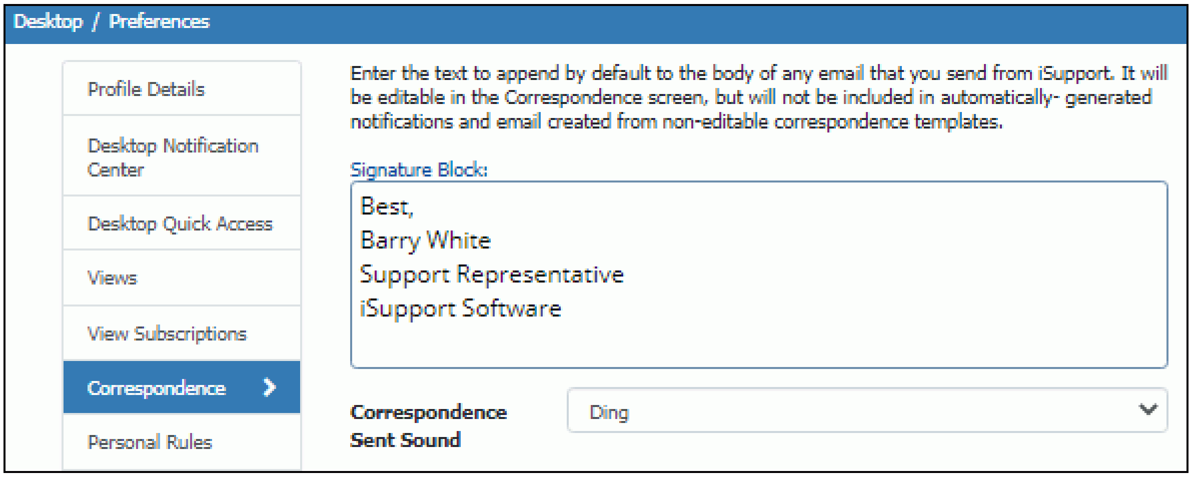
Sending and Deleting View Subscriptions

You can select **Subscription** in the View component to send an email with an attached file of exported view data to configured recipients on a schedule; the email will be sent via the View Subscription agent, which runs on a five minute interval. See "Sending View Subscription Emails" on page 55 for more information. All of your configured view subscriptions are listed on the View Subscriptions tab in the Preferences screen for sending and deleting.



Entering Your Signature Block/Selecting a Correspondence Sent Sound

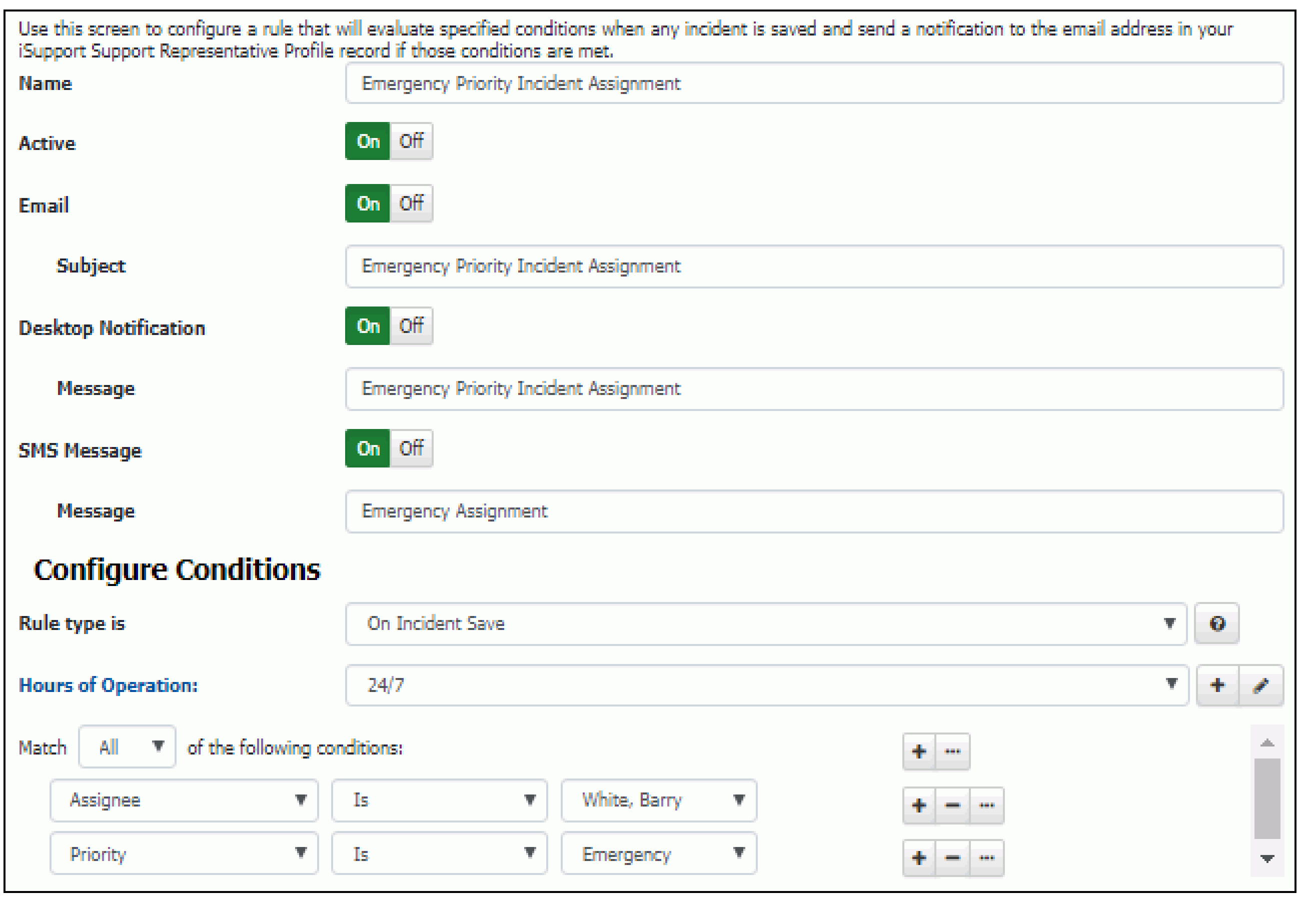
Signature Block - Enter text to append to all editable email that you send from iSupport. You can click the Signature Block link to display a larger window with a text editor toolbar for formatting text. You do not need to enter blank lines before the text; two blank lines will be inserted before the signature block when a blank correspondence is initiated. If an editable correspondence template is selected in an entry screen, one blank line is inserted automatically before the signature block. You can edit the signature block text in the Correspondence screen if needed.



Correspondence Sent Sound - Use the Correspondence Sent Sound field to select a sound to play after you send a correspondence.

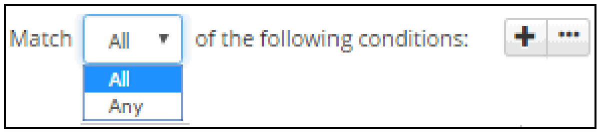
Creating Personal Rules

If permissions for personal rules are enabled in the Rep Profile screen, use the Personal Rules tab to configure a rule that will evaluate specified conditions when any record of a certain module type (Incident, Problem, Change, or Customer Profile record) is saved and send a notification to the email address in your Support Representative Profile record if those conditions are met. You can also display an entry in the Notification list on the Desktop. Note that creation of personal rules is logged in Configuration Audit History.

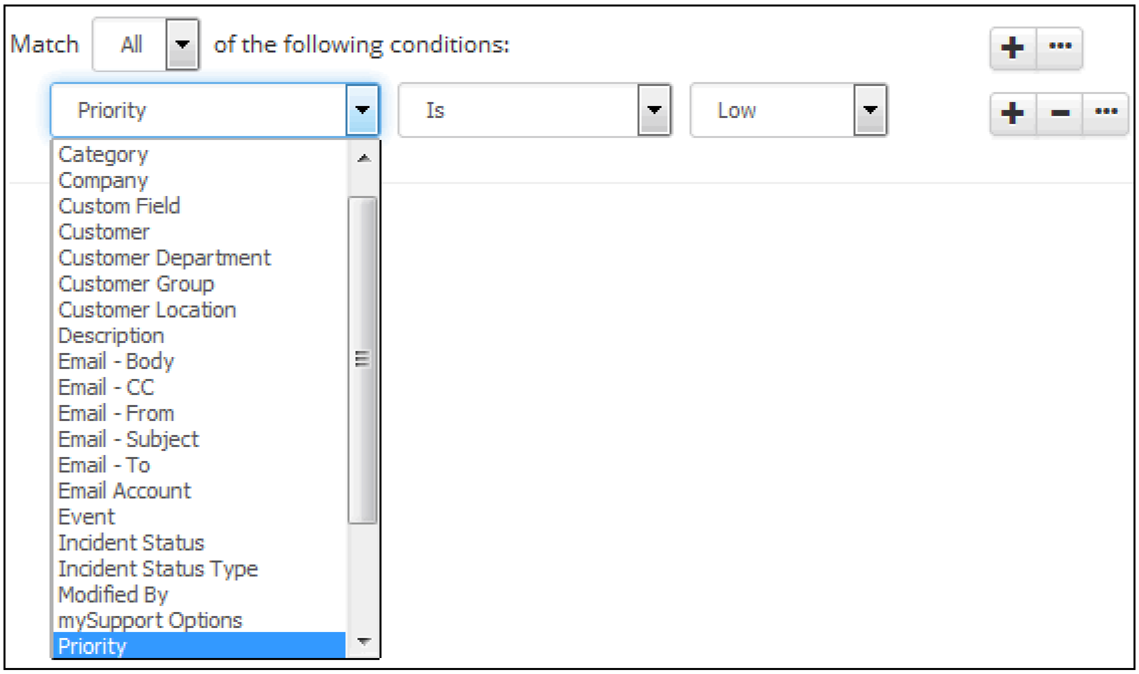


Note that the Hours of Operation field only applies when Within Business Hours is included in a condition.

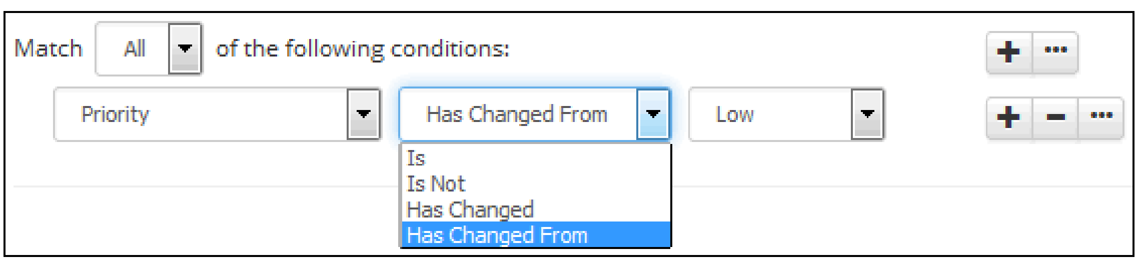
To configure the conditions on which the notification is sent, use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



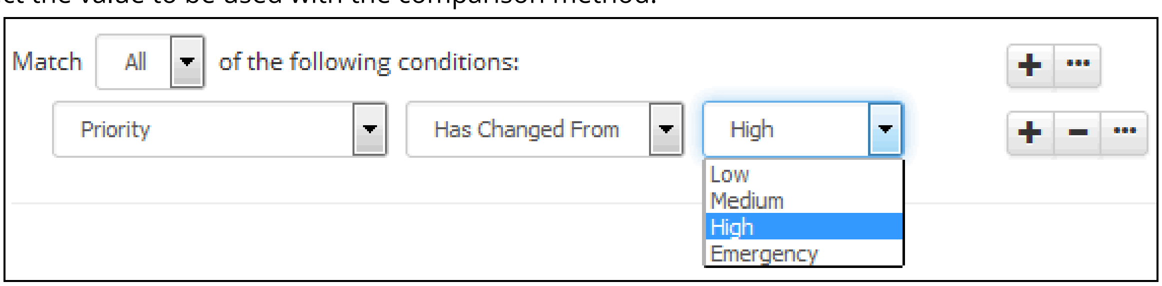
Use the Add Condition and Remove Condition options to display and remove a set of condition dropdown fields (a list of fields, a list of comparison methods, and a list of values applicable to the selected field) to evaluate upon incident save. In the Select a Target dropdown, select what to evaluate: a field or event, whether it is within business hours, etc.



In the next dropdown, select the comparison method.



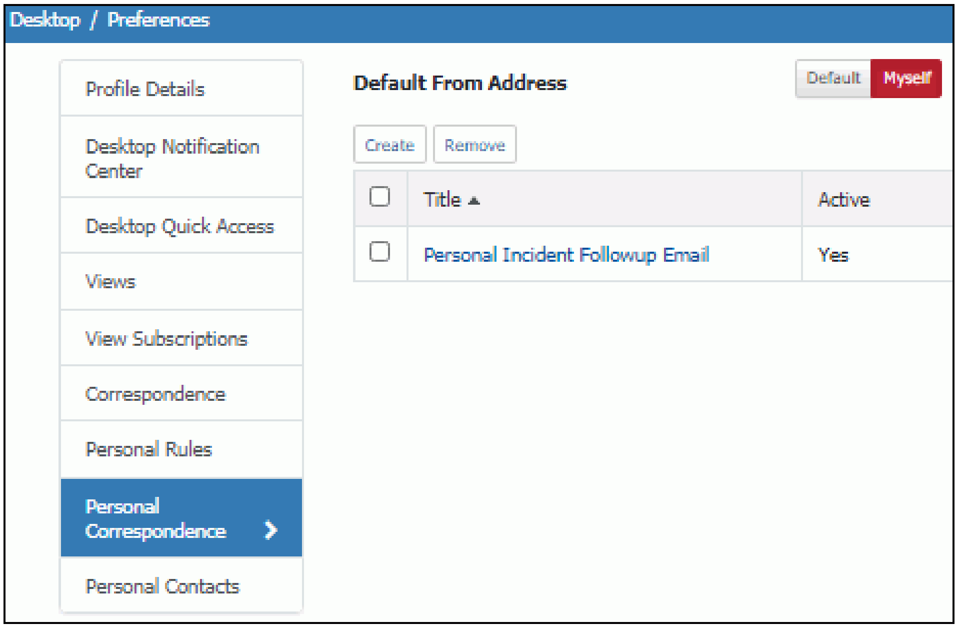
Finally, select the value to be used with the comparison method.



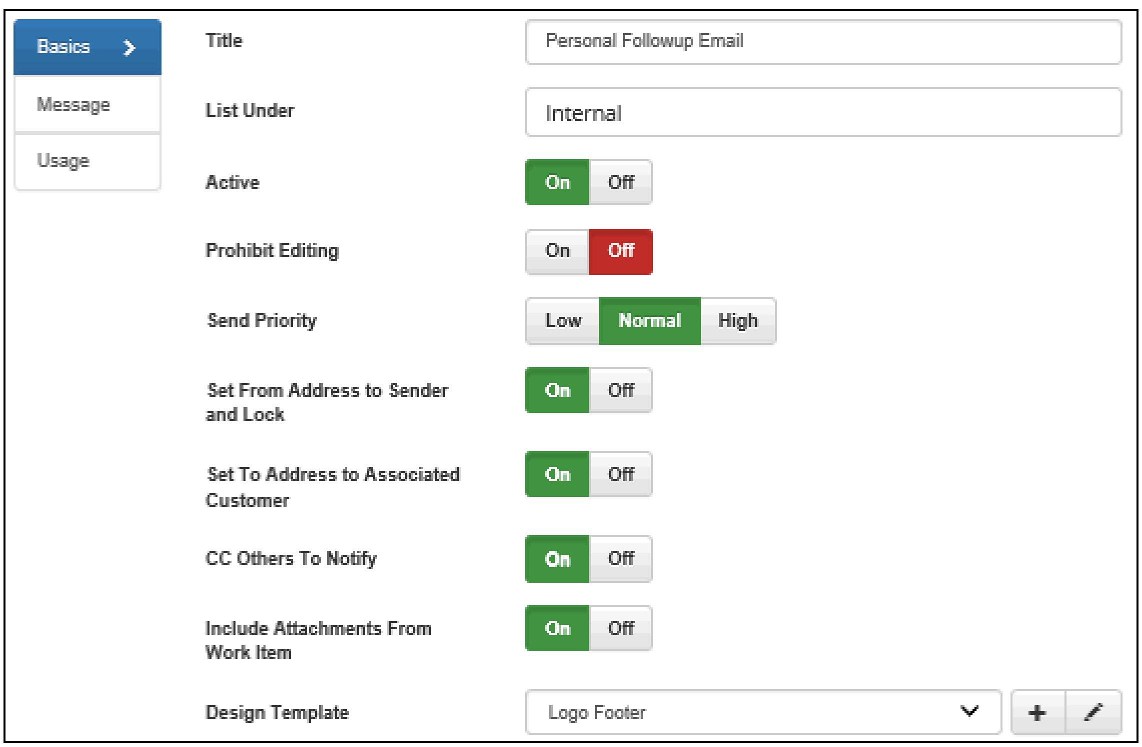
Select Add Condition if you wish to include another condition. You can select Add Condition Group to put a set of conditions to be evaluated together in a group.

Creating Personal Correspondence Templates

In the Default From Address field, select one of the following for populating the From field in the Correspondence screen: Default to use the address in the Email Notification Reply To field in the Default Outbound Email Settings screen, or Myself to use the email address in your support representative profile.

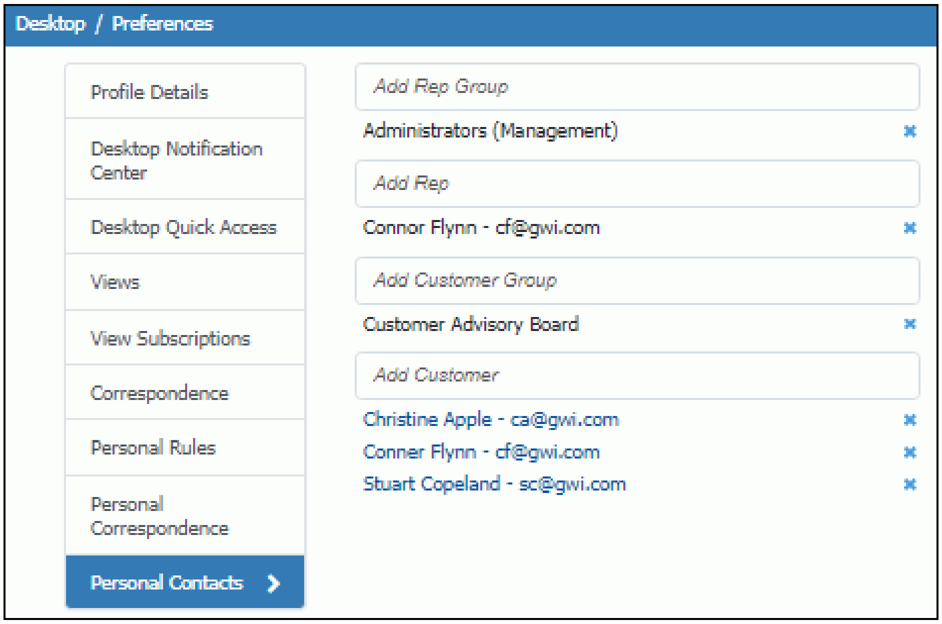


If permissions for personal correspondence templates are enabled in your Support Representative Profile record, use the Correspondence tab to create a correspondence template that will appear only to you in the list of correspondence templates available in iSupport. Note that personal correspondence templates will be available for editing and deletion in the Configuration Audit History screen. Use the Correspondence Template screen to set up a correspondence template to populate fields when sending correspondence via iSupport entry screens or the iSupport Desktop. You can include all aspects of an email, including attachments.



Creating a Personal Contacts List

Use the Personal Contacts tab to specify what to display when type ahead is used in the address fields in the Correspondence and Correspondence Template screens. You can also add to this list via the Add to Personal Contacts customer Desktop view action and the Add to Contacts option in the Customer Profile screen.



Configuring iSupport Desktop Settings

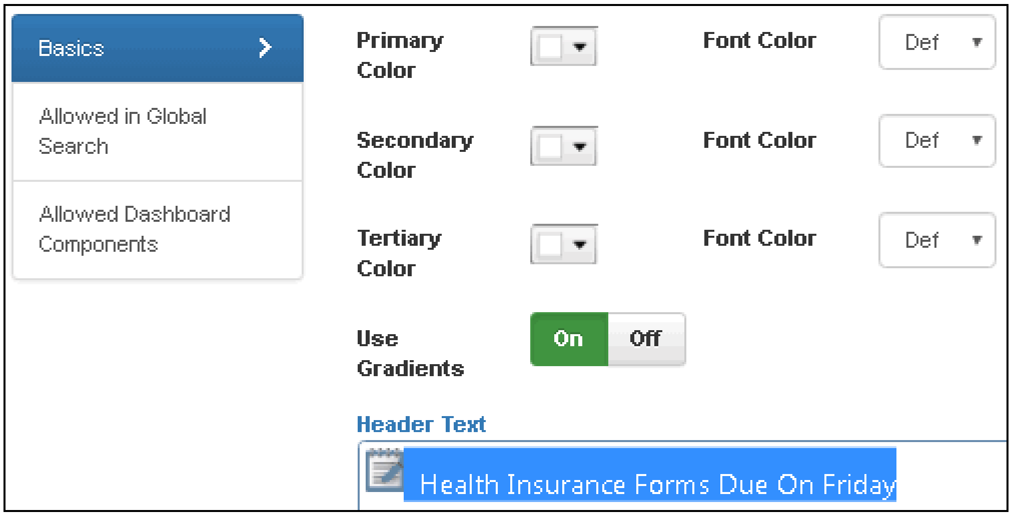
Use the Options and Tools | Customize | Dashboard Settings screen to designate:

- The colors of dashboard elements
- Header text with links, images and formatting
- The components that all support representatives can add to iSupport Desktop dashboards
- The record types/features involved in global searches performed by all support representatives.

Note that you can use the Support Representative Group screen to override these settings and enable available components and global search record types/features for members of designated groups.

Configuring Colors and Header Text

Use the Basics tab to configure the colors of dashboard elements; select colors via the color picker or enter an HTML color code. Use the No Color icon to remove a selected color and reset back to default.



Primary - Set the color of the dashboard buttons, lower edge of the Desktop, Chat tab, and component title bar.

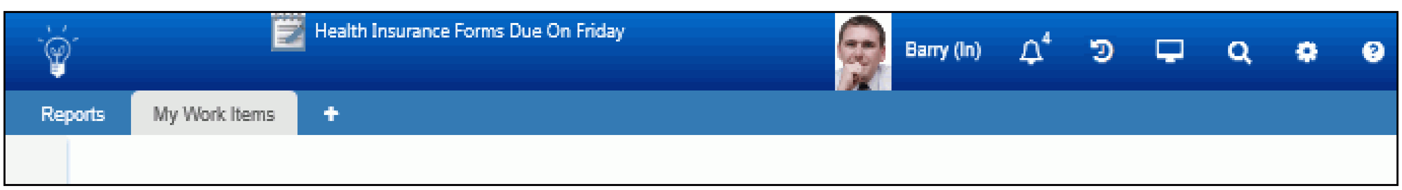
Secondary - Set the color of the active tab and the Expand All option in configuration.

Tertiary - Set the color of the Search and Add Dashboard or Component options.

Font Color - Set the font color to black or white, or you can select Default to enable the system to, based on the selected color, automatically assign black or white depending on which gives the better contrast. (For example, black will be assigned if yellow is the selected color.) This can be overridden by selecting White or Black.

Use Gradients - Select On to display color gradually from light-to-dark; select Off to display color in a flat, saturated manner.

Header Text - Enter text and images to appear at the top of the Desktop page between the Desktop Create icon and the Profile avatar/name. You can format the text and include images via the text editor toolbar. (Note that the text is white, centered, and selected in this example.)

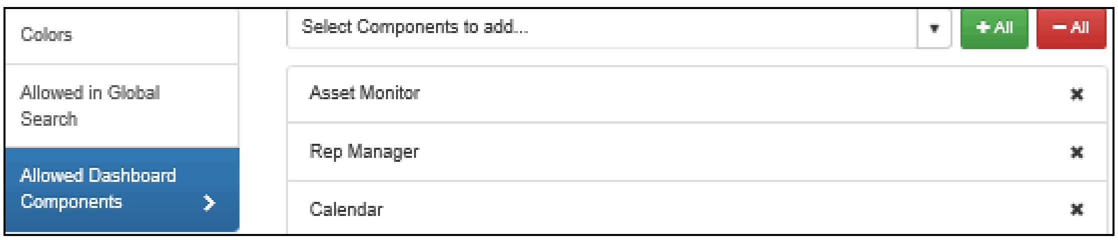


Specifying Items for Global Search

A global search can be performed via the Global Search component on the Desktop as well as the View | Search feature in the Incident screen. To include a record type or feature in global searches performed by all support representatives, drag the record type/feature from the Don't Include column to the Include column on the Allowed in Global Search tab.

Specifying Allowed Components

To make a component available for support representatives to add to their Desktop dashboards, drag the component name from the Don't Include column to the Include column. See "Working With Dashboards" on page 13 for information on each component.



Note that some components will not appear until functionality is configured:

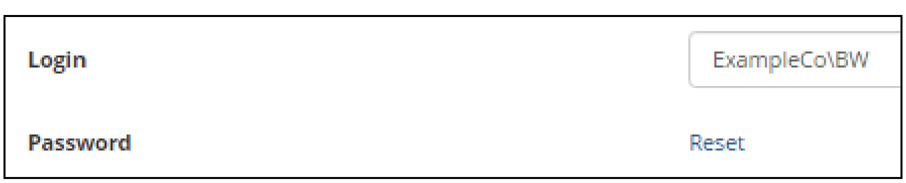
- The Calendar component will not appear in this list until Calendar Integration is enabled in the Options and Tools | Integrate | Calendar Integration configuration screen.
- The Mass Mailing Manager will not appear in this list until enabled on the Mass Mailing Approvals tab in the Core Settings | Email screen.
- The Twitter Monitor component will not appear in this list until a Twitter application is configured and enabled for the Desktop in the Options and Tools | Integrate | Social Media Integration configuration screen.
- The Rep Manager component will not appear to a support representative that does not have Rep Manager access enabled in his/her profile.

Setting Up Microsoft Windows-Based Authentication for the Desktop

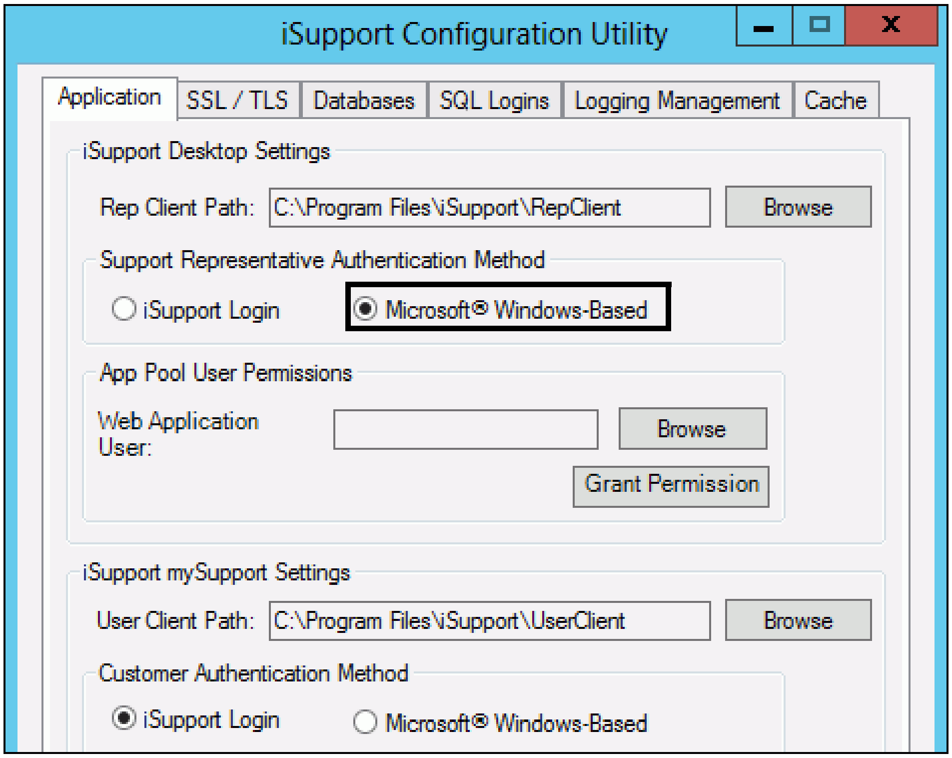
You can set up Microsoft® Windows-based authentication with iSupport, enabling support representatives to bypass the Login prompt for accessing the Desktop. It will apply to all support representatives.

Use the following steps to enable Microsoft® Windows-based authentication for the Desktop. Because this procedure affects support representative logins, it's a good idea to do it after work hours.

1 For each support representative, enter the complete Microsoft Windows user name (*domainname\username*) in the Login field on the Details tab in the Support Representative Profile screen.



2 Open the iSupport Configuration Utility in the <*directory in which iSupport is installed*>\Utilities folder. Verify that the Desktop File Path field contains the correct path to the RepClient folder, or change it if necessary. (If the Desktop File Path field does not contain an entry, use the Browse button to select the location of the RepClient folder.) Select the Microsoft® Windows-Based radio button in the Desktop Settings section. Then click OK.



Setting Up Single Sign On Authentication for the Desktop

You can now use the Single Sign On Integrations screen to enable a third party application (such as Shibboleth and Otka) to pass user credentials so that a user can sign in to mySupport or the iSupport Desktop 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 Desktop (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.

The iSupport login dialog will include a button labeled with the contents of the Login Button Text field in the Single Sign On Integrations screen; further dialogs will appear as required by the identity provider.