



iSupport Configuration Overview

iSupport contains a basic default configuration, but it is completely customizable and you can enable only the features that are applicable to your environment. Note that iSupport is fully documented in a context-sensitive help system that you can access via the Help  Desktop menu at any time.

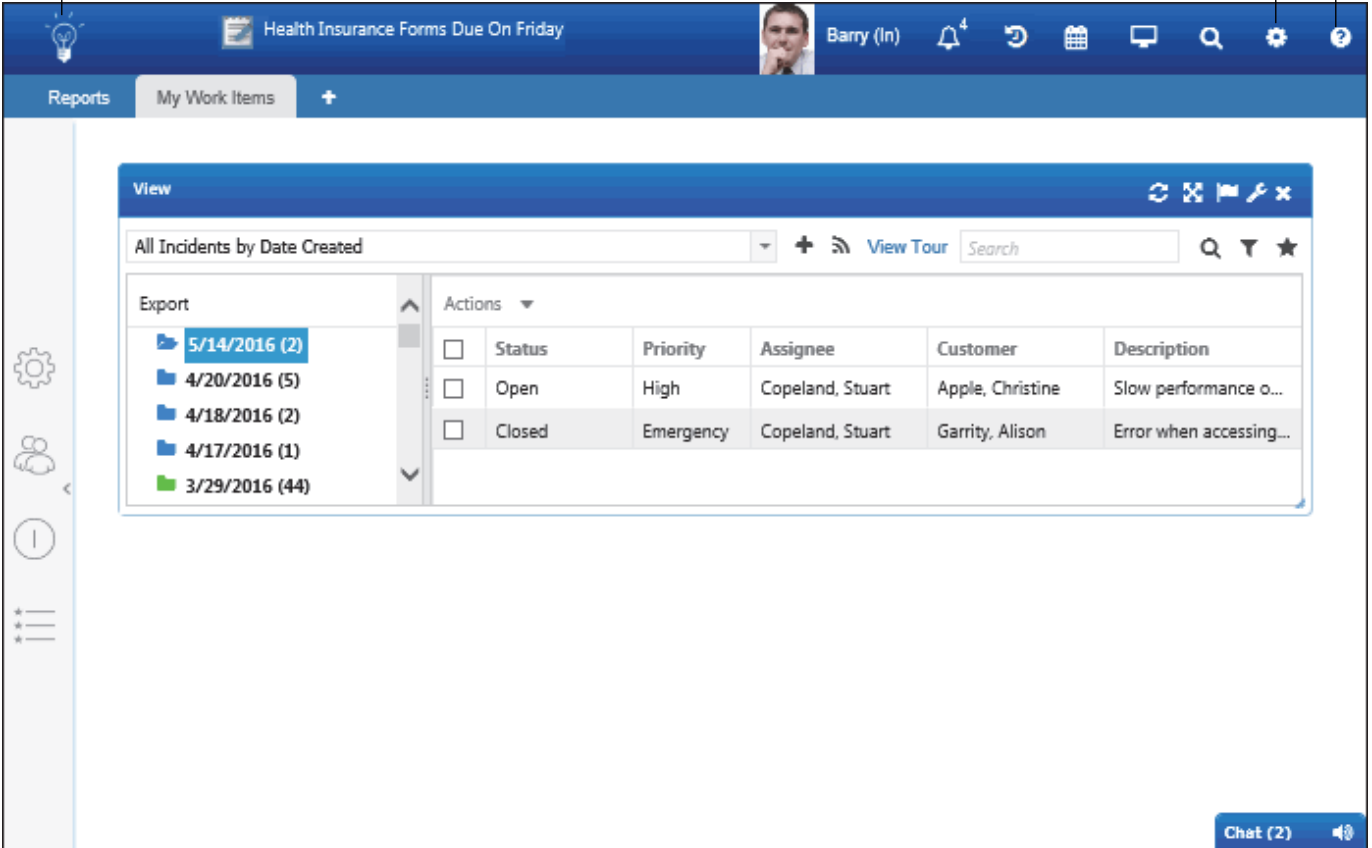
iSupport® helps you to perform functions such as creating and managing incidents, entering and searching for knowledge entries and FAQs, tracking assets, customers, and companies, sending surveys, and generating reports. Administrators can enable and configure all of the features in the application. Administrators and support representatives can use the Desktop to access all iSupport functionality. Customers can use mySupport® portals to submit and view incidents and changes, view problems and known errors, search for knowledge entries, and view headlines and FAQs. If you have the Service Desk edition, you can additionally create and manage problems, changes, and purchase requests.

Use the Desktop to access all iSupport functionality. It is the customizable framework on which you will create dashboards and add components for views, reports, news feeds, charts, and more. The iSupport Desktop appears after the iSupport Setup Utility; use the **Configuration** option to enable additional features and fully configure iSupport. Use the Help option on the Desktop to access the online help.

Create work items

Access configuration options

Access comprehensive online help system



The screenshot shows the iSupport Desktop interface. The top navigation bar includes a lightbulb icon (labeled 'Create work items'), a notification for 'Health Insurance Forms Due On Friday', a user profile for 'Barry (In)', and several utility icons. The main content area displays a 'View' window titled 'All Incidents by Date Created'. This window contains a list of incidents grouped by date, with '5/14/2016 (2)' selected. To the right of the list is a table with incident details.

Status	Priority	Assignee	Customer	Description
Open	High	Copeland, Stuart	Apple, Christine	Slow performance o...
Closed	Emergency	Copeland, Stuart	Garrity, Alison	Error when accessing...

At the bottom right of the interface is a 'Chat (2)' button.

Start with the following options in the Configuration module (accessed via the Configuration icon on the Desktop) for a base configuration of iSupport. Be sure to access the online help if you're unsure of a setting.

Core Settings

Use the Core Settings section to configure the standard features you'll use and set up groups and profiles for those using iSupport.

-  Start with the **Global Settings screen** to set options that affect the entire application.
 -  Use the **Feature Basics screen** to enable and set options for the features applicable to your company. Note that you can enable features later if needed. Keep in mind the types of issues and assets that you need to track, and what data is important to you.
 -  Set up your users. Use the **Groups screen** to set up groups for routing, reporting, and restricting access to iSupport functionality if applicable. Then use the Support Representative Profile screen to set access and options for individuals using iSupport.
- Note that if you already have support representative, customer, and asset information in an LDAP-enabled directory server such as a Microsoft Active Directory or SQL database, you'll be able to later use the **Data Source Integration feature** to synchronize with it, but you'll first need to ensure that iSupport is set up to receive all of the information you want from your current data sources.
-  Configure **email functionality**: default outbound email settings, email accounts for email processing, and design templates.
 -  **mySupport portals** enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more. iSupport includes a default mySupport portal that you can customize, or you can create more portals if applicable.

Customize

Use the options in the Customize section to add fields and other options that track information application to your company.

-  Use the **Categories screen** to configure custom values for describing work items. An important feature in iSupport, categories are used with knowledge searches, routing, and more. You can associate custom fields and other features for tracking additional information when a category is used.
-  Use the **Custom Fields screen** to add fields to key record types. You can use reference iSupport entry screens (via the Desktop Create menu) to see what is already tracked by default.
-  Use the **Custom Status Labels screen** to create labels applicable to your company for iSupport's work item status levels.
-  iSupport includes default layouts for the entry screens used by support representatives and the display/submit screens used by customers on the mySupport portal. Use the **Layouts screen** to modify these layouts with fields and tabs that are specific to your company.

Integrate

Use the options in the Integrate section to utilize third party applications.

-  Use the **Data Source Integration screen** to utilize Active Directory or other LDAP directory servers as a source for iSupport's asset, customer, and support representative information.

Automate

Use the options in the Automate section to implement features that will make your workflows more efficient.

-  Use the **Rules screen** to create condition-based rules to automatically send notifications, route, initiate approval workflows, change work item fields, and more iSupport includes some basic rules by default which you can change or delete if needed.

-  Rules must be included in rule groups; use the **Rule Groups screen** to create rule groups and include rules. Rule groups are applied to incidents through customers, companies, category combinations, templates, and hierarchy templates. If rule conditions are met, its actions are performed on the incident.

Additional Features in Core Settings

Administration

-  Use iSupport's administration tools for monitoring, and maintaining iSupport data and functions. You can also implement security for support representative and customer logins.
-  The **License Management screen** includes a Deactivate License button; you'll need to deactivate your license before any maintenance updates or changes to the hardware profile and server are made.