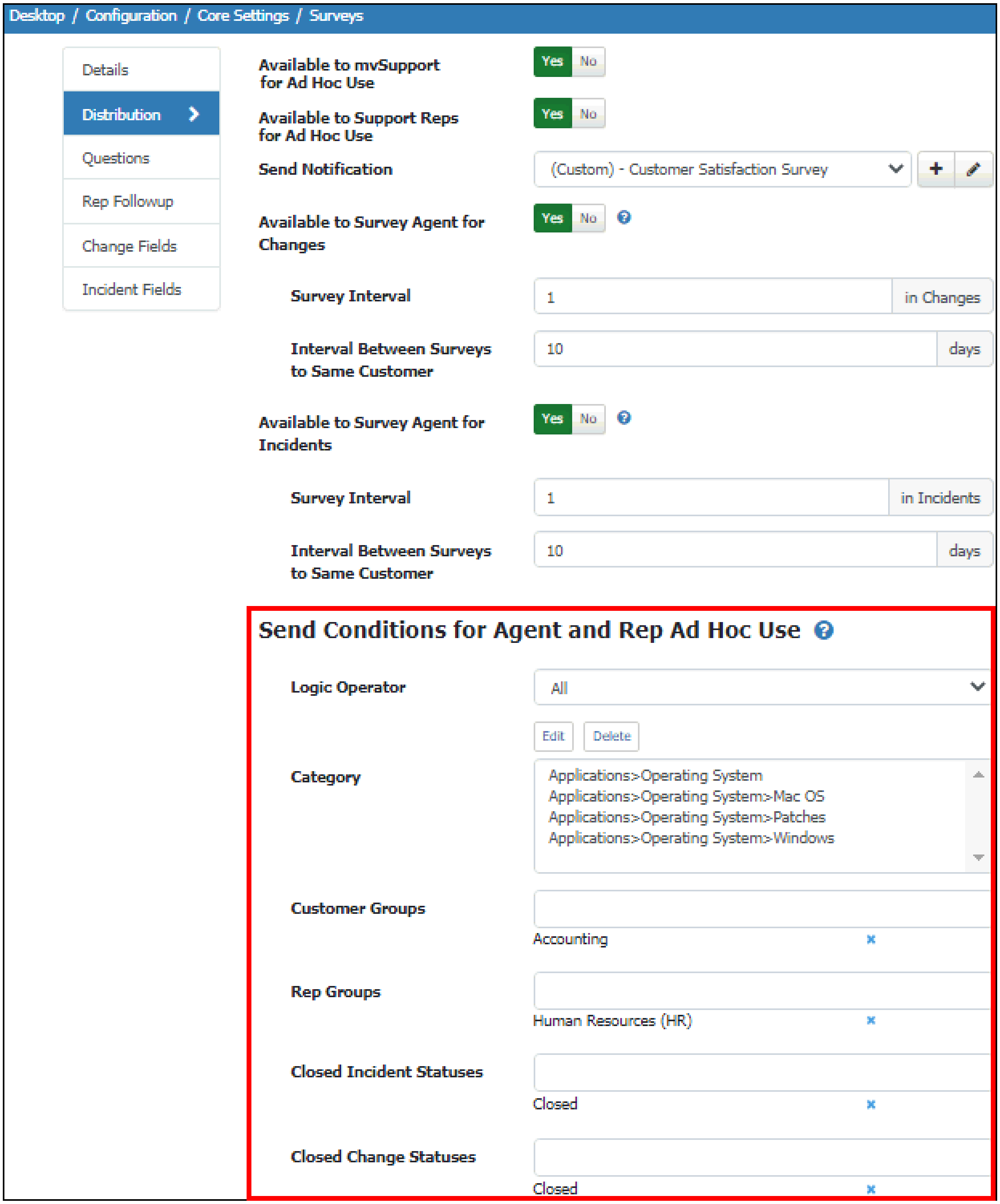
iSupport® 17.5 Release Notes

This document includes new features, changes, and fixes in iSupport v17.5. The Readme.txt file included with the download includes a list of known issues.

General Configuration

Survey Distribution Send Conditions

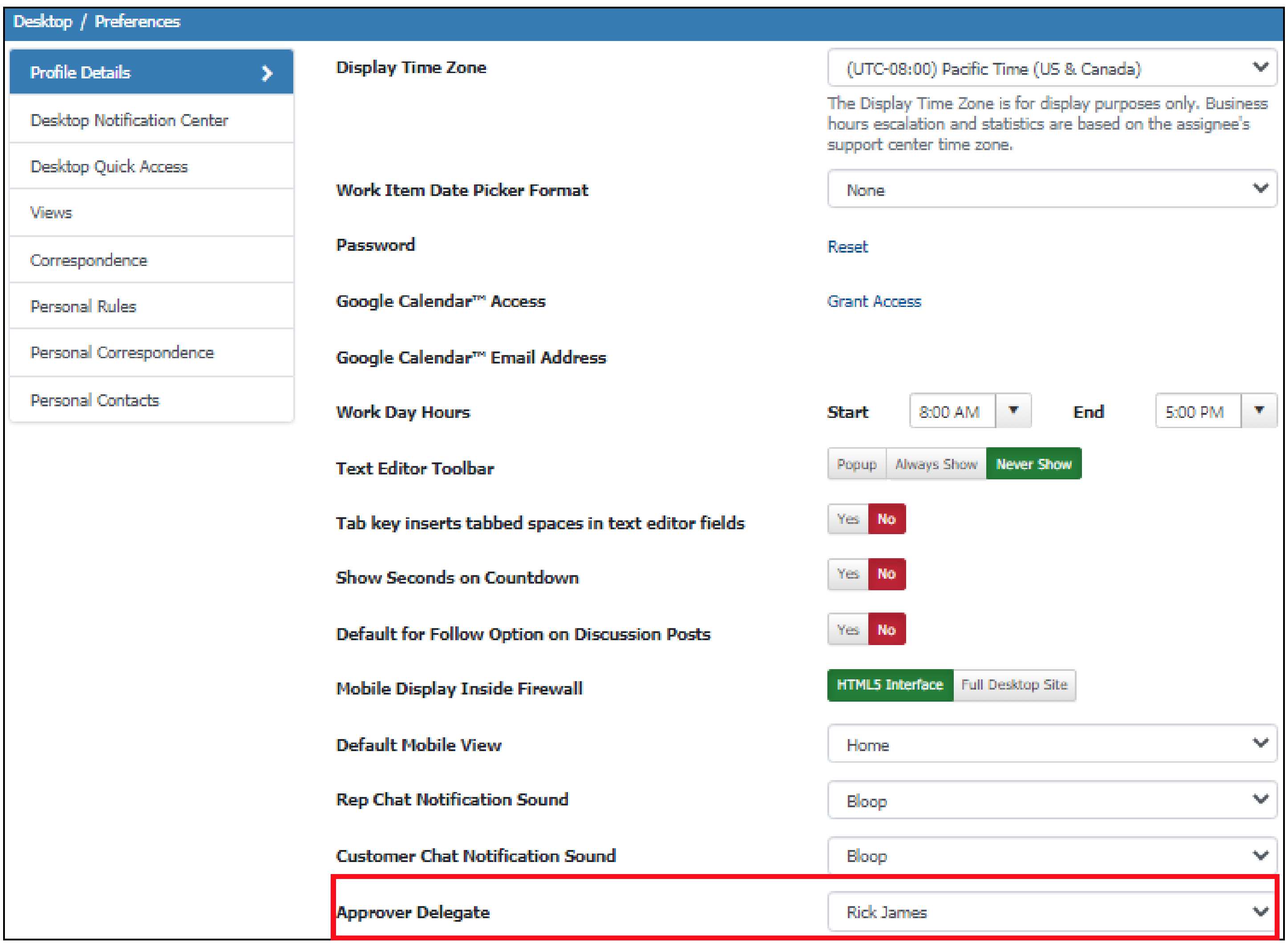
You can now use customer groups, closed incident statuses, and closed change statuses as conditions for sending surveys. Use the Logic Operator field to execute all selected conditions or any of your selected conditions. Send conditions must be met in order for the agent to send a survey and for the survey to be included in the list of available surveys for ad hoc use. The conditions do not apply when sending a survey via the Desktop View component Actions menu.



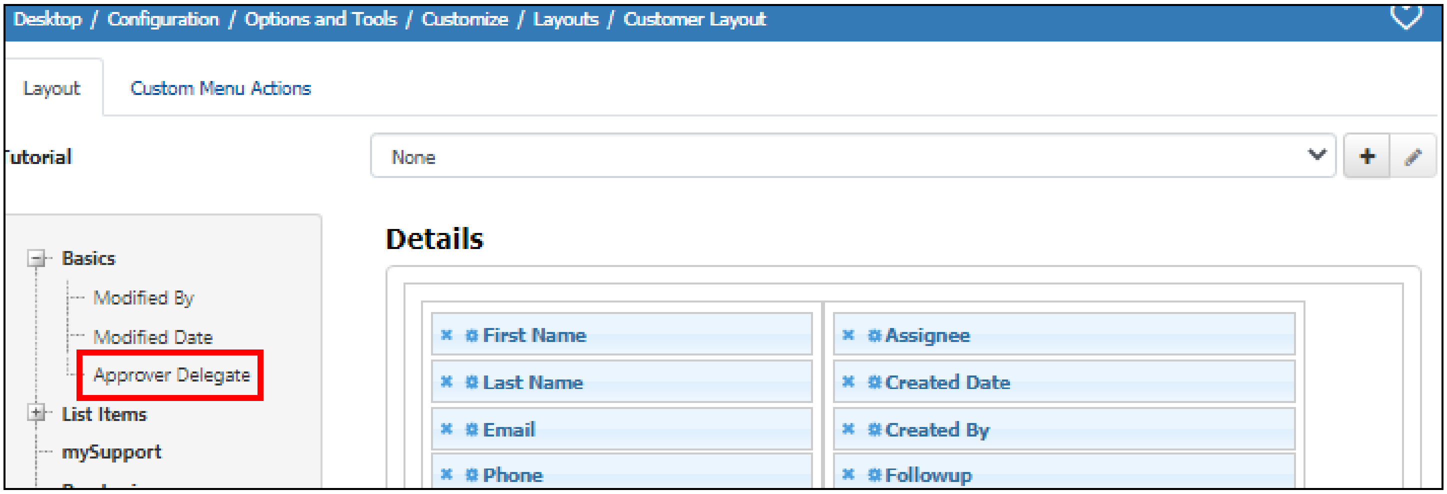
Approver Delegates For Support Representatives and Customers

Use the Approver Delegate feature to designate a support representative or customer that can specify a verdict on work items pending approval for another support representative or customer. An approver delegate can be set for a support representative via the Approver Delegate field on the Advanced tab in the Support Representative Profile screen.

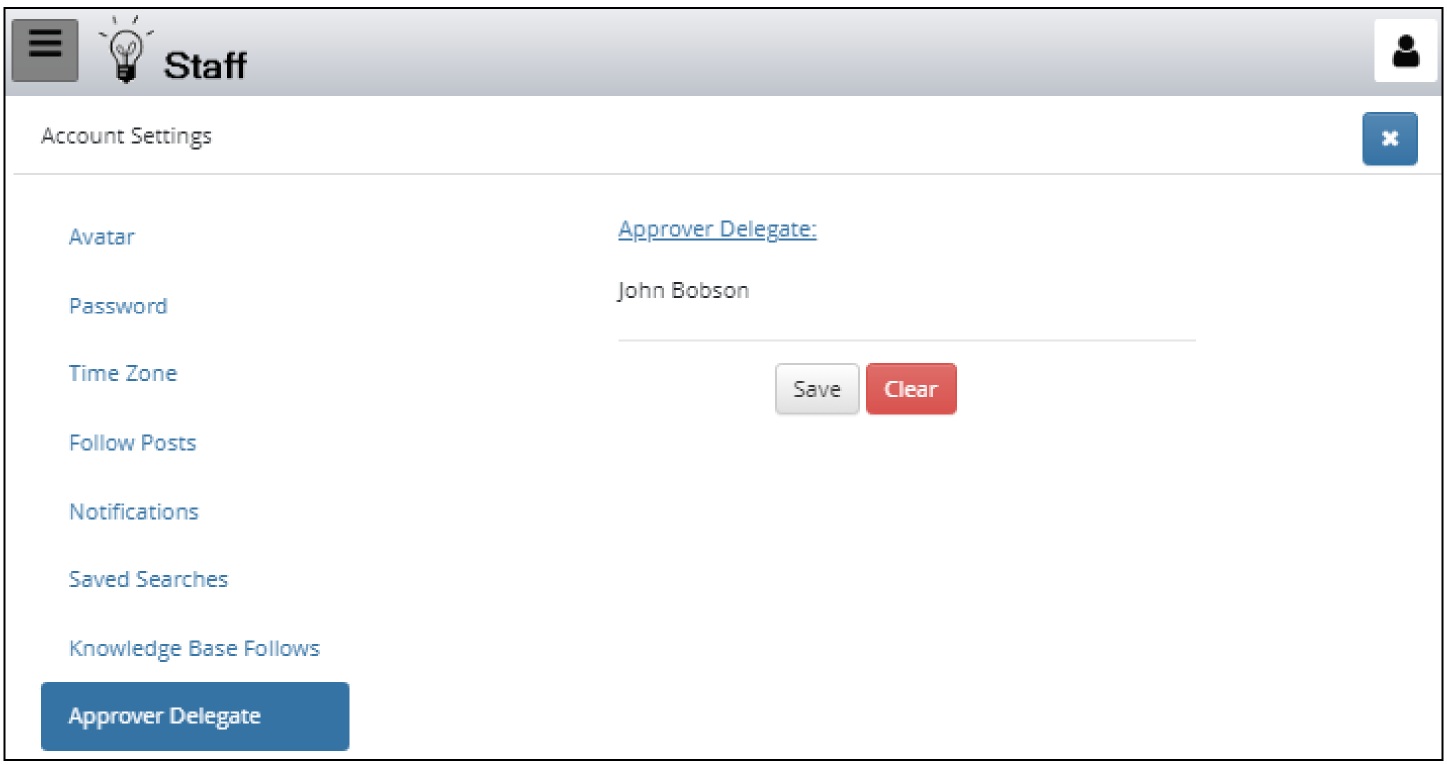
A support representative can set their approver delegate via the Profile Details tab in the Desktop Preferences screen.



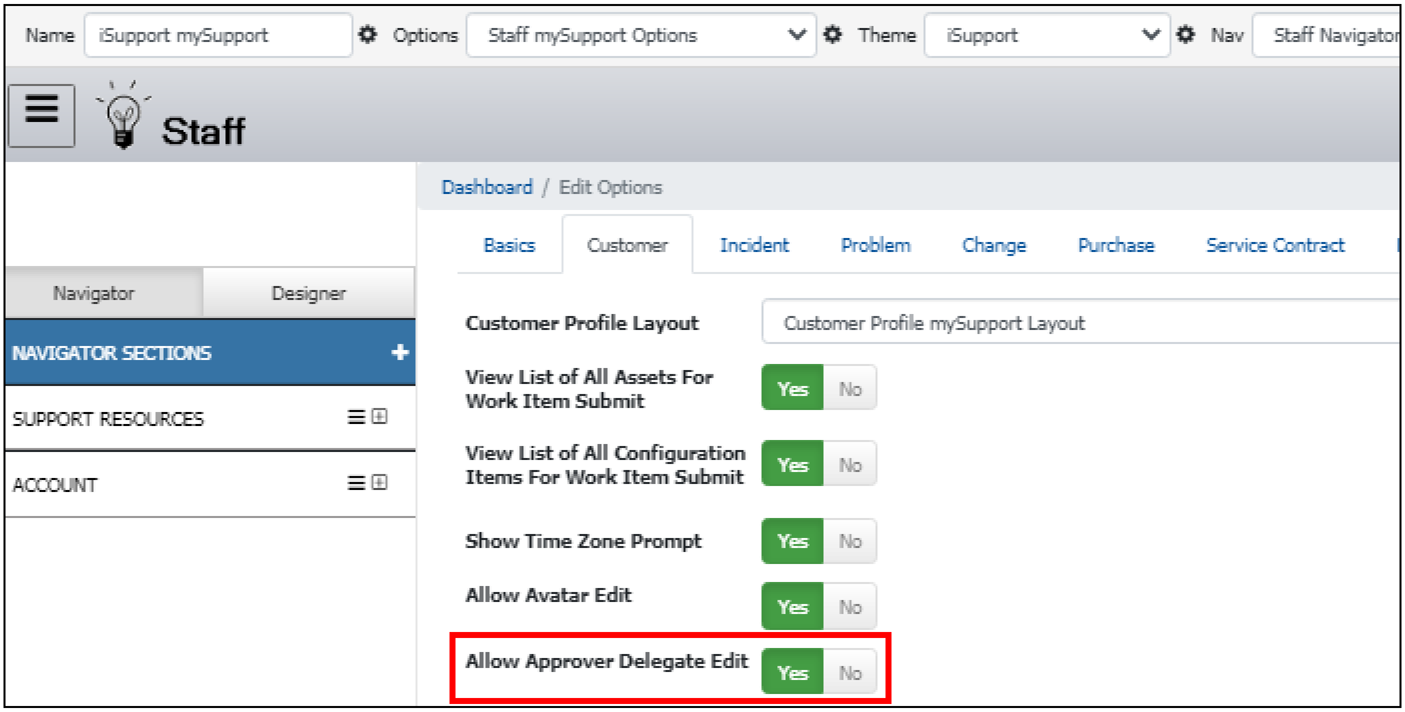
An approver delegate can be set for a customer by adding the Approver Delegate field to a Customer Profile layout.



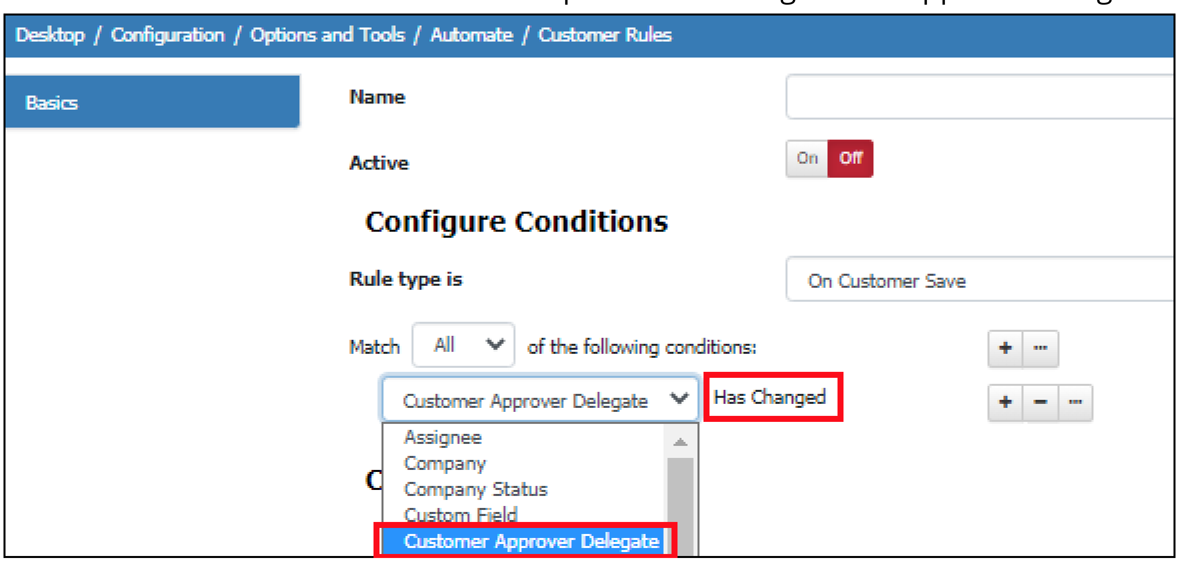
A customer can set their own approver delegate via the mySupport Account Settings screen.



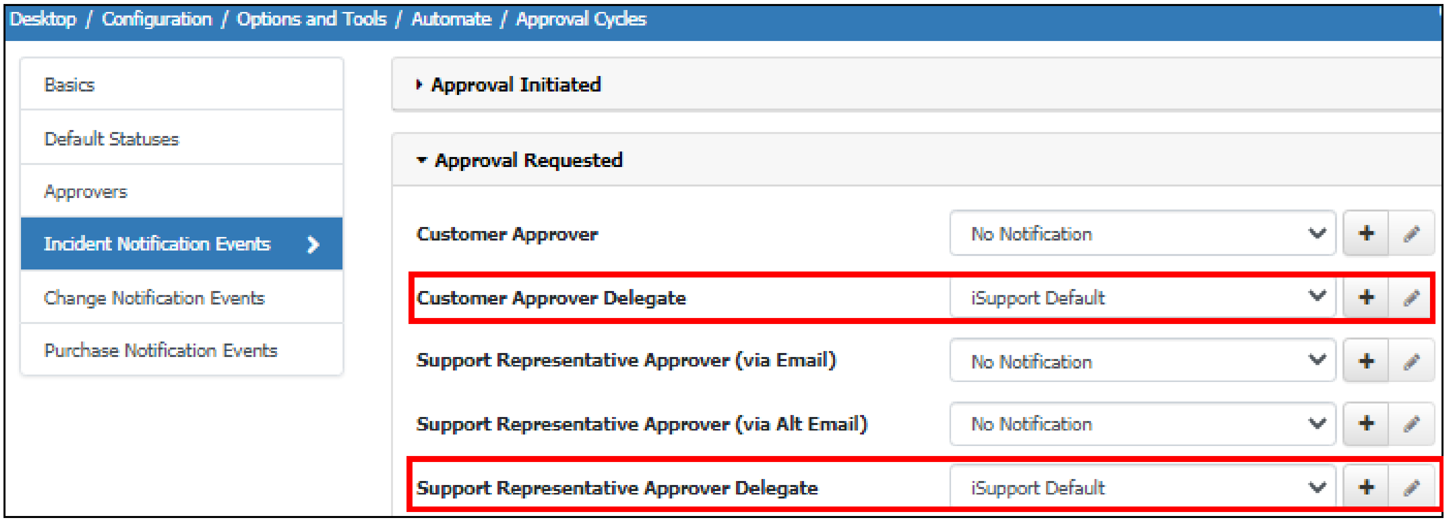
Enable the Approver Delegate setting shown above via the Allow Approver Delegate Edit field on the Customer tab in the mySupport Options configuration screen.



A Customer Approver Delegate | Has Changed condition has been added to Customer Rules for initiating actions such as notifications that can be sent in response to a change in the approver delegate.



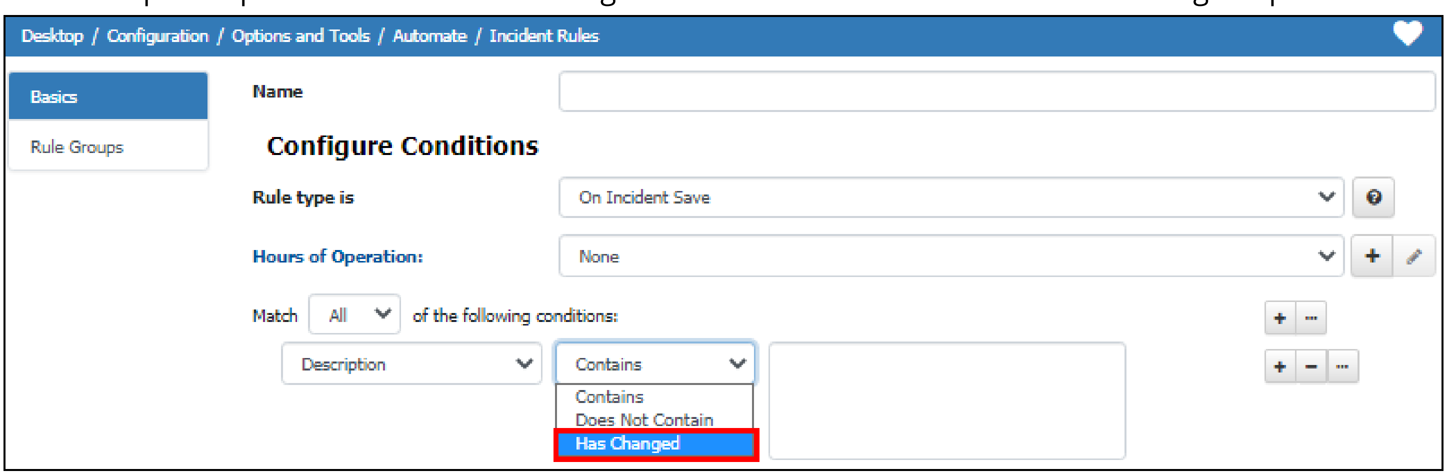
Notifications can be configured to be sent to approver delegate recipients via the Notification Events tabs in the Approval Cycles configuration screen.



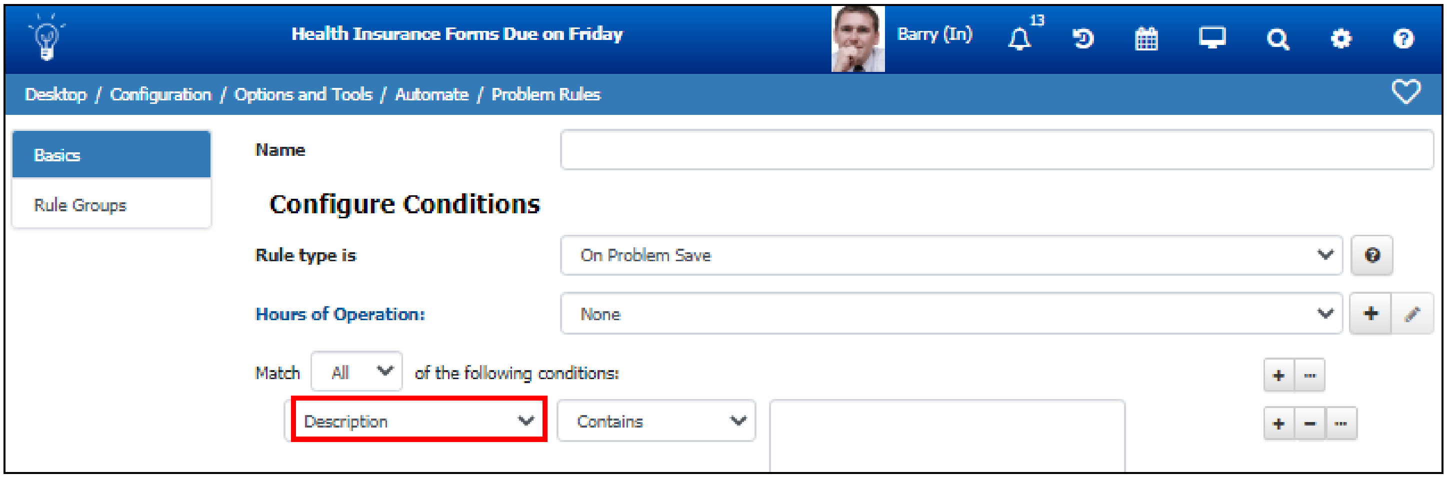
After the approval, notations in the work item History field will reflect the action.

Condition Options For Incident, Change, and Problem Rules

The Description option in Incident and Change rule conditions now includes a Has Changed operator.

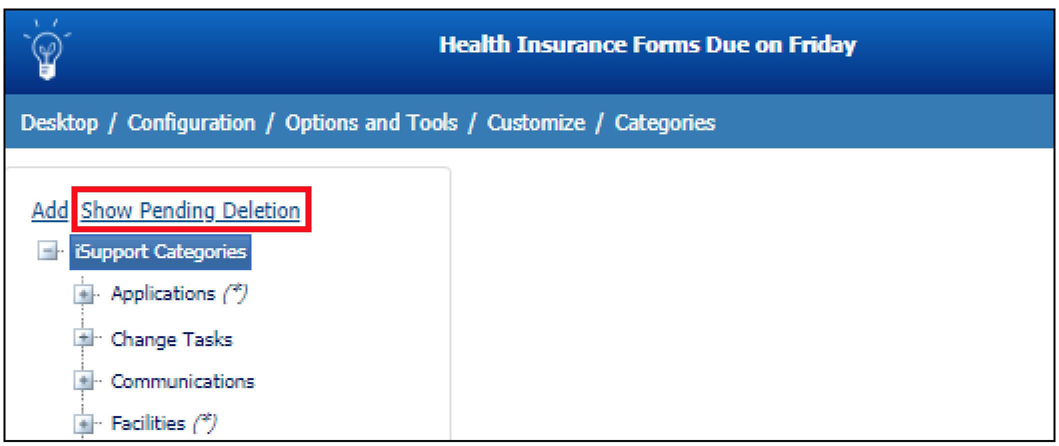


Problem rules now have Description as a condition option.

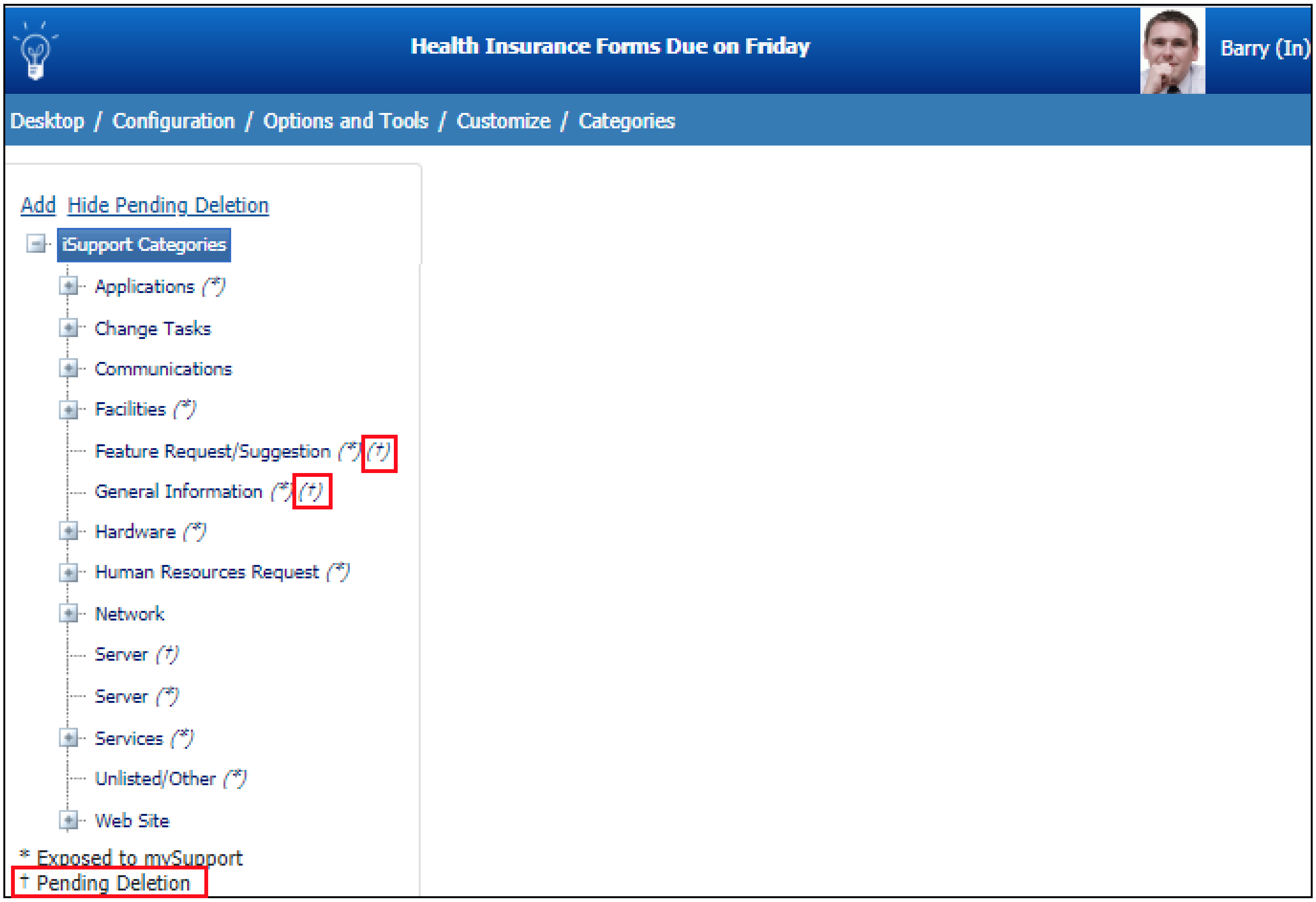


Pending Deletion Display for Configuration Records

A Show Pending Deletion link now appears in the Category, Asset Type, CMDB Type, Survey, Support Representative Profile, Custom Change Type, Approval Cycle, and Impact and Urgency Mapping screens to display records that have been deleted by an iSupport user but are retained in the system because of references to other records (incidents, correspondence, etc.) The Database Maintenance agent ultimately removes these records.



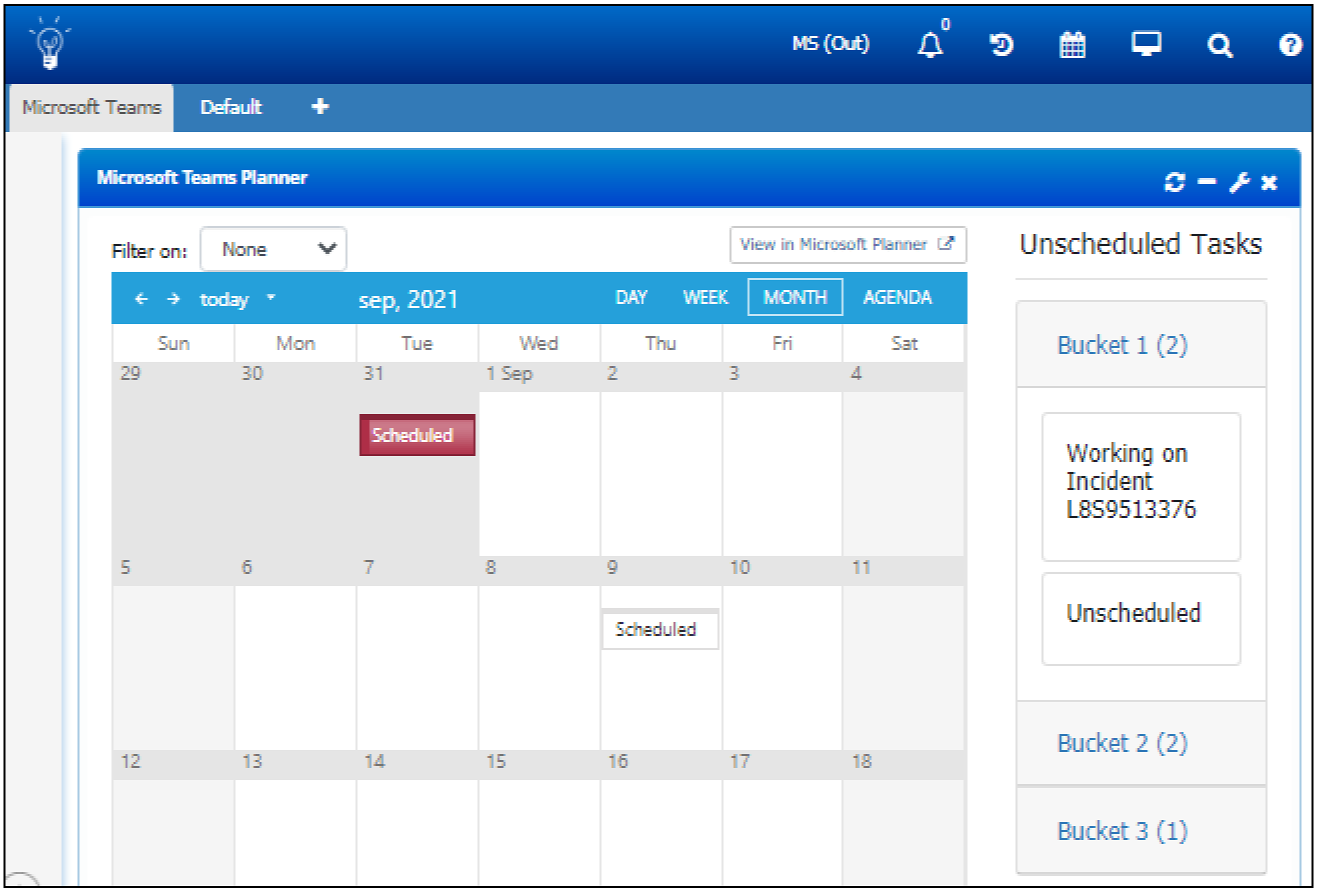
When the Show Pending Deletion link is selected, records that are pending deletion will display with a cross symbol.



Desktop Components

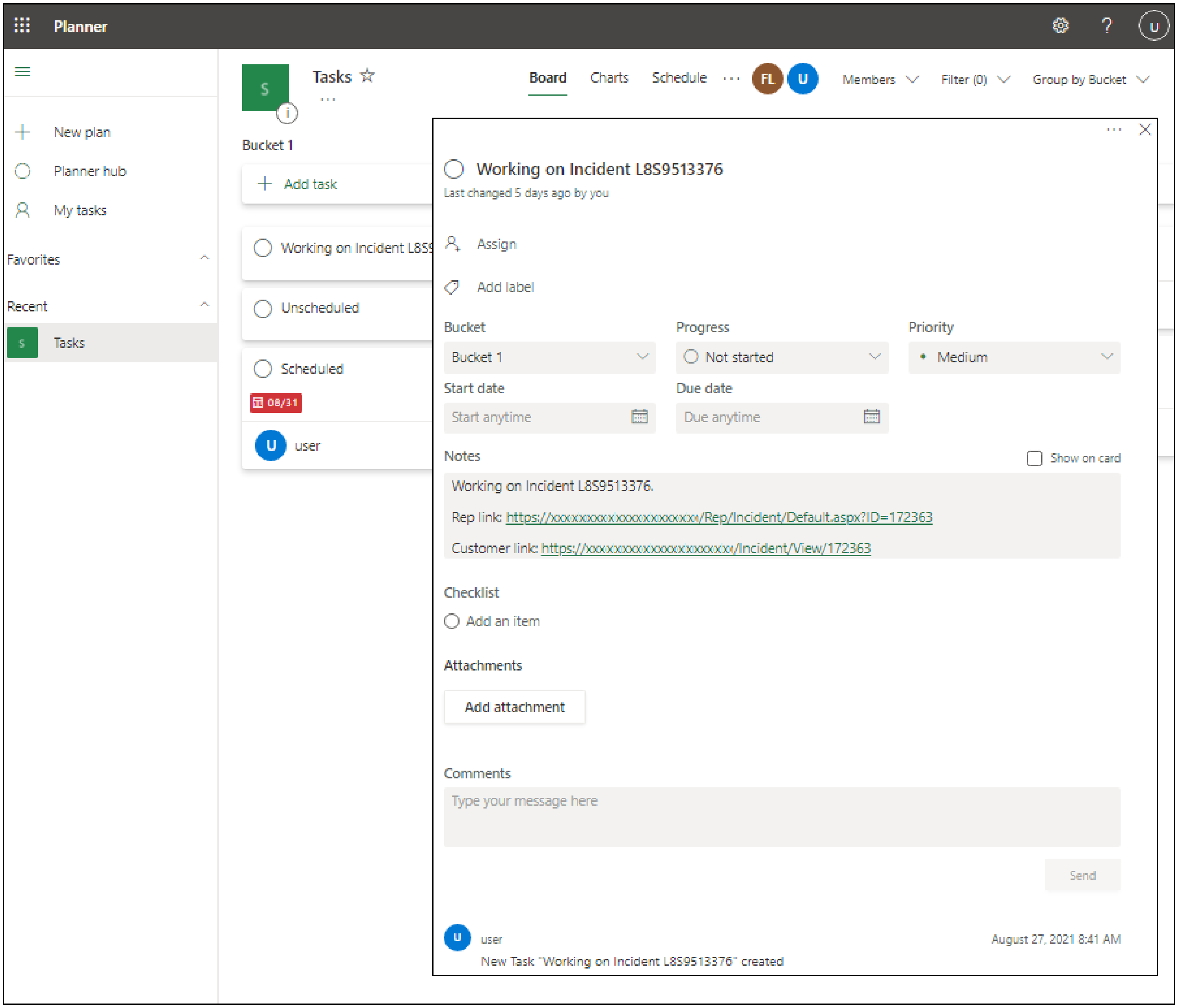
Microsoft Teams Planner Component For iSupport Desktop

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 Planner tasks.

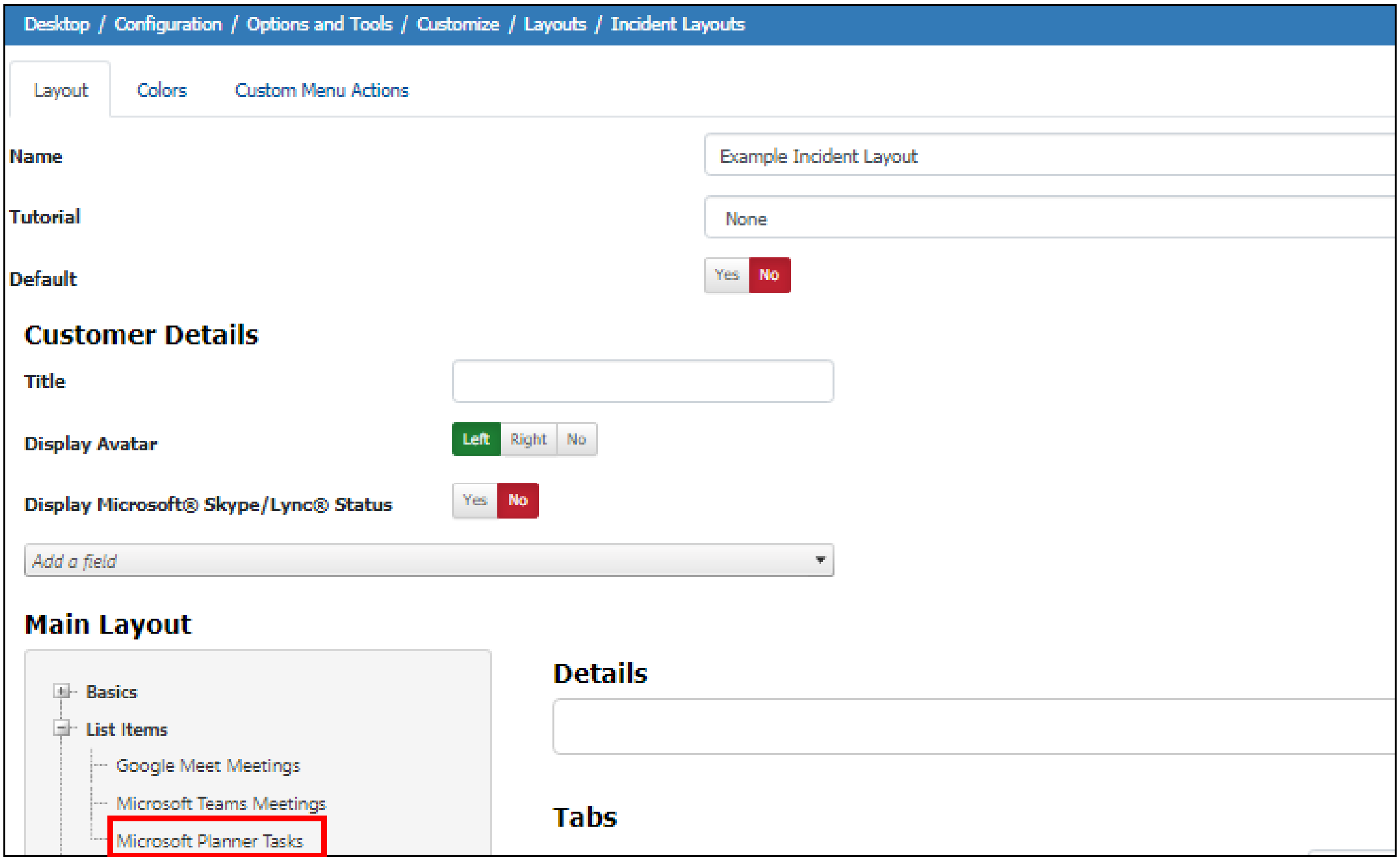


Note that if you have an existing configuration of Microsoft 365 Teams, you will need to break that pairing and rejoin using the master account so it can gather the new required permission. This is done via the Clear Master User Access button in the Master User field on the Microsoft 365 tab in the Options and Tools | Integrate | Microsoft Integration screen.

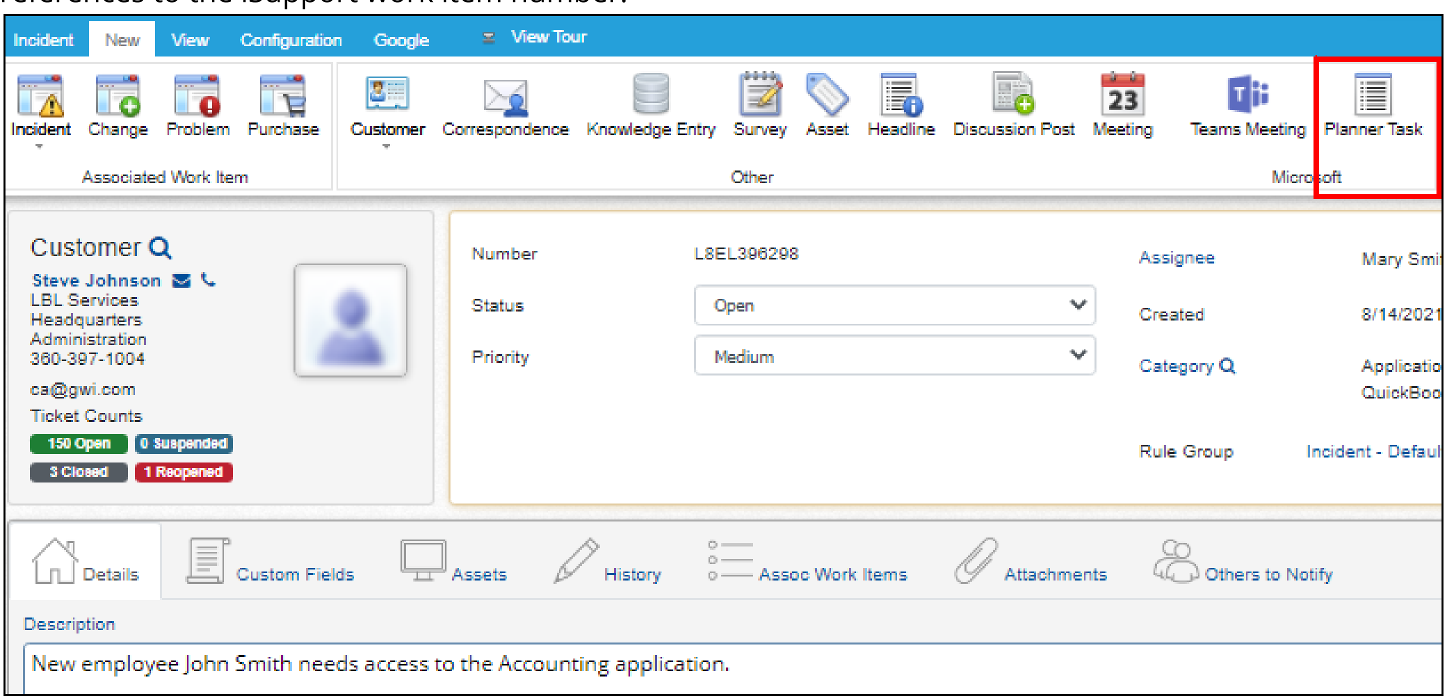
Select an item in the task list to display it in the Planner app.



You can display a list of meetings by adding the Microsoft Planner list field to work item layouts via the Options and Tools | Customize | Layouts screen.

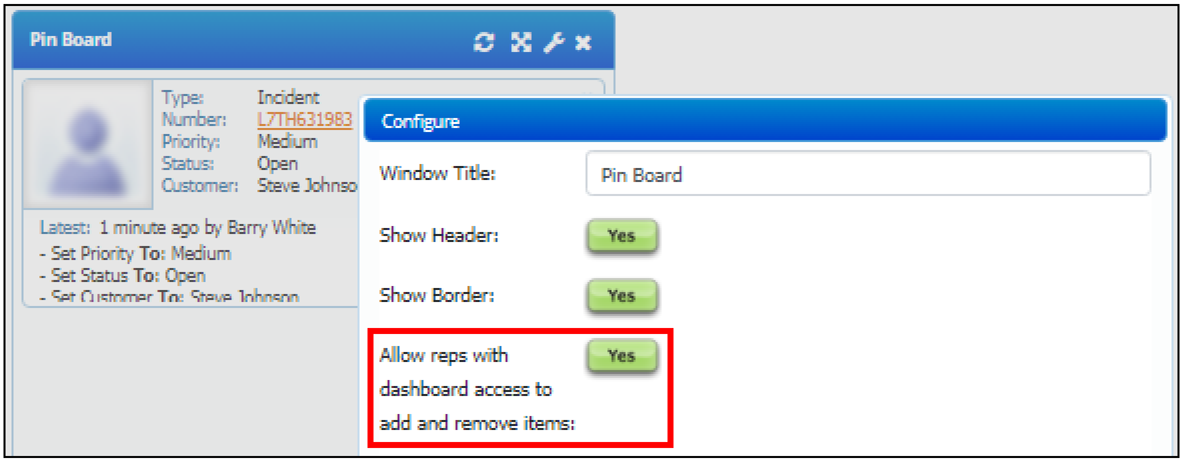


In a work item screen, you can use the Planner Task icon to create Planner tasks with prefilled references to the iSupport work item number.



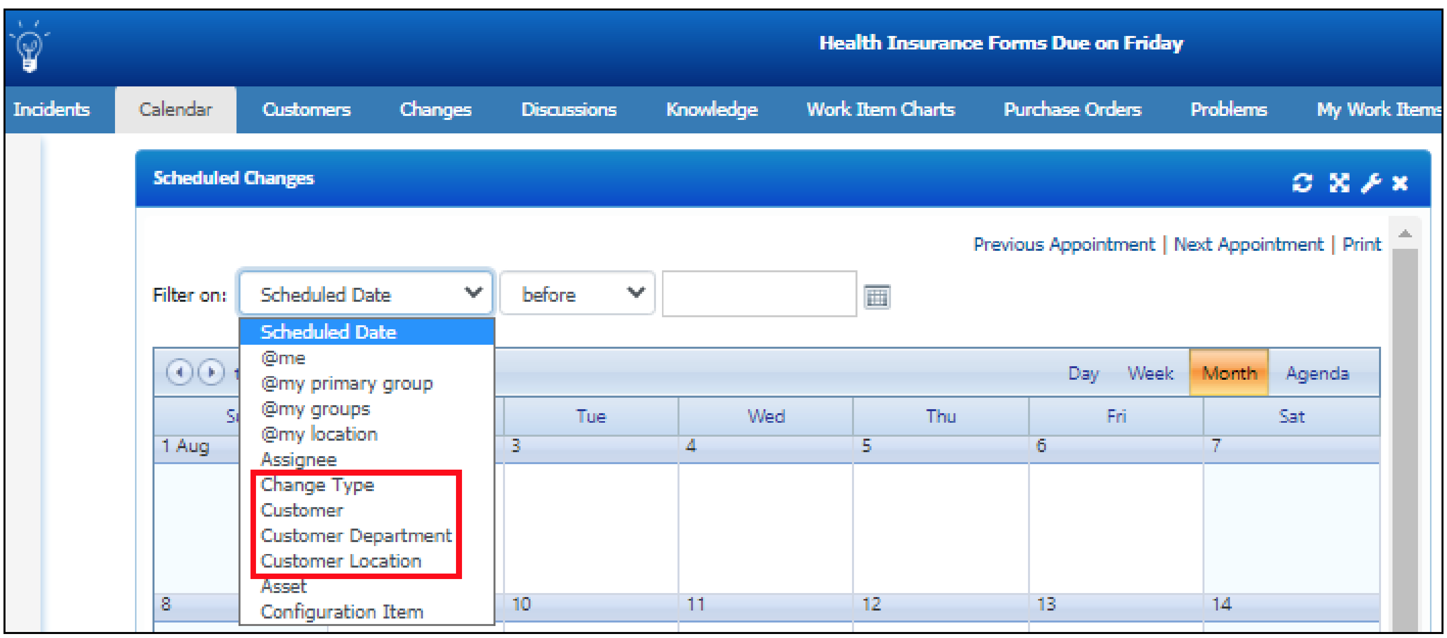
Setting To Allow Editing On Pin Boards

An Allow Reps With Dashboard Access To Add and Remove Items field was added to 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.



Type, Customer, Department, Location Filtering For Scheduled Change Calendar

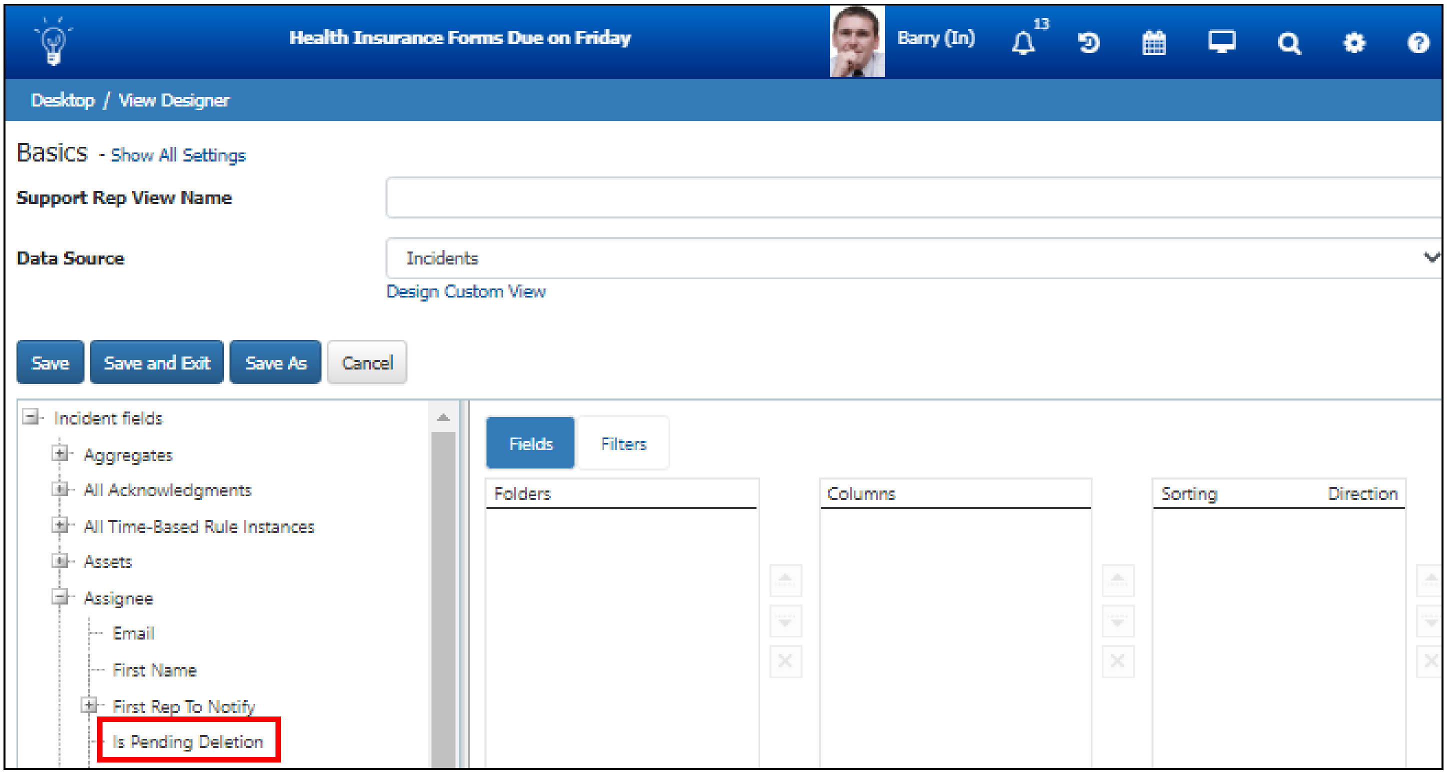
Support representatives can now filter on Change Type, Customer Department, Customer, and Customer Location in the Scheduled Change Calendar component.



Desktop Views

Pending Deletion True/False Field Added To Work Item View Designer Data Sources

An Is Pending Deletion field has been added to the Assignee, Author, and Closed By sections in work item View Designer data sources for filtering.



Classic View Design Removed; Upgrade Will Change Those On Classic to Newer Interface

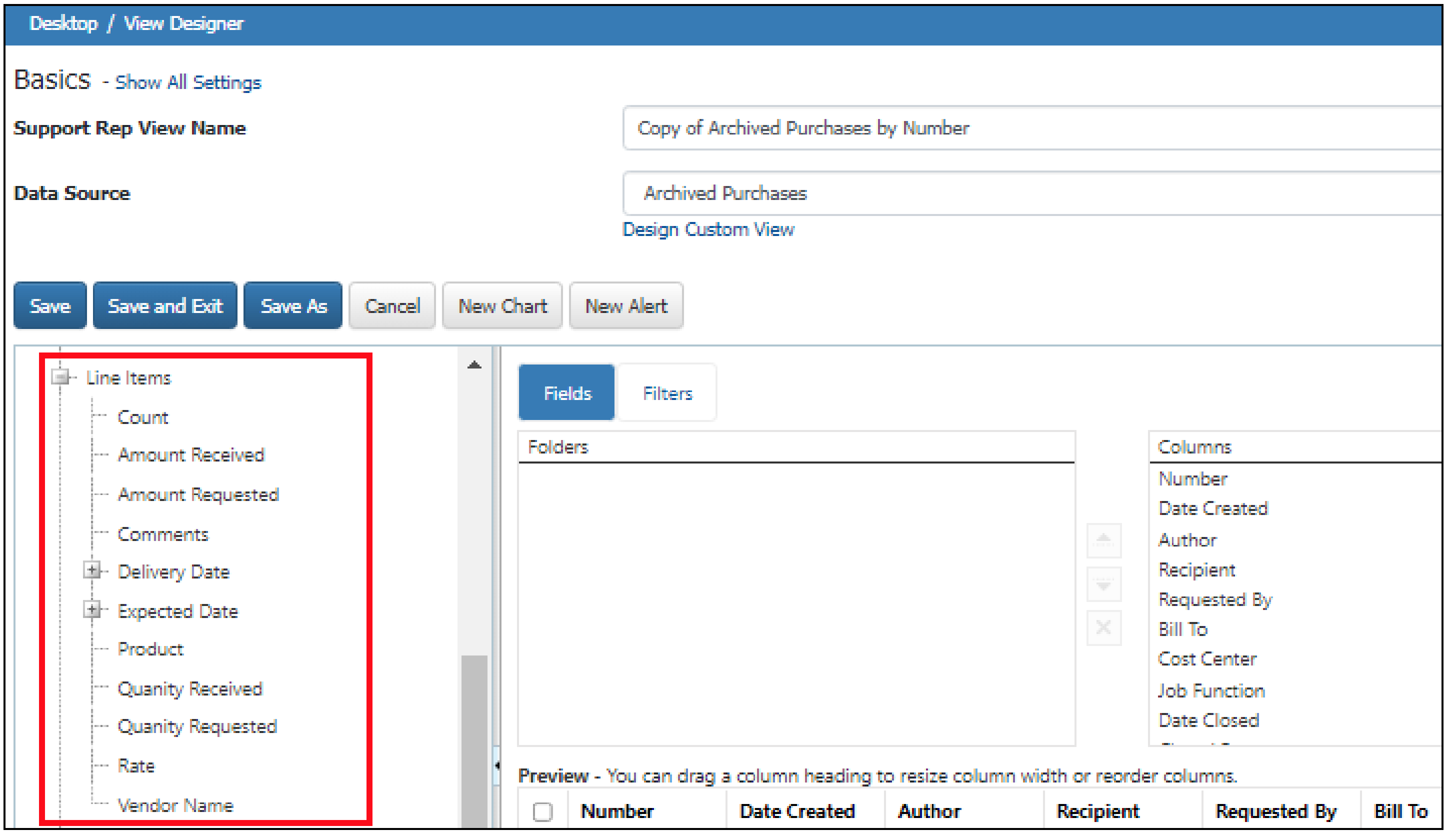
The classic view interface from versions prior to iSupport 15.0.4 has been removed from iSupport, and the setting for selecting to use the classic view design is no longer included on the Views tab in the Desktop Preferences screen.

iSupport Default Views Can Now Be Renamed

You can now rename iSupport's default Desktop and mySupport portal views.

Line Items Added to Archived Purchases View Data Source

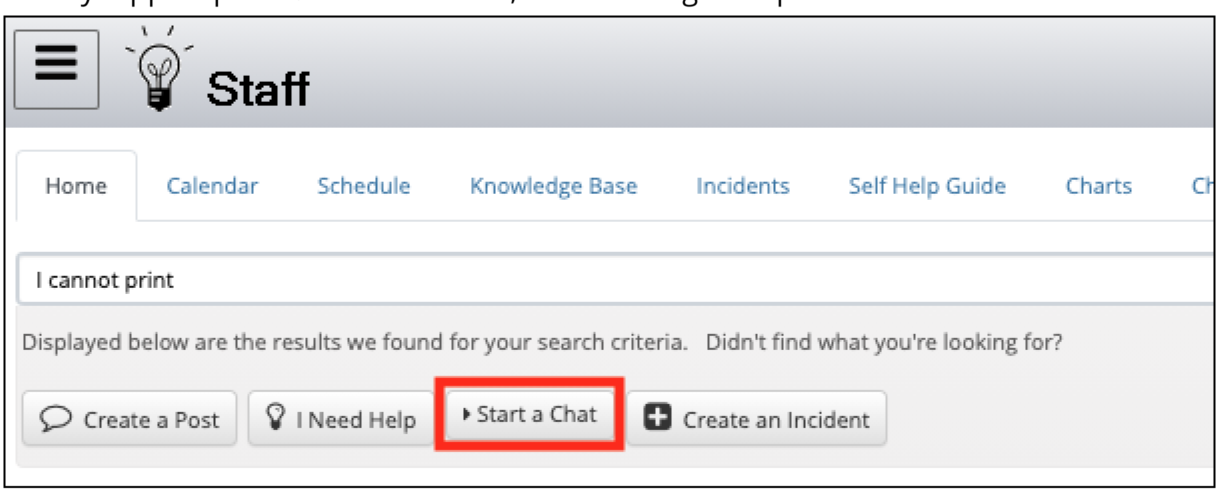
The Archived Purchases view data source now includes Line Items detail fields.



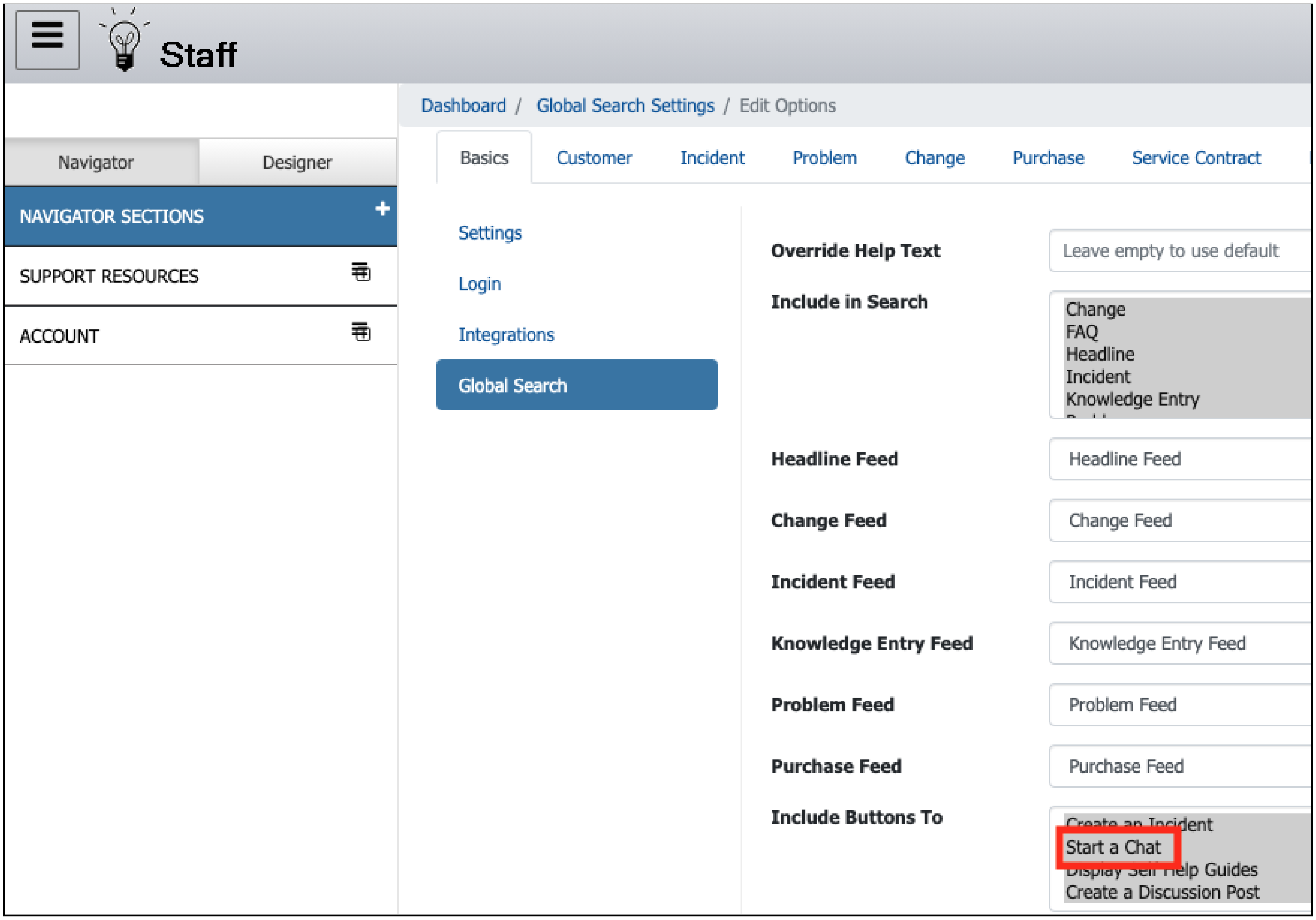
mySupport

Start a Chat Option Added To mySupport Global Search

A Start a Chat button has been added to the button options that can appear under the Global Search option on a mySupport portal. When selected, a chat dialog will open with the contents of the search.

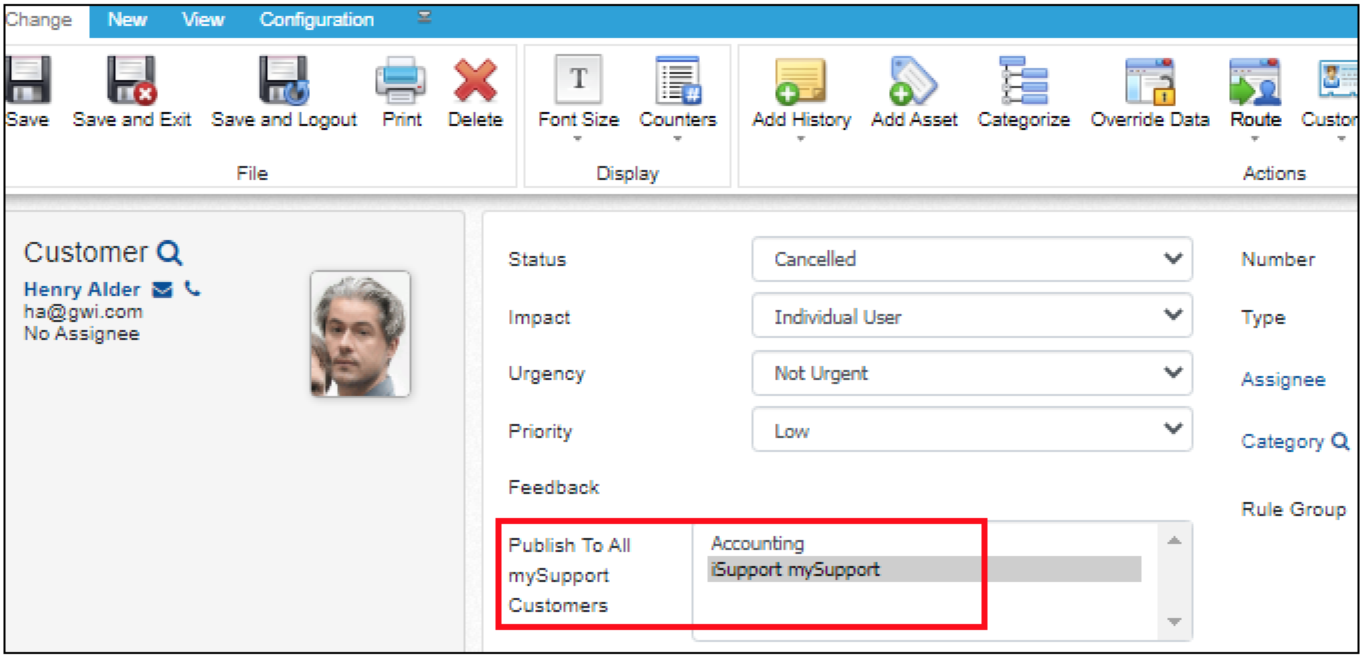


Select this option in the Include Buttons To field on the Basics | Global Search tab mySupport Portal Options configuration screen.



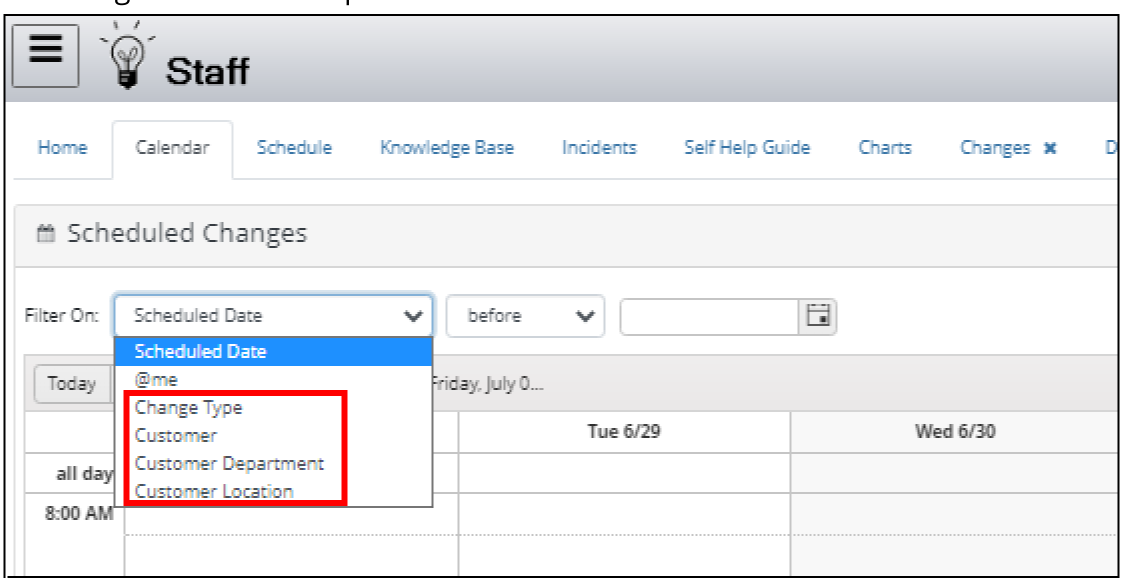
Publish to mySupport From Change

The Publish to All mySupport Customers option now enables selection of specified mySupport portals (similar to how it works on FAQs and headlines).



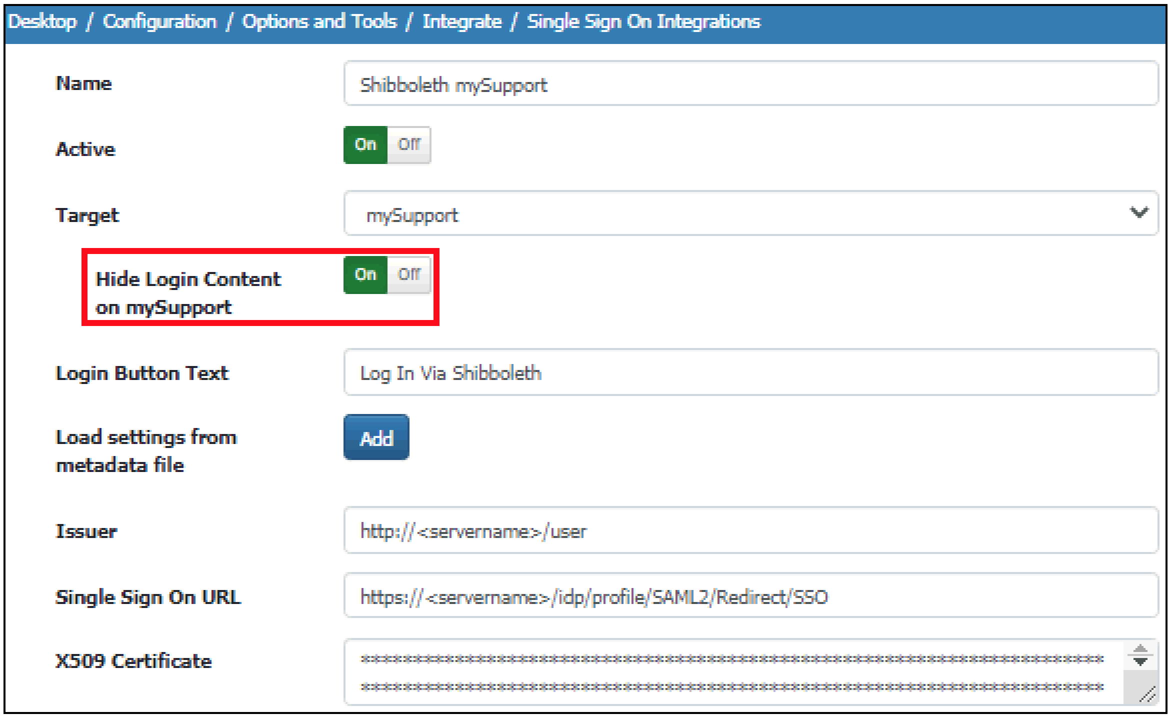
Type, Customer, Department, Location Filtering For Scheduled Change Calendar

Customers can now filter on Change Type, Customer Department, Customer, and Customer Location on the Scheduled Change Calendar component.



Setting Added To Hide Default Login Button For SSO Integration

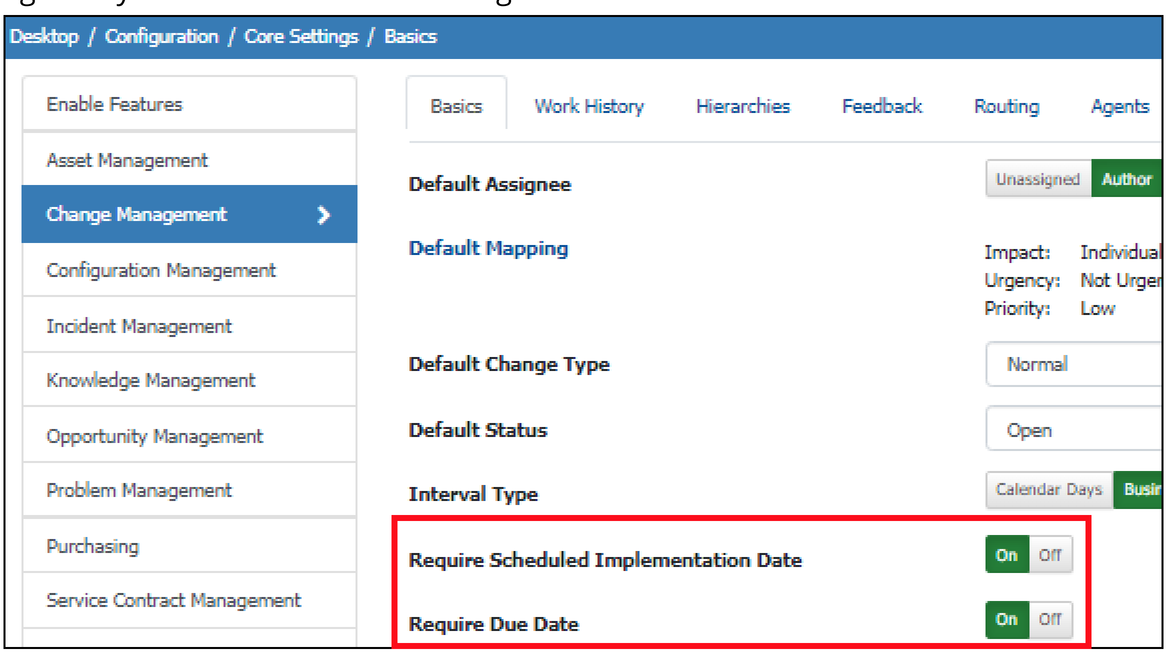
You can now use the Hide Login Content on mySupport field in the Options and Tools | Integrate | Single Sign On Integrations configuration screen to display or hide the default Login button on mySupport.



Work Items

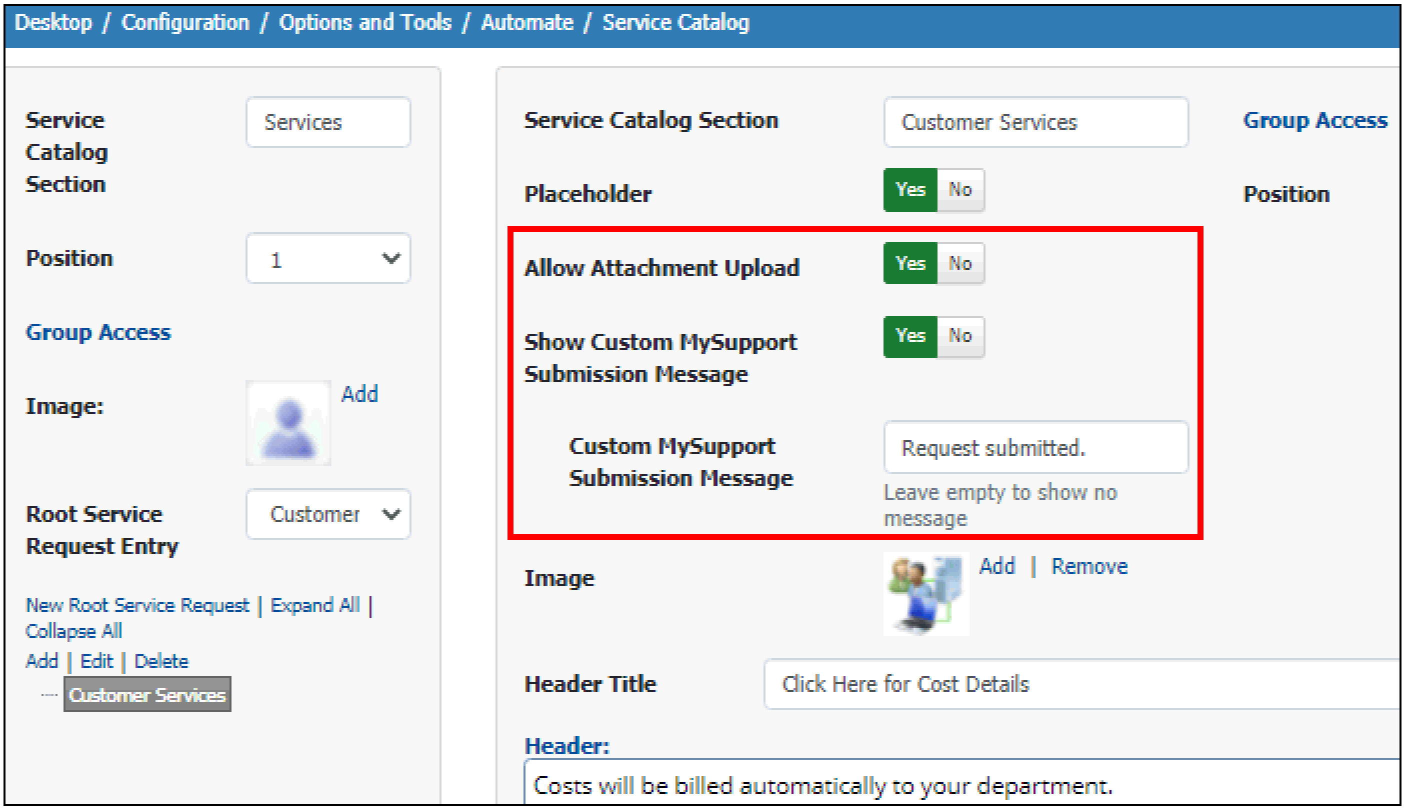
Setting To Require Scheduled Implementation and Due Date For Changes

Use the Required Scheduled Implementation Date and Require Due Date settings in the Change Management | Basics tab in Feature Basics configuration screen to require those fields to be completed in the Change entry screen in order for a Change record to be saved.

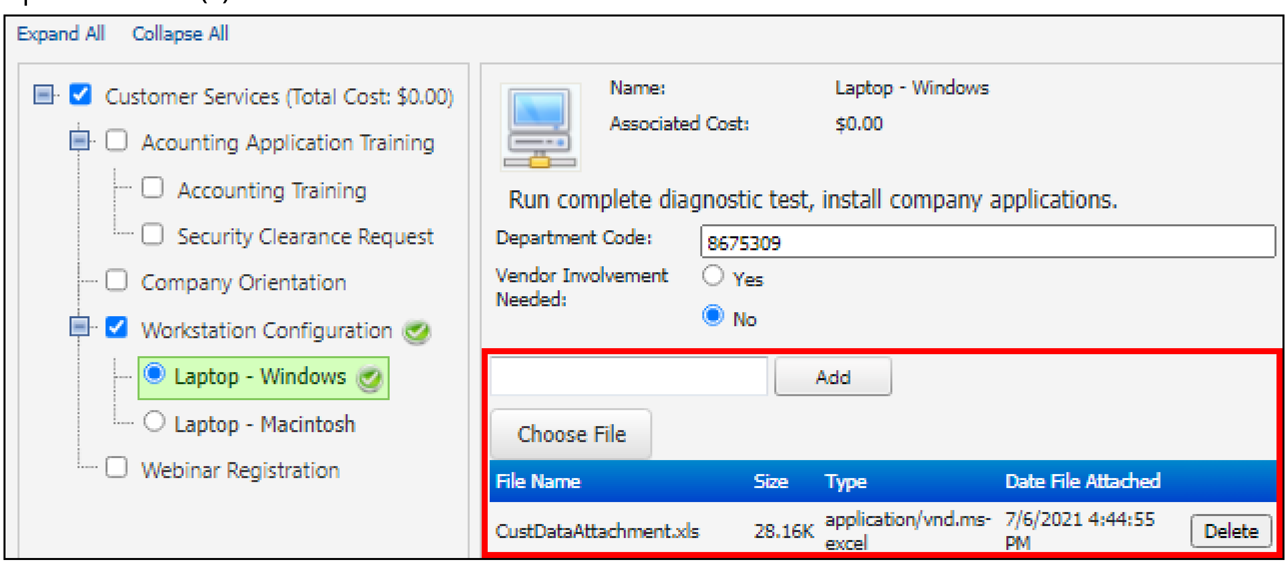


Attachment Field Control and Custom Submission Messages for Service Catalogs

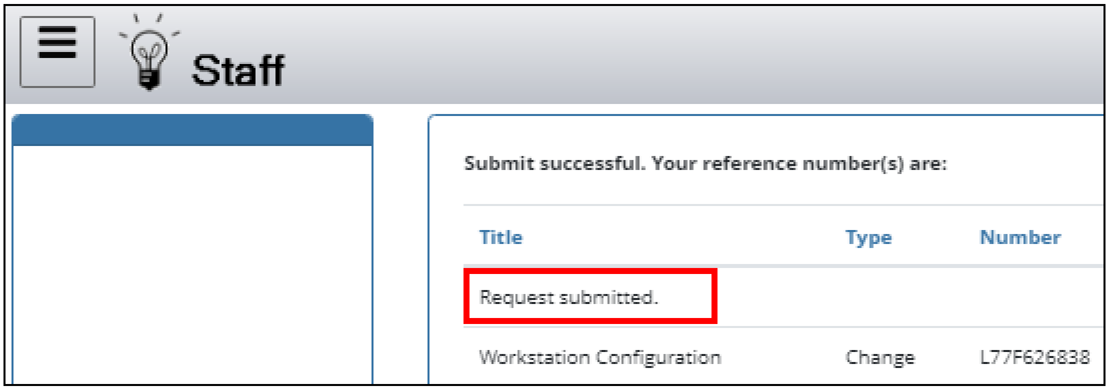
Two new fields have been added to the Service Catalog configuration screen.



- Use the Allow Attachment Upload field to enable or disable display of a field to attach a file to a request. If No is set in the Allow Attachment Upload field, the field would only display if the configured template had file(s) attached.



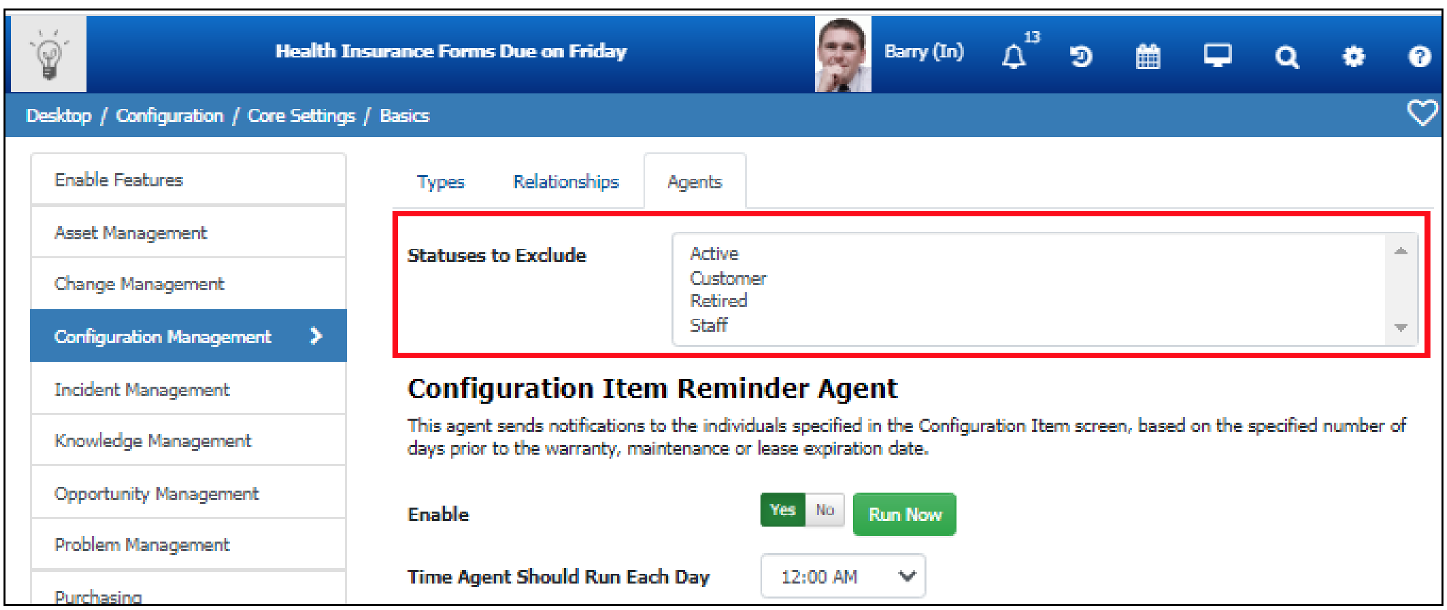
- Use the Show Custom mySupport Submission Message field to display text that will appear after a request has been submitted.



You can select Yes in the Show Custom mySupport Submission Message and then leave the Custom mySupport Submission Message blank if you do not want the customer to see the template node in the post-submission work item list.

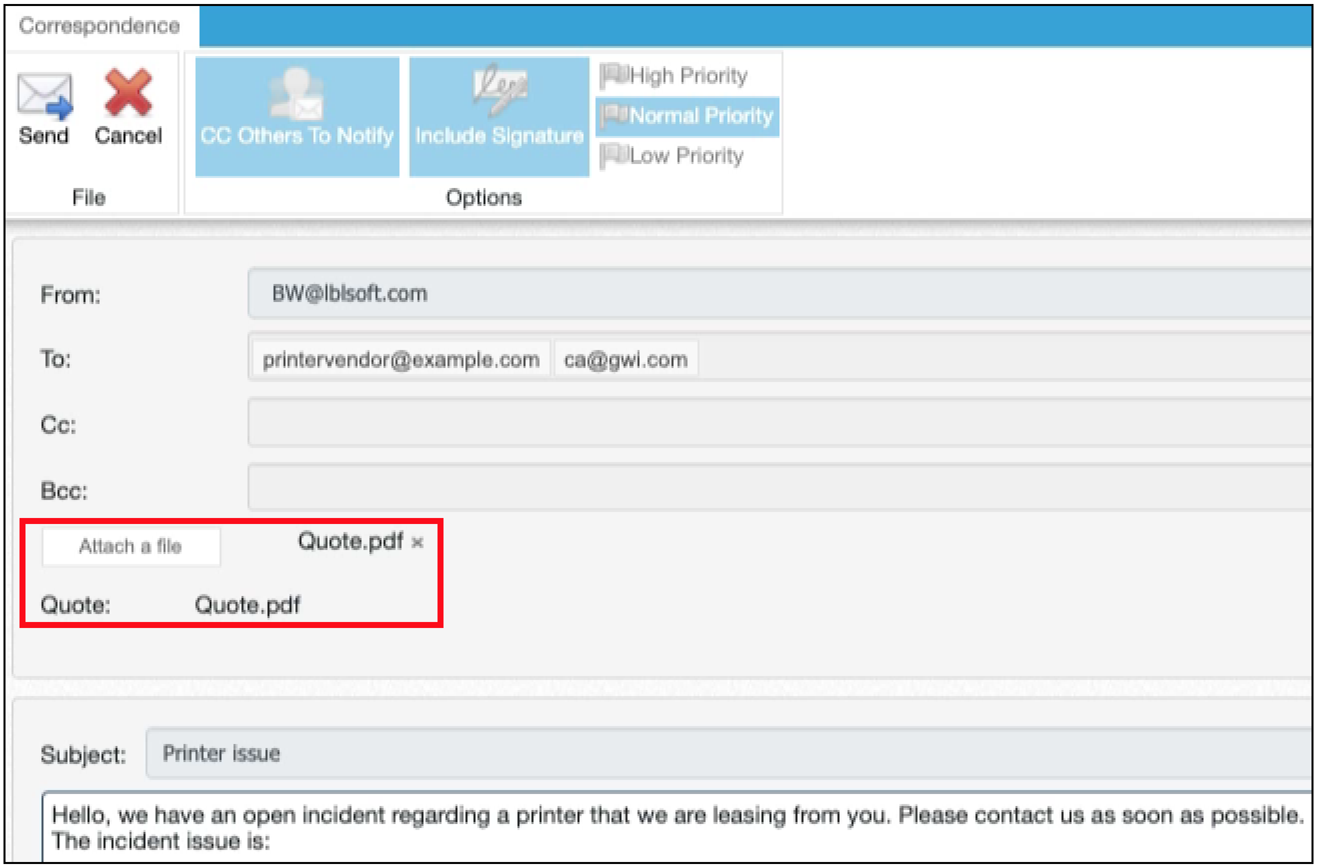
Setting To Exclude CI Statuses From Searches On Work Items

A Statuses to Exclude setting is now included on the Agents tab in the Configuration Management Feature Basics screen; it excludes configuration items with selected statuses from CI searches on work items.



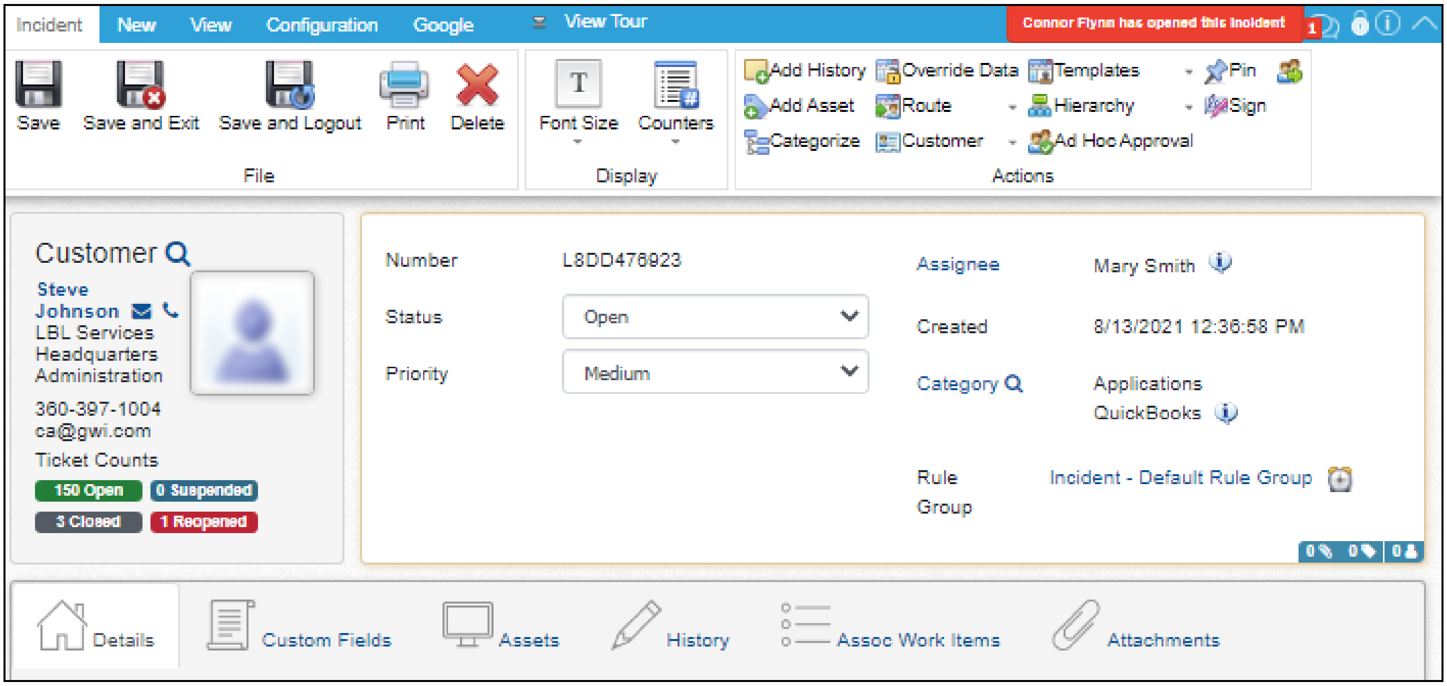
Opportunity Quote File Name Now Quote.PDF

The file name of generated opportunity quotes is now “Quote.pdf”. (The previous file name format included the date and time the file was generated.)



Newly Connected Rep Name Display in Awareness Feature Extended

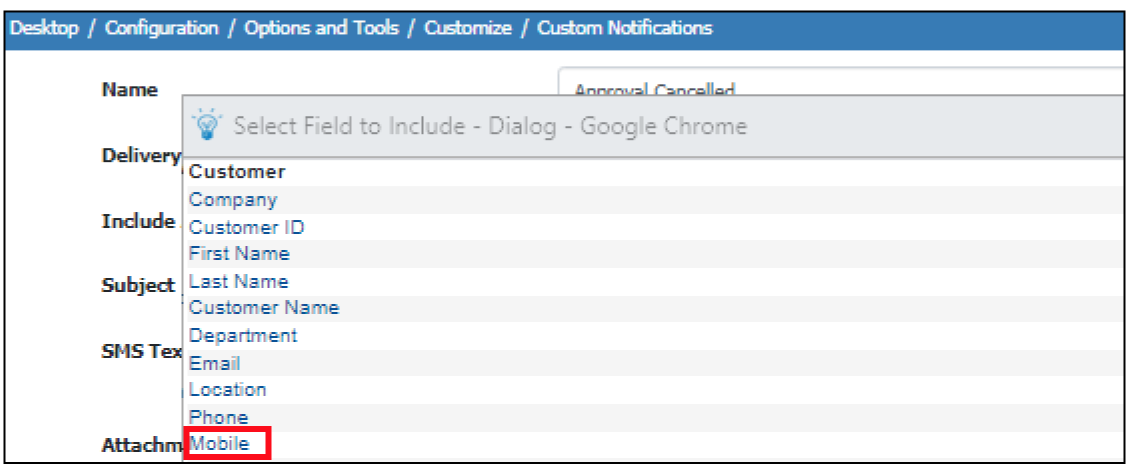
The time frame for which the name displayed for newly connected support representatives in the Awareness popup has increased from 10 seconds to 20 seconds.



Notifications

Customer Mobile Include Field Added For Correspondence and Custom Notifications

A Mobile field has been added to the list of Customer include fields for use in correspondence and custom notifications.

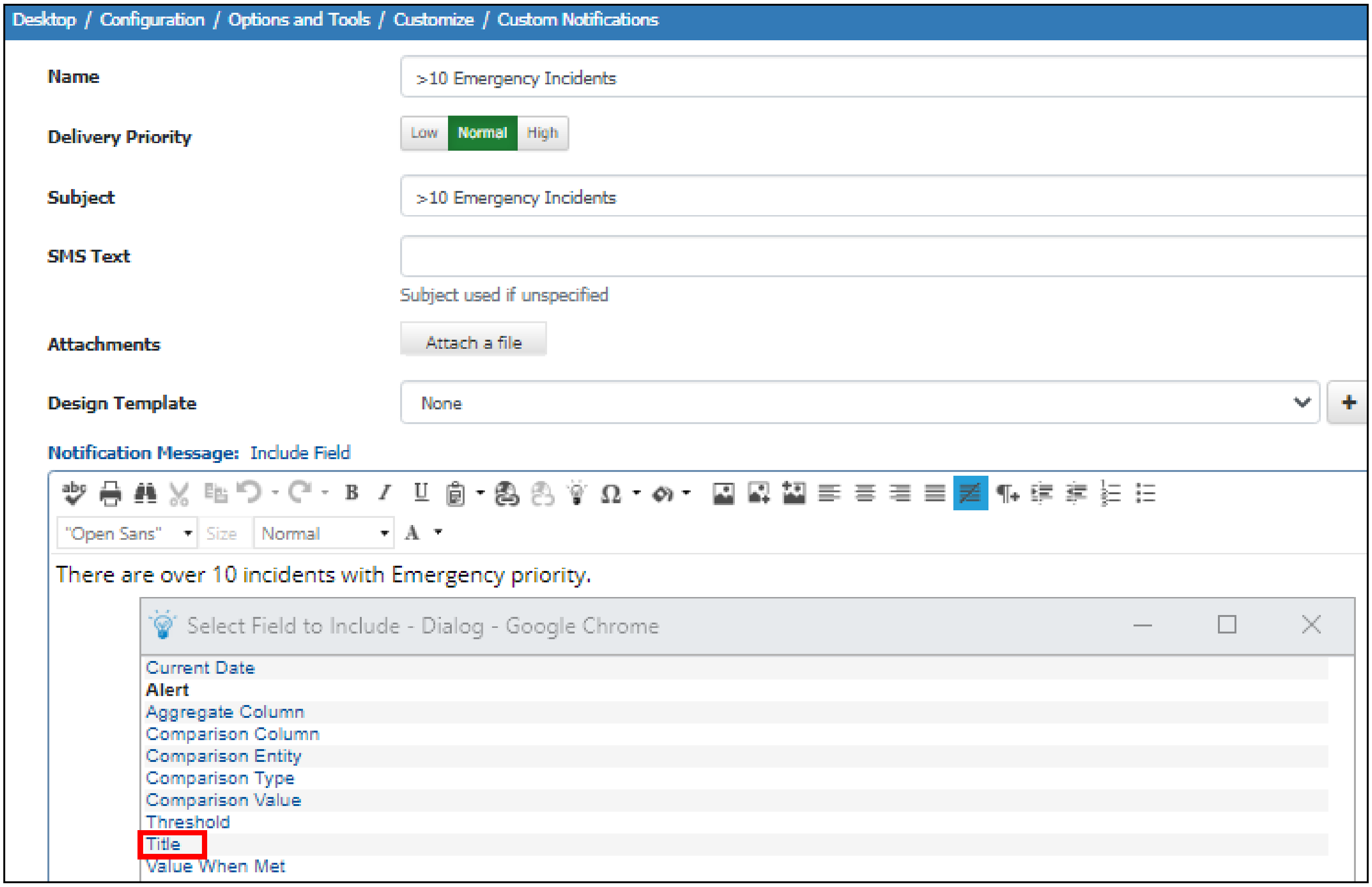


Assignee Set When Company Email Match Feature Qualifies New Customer Based On Email Domain/Company

If the customer assignee field has been added to the Customer Profile and Company Layouts and a new Customer Profile record is added via any source that uses the Company Email Match feature to match the new customer to an existing company, the assignee of the company is now set as the assignee of the new customer.

Title Field Added To Custom Notification Alert Include Field List

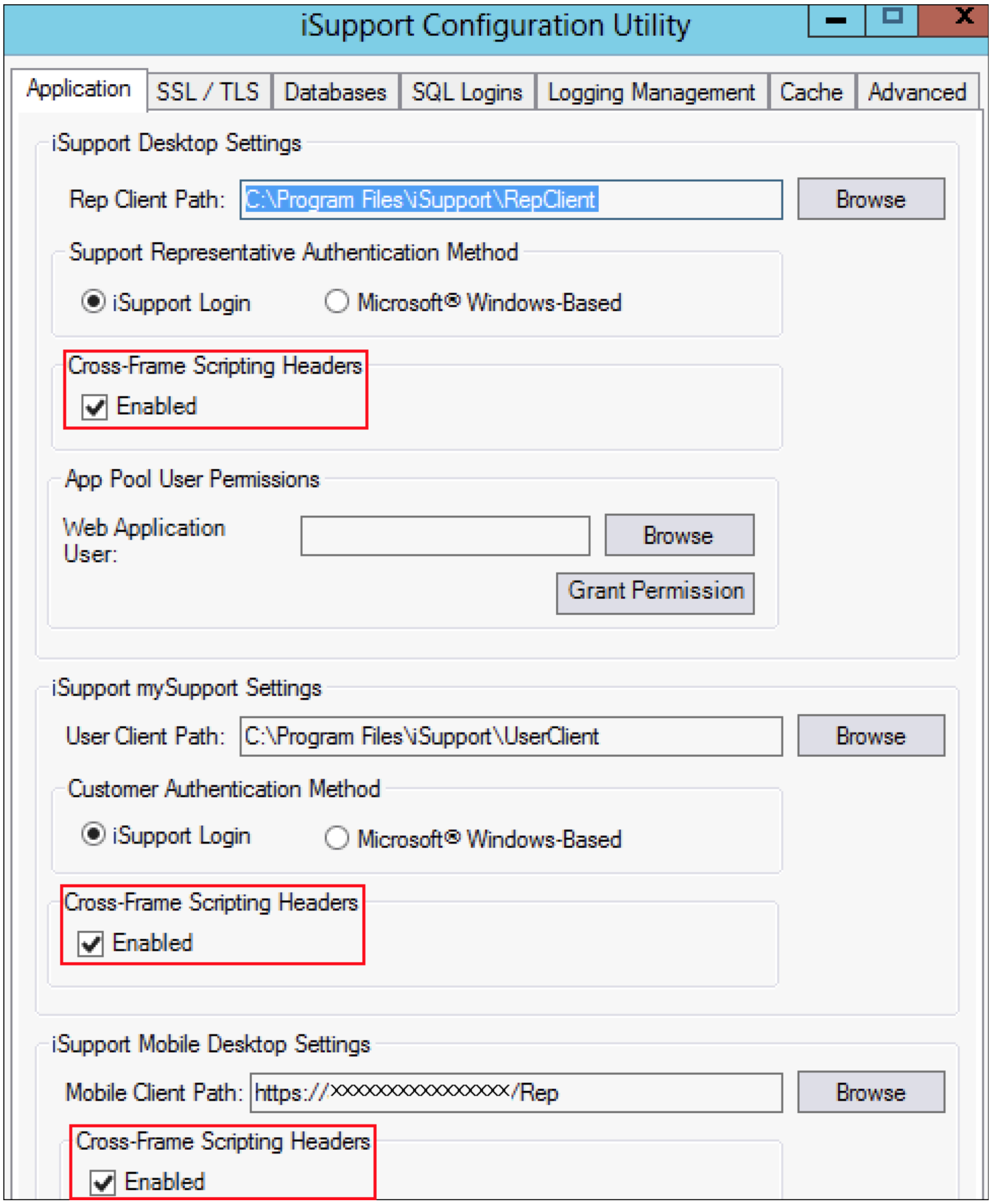
A Title field has been added to the list of Alert include fields in the Custom Notification screen.



Performance and Security

Cross-Frame Scripting Headers Added To iSupport Interfaces For Improved Security

To improve security, cross-frame scripting headers have been added to the Rep, Mobile, and mySupport interfaces for new installs and upgrades. We recommend that you enable cross-frame scripting headers via the Application tab in the iSupport Configuration Utility after upgrading. If you do load the Rep, Mobile, or mySupport interfaces from within an iFrame or you use the External mySupport Chat feature, you will need to add the site URLs for the interface (or from which external mySupport chat has been integrated) into the Approved Sites list.



Email Processing Loop Checks Reworked For Improved Performance

Email loop checks have been reworked to improve performance and fix minor issues.

Performance Enhancements for Views

After increasing the minimum Microsoft SQL Server version required to run iSupport in the previous edition, the Views feature has been reworked to provide improved performance.