

# iSupport<sup>®</sup> Training Course

## SETTING UP CATEGORIES

### **DESCRIPTION:**

Categories are one of the most powerful components in your configuration of iSupport. This insightful course will give you an opportunity to whiteboard an effective and well thought out category structure, and understand the ways iSupport will leverage that information for maximum efficiency. This course typically runs up to two hours.

### **TOPICS COVERED:**

Overview of Functionality Related to Categories  
Brainstorming and Drafting a Category Structure  
Entering Categories  
Associating Custom Fields and SLAs, Call Scripts,  
Others to Notify, Approval Cycles, Group Access,  
and the End User Desktop  
Category-Based Views and Reports  
Q&A as Needed

COST: \$350 per seat  
LOCATION: Online  
SCHEDULE: 2-5 days in advance

## SETTING UP CATEGORIES

### AGENDA:

#### **Overview of Functionality Related to Categories**

- Incident, problem, and change description
- Skill-based routing
- Knowledge entry searches
- Associated scripts
- Associated custom service level agreements
- Others to Notify
- Approval cycles
- Group access
- Custom Fields
- Reporting

#### **Brainstorming and Drafting a Category Structure**

- Apply/test the value/use of categories before creating
- Limit the number of level one entries

#### **Enabling Categories**

- Turning categories on
- Setting the maximum number of levels

#### **Entering Categories**

- Associating a custom SLA, approval cycle
- Call scripts
- Adding custom fields
- Designating Others to Notify
- Entering support representative skills
- Associating groups to restrict access
- Configuring the End User Desktop to display categories

#### **Category-Based Views and Reports**

- Views
- Creating SQL Reports

#### **Q & A as Needed**