

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.

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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.

The screenshot displays the 'Survey Configuration' interface. The breadcrumb trail at the top reads 'Desktop / Configuration / Core Settings / Surveys'. On the left, a navigation menu includes 'Details', 'Distribution' (highlighted), 'Questions', 'Rep Followup', 'Change Fields', and 'Incident Fields'. The main configuration area is divided into several sections:

- Available to mvSupport for Ad Hoc Use:** Yes (selected), No
- Available to Support Reps for Ad Hoc Use:** Yes (selected), No
- Send Notification:** (Custom) - Customer Satisfaction Survey (dropdown), +, edit icon
- Available to Survey Agent for Changes:** Yes (selected), No, ?
- Survey Interval:** 1, in Changes
- Interval Between Surveys to Same Customer:** 10, days
- Available to Survey Agent for Incidents:** Yes (selected), No, ?
- Survey Interval:** 1, in Incidents
- Interval Between Surveys to Same Customer:** 10, days

A red-bordered box highlights the 'Send Conditions for Agent and Rep Ad Hoc Use' section, which includes:

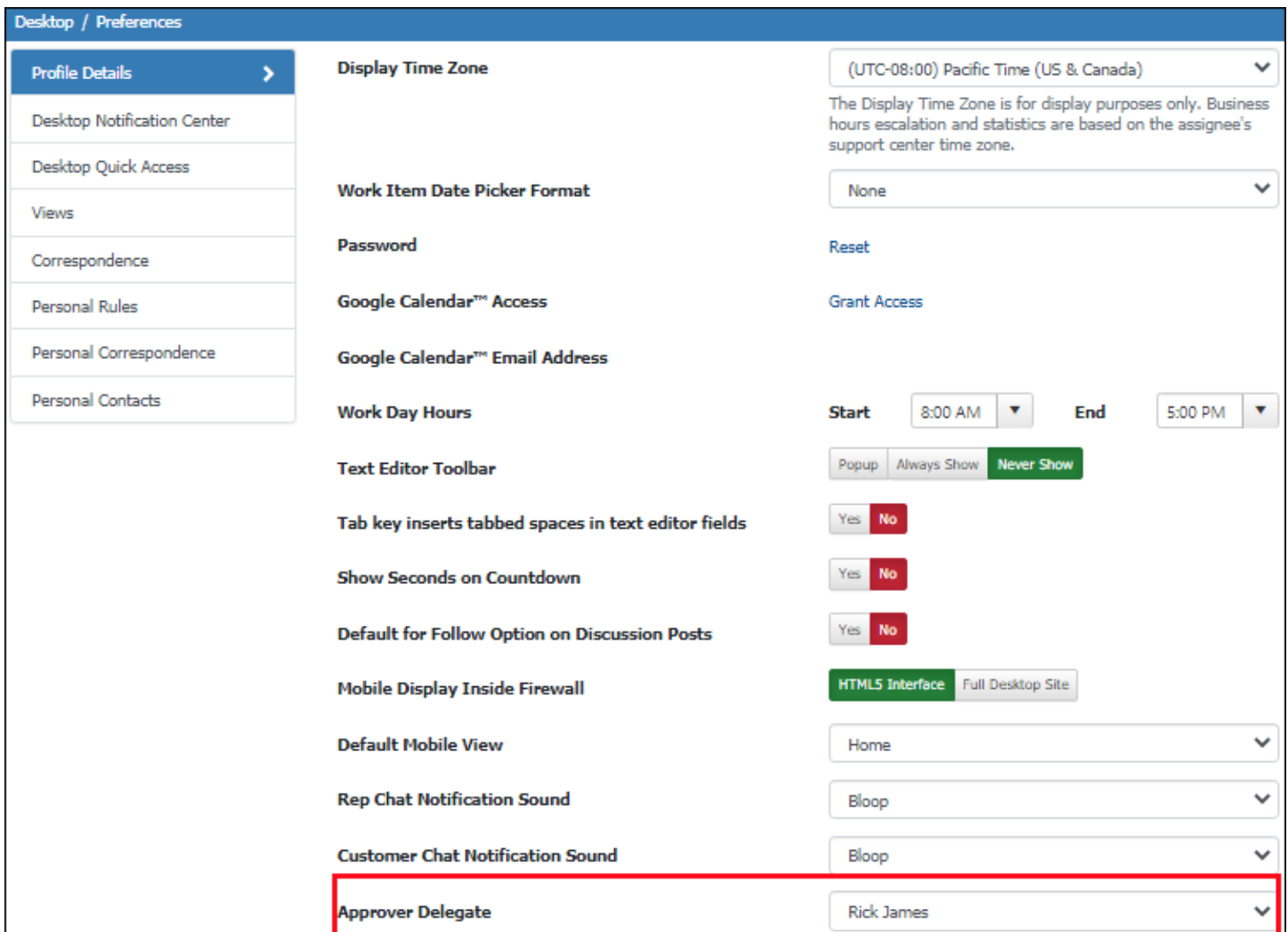
- Logic Operator:** All (dropdown), Edit, Delete buttons
- Category:** Applications>Operating System, Applications>Operating System>Mac OS, Applications>Operating System>Patches, Applications>Operating System>Windows (list with up/down arrows)
- Customer Groups:** Accounting (with 'x' icon)
- Rep Groups:** Human Resources (HR) (with 'x' icon)
- Closed Incident Statuses:** Closed (with 'x' icon)
- Closed Change Statuses:** Closed (with 'x' icon)

Approver Delegates For Support Representatives and Customers

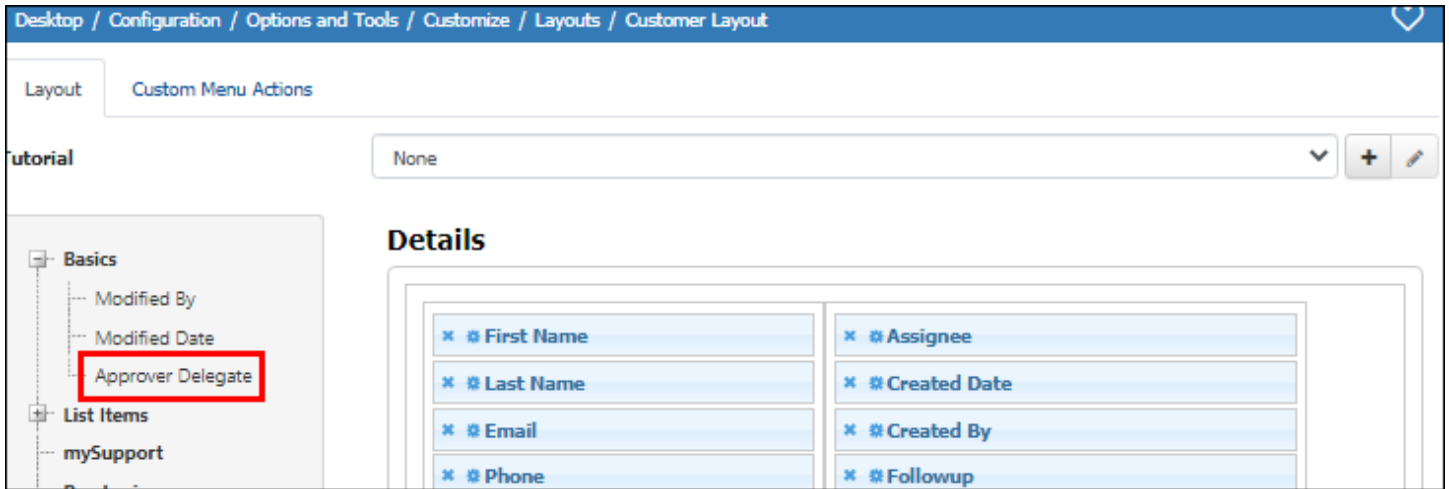
Use the Approver Delegate feature to designate a support representative or customer that can specify a verdict on work items pending approval for another support representative or customer. An approver delegate can be set for a support representative via the Approver Delegate field on the Advanced tab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



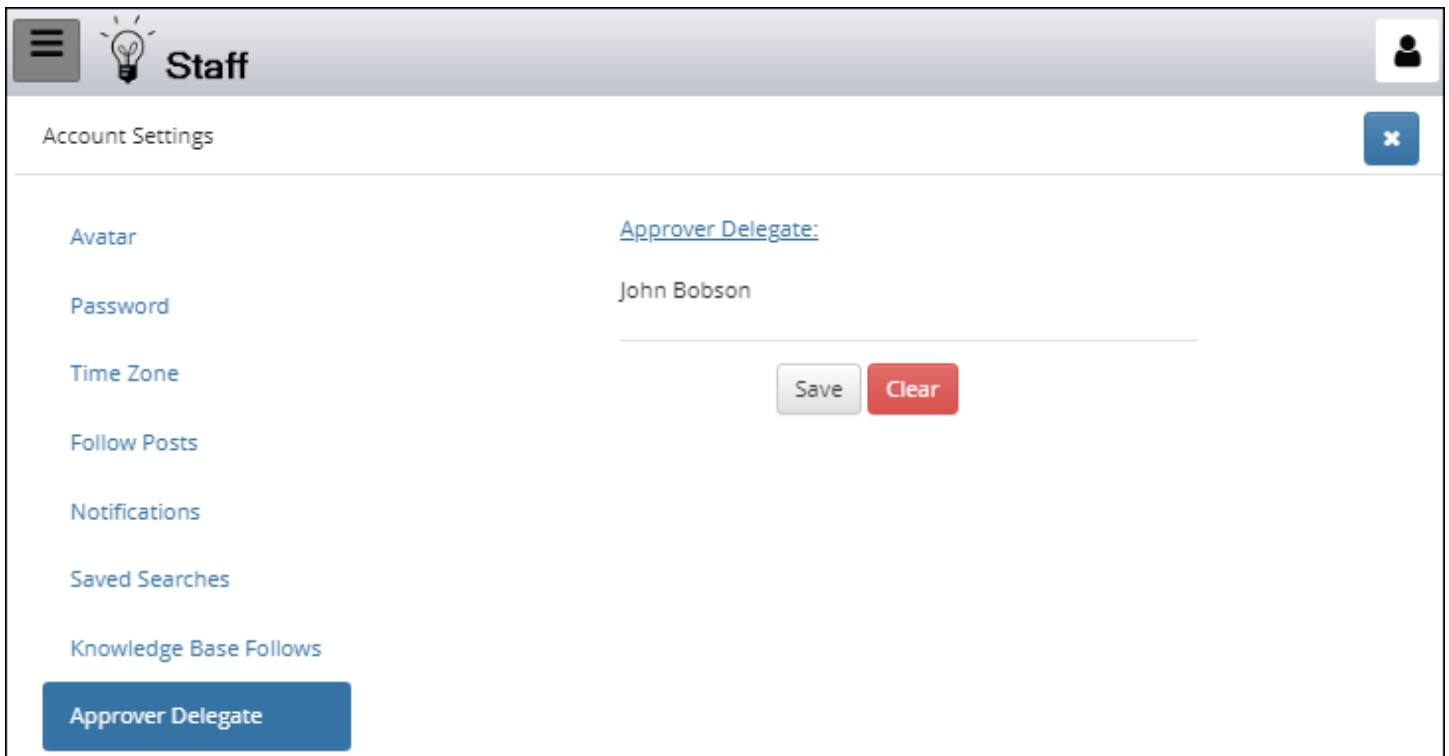
A support representative can set their approver delegate via the Profile Details tab in the Desktop Preferences screen.



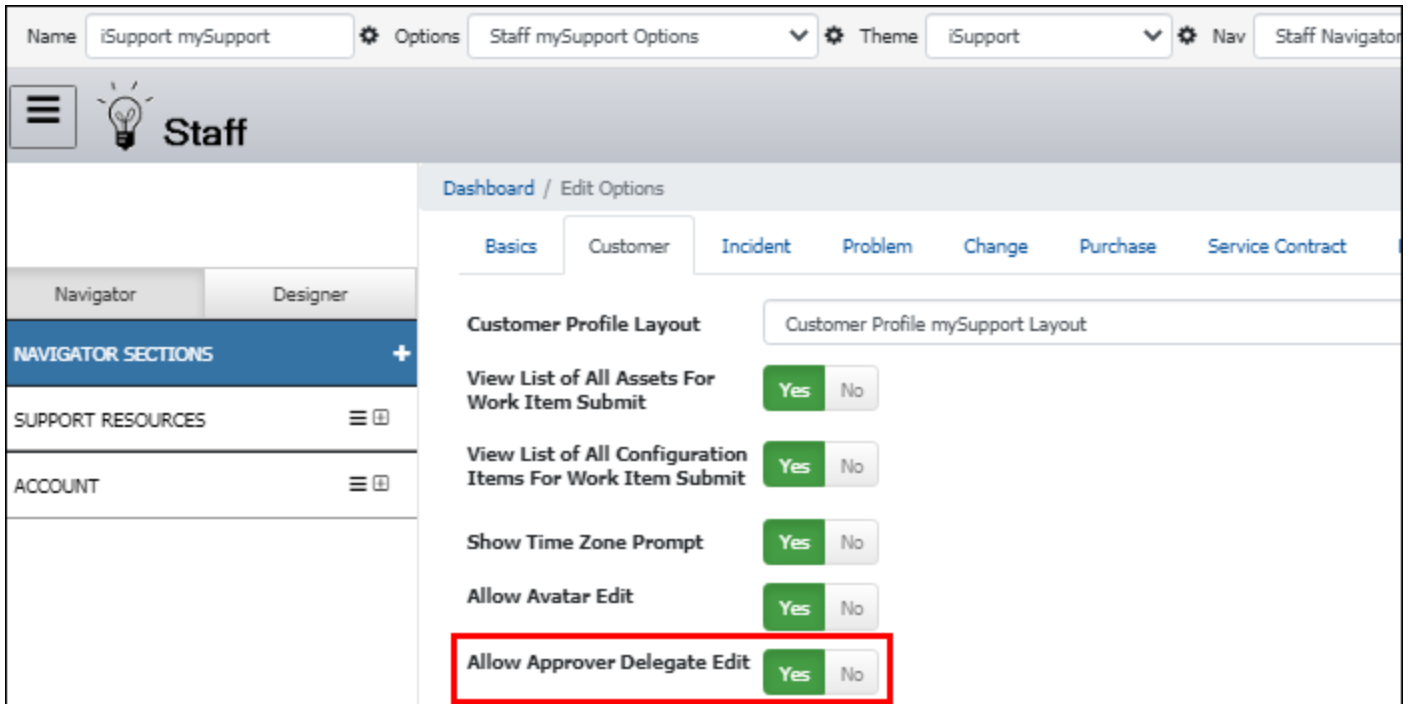
An approver delegate can be set for a customer by adding the Approver Delegate field to a Customer Profile layout.



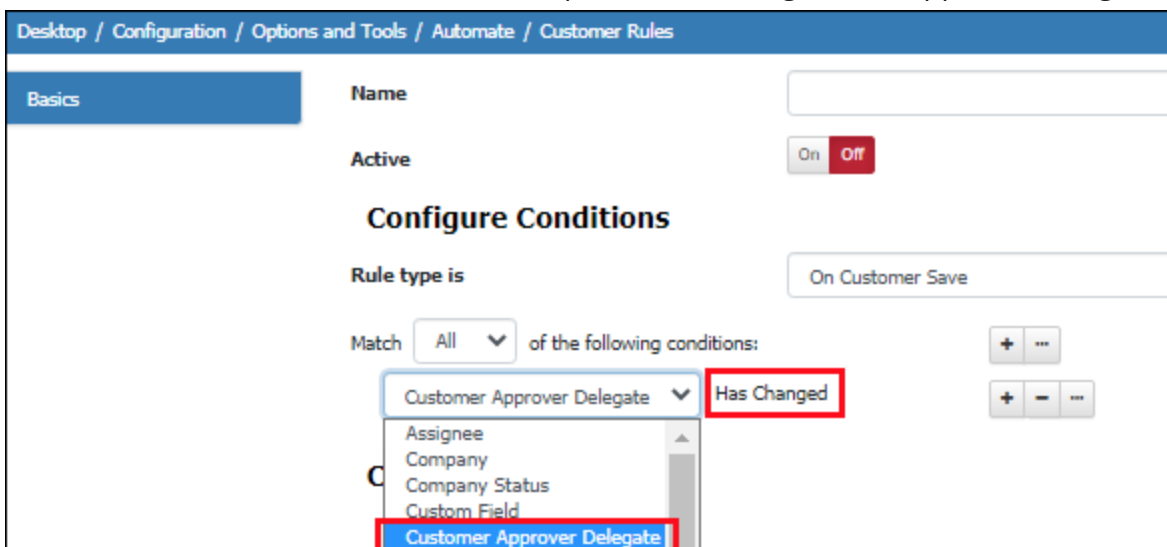
A customer can set their own approver delegate via the mySupport Account Settings screen.



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.

Desktop / Configuration / Options and Tools / Automate / Approval Cycles

Basics

Default Statuses

Approvers

Incident Notification Events

Change Notification Events

Purchase Notification Events

► Approval Initiated

▼ Approval Requested

Customer Approver	No Notification	+ / ✎
Customer Approver Delegate	iSupport Default	+ / ✎
Support Representative Approver (via Email)	No Notification	+ / ✎
Support Representative Approver (via Alt Email)	No Notification	+ / ✎
Support Representative Approver Delegate	iSupport Default	+ / ✎

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

History

Total Time Worked: 0 Minute

▼ + 4 0 2 0 0 0 0 2

👤 Connor Flynn 1 minute ago

- Application Access Approvals approval cycle: Connor Flynn (Rep) submitted approval for Barry White.
- Comment: Access approved

👤 Mary Smith 26 minutes ago

- Application Access Approvals approval cycle initiated.

👤 Mary Smith 34 minutes ago

- Set Priority To: Medium
- Set Status To: Open
- Set Customer To: Steve Johnson
- Set Customer To: Application, QuickBooks

👤 Mary Smith 44 minutes ago

- New incident created.

Condition Options For Incident, Change, and Problem Rules

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

Desktop / Configuration / Options and Tools / Automate / Incident Rules

Basics

Rule Groups

Name

Configure Conditions

Rule type is On Incident Save

Hours of Operation: None

Match All of the following conditions:

Description

Contains

Contains

Does Not Contain

Has Changed

Problem rules now have Description as a condition option.

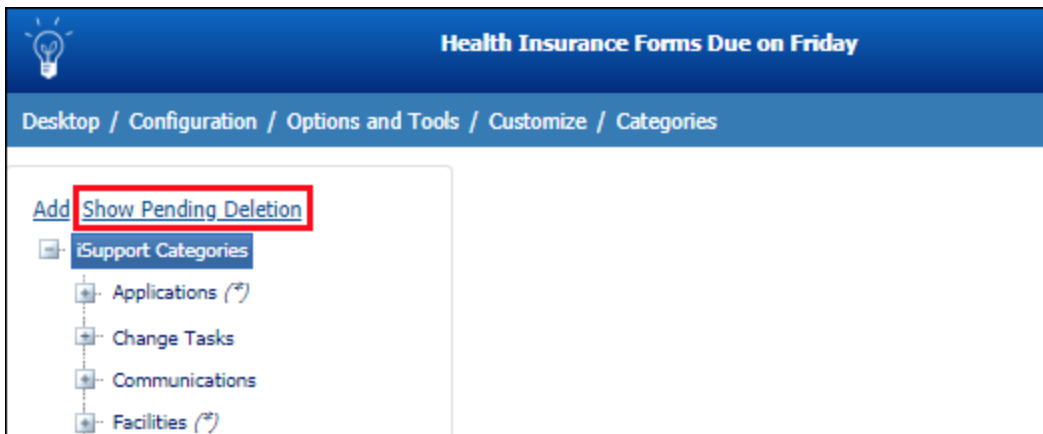
The screenshot shows the 'Configure Conditions' section of a configuration tool. The page title is 'Health Insurance Forms Due on Friday'. The breadcrumb trail is 'Desktop / Configuration / Options and Tools / Automate / Problem Rules'. On the left, there are tabs for 'Basics' and 'Rule Groups'. The main area contains the following fields:

- Name:** An empty text input field.
- Rule type is:** A dropdown menu set to 'On Problem Save'.
- Hours of Operation:** A dropdown menu set to 'None'.
- Match:** A dropdown menu set to 'All'.
- of the following conditions:** A section with a dropdown menu set to 'Description' (highlighted with a red box), followed by a dropdown menu set to 'Contains' and an empty text input field.

There are also '+' and '-' buttons for adding and removing conditions.

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.



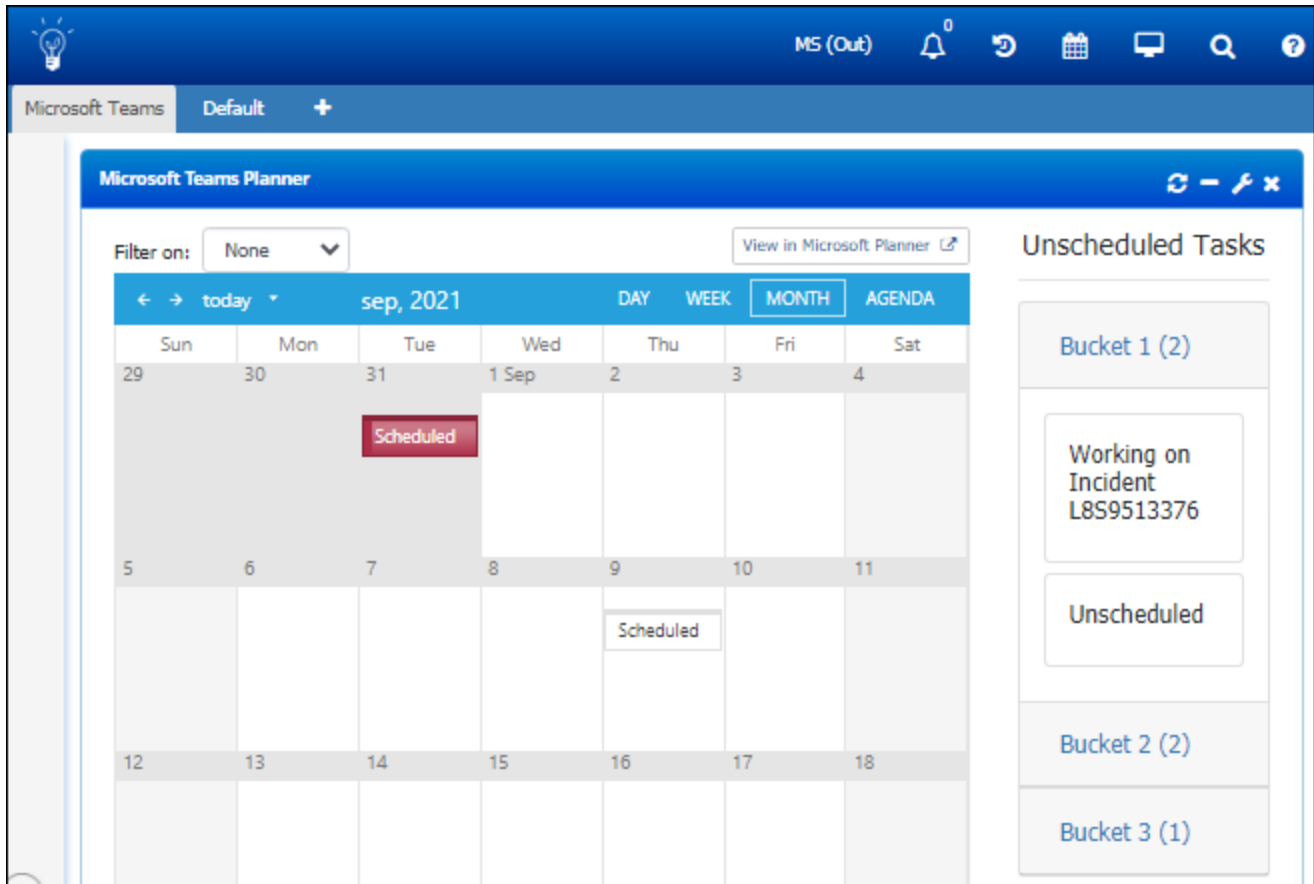
When the Show Pending Deletion link is selected, records that are pending deletion will display with a cross symbol.

The screenshot shows the iSupport application interface. At the top, there is a blue header with a lightbulb icon on the left, the text "Health Insurance Forms Due on Friday" in the center, and a user profile picture and name "Barry (In)" on the right. Below the header is a navigation bar with the text "Desktop / Configuration / Options and Tools / Customize / Categories". The main content area is a list of support categories. The categories are: "Add", "Hide Pending Deletion", "Support Categories", "Applications (*)", "Change Tasks", "Communications", "Facilities (*)", "Feature Request/Suggestion (*) (*)", "General Information (*) (*)", "Hardware (*)", "Human Resources Request (*)", "Network", "Server (*)", "Server (*)", "Services (*)", "Unlisted/Other (*)", and "Web Site". At the bottom of the list, there is a note "* Exposed to mySupport" and a link "† Pending Deletion" which is highlighted with a red box.

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.

The screenshot displays the Microsoft Planner application interface. On the left, a navigation pane shows 'Tasks' selected under the 'Recent' section. The main area shows a task board with a task titled 'Working on Incident L8S9513376' in 'Bucket 1'. A detailed view of this task is open, showing the following information:

- Title:** Working on Incident L8S9513376
- Status:** Last changed 5 days ago by you
- Assignee:** Assign (with a user icon)
- Labels:** Add label
- Bucket:** Bucket 1
- Progress:** Not started
- Priority:** Medium
- Start date:** Start anytime
- Due date:** Due anytime
- Notes:** Working on Incident L8S9513376. Rep link: <https://xxxxxxxxxxxxxxxxxxxxx/Rep/Incident/Default.aspx?ID=172363>. Customer link: <https://xxxxxxxxxxxxxxxxxxxxx/Incident/View/172363>
- Checklist:** Add an item
- Attachments:** Add attachment
- Comments:** Type your message here

At the bottom of the task detail view, a notification states: 'New Task "Working on Incident L8S9513376" created' by 'user' on 'August 27, 2021 8:41 AM'.

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.

Desktop / Configuration / Options and Tools / Customize / Layouts / Incident Layouts

Layout Colors Custom Menu Actions

Name Example Incident Layout

Tutorial None

Default Yes No

Customer Details

Title

Display Avatar Left Right No

Display Microsoft® Skype/Lync® Status Yes No


Add a field

Main Layout

- Basics
- List Items
 - Google Meet Meetings
 - Microsoft Teams Meetings
 - Microsoft Planner Tasks

Details

Tabs

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.

Incident New View Configuration Google View Tour

Incident Change Problem Purchase Customer Correspondence Knowledge Entry Survey Asset Headline Discussion Post Meeting Teams Meeting Planner Task

Associated Work Item Other Microsoft

Customer

Steve Johnson
LBL Services
Headquarters
Administration
360-397-1004
ca@gwi.com
Ticket Counts
150 Open 0 Suspended
3 Closed 1 Reopened

Number L8EL396298 Assignee Mary Smi

Status Open Created 8/14/2021

Priority Medium Category Applicatio QuickBoo

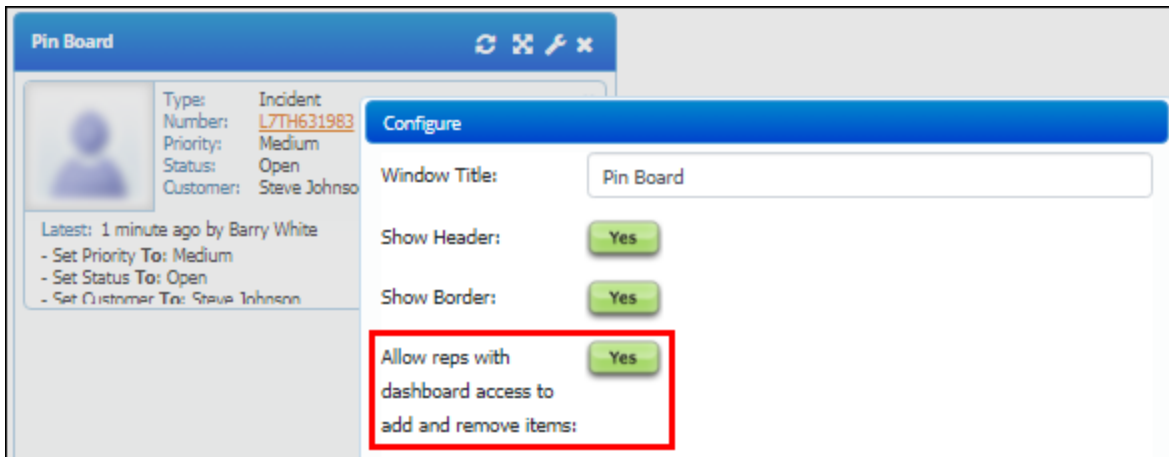
Rule Group Incident - Default

Details Custom Fields Assets History Assoc Work Items Attachments Others to Notify

Description
New employee John Smith needs access to the Accounting application.

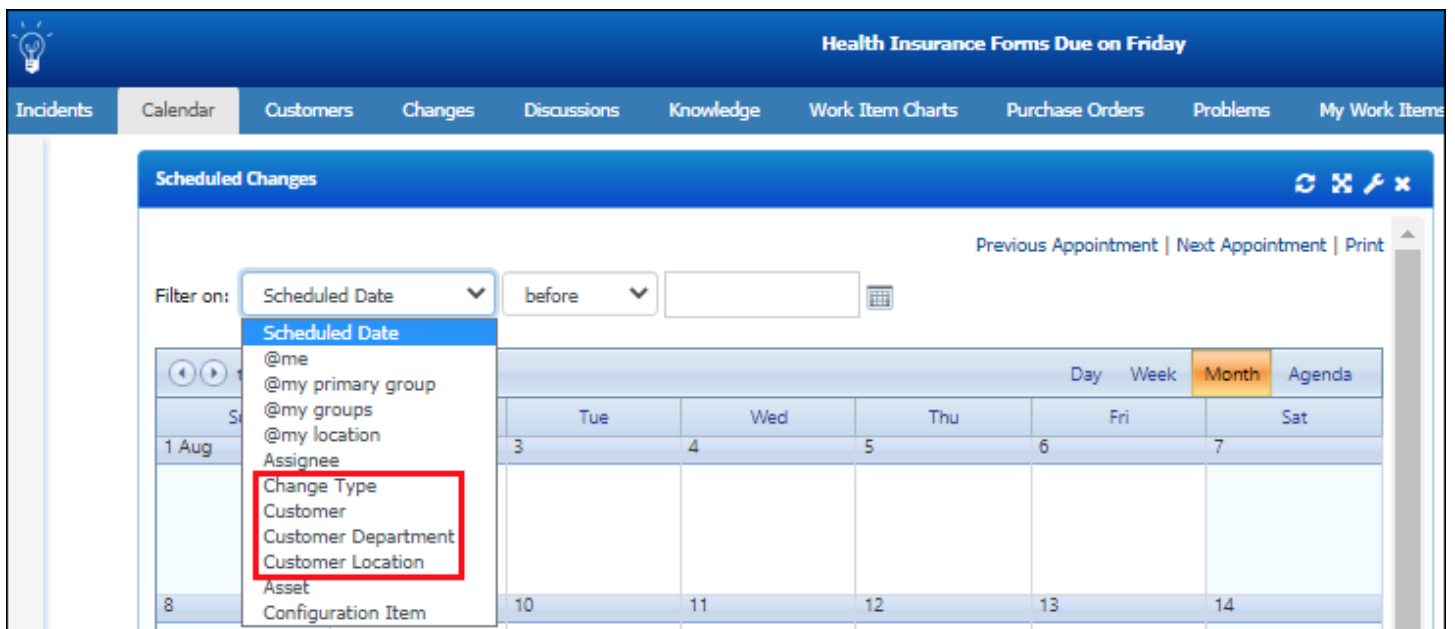
Setting To Allow Editing On Pin Boards

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

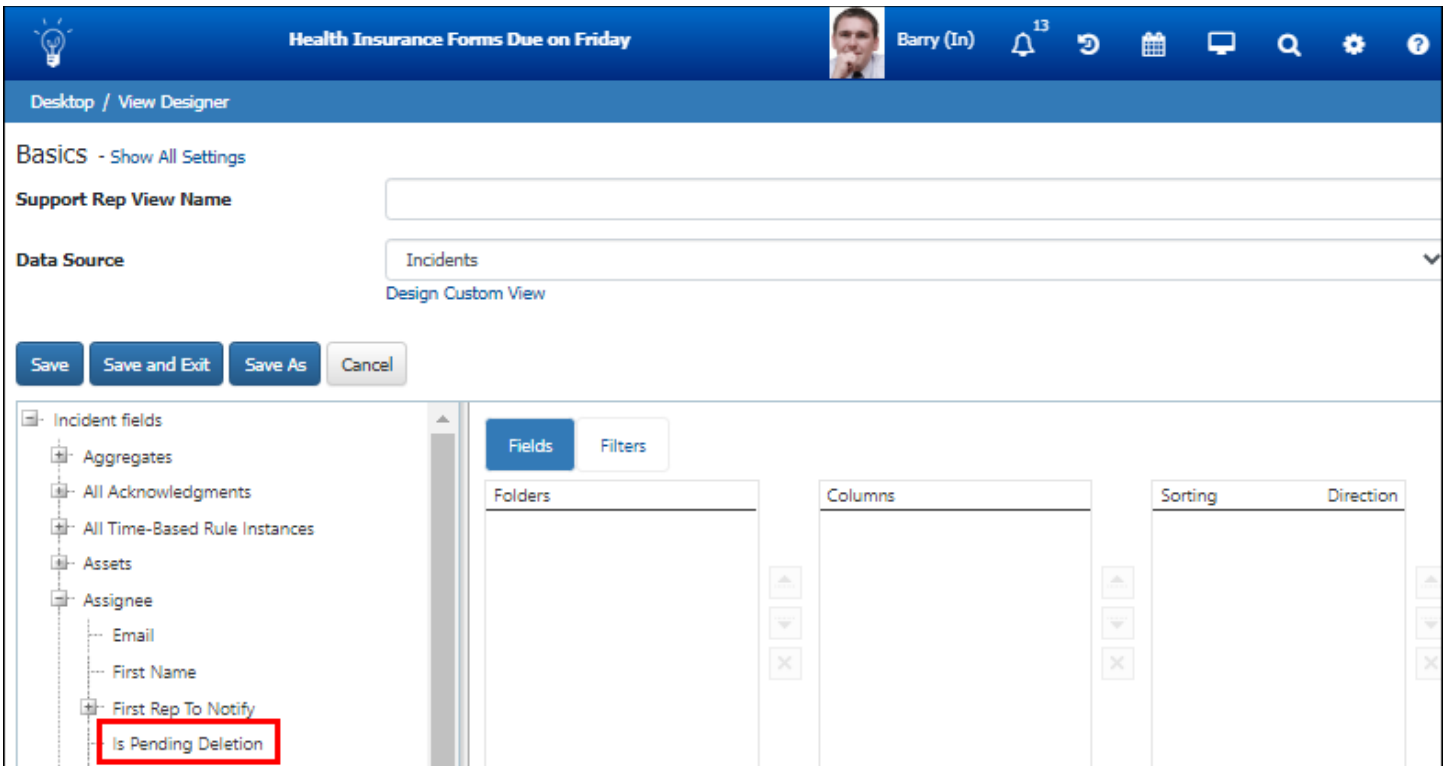
Support representatives can now filter on Change Type, Customer Department, Customer, and Customer Location in the Scheduled Change Calendar component.



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.



The screenshot shows the iSupport View Designer interface. At the top, there is a blue header with a lightbulb icon, the text "Health Insurance Forms Due on Friday", a user profile for "Barry (In)", and several utility icons. Below the header, the breadcrumb "Desktop / View Designer" is visible. The main content area is titled "Basics - Show All Settings". It includes a "Support Rep View Name" field, a "Data Source" dropdown menu set to "Incidents" with a "Design Custom View" link below it, and four buttons: "Save", "Save and Exit", "Save As", and "Cancel". A tree view on the left lists "Incident fields" with sub-items: "Aggregates", "All Acknowledgments", "All Time-Based Rule Instances", "Assets", "Assignee", "Email", "First Name", "First Rep To Notify", and "Is Pending Deletion". The "Is Pending Deletion" item is highlighted with a red rectangular box. To the right of the tree view are three panels: "Fields", "Filters", and "Sorting", each with a "Direction" column and up/down arrows.

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.

The screenshot shows the 'View Designer' interface. At the top, it says 'Desktop / View Designer'. Below that, there's a 'BASICS - Show All Settings' section. The 'Support Rep View Name' is 'Copy of Archived Purchases by Number'. The 'Data Source' is 'Archived Purchases'. There are buttons for 'Save', 'Save and Exit', 'Save As', 'Cancel', 'New Chart', and 'New Alert'. The main area is divided into 'Fields' and 'Filters'. The 'Fields' section has a 'Line Items' folder expanded, showing a list of fields: Count, Amount Received, Amount Requested, Comments, Delivery Date, Expected Date, Product, Quantity Received, Quantity Requested, Rate, and Vendor Name. The 'Columns' section shows a list of columns: Number, Date Created, Author, Recipient, Requested By, Bill To, Cost Center, Job Function, and Date Closed. At the bottom, there's a 'Preview' section with a table of columns: Number, Date Created, Author, Recipient, Requested By, and Bill To.

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.

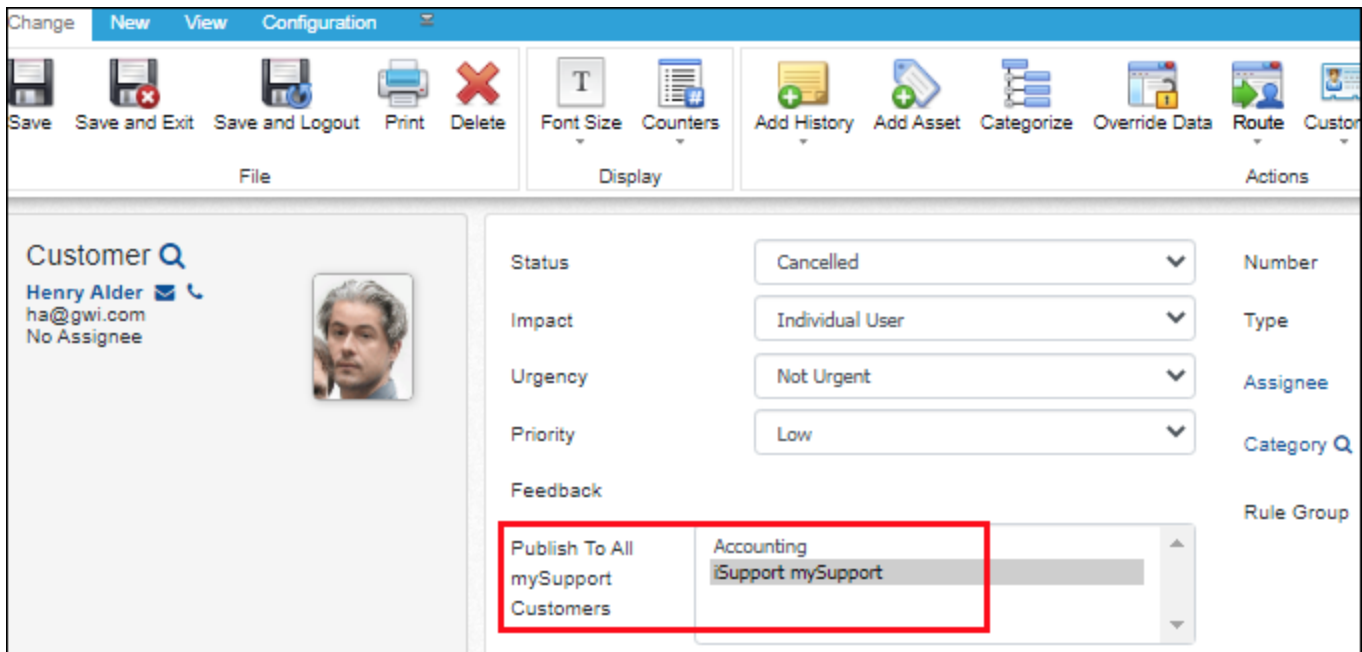
The screenshot shows the mySupport portal interface. At the top, there's a 'Staff' header with a lightbulb icon. Below that, there's a navigation bar with links: Home, Calendar, Schedule, Knowledge Base, Incidents, Self Help Guide, Charts, and C. Below the navigation bar, there's a search bar with the text 'I cannot print'. Below the search bar, there's a message: 'Displayed below are the results we found for your search criteria. Didn't find what you're looking for?'. At the bottom, there's a row of buttons: 'Create a Post', 'I Need Help', 'Start a Chat', and 'Create an Incident'. The 'Start a Chat' button is highlighted with a red box.

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

The screenshot shows the Staff configuration interface. At the top left, there is a navigation menu icon and the word "Staff" next to a lightbulb icon. Below this, there are two tabs: "Navigator" and "Designer". The main content area is titled "Dashboard / Global Search Settings / Edit Options". There are several tabs for different categories: "Basics", "Customer", "Incident", "Problem", "Change", "Purchase", and "Service Contract". The "Basics" tab is selected. On the left side, there is a sidebar with sections: "NAVIGATOR SECTIONS", "SUPPORT RESOURCES", and "ACCOUNT". The "Global Search" option is highlighted in blue. The main content area is divided into several sections: "Override Help Text" (with a text input field containing "Leave empty to use default"), "Include in Search" (with a list of options: Change, FAQ, Headline, Incident, Knowledge Entry), "Headline Feed" (with a text input field containing "Headline Feed"), "Change Feed" (with a text input field containing "Change Feed"), "Incident Feed" (with a text input field containing "Incident Feed"), "Knowledge Entry Feed" (with a text input field containing "Knowledge Entry Feed"), "Problem Feed" (with a text input field containing "Problem Feed"), "Purchase Feed" (with a text input field containing "Purchase Feed"), and "Include Buttons To" (with a list of options: Create an Incident, Start a Chat, Display Self Help Guides, Create a Discussion Post). The "Start a Chat" option is highlighted with a red box.

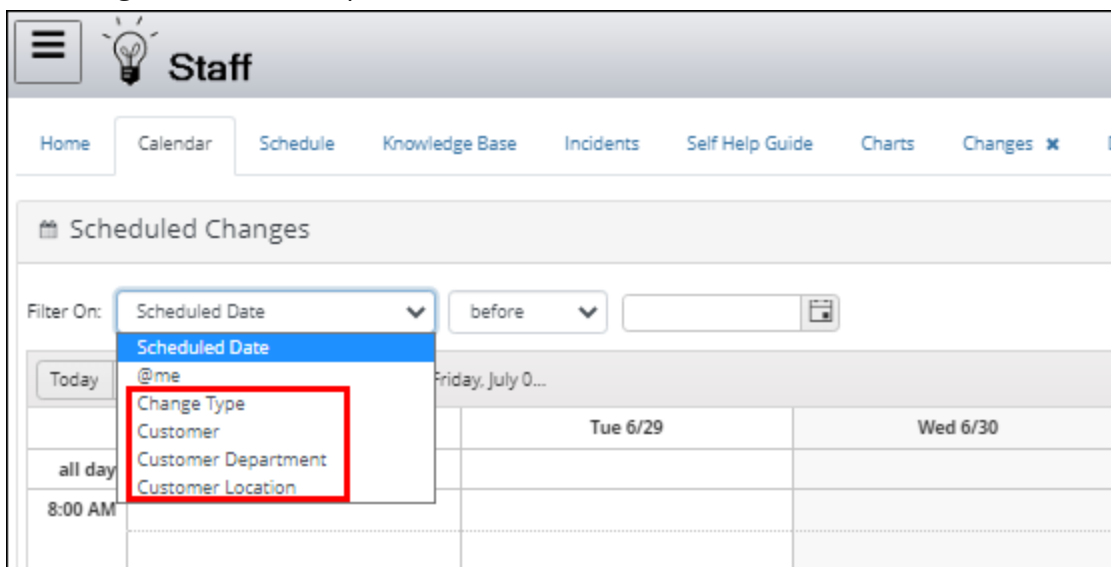
Publish to mySupport From Change

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.

Desktop / Configuration / Options and Tools / Integrate / Single Sign On Integrations

Name: Shibboleth mySupport

Active: On Off

Target: mySupport

Hide Login Content on mySupport: On Off

Login Button Text: Log In Via Shibboleth

Load settings from metadata file:

Issuer: http://<servername>/user

Single Sign On URL: https://<servername>/idp/profile/SAML2/Redirect/SSO

X509 Certificate: [Text area with asterisks]

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.

Desktop / Configuration / Core Settings / Basics

Enable Features

- Asset Management
- Change Management**
- Configuration Management
- Incident Management
- Knowledge Management
- Opportunity Management
- Problem Management
- Purchasing
- Service Contract Management

Basics | Work History | Hierarchies | Feedback | Routing | Agents

Default Assignee: Unassigned Author

Default Mapping: Impact: Individual, Urgency: Not Urgent, Priority: Low

Default Change Type: Normal

Default Status: Open

Interval Type: Calendar Days Business

Require Scheduled Implementation Date: On Off

Require Due Date: On Off

Attachment Field Control and Custom Submission Messages for Service Catalogs

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

Desktop / Configuration / Options and Tools / Automate / Service Catalog

Service Catalog Section: Services

Position: 1

Group Access: Customer Services

Image: Add

Root Service Request Entry: Customer

Placeholder: Yes No

Allow Attachment Upload: Yes No

Show Custom MySupport Submission Message: Yes No

Custom MySupport Submission Message: Request submitted.
Leave empty to show no message

Image: Add | Remove

Header Title: Click Here for Cost Details

Header: Costs will be billed automatically to your department.

- 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.

Expand All Collapse All

Customer Services (Total Cost: \$0.00)

- Accounting Application Training
- Accounting Training
- Security Clearance Request
- Company Orientation
- Workstation Configuration
- Laptop - Windows
- Laptop - Macintosh
- Webinar Registration

Name: Laptop - Windows
Associated Cost: \$0.00

Run complete diagnostic test, install company applications.

Department Code: 8675309

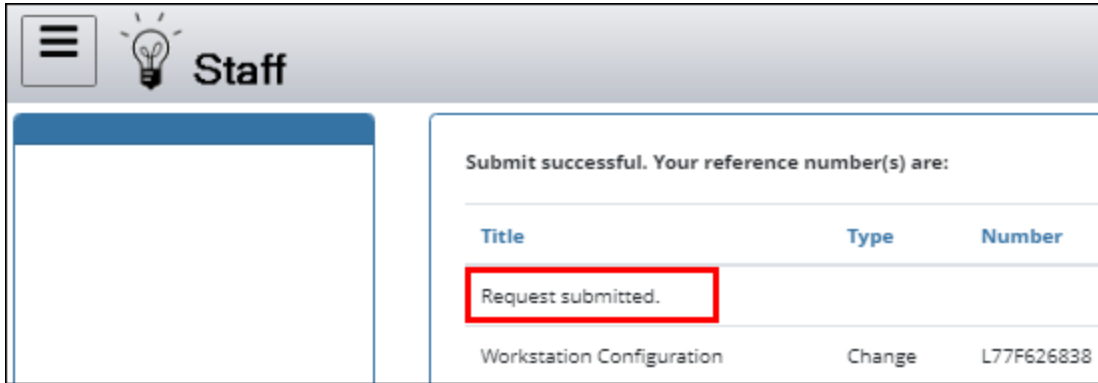
Vendor Involvement Needed: Yes No

Add

Choose File

File Name	Size	Type	Date File Attached	
CustDataAttachment.xls	28.16K	application/vnd.ms-excel	7/6/2021 4:44:55 PM	Delete

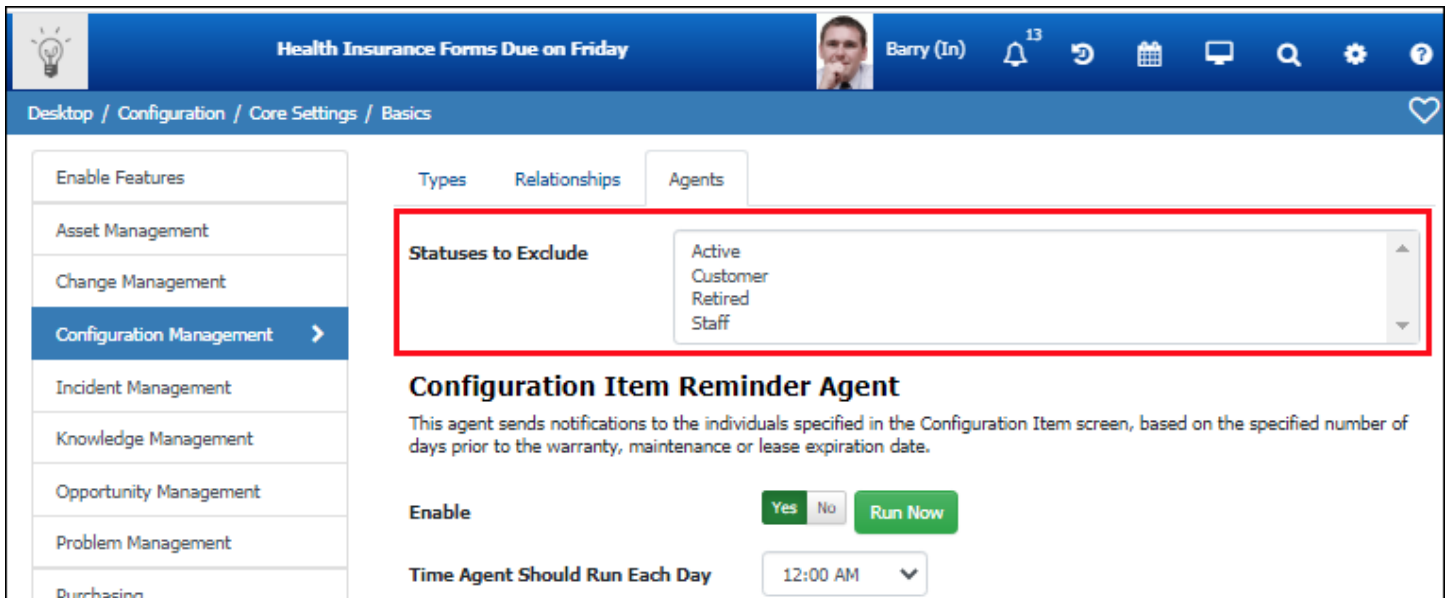
- Use the Show Custom mySupport Submission Message field to display text that will appear after a request has been submitted.



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

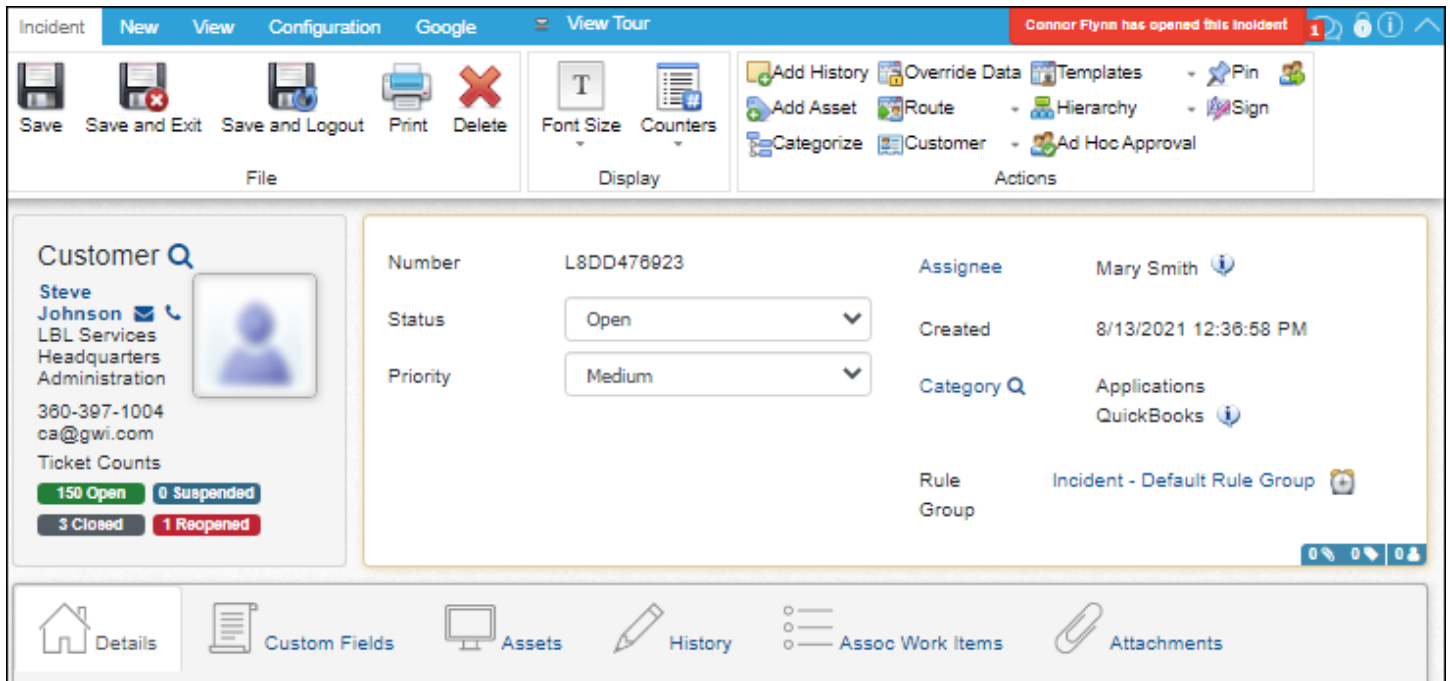
The file name of generated opportunity quotes is now "Quote.pdf". (The previous file name format included the date and time the file was generated.)

The screenshot shows an email composition window with the following details:

- Correspondence** header with **File** and **Options** tabs.
- File** tab: Send (envelope icon), Cancel (red X icon).
- Options** tab: CC Others To Notify (person icon), Include Signature (signature icon), and priority options: High Priority, Normal Priority (selected), Low Priority.
- From:** BW@ibissoft.com
- To:** printervendor@example.com, ca@gwi.com
- Cc:** (empty)
- Bcc:** (empty)
- Attachments:** A red box highlights the "Attach a file" button and the attached file "Quote.pdf x".
- Quote:** Quote.pdf
- Subject:** Printer issue
- Body:** Hello, we have an open incident regarding a printer that we are leasing from you. Please contact us as soon as possible. The incident issue is:

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.

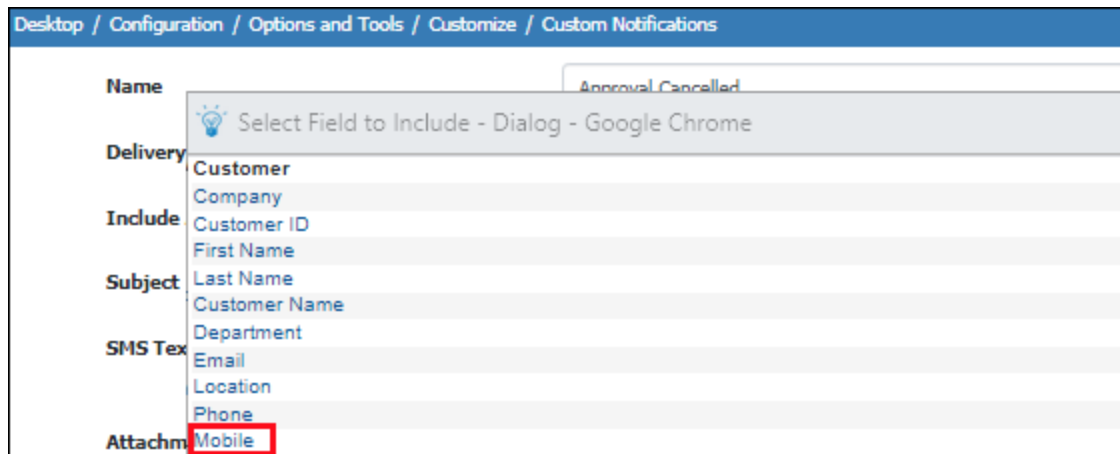


The screenshot displays the iSupport incident management interface. At the top, there is a navigation bar with tabs for 'Incident', 'New', 'View', 'Configuration', 'Google', and 'View Tour'. A notification in the top right corner states 'Connor Flynn has opened this incident'. Below the navigation bar are three main sections: 'File' (Save, Save and Exit, Save and Logout, Print, Delete), 'Display' (Font Size, Counters), and 'Actions' (Add History, Override Data, Templates, Pin, Add Asset, Route, Hierarchy, Sign, Categorize, Customer, Ad Hoc Approval). The main content area is divided into two columns. The left column shows the customer profile for 'Steve Johnson', including contact information and ticket counts: 150 Open, 0 Suspended, 3 Closed, and 1 Reopened. The right column shows incident details for 'L8DD476923', including the assignee 'Mary Smith', status 'Open', priority 'Medium', and category 'Applications QuickBooks'. A bottom navigation bar contains icons for 'Details', 'Custom Fields', 'Assets', 'History', 'Assoc Work Items', and 'Attachments'.

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.



The screenshot shows the 'Custom Notifications' configuration dialog box in iSupport. The dialog has a title bar with the path 'Desktop / Configuration / Options and Tools / Customize / Custom Notifications'. It features a 'Name' field with the value 'Approval Cancelled'. Below this is a 'Delivery' dropdown menu. The 'Include' section contains a list of fields: 'Customer ID', 'First Name', 'Last Name', 'Customer Name', 'Department', 'Email', 'Location', 'Phone', and 'Mobile'. The 'Mobile' field is highlighted with a red box. The 'SMS Text' field is currently empty. The 'Attachments' field is also empty.

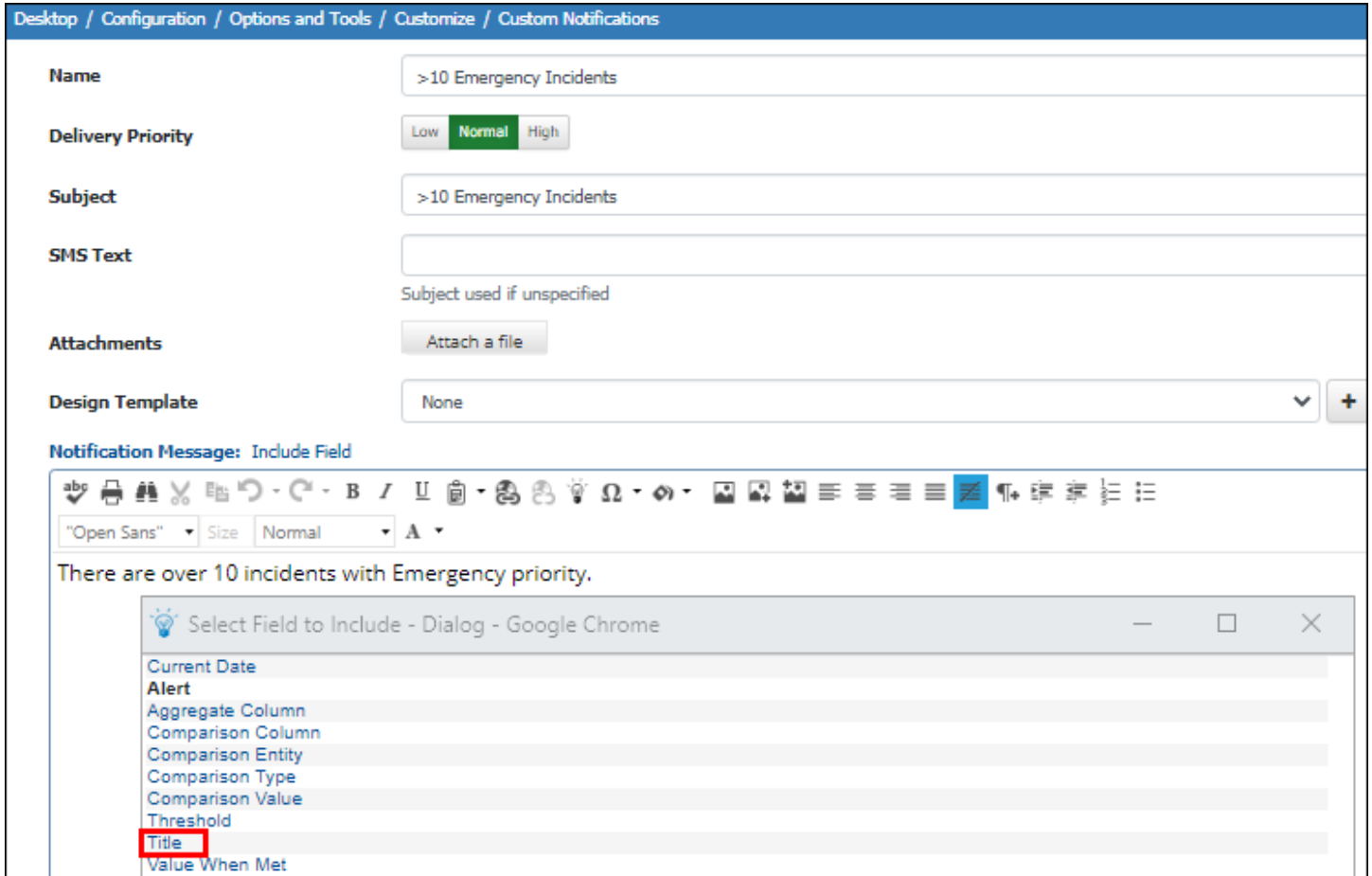
Assignee Set When Company Email Match Feature Qualifies New Customer Based On Email Domain/Company

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.



The screenshot displays the 'Custom Notifications' configuration interface. The top navigation bar shows the path: Desktop / Configuration / Options and Tools / Customize / Custom Notifications. The configuration form includes fields for Name (>10 Emergency Incidents), Delivery Priority (Normal), Subject (>10 Emergency Incidents), SMS Text (empty), Attachments (Attach a file), and Design Template (None). Below the form is a rich text editor for the 'Notification Message: Include Field'. The message content is 'There are over 10 incidents with Emergency priority.' A dialog box titled 'Select Field to Include - Dialog - Google Chrome' is open over the message, listing various fields: Current Date, Alert, Aggregate Column, Comparison Column, Comparison Entity, Comparison Type, Comparison Value, Threshold, Title (highlighted with a red box), and Value When Met.

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.

The screenshot shows the 'iSupport Configuration Utility' window with the 'Application' tab selected. The window is divided into three main sections, each with a 'Cross-Frame Scripting Headers' checkbox checked and highlighted with a red box:

- iSupport Desktop Settings:** Includes 'Rep Client Path' (C:\Program Files\Support\RepClient), 'Support Representative Authentication Method' (iSupport Login selected), and 'App Pool User Permissions' (Web Application User field and Grant Permission button).
- iSupport mySupport Settings:** Includes 'User Client Path' (C:\Program Files\Support\UserClient) and 'Customer Authentication Method' (iSupport Login selected).
- iSupport Mobile Desktop Settings:** Includes 'Mobile Client Path' (https://xxxxxxxxxxxxxxxx/Rep).

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.