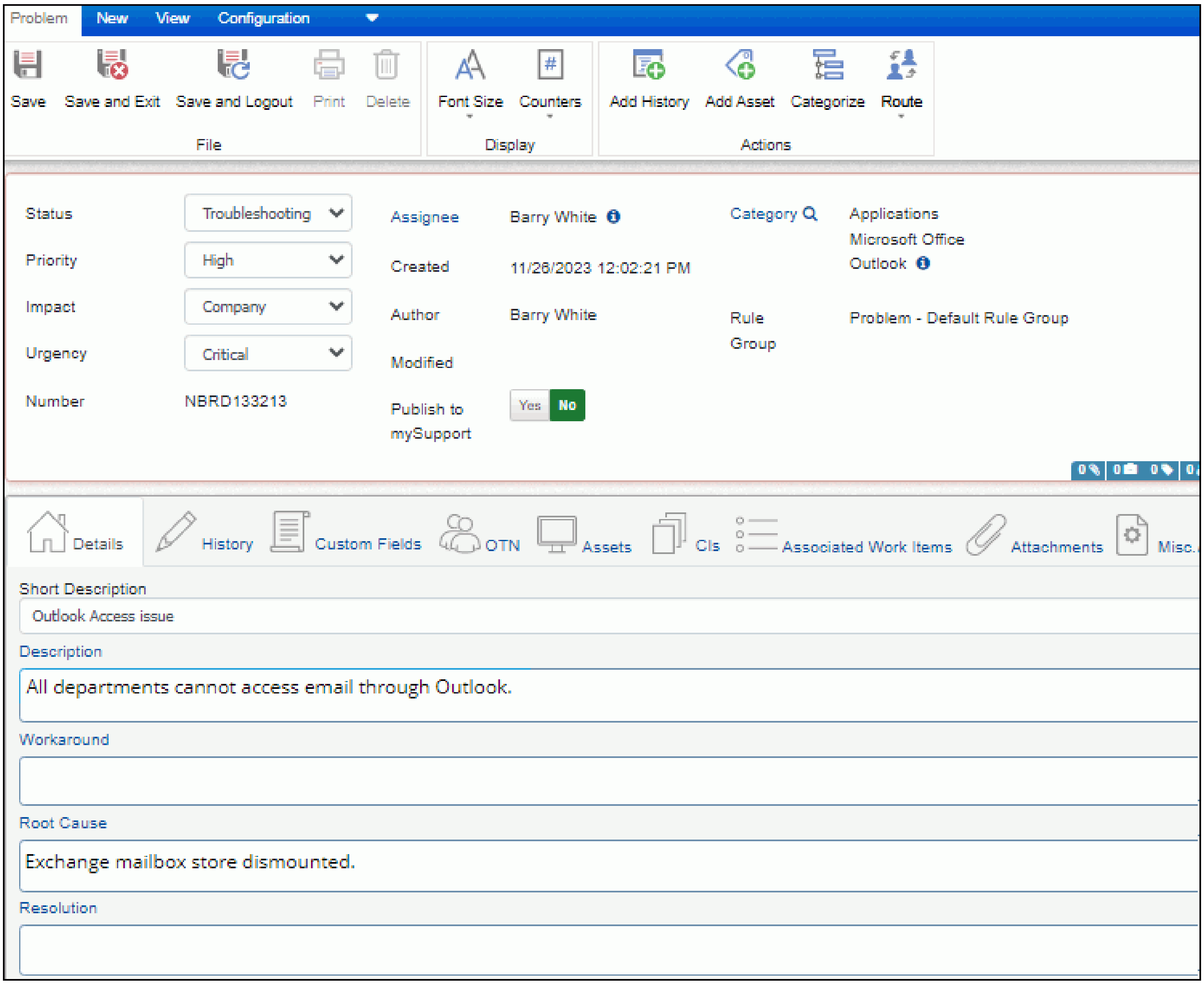
Using the iSupport® Problem Screen

Access the Problem screen via the Desktop Create menu. The only information required in order for a Problem record to be saved is the categorization, short description, any required custom fields, and a custom number if applicable. The resolution is also required in order for a Problem record to be closed.

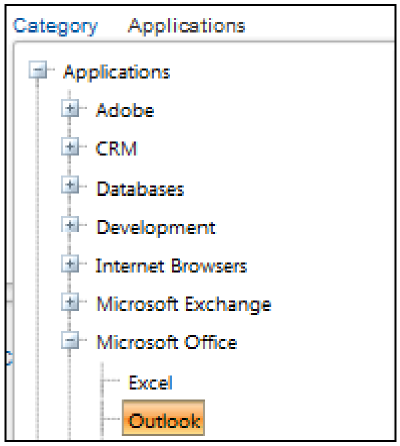
Note: The fields and layout in the Problem screen are set up in the Configuration module. Fields or functionality may not display if disabled or disallowed due to permissions set during configuration. The following sections contain information on **all** Problem functionality.



Categorizing the Problem

Categories are used for routing, reporting, incidents, Change records, and knowledge entries. Categories are enabled in sets of up to five levels; the first level is fairly general and the last level is fairly specific.

To select a category set, click the Categorize icon or click the Category link. Predefined categories appear; select the one that best describes the problem.

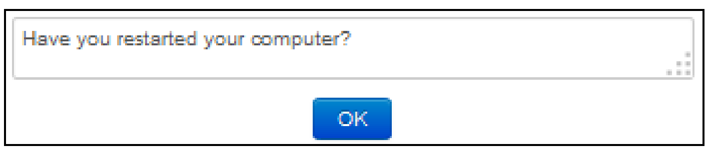


If there are other incidents, knowledge entries, headlines, problems, or changes that have the same categorization, the View Open Work Items for Categorization link appears for you to view these items. You can associate knowledge entries, headlines, incidents, and changes with the current record if applicable.

A configuration option can be set to close the associated incidents when a Closed status is selected for the problem. The Closed status assigned to the closed incidents can also be configured. See “Associating Other Work Items and Files” on page 16 for more information.

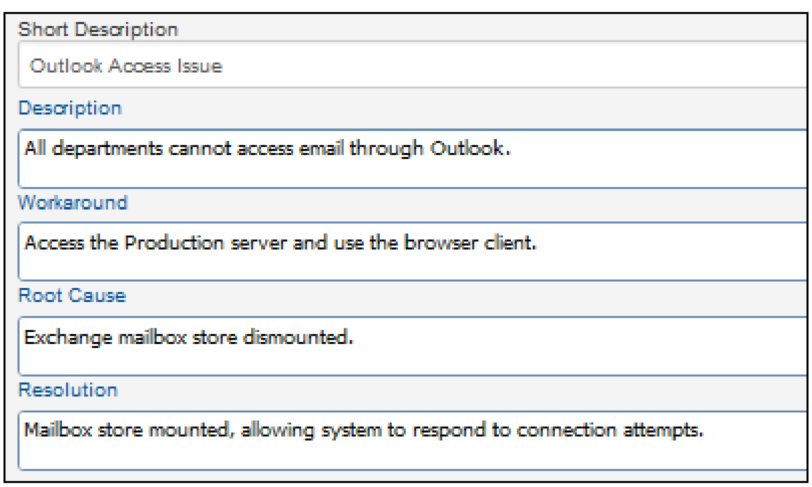
Completing Call Scripts

Call scripts are associated with specific category combinations and can contain instructions on gathering information, a list of questions to ask, or other related items. If a call script is associated with the selected category set, the script appears in a dialog when the category set is selected. Follow the script, enter responses to questions if applicable, and click OK.



Entering the Description, Workaround, Root Cause, and Resolution

Use the Short Description, Description, Workaround, Root Cause, and Resolution fields to enter details and troubleshooting information regarding the problem.

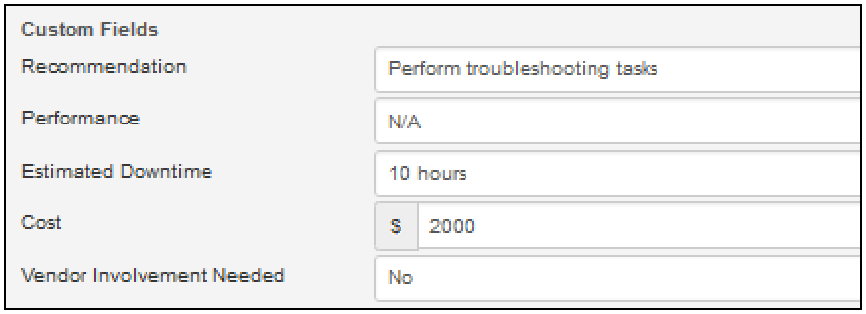


- **Workaround** - enter details regarding any temporary methods of overcoming the problem. When an entry is made in either this field or the Resolution field and the record is saved, the record is designated as a Known Error.

- **Root Cause** - enter details regarding the actual cause of the problem.
- **Resolution** - enter details regarding the solution to the problem. When an entry is made in either this field or the Workaround field and the record is saved, the record is designated as a Known Error.

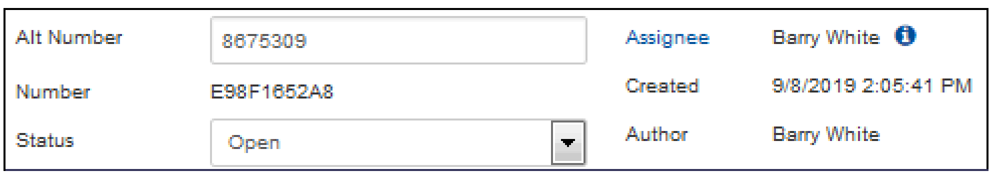
Completing Custom Fields

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



Entering a Custom Number

A unique number is automatically assigned to each Problem record. A custom incident number field may also be configured; an entry may be required.

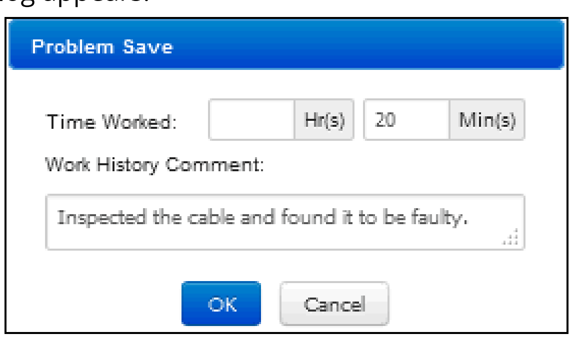


Saving the Problem

Do one of the following:

- To save a problem without closing the window, select Problem | Save.
- To save a problem and close the window automatically after completing the Problem Save dialog, select Problem | Save | Save and Close.
- To save a problem and close the current session, select Problem | Save and Logout. This option is enabled in configuration and is typically used when accessing a problem via a link in an email.

If configured, the Problem Save dialog appears:

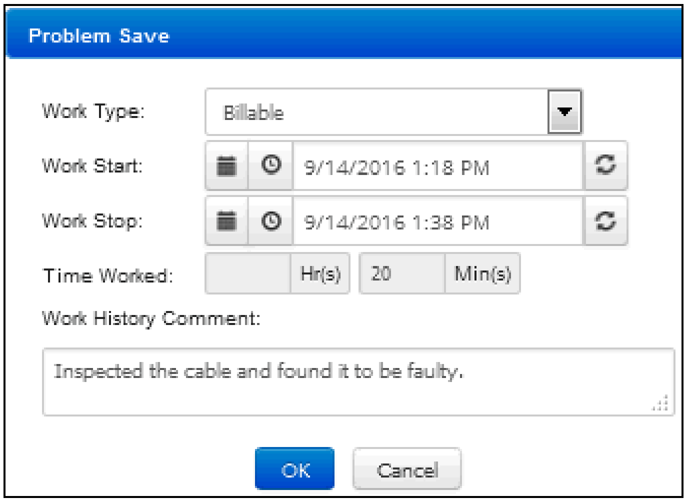


If applicable, enter the hours and minutes you worked on the problem in the Time Worked field and enter information on any activities related to the change in the Work History Comment field. (You can also enter this information in the History field.)

If configured, Work Type and/or Work Start and Work Stop fields may be included in the Save dialog. Options in the Work Type field are specified in configuration.

The Work Start field defaults to the date and time when you load the work item. For example, if you open a new Problem record 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).



Selecting an Assignee

To route a Problem record, you can either click the Route icon or the Assignee link. (Note that you can also route one or more changes via the Desktop.) There are several methods of routing; some or all of these methods of routing may be available to you depending upon configuration settings.

- **Group Based/Standard:** A list of groups appears; when you select a group, a list of support representatives in the group appears for selection. (These groups are set up in Support Representative records.)
- **Group Based/Load Balanced:** The available support representative within the selected group with the lightest overall workload will be selected.
- **Group Based/Round Robin**: The support representative in the group who was assigned a problem using the round robin method on the oldest date and time is selected.
- **Location Based/Standard:** A list of all available support representatives in a selected location appears.
- **Location Based/Load Balanced:** The available support representative within the selected location with the lightest overall workload will be selected.
- **Location Based/Round Robin:** The support representative in a selected location who was assigned a problem using the round robin method on the oldest date and time is selected.
- **Name Based/Standard:** A list of all available support representatives appears.
- **Name Based/Load Balanced:** The support representative with the lightest workload is selected.
- **Name Based/Round Robin:** The support representative who was assigned a problem using the round robin method on the oldest date and time is selected.
- **Skill Based/Standard:** The category levels selected for the problem will appear; select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative(s) with those skills will appear for selection.

- **Skill Based/Load Balanced:** After you select the level of categorization for which support representative skills should be searched, a support representative is selected based on the workload of the support representatives who have the exact match of the selected categorization in their Support Representative record.
- **Skill Based/Round Robin**: After you select the level of categorization for which support representative skills should be searched, support representatives who have the exact match of the selected categorization in their Support Representative record are considered. The support representative who was assigned a problem using the round robin method on the oldest date and time is selected.
- **Location by Skill/Standard:** Support representative locations will appear; after selecting a location, the category levels selected for the problem will appear. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representatives in the selected location with matching skills are listed for selection.
- **Location by Skill/Load Balanced**: Support representative locations will appear; after selecting a location, the category levels selected for the problem will appear. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative in the selected location with matching skills and the lightest workload is selected.
- **Location by Skill/Round Robin**: Support representative locations will appear; after selecting a location, the category levels selected for the problem will appear. Select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representatives in the selected location with matching skills are considered; the support representative who was assigned a problem using the round robin method on the oldest date and time is selected.

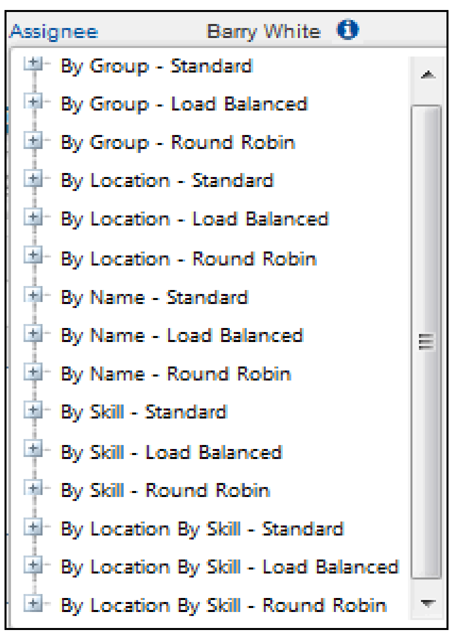
Load balanced routing involves weights based on priority; these weights are set up during configuration.

If a support representative has worked with a problem and the problem is reassigned, he/she will be bypassed until all available support representatives with the skill or in the group or location (depending on the method selected) have worked with the problem.

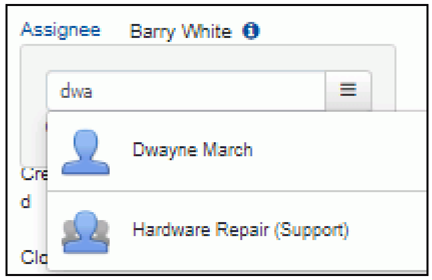
If you selected **skill based standard routing**, the categories selected for the problem appear; select the level for which associated support representative skills should be searched. Support representatives with skills/categories in their Support Representative records that *exactly match that categorization level* will display for selection.

If you selected a method with **load balanced routing**, the name of the person calculated to have the lightest workload will appear. Click Back to re-select routing options or Finish to assign the support representative.

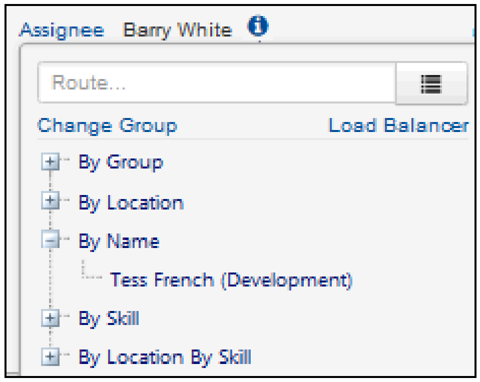
If you use the Route icon or Assignee link with the Tree Selector icon, all of the configured routing methods and options will appear.



If you use the Assignee link, you can perform a standard name-based route by entering the first few letters of a support representative's name:



You can also click the Load Balancer link to display the name of the support representative calculated to have the lightest workload for each routing method.



To view the assignee's contact information, skills, and groups, click the View Rep Details link after clicking the information icon next to the Assignee field.

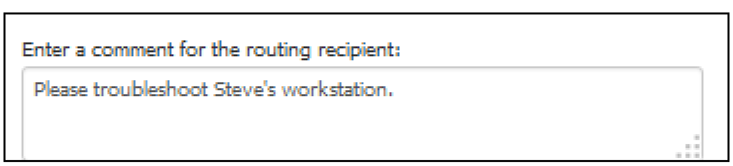
A permission can enable you to route to unavailable support representatives; if you have this permission, support representatives who are unavailable for routing will be included with an asterisk.

Routing to Yourself

To route a problem to yourself (for example, if problems are first routed to a queue), click the Route to Self icon. This bypasses routing dialogs. If you are not a member of the current assignee's group, your primary group will be used. If you wish to change your group, you'll need to use the Change Assignee's Group option or the routing dialogs (via the Route icon or Assignee link).

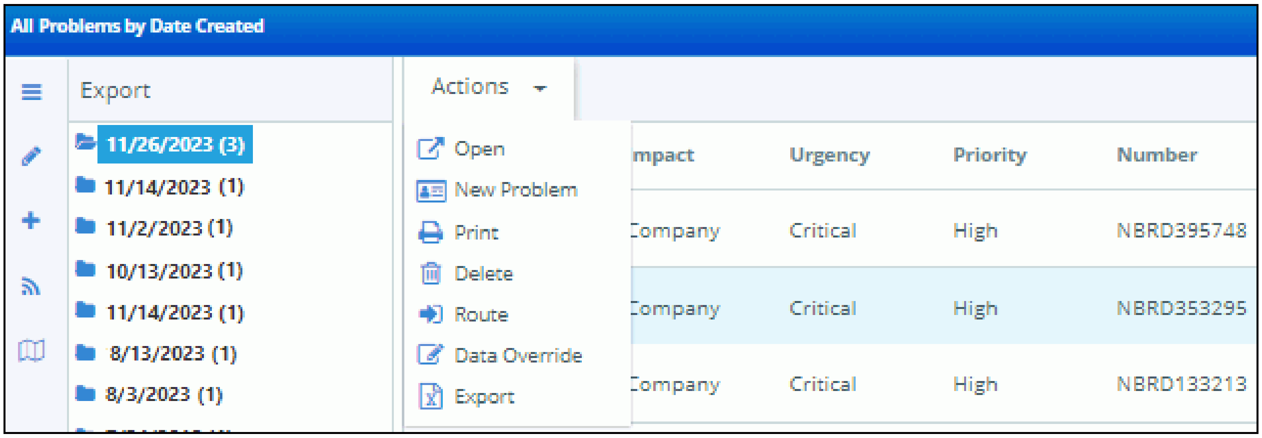
Entering Routing Comments

Once you click Finish, if routing notifications are enabled in configuration for reassignment, the Routing Comment dialog appears for you to enter a note to be included in the notification email to be sent to the new assignee. The note will be on the first line of the email.



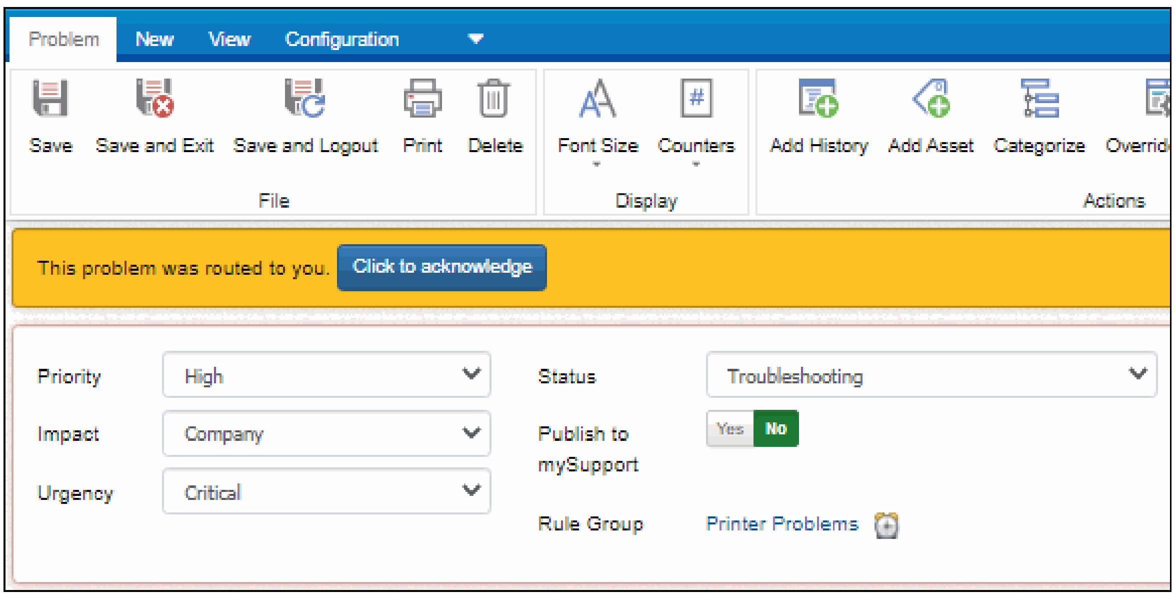
Routing Multiple Problem Records via the Desktop

You can route a problem with an Open status from a view on the Desktop. Select the problems to route and then select the Route action. The routing dialogs will appear as in the Problem screen, except the skill-based routing and location by skill based routing methods will not be available. If load balanced routing is used, the selected Problem records will be distributed evenly to the available support representatives in the selected group, location, or all (if using name-based routing). The same comment will be applied to all routed problems.



Acknowledging a Routed Problem

If problem acknowledgments are enabled in configuration, the following alert bar will appear at the top of the Problem screen for the new assignee:

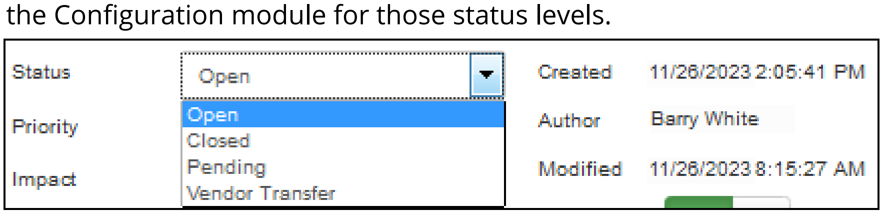


When the assignee clicks the Click To Acknowledge button, an entry will be recorded in the Audit History field and an acknowledgment notification will be sent if configured.

Selecting the Status, Impact, Urgency, and Priority

Selecting the Problem Status

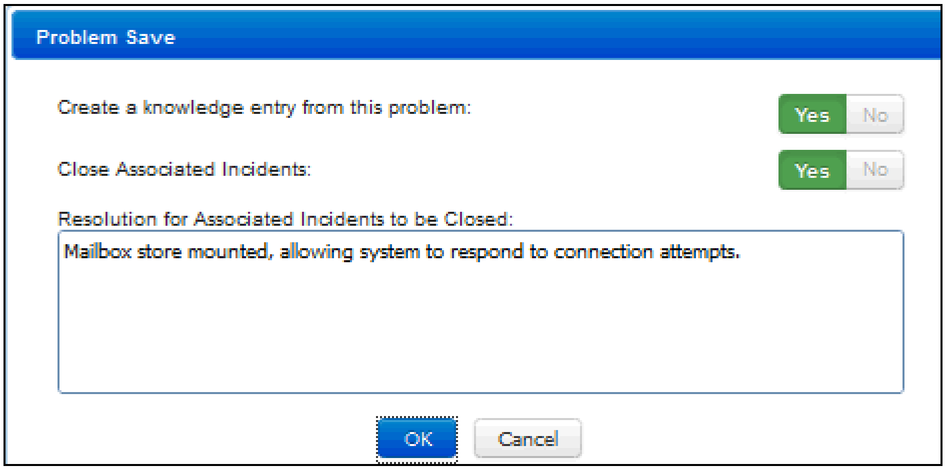
Use the Status field to designate the problem status. There are two basic status levels: Open and Closed. Different labels can be set up in the Configuration module for those status levels.



Closing the Problem

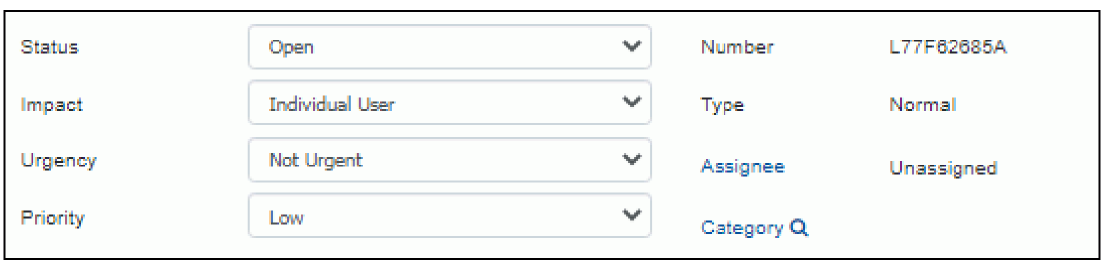
In order for a problem to be closed, entries must be made in the Categorization, Short Description, and Resolution fields. If configured, a prompt will appear for creating a knowledge entry. The knowledge entry will have a status of Pending Approval and will include the following from the Problem record: categorization, resolution, and short description as the issue description.

If configured, the Save dialog will include the knowledge prompt along with a field for closing incidents associated with the problem.



Selecting the Impact, Urgency, and Priority

Prioritization encompasses urgency (based on the amount of time a resolution is needed) and impact (usually the number of users affected). The Impact and Urgency values are defined and associated with the priority levels of Low, Medium, High, and Emergency in the Configuration module; these defined values will be available in the Impact and Urgency fields for selection. The mapped priority will appear as default but all priority levels are available if permissions are configured for you to change the priority.



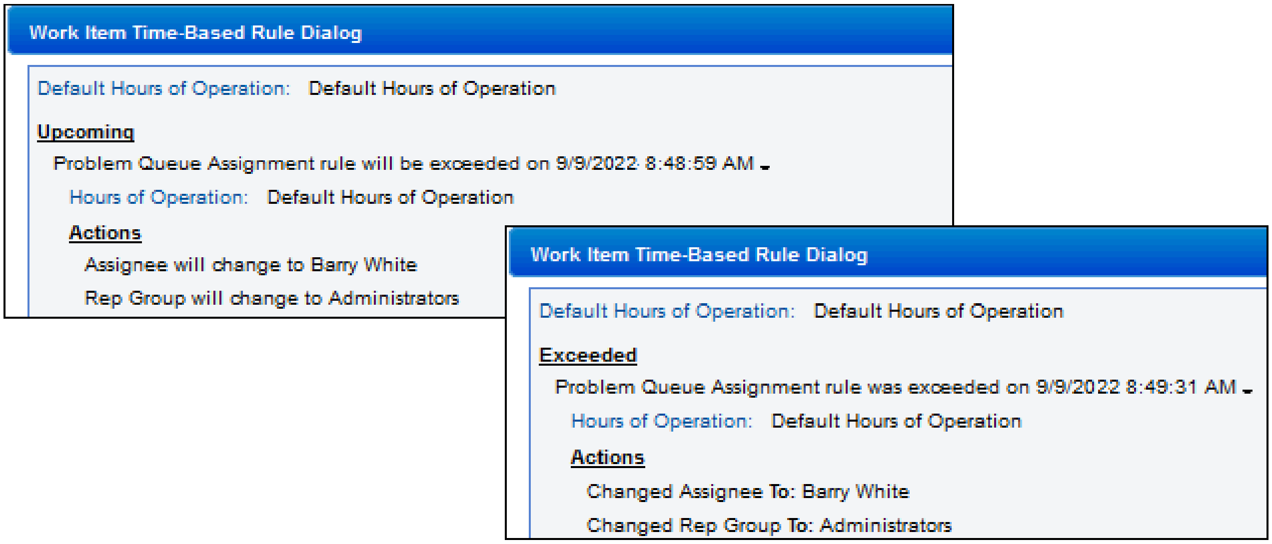
Examples of Impact, Urgency, and Priority mappings include:

Impact	Urgency	Priority
Individual	Minor	Medium
Department	Major	High
Company-wide	Minor	Medium
Company-wide	Critical	Emergency

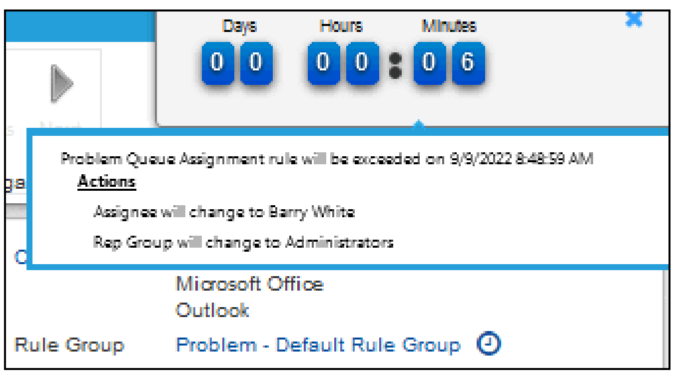
Displaying Rule Group Information

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 problem field values, routing via load balancing or the round robin method, sending notifications, and posting data to a web application. Rules are included in rule groups that are applied to problems through category combinations; a default rule group will apply if none are applicable. When a problem is saved or an incoming email update is received, 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. The online help contains more information on rules.

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. The Hours of Operation link displays the time frames in which the rule group is in effect. 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 in the upper right corner 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 and the numbers will increment to display the amount of time that has passed since the time at which the rule was last exceeded. You can use the Show Seconds on Countdown field in the Desktop Preferences screen to control display of the Seconds portion of the countdown clock.



To display all actions that have been performed by rules, use the Rule option in the History field.

Using Communication Features

Specifying Others to Notify and Sending an Email

If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and support representatives that are not directly involved in the Problem process to be sent event notifications and other correspondence. For example, notifications could be configured to be sent to a salesperson whenever a Problem record is created for one of their accounts. An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual incident, problem, change, or configuration item.

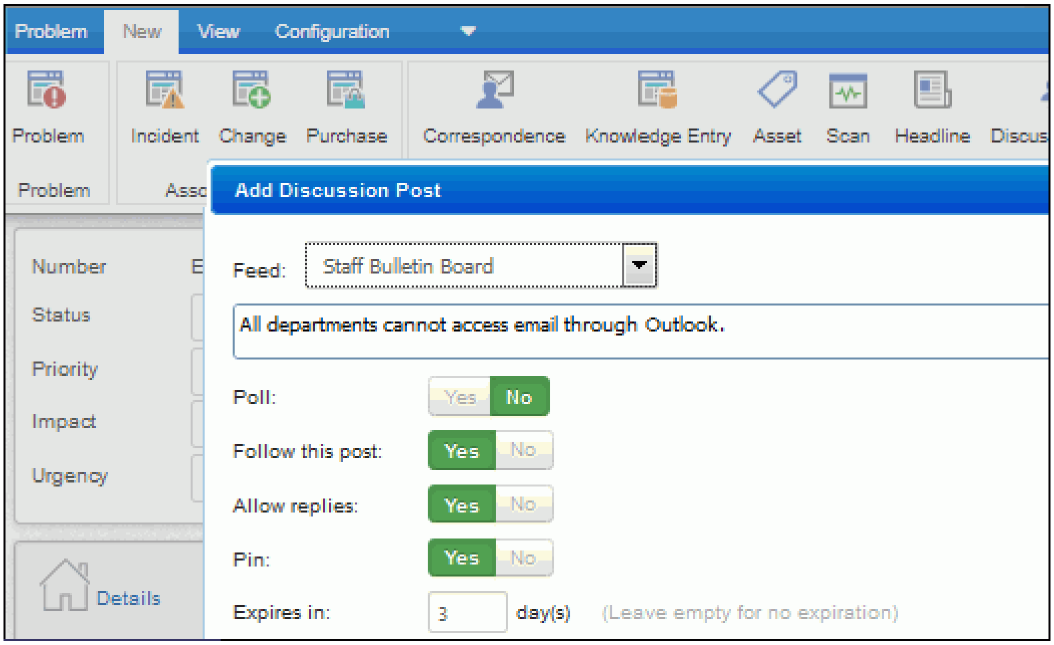
To send an email from the Problem screen, you can select New | Correspondence. You can click the Details icon next to the Assignee field and then click the Email link to populate the To field with the assignee's email address.

Creating a Headline

Use the New | Headline option to create a new headline from the Problem screen. The Headline entry screen will appear with text in the Description and Resolution fields by default.

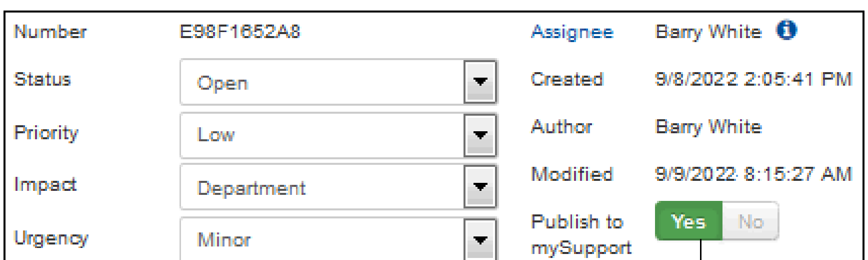
Creating a Discussion Post

Use the New | Discussion option to add a post to a selected discussion feed. The description and resolution are copied in by default. Select Yes in the Allow Replies field to prevent the Reply link from appearing on the post. Select Yes in the Pin field to retain the post at the top of the feed for the number of days in the Expires In field.



Publishing to the mySupport Portal

Select the Publish to All mySupport checkbox to display the problem on the mySupport portal in a mySupport news feed.



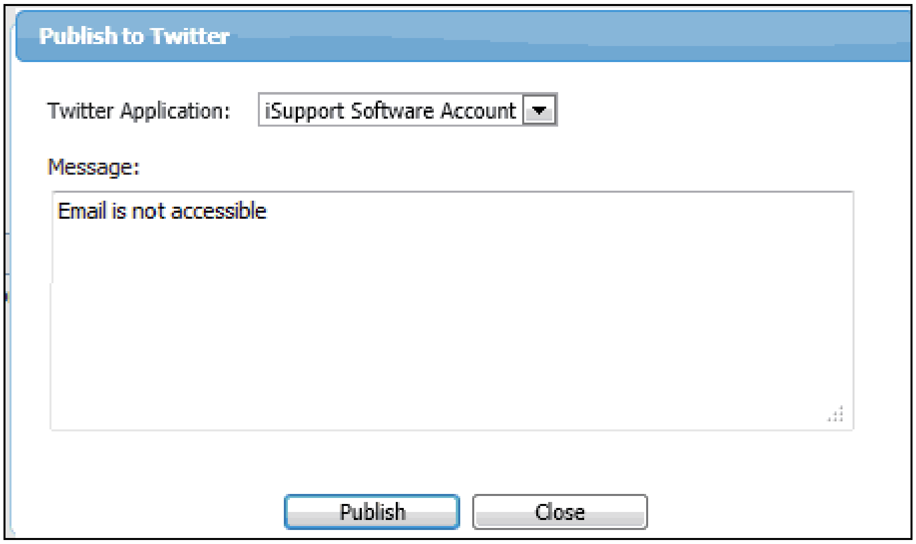
Select to display the problem on the mySupport portal

If configured, users can click the Create Incident button to submit an incident that will be associated with the problem. The text in the Short Description field will be included by default in the Description field in the Incident record.

Publishing to Twitter

The Twitter® icon will appear in the Problem screen if you have the Publish to Twitter permission and a Twitter application has been configured; when clicked, the Publish to Twitter dialog will appear with the short description.

Enter the text to publish to Twitter. If multiple Twitter applications have been created, you can select the account to which the problem should be published.



Using Awareness and Chat Functionality

If configured, the Awareness feature displays a Connected Reps icon and alert if two or more support representatives have the same record open. You can click the icon to display the support representative(s) viewing the work item and initiate a chat by clicking on their name.

If a support representative is viewing a problem and another support representative modifies and saves a field on that problem, a Problem Modified dialog will appear with the changes that were made. Note that this dialog will also appear for modifications done via Desktop views.

If you are using Google ChromeTM, you can enable or disable Google's Desktop Notification feature to display a small alert at the bottom of the screen (even when the iSupport window is minimized) when you are viewing the same work item as at least one other support representative and a support representative initiates a chat with you. A prompt will appear for you to enable or disable the Desktop Notification feature; after clicking OK, a prompt will appear at the top of the screen to enable or disable desktop notifications. You can later enable or deny desktop notifications via Google Chrome's settings.

Scheduling Meetings and Tasks

If configured, a New Meeting icon will appear for scheduling a Microsoft Office Outlook calendar and/or Google Calendar meeting. You can view the schedules of meeting attendees, create a meeting, and configure a notification to be sent to meeting attendees. Use the View | Meeting icon to view scheduled meetings.

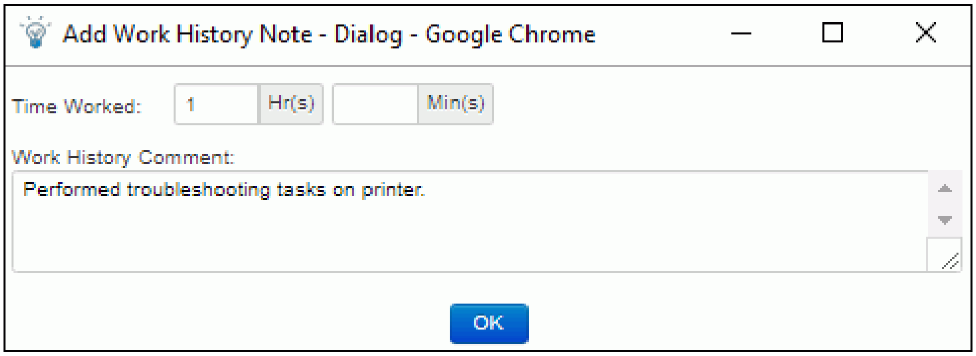
If configured, icons may appear for scheduling meetings: Microsoft Teams, Zoom, Google Meet. When the icon is selected, a Generate Join URL dialog will appear with options for entering the topic, sharing the Join URL, and emailing a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog. You can also use the Planner Task icon to access Microsoft Planner and create tasks with prefilled references to the iSupport work item number.

Adding Work History and Viewing Historical Information

Entering Work History

To enter information on any activities related to resolving the problem, click the Problem | Add History icon or the Add Work History icon in the History field. For example, you can document customer contacts or conversations with customers or support staff. This field is useful when routing a problem to another support representative because it allows them to see the work that has been performed. If enabled during configuration, call scripts are included in this field. If configured, you may be required to make an entry in the Time Worked field after entering work history.

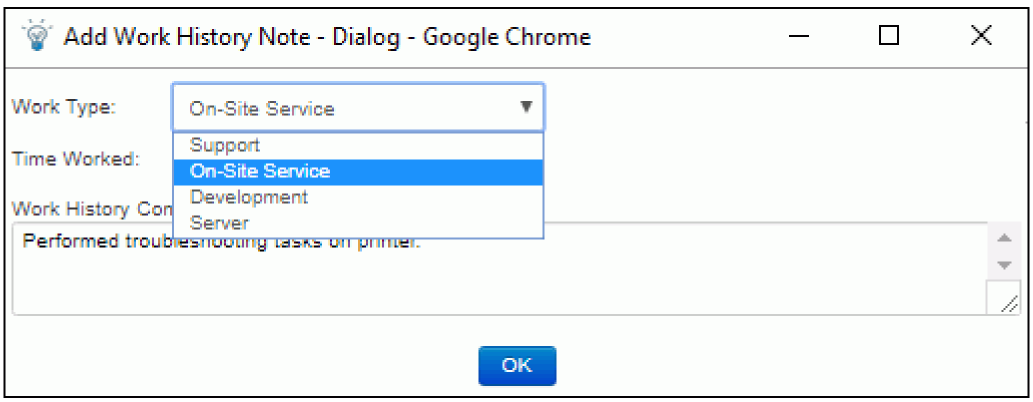
To enter information on any activities related to a change, use the Add History ribbon bar icon or the Add Work History icon in the History field. For example, you can document customer contacts or conversations with customers or support staff. This field is useful when routing a Change record to another support representative because it allows them to see the work that has been performed. If configured, you may be required to make an entry in the Time Worked field after entering work history.



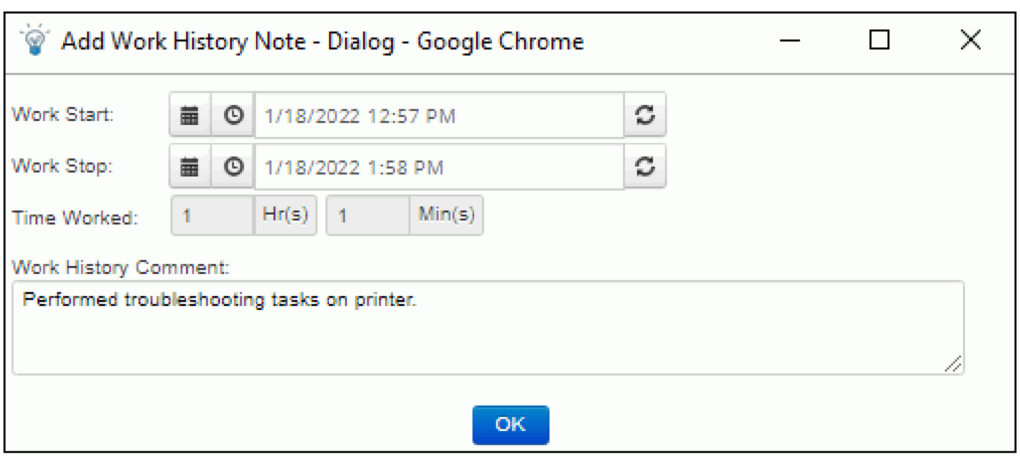
If an hours-based service contract is in effect, you can select the Apply to Service Contract checkbox to apply the amount entered in the Time Worked field to the contract.

The following options may be configured:

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



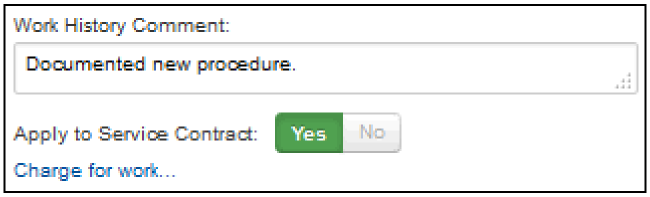
- Work Start and Work Stop fields may be included.



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.

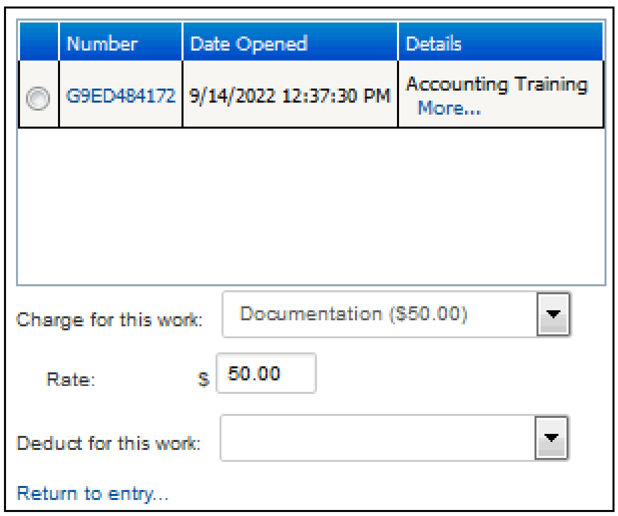
The Work Stop field defaults to the current time, but there will be at least a one minute gap between the Start and Stop times. You can type directly in the Work Start and Work Stop fields or use the calendar and clock icons to select the date and time; the difference will populate automatically. The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

- If Purchasing functionality is enabled and you are designated as a vendor in your Support Representative Profile record, you can add a charge (an amount of time worked multiplied by a rate) as a separate line item or use a charge to decrement an existing line item on an associated purchase order.After entering the time worked, click the Charge for Work link.

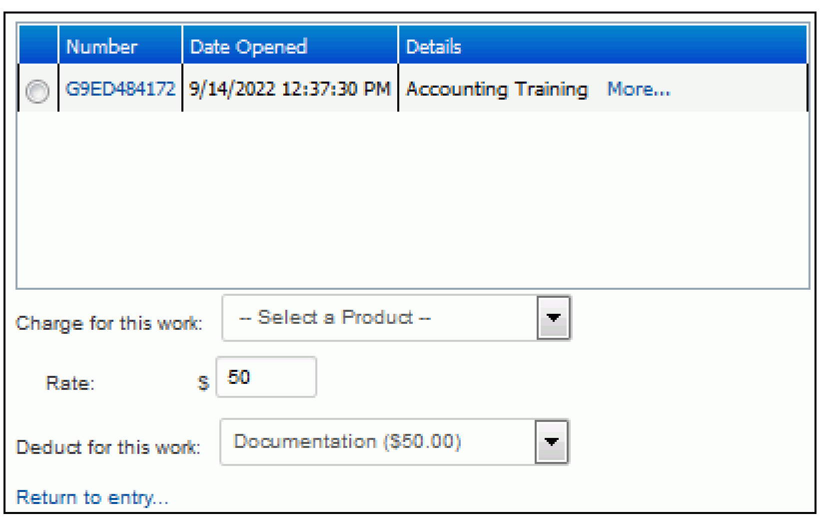


The purchase orders associated with the change appear; select the purchase order for which the charge should be applied. Then:

  - **Add a separate line item charge** to the purchase order (increasing the total amount). Choose the product from the selected purchase order in the Charge For This Work field. (Only decimal-enabled products will appear in this list.) In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog.



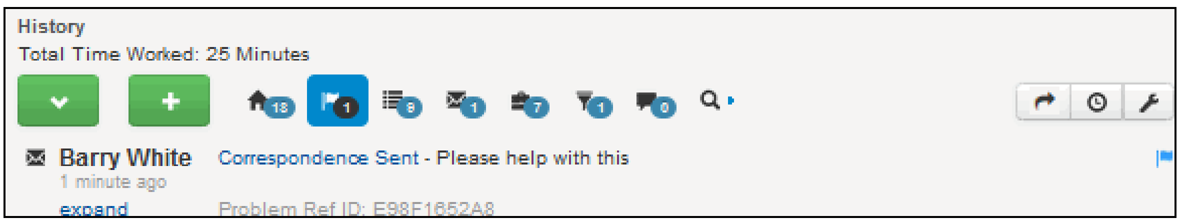
  - **Use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order. (Only decimal-enabled products will appear in this list.)



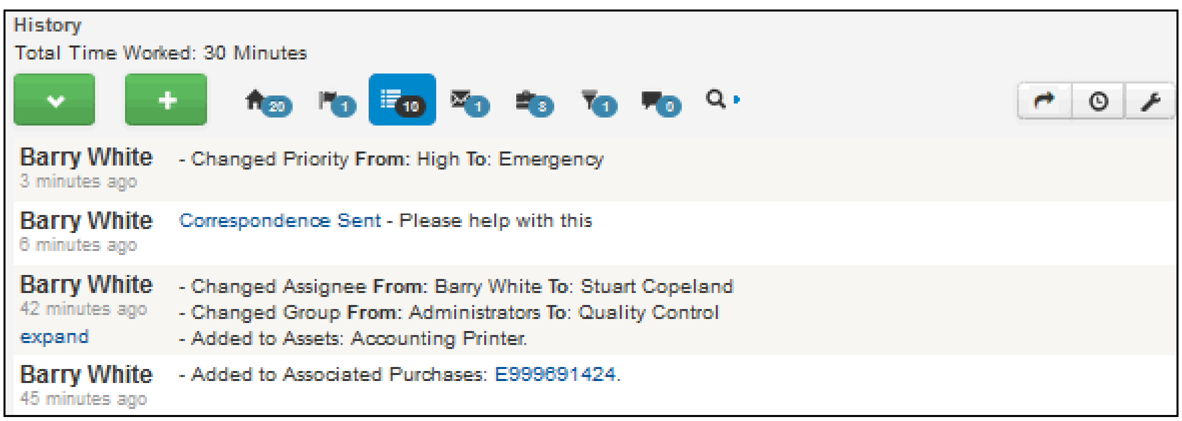
Viewing History

Use the History field to view notations on all Problem record actions. You can use the Add Work History icon to add work history, and flag work history and correspondence entries via the Mark as Important icon that appears when you hover over those entries with your cursor. Once marked, the icon changes to Unmark as Important for removing the flag. Note that the Ref ID that appears on expanded correspondence entries is included for reference; it is used by iSupport's email processing engine.

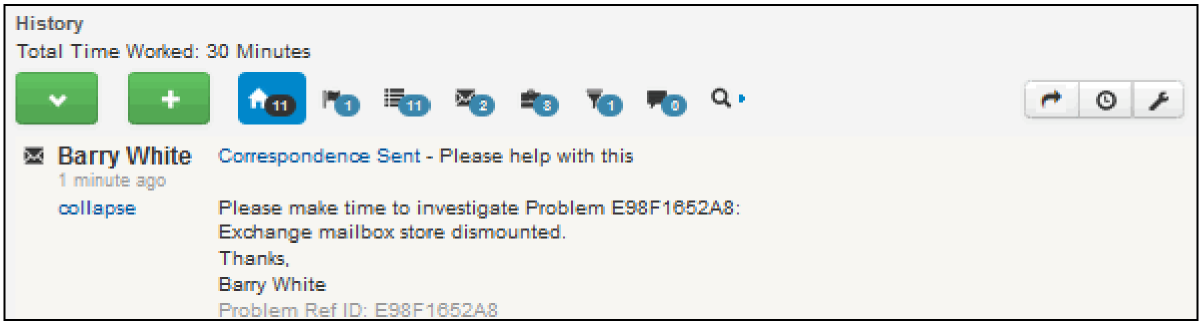
- The Feed option displays a list of all actions performed on the record; you can filter the content via the Settings icon.
- The Important option displays work history and correspondence entries that have been flagged as important via the Mark as Important icon that appears when you hover over work history and correspondence entries with your cursor.



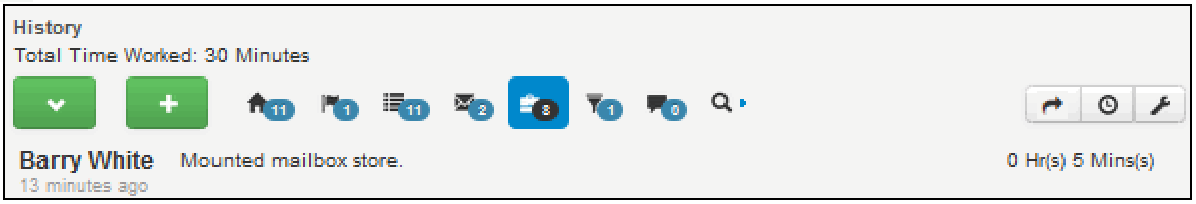
- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes), as well as correspondence entries. Work history, chat, and approval entries are not included.



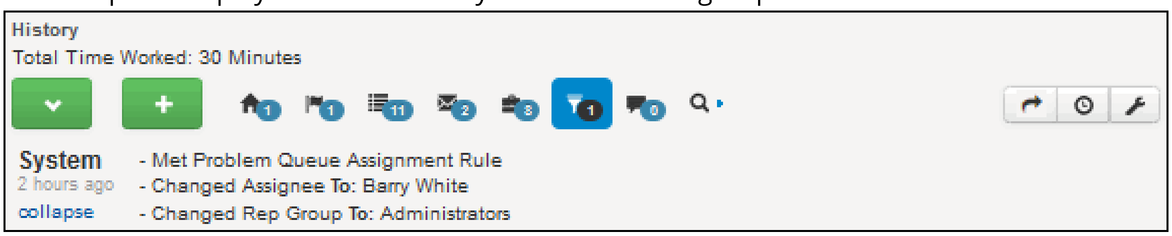
- The Correspondence option displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen.



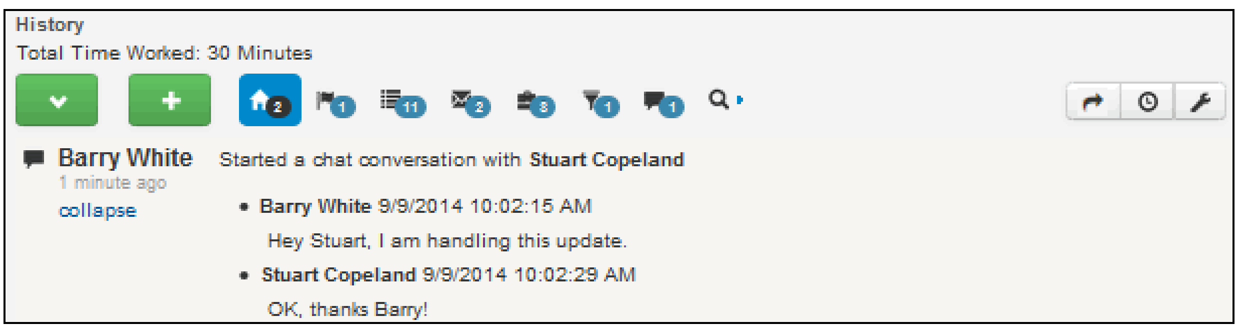
- The Work option displays entries created via the Problem | Add History and Add Work History icons.



- The Rule option displays actions taken by rules in the rule group when rule conditions have been met.

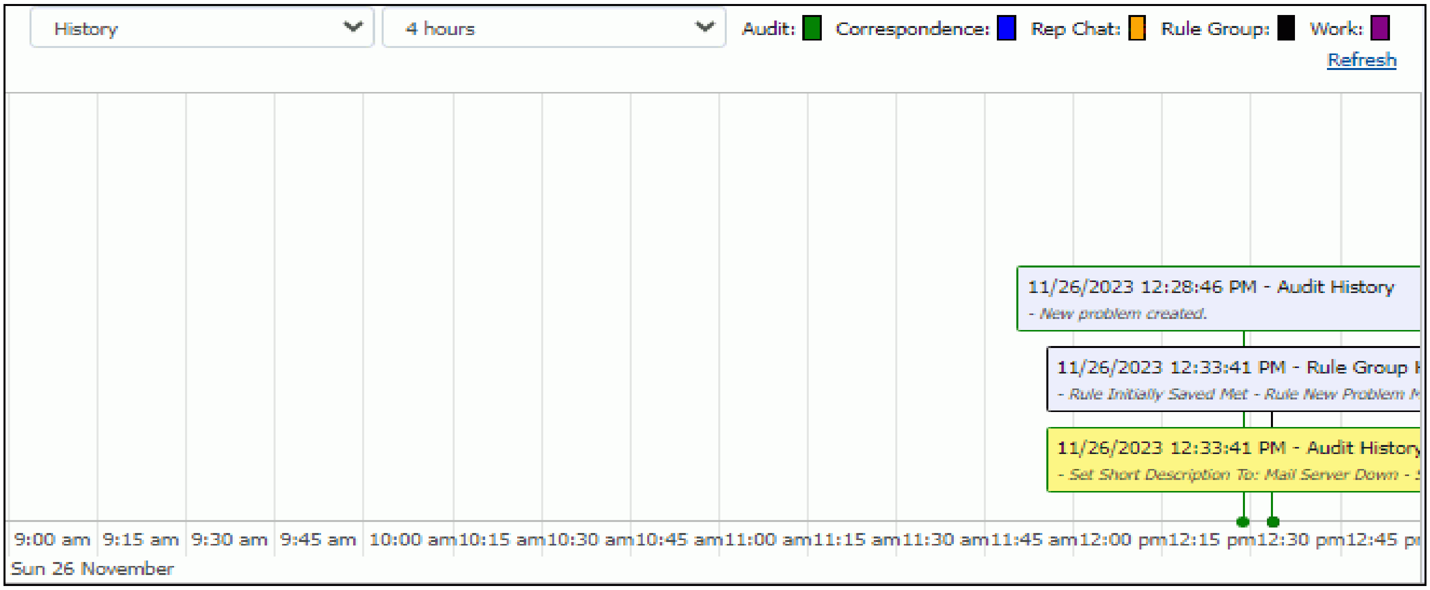


- The Chat option displays information on any chats initiated via the Awareness feature.



- The Search option enables you to enter a search string for searching history entries.

- Use the View Timeline option at the top right of the history entries displays historical problem events on a timeline. Use the dropdown fields to select the types of entries to display and the timeline increments. You can use your mouse to scroll the green hour bar and red month bar at the bottom of the screen.



Using the View Menu

Use options on the View menu to display information on:

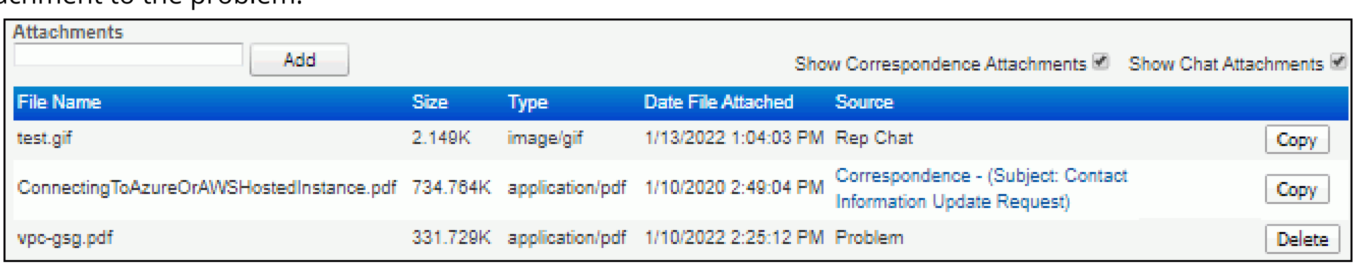
- Open, closed, or all **incidents** for the category selected for the problem.
- Open, closed, or all **problems** for the category selected for the problem.
- All **correspondence** sent for the Problem record or for the configuration item selected for the problem.
- **Knowledge** entries that have same categorization as the problem.
- The **call script** associated with the category selected for the problem.

View results will display at the bottom of the screen in the view frame. The frame 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.

Associating Other Work Items and Files

Attaching Files

To attach a file to the problem, click the Add button in the Attachments field and select the file. You can select the Show Correspondence Attachments checkbox to display attachments from all sent or received correspondence (including attachments from any inbound email update) associated with the problem. If a chat was initiated while the problem was open, use the Show Chat Attachments checkbox to display any files attached during the chat. A Copy button will be included next to correspondence and chat attachments; you can use it to directly associate the attachment to the problem.


Attachments
Add Show Correspondence Attachments Show Chat Attachments

File Name	Size	Type	Date File Attached	Source	
test.gif	2.149K	image/gif	1/13/2022 1:04:03 PM	Rep Chat	Copy
ConnectingToAzureOrAWSHostedInstance.pdf	734.764K	application/pdf	1/10/2020 2:49:04 PM	Correspondence - (Subject: Contact Information Update Request)	Copy
vpc-gsg.pdf	331.729K	application/pdf	1/10/2022 2:25:12 PM	Problem	Delete

Associating Assets and Performing Scans

You can associate Asset records with a Problem record and display any other open incidents, problems, or changes associated with the asset. You can also perform asset scans from the Problem screen. Asset scans collect hardware, software, and service details automatically on non-Windows SNMP-enabled devices in your network, computers with Windows 98 and above, or any other WMI-compliant machine (WMI must be installed and active).

Associating Other Work Items

Use the Add Existing link in the Associated Work Items field to associate an existing incident, headline, change, or purchase request/order with the problem. A configuration option can also be set to close the associated incidents when a Closed status is selected for the problem. The Closed status assigned to the closed incidents can also be configured. If configured, notifications regarding Problem events can be sent to customers of associated records. To associate new work items:

- Select New | Associated Work Item | Incident or select Add New Incident in the Associated Work Items field to create a new Incident record that will be associated with the problem. The short description and long description specified for the problem will be included in the Description field, and the categorization and priority specified for the problem will be included in the corresponding fields on the incident.
- Select New | Associated Work Item | Change or select Add New Change in the Associated Work Items field to create a Change record that will be associated with the problem. The short description and long description specified for the problem will be included in the Description field, and the categorization specified for the problem will be included in the Categorization field on the Change record.
- Select New | Associated Work Item | Purchase or select Add New Purchase in the Associated Work Items field to create a new purchase request that will be associated with the problem. The text in the Description field will be included in the Comments field on the purchase request.
- Select Add New Headline in the Associated Work Items field to create a new headline that will be associated with the problem. On the headline, the text in the Short Description field will be included in the Message field and the text in the Description field will be included in the Details field. The current problem will be included in the Associated Work Items field as well.
- Select Add New Knowledge Entry in the Associated Work Items field to create a new knowledge entry that will be associated with the problem. The description, resolution, and categorization from the incident will be included in the corresponding fields on the knowledge entry. The current problem will be included in the Associated Work Items field on the knowledge entry as well.

Associating Configuration Items

If you have the Service Desk Edition, click the Add link in the Configuration Items field to associate a predefined configuration item with the Problem record. You can click on the associated configuration item to display the Configuration Item screen for viewing the item's relationships with other items, and include information on associated configuration items in views, reports, and correspondence. If the configuration item has other open incidents, problems, or changes associated with it, "Yes" will appear along with the number of open work items. Click the link to display a list of those items.