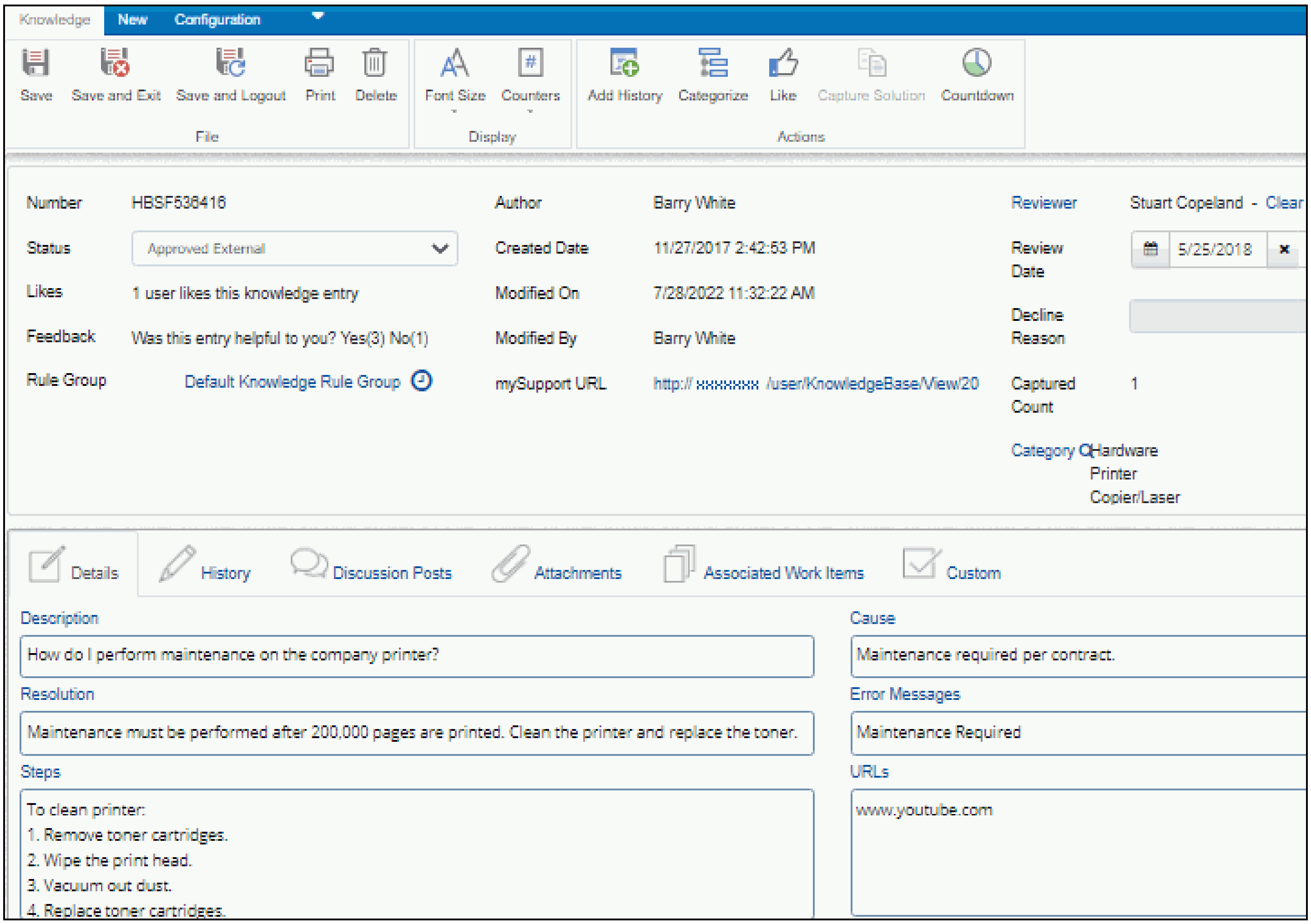
Using the iSupport® Knowledge Entry Screen

Access the Knowledge Entry screen via the iSupport Desktop menu. Knowledge entries can be created automatically via the Incident or Problem (if enabled) screen; when an incident or problem is closed, a prompt displays regarding whether the entry should be added to the knowledge base. When the user selects Yes, the categorization, description, and resolution will be used to create a knowledge entry. If approvals are enabled, the entry is assigned a Pending Approval status. If approvals are not enabled, the entry is assigned an Approved External status.

Note: The fields and layout in the Knowledge screen are set up in the Configuration module. Fields or functionality may not display if disabled or disallowed due to permissions set during configuration. The following sections contain information on **all** Knowledge fields.



Administrators can configure knowledge rules that can automatically change field values and send notifications. Rules are included in a rule groups; rule groups are applied to knowledge entries through category combinations. (A default rule group will apply if none are applicable.) When a knowledge entry is saved, the matching rule group is first determined. Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed.

Entering Basic Information

Entry Number - A system-generated number assigned to the entry.

Source - Enter information on where the knowledge entry originated. By default:

- "Direct Entry" appears if the entry was created via the Desktop.
- "Incident Ticket" appears if the entry was created after an incident was closed and the support representative answered Yes to the "Create knowledge entry?" prompt.
- "Known Error" if the entry was created after a Problem record (if enabled) was closed and the support representative answered Yes to the "Create knowledge entry?" prompt.

Categorization - If categories are enabled, select Knowledge | Categorize or click the Category link assign a category set that describes the issue. In the Incident, Problem, and Change (if enabled) screens, categories are used in knowledge entry searches. On the mySupport portal, knowledge entries (that are approved for external use) can be displayed by categorization. Categories are enabled in sets of up to five levels; the first level is fairly general and the last level is fairly specific.

A dropdown appears containing predefined categories; expand the entries and select the one that best describes the issue.

Author - The name of the person creating the knowledge entry.

Created - The date and time when the knowledge entry was created.

mySupport URL - The URL in this field can be copied and given to customers for accessing the knowledge entry on the default mySupport portal. Note that this field will be blank if the knowledge entry has a status of In Progress or Approved Internal.

Status - Select the status to assign to the knowledge entry; note that custom status labels may exist for these status levels.

- **In Progress** to continue drafting the entry.
- **Approved External** to make the knowledge entry available for viewing on the Desktop, mySupport portal, and Incident, Problem, and Change (if enabled) screens.
- **Approved External - Requires Authentication** to include the knowledge entry on the mySupport portal only for authenticated users.
- **Approved Internal** to make the knowledge entry to be available for viewing on the Desktop and Incident, Problem, and Change screens.

If approvals are enabled:

- If you **are** designated as a knowledge approver, you can select one of the following:
  - **Pending Approval** to include the entry in the Pending Approval folder in the Knowledge view on the Desktop.
  - **Declined** to decline the entry. A prompt will display for the reason why the entry was declined, and the reason will display on the entry. The entry will be included in the Declined folder in Knowledge views on the Desktop so that the submitter can view, edit, and resubmit it if necessary.
- If you **are not** designated as a knowledge approver in your Support Representative record, "In Progress" appears as default. Select Pending Approval when you are ready to make the entry available in the Pending Approval folder in Knowledge views on the iSupport Desktop.

After a knowledge entry is approved, only those designated as an approver can update it. If approvals are disabled, you can select Approved External or Approved Internal, or In Progress in the Status field.

Reviewer - If approvals are enabled, select the support representative to be sent a knowledge entry review notification on the date specified in the Review Date field. Note: this field can be edited only by knowledge approvers.

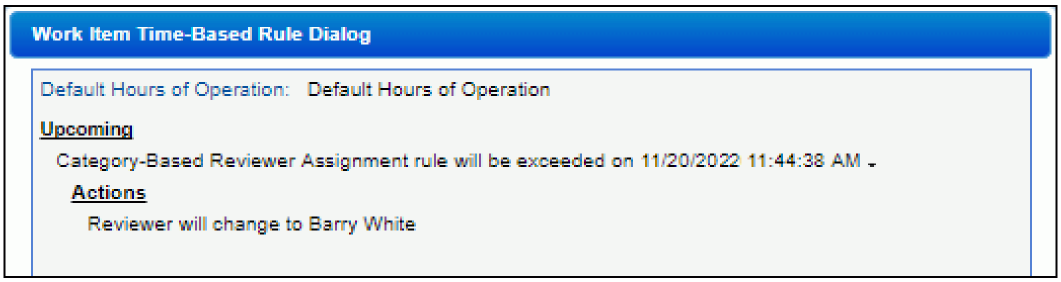
Review Date - If approvals are enabled, select the date on which to send a knowledge entry review notification to the support representative in the Reviewer field. Note: this field can be edited only by knowledge approvers.

Description/Resolution - Use the fields to enter a detailed description of the issue and resolution. Note: The Find | Knowledge for Categorization feature in the Incident, Problem, and Change (if enabled) screens searches for knowledge entries based on categorization. When a knowledge entry is found, the Capture Solution feature will paste the issue description and resolution from the knowledge entry into the record.

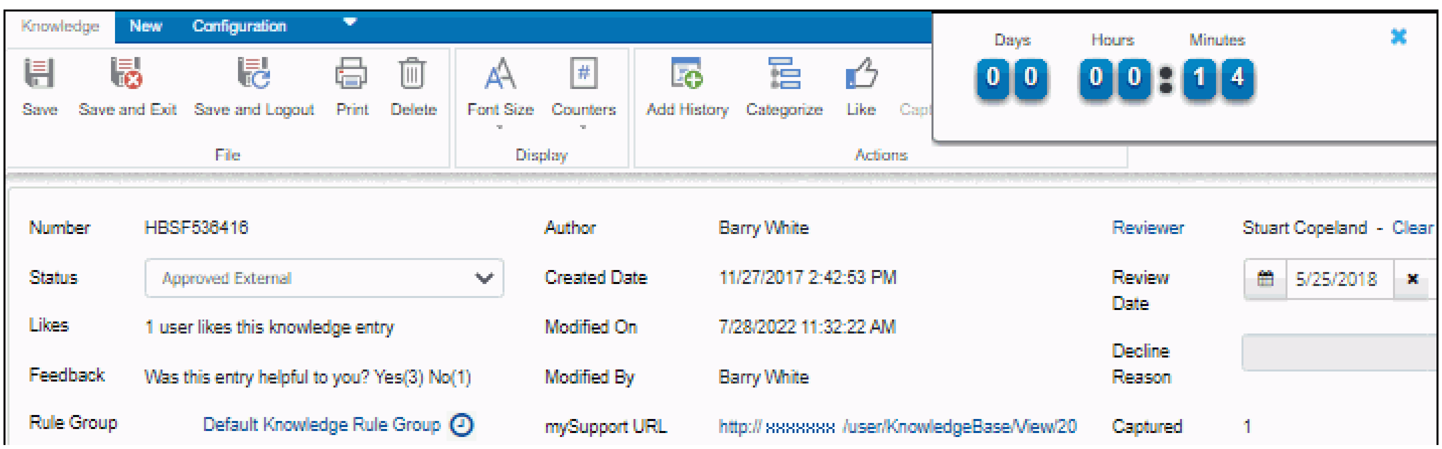
Displaying Rule Information

Rules can be configured to automatically perform actions when conditions are met upon save of a record or after a certain time interval. Actions can include changing knowledge entry field values and sending notifications. Rules are included in rule groups that are applied to category combinations; a default rule group will apply if none are applicable. When a knowledge entry is saved, the matching rule group is first determined and then all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed.

Click the name of the rule group in the Rule Group field to display the Time-Based Rule dialog with actions that will be and have been taken by any time-based rules in the current rule group. Note that entries will include the term "fulfilled" if a rule is invalidated or reset due to a change in rule configuration. Time frames reflect the assignee's support center time zone; the actual action dates and times will depend on execution of the Time-Based Rule agent.

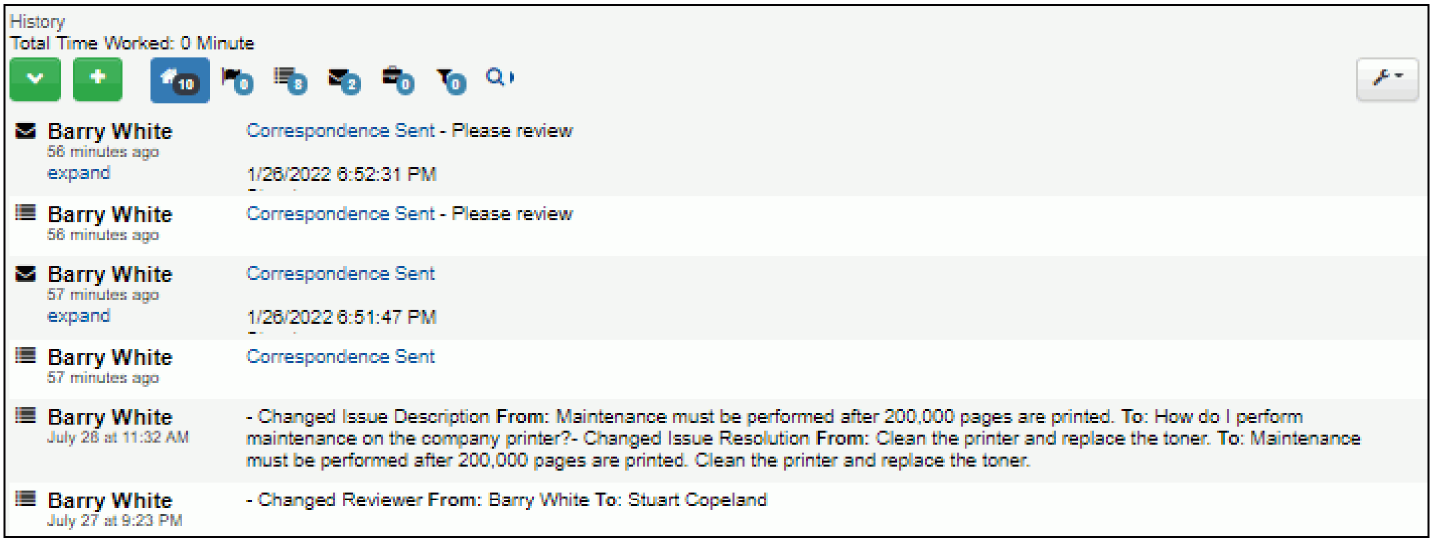


Click the Countdown icon to display a dialog containing a countdown clock with the time remaining until the next action. If a pending time-based rule has not been exceeded, a blue countdown clock will appear; if the time-based rule has been exceeded, a red countdown clock will appear and the numbers will increment to display the amount of time that has passed since the time at which the rule was last exceeded. Use the Show Seconds on Countdown field in the Preferences screen to control display of the Seconds portion of the countdown clock.

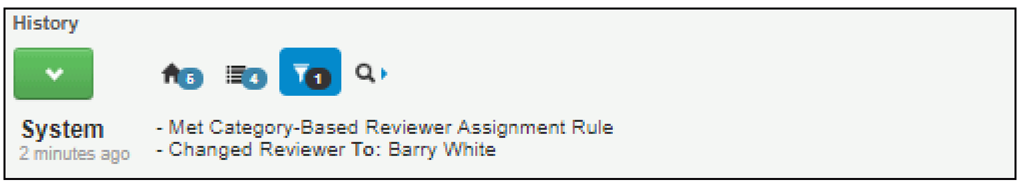


Viewing History

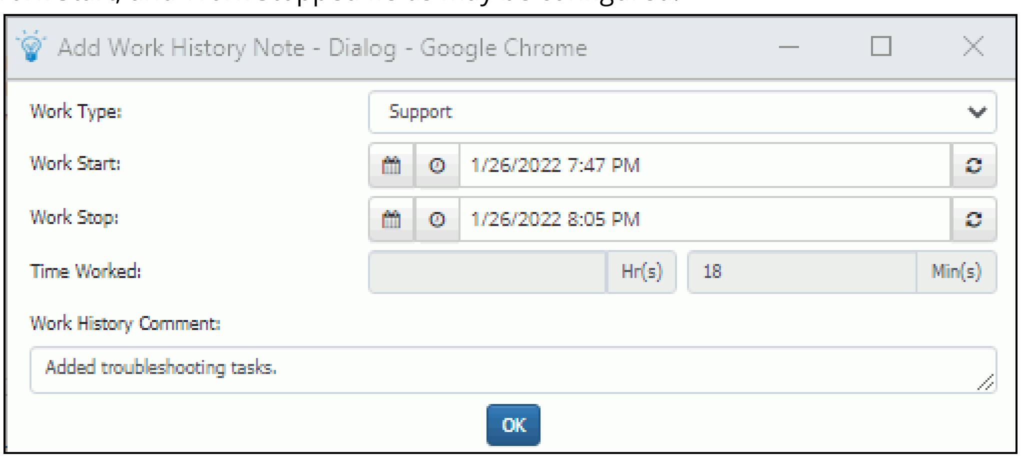
Use the History field to view notations on all knowledge entry actions.



- The Feed option displays a list of all actions performed on the record.
- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes).
- The Rule option displays actions taken by rules in the rule group when rule conditions have been met.



- The Search option enables you to enter a search string for searching history entries.
- Work Type, Work Start, and Work Stopped fields may be configured:



A Work Type field may be included with options for describing the type of worked performed.

Work Start and Work Stop fields may be included.

The Work Start field defaults to the date and time when you load the work item. For example, if you open a new request at 1:00 PM, work with the customer for 30 minutes, and then click the Add Work history option or save and display the Save dialog, the Work Start would be set to 1:00 PM and the Work Stop would be set to 1:30 PM. This Time Worked field would show the 30 minutes of time worked reflected by the gap.

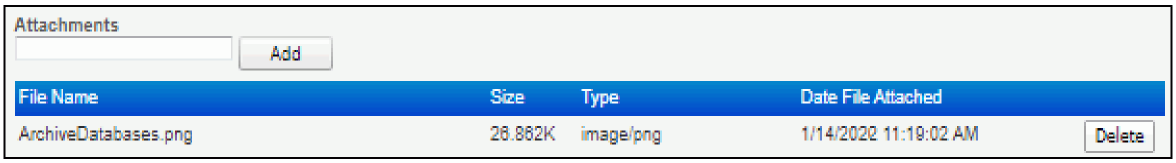
The Work Stop field defaults to the current time, but there will be at least a one minute gap between the Start and Stop times. You can type directly in the Work Start and Work Stop fields or use the calendar and clock icons to select the date and time; the difference will populate automatically. The refresh icon will set the date and time to the current date and time (but the Work Stop date and time will adjust to be at least one minute past the Work Start date and time).

Associating Incidents and Problems

Use the Add New Incident and Add New Problem links in the Associated Work Items field to create new Incident and Problem records that will be associated with the knowledge entry. The description, resolution, and categorization from the knowledge entry will be included in corresponding fields. Use the Add Existing link in the Associated Work Items field to associate existing incidents and problems with the knowledge entry.

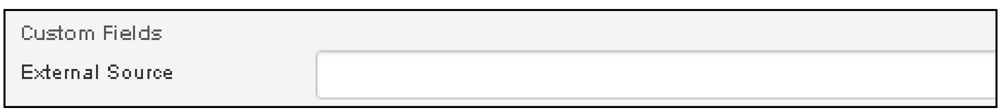
Attaching Files

To attach a file to the knowledge entry, click the Add button in the Attachments field and select the file.



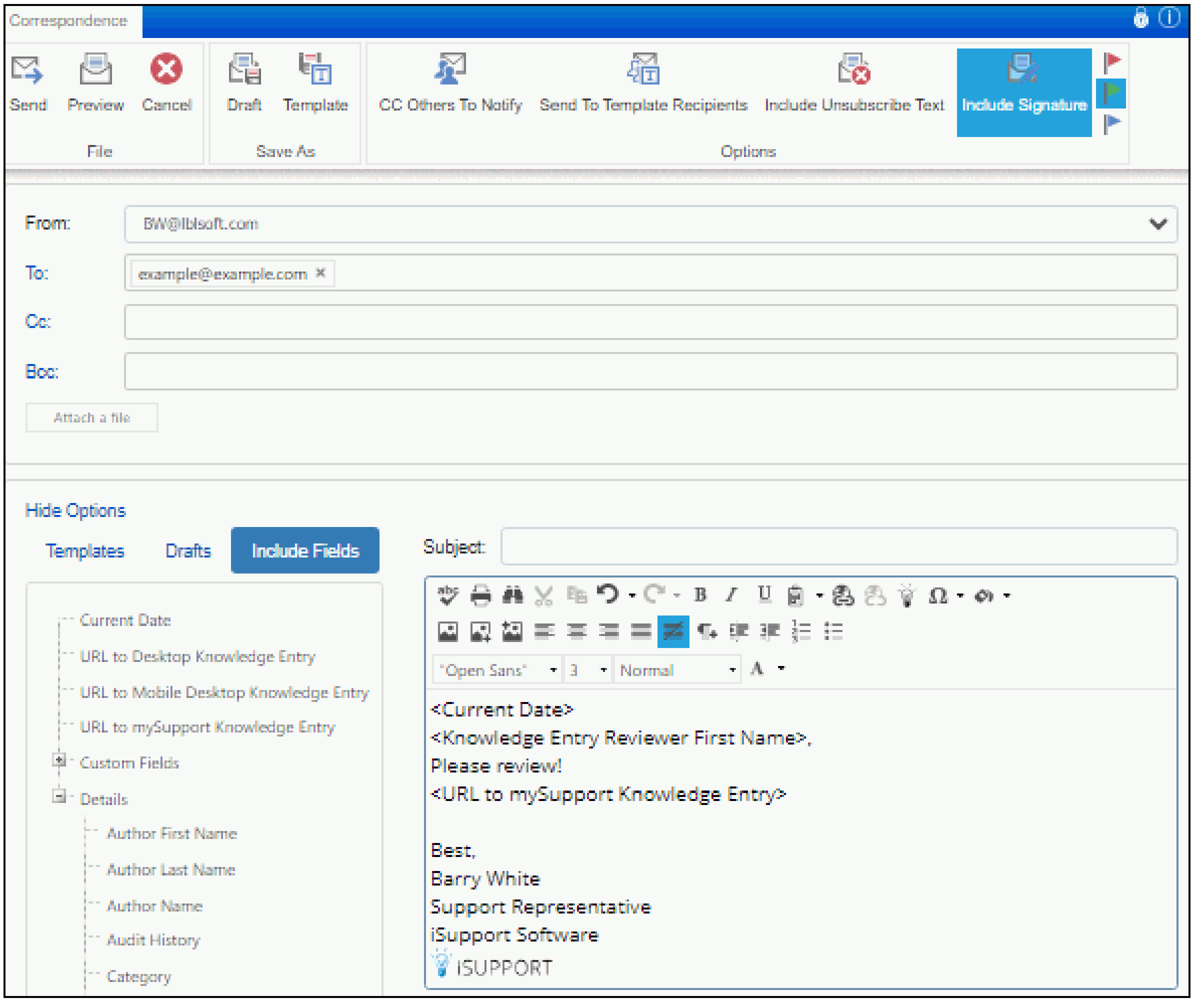
Completing Custom Fields

Custom fields may be configured for entering information specific to your company. You may be required to enter information in these fields and if a record is recategorized, data saved in custom fields is retained and the custom fields associated with the newly-selected category set are added.



Using Correspondence Functionality

To send an email from the Knowledge screen, select New | Correspondence.



- In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. You can set the default for this field via the Default From Address field on the Correspondence tab in the Preferences screen accessed via the Desktop menu. If using a correspondence template, a different email address may be included.
- Select CC:Others to Notify to include a list of people that are not directly involved to be sent event notifications and other correspondence.
- The Show Options link displays predefined personal and shared correspondence templates on the left side of the screen; select the template and click the Apply button to populate all fields with the data in the template. Templates may be configured to contain only read-only (grayed out) fields, and some or all of the fields may be populated. Note that when you apply a template a second time, it will overwrite the data in all fields, including attachments. You can select Save As | Template to save the current text in the Correspondence screen fields as a personal correspondence template.
- The Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).
- Additional recipients may be included in the CC field when you preview a correspondence if the CC:Others to Notify feature is enabled for a selected template.
- Use the Include Fields button in the Options panel to display fields from the current record; these fields will be replaced with corresponding data from the originating screen when the email is sent. (If data does not exist for a value, nothing will be inserted when the email is sent. The field area will be blank.) You can drag applicable fields to the message body. You can append **:label:*string*** to the <URL to x> include fields so the link displays as linked text rather than the full URL. The <Rep URL to Read Online> and <mySupport URL to Read Online> include fields will include a link for viewing the email on the web (typically for customers who aren't able to see an email properly rendered with linked images via their mail client).

- Select Preview to view the email using values from the record in which the correspondence originated.
- You can select Save As | Draft to save a draft of the current text in the Correspondence screen fields in the Drafts section of the Options panel. Drafts are listed by subject line text.

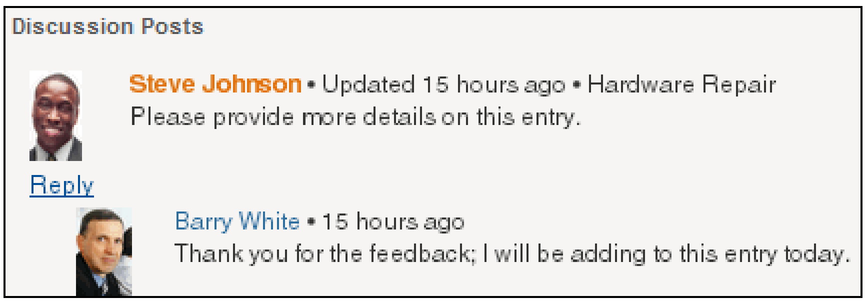
When finished completing fields in the Correspondence dialog, select Send. Note that the correspondence may be subject to approval before sending if the Mass Mailing Approval feature is enabled.

After the email is sent and the originating record is saved, notations are included in the History field. You can use the Correspondence option on the View menu to display correspondence associated with a record.

Adding Feedback

Displaying and Replying to mySupport Discussion Posts

If discussion posts are enabled for the mySupport portal, the mySupport Discussion Posts field will include posts entered by authenticated customers via the mySupport portal. You can click the Reply link to add a reply that will appear on the discussion feed. Note that discussion posts and replies can be deleted if enabled in Support Representative Profile record.



Adding a "Like" to a Knowledge Entry

Select Knowledge | Like to register a "like" for the knowledge entry. The number of likes are included in a running total that appears in the Knowledge screen; this number can also be configured to appear on mySupport.

Accessing Views

A View frame is included at the bottom of the screen for accessing views of iSupport data. It will be minimized by default; click the up arrow icon to expand and collapse the frame. Select Open In New Window to display the view in a new window. Your selected view and settings will be stored in a cookie, so your selection will be retained until you change it again.