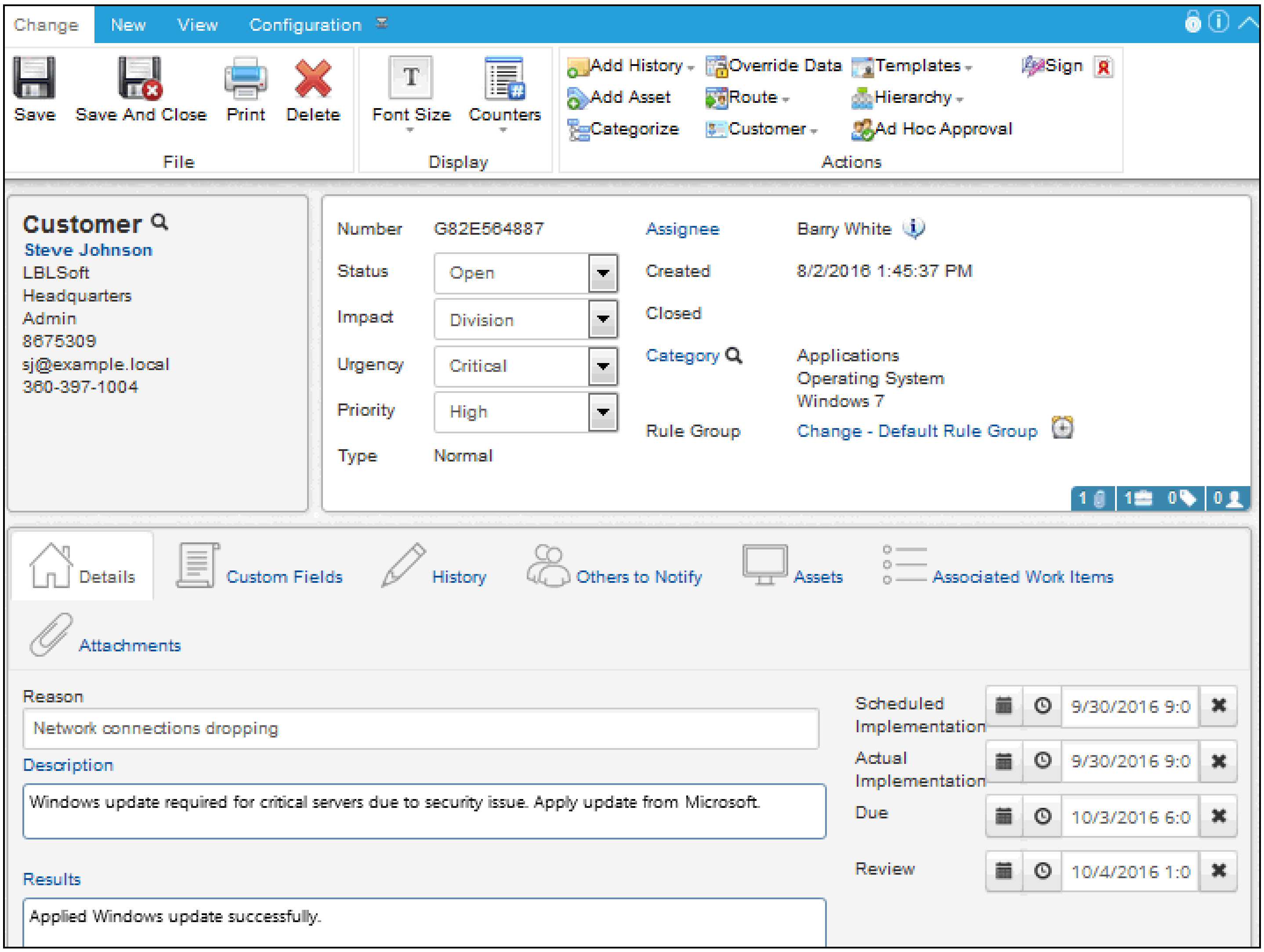
Configuring iSupport Change Functionality

Change functionality is available if you have the Service Desk version of iSupport. Use Change functionality to record and track requests related to services and assets, ensuring that standard methods and procedures are used. Change records can be created via email processing, the Rep, Mobile, and mySupport portals, and the Incident, Problem, Change, and Customer screens. You can schedule a single occurrence change or a recurring set of changes to be created with an open status at a future date/time.



In addition to the functionality listed below in the Configuration Overview, you can do the following in the Change screen:

- Use the Scheduled Implementation, Actual Implementation, Review, and Due Date fields to enter the important dates/times applicable to the change. Dates may appear in these fields by default if configured. The Scheduled Implementation, Review, and Due Date fields are tied to notification functionality; warning notifications may be sent to configured recipients a specified number of hours before the date entered in these fields, and notifications may be sent to configured recipients after the date entered in these fields has passed.
- Send and track correspondence from the Change screen. Correspondence and configurable event notifications can include data from Change records; correspondence templates can be utilized, and an Others to Notify list can be used for keeping those not directly involved in the Change process in the loop.

- Add a discussion post to a selected feed from the Change screen.
- Create related changes. A related change contains all of the same fields as a regular change; you can close all related changes automatically when you close the original change. All existing change functionality applies to related changes. Related Change records can be created in a hierarchy structure.
- View and open related asset records and perform asset scans 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).
- Associate new and existing incidents, configuration items, problems, and purchase requests.

Configuration Overview

Basic Configuration

Use the following options under Core Settings:

- Enable and set **basic Change options** via the Feature Basics screen. You can set **work history** options and configure **routing** methods based on skill, location, name, or group. All methods can also include round robin and load balancing (which involves weights based on priority). See "Setting Change Basics Configuration Options" on page 4 for more information. You can also create customized labels for the Standard, Normal, and Emergency **Change types**; see "Setting Up Custom Change Types" on page 8.
- If applicable, configure **service contract functionality** to track and restrict changes associated with customers, companies, and assets using service contracts via the Feature Basics screen. Contracts can be based on work item count (a specified number of changes), hourly count (a specified number of hours), duration (time frame in days), or a combination (limiting the number of changes within a specified daily time frame). See "Setting Service Contract Feature Basics Options" on page 14.
- Configure **roles/permissions** for support reps and rep groups using Change functionality via the Support Representatives screen. See the online help for more information.
- Set up **email processing** and other notification features via the Email screen. See the online help for more information.
- To configure submission and display of Change records via a **mySupport** customer portal, go to mySupport | Portals. See the online help for more information.

Optional Customization

Use the following options under Options and Tools | Customize:

- Set up **category combinations** via the via the | Categories screen. A categorization structure of up to five levels can be configured; categorization is a key component of targeted knowledge searching, skill-based routing, and other features. Scripts can display when the associated category combination is selected to ensure that all relevant information is collected. You can search for other knowledge entries, incidents, problems, and changes based on the change categorization. See the online help for more information.
- Enable and customize **notifications** for Change-related events such as record saves, work history updates, routes, email updates, and closure. You can use or modify iSupport's default notifications or create new notifications. Use **rules** and **rule groups** to send notifications if rule conditions are met. See the online help for more information.
- You can create customized labels for the Standard, Normal, and Emergency **Change types**; see "Setting Up Custom Change Types" on page 8.
- Set up **custom fields** to include in the Change screen via the Custom Fields screen. Use custom text, keyword, and date fields to enter information specific to your company; an unlimited number of text, keyword, hyperlink, date, and date/time fields can be defined. You can require custom fields to be completed before a change is saved or closed, and associate custom fields with categories. See "Configuring Custom Fields" on page 18.
- Create customized labels for the Change **status levels** of Open, Closed, and Suspended via the Custom Status Labels screen. See "Defining Custom Status Labels" on page 17.

- Configure manual or automatically generated **custom numbers** for using the numbering system specific to your company. See “Defining Custom Numbers” on page 23.
- Define **impact and urgency values** that describe the number of users affected and the amount of time a resolution is needed and map to priority levels via the Impact and Urgency screen. You can set the default impact, urgency, and priority via the Feature Basics screen. Note: defined impact and urgency values are also used in Incident and Problem functionality. See “Defining and Mapping Impact and Urgency Values” on page 26.
- Define **Work History types** to create custom entries for support representatives to select to describe the work performed on a work item. See “Configuring Work History Types” on page 28.
- iSupport includes a default Change **screen layout**; go to Layouts to redesign it to include fields and tabs that are specific to your company. You can create different layouts to assign to support representative groups, customer groups, categories, change templates, and hierarchy templates. See “Configuring Screen Layouts” on page 29.

Optional Integration

- Configure **webhooks** for posting Change data to a web application. See “Configuring Webhooks” on page 34.

Optional Automation

Use the following options via Options and Tools | Automate:

- Create **templates** to populate fields for common and reoccurring changes. Templates automatically complete fields with defaults for a change’s category set, description/resolution, assignee, status, type, important dates, and/or priority. See “Configuring Change Templates” on page 35. Create hierarchy templates for tasks that have multiple activities; see “Configuring Change Hierarchy Templates for Workflow Tasks” on page 39. iSupport’s Service Catalog functionality enables customer requests of services, products, policies/procedures, etc. utilizing configured Change templates.
- Configure **rules** to send notifications, route, initiate approvals and web hooks, change field values, and more via the Rules screen. See “Configuring Rules and Rule Groups for Changes” on page 63.
- Configure **approval cycles** and associated notifications via the Approval Cycles screen. You can configure approval cycles consisting of serial or concurrent approvers, notifications, and statuses, and associate approval cycles with customers, companies, and categories. See “Configuring Approval Cycles” on page 56.
- Utilize the **Application Program Interface (API)** with Windows Communication Foundation services (Microsoft's web services) for access and integration with basic create, read, update, and delete operations for Change functionality. Contact iSupport Software for more information.

Administration

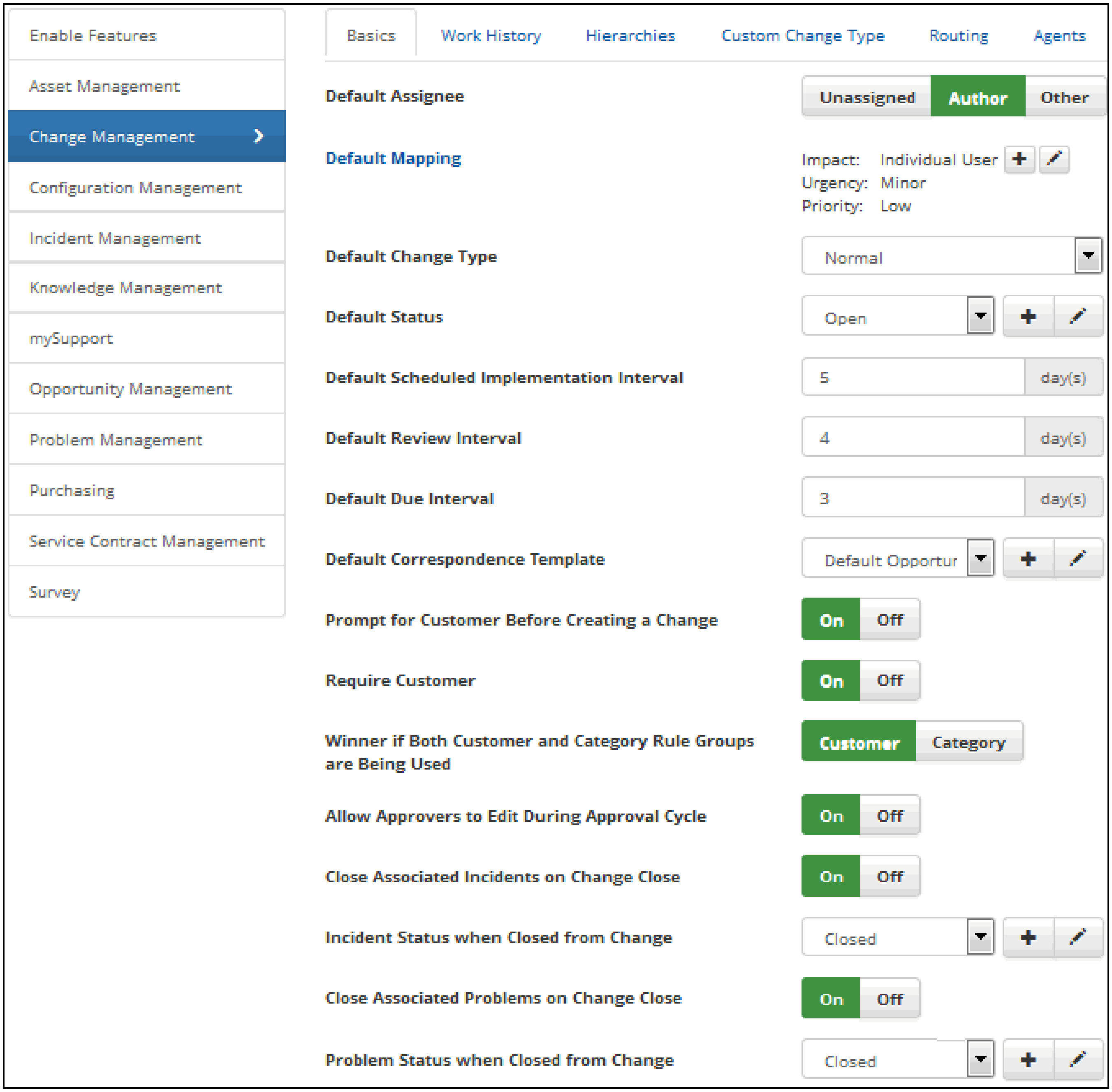
- If you need to **overwrite** fields on a saved incident, see “Using the Data Override Feature for Incidents, Problems, and Changes” on page 80.
- **Archive** Change records for database efficiency via the Options and Tools | Administer | Agents screen. See the online help for more information.

Setting Change Basics Configuration Options

The Change Basics screen enables you to set basic options such as closure of associated incidents and problems upon close of a change, defaults, and custom change type labels.

Completing the Basics Tab

Use the fields on the top half of the Basics tab to set miscellaneous configuration options.



Default Assignee/Select Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field.
- Author to assign newly-created Change records to the person who created the change.
- Other to designate a support representative to be assigned newly-created Change records.

Default Mapping - Click this link to select the Impact, Urgency, and Priority to display by default in the Impact, Urgency, and Priority fields in the Change screen. Use the Create New and View/Edit icons to access the Impact and Urgency Mappings screen.

Default Change Type - Select the change type to display by default in the Change screen. You can use the Custom Change Type tab to create different labels for the Standard, Normal, and Emergency change types.

Default Status - Select the Open status level to display by default in the Change screen. Use the Create New and View/Edit icons to access the Custom Status Labels screen.

Default Scheduled Implementation Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Scheduled Implementation field in the Change screen.

You can set up notifications to be sent to specified recipients prior to the Scheduled Implementation date and after the Scheduled Implementation date has been exceeded.

Default Review Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Review field in the Change screen.

You can set up notifications to be sent to specified recipients prior to the Review date and after the Review date has been exceeded.

Default Due Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Due field in the Change screen.

You can set up notifications to be sent to specified recipients prior to the Due date and after the Due date has been exceeded.

Default Correspondence Template - Select the correspondence template that will apply by default when a support representative initiates a correspondence via the Change entry screen. Correspondence templates that are active and enabled for the Change module will be available for this feature. Use the Create New and View/Edit icons to access the Correspondence Template screen.

Prompt for Customers Before Creating Change - Select Yes to display a customer selection dialog when a change is initially created.

Require Customer - Select Yes to require a customer to be selected before a Change record can be saved.

Winner if Both Customer and Category Rule Group Thresholds are Being Used - Rule groups can be associated with a customer and/or with a category combination. If both the customer and the category thresholds are pulled into a change, select the type that should take priority: the customer settings or the categorization settings.

Allow Approvers to Edit During Approval Cycle - Select Yes to enable support representatives designated as approvers (or those with Approval Override) to have access to all functionality except Status in records in an approval cycle. You can configure the Pending Change Updated notification to be sent when the Edited During Approvals event occurs; see “Creating Rules” on page 65 and “Configuring Approval Cycles” on page 56 for more information.

Close Associated Incidents on Change Close - Both the Incident and Change screens include options for associating incidents with a Change record. Select:

- Yes to automatically close any associated incidents when a Closed status is selected for a Change record. The text in the Results field will be used as default for the incident resolution, but a dialog will appear when the Change record is closed for editing it.
- No to retain the Open status for associated incidents.

Incident Status When Closed From Change - Select the status to assign to any associated incidents that are closed when a Change record is closed. Use the Create New and View/Edit icons to access the Custom Status Labels screen.

Close Associated Problem on Change Close - Both the Problem and Change screens include options for associating a Problem record with a Change record. Select:

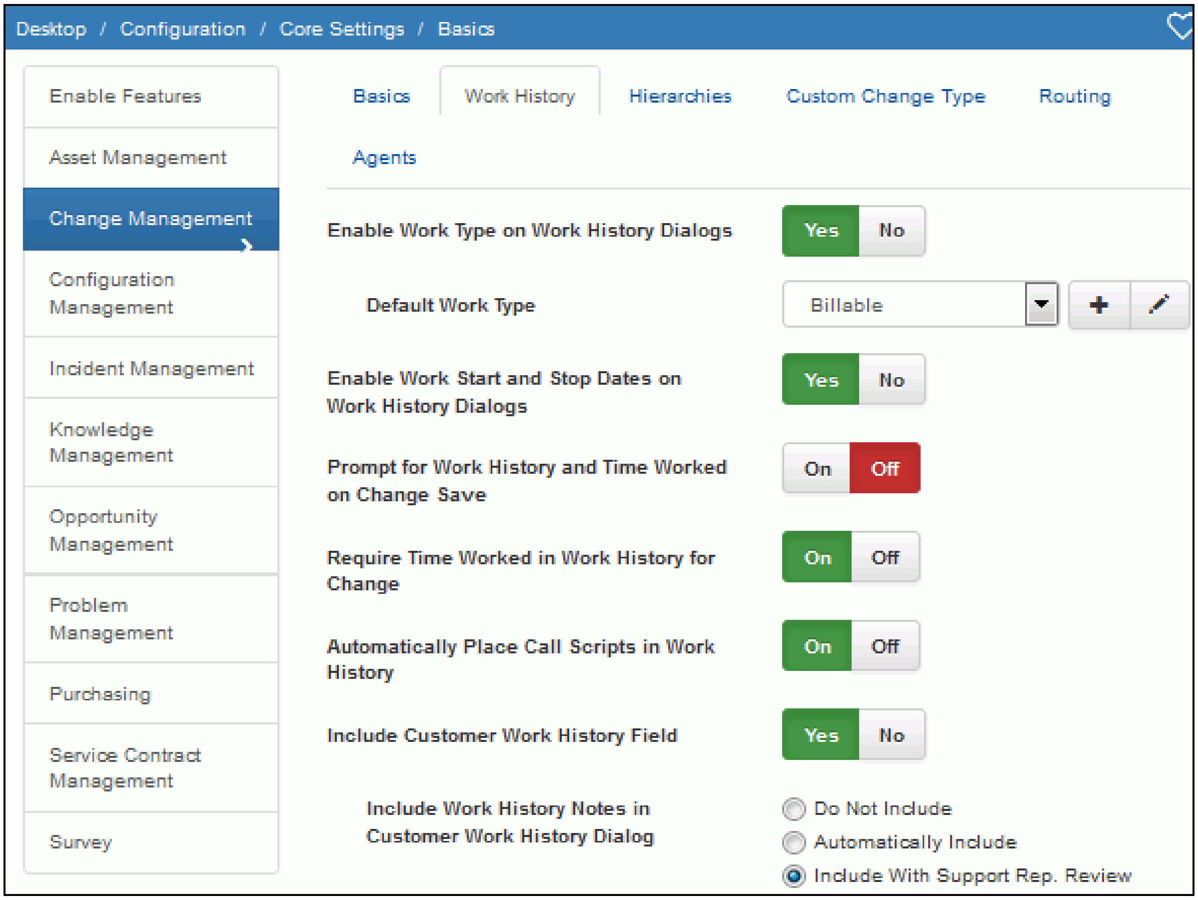
- Yes to automatically close the associated Problem record when a Closed status is selected for a Change record. The text in the Results field will be used as default for the Problem resolution, but a dialog will appear when the Change record is closed for editing it.

- No to retain the Open status for the associated Problem record when a Change record is closed.

Problem Status When Closed From Change - Select the status to assign to the associated Problem record that is closed when a Change record is closed. Use the Create New and View/Edit icons to access the Custom Status Labels screen.

Work History

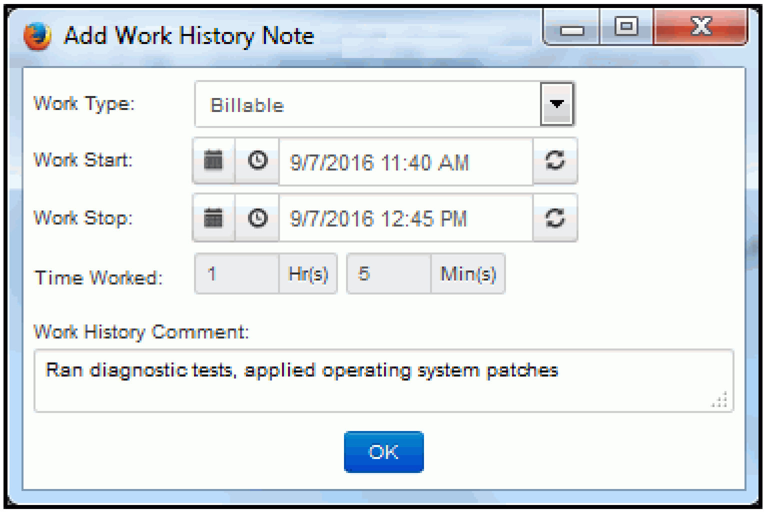
Use the Work History tab to set options for the Work History and Save dialogs in the Change screen.



Enable Work Type on Work History Dialogs - Select Yes to include a Work Type field in the Work History dialog in the Change screen.

Default Work Type - If the Work Type field is enabled, select the work type to appear by default in that field. Use the Create New and View/Edit icons to access the Work Types entry screen; see "Configuring Work History Types" on page 28.

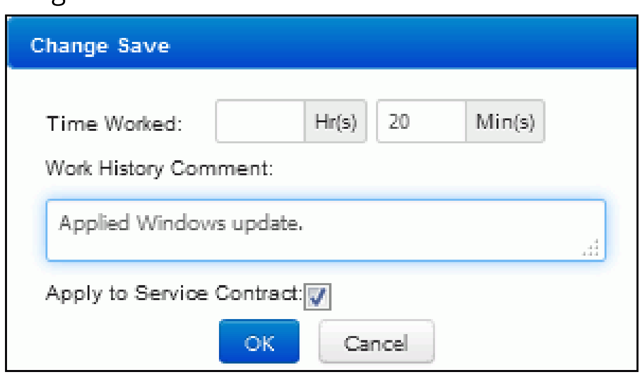
Enable Work Start and Stop Dates on Work History Dialogs - Select Yes to include Work Start and Work Stop fields in the Work History and Change Save dialogs in the Change screen.



The Work Start field defaults to the date and time the support representative loaded the work item. 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. For example, if a new Change record is opened at 1:00 PM, the support representative works with the customer for 30 minutes, and then clicks the Add Work history option or saves and displays 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.

Support representatives 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).

Prompt for Work History and Time Worked on Change Save - Select Yes to display the Save dialog every time a support representative saves a change.



Require Time Worked in Work History for Change - Select Yes to require an entry in the Work History dialog Time Worked field in the Change screen before the record can be saved.

Automatically Place Call Scripts in Work History - Select Yes to, when a call script is used, automatically include the entire call script in the Work History field. This will also make the call script editable when it appears. Call scripts are entered and associated with categories in the Category entry screen. If you select No in this field, the call script will not be editable.

Include Customer Work History - Select Yes to include a field on the Change screen that includes work history notes for display when customers view their changes on the mySupport portal. The field will include basic change events, and can include:

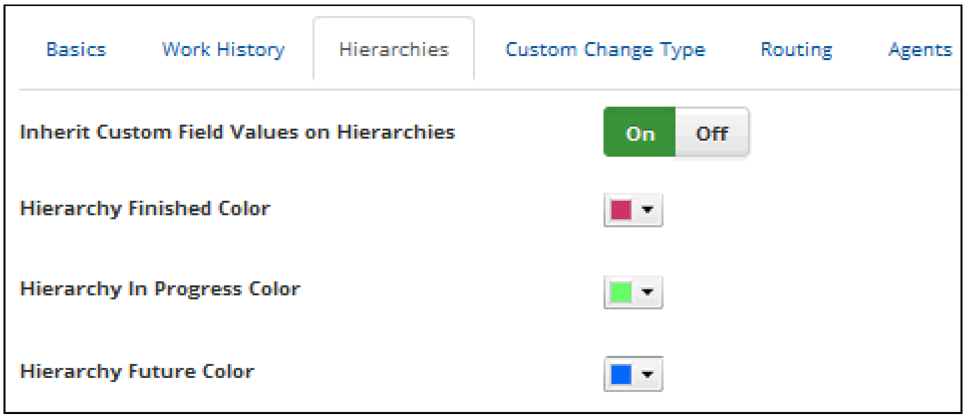
- A Customer Work History dialog
- The contents of the Work History field, without review by the support representative
- The contents of the Work History field, edited by a support representative.

Include Work History Notes in Customer Work History Dialog - This field appears if including the Customer Work History field. Select:

- Do Not Include to prevent Work History field entries from inclusion in the Customer Work History field. Only information on basic change events will be included.
- Automatically Include to fill the Customer Work History field with the contents of the Work History field, without review by a support representative.
- Include With Support Rep. Review to fill the Customer Work History field with the contents of the Work History field and enable the support representative to edit it before including it in the Customer Work History field.

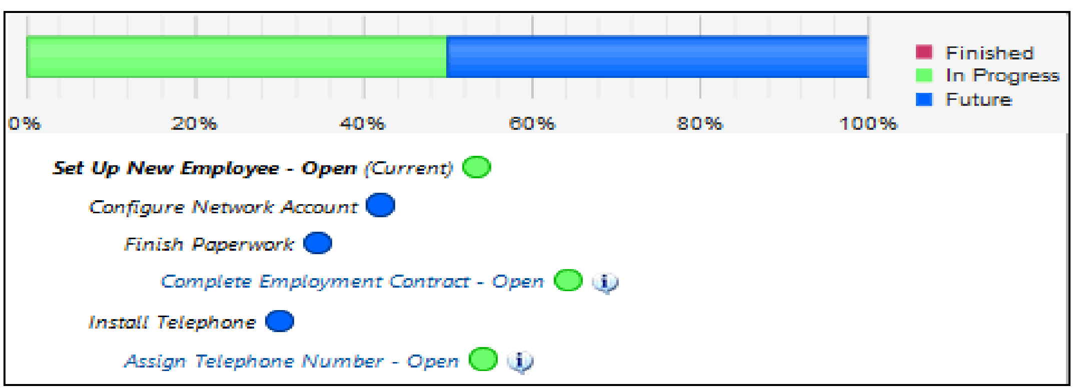
Configuring Options for Change Hierarchies

Use the Hierarchies tab to set options for changes created by hierarchy templates



Inherit Custom Field Values on Hierarchies - Select Yes to, when custom fields are associated with a category or change, pass the values in those fields to changes created by hierarchy templates. See "Configuring Custom Fields" on page 18 for information on configuring custom fields; see "Configuring Change Hierarchy Templates for Workflow Tasks" on page 39 for information on configuring change hierarchy templates.

Hierarchy Finished/In Progress/Future Color - Select the colors for the dot icons and portions of the graphic in the Related Hierarchy field that represent the percentage of work that has been completed, is in progress, and is pending due to dependencies.



Setting Up Custom Change Types

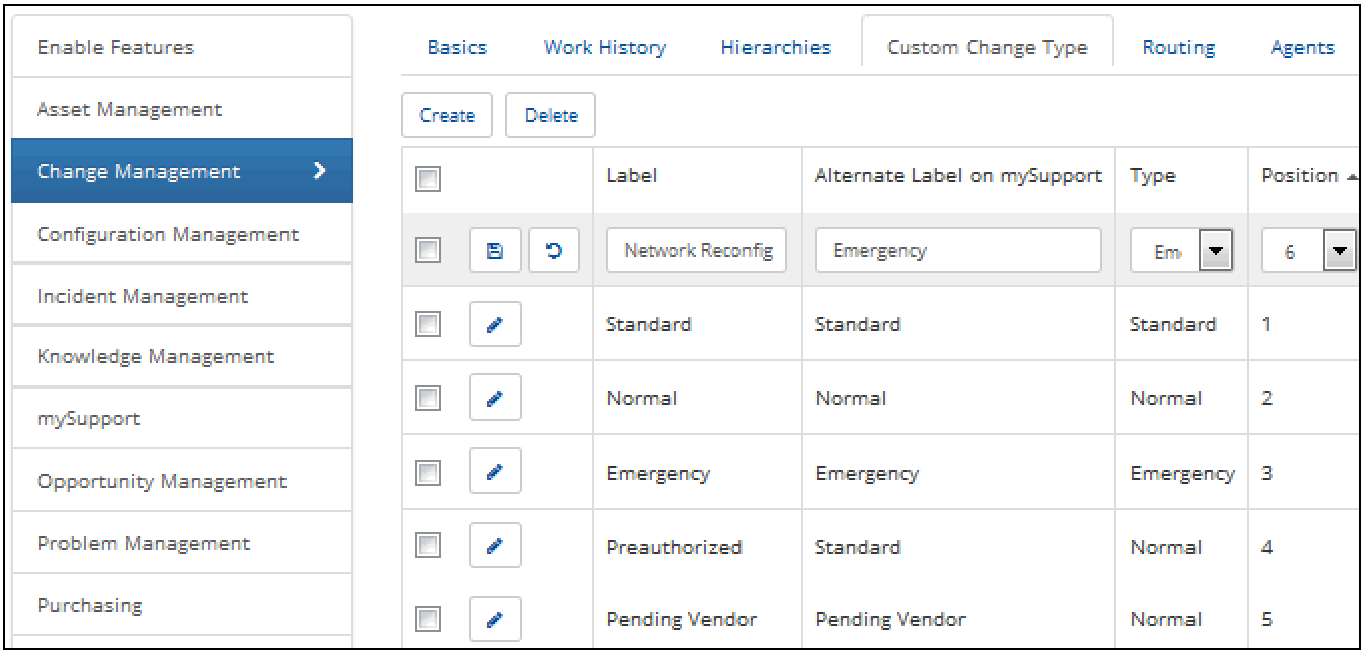
Use the Custom Change Types tab to create different labels for the Standard, Normal, and Emergency change types.

According to ITIL, change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.

- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

To define a custom change type, click the Add link on the Custom Change Type tab in the Change Basics screen.



Label - Enter the name for the type to appear as a selection in the Change screen and in views on the Desktop.

Alternate Label on mySupport - Enter the change type label to appear on the mySupport portal.

Type - Select the basis for the custom type label: Standard, Normal, or Emergency.

Position - Enter the number for the position of the status in the Type field in the Change screen. Position one will be listed first, position two will be listed second, and so on.

Configuring Routing

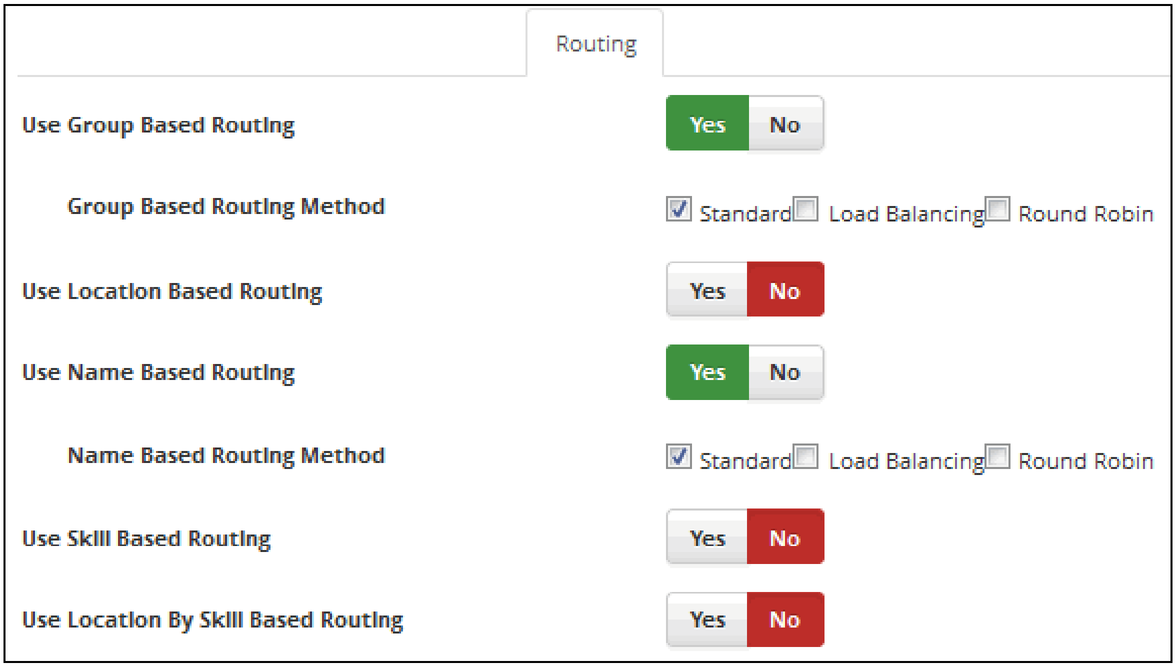
The routing setup process includes:

- On the Routing tab, select the routing methods and enter skill levels and routing weights.
- If using location-based routing, set up locations in the Location screen.
- If using skill-based routing, set up categories in the Category entry screen and designate skills for support representatives in the Category screen or Support Representative skills screen.
- If applicable, set up notifications in the Rule screen.

To become available for routing, a support representative can:

- Select Yes in the Available for Routing field in their Support Representative record.
- Click the In/Out link next to the name on the Desktop menu.

Use the Routing tab in the Basics screen to specify the type of routing to be used, the skill level labels, and load-balanced routing weights. If you enable more than one routing method, the support representative can choose the method when the change route is initiated.



All routing methods can also include load balancing, which involves weights based on change priority.

- For group, location, or name based routing with load balancing, the available support representative for the method with the lightest overall workload will be selected. (For example, if using group-based routing, the available support representative within the selected group with the lightest overall workload will be selected.
- For skill-based routing with load balancing, after the categorization level is selected, 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.

  If a support representative has worked with a change and the change 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 change. If all support representatives have the same weight for their changes, a random choice is selected for the assignee.

Note that rules can route changes via load-balancing or the round robin method.

Use Group Based Routing - Select Yes to enable changes to be routed to available support representatives that are set up in groups. In the Change screen the support representative will select a group and then an assignee from a list of all available support representatives in that group. Use the Group screen to set up groups and the Support Representative screen to assign support representatives to groups. A support representative can be a member of more than one group.

Group Based Routing Method - This field appears if using group based routing. Select:

- Standard - enables the support representative to select a group and then an assignee from a list of all available support representatives in that group. Groups are designated for support representatives in their Support Representative record.
- Load Balancing - allows the system to select a support representative based on current open change statistics, including weights based on change priority. The available support representative within the selected group with the lightest overall workload will be selected.
- Round Robin - the support representative in the group who was assigned a change using the round robin method on the oldest date and time is selected.

Use Location Based Routing - Select Yes to enable location based routing, which enables the support representative to select a location and then an assignee from a list of all available support representatives in that location. Locations are specified for support representatives in their Support Representative record or in the Location configuration screen. You can associate support representative locations with customer groups for location-based routing of changes submitted via the mySupport portal and email.

Location Based Routing Method - This field appears if using location based routing. Select:

- Standard - allows the support representative to select from a list of all available support representatives listed by the location entered in support representative profiles.
- Load Balancing - routes changes based on current open change statistics, including weights based on change priority. The available support representative within the selected location with the lightest overall workload will be selected.
- Round Robin - the support representative in a selected location who was assigned a change using the round robin method on the oldest date and time is selected.

Use Name Based Routing - Select Yes to enable name based routing, which enables the support representative to select an assignee from a list of all available support representatives regardless of group.

Name Based Routing Method - This field appears if using name based routing. Select:

- Standard - allows the support representative to select from a list of all available support representatives.
- Load Balancing - routes changes based on current open change statistics, including weights based on change priority. The available support representative with the lightest overall workload will be selected.
- Round Robin - the support representative who was assigned a change using the round robin method on the oldest date and time is selected.

Use Skill Based Routing - Select Yes to enable skill based routing, which uses the change categorization to select qualified support representatives. After a support representative classifies the change and selects skill-based routing, the category levels selected for the change will appear; the support representative will select the level of categorization that exactly matches the categorization for which support representative skills should be searched. The support representative(s) that have those skills configured in their profile will appear for selection.

Skill levels are associated with category combinations in the Support Representative screen.

Skill Based Routing Method - This field appears if using skill based routing. Select:

- Standard - allows the support representative to select the level of categorization that exactly matches the categorization for which support representative skills should be searched. Support representatives with that categorization in their Support Representative record would be displayed for assignment.
- Load Balancing - selects assignees based on the change categorization and current open change statistics, which include weights based on change priority. The support representative selects the level of categorization for which support representative skills should be searched, and 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.
- Round Robin - allows the support representative to 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 change using the round robin method on the oldest date and time is selected.

Routing begins with skill based routing level one, and then advances to the next skill based level. If multiple support representatives have the same skill level, the load balanced routing weights are used.

Use Location By Skill Based Routing - Select Yes to enable location by skill based routing, which routes to support representatives with matching skills at a certain support representative location. You can use location by skill based routing with:

- mySupport-submitted changes. The location selected by the mySupport customer takes precedence, then the support representative location associated with the customer's primary group, then the location associated with the company's primary group. If none are found, the default location (specified in the mySupport Portals Configuration screen) is used.
- Email-submitted changes. The customer's profile will be searched for a primary group and associated support representative location. If there is no associated location, the customer's company record is searched for a

primary group and associated location. If none are found, the location in the Default Location field on the Email Processing Basics tab will be used.

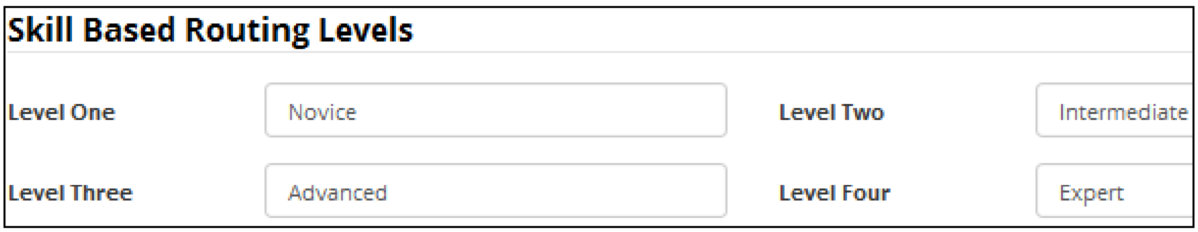
Once a location is determined, all support representatives in that location will be searched for matching skills.

Location By Skill Based Routing Method - This field appears if using location by skill based routing. Select:

- Standard - allows the support representative to select a location and the level of categorization that exactly matches the categorization for which support representative skills should be searched.
- Load Balancing - routes changes based on current open change statistics, including weights based on change priority. The support representative in the selected location and category level with matching skills and the lightest workload is selected.
- Round Robin - allows the support representative to select a location and 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 change using the round robin method on the oldest date and time is selected.

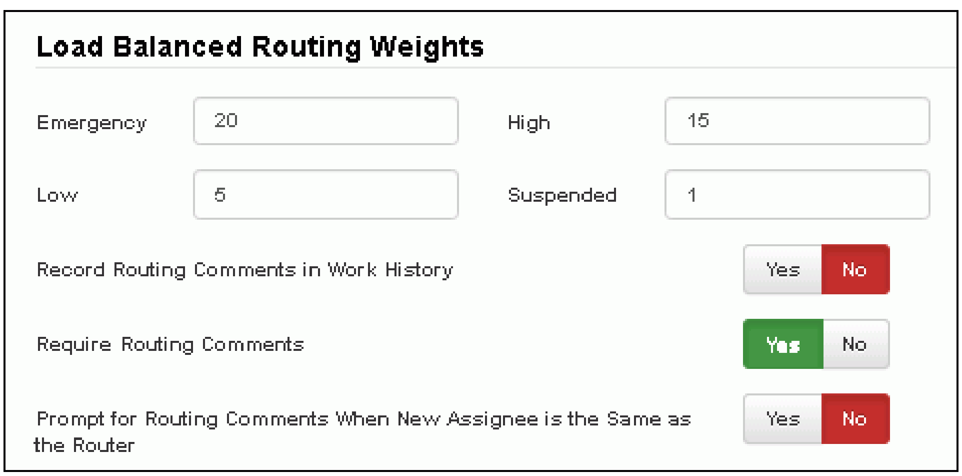
Skill-Based Routing Levels

Enter the labels (for example, Novice) to display for skill levels one through four.



Load Balanced Routing Weights

Load balanced routing involves weights based on change priority. As discussed in the following example, a support representative’s workload is calculated by multiplying the number of changes at a certain priority level by the weight assigned to that priority level.



For example, one support representative has two changes at emergency priority. A second support representative may have one change at medium priority and two at low priority. If the emergency change weight is 20, the medium change weight is 10 and low change weight is 5, the support representative's workloads will be calculated as follows:

- First support representative = Two changes at emergency priority (2 X 20 = 40).
- Second support representative = One change at medium priority and two at low priority (1 X 10) + (2 X 5) = 20.

Even though the second support representative has three changes and the first has two, the second support representative's workload is less.

Use the fields in the Load Balanced Routing Weights section to enter weights for priority levels and changes with a suspended status. To weight all changes the same regardless of their priority, enter a value of 1 for all five change weight fields.

Routing Comment Options

When a change is routed, the Routing Comment dialog appears for the support representative 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.) The following configuration options affect the routing comments.

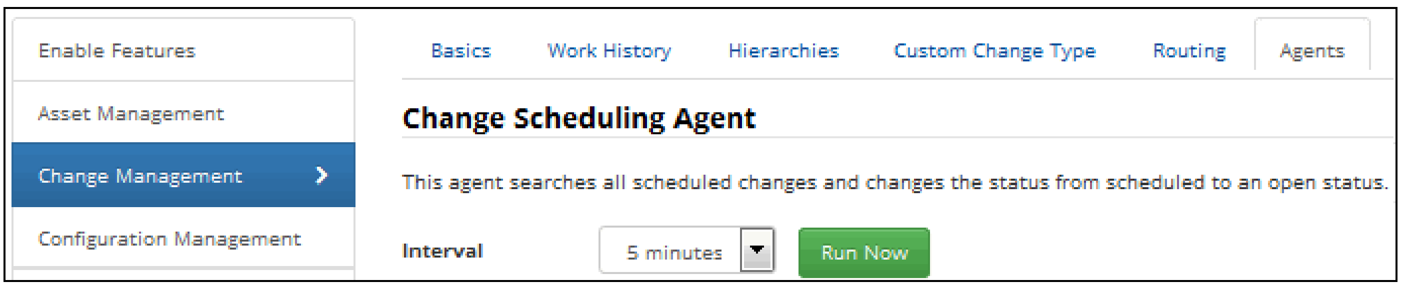
Record Routing Comments in Work History - Select Yes to, when a routing comment is entered, automatically include the comment in the Work History field.

Prompt for Routing Comments When New Assignee is the Same as the Router - Select Yes to display the prompt for routing comments if the new assignee is the same as the representative initiating the route. The Route Comment prompt will not appear if no notifications are enabled for the routing event.

Require Routing Comments - Select Yes to require a support representative to enter routing comments after routing a change.

Enabling the Change Scheduling Agent

Use the **Change Scheduling Agent Interval** field on the Agents tab to select the number of minutes in the interval for the Change Scheduling agent to check all scheduled changes for start dates/times and, if the specified date/time is reached, changes the status from Scheduled to an open status. Change generation times are also checked and change requests are created if the specified time is reached. You can click the Run Now button to execute an agent immediately.

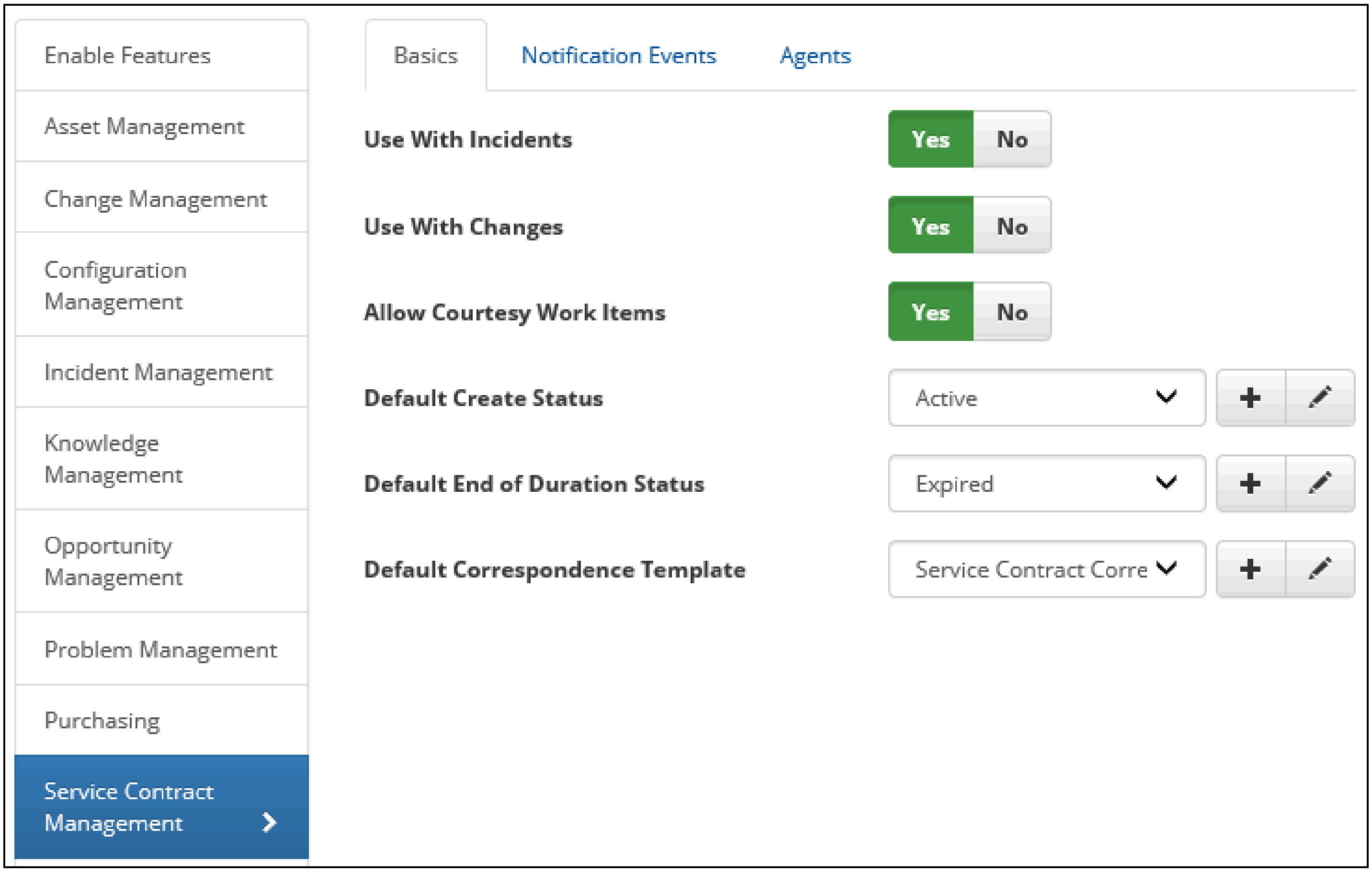


Setting Service Contract Feature Basics Options

The Service Contract Basics screen enables you to enable use of service contracts with incidents and changes, courtesy work items, Service Contract entry screen defaults, and notifications.

Completing the Basics Tab

Use the Basics tab to enable use of service contracts with incidents and changes, courtesy work items, and Service Contract entry screen defaults.



Use With Incidents - Select Yes to enable Service Contract functionality in the Incident entry screen.

Use With Changes - Select Yes to enable Service Contract functionality in the Change entry screen.

Allow Courtesy Work Items - A courtesy work item is an incident or change that does not count against the service contract in effect for a customer, company, or asset; it is created for an incident or change if the Mark This a Courtesy Work Item checkbox is enabled in the Select Service Contract dialog that appears after a customer is selected.

Select Yes to include the Mark This a Courtesy Work Item checkbox in the dialog that appears for selecting a service contract in the Incident and/or Change screens.

Default Create Status - Select the status level to display by default when a service contract is created. Use the Create New and View/Edit icons to access the Custom Status Labels screen; see "Defining Custom Status Labels for Service Contracts" on page 506 for more information.

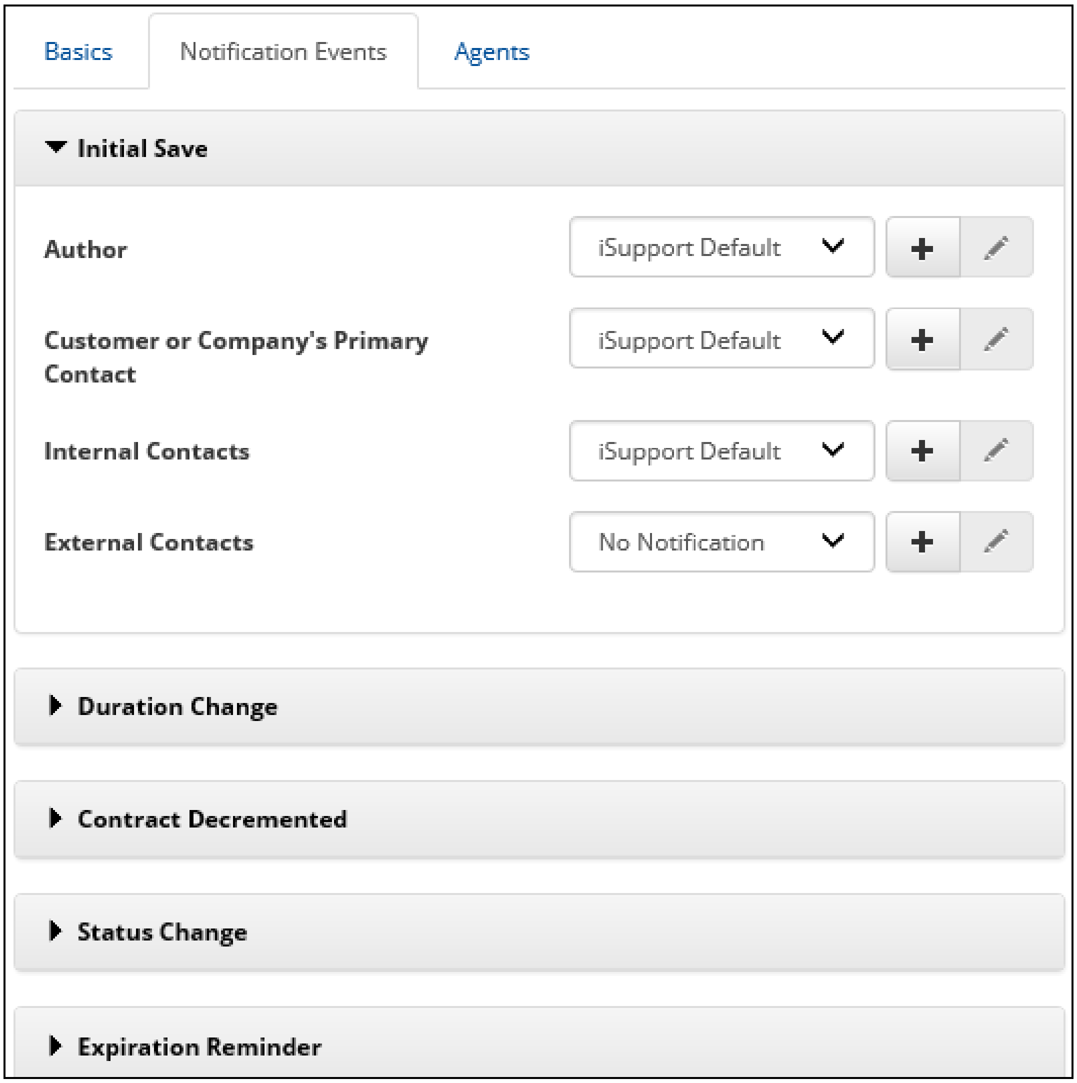
Default End of Duration Status - Select the Expired status level to assign to the contract by default when the date in the Duration End field is reached. Use the Create New and View/Edit icons to access the Custom Status Labels screen; see "Defining Custom Status Labels for Service Contracts" on page 506 for more information.

Default Correspondence Template - Select the correspondence template that will apply by default when a support representative initiates a correspondence via the Service Contract entry screen. Correspondence templates that are active and enabled for the Service Contract module will be available for this feature. Use the Create New + and View/Edit icons to access the Correspondence Template screen.

Setting Up Notifications for Service Contract Events

You can configure notifications to be sent when service contract events occur such as record creation, a change to the duration of the contract, an incident or change is counted against the contract, a support representative makes a change in the Status field, or an expiration reminder is sent.

The notifications on this screen are used as defaults for the Notification Event field in the Service Contract entry screen. Use the fields below to enable specified notifications to be sent to specified recipients for Service Contract events. You can select the default notification or a predefined custom notification; use the Create New + and View/Edit icons to access the Custom Notifications screen. Note that these settings will be used if nothing is selected in the Notification Event section in the Service Contract entry screen and no template is selected. Notifications are sent according to the schedule of the Service Contract agent; see "Enabling the Service Contract Agent" on page 16.



Initial Save - Select the recipients and notifications to be sent when a service contract is initially saved.

Duration Change - Select the recipients and notifications to be sent when an entry is changed in the Duration fields for a service contract and the record is saved.

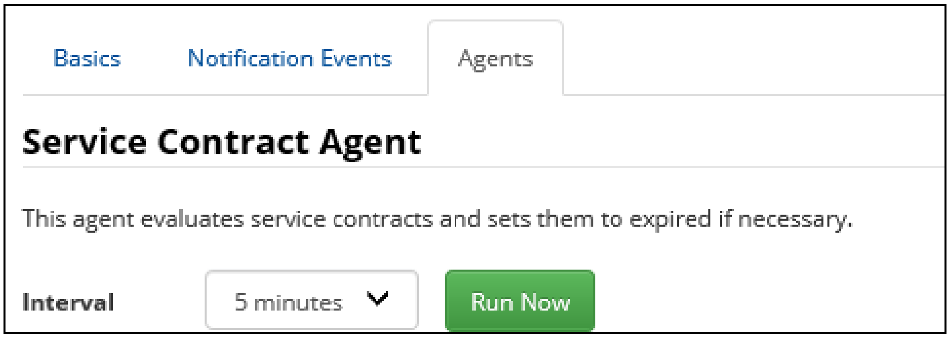
Contract Decremented - Select the recipients and notifications to be sent when an incident or change is counted against a service contract.

Status Change - Select the recipients and notifications to be sent when an entry is made in the Status field for a service contract and the record is saved.

Expiration Reminder - Select the recipients and notifications to be sent when a contract is about to expire.

Enabling the Service Contract Agent

In the Service Contract Agent Interval field, select the number of minutes in the interval for the Service Contract agent to check all service contracts for counts and/or end dates/times; if the specified total count and/or end date/time is reached, the status changes to an Expired status. You can select Daily to run the agent every day at a specified start time.



Defining Custom Status Labels

Use the Options and Tools | Customize | Custom Status Labels screen to create custom labels for iSupport's work item status levels. These labels will be included in views and reports, and will appear for selection in work item screens. You can also create labels that will appear to customers using mySupport.

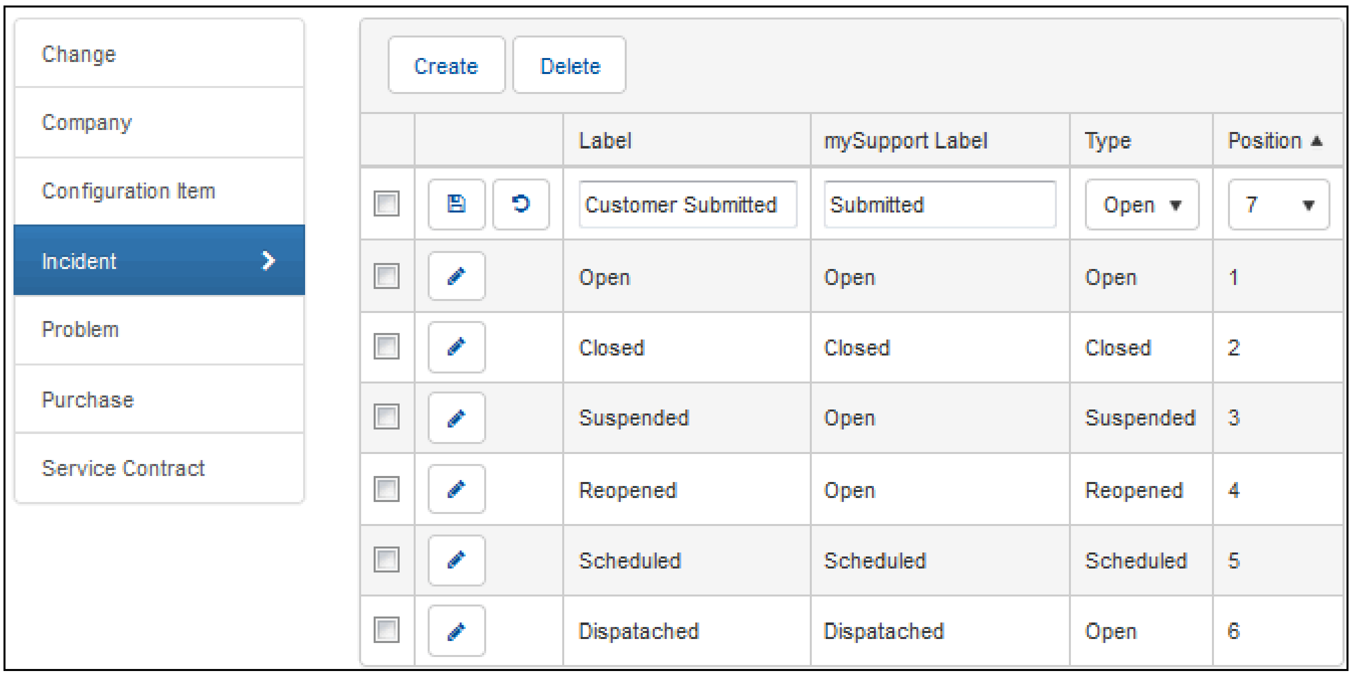
If you have the Incident Management Edition, you can define labels for the following work item types:

- Incident: Open, Closed, Suspended, Scheduled, Reopened
- Service Contract: Active, Inactive, Suspended, and Expired.

If you have the Service Desk Edition, you can define labels for the following of work item types:

- Change: Open, Closed, Suspended
- Problem: Open, Closed
- Purchasing: Open, Closed

Note that there must be at least one status label of each type and only one Reopened and Scheduled type.



Label - Enter the name for the status.

Alternate Label on mySupport - Enter the status label to appear on the mySupport portal. Enable the status label via the <*work item type*> Display tab in the Core Settings | mySupport | Portals | Options configuration screen.

Type - Select the basis for the custom status label: Open, Suspended, Reopened, or Closed. Note: Since there can only be one Reopened status label, it will not be available for new status labels.

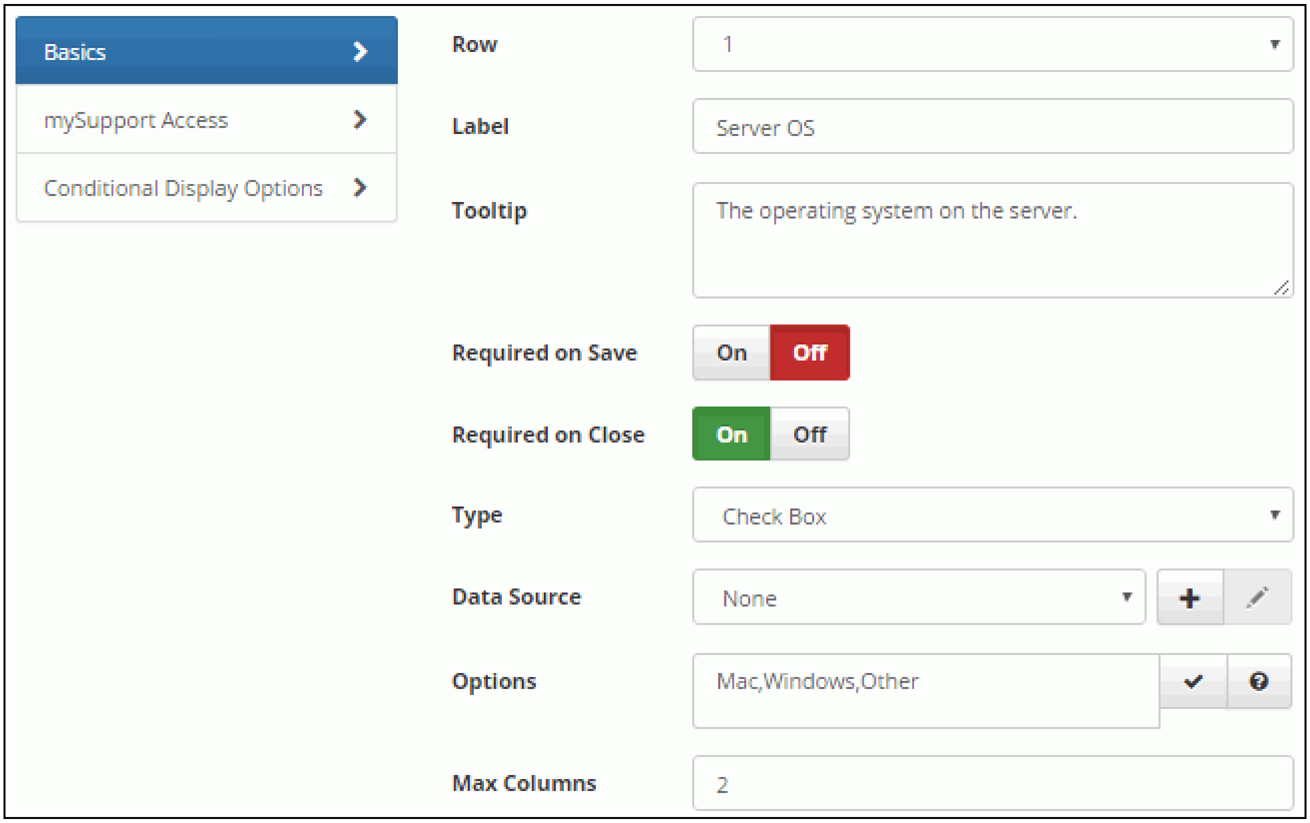
Position - Select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)

Configuring Custom Fields

To define fields for entering information specific to your company, go to Options and Tools | Customize | Custom Fields. An unlimited number of text, keyword, hyperlink, date, selection, and date/time fields can be defined. You can do the following with custom fields:

- Require custom fields to be completed before a work item is saved and/or closed
- Configure display based on defined conditions, and pull from a data source
- Map to a SQL data source and populate and synchronize options for list-type custom fields
- Use rules to set a custom field value
- Configure custom fields to appear when an associated asset type, CMDB type (SD Edition)

Note that in addition to these settings you can use the Category entry screen to enter custom fields that will appear only when a category is selected in a work item screen, and use the Asset Type configuration screen to enter custom fields that will appear only when an asset type is selected.



Row - Enter the row number for the position of the field. Row one will be the first field, row two will be located under the first field, and so on.

Label - Enter the label for the custom field.

Tooltip - Enter the text to display when a user hovers over the field with the cursor.

Required on Save - Select On to require the field to be completed before the record can be saved. Note: If an inbound email rule uses an auto-close incident template and a required custom field does not have a default value, the required custom field will not have a value in the closed incident.

Required on Close - Select On to require the field to be completed before a Closed status can be selected in a work item.

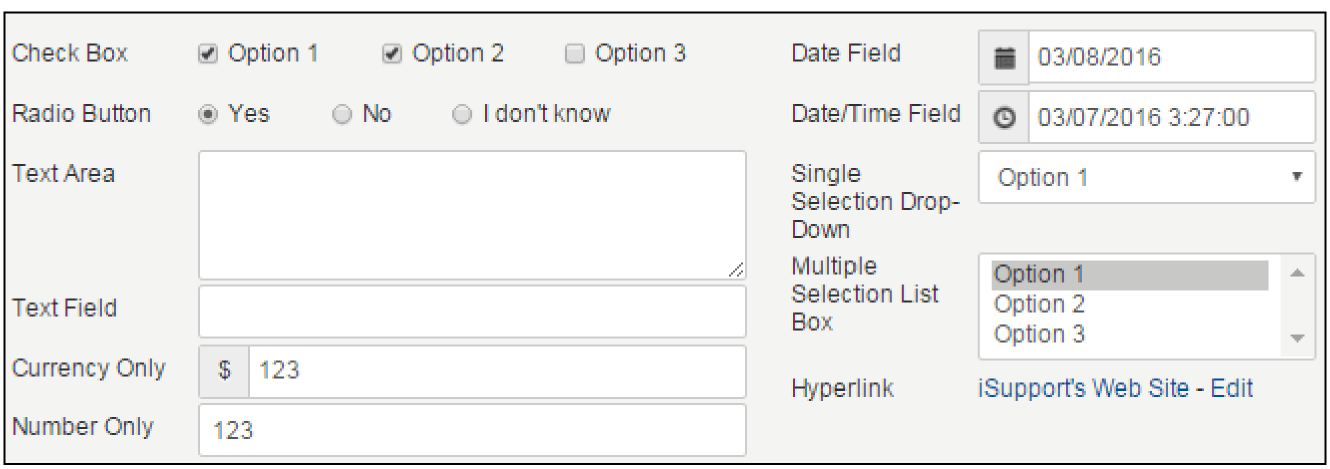
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see “Pulling From a Data Source” on page 21 for more information.

- A **Check Box** field enables multiple selections; use the Max Columns field to enter the number of check boxes to appear before a scroll bar is used.
- A **Currency** field displays a dollar sign next to the field and allows entry of the numbers 0 through 9, a decimal point, and two values after the decimal point. The dollar sign symbol that precedes a currency custom field is controlled by the server's default language, but you can override it via a setting in the web.config file (located in the directories in which the Desktop, mySupport portal, and Survey functionality are installed). The following tag in the web.config file defines globalization settings: <globalization requestEncoding="utf-8" responseEncoding="utf-8"/>

  You can add a culture/language name setting to this tag to override the currency symbol; in the example below, *culture="en-GB"* was added to change the dollar sign symbol to the English (United Kingdom) pound symbol. <globalization requestEncoding="utf-8" responseEncoding="utf-8" culture="en-GB"/>

  Note that the settings in the web.config file should be updated only as directed (via this guide or iSupport Technical Support); failure to do so may result in data loss or corruption. See http://msdn2.microsoft.com/en-us/library/system.globalization.cultureinfo.aspx for more information on defined culture settings.
- A **Date** field enables entry or selection of a date in MM/DD/YY format; a **Date Time** field enables entry or selection of a date (MM/DD/YY) and time. To disable manual entry in Date and Date Time fields and require the user to select from the calendar popup, select Yes in the Disable Manual Entry of Date Time Custom Fields field on the Advanced tab in the Custom Fields screen.
- A **Hyperlink** field enables you to specify default text and a URL to appear in the field; the user can change those entries. You can also leave the field blank and allow the user to enter the default text and URL.
- A **Multiple Selection List Box** field enables the user to select multiple entries in a list. Use the Max Rows field to enter the number of selections to appear before a scroll bar is used.
- A **Number Only** field enables entry of the numbers 0 through 9 and a decimal point.
- A **Radio Button** field enables only one selection; use the Max Columns field to enter the number of radio buttons to appear before a scroll bar is used.
- A **Single Selection Drop-Down** field enables selection of one item in a list.
- A **Text Area** field enables text characters to be entered in a resizable field.
- A **Text** field enables text to be entered in a one-line field.
- A **Type Ahead** field initiates a search of matching options after a few characters are typed. This custom field type is only used for fields that are linked with a data source.

Examples are shown below.



Options - This field displays when creating a radio button, checkbox, multiple selection list box, or single selection drop-down. Enter or paste items into this field; separate each value with a comma or return and click the Commit Items ✔ icon when finished. Select items to specify defaults and drag items to change the order. Options can be populated by and synchronized with a SQL data source; see "Pulling From a Data Source" on page 21 for more information.

Default Value - Enter a value to appear as an option in the custom field by default.

- To display the current date, enter **@today**
- To display the date a specified number of days after the current date, enter **@today+n** (where *n* is the number of days to add after today's date)
- To display the date a specified number of days before the current date, enter **@today-n** (where *n* is the number of days to subtract from today's date)

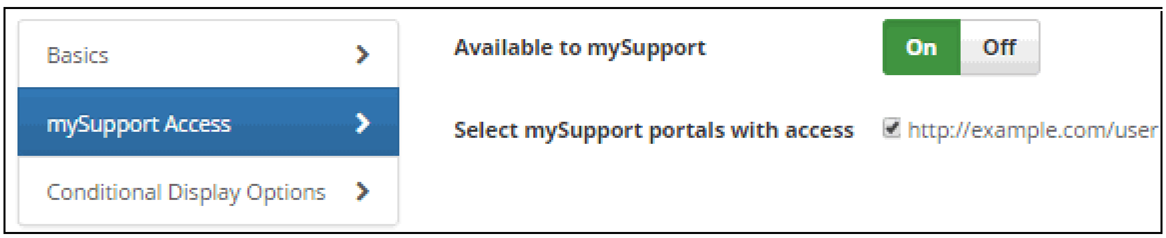
Max Columns/Max Rows - For Check Box and Radio Button type fields, enter the maximum number of columns to display (the fields will wrap to multiple rows); for a Multiple Selection List Box type field, enter the maximum number of rows to display (causing a scroll bar to appear).

To delete a custom field, click the row number and then click the Delete link. To delete multiple custom fields, select the fields and click the Delete link. To edit a custom field, click the label link.

mySupport Access Options

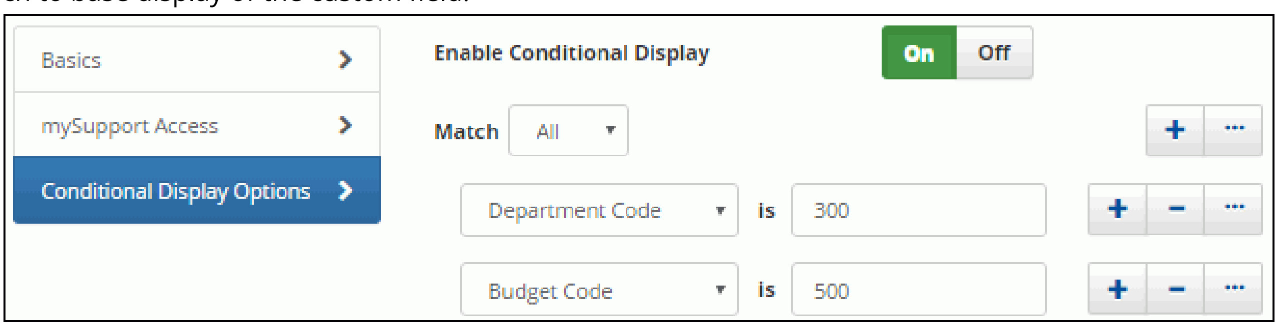
Available to mySupport - Select On to enable the field to appear on a mySupport portal.

Select mySupport Portals with Access - If the mySupport Access field is enabled, select the predefined mySupport portal interfaces on which the custom field can appear. Note: If custom fields are associated with more than one level of a selected category set, the fields for all levels will display.



Conditional Display Options

Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.

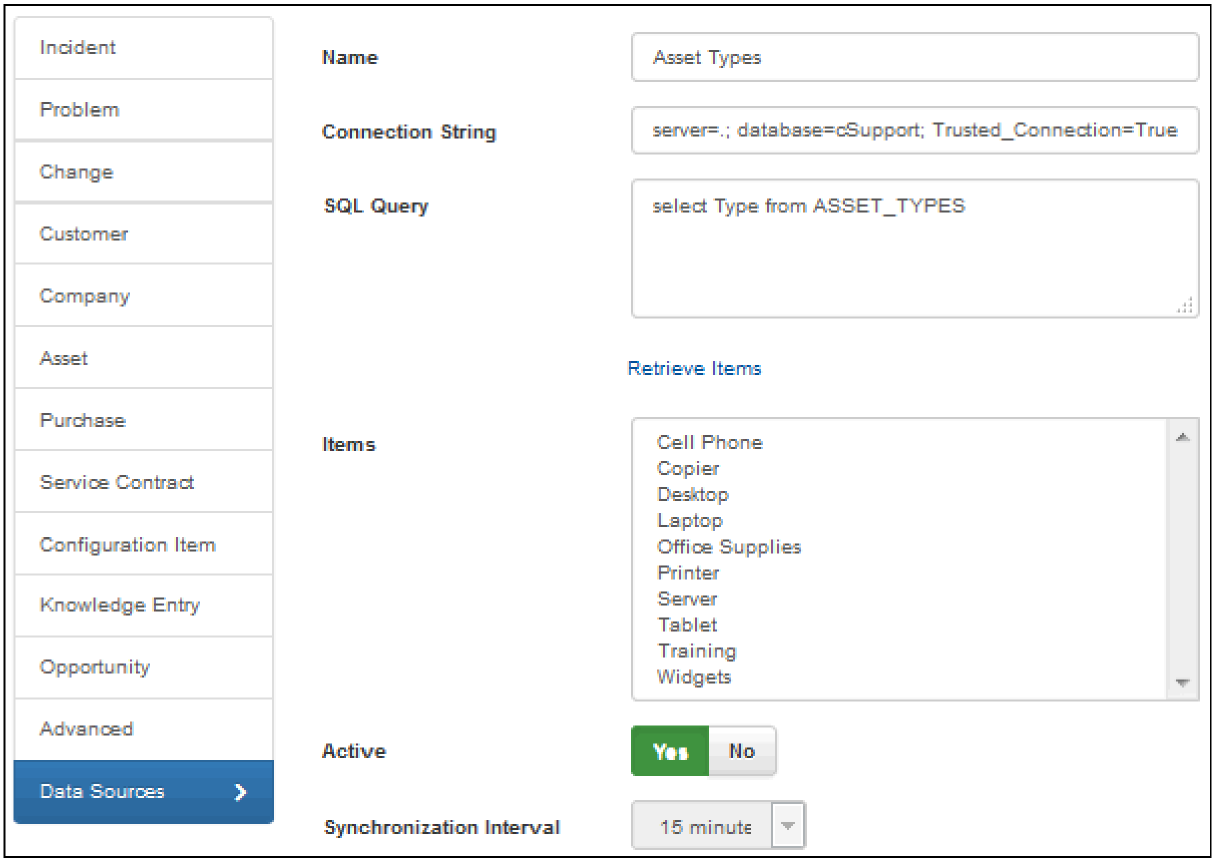


Use the Match <*All/Any*> field to specify whether you want **every** <*field*> is <*value*> search condition to be met, or **any** configured condition to be met. Use the Add Condition + and Remove Condition − icons to display and remove a <*field*> is <*value*> search condition. Click the Add Condition + icon if you wish to include another condition. You can use the Add Condition Group ··· icon to put a set of search conditions to be evaluated together in a group.

In this example, the field will appear if the value in Department Code custom field is 300 and the value in the Budget Code custom field is 500.

Pulling From a Data Source

You can map to a SQL data source and populate and synchronize options for list-type custom fields. Use the Data Sources tab in the Custom Fields screen to create a custom field data source definition, enter a connection string and SQL query, and specify the synchronization interval.



Name - Enter a name for the SQL Server source definition. This name will appear in the list that can be selected in the Data Source field in the Custom Field Definition dialog (if a list-type format is selected in the Type field).

Connection String - Enter the connection string for accessing the source database.

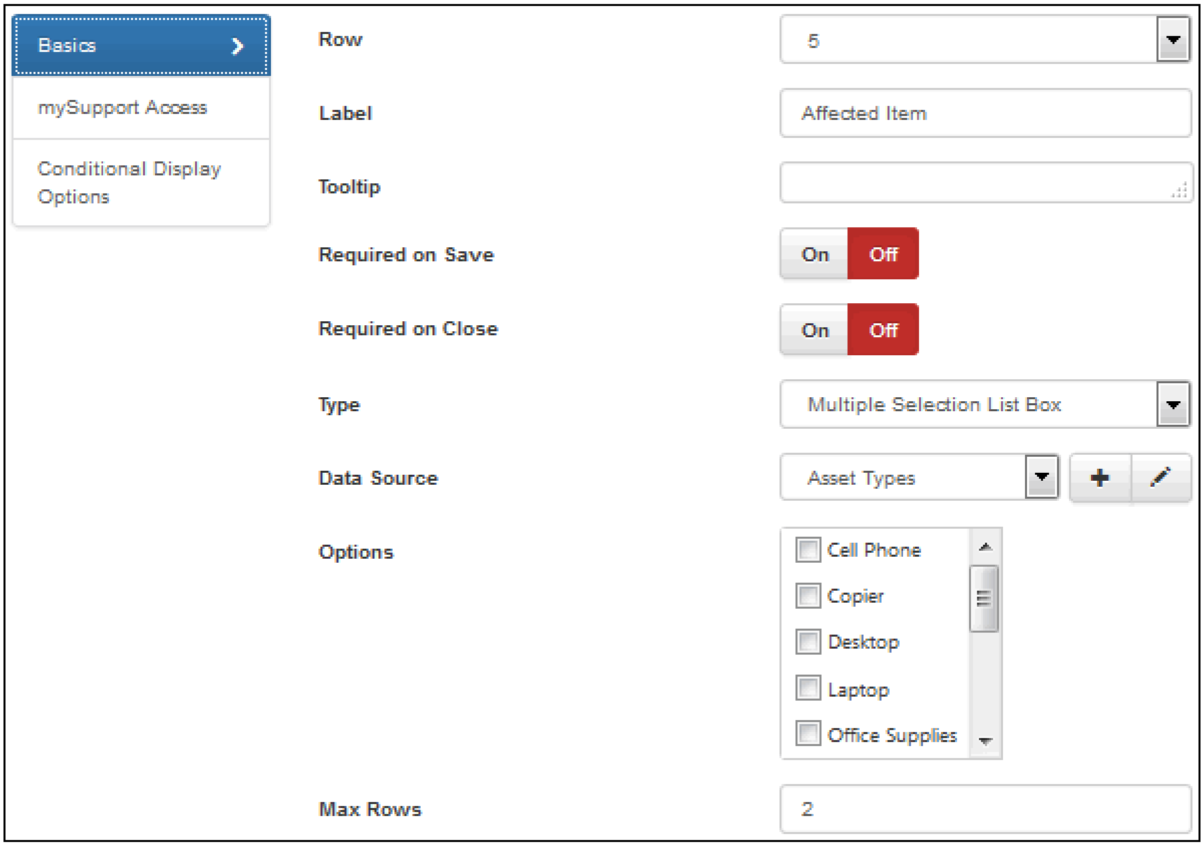
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Click the Retrieve Items button to populate the Items field using this string.

Active - Select Yes to enable synchronization and update the Options list for a custom field with the information in the SQL source database.

Synchronization Interval - Select the number of minutes in the interval for the synchronization to be performed.

Using the Data Source for a Custom Field

After saving, the custom field data source definition will be available for selection in the Custom Field Definition dialog. The Options field will be populated and will not be editable after synchronization.



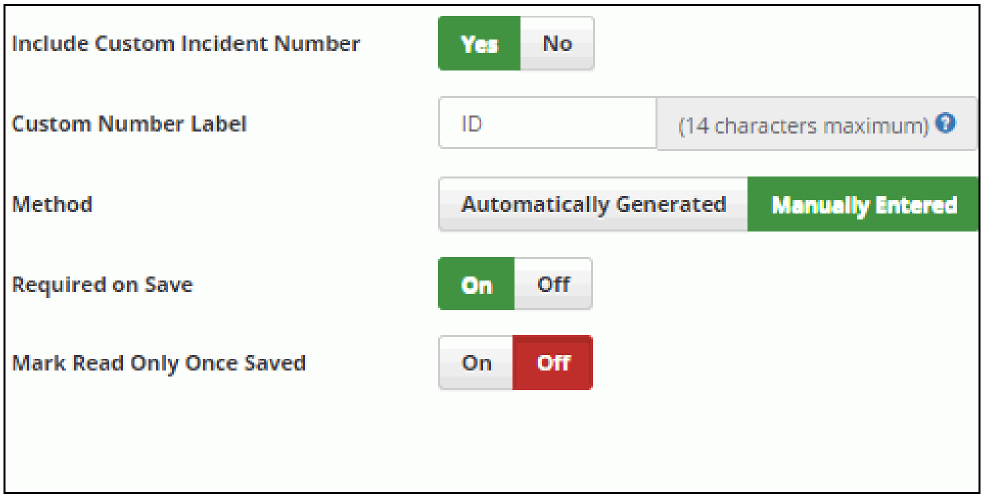
Defining Custom Numbers

You can include a field on the Incident, Problem, Change, Service Contract, and Purchase Request screens for entering a custom number, or an automatically generated number consisting of a prefix, suffix, and sequence that you configure. The number can be up to 15 characters.

The Custom Number configuration fields appear after selecting Yes in the Include Custom <record type> Number field. There are two methods for configuring custom numbers: a manually entered option or an automatically generated option.

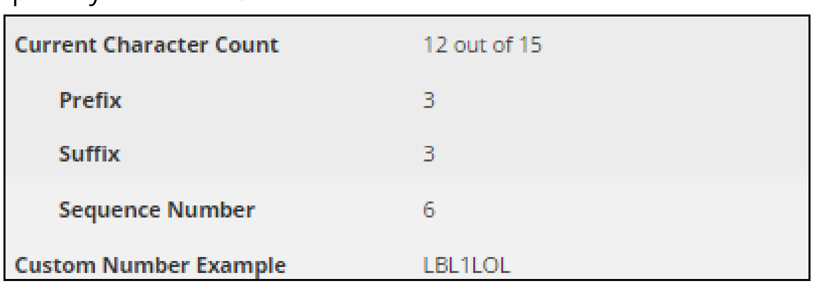
Configuring a Manually Entered Number

The Manually Entered option displays a field for entering a custom number. Select Yes in the Required on Save field to require entry in this field before the work item can be saved. Select Yes in the Mark Read Only Once Saved field to prohibit entry in the field after the work item is saved.



Configuring an Automatically Generated Number

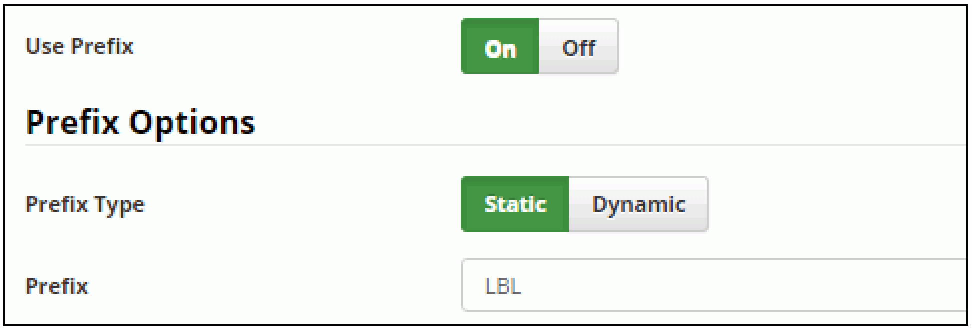
The Automatically Generated option creates numbers automatically based on prefix, suffix, and sequence settings that you configure. You can either use a static (fixed) custom prefix and suffix, restricted via a start and end number if desired. Prefixes and suffixes can be static (fixed) or dynamic; however, if you have a dynamic prefix you must have a static suffix. The number cannot exceed 15 characters; the box above the Use Prefix field contains a current character count and example of your entries.



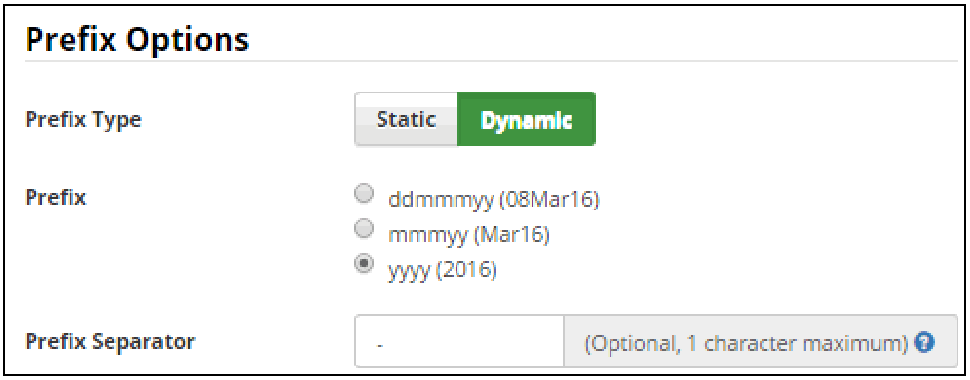
Configuring the Prefix

In the Prefix Options section, select the Use Prefix checkbox to configure characters that will precede the custom number. Then select the prefix type: static (fixed) or dynamic (a day, month, and/or year combination).

- If using a Static prefix type, enter the characters (letters, numbers, or symbols) in the Prefix field.



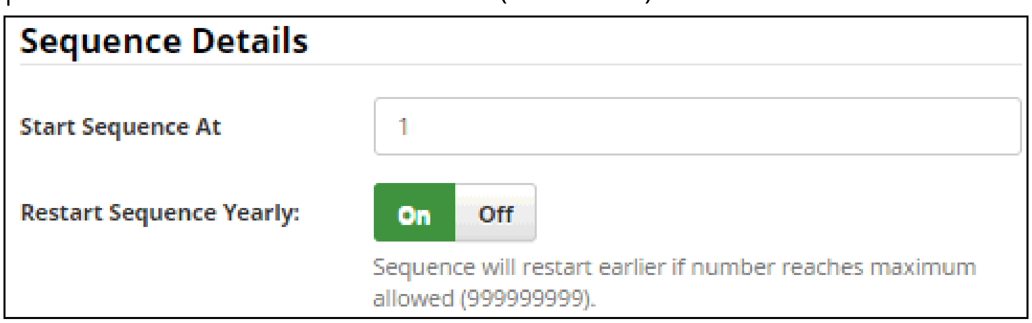
- If using a Dynamic prefix type, select the day, month, and year combination in the Prefix field. You can optionally enter a character (such as a hyphen) in the Prefix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



Configuring the Sequence

Use the fields in the Sequence Details section, to configure the sequence number between any configured prefix and any configured suffix.

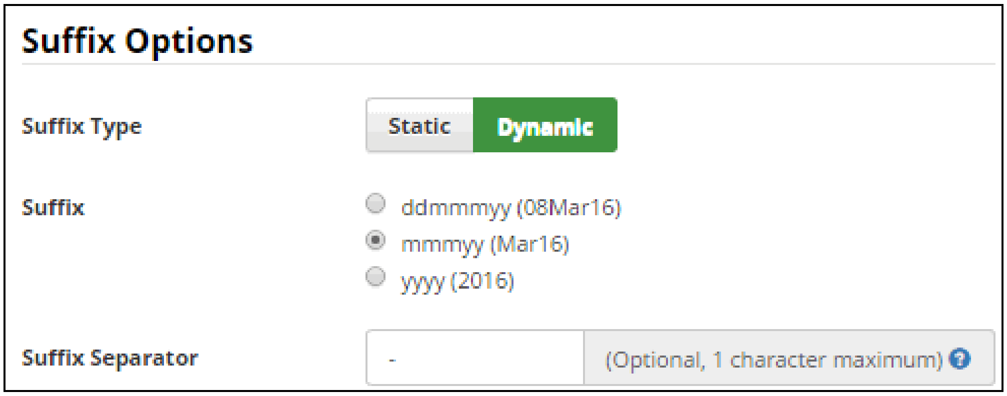
- Enter the number to start the sequence in the Start Sequence At field.
- Your selection in the Prefix field will determine the Restart Sequence field. If you select yyyy and you wish to restart the sequence when the first work item is created after 12:00pm on December 31, select Yes in the Restart Sequence Yearly field.
- If you wish to restart the sequence after the sequence number reaches a specified maximum (for example, after the sequence number reaches 1000), enter the maximum number in the Restart Sequence After field. If not specified, sequence will restart at maximum allowed (999999999).



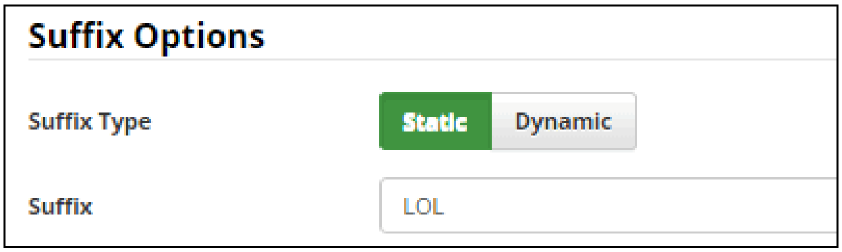
Configuring the Suffix

Select On in the Use Suffix field to configure characters that will be placed after the custom number. If using a Dynamic prefix type, you'll need to use a static suffix.

- If using a Dynamic suffix type, select the day, month, and year combination in the Suffix field. You can optionally enter a character (such as a hyphen) in the Suffix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



- If using a Static suffix type, enter the characters (letters, numbers, or symbols) in the Suffix field.



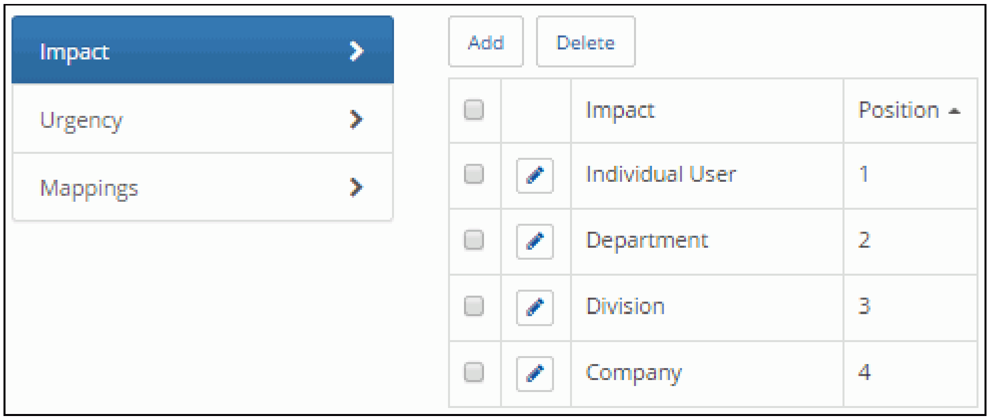
Defining and Mapping Impact and Urgency Values

Prioritization encompasses urgency (based on the amount of time a resolution is needed) and impact (usually the number of users affected); use the Impact and Urgency configuration screen to define impact and urgency values that map to priority levels. These values are used by Incident, Problem, and Change functionality.

In the Incident, Problem, and Change screens, the defined values will be available in the Impact and Urgency fields for selection. The specified mapped priority will appear as default but all priority levels will available if permissions are configured for the support representative to change the priority.

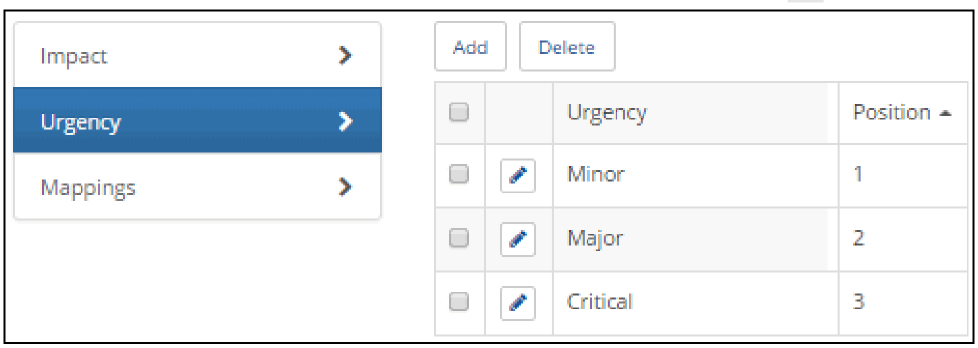
Adding Impact Values

Use the Impact tab to define values for the effect of an Incident, Problem, or Change on business processes. Click the Add link on the Impact tab to add a value; use the Edit icon to make a change.



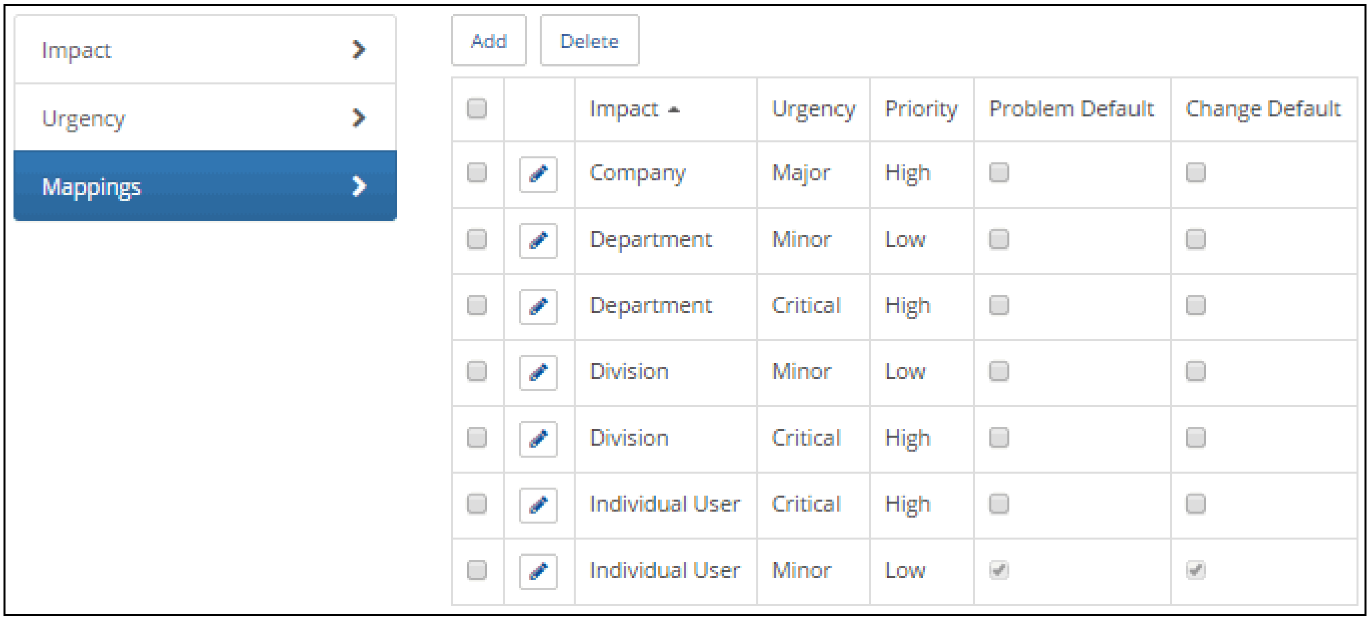
Adding Urgency Values

Use the Urgency tab to define values for the measure of how long it will be until an incident, problem, or change has a significant impact on the business. Click the Add link to add a value; use the Edit icon to make a change.



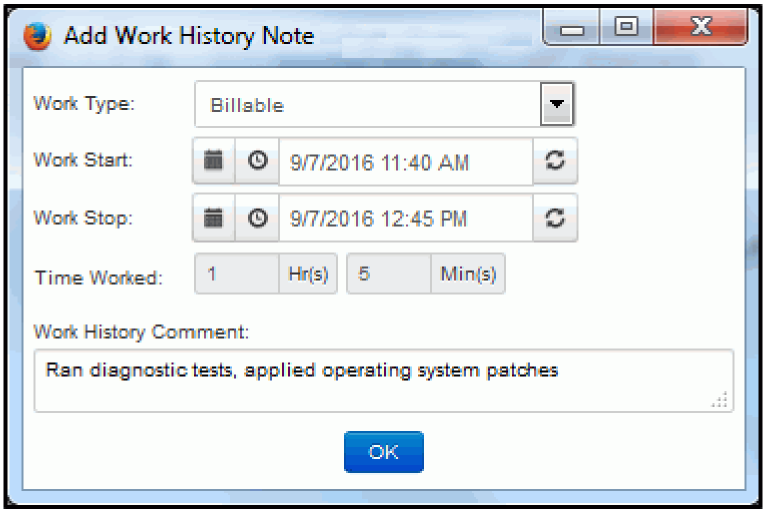
Defining Mappings

Use the Mappings tab to associate impact, urgency, and priority values and to specify the defaults to appear when the associated values are selected in the Incident, Problem, and Change screens. Click the Add link to add a value; use the Edit icon to make a change.

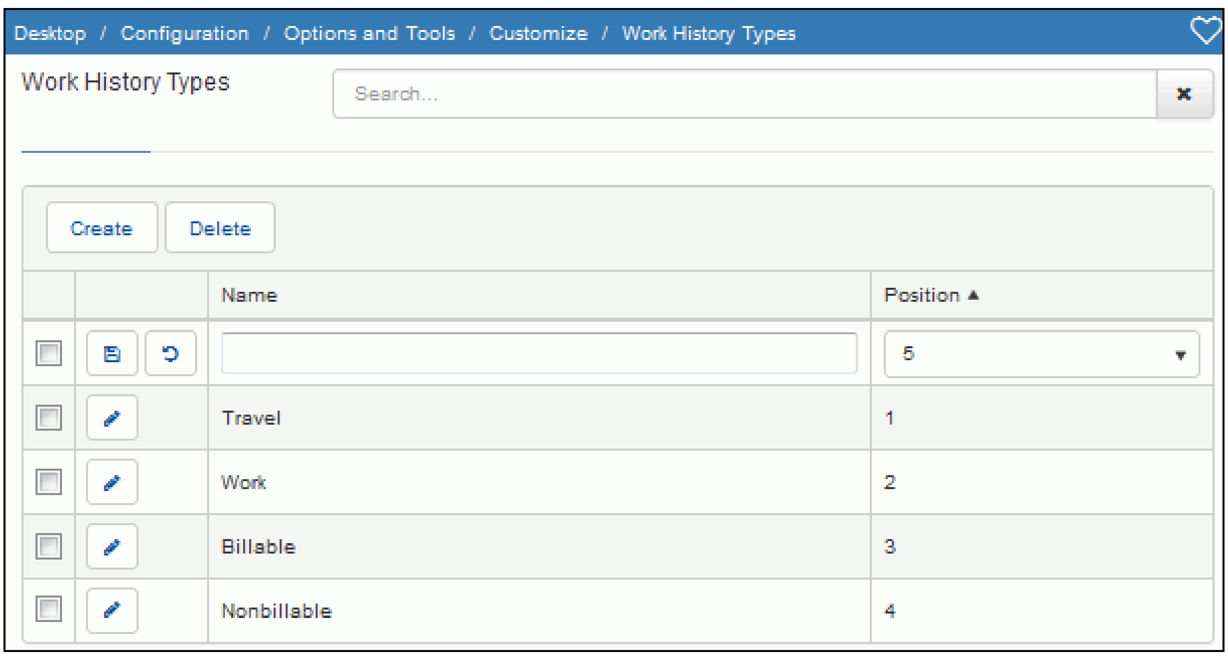


Configuring Work History Types

Use the Options and Tools | Customize | Work History Types screen to create custom entries for support representatives to select to describe the work performed on a work item. As shown in the example below, these entries will display as options in the Work Type field in the Work History and Save dialogs in the Incident, Problem, Change, and Purchasing screens. The Work Type field is enabled for incidents, problems, and changes in the Feature Basics screen.



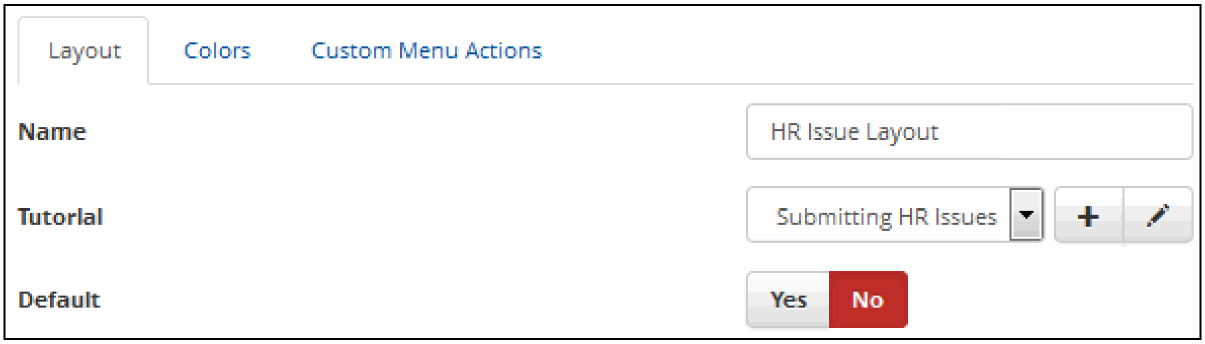
Use the Name field to enter work history types. In the Position field, select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)



Configuring Screen Layouts

iSupport includes default layouts for the entry screens used by support representatives and the display and submit screens used by customers on the mySupport portal. Use the Layout screens in each configuration module (except CMDB) to modify these layouts and use fields and tabs that are specific to your company. You could create layouts based on different types of users, different types of work, etc. Note that layouts configured via the Layout screen in each module **will not** apply to smart phones; only layouts configured via the Mobile Settings screen will apply to the mobile HTML5 interface.

You can assign different layouts to different asset types, and you can assign different incident, problem, and change layouts to support representative groups, customer groups, categories. For incidents and changes, you can assign different layouts to templates and hierarchy templates.



More than one layout may be applicable to incidents, changes, and assets; for example, if a layout is associated with the logged in rep's primary group as well as with the selected category for an incident. Use the **Order of Precedence** link on the those list screens to specify which layout to use when more than one reference is applicable.

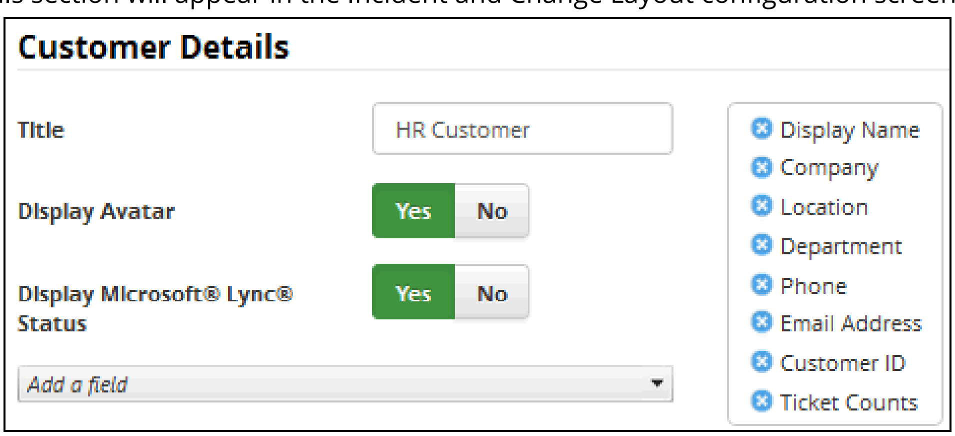
For Rep Client layouts, you can use the Preview button at the bottom of the Layout screen after adding required fields to the form to display your layout. You'll need to select a record to use for displaying field data.

Use the **Tutorial** field to associate a tutorial that will display the first time the support representative accesses a screen with the layout. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content. Use the Create New + and View/Edit icons to access the Tutorials screen to create a tutorial or view/modify the selected tutorial; see the online help for more information. In that screen you can associate a tutorial with entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards.

Select the **Default Layout** checkbox to display the layout if none is associated with current support representative group, customer group, category, incident template, or hierarchy template.

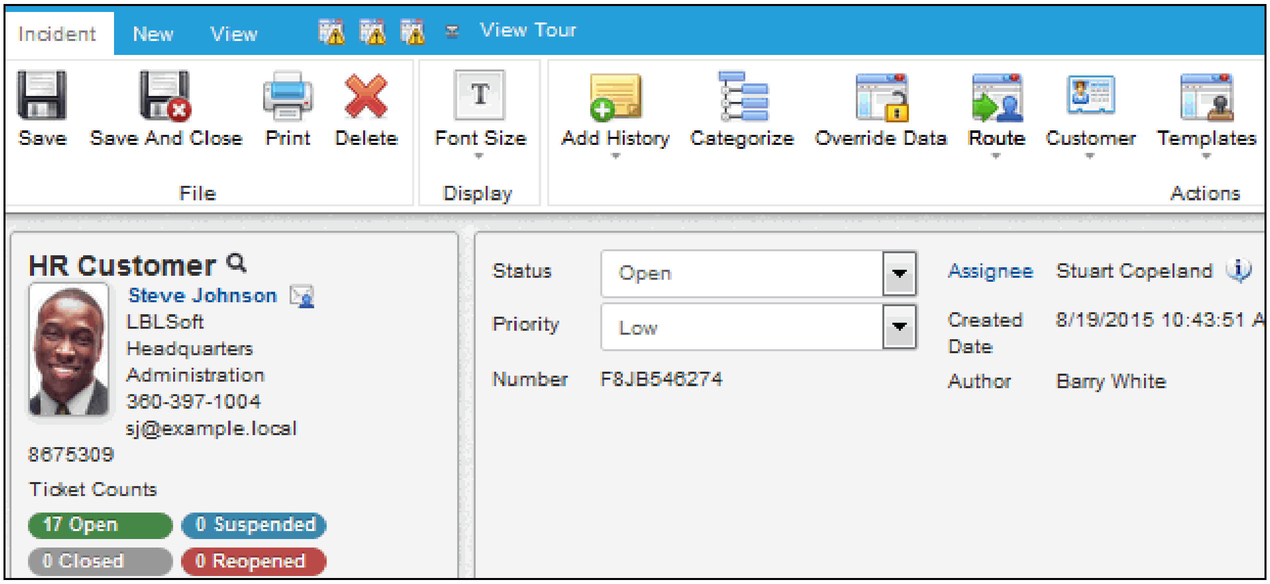
Configuring Customer Details

The Customer Details section will appear in the Incident and Change Layout configuration screens as shown below.



Use the **Title** field to customize the text to appear to the left of the search icon in the customer section; "Customer" will appear by default.

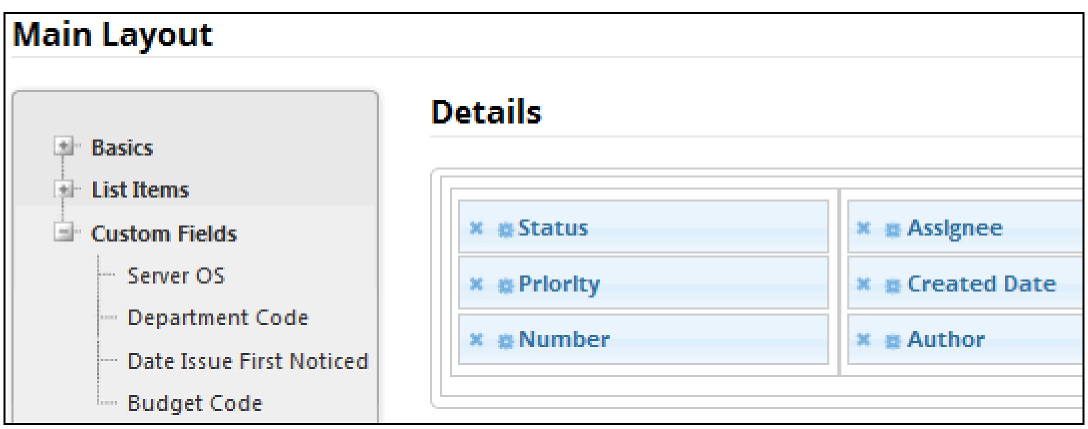
To include the customer's avatar (uploaded via the Customer Profile screen or the mySupport portal), select Yes in the **Display Avatar** field. Use the Add a Field dropdown to select the fields to appear in the upper left Customer area at the top of the Incident screen. Note that the **Ticket Counts** field will include Open, Closed, Suspended, and Reopened links in the Customer section of the Incident screen as shown in the example below.



Use the **Display Microsoft® Lync® Status** field to include an icon that will display the Microsoft Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Lync functions. In order for the icon to appear, Microsoft Lync 2013 must be installed on your system, the support representative viewing the incident must be using Internet Explorer, and iSupport must be in the intranet or added to trusted sites.

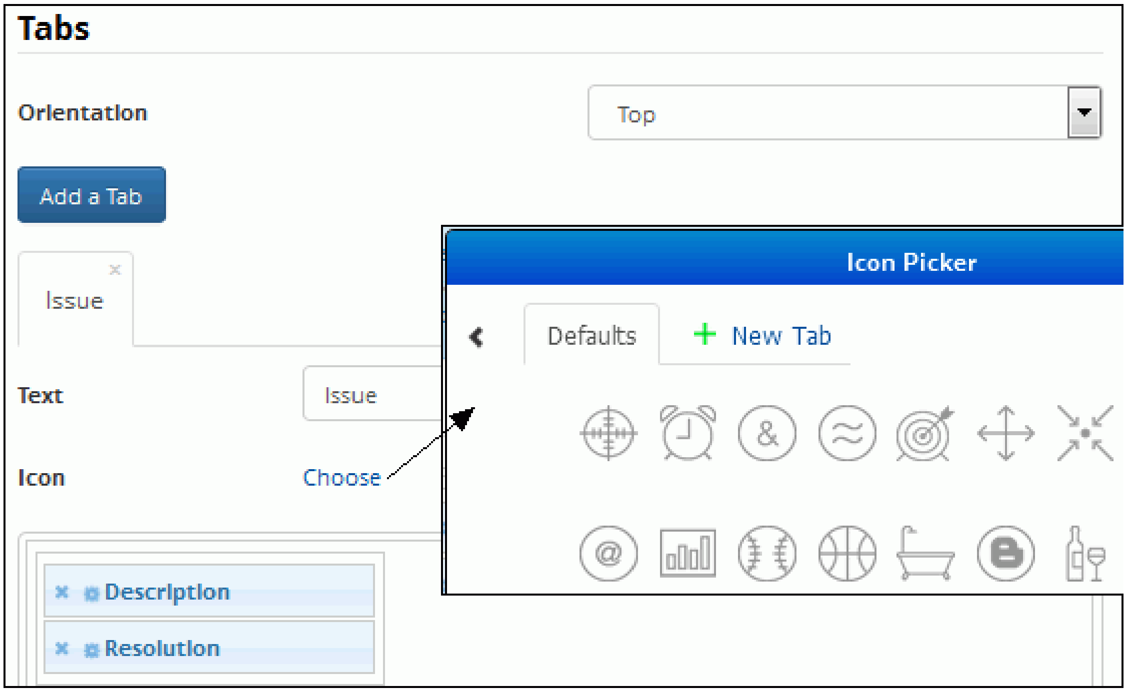
Adding Fields and Tabs

To configure the Details section in the upper right section of the resulting screen, drag fields from the selector on the left to the middle of the Details area on the Layout screen. For custom fields, you can either drag the fields under Custom Fields individually or you can drag Custom Fields under List Items to drag all of the custom fields at once. Required fields are designated with an asterisk in the selector on the left.

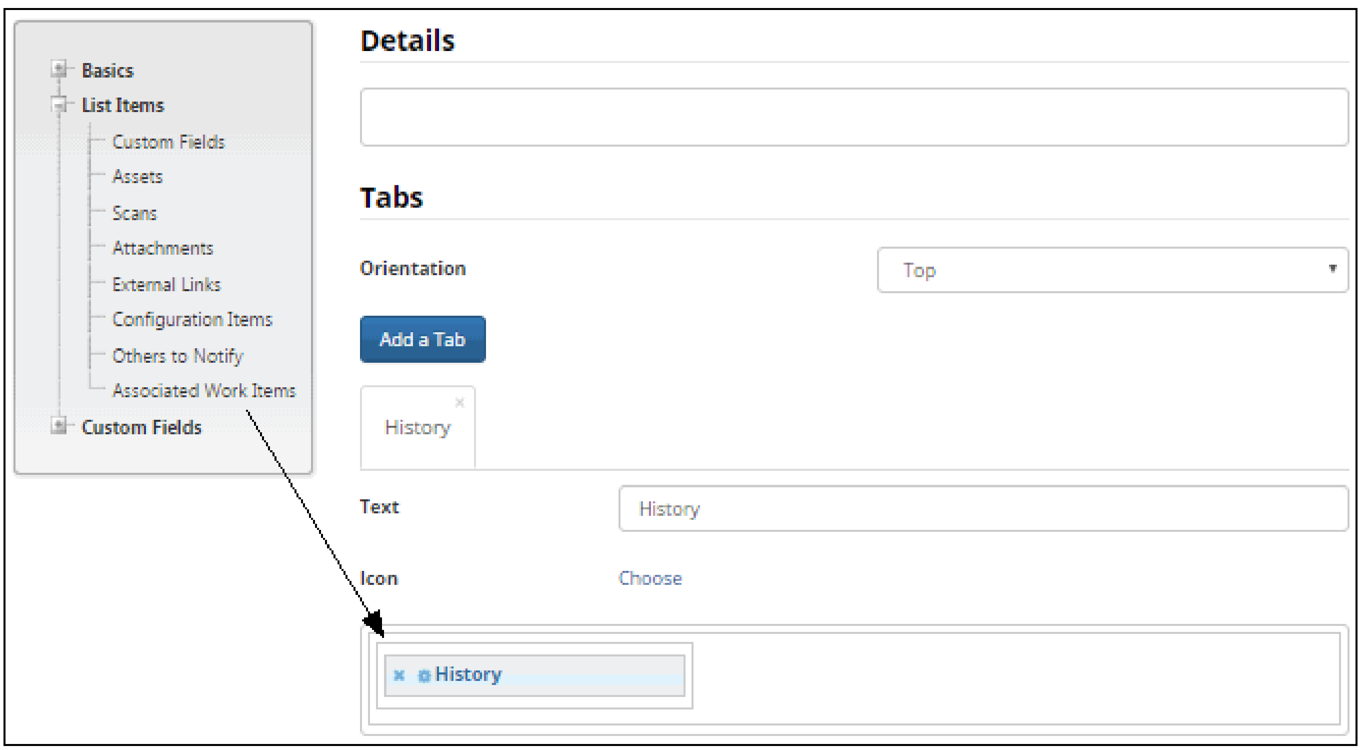


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if you include it in your layout, the default Save button will still be retained at the top of the Submit screen.

Tabs can display in a row above fields or to the left of fields on the lower half of the resulting screen. To add a tab, click the Add a Tab button and then click on the new tab (named "Tab" by default). Use the Text field to enter the label for the tab. Click the Choose link in the Icon field to select a default or custom image to appear to the left of any text entered as a label. (If no text is entered, only the selected icon will appear.)

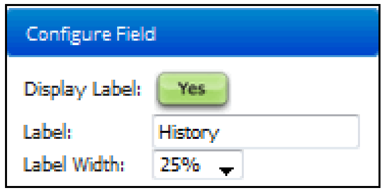


To add fields to the tab, drag fields from the selector on the left side of the Layout screen to the middle of the section below the Icon field.

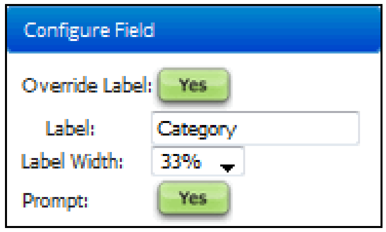


Configuring Fields

After adding a field, click the Configure Field icon to enable or disable the field label, enter the field label, and select the field label width (which is a percentage of the column in which the field is included). Note that the label width will not be applicable on list fields that display a label above the field.



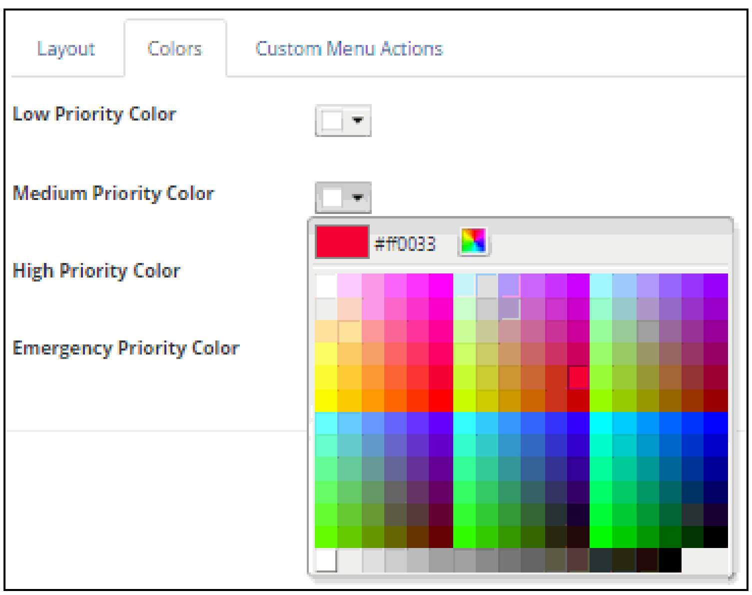
An **Override Label** field will be included for mySupport layouts; select Yes to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



A **Prompt** field will be included for the Category field on mySupport layouts; enable it to initially display the Category Select dialog when the Incident or Change Submit screen appears.

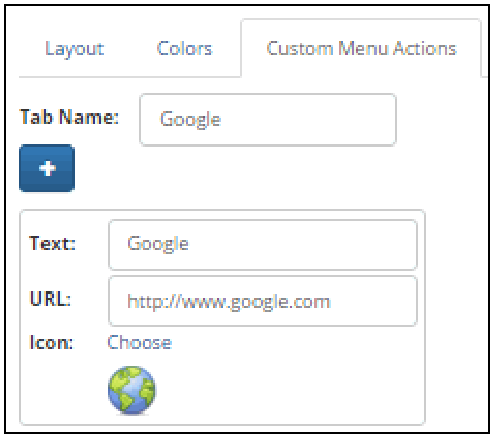
Configuring Priority-Based Background Colors

Use the Colors tab to configure the priority-based background colors for the upper portion of the Incident, Problem, and Change screens. You can choose from the color picker or input an HTML color code.



Configuring Custom Menu Actions

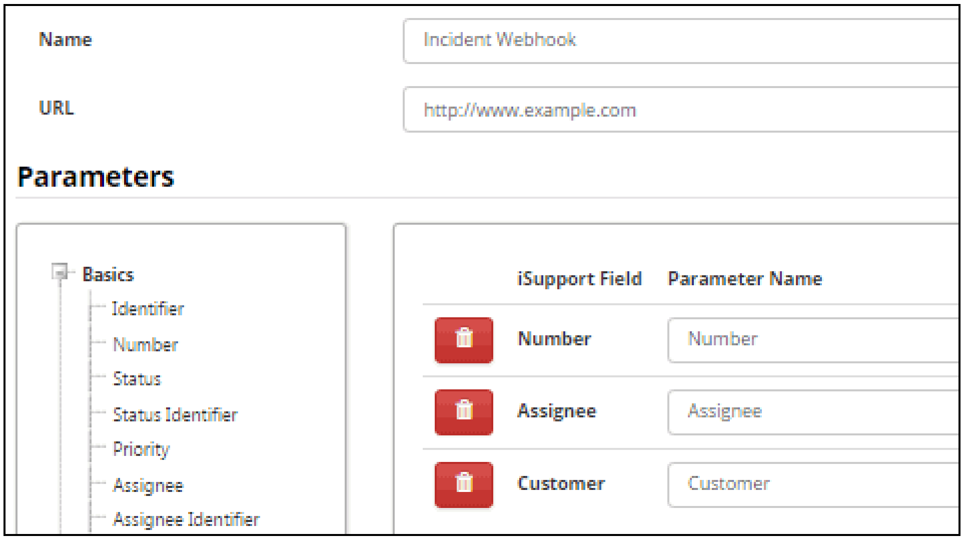
Use the Custom Menu Actions tab in the Layout screen to create a new tab, and link via an icon to a URL.



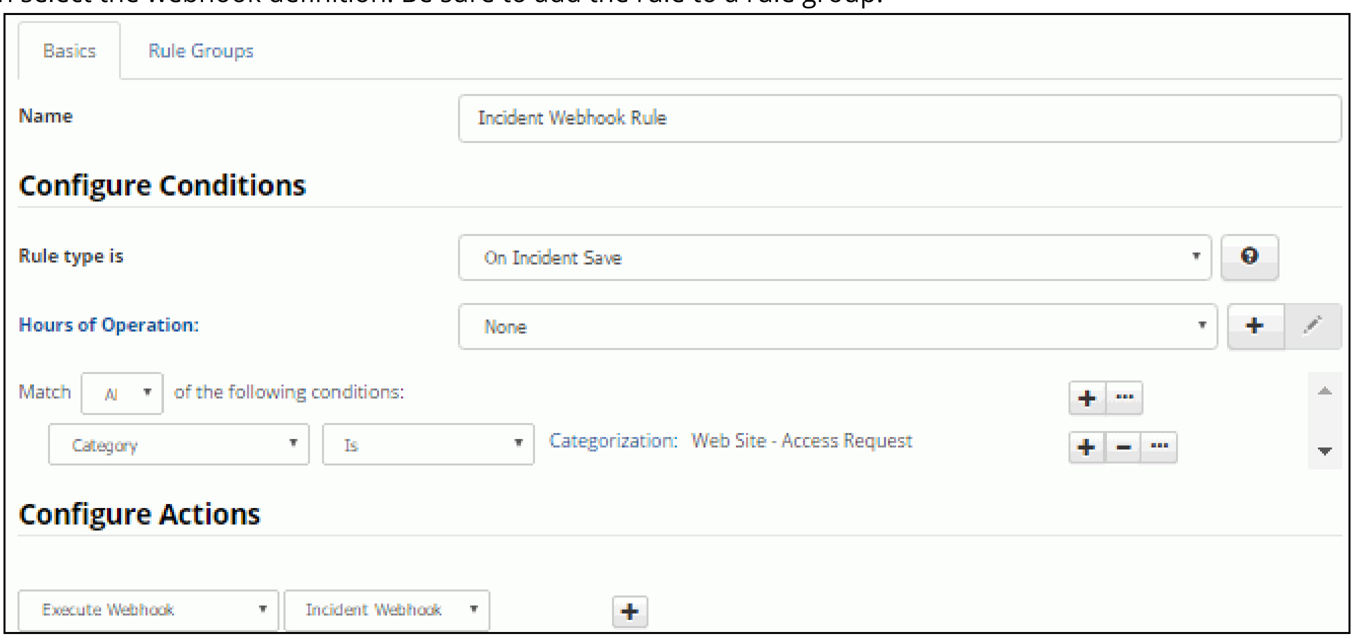
Configuring Webhooks

Use the Webhooks screen to configure webhooks for posting iSupport data to a web application. You will specify a web application URL for iSupport to post data to and the fields containing the data you want to receive, and iSupport will post the field data to the URL when configured rule conditions and time frames are met.

In the Webhooks screen, enter the name of the webhook definition that will be used in the Rule screen and URL to which iSupport data should be posted. Drag the iSupport data source fields containing the data you want to receive into the frame on the right, and enter the corresponding fields on your web form in the Parameter Name column. Note that you can drag field rows vertically to reposition fields.



Use the applicable Rule screen to configure the conditions and time frame on which the post action will occur. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition. Be sure to add the rule to a rule group.



Configuring Change Templates

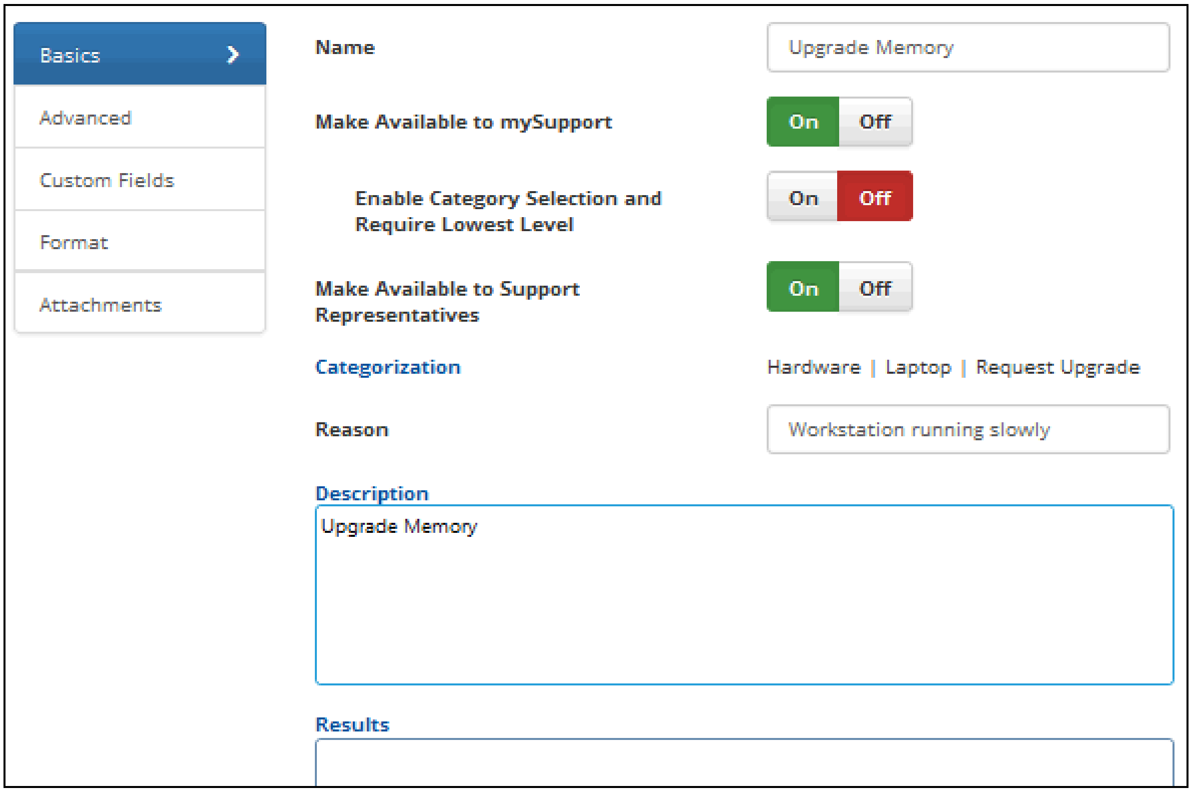
Change templates initially populate fields in Change records; use them for change requests that occur frequently.

You can assign a rule group to a template. When the template is selected in the Change screen, the rule group assigned to the template will replace any existing rule group that may be in effect (for the category or customer). When the template is selected from the mySupport portal, it takes effect based on the change creation date and time.

Note that if a template has a field that is blank, the corresponding field in the Change record will not be overwritten with a blank value.

Setting Basic Options

To get started, click the Create link in the Change Template screen.



Name - Enter a name for the change template. This name will display for selection in the Change screen.

Make Available to mySupport - Select Yes to include the template in the list of templates available for selection on the mySupport portal. You can create a link to the template using the mySupport Navigator screen.

> **Enable Category Selection and Require Lowest Level -** This field appears if Yes is selected in the Make Available to mySupport field. Select Yes to enable the category picker when the template is used on a mySupport portal. The user will be prompted to select the lowest level category if they have not already done so.

Make Available to Support Representatives - Select Yes to include the template in the list of templates available for selection in the Change screen.

Categorization - Click the Categorization link to select a category combination describing the change. This category combination will populate the Categorization field in the Change screen.

> **Display the Call Script for This Category Set** - This field is enabled if a script is associated with the selected category combination. Select Yes to display the script when the template is selected in the Change screen. To view the call script associated with the categorization, click the View Call Script link.

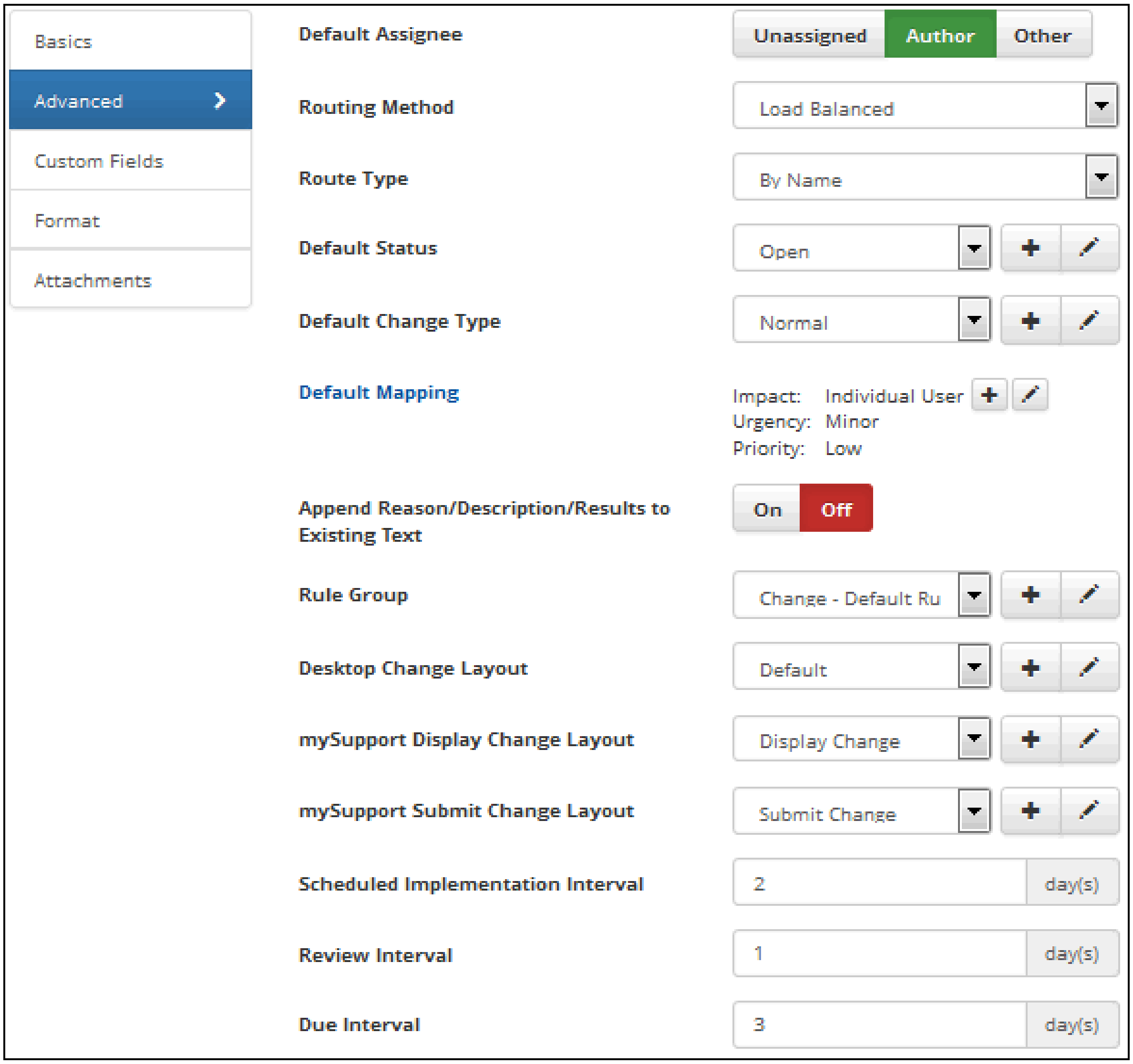
Reason - Enter the text to populate the Reason field in the Change screen.

Description - Enter the text to populate the Description field in the Change screen.

Results - Enter the text to populate the Results field in the Change screen.

Setting Advanced Template Options

Use the Advanced tab to set miscellaneous template options and enter defaults for the Assignee, Status, and Priority fields.



Default Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field in newly-created Change records.
- Author to assign newly-created Change records to the person who created the Change record.
- Other to designate a support representative to populate the Assignee field by default in newly-created Change records. Use the Create New and View/Edit icons to access the Rep Profile screen.

Route Method/Type - Select the method by which Change records created by the template are assigned: none, load balanced, or round robin. If there is no support representative available for a selected method, the change will be assigned to the support representative in the Default Assignee field. If none, the change will be assigned to the support representative in the Default Assignee field on the Basics tab in the Change Basics screen.

Default Status - Select the status level to populate the Status field in the Change screen. Use the Create New and View/Edit icons to access the Custom Status Labels screen; see "Defining Custom Status Labels" on page 17 for more information.

Default Change Type - Select the change type to populate the Change Type field when the template is selected in the Change screen. According to ITIL, change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.
- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

Custom labels can be defined for change types via the Change Basics screen. Use the Create New and View/Edit icons to access the Change Basics screen; see "Setting Up Custom Change Types" on page 8 for more information.

Default Mapping - Click this link to select the impact, urgency, and priority to populate the Impact, Urgency, and Priority fields when the template is selected in the Change screen. Use the Impact and Urgency screen to define these mappings; use the Create New and View/Edit icons to access it.

Append Reason/Description/Results to Existing Text - Select Yes to add a blank line and the text from the Reason, Description, and/or Results field to existing text when the template is applied to a saved change.

Rule Group - If applicable, select the rule group to apply when the template is selected in the Change screen. The rule group assigned to the template will replace any existing rule groups that may be in effect (for the category or customer). Use the Create New and View/Edit icons to access the Change Rule Group screen; see "Configuring Rules and Rule Groups for Changes" on page 63 for more information.

Desktop Change Layout - Select the layout containing the fields and tabs that will display when the template is selected for a change via the Change screen or a rule. You can use the Create New and View/Edit icons to access the Change Layouts configuration screen. Layouts can also be associated with a category, customer group, support rep group, or change template; the Order of Precedence field in the Change Layouts screen determines which layout to use when more than one reference is applicable (for example, if the logged in rep's primary group has a layout as does the selected category). For categories, the layout found with the lowest level will be used; if a layout is not found at the lowest level the next level up will be checked, and so on up to the top level. If no layout is associated at the top level, the default layout specified in the Layouts screen will be used.

mySupport Display Change Layout - Select the mySupport change display layout (configured via the mySupport Layouts screen) to apply when changes created by the template are displayed on a mySupport portal.

mySupport Submit Change Layout - Select the mySupport change submit layout (configured via the mySupport Layouts screen) to apply when the template is used on a mySupport portal.

Scheduled Implementation Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Scheduled Implementation field in the Change screen.

You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Scheduled Implementation date and after the Scheduled Implementation date has been exceeded.

Review Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Review field in the Change screen.

You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Review date and after the Review date has been exceeded.

Due Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Due field in the Change screen.

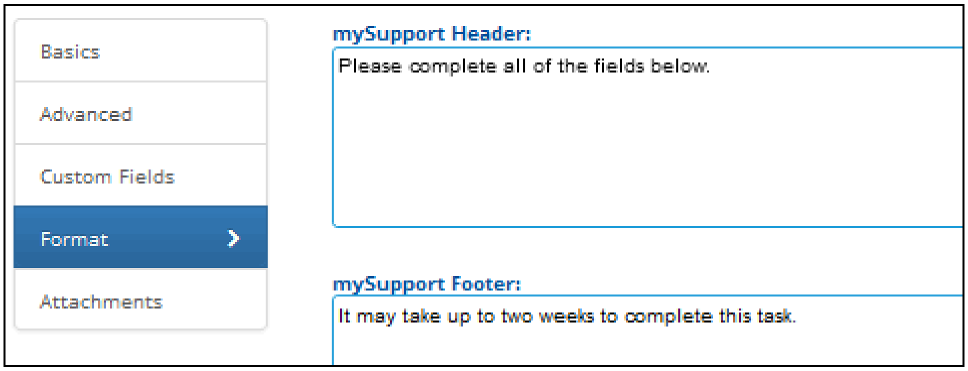
You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Due date and after the Due date has been exceeded.

Configuring Custom Fields

The third tab contains custom fields configured via the Custom Fields screen; select the values to populate custom fields by default in changes created by the template.

Formatting the mySupport Change Template Submit Screen

Use the Format tab to add formatted text and images to appear at the top (header) and bottom (footer) of the mySupport Change Template Submit screen.



Attaching Files

Use the Attachments tab to attach any files to the template.

Configuring Change Hierarchy Templates for Workflow Tasks

Use hierarchy templates to track and manage issues or tasks that have multiple activities. Existing change functionality such as escalation and routing apply to changes created from hierarchy templates.

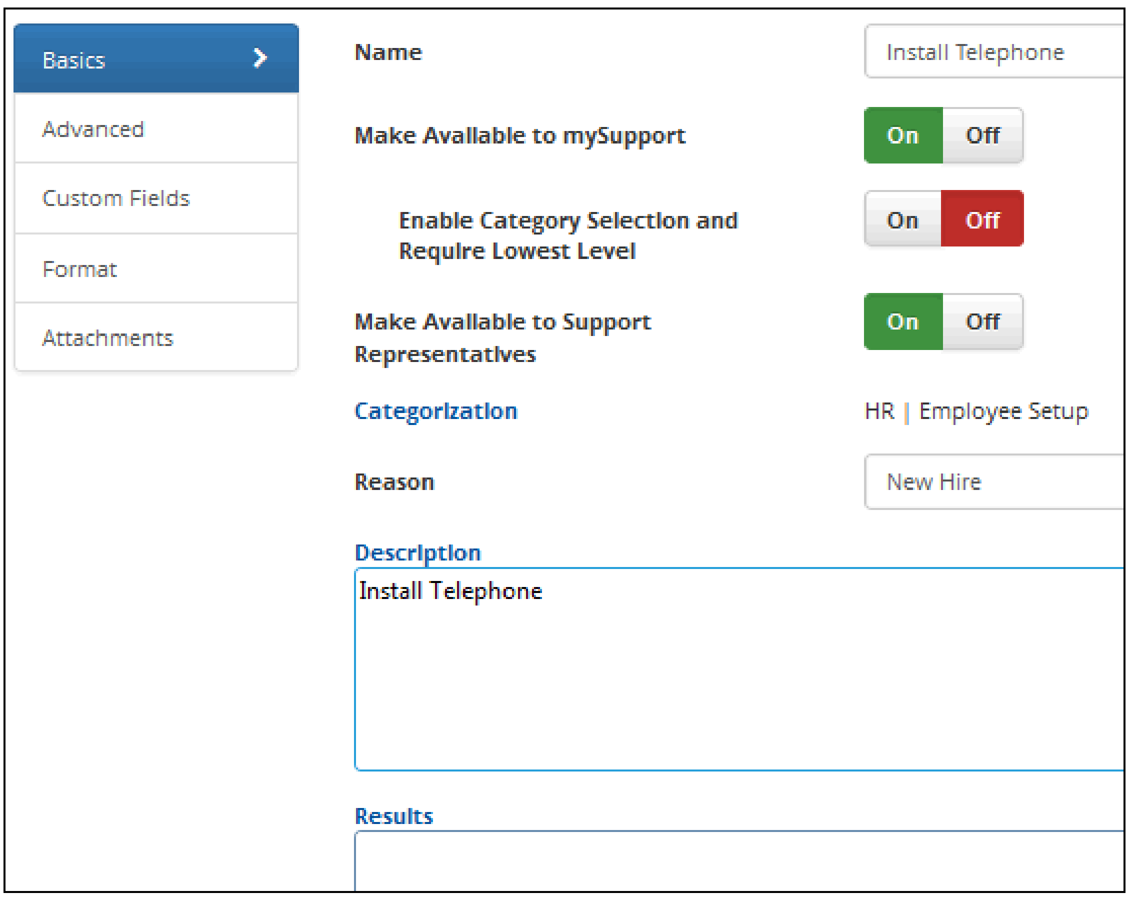
Hierarchy templates are especially useful for accountability purposes if there is more than one person involved in a set of tasks; for example, you could create a hierarchy template for installing a telephone with someone in Maintenance as the default assignee, and create a template for assigning a telephone number with someone in the Systems department as the default assignee.

In the example above, when the Install Telephone template is selected in the Change screen, a change is created from the Install Telephone template as well as the Assign Telephone Number template.

See “Creating a Lower Level Template” on page 42 for information on creating a multiple-level template hierarchy.

Creating a Top Level Template

To get started, complete the following fields on the Change Hierarchy tab in the Options and Tools | Automate | Templates screen.



Name - Enter a name for the hierarchy template. This name will display for selection in the Change screen.

Make Available to mySupport - This field is only available on a top-level hierarchy template. Select Yes to allow the template to be used on the mySupport portal. You can create a link to the template using the mySupport Navigator screen.

Make Available to Support Representatives - This field is only available on a top-level hierarchy template. Select Yes to include the template in the list of templates for selection in the Change screen.

Categorization - Click the Categorization link to select a category combination describing the task. This category combination will populate the Categorization field in the Change screen.

> **Enable Category Selection and Require Lowest Level** - This field appears if Yes is selected in the Make Available to mySupport field. Select Yes to enable the category picker when the template is used on a mySupport portal. The user will be prompted to select the lowest level category if they have not already done so.

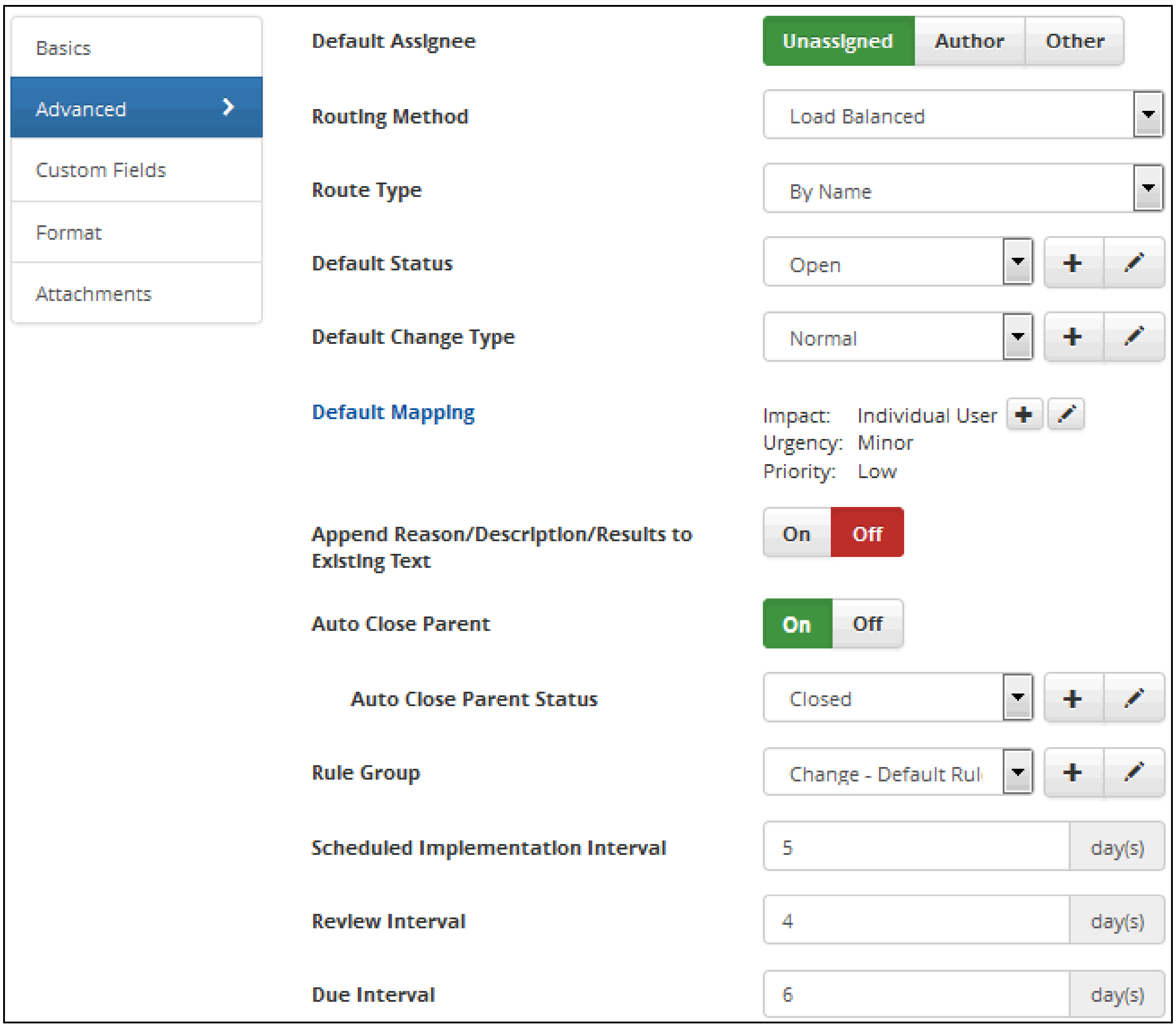
Display the Call Script for This Category Set - This field is enabled if a script is associated with the selected category combination. Select Yes to display the script when the template is selected in the Change screen. To view the call script associated with the categorization, click the View Call Script link.

Reason - Enter the text to populate the Reason field in the Change screen.

Description - Enter the text to populate the Description field in the Change screen.

Results - Enter the text to populate the Results field in the Change screen.

Use the Advanced tab on the Hierarchy Template screen to set miscellaneous template options and enter defaults for the assignee and priority fields.



Default Assignee/Select Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field in Change records created using the template.

- Author to populate the Assignee field by default with the support representative using the template.
- Other to designate a support representative to populate the Assignee field by default in Change records created using the template. Use the Create New and View/Edit icons to access the Rep Profile screen.

Route Method - Select the method by which Change records created by the template are assigned: none, load balanced, or round robin. If there is no support representative available for a selected method, the change will be assigned to the support representative in the Default Assignee field. If none, the change will be assigned to the support representative in the Default Assignee field on the Basics tab in the Change Basics screen.

Default Status - Select the status level to populate the Status field in the Change screen. Use the Create New and View/Edit icons to access the Custom Status Labels screen.

Default Change Type - Select the change type to populate the Change Type field when the template is selected in the Change screen. According to ITIL, change types are characterized as follows:

- A **standard change** is pre-authorized with an established procedure; examples include new hires, and software upgrades.
- A **normal change** requires approval and scheduling; examples include a departmental move or purchase of a new company-wide email system.
- An **emergency change** repairs an error that has a highly negative impact and urgency; examples include the failure of an email server or T1 line. Emergency changes usually require a special approval process and immediate attention.

Custom labels can be defined for change types via the Change Basics screen. Use the Create New and View/Edit icons to access the Change Basics screen; see "Setting Up Custom Change Types" on page 8 for more information.

Default Mapping - Click this link to select the Impact, Urgency, and Priority to populate the Impact, Urgency, and Priority fields in the Change screen. These mappings are defined in the Impact and Urgency screen. Use the Create New and View/Edit icons to access the Impact and Urgency screen.

Append Reason/Description/Results to Existing Text - Select Yes to add a blank line and the text from the Reason, Description, and/or Results field to existing text when the template is applied to a saved change.

Auto Close Parent - Select Yes to automatically close the top level work item if all lower level work items in the hierarchy are closed.

Auto Close Parent Status - If automatically closing a top level work item when all lower level work items in the hierarchy are closed, select or create a Closed status label to assign to the top level change that is automatically closed. Use the Create New and View/Edit icons to access the Custom Status Labels screen; see "Defining Custom Status Labels" on page 17 for more information.

Rule Group - If applicable, select the rule group to apply when the template is selected in the Change screen. The rule group assigned to the template will replace any existing rule groups that may be in effect (for the category or customer). Use the Create New and View/Edit icons to access the Change Rule Group screen; see "Configuring Rules and Rule Groups for Changes" on page 63 for more information.

Due Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Due field in the Change screen.

You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Due date and after the Due date has been exceeded.

Scheduled Implementation Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Scheduled Implementation field in the Change screen.

You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Scheduled Implementation date and after the Scheduled Implementation date has been exceeded.

Review Date Interval - Enter the number of days (after the Change record open date) to be used in the calculation of the date to display by default in the Review field in the Change screen.

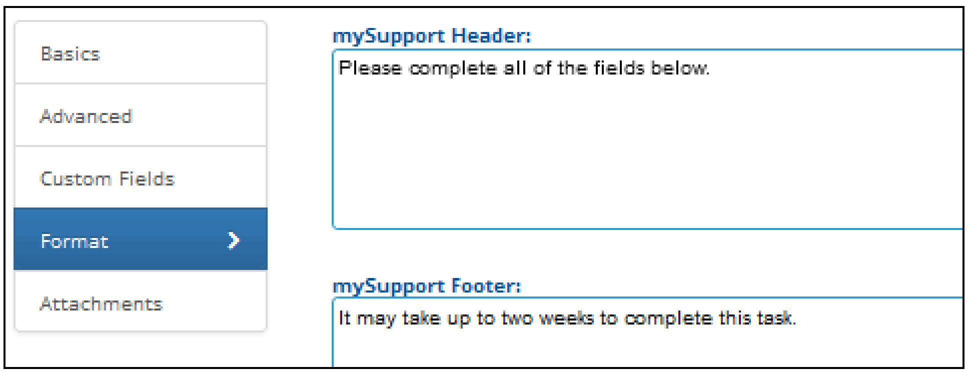
You can use the Change Rule Group screen to enable notifications to be sent to specified recipients prior to the Review date and after the Review date has been exceeded.

Configuring Custom Fields

The third tab contains custom fields configured via the Custom Fields screen; select the values to populate custom fields by default in changes created by the template.

Formatting the mySupport Change Hierarchy Template Submit Screen

Use the Format tab to add formatted text and images to appear at the top (header) and bottom (footer) of the mySupport Change Hierarchy Template Submit screen.

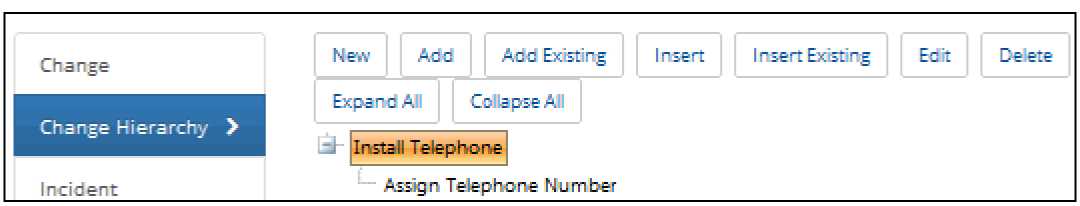


Attaching Files

Use the Attachments tab to attach any files to the template.

Creating a Lower Level Template

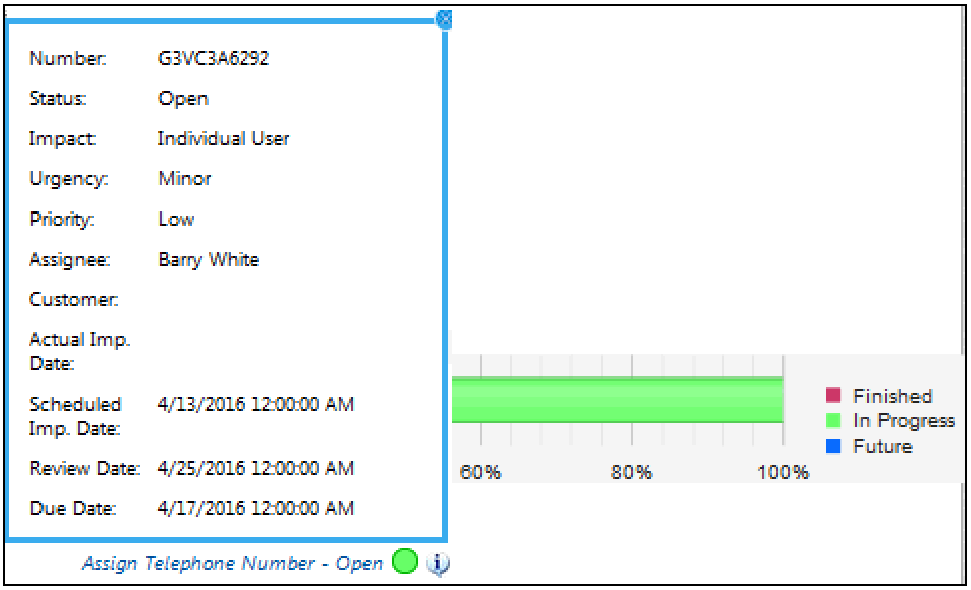
After you create and save a template, the following links appear when you select it in the View Hierarchy Templates screen:



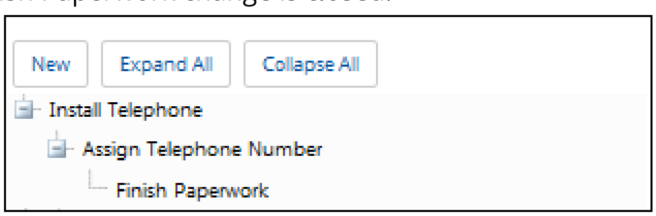
To create a template that will be one level below an existing template, select the existing template and click the Add link. The Hierarchy Template screen appears with the same fields on the Basics tab that a top-level template has, but on a lower-level template the Advanced tab is different. It does not contain the Make Available to mySupport and Make Available to Support Representatives fields because only top-level templates are available for selection in the mySupport portal and Change screens. Also, the **Depends on Closure of Changes Created From** field appears on the Advanced tab when creating a lower-level template. This field is used to select a template from which a change must be closed before a change will be created from current template; This field is detailed in "Adding Other Dependencies" on page 45.

When you add a lower level template to a top-level template, the lower level template is indented in the Hierarchy Templates Configuration screen.

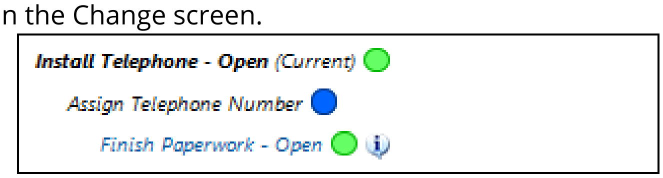
When the hierarchy template is selected in the Change screen, use either the Related Hierarchy field (if configured) or the View Related icon (which displays a dialog as shown below) to display the changes created by the template hierarchy. A Click for Details icon appears next to each open and closed change for displaying change details.



When a third level template is added to the hierarchy, a dependency is created. A change will not be automatically created from the middle-level template until the change created from the template below it is closed. In the following example, when the Install Telephone template is selected in the Change screen, it is applied to the current change and a change is created with the Finish Paperwork template. A change will be created with the Assign Telephone Number template when the Finish Paperwork change is closed.

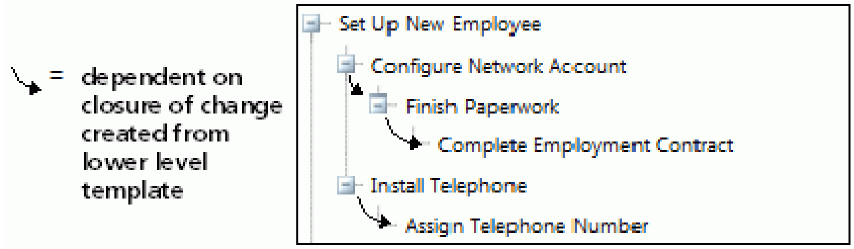


This is shown in the hierarchy in the Change screen.



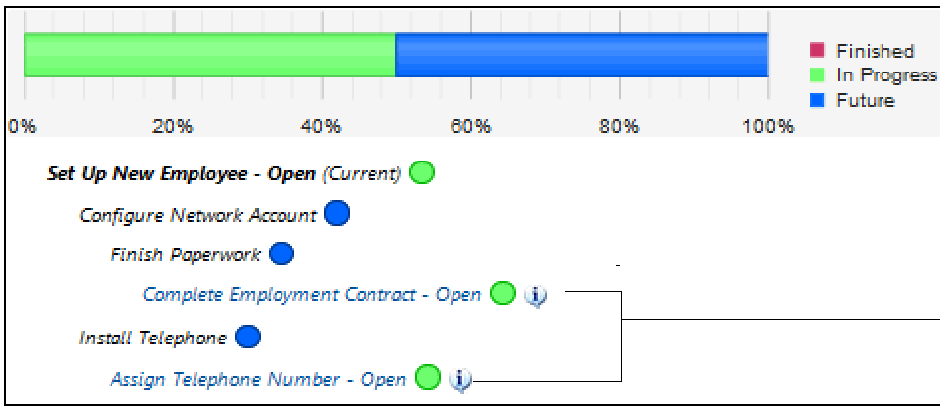
In iSupport, template components that have not created changes due to dependencies are called *placeholders*.

Dependencies are created as you add more levels. In the example below, a change created from the Finalize Employment Contract template must be closed before a change will be created from the Finish Paperwork template.



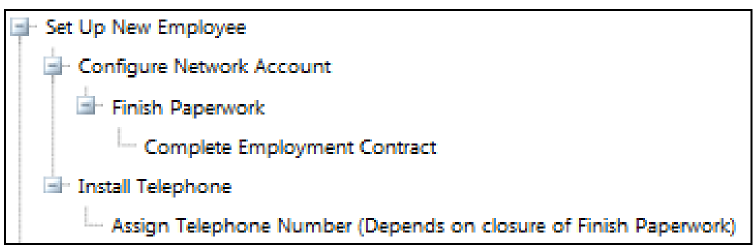
This is shown in the Change screen when you view the hierarchy.

Items without a status are template placeholders for which changes have not been created (because of closure dependencies on lower level or other changes).

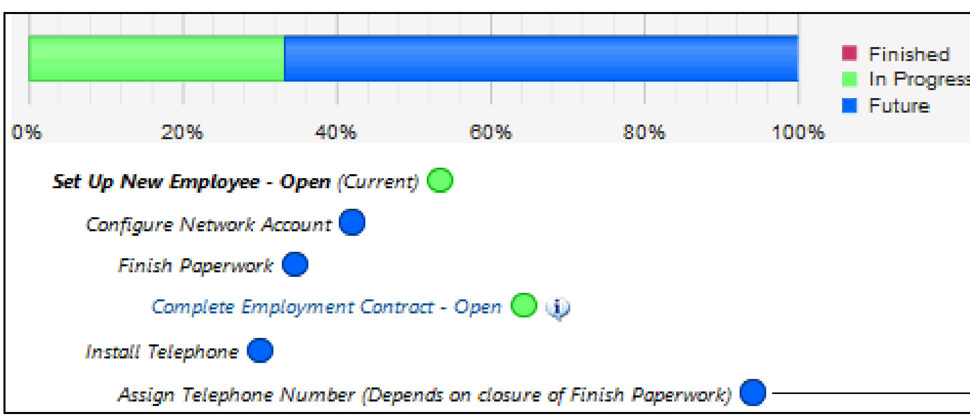


Items with a status are the descriptions of changes that have been created because they have no closure dependencies. To view a change, click on a link.

In addition to the dependency that exists when a template is directly below (a lower level template to) another template in a hierarchy, you can define a separate dependency. In the following example, the Assign Phone Number template is defined to be dependent on closure of a change created from the Finish Paperwork template.



The defined dependency is shown in the Change screen when you view the hierarchy.

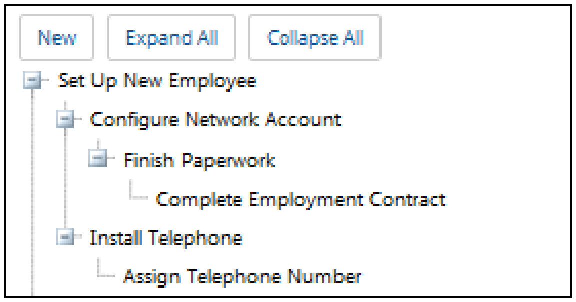


Defined dependency

For information on defining the separate dependency, see "Adding Other Dependencies" on page 45.

Building a Workflow Hierarchy

You can use the Add, Add Existing, Insert, and Insert Existing links to create larger hierarchies as shown in the example below. It is useful to chart your template structure using a white board to ensure that it is logical and complete.

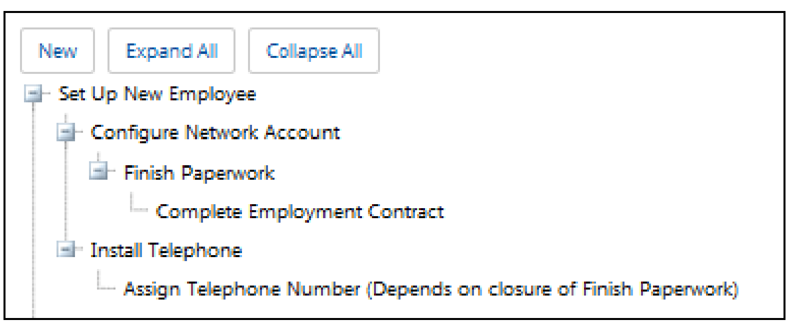


You would use the following steps to create the workflow:

1. Use the New link to create and save the Set Up New Employee template.
2. Select the Set Up New Employee template and click the Add link. Create and save the Add Network Account template.
3. Select the Configure Network Account template and click the Add link.
4. Create and save the Finish Paperwork template.
5. Select the Finish Paperwork template and click the Add link.
6. Create and save the Complete Employment Contract template.
7. Select the Set Up New Employee template and click the Add link. Create and save the Install Telephone template.
8. Select the Install Telephone template and click the Add link.
9. Create and save the Assign Telephone Number template.

Adding Other Dependencies

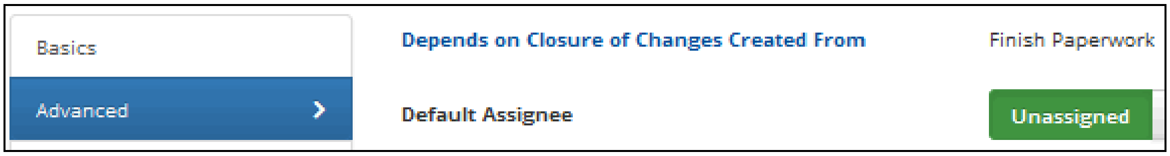
In addition to the dependency created when you add or insert a template, you can define a dependency on a template that is not on a level directly below the specified template. In the following example, a dependency can be defined for the Assign Telephone Number template so that a change will not be created from it until a change created from the Finish Paperwork template is closed.



To define this type of dependency, you would first select the template (Assign Telephone Number in this example) and click the Edit link.

In the Hierarchy Template screen, click the Depends on Closure of Changes Created From link on the Advanced tab and select the template from which a change must be closed before a change will be created from current template.

Continuing with the example, you would select the Finish Paperwork template.



Note: When you use the Edit link to change a template, the change will not be reflected in any other hierarchies that use the template. Changes already created from the template are not affected; however, future changes created from the template will reflect the change.

Adding Existing Templates

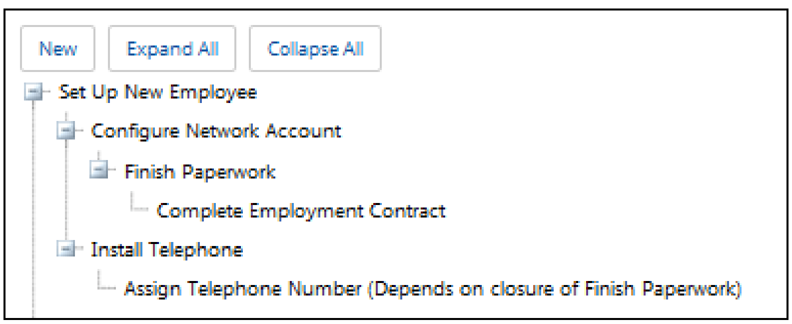
When you use the Add Existing link to add an existing template to a hierarchy, a copy of the existing template is placed a level *under* the selected template and changes can be made if necessary. If the template that is copied includes lower level templates, those templates are also copied.

Inserting Templates Into a Hierarchy

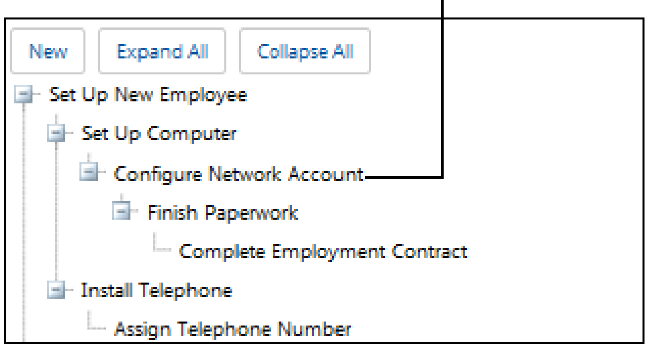
Once you have created a workflow hierarchy, you can use the Insert and Insert Existing links to insert a copy of a template into it. The inserted template will be placed *above* (as a parent to) the selected template, pushing the selected template down a level. If the template to be inserted includes lower level templates, those templates are also copied.

In the example below, if you were to select the Arrange Orientation template, click the Insert link, and create and save a template, the template hierarchy would look like the following.

Before

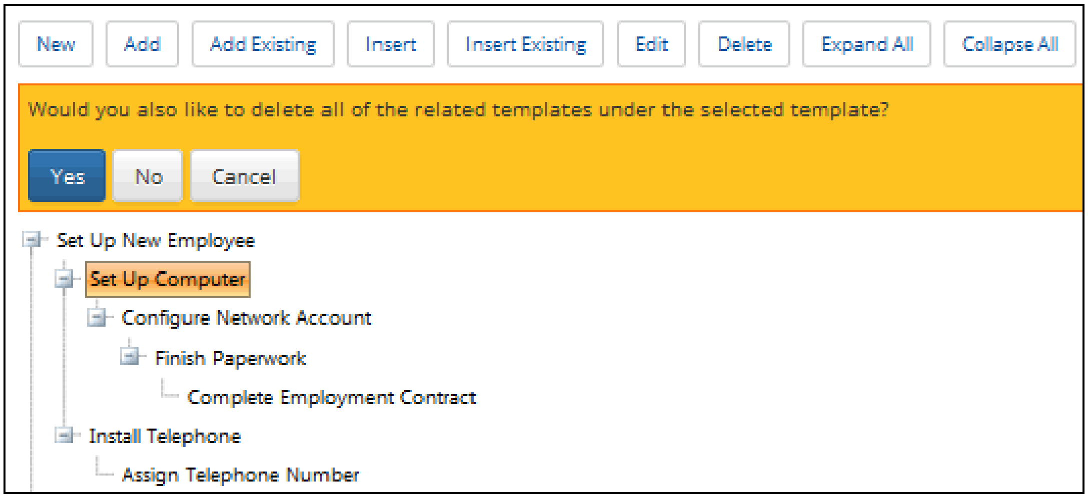


After selecting the Configure Network Account template and inserting Set Up New Computer template, the Configure Network Account template becomes a level lower than the inserted template.

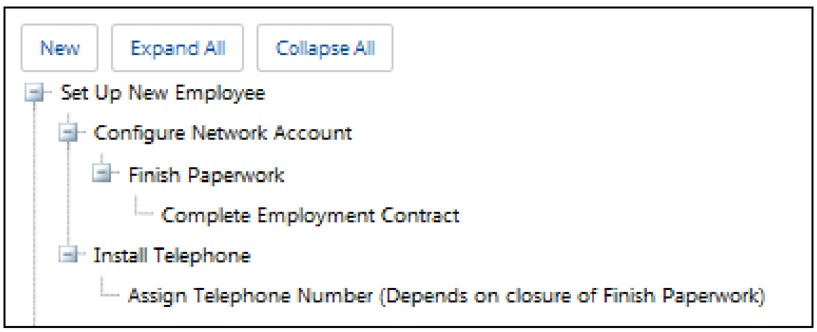


Deleting Templates in a Hierarchy

If you need to delete a template that has lower level templates, you can choose to delete the lower level templates or move them under the upper level of the template to be deleted. In the example below, if you select the Set Up New Computer template and click the Delete link or press the Delete key, the following prompt will appear after a verification prompt:



If you answer No, the lower level template (Configure Network Account in the example below) will move up one level in the hierarchy, becoming a lower level of the Process New Employee template.



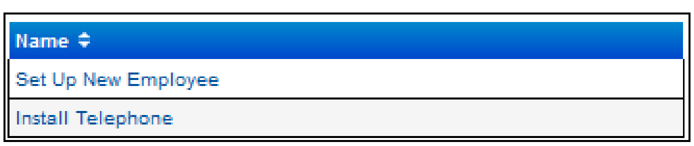
If you delete a top level template, the next level of templates below it will each become top-level templates. Any templates below those will retain their lower level templates.

If you delete a template with no lower level templates, the template will be deleted after a confirmation message. If you delete a template that has been used to create changes, the template will not be deleted until the associated changes have been closed and archived or deleted and removed via the Database Maintenance agent.

Note: There is no limit to the number of templates in a hierarchy.

Using Hierarchy Templates in the Change Screen

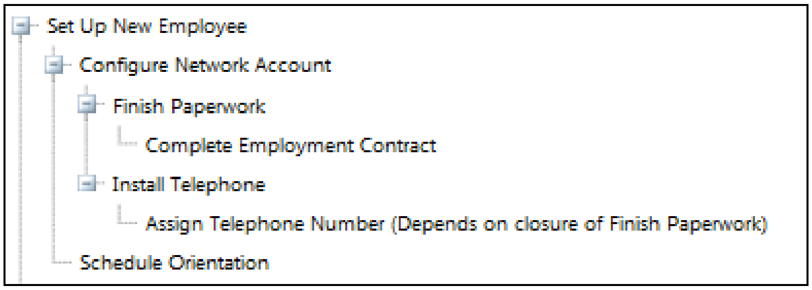
To use a hierarchy template in the Change screen, select Change | Templates | Use Hierarchy Template.



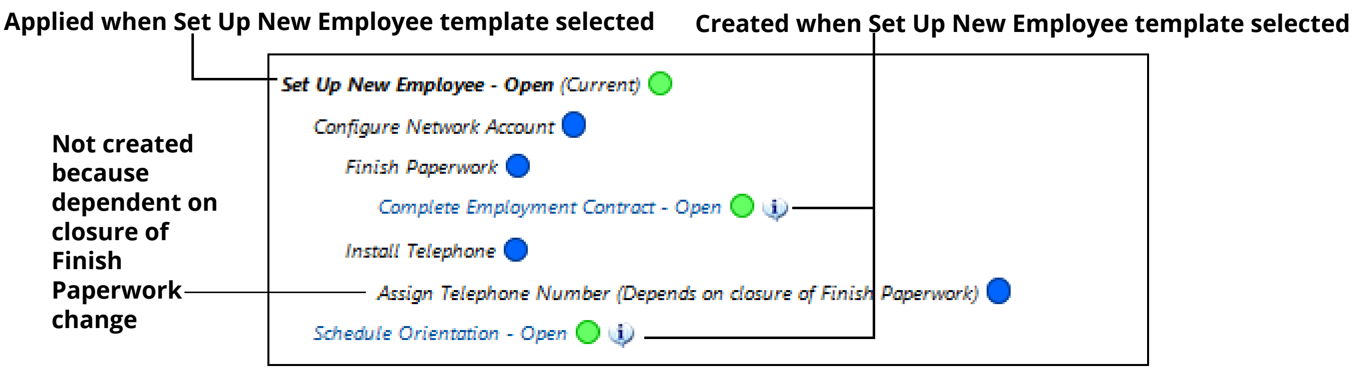
Only top-level templates appear for selection in the Change screen and on the mySupport portal (if configured to be available to support representatives and customers).

When a hierarchy template is selected for a change, the template structure is copied to the Change record. The top-level template is applied to the change and Change records are created for any templates without lower-level templates or other dependencies. If a template contains a dependency, a change is *not* created from it until the dependent changes are closed.

Template Hierarchy



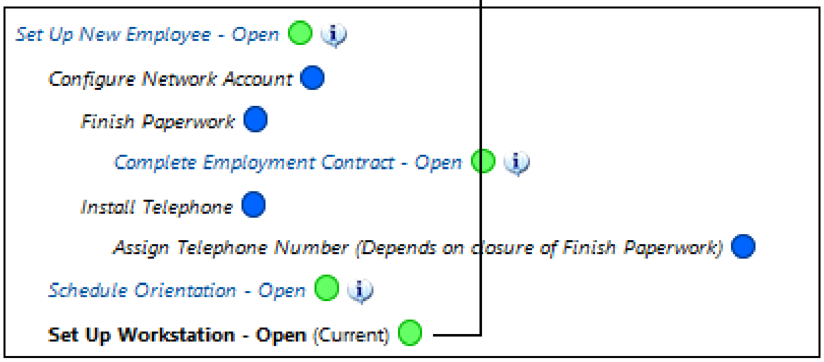
When Template is Selected in Change Screen



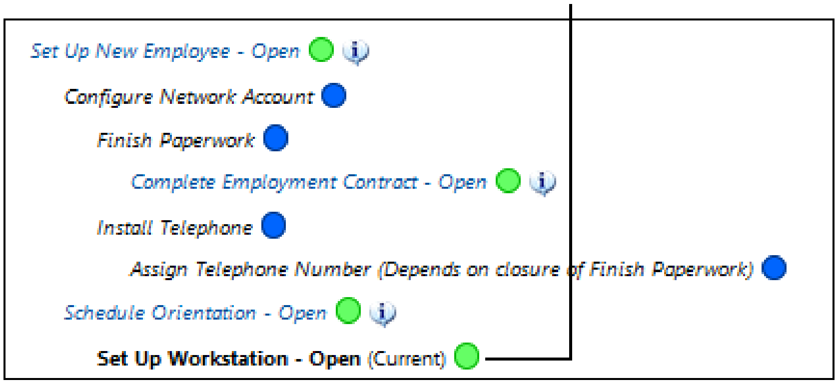
Adding Changes to a Template Hierarchy

To add a change or a change and its hierarchy to a change in a hierarchy template structure, you can select New | Related Change or use the Add options under Change | Hierarchy to add an existing change.

Added to Set Up New Employee top level change



Added to Schedule Orientation lower level change

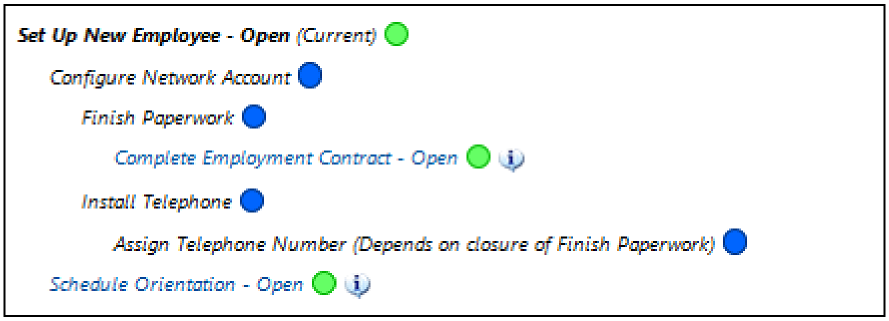


If the added existing change contains lower level changes, the structure is also added.

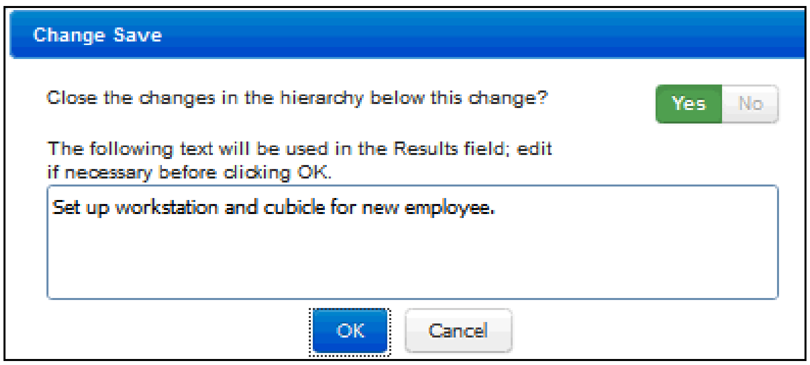
Closing Changes in a Hierarchy Template Structure

Closing a Top Level Change in a Hierarchy Template

If you close the top level change in a hierarchy template structure, changes in all levels underneath it must also close and changes will not be created from template placeholders. In the example below:

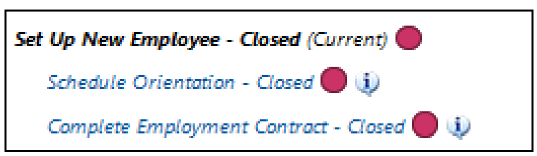


In the Set Up New Employee change, the following dialog appears when you enter results, select a closed status, and save the change:



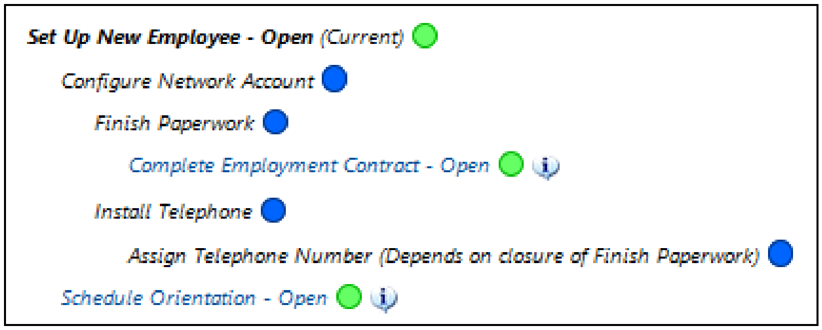
Use this dialog to change the results that will be applied to the open lower level changes before closure. If you select Cancel in this dialog, the top level change will remain open.

If you select OK, the hierarchy is as follows:

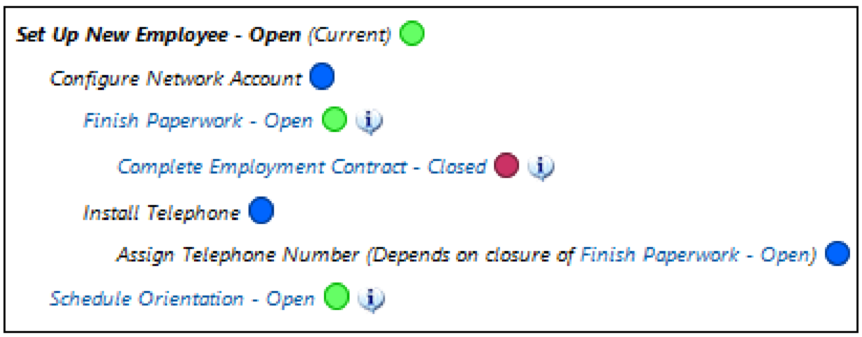


Closing Lower Level Changes in a Hierarchy

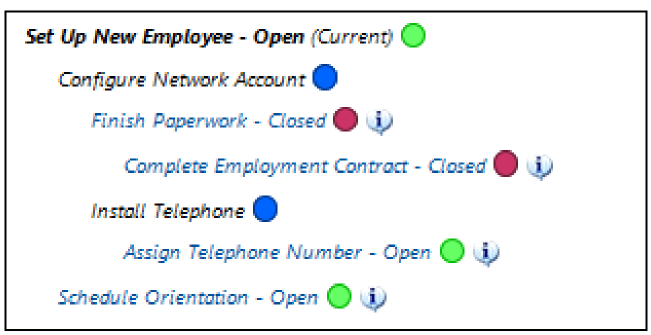
When a lower level change in a hierarchy template is closed, changes are created from templates that were dependent on closure of that change. In the following example, after the Complete Employment Contract change is closed, the Finish Paperwork change is created.



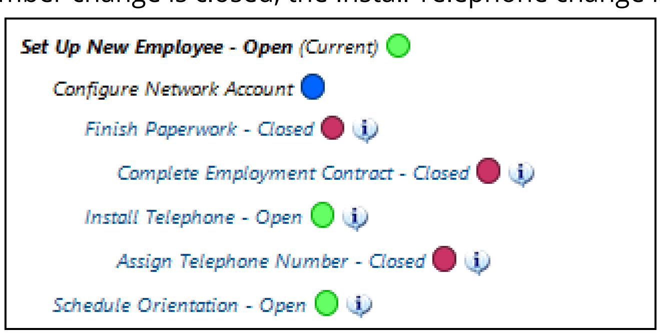
After Complete Employment Contract change closed



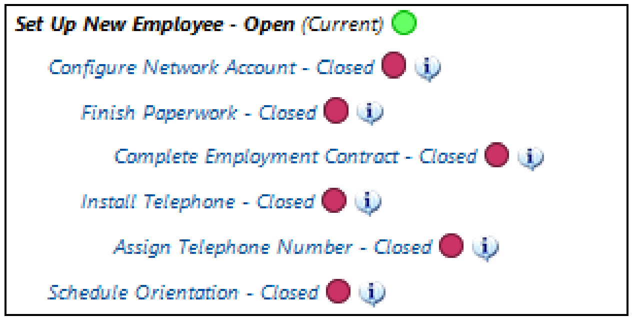
When the Finish Paperwork change is closed, a change will be created from the Configure Network Account template. A change will also be created from the Assign Telephone Number template because the change on which it was dependent is closed.



When the Assign Telephone Number change is closed, the Install Telephone change is created.



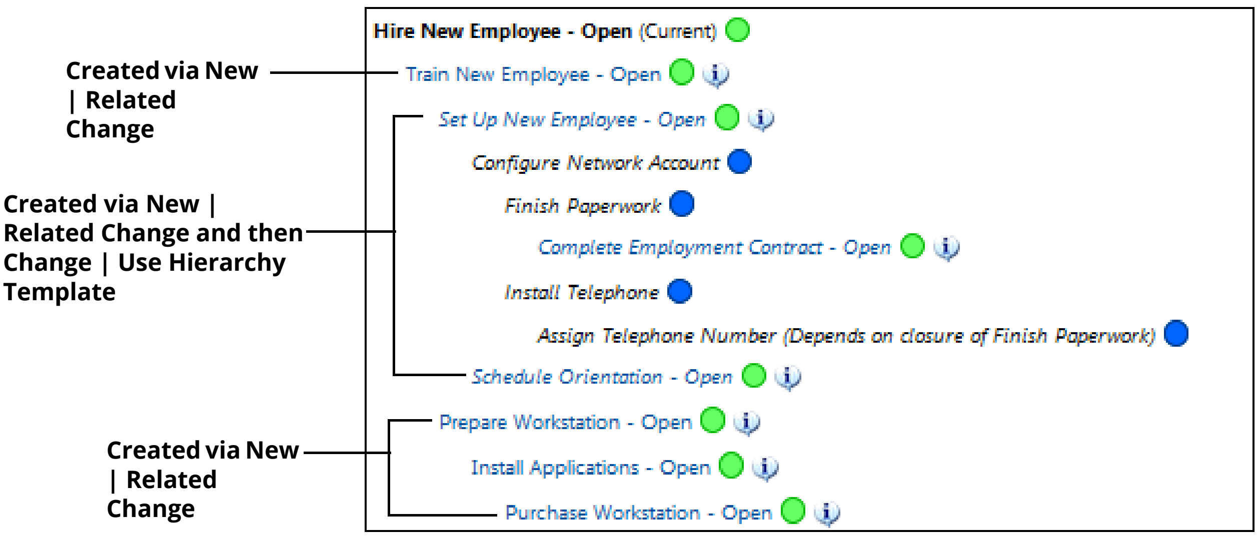
When the Schedule Orientation, Install Telephone, and Configure Network Account changes are closed, the Setup New Employee change can be closed.



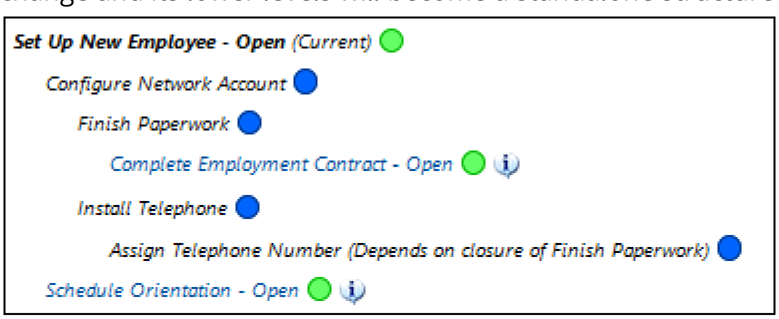
A configuration option can be set (on the Advanced tab in the Hierarchy Template screen) for a top level template to automatically close the top level change in a hierarchy if all lower level changes in the hierarchy are closed.

Removing and Deleting a Top Level Change in a Hierarchy Template Structure

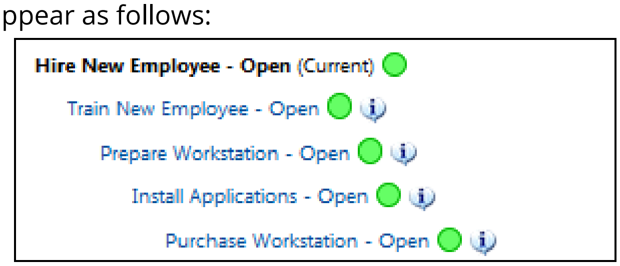
You can remove a top level change and its hierarchy template structure from a larger hierarchy structure. In the following example:



In the Set Up New Employee change, you can select Change | Hierarchy | Remove Change and Dependent Hierarchy. The Set Up New Employee change and its lower levels will become a standalone structure as shown below:

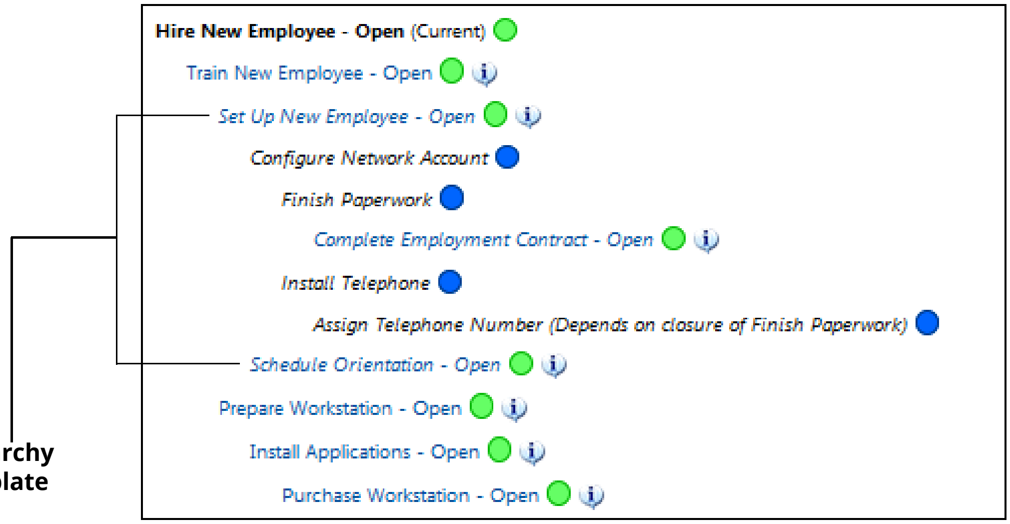


The rest of the structure would appear as follows:



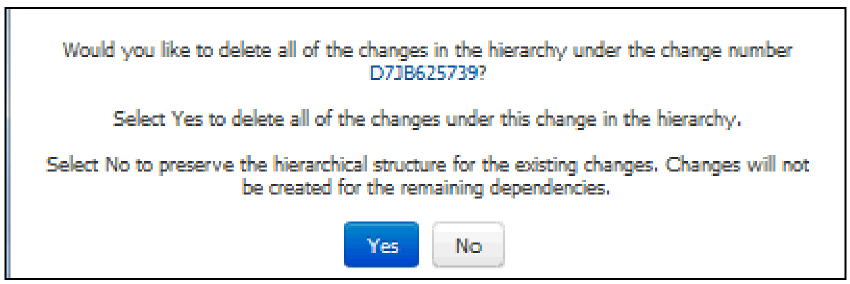
Deleting a Top-Level Change in a Hierarchy Template Structure

When you delete a top level change in a hierarchy template, you'll have the option of retaining its lower level changes. In the example below:

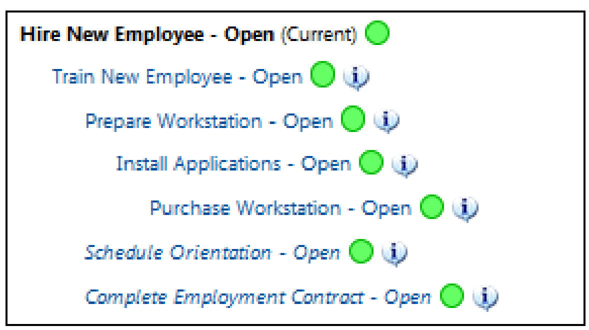


hierarchy template

If you delete the Set Up New Employee change, the following prompt appears:

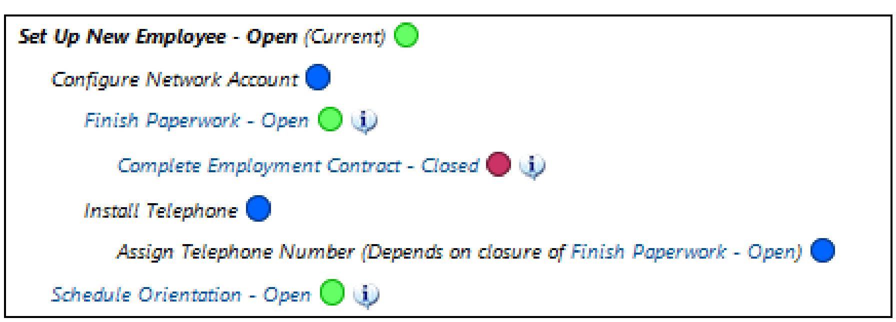


If you select No, the structure would appear as follows.

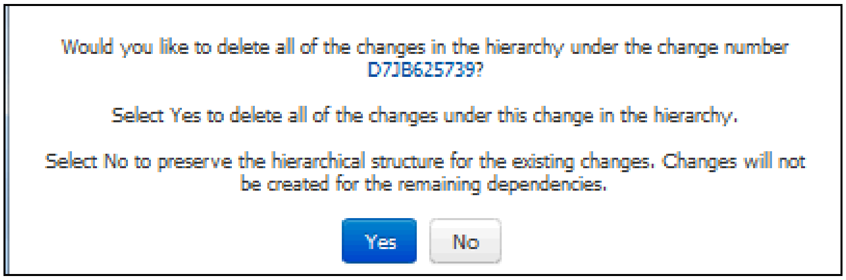


Deleting Lower Level Changes in a Hierarchy Template Structure

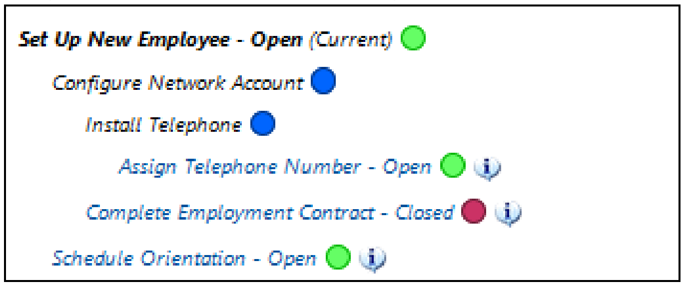
If you delete a change in a lower level of a hierarchy template structure, you have the option of deleting the change's lower level changes. Changes will be created from template placeholders above it if dependencies are met. In the following example:



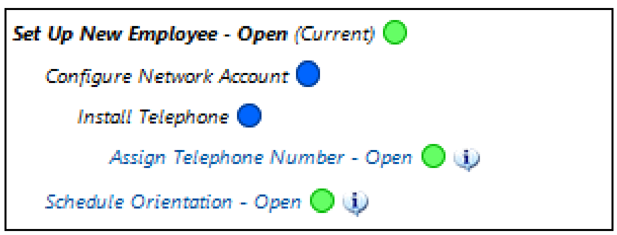
If you delete the Finish Paperwork change, the following appears:



- If you select No (you wish to retain its lower level changes), the lower level changes will go up a level. The structure will appear as shown in the example below; note that the Complete Employment Contract change is now one level below the Configure Network Account change.

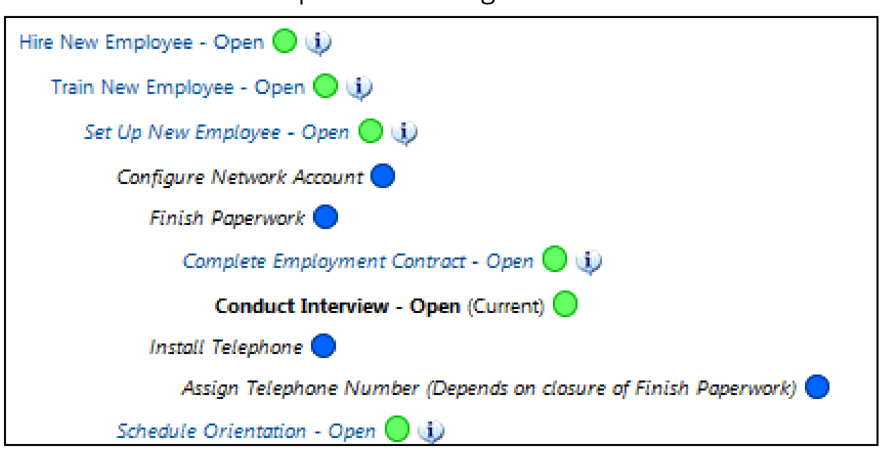


- If you select Yes (you wish to delete its lower level changes), lower level changes (Complete Employment Contract in this example) will be deleted. The example structure is as follows.

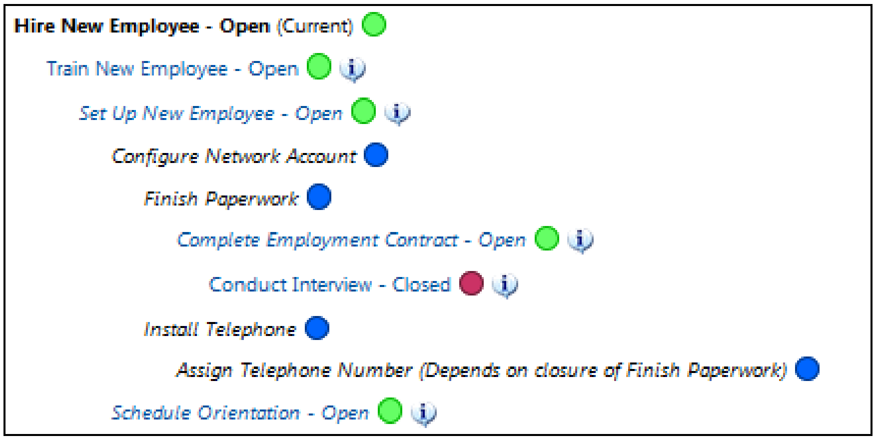


Working With Hierarchy Template and Related Change Structures

When a change structure contains both a dynamic hierarchy (created via the New | Related Change function) and a hierarchy template structure, actions of the changes in the dynamic hierarchy do not affect the changes in the hierarchy template structure above it. In the example below, the Conduct Interview change was is not part of the hierarchy template, and it was added via New | Related Change:



If you close the Conduct Interview change, the structure is as follows. Note that the changes in the hierarchy template structure are not affected by the closure.

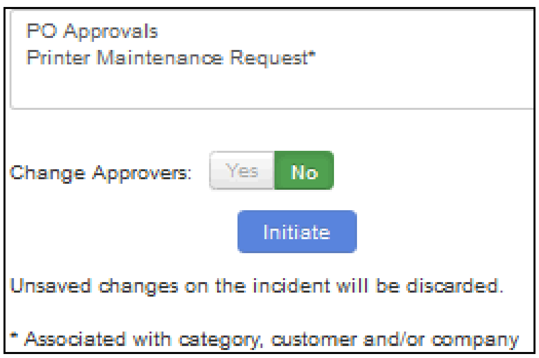


Configuring Approval Cycles

The Approval feature requires work items to be approved by designated approvers before most functions can be performed. (You can, however, enable modifications via a setting in the Incident, Change, and Purchasing Basics screens.) Approvers can be support representatives or customers.

Approval cycles are applied to incidents, changes, and purchase requests as follows:

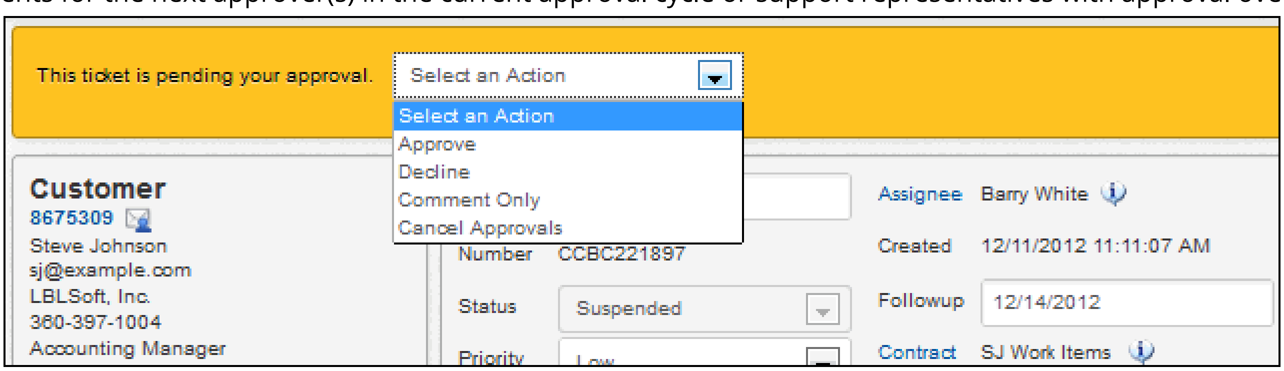
- The customer, company, selected category (for incidents and changes), or purchase request template has an associated approval cycle.
- A rule that initiates an approval cycle is in effect for an incident, change, or purchase that meets configured conditions. Multiple cycles can be specified for a rule group but only one cycle can be active at a time, and approval functionality is not affected by the business hours configured for a rule group. If a canceled or completed cycle needs to be run again, the rule it is linked to will need a condition that can be set on the work item or the support representative can initiate an ad hoc approval. If the cycle associated with a category is specified, the lowest level category is checked and if no cycle is associated, the next (higher) level is checked, and so on up the category hierarchy.
- An ad hoc approval cycle is selected by the assignee via the Ad Hoc Approval option. Note that an active ad hoc approval cycle for an incident or change will not be cancelled when the effective rule group changes; any approvals that are defined by the new effective rule group will initiate after the ad hoc cycle is approved.



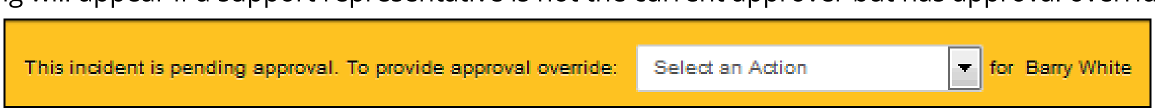
The status of the work item will change throughout the process as configured for the initial status, final approval, final decline, and cancellation. Notifications can be sent for approval events and verdicts.

Specifying a Verdict

When an approval cycle is in effect, an alert bar will appear with an action dropdown for specifying a verdict and/or comments for the next approver(s) in the current approval cycle or support representatives with approval override.



The following will appear if a support representative is not the current approver but has approval override:



The alert bar will only include a message stating "This <*work item type*> is pending approval" for support representatives who do not have approval override or are not the next approvers for the current cycle.

The following can be selected:

- **Approve** - If it is a concurrent cycle, the approval cycle will stop if the number of Approve verdicts specified for the cycle is reached. All approvers must specify an approval for a serial cycle.
- **Decline** - A Decline verdict requires an entry in the Comments field. In a serial cycle, the cycle reaches final decline if one of the approvers sets a verdict of Decline. In a concurrent cycle, the approval cycle will stop if the number of Decline verdicts specified for the cycle is reached. If any approval cycle results in a Decline verdict, no further cycles will apply.
- **Comments Only** - When a Comments Only verdict is specified, the comments will be included in notifications sent to designated recipients.
- **Cancel Approvals** - A Cancel Approvals verdict requires an entry in the Comments field, and the comment will be included in the Approval Audit History entry. If the Cancellation Status configured for the approval cycle is a Closed status, the comment is appended to the text in the Resolution field (for incidents), Results field (for changes), or Comments field (for purchase requests). An approval cycle can be cancelled by the customer or any support representative with Edit permission (whether or not they are an approver or have approval override).

A reminder notification can be configured to be sent a specified number of hours after the initial approval request is sent; it can be configured to be sent repeatedly until a verdict is specified.

If the status is changed to Closed via data override, the cycle will be cancelled and notifications will not be sent. Note that if an incident or change is reopened, approvals do not automatically restart.

If a rule group-required cycle is completed or canceled, the Initiate Ad Hoc Approval option will be available for initiating another approval cycle.

Configuration Overview

Do the following to configure approvals:

1. Use the Options and Tools | Automate | Approval Cycles screen to configure approval cycles and associated notifications.
2. If using the customer’s approver for a cycle, designate the approver via the Customer Profile screen.
3. If you wish to require incidents, changes, and/or purchase requests to be approved based on specified conditions, use the Rules and Rule Groups screens to configure the rule and specify the approval cycles to apply when the rule group is in effect.
4. If applicable, associate approval cycles with categories (for incidents and changes), customers, companies, and purchase request templates.
5. Use the Allow Approvers to Edit During Approval Cycle field in the Basics configuration screens to enable support representatives designated as approvers (or those with Approval Override) to have access to all functionality except Status in records in an approval cycle. Use the Recipient Notification Mappings field to select the recipients and notifications to be sent to others in the cycle that have previously approved the record.
6. If applicable, use the Rep Profile screen to enable support representatives to override an approval (specify a verdict) if not designated as an approver for the cycle in effect.
7. If customers will be approving, add the Approval button to the applicable display page via the mySupport | mySupport Options screen.

Creating an Approval Cycle

Use the Approval Cycle screen to configure approval cycles consisting of serial or concurrent approvers, notifications, and statuses to assign while the cycle is in effect, final approval/decline, and cancellation. The same approval cycles are used with incidents, changes, and purchase requests; however, you can designate statuses and notifications that are specific to each type of work item.

Name - Enter a name for the approval cycle.

Description - Enter a description of the approval cycle.

Available for Ad Hoc Use - Select Yes to enable the approval cycle to be available in the Incident, Change, and Purchase Request screens for support representatives to initiate on saved records.

Type of Approval - Select:

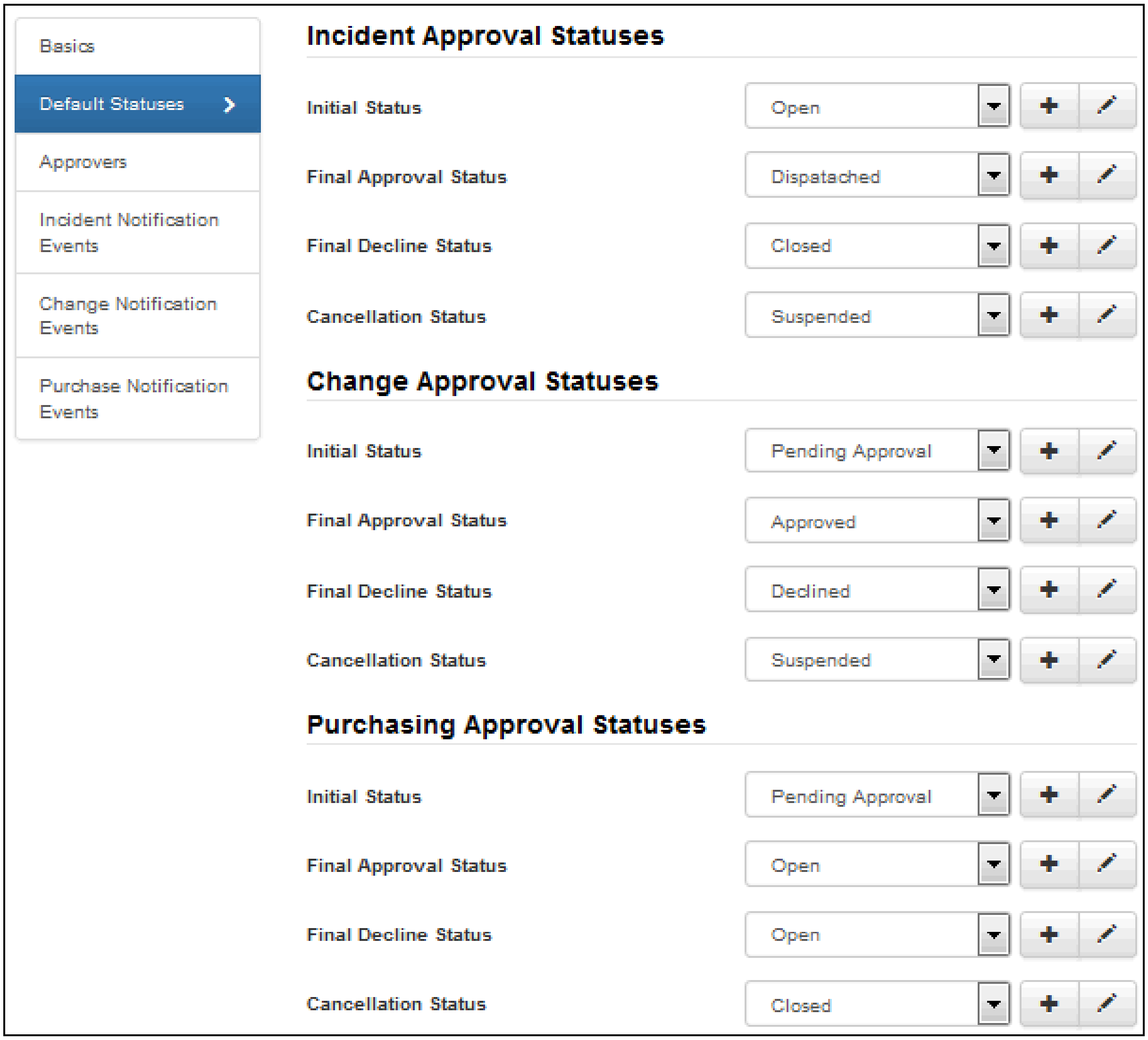
- Serial to enable approvers to specify a verdict one at a time in a designated order. All approvers must approve the incident or change (if enabled), and the cycle will stop if an approver specifies a Decline verdict.
- Concurrent to enable all approvers to specify a verdict at the same time. The cycle will complete after the number of Approve verdicts is equal to the number in the Number of Verdicts Required for Final Approval field. The cycle will stop after the number of Decline verdicts is equal to the amount specified in the Number of Verdicts Required For field.

Number of Verdicts Required for/Final Approval/Final Decline - This field appears if Concurrent is selected in the Type of Approval field.

- In the Final Approval field, select the number of Approve verdicts needed to complete the cycle.
- In the Final Decline field, select the number of Decline verdicts needed to stop the cycle.

Default Statuses

Use the Default Statuses tab to assign a status to each stage of the approval cycle.



Default Approval Incident/Change/Purchase Statuses - Select the status to assign at each stage of the approval cycle. Use the Create New and View/Edit icons to access the applicable Custom Status Label screen.

- In the **Initial Status** field, select the status to assign when an incident with the rule group is initially saved.
- In the **Final Approval Status** field, select the status to assign when:
  - For a serial cycle, all approvers have specified an Approve verdict.
  - For a concurrent cycle, the number of Approve verdicts is equal to the number in the Number of Verdicts Required for Final Approval field.
- In the **Final Decline Status** field, select the status to assign when:
  - For a serial cycle, an approver specifies a Decline verdict.
  - For a concurrent cycle, the number of Decline verdicts is equal to the number in the Number of Verdicts Required for Final Decline field.
- In the **Cancellation Status** field, select the status to assign when a support representative with Incident Edit permission or customer assigned to an incident specifies a **Cancel Approvals** verdict.

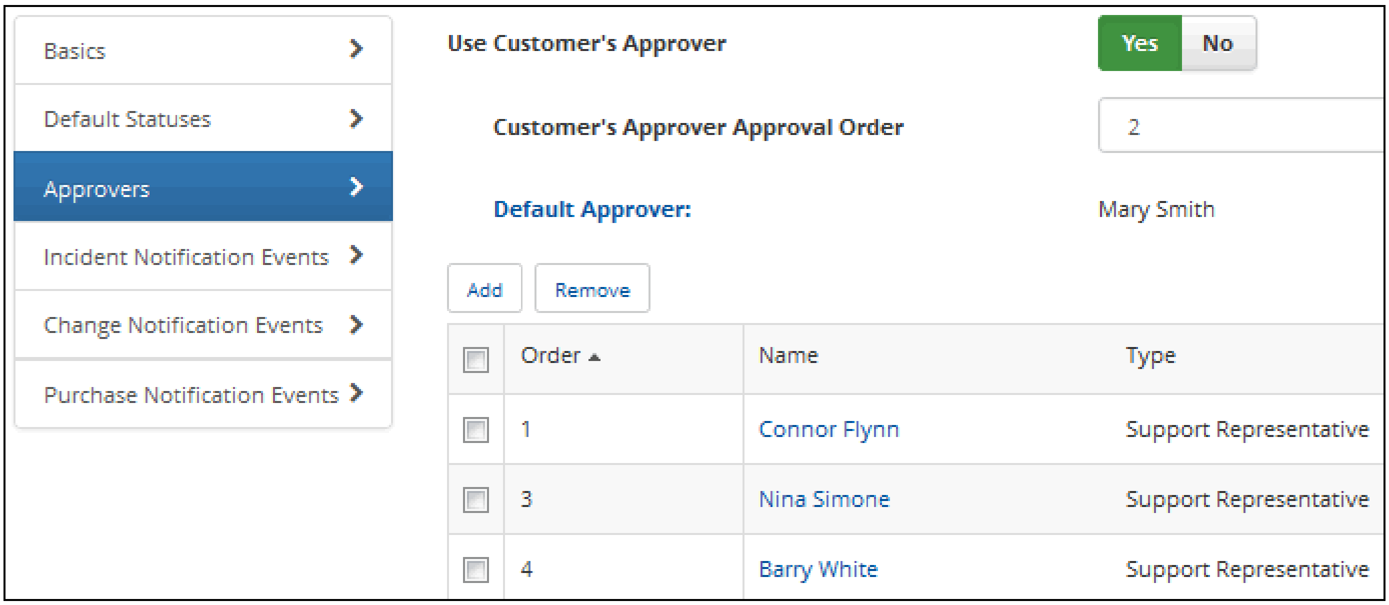
Specifying Approvers

Use the Approvers tab to specify the approvers for the approval cycle. Note that a support representative can change the approvers if an ad hoc approval cycle is initiated.

If a support representative is designated as an approver, any lower level permissions are overridden (for example, if the representative does not have permission to edit but is designated as an approver, a verdict can still be submitted).

Support representatives are designated as approvers in the Rep Profile screen, and a customer or support representative can be designated as an approver for a customer in the Customer Profile screen. If using Active Directory integration as a customer data source and a record in Active Directory has a value in the Manager field, the AD manager will be populated in that field.

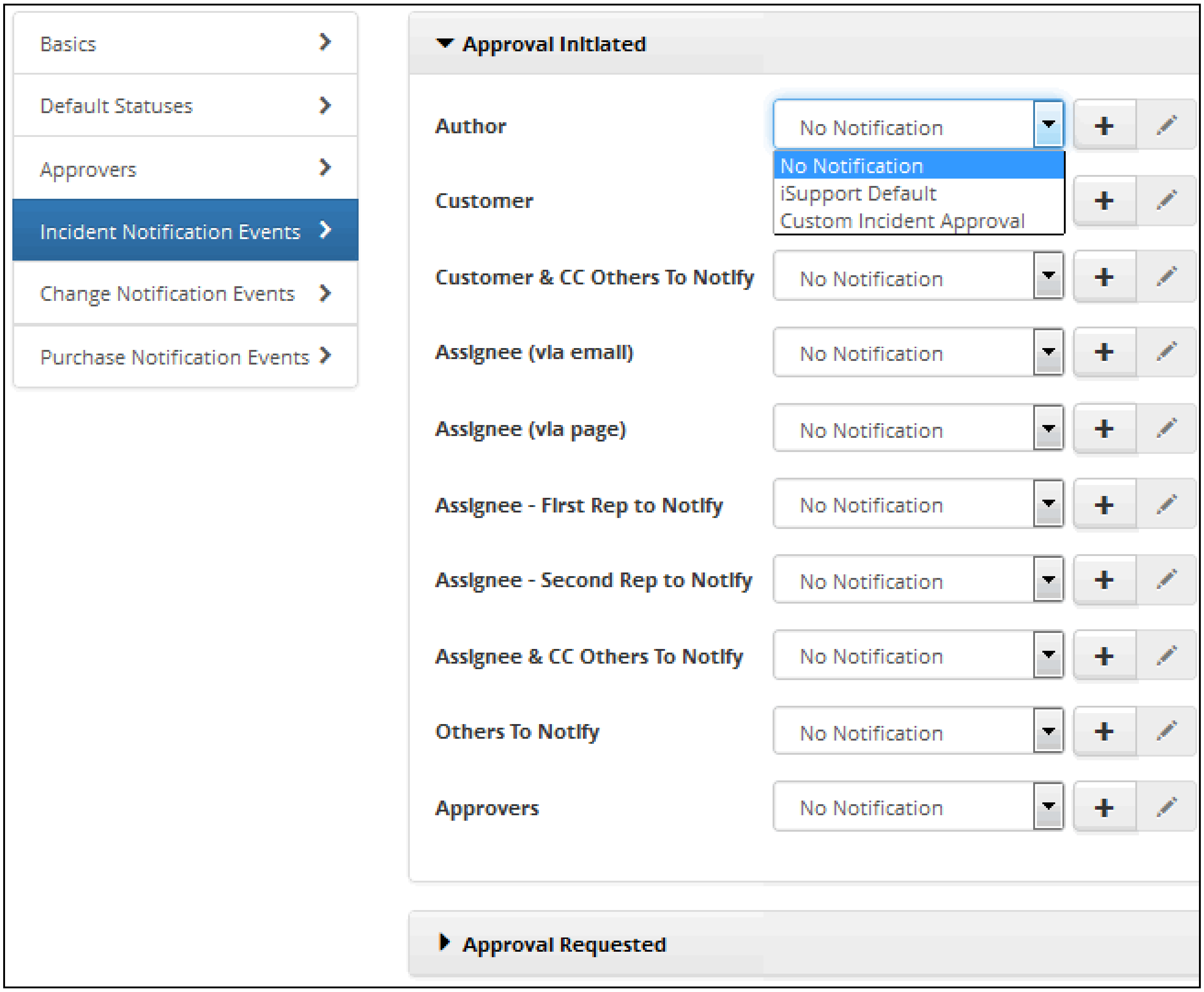
In the Use Customer's Approver field, select Yes if you wish to use the approver specified in the Approver field in the Customer Profile screen. If it is a serial cycle, use the Customer Approver Approval Order field to specify the position of the customer's approver in the order for the cycle. Use the Default Approver field to specify an approver to use if the Approver field is blank in the Customer Profile screen. Click the Add link to select support representative or customer approvers. Be sure to click the Add button at the bottom of the screen when finished. The selected approvers appear in a list; if it is a serial cycle, you can change the order in which approvers will specify a verdict by clicking the approver's name to display a numeric dropdown field in the Order column.



Configuring Approval Notifications

Use the Notifications tab to configure notifications to be sent for all approval events. For each event and recipient you can select iSupport's default notification, a predefined custom notification, or you can select Create New Custom

Notification to access the Custom Notifications screen to create one or view default notification text. Notification recipients can include both support representatives and customers, and the default text is different for each.



Approval Initiated - Select the recipients and notifications to be sent when the *<Incident/Change/Purchase>* is saved with an associated approval cycle.

Approval Requested - Select the recipients and notifications to be sent when the applicable work item requires approval. You can select Customer Approver, Support Rep Approver (via email), and/or Support Rep Approver (via page).

If a concurrent cycle is in effect, the notification will be sent to all designated approvers in the cycle. For example, if both Customer Approver and Support Rep Approver are selected, the notification will be sent to all of the customer approvers and support representative approvers for the cycle.

If a serial cycle is in effect, the notification will be sent to the next approver in the cycle.

Approval Reminder - This section appears when the Approval Requested Reminder Event is selected. Select Yes to enable a reminder notification to be sent on an interval basis if the approvers have not submitted a verdict after the approval request is sent.

Approval Requested Reminder - This section appears when the Approval Requested event is selected. Select Yes to enable a reminder notification to be sent if the approvers have not submitted a verdict after the approval request is sent.

Use the **Send Reminder <x> Hour(s) After Approval Request Sent** field to specify the number of hours after the approval request is sent in which to send the reminder notification. Use the Maximum Number of Reminders field to enter the maximum number of times in which the notification should be sent.

Select the recipients and notifications to be sent a reminder notification on an interval basis if the approvers have not submitted a verdict after the approval request is sent.

Notifications are sent on the schedule of the Approval Reminder agent on the Agents tab; be sure to enable and set the interval for this agent.

Request Approved - Select the recipients and notifications to be sent when an approver or support representative with approval override submits a verdict of Approved.

Request Declined - Select the recipients and notifications to be sent when an approver or support representative with approval override submits a verdict of Declined.

Final Approval - Select the recipients and notifications to be sent when an approver or support representative with Approval Override submits a verdict of Approved **and**:

- If a concurrent cycle is in effect, the number of approval verdicts is equal to the number specified in the Number of Verdicts Required for Final Approval field on the Basics tab.
- If a serial cycle is in effect, the approver is the last in the cycle.

Final Decline - Select the recipients and notifications to be sent when an approver or support representative with Approval Override submits a verdict of Declined:

- If a concurrent cycle is in effect, the notification is sent when the number of Decline verdicts is equal to the number specified in the Number of Verdicts Required for Final Decline field on the Basics tab.
- If a serial cycle is in effect, the notification is sent whenever a Decline verdict is submitted.

Comments Added - Select the recipients and notifications to be sent when an approver or support representative with Approval Override submits a comment.

Approval Canceled - Select the recipients and notifications to be sent when the approval cycle is canceled by the customer or a support representative with <*Incident/Change/Purchase*> Edit permission.

Configuring Rules and Rule Groups for Changes

Use the Change Rules screen to create **rules** that will perform actions when specified conditions are met. This functionality can be used to:

- Change values in the Assignee, Category, Status, Type, Customer, Impact, Urgency, Priority, Email Account, Due Date, Review Date, and Scheduled Implementation Date fields, as well as in any custom fields. An email server account and template can also be set for a change.
- Create a related change and apply a change template or hierarchy template
- Send a desktop or email notification
- Initiate an approval cycle
- Route via load balancing or the round robin method
- Execute a webhook for posting Change data to a web application

In order for a rule to be evaluated, it must be included in a **rule group**; rule groups are applied to changes through customers, companies, category combinations, and change and change hierarchy templates. (A default rule group will apply if none are applicable.) When a change is saved, the matching rule group is first determined. Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed.

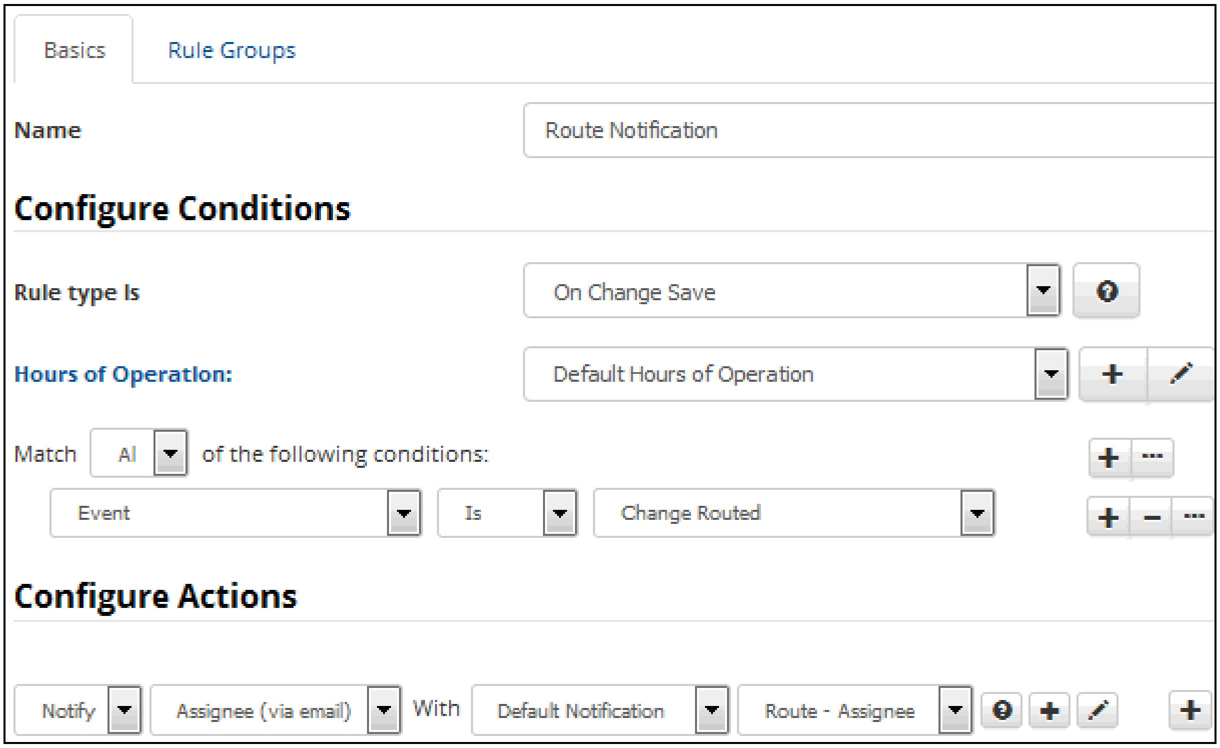
A default change rule group will be included in iSupport on installation or upgrade. Upgrades will convert previously configured Service Level Agreement functionality into rules and rule groups. You can use the Change Rule Groups screen to create new rule groups and assign them to customers, companies, category combinations, and change and change hierarchy templates. (You can also assign rule groups via those entry screens.) See "Creating Rule Groups" on page 77 for more information.

If a customer profile does not have an associated rule group, the rule group associated with the customer's company will be used for the customer. Any rule group associated with a change template or hierarchy template will take precedence for a change; in the absence of a template, a setting in the Change Basics configuration screen will determine what will take precedence if a change's customer and the selected categorization both have a rule group.

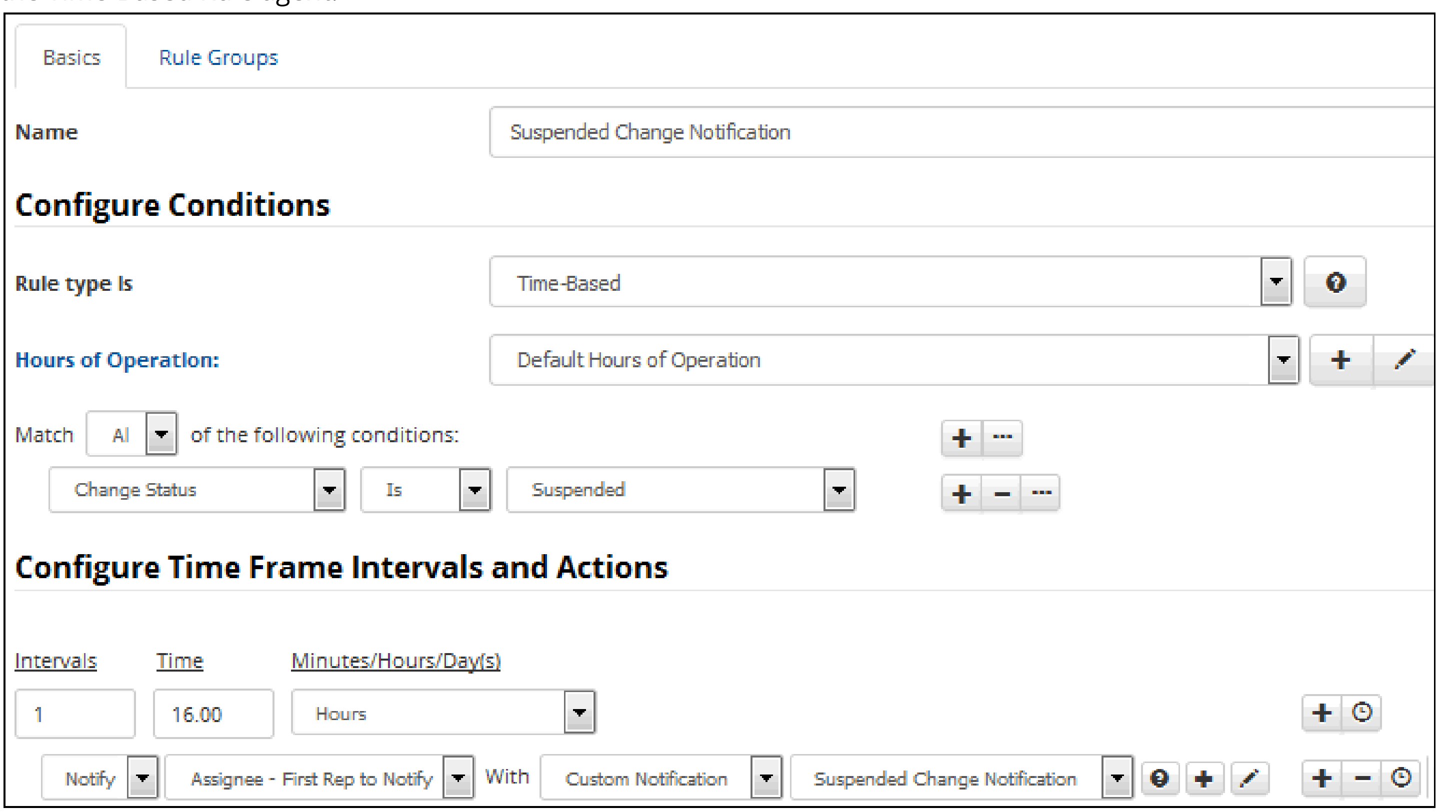
Note that rules in the associated rule group will not execute while a change is pending approval.

Rule Types

On Change Save rules do not incorporate time frames; when a change is saved, rules in the associated rule group are evaluated, and if true, their actions are performed.



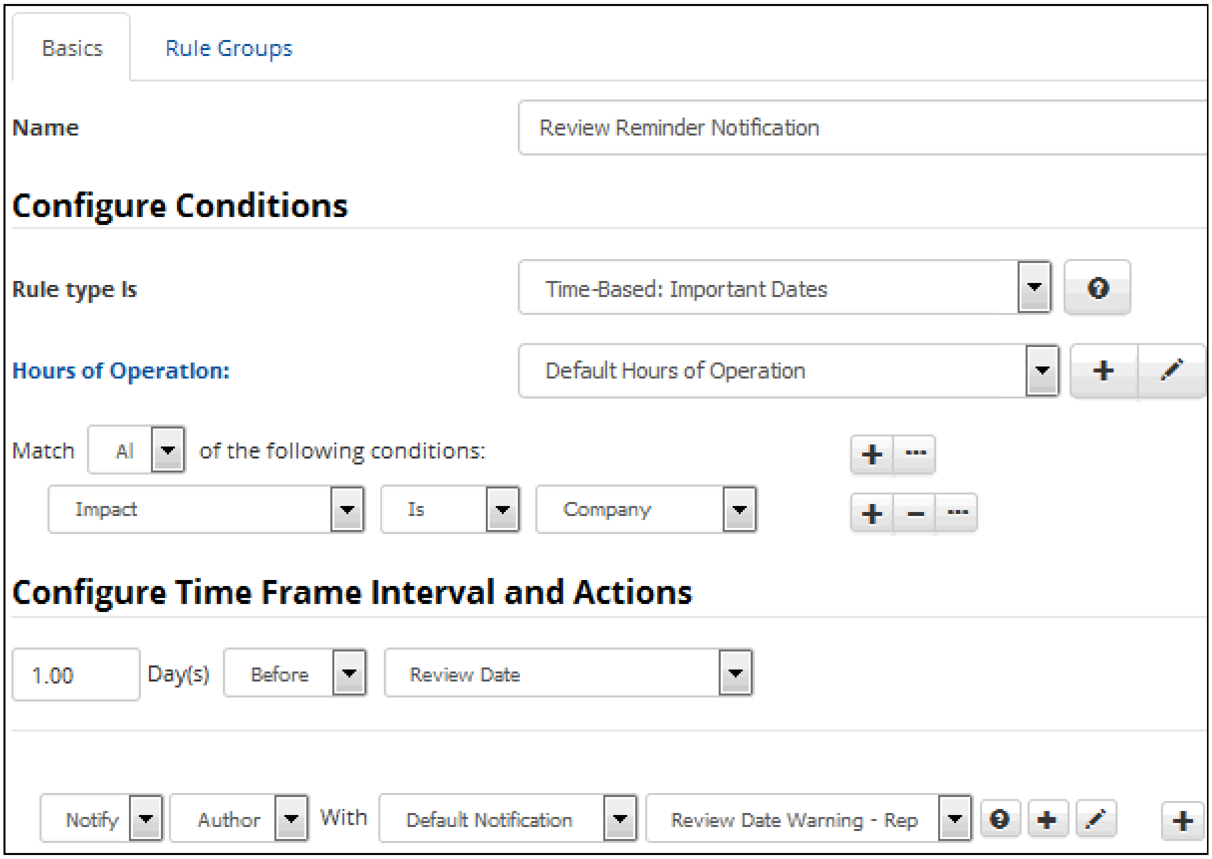
Time-Based and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon change save, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.



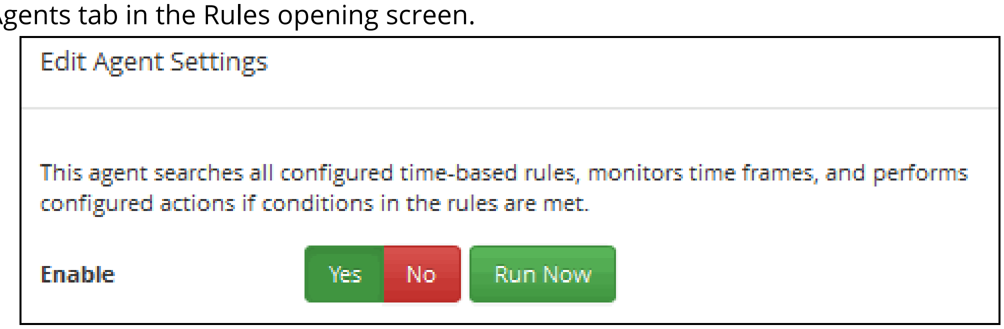
If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **Time-Based** rules will clear all pending actions and if conditions are met again the time frame will restart.
- **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

Time-Based: Important Dates rules will perform the specified action(s) when the defined number of days before or after the configured date (due date, review date, or implementation date) occurs.



If you are configuring Time-Based and Time-Based: Cumulative rules, ensure that the Time-Based Rules agent is enabled on the Agents tab in the Rules opening screen.



Note: If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

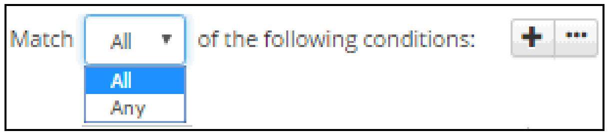
Creating Rules

Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections "Configuring Conditions" on page 66 and "Configuring Actions" on page 68 for more information. See "Creating Time Frame Intervals for Time-Based Rules" on page 73 for information on configuring interval time frames and actions to perform with each set of intervals.

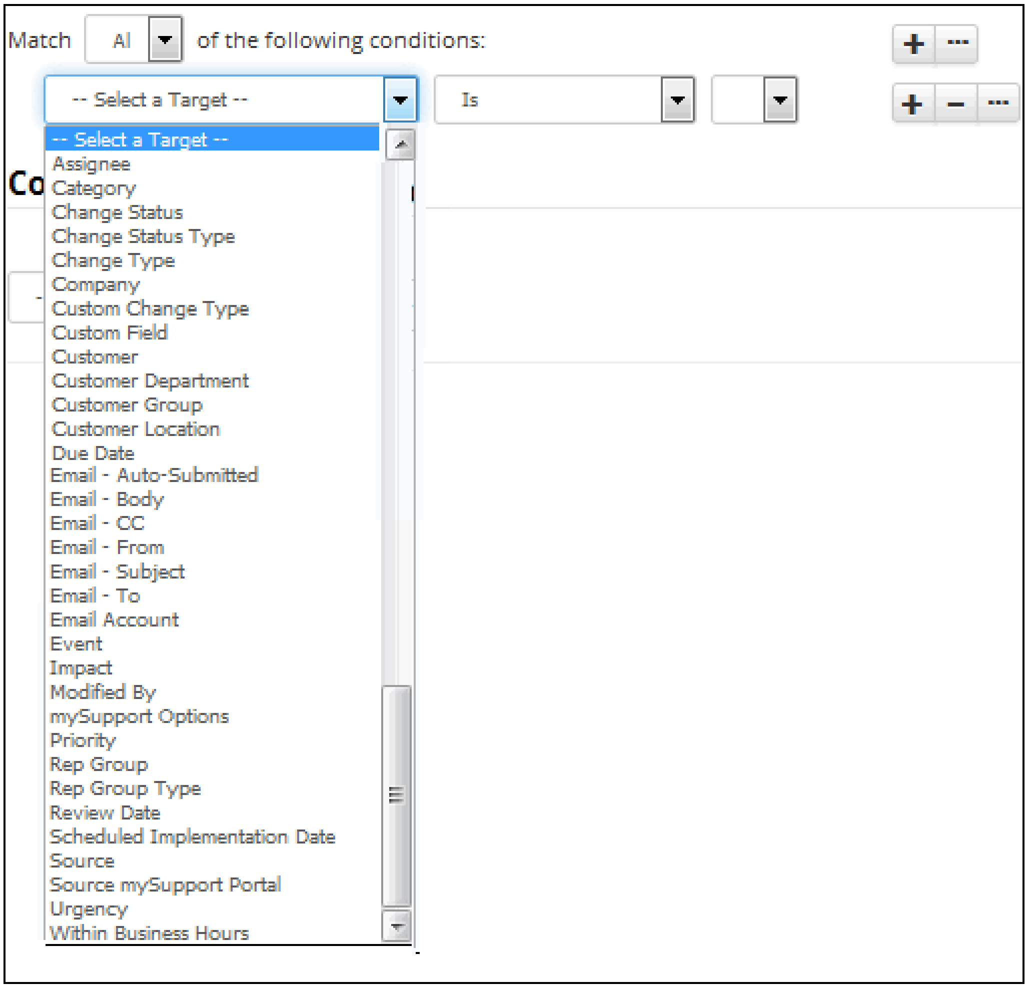
A configured **Hours of Operation** definition of 24 hours a day/seven days a week or selected date and time ranges can be used for the effective time frame for a time-based rule and for an on-save rule with a condition that includes "Within Business Hours". The default Hours of Operation definition assigned to a rule group will apply if no definition is selected for one of its rules. If a definition is selected for both a rule and its rule group, the definition assigned to a rule will take precedence.

Configuring Conditions

Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



Use the Add Condition + and Remove Condition − icons to display and remove a set of condition dropdown fields (a list of fields, a list of comparison methods, and a list of values applicable to the selected field) to evaluate upon change save. In the Select a Target dropdown, select what to evaluate: a change field or event, or whether it is within business hours.

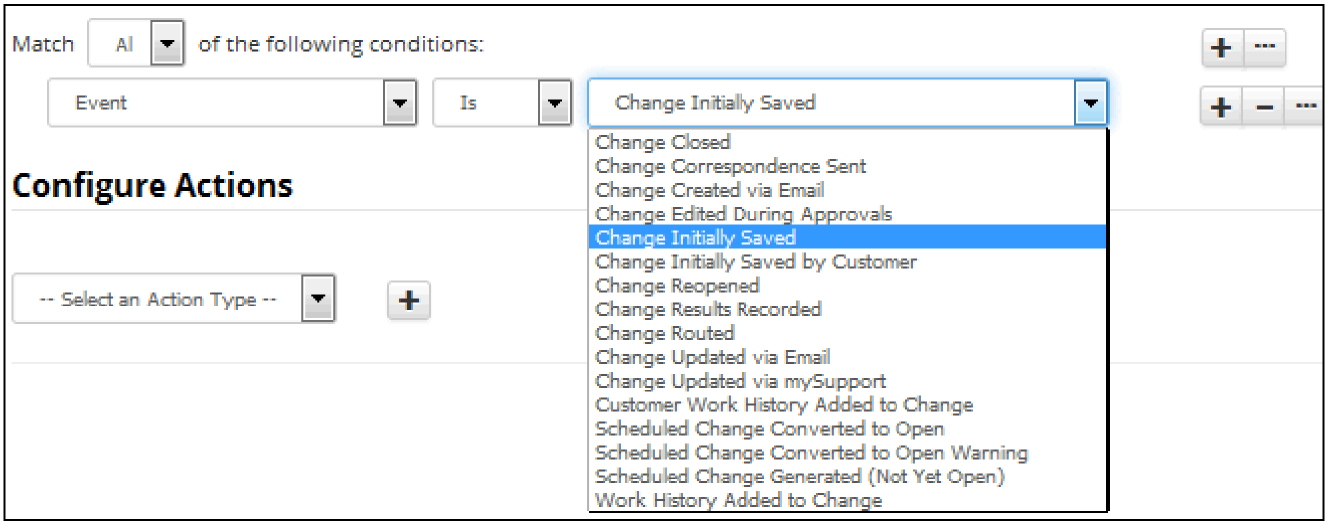


In the next dropdown, select the comparison method.

Note that:

- **Contains** returns a true result if the value is included in the field but other characters are included in a field as well; the value can be embedded in a word.
- **Is** returns a true result if the value is the only set of characters included in a field.

Finally, select the value to be used with the comparison method.

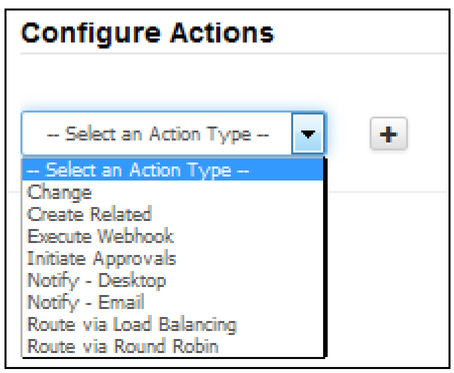


Note: If a rule contains a condition with the Customer Work History Added or Work History Added to Change event, the rule will be triggered immediately when the event occurs (even if the change hasn't been saved). Conditions for all of the rules in the rule group will be evaluated and actions will be performed if conditions are met. Any other modifications in the change will not be saved until the support representative saves the change.

Click the Add Condition + icon if you wish to include another condition. You can use the Add Condition Group ··· icon to put a set of conditions to be evaluated together in a group.

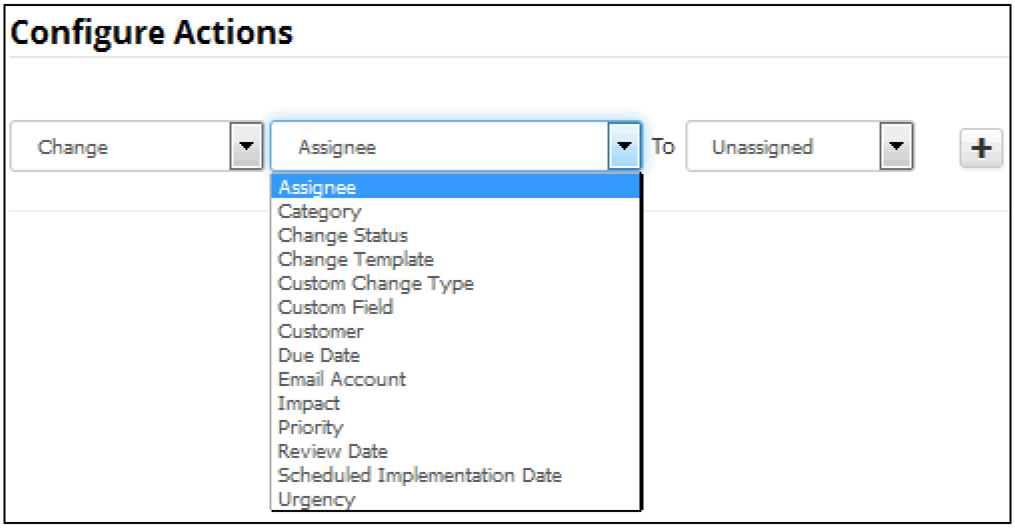
Configuring Actions

Use the Actions section to select the actions to perform when the conditions are met. After creating the first action you can use the Add Action + icon to create another action. Use the Remove Action − icon to remove any action lines.

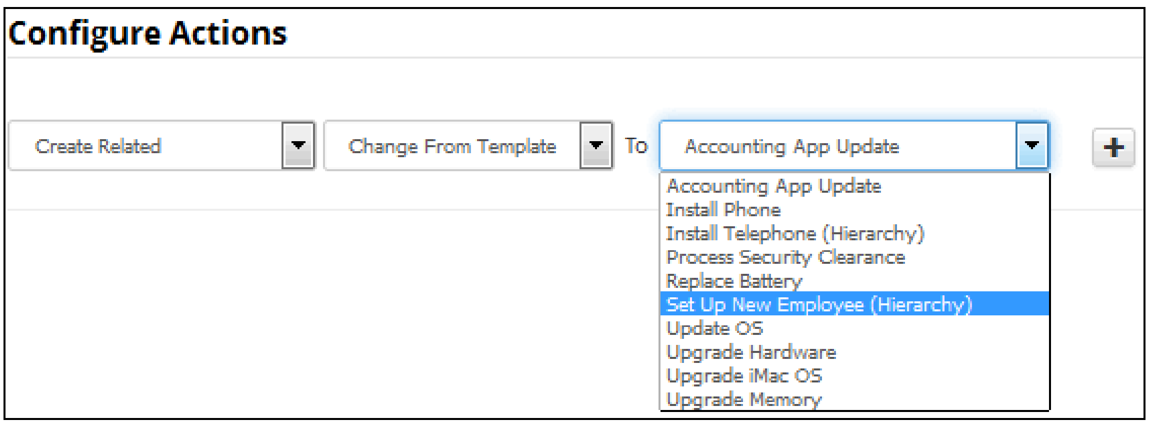


You can configure the following actions:

- **Change a field** by selecting Change, the field to change, and the value to change it to.

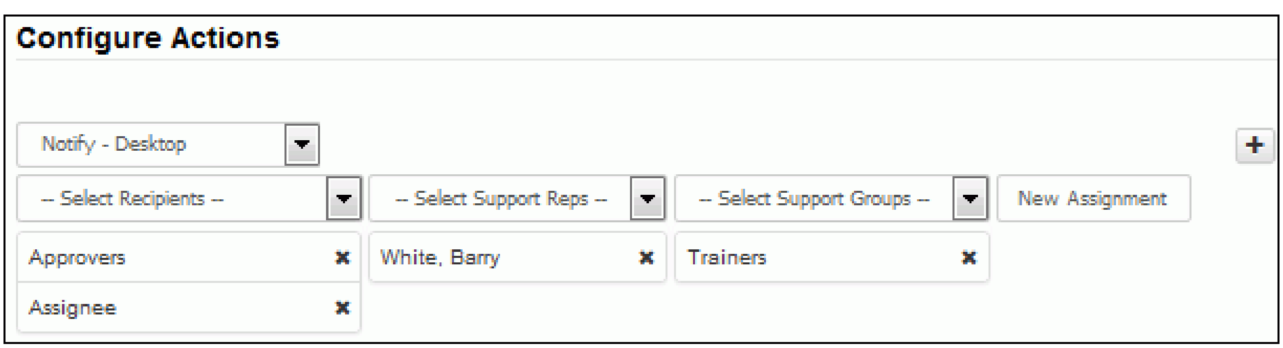


- **Create a related change** and apply a change template or hierarchy template by selecting Create Related and the template to apply.

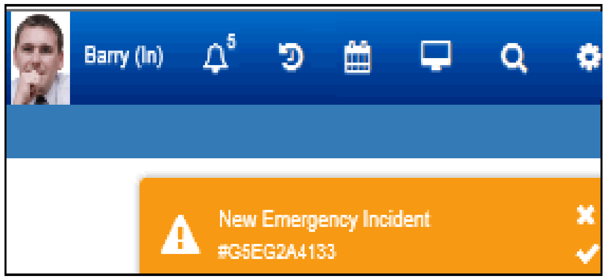


- **Execute a configured webhook** for posting Change data to a web application. See "Configuring Webhooks" on page 34 for more information.

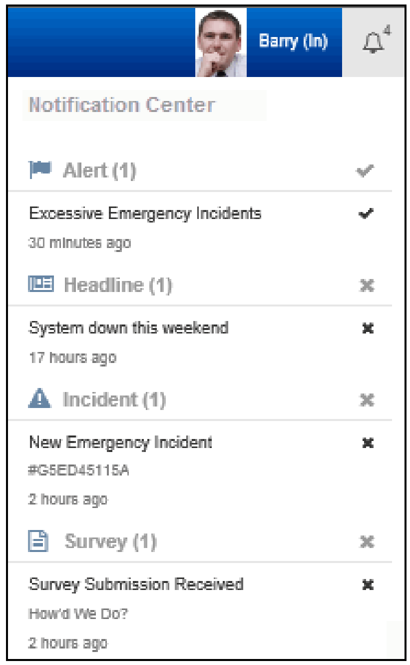
- **Send a notification** via desktop notification or email.
  - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



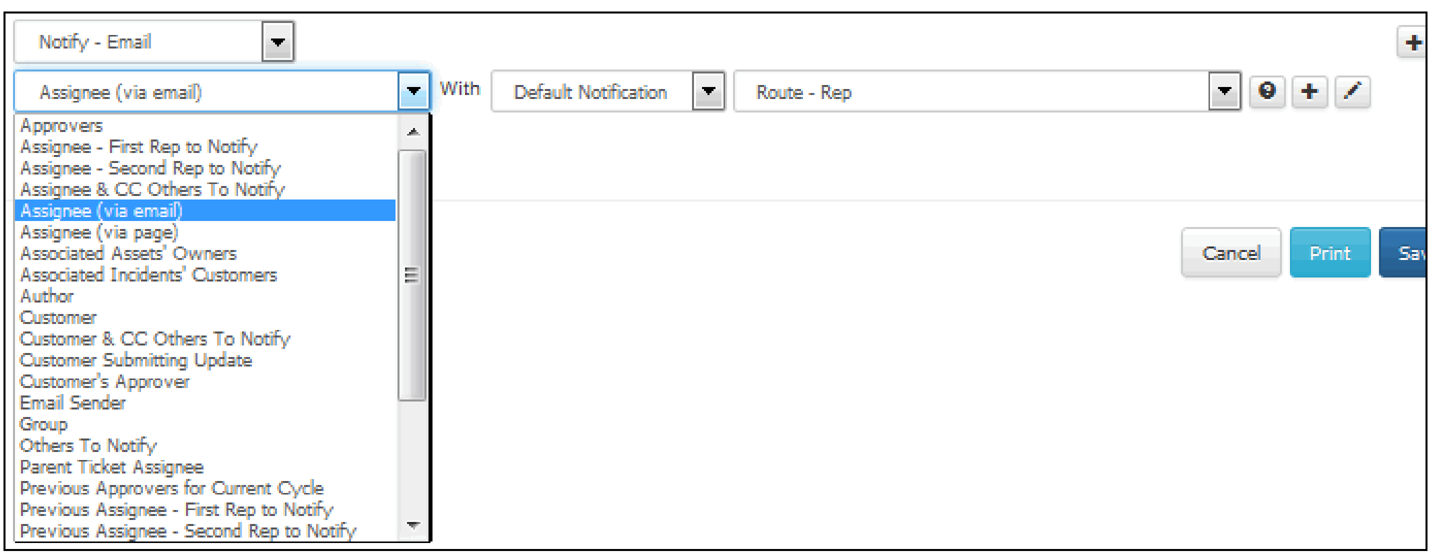
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.

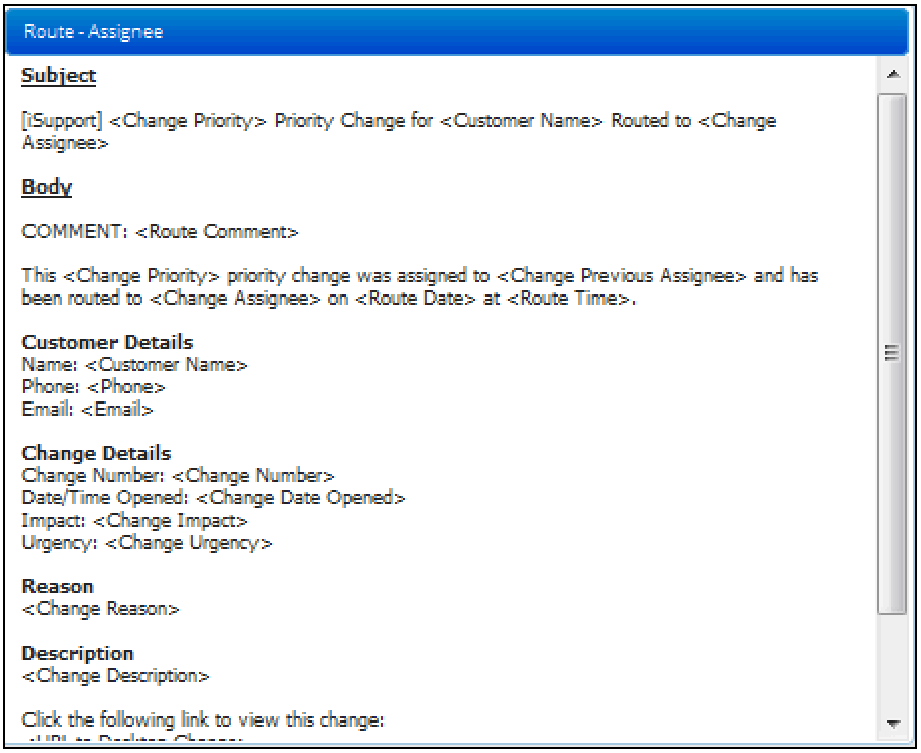


- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.

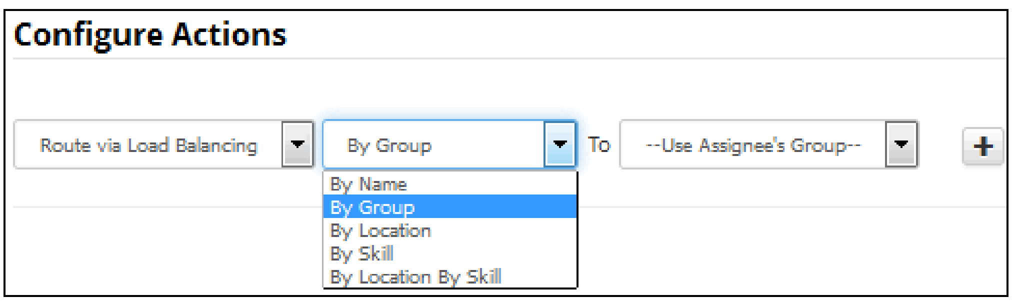


You can select the default or a custom notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient. Use the Create New + and View/Edit icons to access the Custom Notification screen.

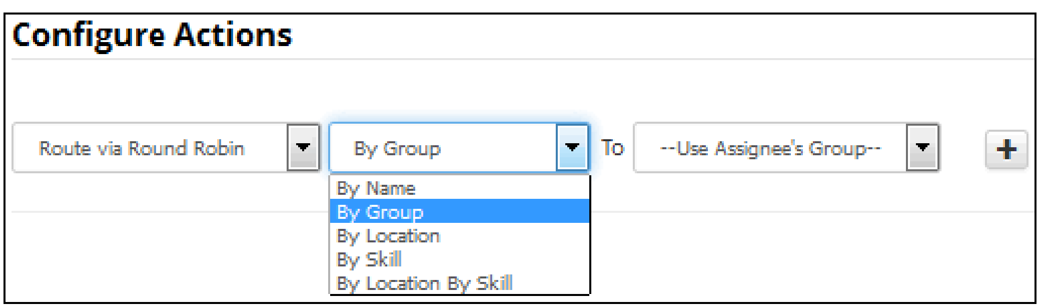
Click the Show Notification icon to display the contents of the selected notification.



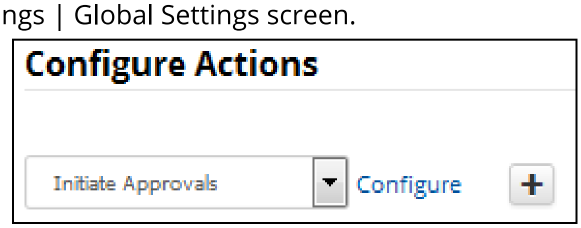
- **Route the Change record via load balancing** by selecting Route via Load Balancing, the route method, and the recipient if applicable. Load-balanced routing is enabled on the Change Management tab in the Feature Basics screen.



- **Route the Change record via round robin** by selecting Route via Round Robin, the route method, and the recipient if applicable. Round robin routing is enabled on the Change Management tab in the Feature Basics screen.

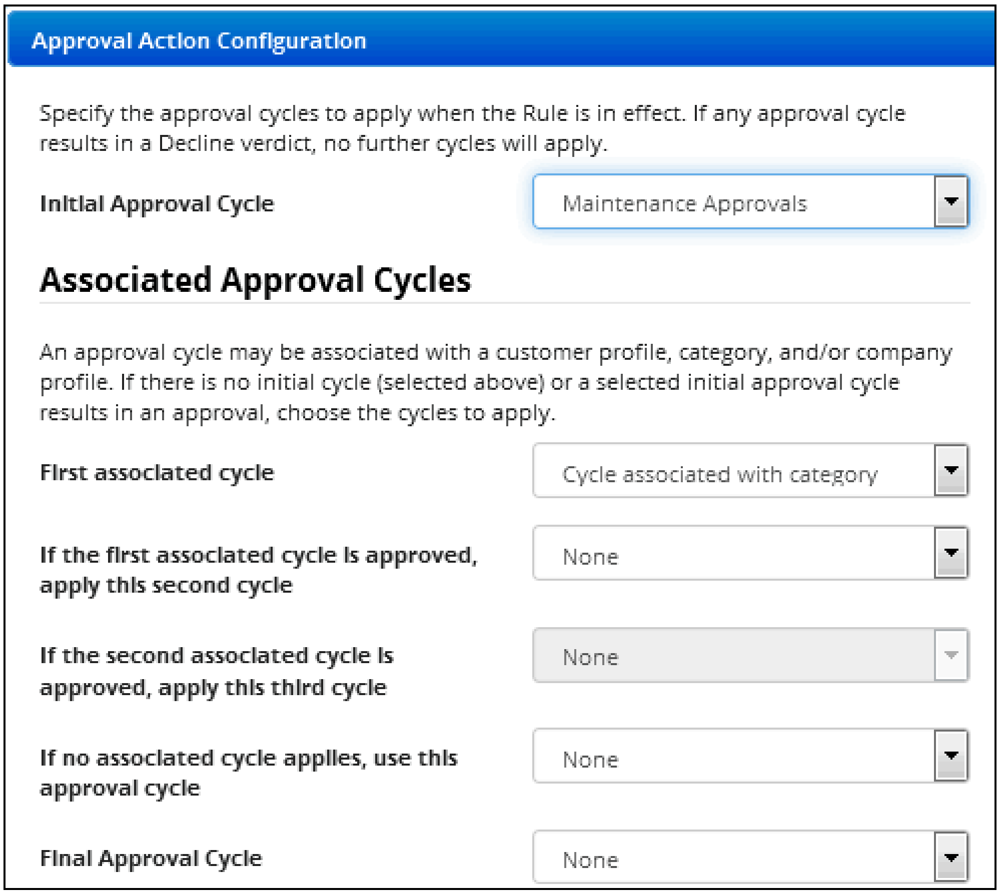


- **Initiate approvals** by selecting Initiate Approvals and clicking the Configure link. Approval cycles are enabled on the Basics tab in the Core Settings | Global Settings screen.



iSupport's Approval feature requires a change to be approved by designated approvers before it can be closed. The rule in effect can initiate one or more approval cycles, and approval cycles can be associated with customers, companies, categories, and change and hierarchy templates. See "Configuring Approval Cycles" on page 56 for information on creating an approval cycle, specifying approvers and statuses, and configuring approval-related notifications via the Approval Cycle configuration screen.

The Approvals dialog appears for you to specify the initial approval cycle, any additional cycles to apply if there is no initial approval cycle or the initial cycle results in an approval, and the final cycle to apply. Note that any changes to these settings will not affect current changes pending approval, and rules in the associated rule group will not execute while a change is pending approval.



Initial Approval Cycle - Select the predefined approval cycle to apply when the rule group is in effect for the change.

First Associated Cycle - Select the approval cycle to apply if there is no initial approval cycle or the cycle specified in the Initial Approval Cycle field results in an approval. You can select Cycle Associated With Customer, Cycle Associated With Category, or Cycle Associated with Company.

If the First Associated Cycle is Approved, Apply This Second Cycle - This field appears if an associated cycle was selected in the previous field. Select the approval cycle to apply if the cycle specified in the First Associated Cycle field results in an approval. You can select Cycle Associated With Customer, Cycle Associated With Category, or Cycle Associated with Company.

If the Second Associated Cycle is Approved, Apply This Third Cycle - This field appears if an associated cycle was selected in the previous field. Select the approval cycle to apply if the cycle specified in the previous field results in an approval. You can select Cycle Associated With Customer Recipient, Cycle Associated With Category, or Cycle Associated with Company.

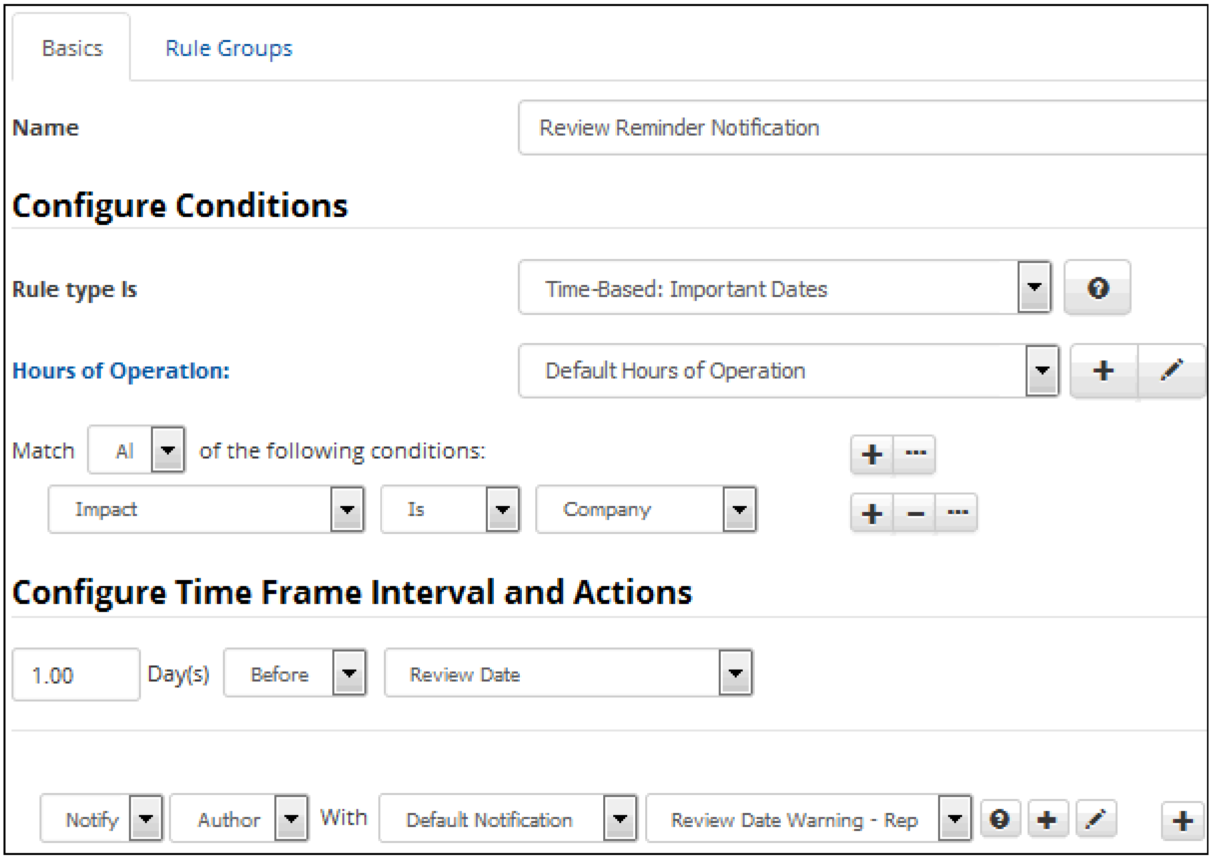
If No Associated Cycle Applies, Use This Approval Cycle - This field appears if Cycle Associated With Customer, Cycle Associated With Category, or Cycle Associated with Company was selected in one or more of the previous three fields. Select the predefined approval cycle to apply if there are no approval cycles associated with the customer, customer's company, or categorization of the change.

Final Approval Cycle - Select the predefined approval cycle to apply after all previously applied cycles result in an approval.

Creating Time Frame Intervals for Time-Based Rules

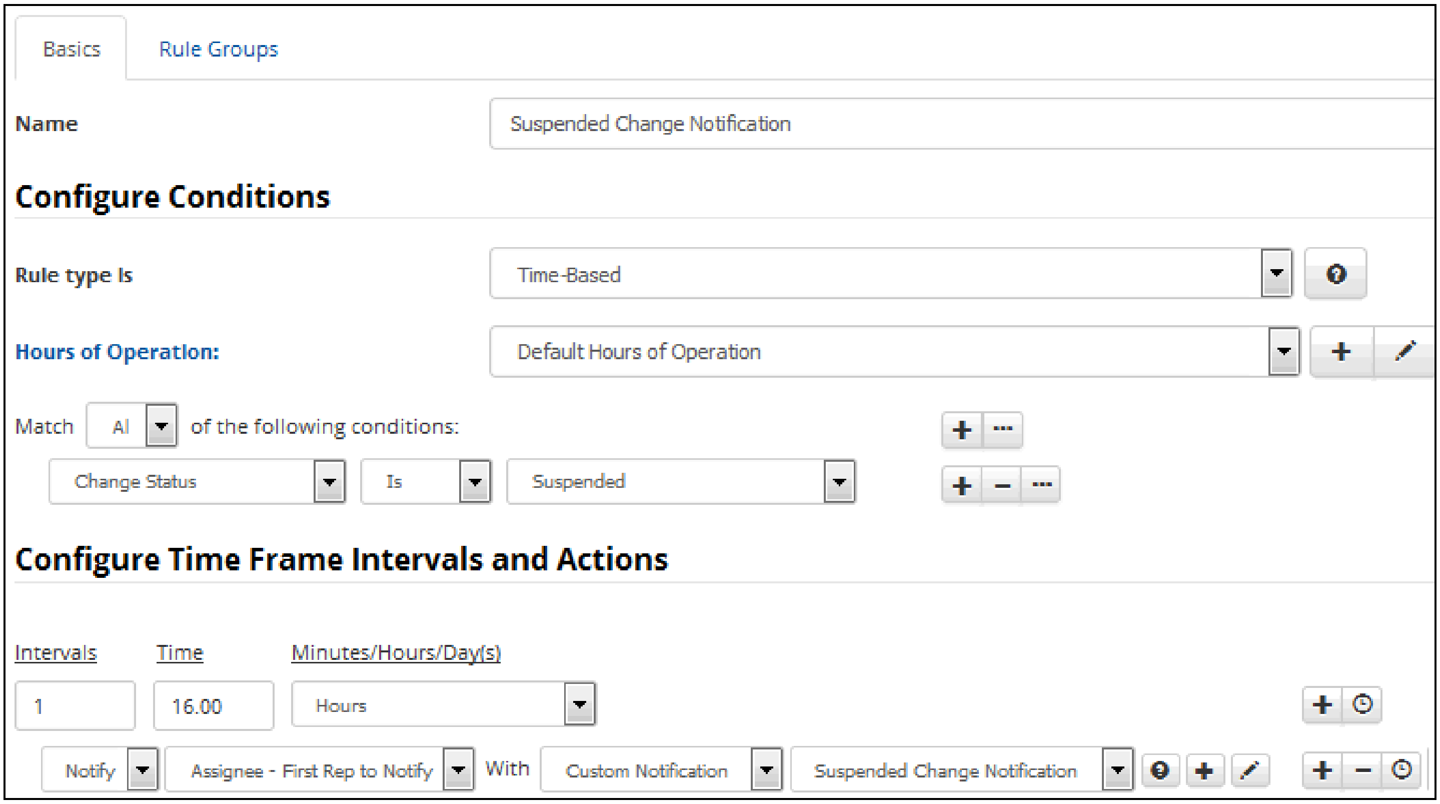
Time-Based: Important Dates Rules

A Time-Based: Important Dates rule will display a field for entering a number of days and a Before/After dropdown; the specified action(s) will be performed when the defined number of days before or after the change's due date, review date, or scheduled implementation date occurs.



Time-Based and Time-Based: Cumulative Rules

With Time-Based and Time-Based: Cumulative rules, the Time Frame Interval Settings section will include Intervals, Time, Minutes/Hours/Day(s) fields as well as a set of fields for entering an action to be performed when the condition is met for the interval time frame. The difference between these rules is that, if conditions change prior to the configured interval settings, **Time-Based** rules will clear all pending actions and the time frame will restart if conditions are met again; **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

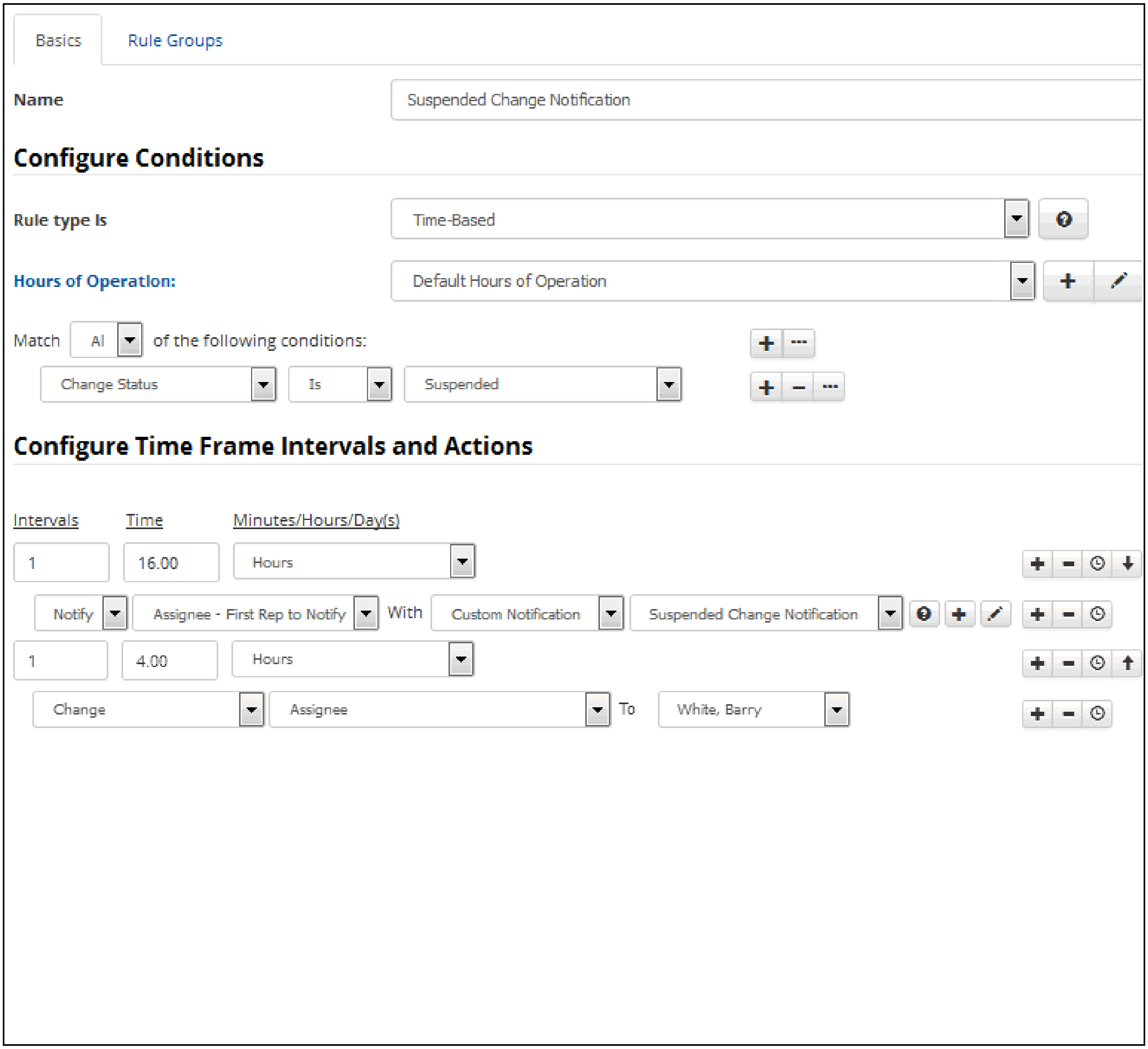


In the Configure Time Frame Intervals and Actions section, use the Intervals field to specify the number of times a time frame should be established and monitored, and use the Time and Minutes/Hours/Day(s) fields to specify the amount and unit of time (in minutes, hours, or days) in the time frame. *Note that the Day(s) option is calculated with one day equal to 24 business hours.* Use the dropdowns in the indented actions line to specify the actions to perform if conditions are met for that interval time frame. In the example above, the change will be monitored for 16 hours after initial save; if the change status remains at Suspended for the entire 16 hours, the Suspended Change notification will be sent to the assignee's first rep to notify.

History entries related to time-based rules will include the term "exceeded" if conditions have not been met within a defined interval, and the term "fulfilled" if a rule is invalidated or reset due to a change in rule configuration.

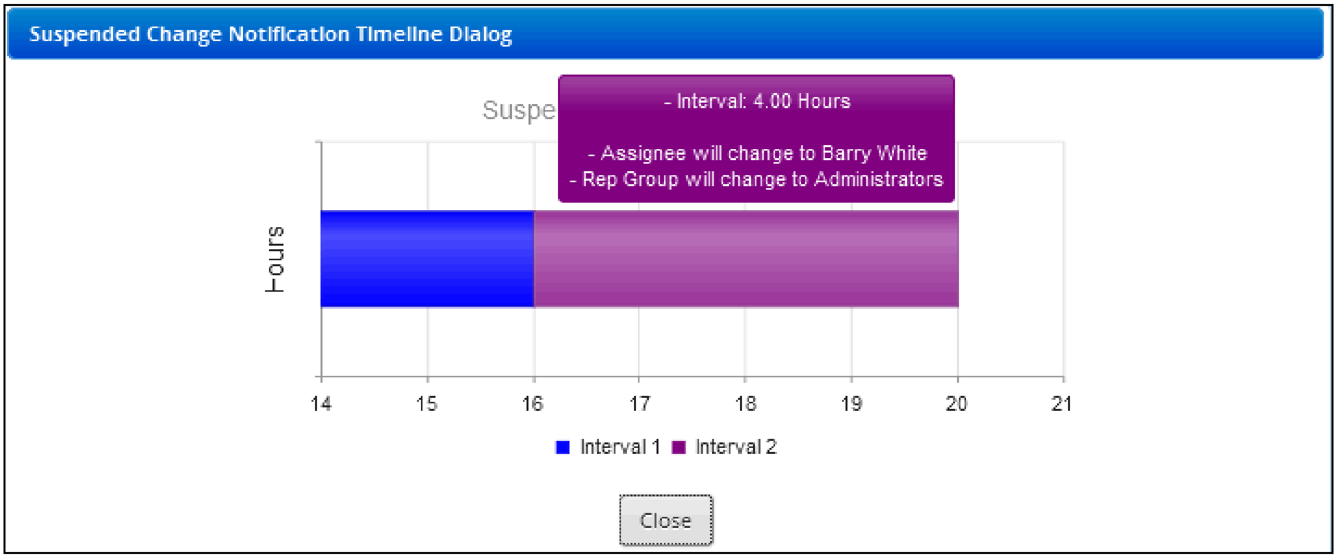
Configuring Multiple Time Frame Intervals

You can use the Add Interval icon to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up icons will appear for changing the order in which the interval time frames will be evaluated. In the example below, the change will be monitored for an eight hour time frame and if the priority remains at Emergency for the entire eight hours, the Emergency Priority Warning - Rep notification will be sent to the assignee via page. The change will then be monitored for an additional four hour time frame and if the priority remains at Emergency for the entire four hours, the change will be reassigned to the support representative Barry White.



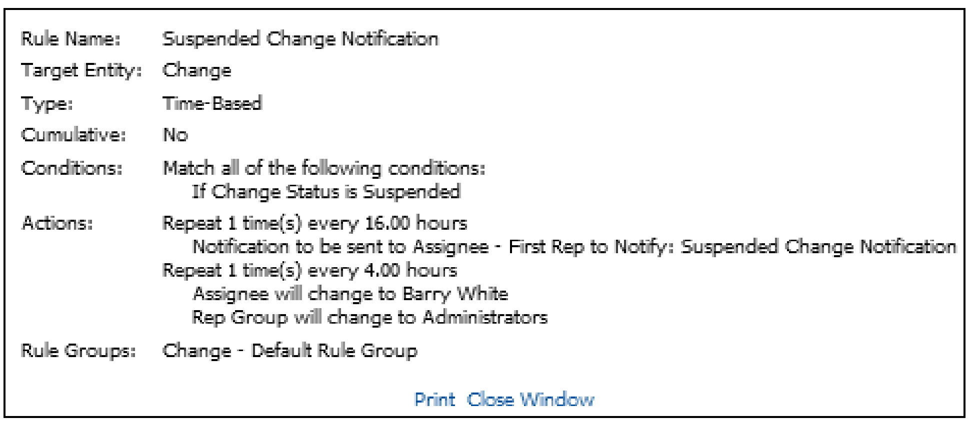
Displaying a Timeline for Configured Time Frame Intervals

Use the View Timeline button at the bottom of the screen to display a dialog with a gauge chart depicting the time frames for each interval; actions will appear when you hover over a time frame with your mouse.



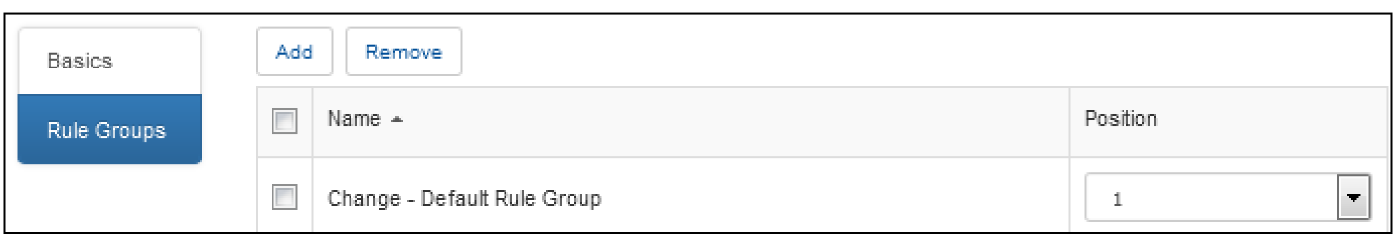
Printing a Rule

Click the Print button to display a summary of your entries; you can click the Print link in the dialog to send the information to the printer.

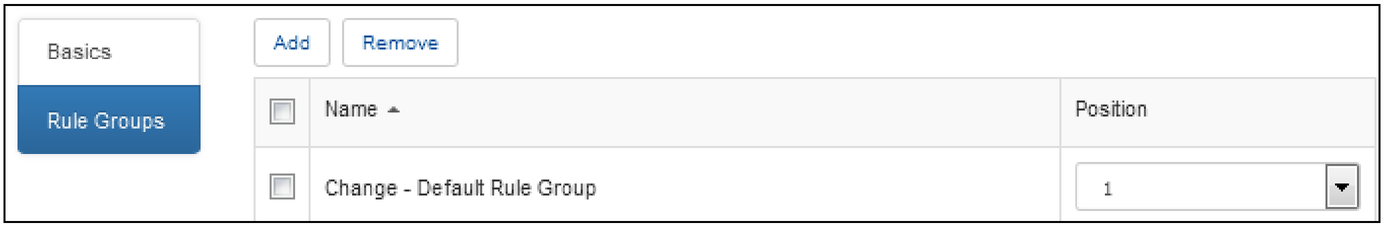


Associating Rules With Rule Groups

After creating a rule, you'll need to include it in a rule group. You can do this via the Rule Group tab in the Rules screen, or via the Rule Group screen. On the Rule Groups tab, click the Add link. Rule groups configured via the Rule Group screen appear; select the applicable group(s) and click OK.



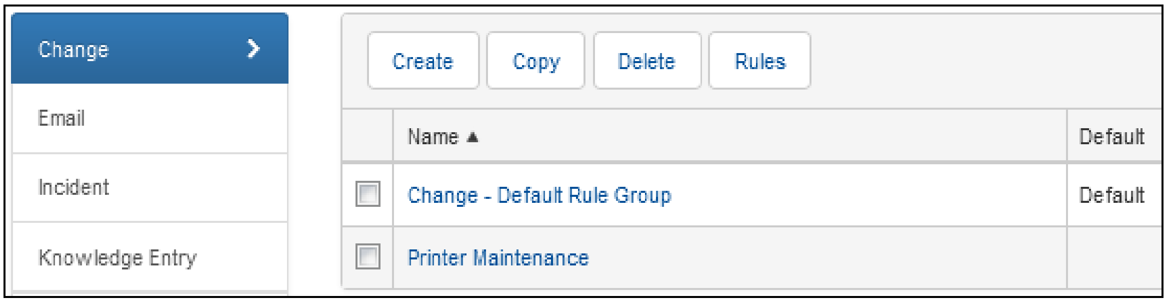
The rule group displays along with its position as shown below:



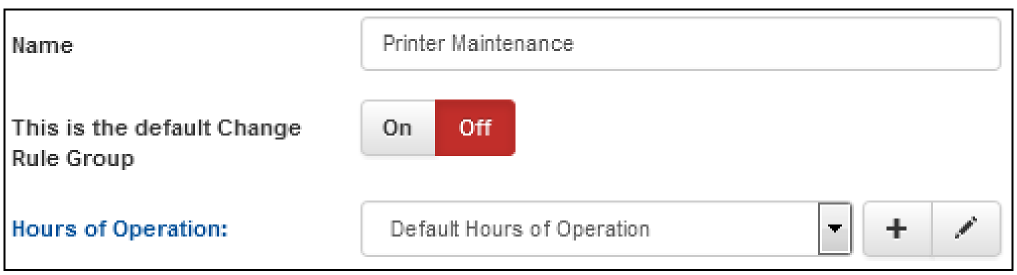
All rules in the rule group associated with a change are evaluated when a change is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

Click the Create link in the Change Rule Groups screen to create a rule group that can be used as default and/or applied to customers, companies, categories, and templates and hierarchy templates.



Complete the fields at the top of the Rule Groups screen.



Name - Enter a name for the rule group; this name will appear in the Change screen when the rule group is in effect for a change.

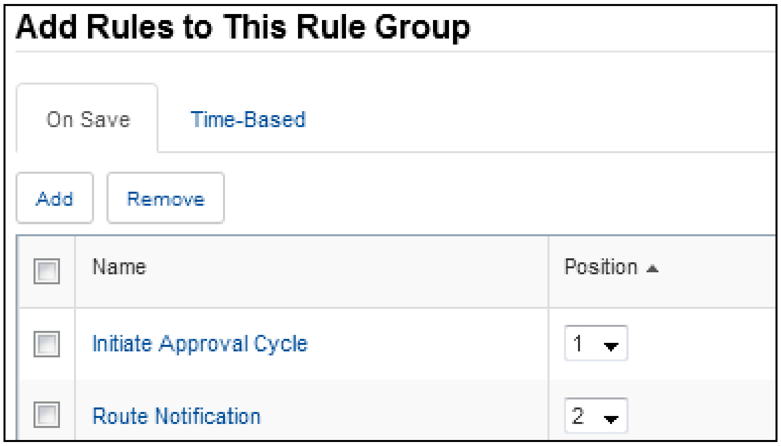
This is the Default Change Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the categorization, change or hierarchy template, or customer, associated with a change.

More than one rule group may apply to a change; if a change or hierarchy template selected for the change has a rule group, it will override any other rule group that may apply. Use the Winner if Both Customer and Category Rule Groups are Being Used field in the Change Basics screen to specify what is to take precedence if a change's customer and categorization both have a rule group.

Default Hours of Operation - Select the Hours of Operation definition that will apply if no definition is selected for a time-based rule or for an on-save rule with a condition that includes "Within Business Hours" in the rule group. Use the Create New + and View/Edit icons to access the Hours of Operation definition screen.

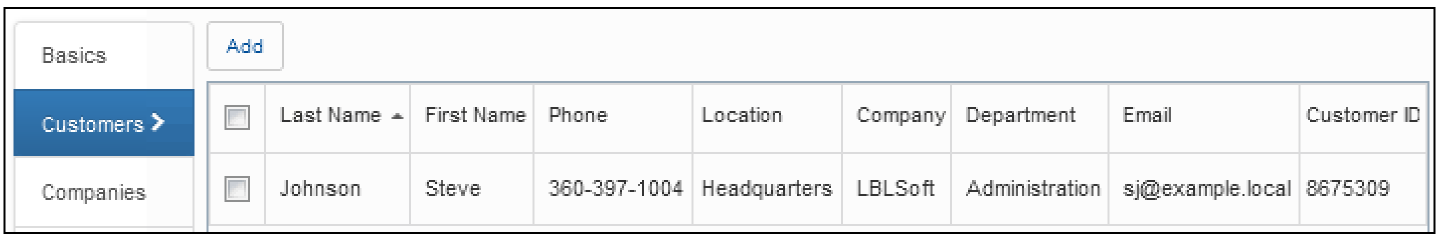
Adding Rules

Use the Add link on the On Save and Time-Based tabs to add previously configured rules to the rule group. All rules in the rule group associated with a change are evaluated when a change is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.



Assigning a Rule Group

Use the Add link on the Customers, Companies, Categories, Templates, and Hierarchy Templates tabs to associate the rule group with one or more customers, companies, categories, templates, and hierarchy templates. You can also do this via the Customer Profile, Company, Category, Change Template, and Hierarchy Template screens.



Printing the Rule Group Summary

Click the Print button to display a summary of your saved entries; you can click the Print link in the dialog to send the information to the printer.

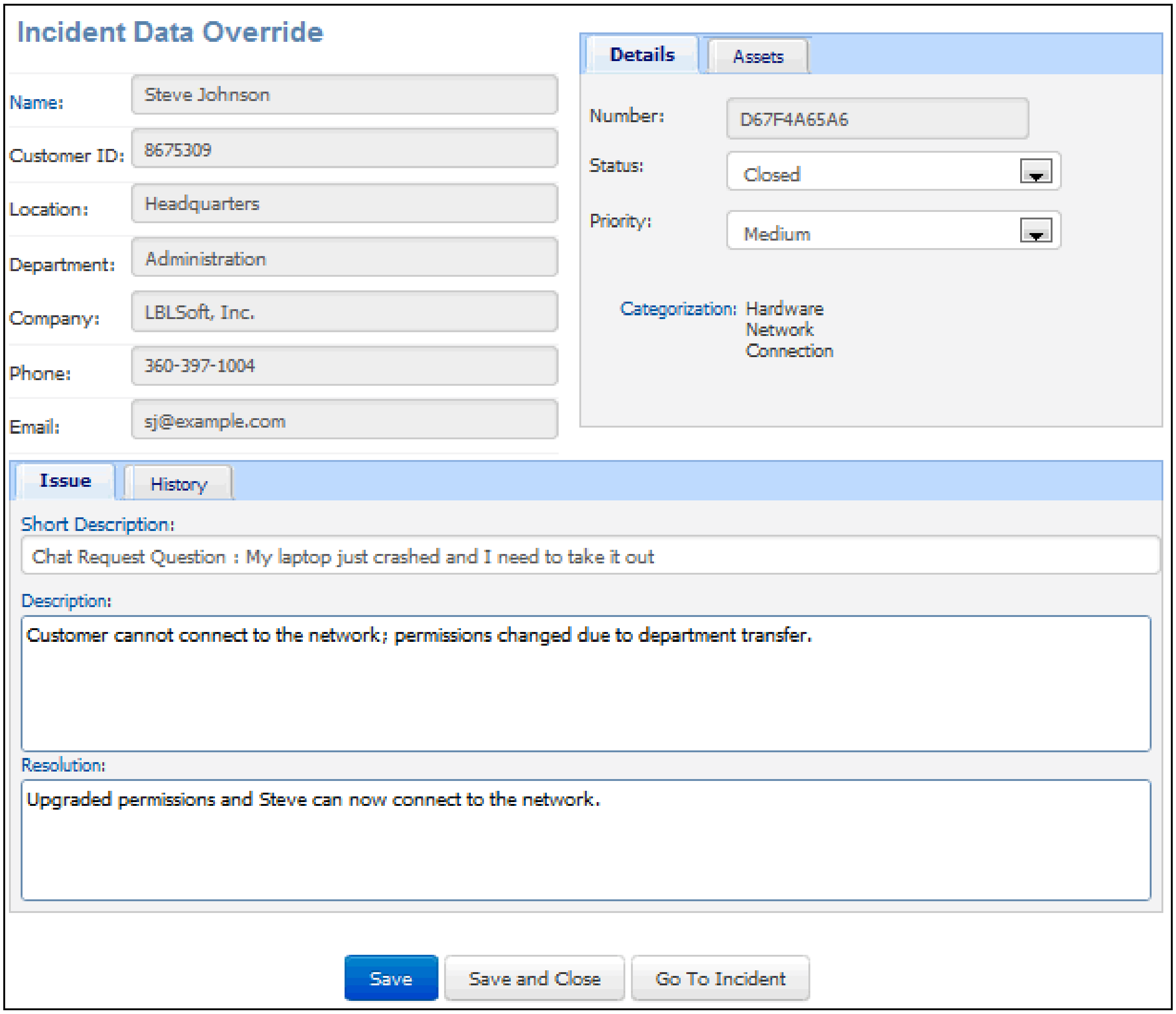
Rule Group Name:	Printer Maintenance
Target Entity:	Change
Default:	No
Hours of Operation:	24/7
Customers:	
Companies:	
Categories:	Hardware - Printer - Error
Templates:	
Hierarchy Templates:	
On Save Rules:	
Time-Based Rules:	
Rule Name:	Suspended Change Notification
Target Entity:	Change
Type:	Time-Based
Cumulative:	No
Conditions:	Match all of the following conditions: If Change Status is Suspended
Actions:	Repeat 1 time(s) every 16.00 hours Notification to be sent to Assignee - First Rep to Notify: Suspended Change Notification Repeat 1 time(s) every 4.00 hours Assignee will change to Barry White Rep Group will change to Administrators
Rule Groups:	Change - Default Rule Group Printer Maintenance
Rule Name:	Emergency Priority
Target Entity:	Change
Type:	Time-Based
Cumulative:	Yes
Conditions:	Match all of the following conditions: If Incident Status Type is Open and If Priority is Emergency
Actions:	Repeat 6 time(s) every 2.00 hours Notification to be sent to Assignee (via email): Emergency Priority Escalation SLA - Rep
Rule Groups:	Printer Maintenance

Print Close Window

Using the Data Override Feature for Incidents, Problems, and Changes

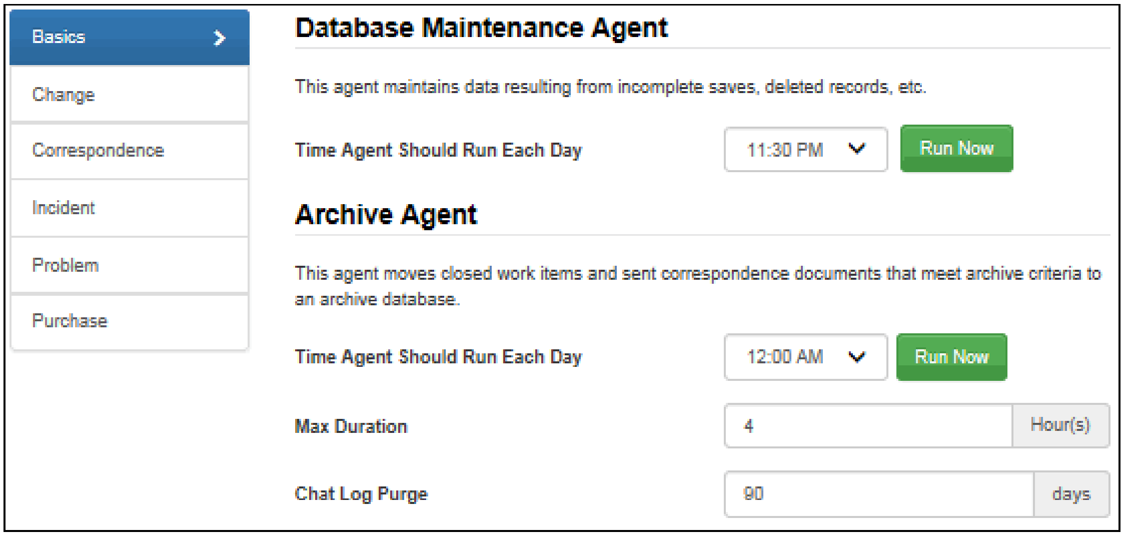
Use the Options and Tools | Administer | Data Override feature to overwrite fields on any saved incident, problem, or change. When a change is made using this feature, it will be logged in the Audit History field and notifications will be suppressed. If an approval cycle is in effect and the status is changed to Closed via data override, the cycle will be canceled and notifications will not be sent.

To access this feature, use the Override Data option on the applicable menu. It is available if the Allow Data Override field is enabled in your Rep Profile record.



Archiving and Database Maintenance

Use the Options and Tools | Administer | Archiving and Database Maintenance screen to schedule agents that maintain iSupport databases and move closed work items to archive databases.



Scheduling the Database Maintenance Agent

Schedule the Database Maintenance agent to maintain data resulting from incomplete saves, deleted records, etc. Select the time at which the Database Maintenance agent should run each day.

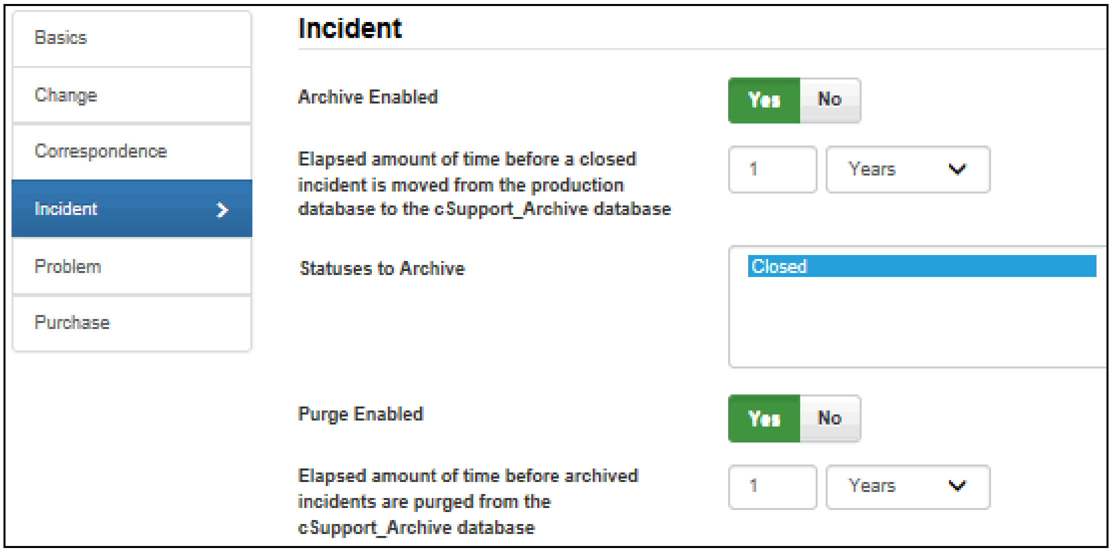
Archiving

iSupport's Archive feature moves items that are not marked for deletion, with a specified Closed status, to an archive database. In order for an item to be archived, a specified number of days must have elapsed past the close date. Archived items cannot be edited.

- Eligible incidents and sent correspondence not associated with an open work item will be moved to the cSupport_Archive database. If an incident or change is part of a hierarchy template, the topmost parent in the hierarchy must meet the archive criteria before any closed work items are archived.
- Eligible changes will be moved to the cSupport_Archive_Change database
- Eligible problems will be moved to the cSupport_Archive_Problem database
- Eligible purchase orders will be moved to the cSupport_Archive_Purchase database

You can also configure purging, which permanently deletes items from the applicable archive database after the specified number of days/years past the archive date.

For each work item type, use the following fields to specify the items eligible for archiving. When finished, use the **Time Agent Should Run Each Day** field to select the time the Archive Agent should run. You can click Run Now to run the agent immediately. In the Max Duration field, enter the amount of time (in hours) at which to terminate the archive agent if it is still running.



Archive Enabled - Select Yes to enable the Archive Agent to move eligible items from the production database to the applicable archive database. Items with one of the specified Closed statuses and a closed date that is past the specified number of days/years will be selected.

Elapsed amount of time before a closed <*work item type*> or sent correspondence (not associated with an open incident) is moved from the production database to the cSupport_<*work item type*>_Archive database - Enter the number of days to pass after the close date until an item with one of the specified Closed statuses is selected to be moved.

Statuses to Archive - Select one or more of the defined Closed statuses that will determine the items eligible for archiving.

Purge Enabled/Elapsed amount of time before archived <*work item type*> are purged from the <*applicable archive database*> - Select Yes to permanently delete items from the applicable archive database after the specified number of days/years past the archive date. In the **Elapsed amount of time before archived <*work item type*> are purged from the <*applicable archive database*>** field, enter the number of days/years past the archive date in which to remove items from the applicable archive database.

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