Configuring iSupport Knowledge Functionality

Overview

Basic Configuration

- Enable and set **basic Knowledge options** via the Core Settings | Feature Basics screen. See "Configuring Knowledge Basics" on page 3 for more information.
- Configure **roles/permissions** for support reps and rep groups using Knowledge functionality via the Core Settings | Support Representatives screen.See the online help for more information.
- Configure Knowledge functionality on **mySupport** via the Core Settings | mySupport | Portals screen. See the online help for more information.

Optional Customization

- Set up **categories**. Categories are required when entering knowledge entries; when knowledge entry searches are performed in the Incident, Problem, and Change (if enabled) screens, the search is based on the selected category combination. You can restrict display of knowledge entries by specifying the support representative and customer groups that can access a categorization. See the online help for more information.
- Create and customize Knowledge event **notifications** via the Custom Notifications screen. See the online help for more information.
- Use the Custom Fields screen to set up **custom fields** to include in the Knowledge Entry screen. See "Configuring Custom Fields" on page 6 for more information.
- iSupport includes a default Knowledge screen layout; you can **redesign** it to include fields and tabs that are specific to your company via the Knowledge Layout screen. See "Configuring Screen Layouts" on page 11 more information.

Optional Integration

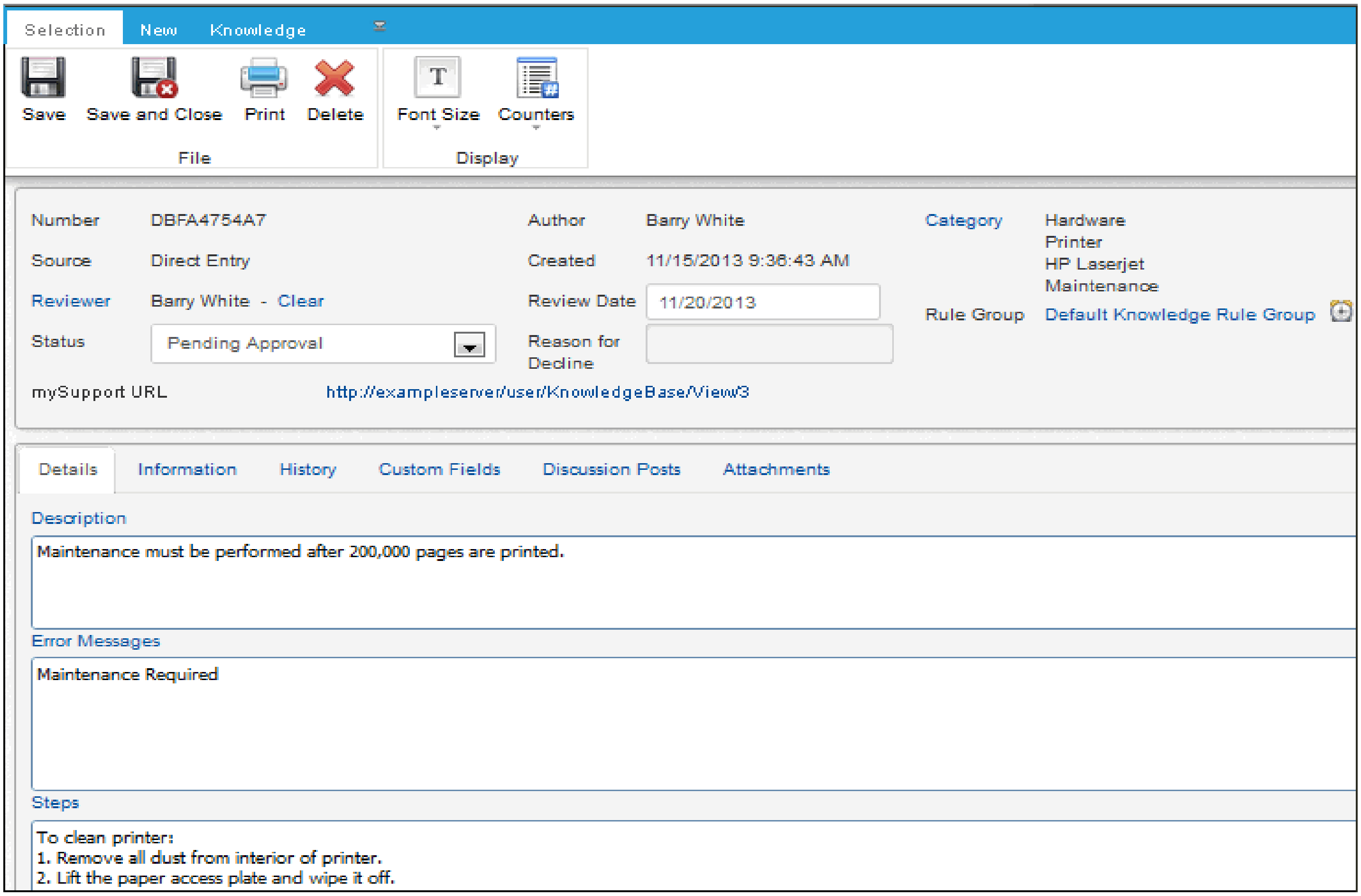
- Configure **webhooks** for posting Knowledge data to a web application. See "Configuring Webhooks" on page 28.

Optional Automation

- If using **approvals**, designate support representatives as approvers via the Rep Profile screen.
- Use the Knowledge Rules screen to create **rules** that will automatically change field values and send knowledge-related notifications. See "Configuring Rules and Rule Groups for Knowledge Entries" on page 16 for more information.
- Use the Incident Basics and Problem Basics screens to configure a prompt for **automatic creation of knowledge entries** when an incident or problem is closed. See the online help for more information.

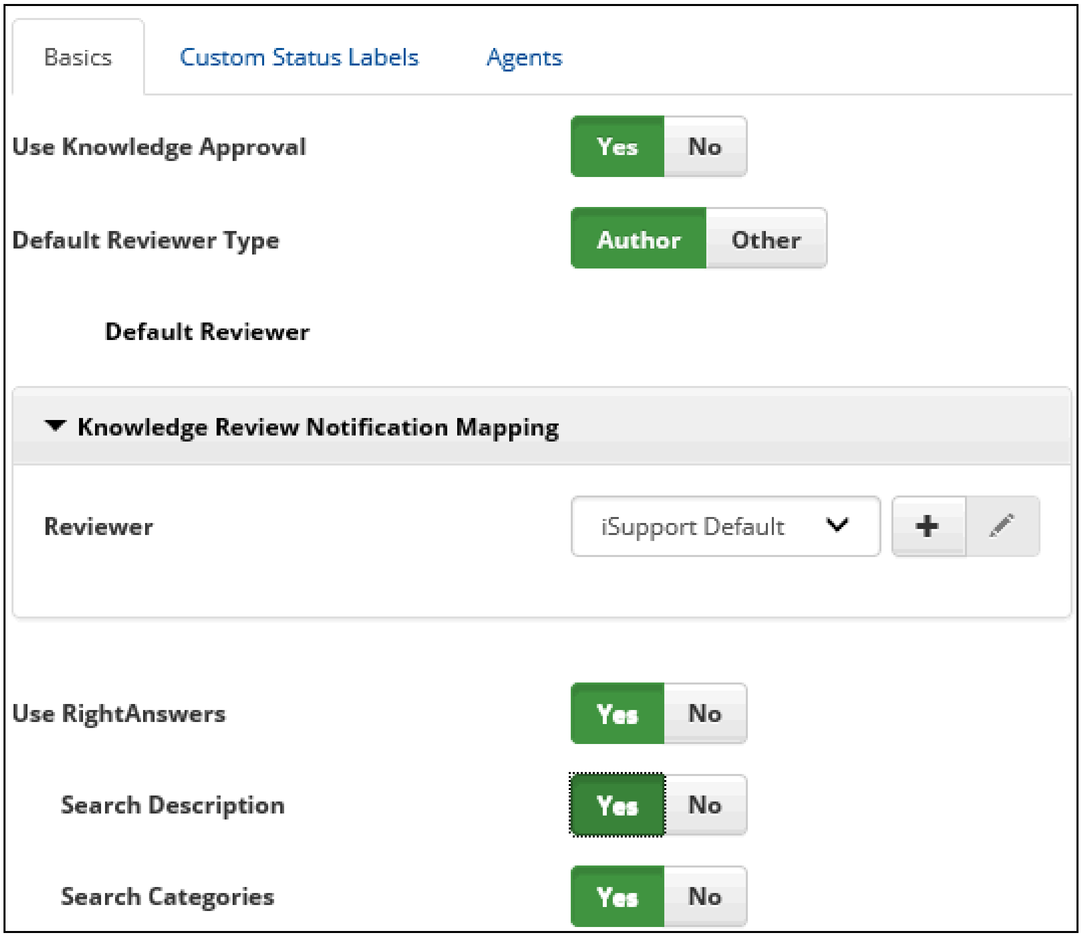
The Knowledge Entry Screen

Access the Knowledge Entry screen via the iSupport Desktop menu. Knowledge entries can be created automatically via the Incident or Problem (if enabled) screen; when an incident or problem is closed, a prompt displays regarding whether the entry should be added to the knowledge base. When the user selects Yes, the categorization, description, and resolution will be used to create a knowledge entry. If approvals are enabled, the entry is assigned a Pending Approval status. If approvals are not enabled, the entry is assigned an Approved External status.



Configuring Knowledge Basics

Use the Knowledge Basics screen to enable approval, RightAnswers, and custom status options.



Configuring Knowledge Approvals

Use Knowledge Approval - Select Yes to enable knowledge approval functionality. Knowledge entries can be designated with the following default statuses; custom labels can be configured for these status labels.

- **In Progress** saves the entry in a draft form.
- **Approved External** makes the knowledge entry available for viewing on the Desktop and mySupport portal, as well as the Incident, Problem, and Change (if enabled) screens.
- **Approved External - Requires Authentication** includes the knowledge entry on the mySupport portal only for authenticated users.
- **Approved Internal** makes the knowledge entry to be available for viewing on the Desktop and Incident, Problem, and Change screens.
- **Pending Approval** includes the entry in the Pending Approval folder in the Knowledge view on the Desktop.
- **Declined** includes the entry in the Declined folder in Knowledge views on the Desktop so that the submitter can view, edit, and resubmit it if necessary.

After a knowledge entry is approved, only those designated as an approver can update it. If approvals are disabled, you can select Approved External, Approved External - Requires Authentication, or Approved Internal, or In Progress in the Status field.

Support representatives are designated as knowledge approvers in the Rep Profile screen.

Default Reviewer Type- Select the type of reviewer to populate the Reviewer field in the Knowledge Entry screen by default: the author or a selected support representative. The reviewer will be sent a notification that will function like the current Followup feature; the Knowledge Entry Review agent will look for entries that match the review date specified in a knowledge entry and send a newsletter-style email to the reviewer. Like the Followup feature, if you use a custom notification it sends an individual email for each knowledge entry instead of the newsletter style.

Default Reviewer - If Other was selected in the Default Reviewer type field, select the support representative to populate the Reviewer field in the Knowledge Entry screen.

Recipient Notification Mappings - Select the notification to be sent to the reviewer or select Create New to access the Custom Notification screen. The Knowledge Entry Review agent (specified on the Agents tab) will search for entries that match the review date specified in a knowledge entry and send a notification to the reviewer. If the iSupport Default notification is used, a newsletter-style email will be sent; if a custom notification is used, a notification will be sent for each knowledge entry.

Configuring Right Answers

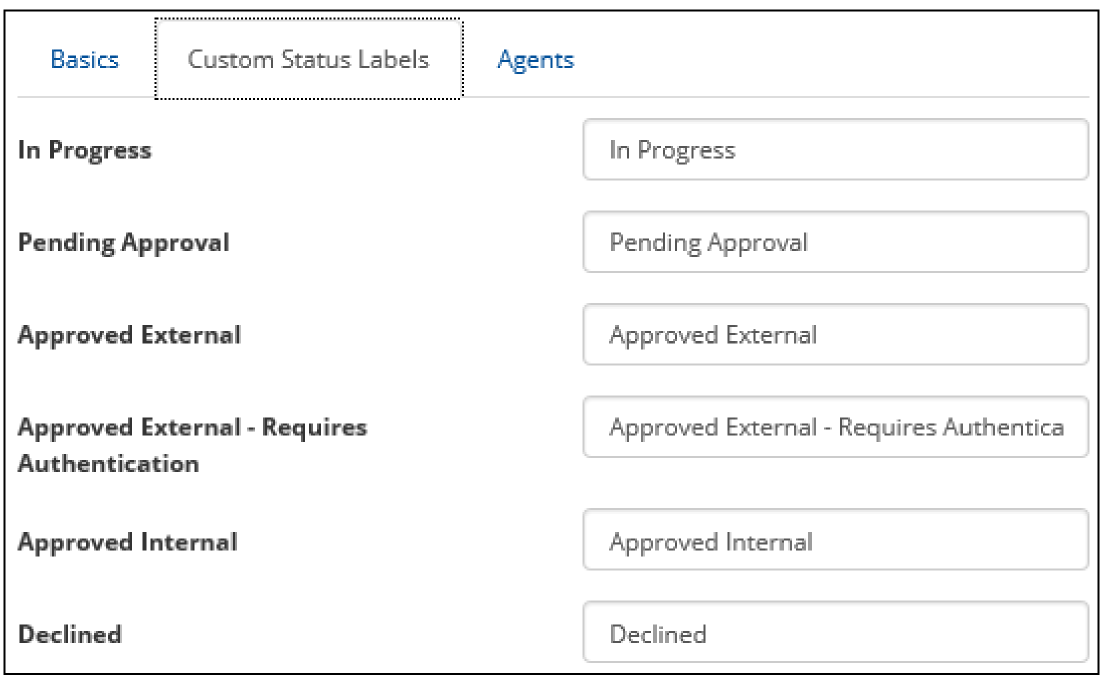
Use Right Answers - Select Yes to enable integration with RightAnswers, which enables support representatives to access subscription-based knowledge content for common PC hardware, software, and network issues. RightAnswers is a third party application integrated with but not included in iSupport. Contact iSupport Technical Support for assistance if you have purchased RightAnswers.

Search Options - Select one or both of the following:

- Use Description to include the incident's description in the search query when a support representative uses the RightAnswers feature in the Incident screen.
- Use Categories to include the incident's category set in the search query when a support representative uses the RightAnswers feature in the Incident screen.

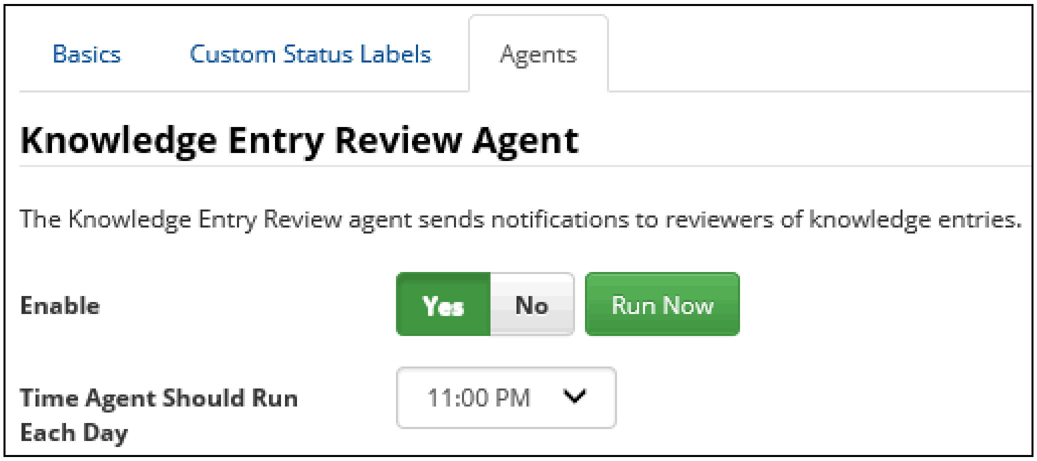
Configuring Custom Status Labels for Knowledge Entry Statuses

Enter custom status labels for the knowledge statuses of In Progress, Pending Approval, Approved External, Approved External – Requires Authentication, Approved Internal, and Declined.



Scheduling the Knowledge Entry Review Agent

Select Yes to enable the Knowledge Entry Review agent to search for entries that match the date review date specified in a knowledge entry and send a notification to the reviewer. If the iSupport Default notification is used, a newsletter-style email will be sent; if a custom notification is used, a notification will be sent for each knowledge entry. After selecting Yes, use the Time Agent Should Run Each Day field to select the time the agent should run.

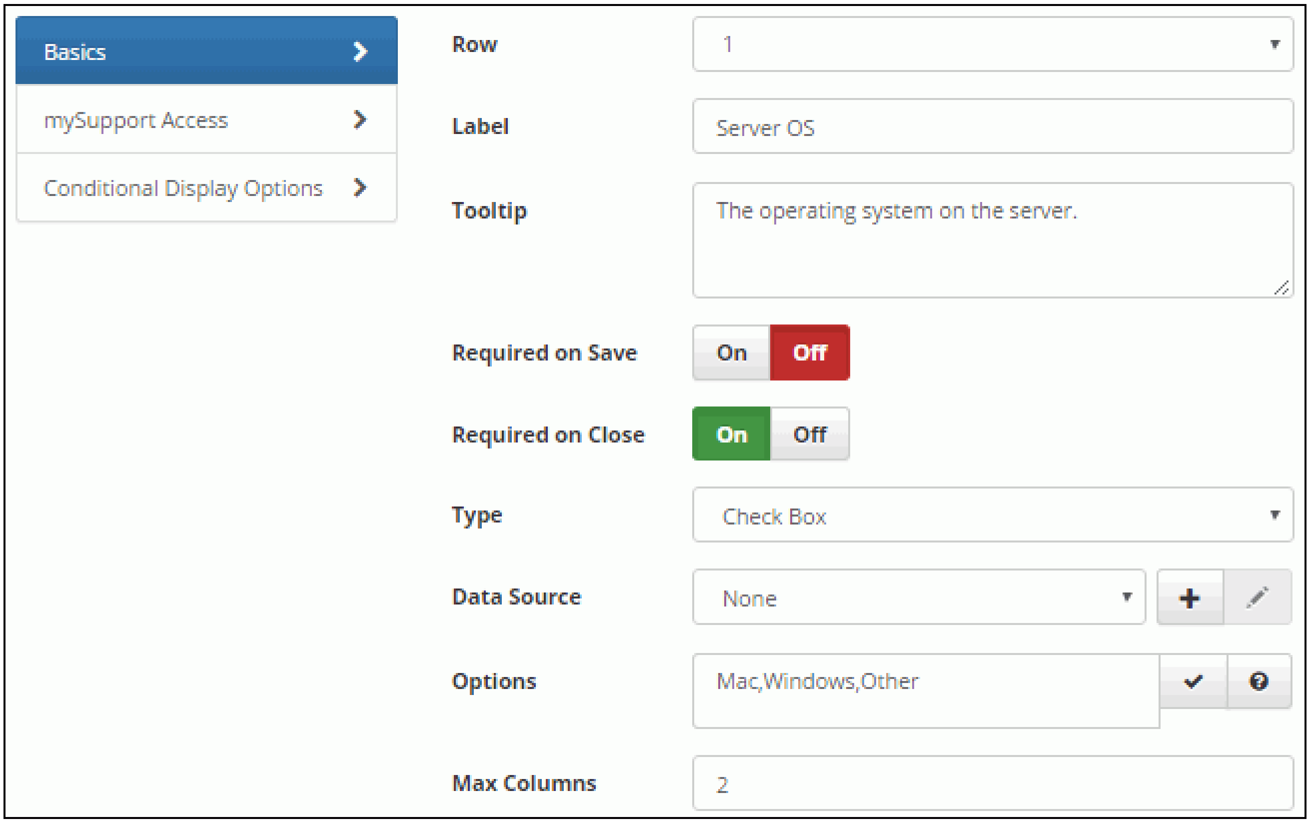


Configuring Custom Fields

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.

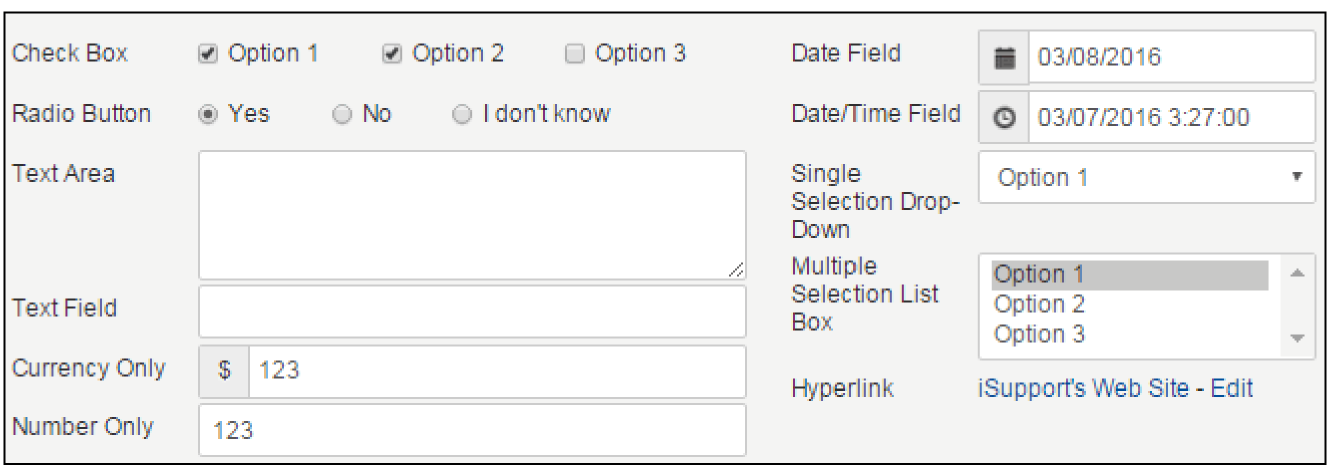
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see "Pulling From a Data Source" on page 9 for more 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 9 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)

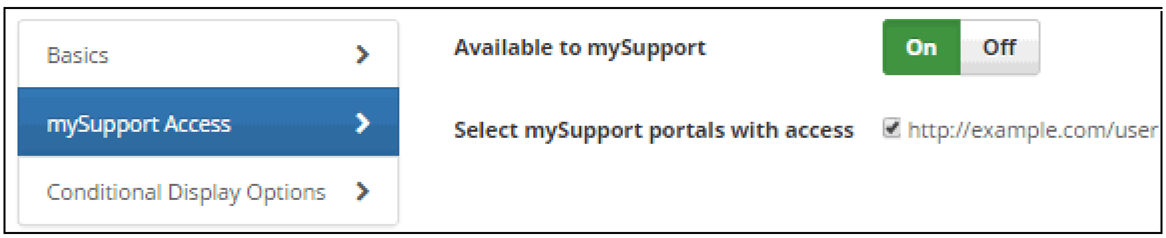
Max Columns/Max Rows - For Check Box and Radio Button type fields, enter the maximum number of columns to display (the fields will wrap to multiple rows); for a Multiple Selection List Box type field, enter the maximum number of rows to display (causing a scroll bar to appear).

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

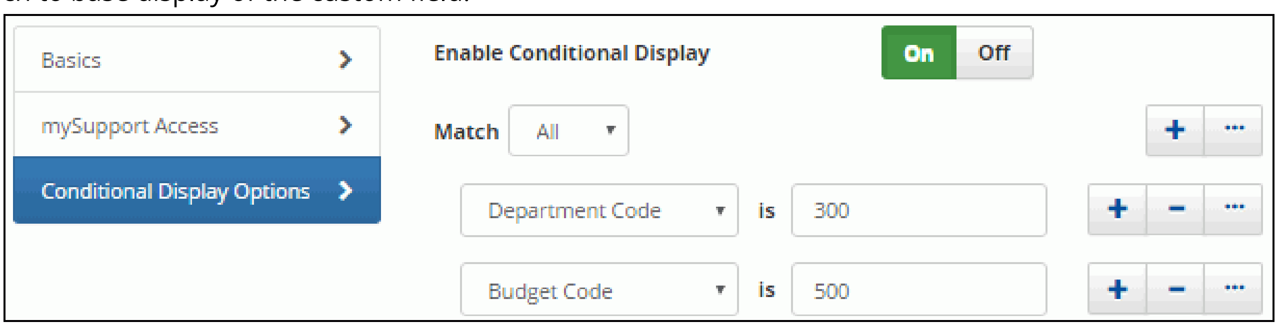
Available to mySupport - Select On to enable the field to appear on a mySupport portal.

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.

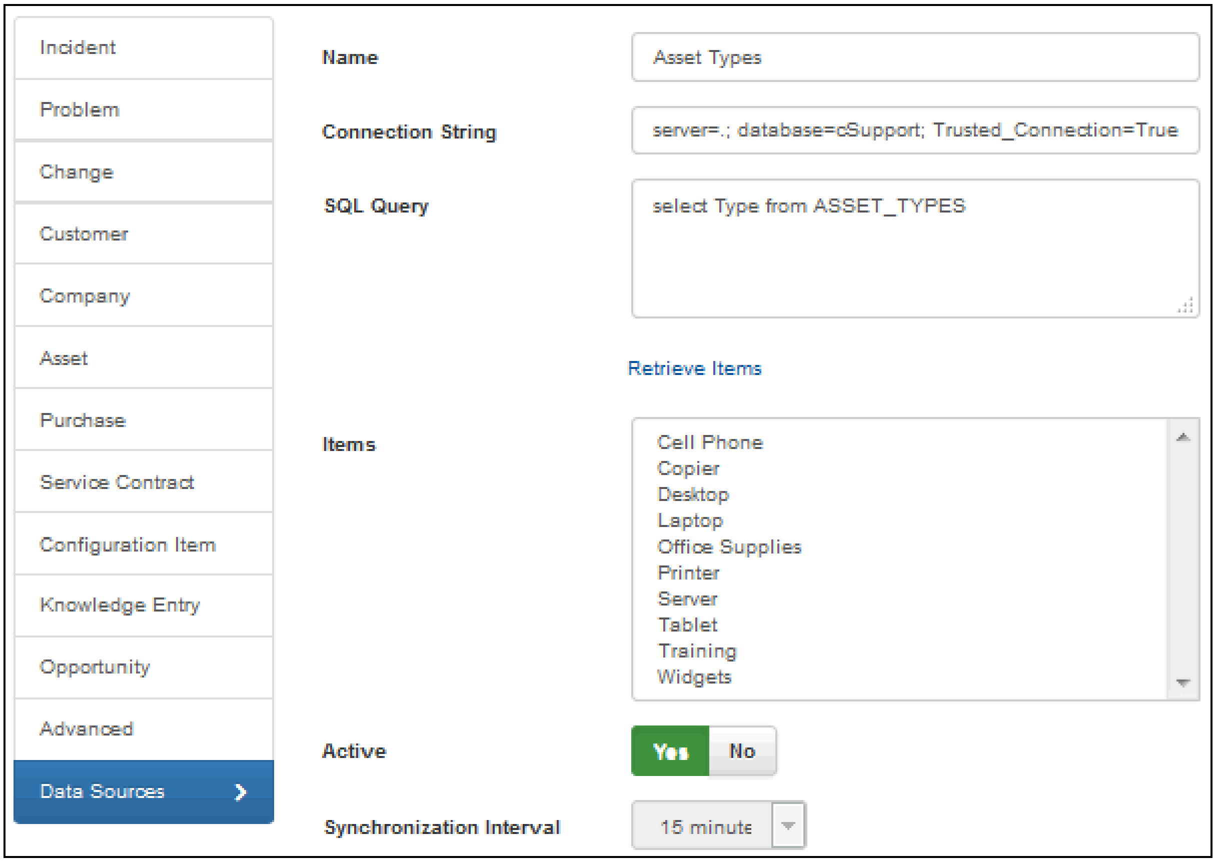


Use the Match *<All/Any>* field to specify whether you want **every** *<field>* is *<value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition + and Remove Condition − icons to display and remove a *<field>* is *<value>* search condition. Click the Add Condition + 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.

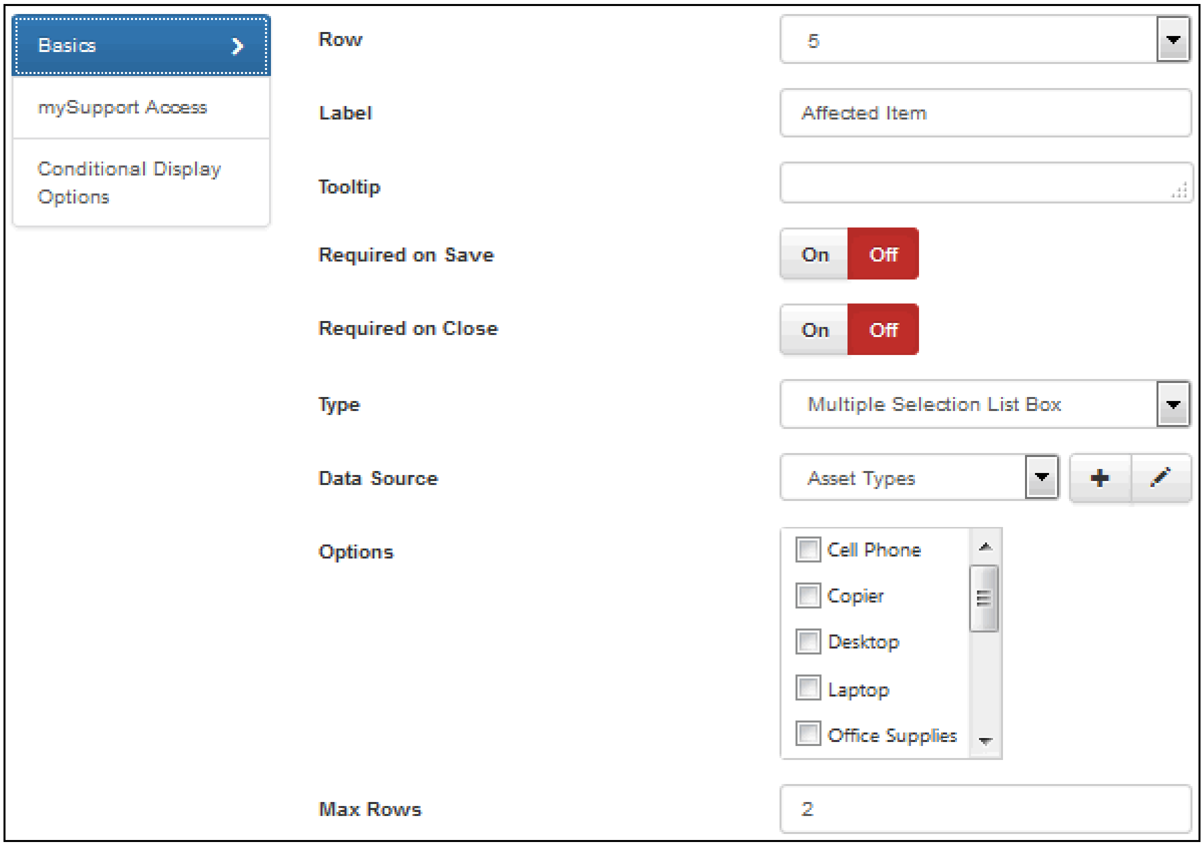
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Click the Retrieve Items button to populate the Items field using this string.

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

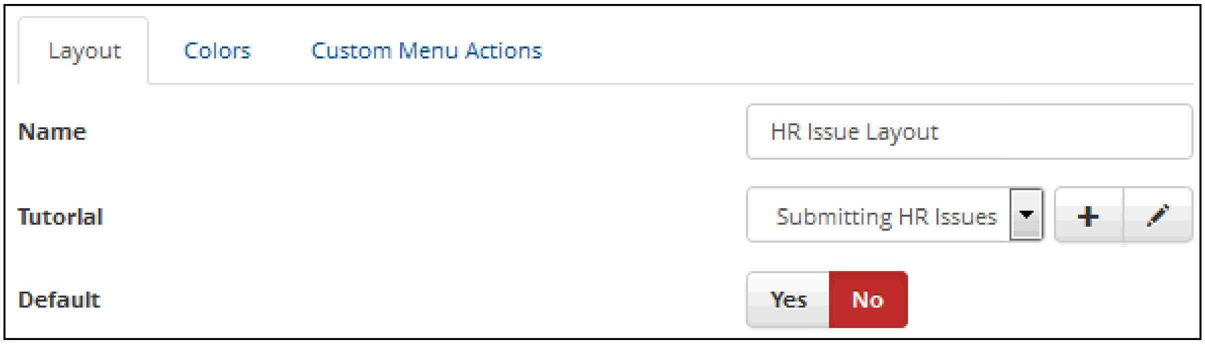
After saving, the custom field data source definition will be available for selection in the Custom Field Definition dialog. The Options field will be populated and will not be editable after synchronization.



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.

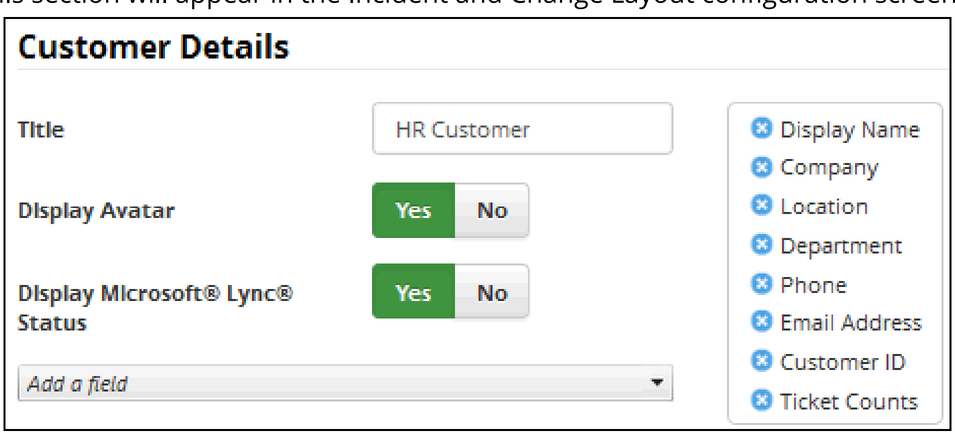
For Rep Client layouts, you can use the Preview button at the bottom of the Layout screen after adding required fields to the form to display your layout. You'll need to select a record to use for displaying field data.

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.

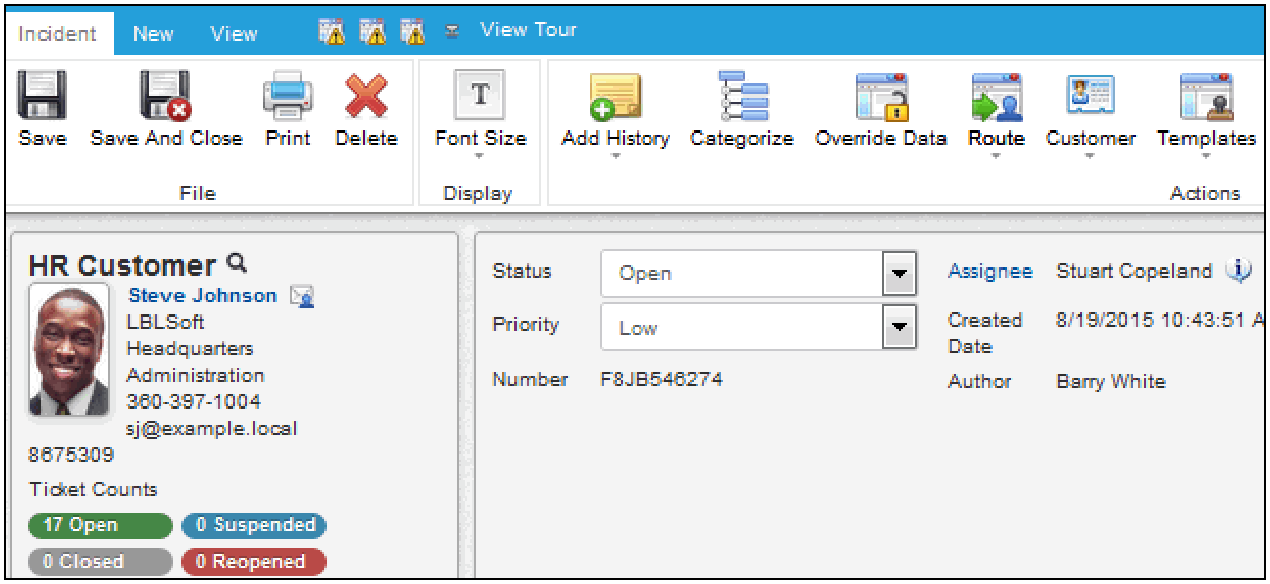
Configuring Customer Details

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.

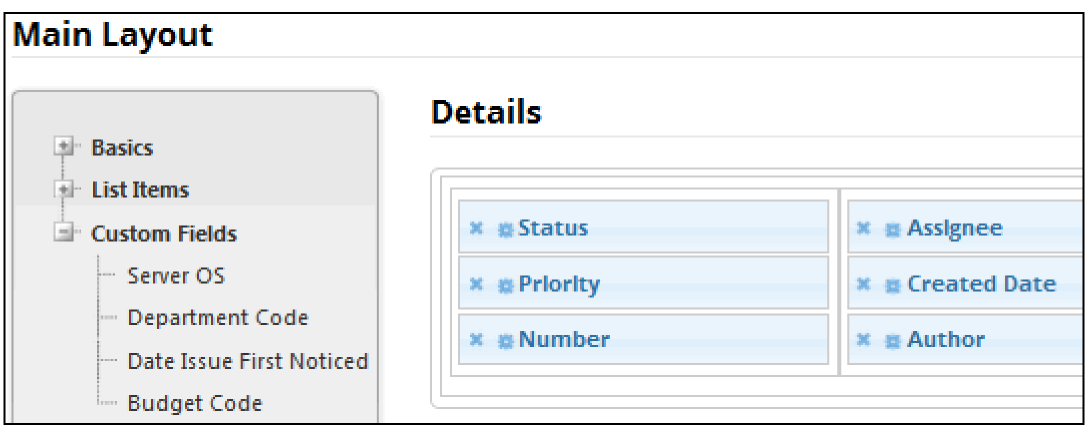
To include the customer's avatar (uploaded via the Customer Profile screen or the mySupport portal), select Yes in the **Display Avatar** field. Use the Add a Field dropdown to select the fields to appear in the upper left Customer area at the top of the Incident screen. Note that the **Ticket Counts** 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.

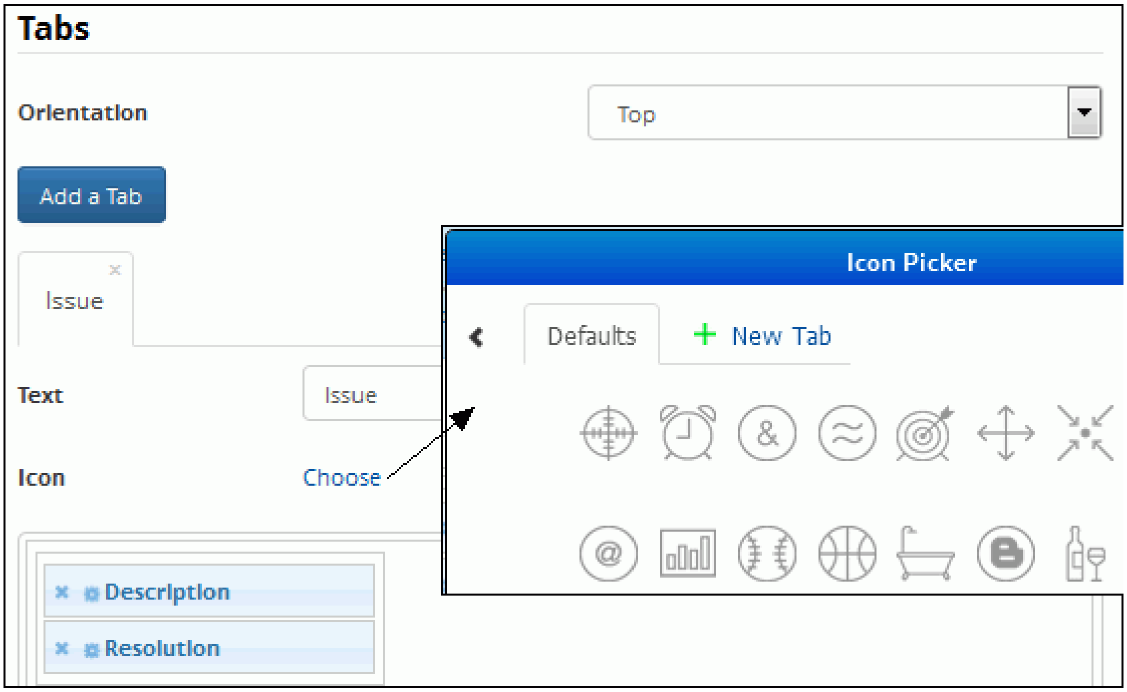
Adding Fields and Tabs

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.

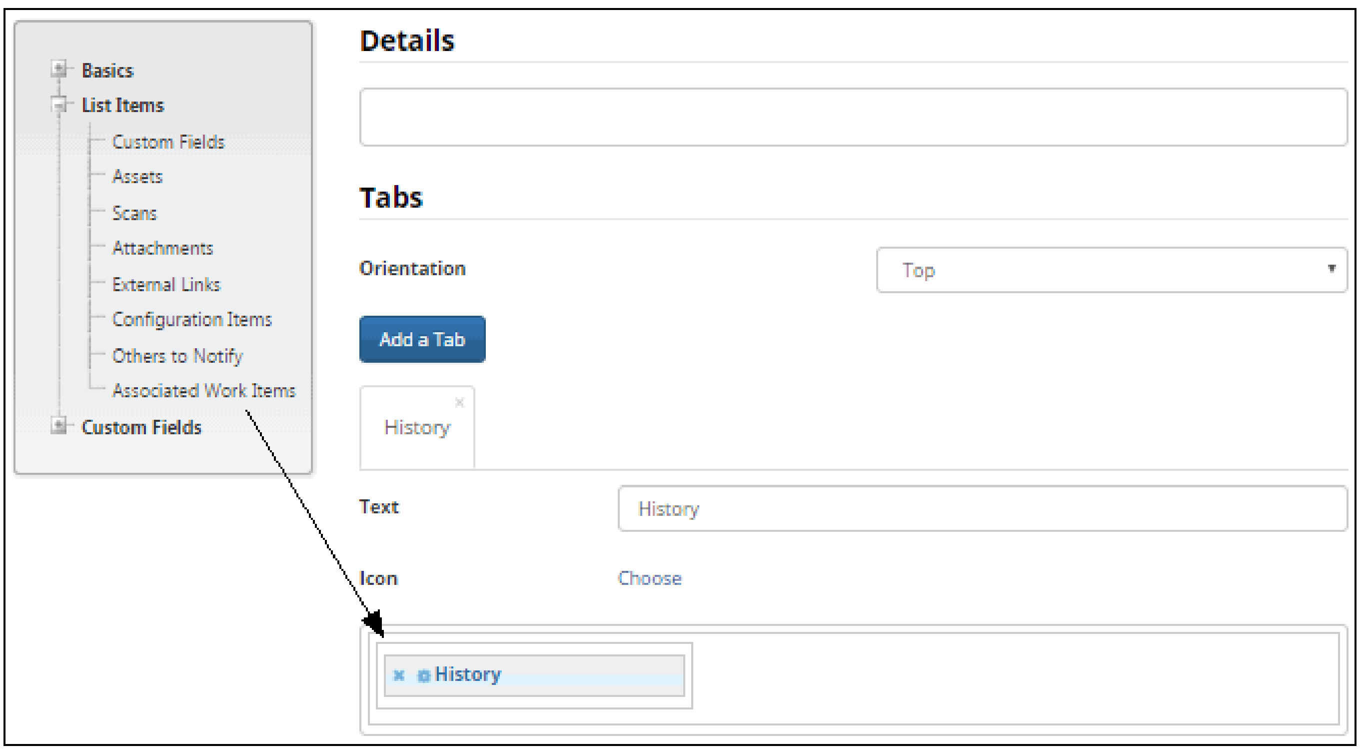


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

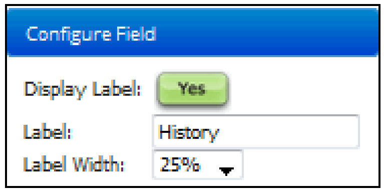


To add fields to the tab, drag fields from the selector on the left side of the Layout screen to the middle of the section below the Icon field.

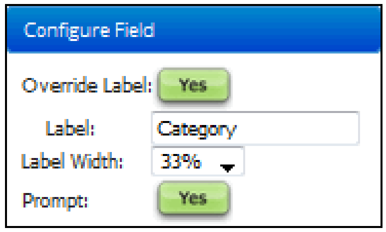


Configuring Fields

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.



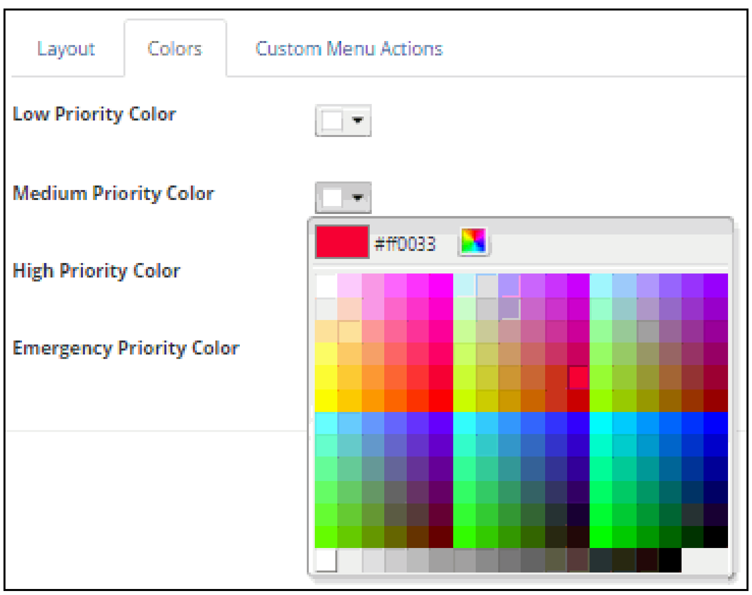
An **Override Label** field will be included for mySupport layouts; select Yes to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



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.

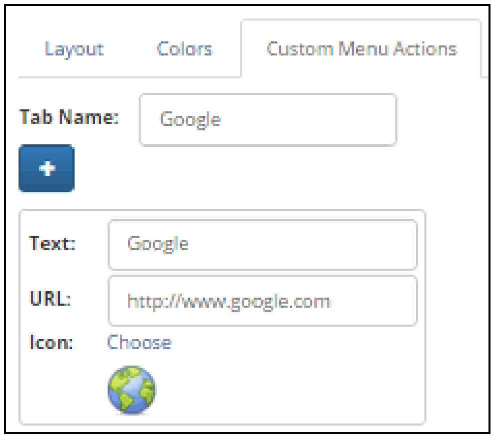
Configuring Priority-Based Background Colors

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 Rules and Rule Groups for Knowledge Entries

Use the Knowledge Rules screen to create **rules** that will automatically perform actions when specified conditions are met. In order for a rule to be evaluated, it must be included in a rule group; rule groups are applied to knowledge entries through category combinations. (A default rule group will apply if none are applicable.) When a knowledge entry 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. This functionality can be used to:

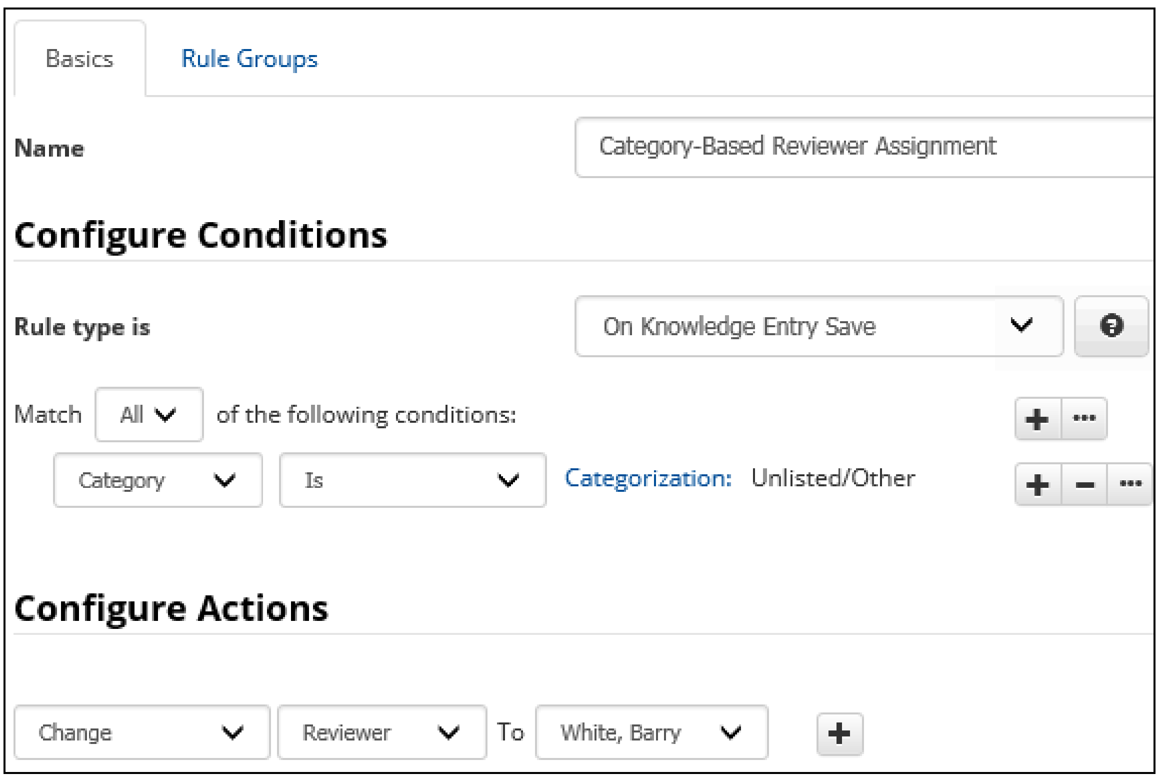
- Change values in the Category, Review Date, Reviewer, and Status fields, as well as in any custom fields
- Send notifications via email or desktop notification
- Execute a webhook for posting Knowledge data to a web application

A default knowledge rule group will be included in iSupport on installation or upgrade.

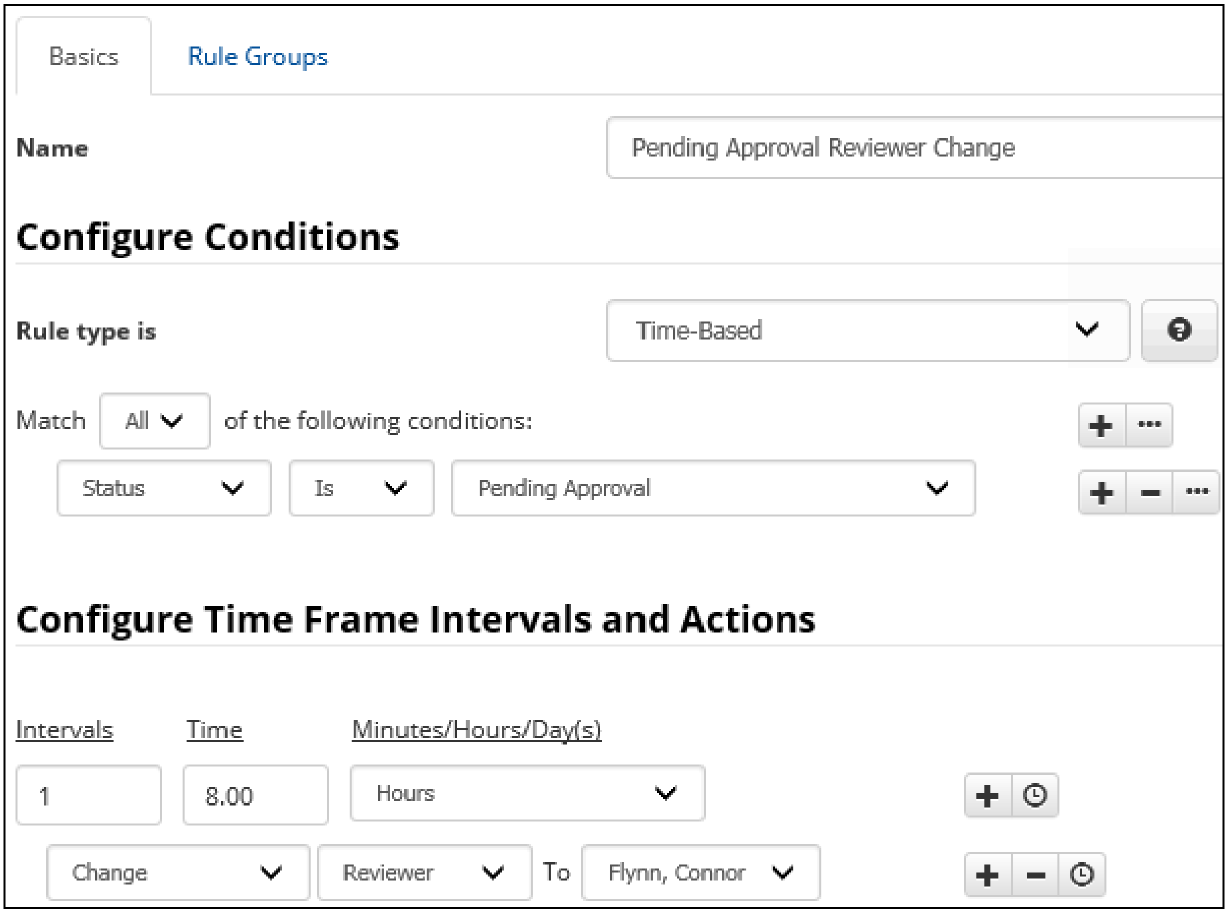
Rule groups are applied to knowledge entries through category combinations; when a knowledge entry is saved, the matching rule group is first determined. (If no rule group is associated with the category combination, the default rule group will be applied.) Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed. You can use the Knowledge Rule Groups screen to create new rule groups and assign them to category combinations. (You can also assign rule groups via the Category entry screen.) See "Creating Rule Groups" on page 26 for more information.

Rule Types

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



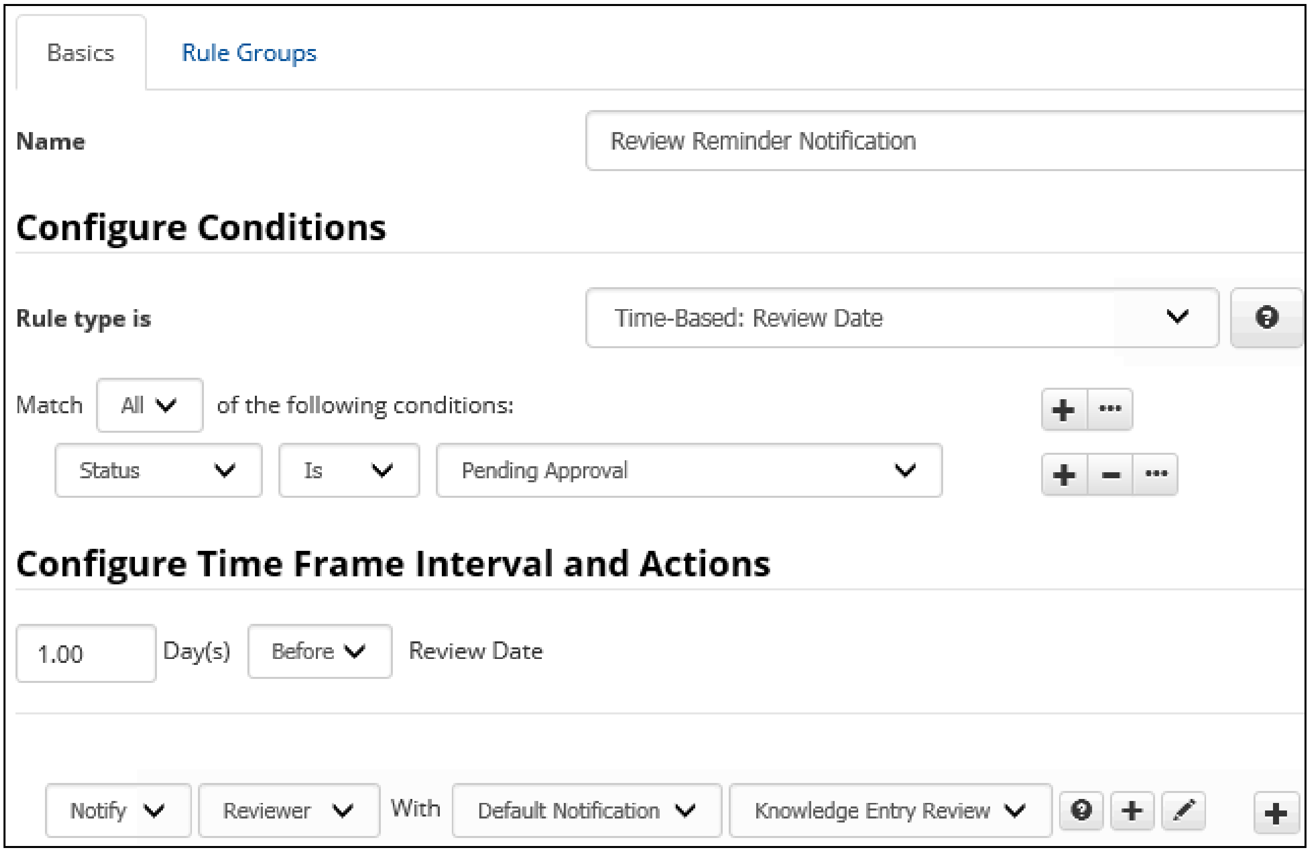
Time-Based and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon save of a knowledge entry, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.



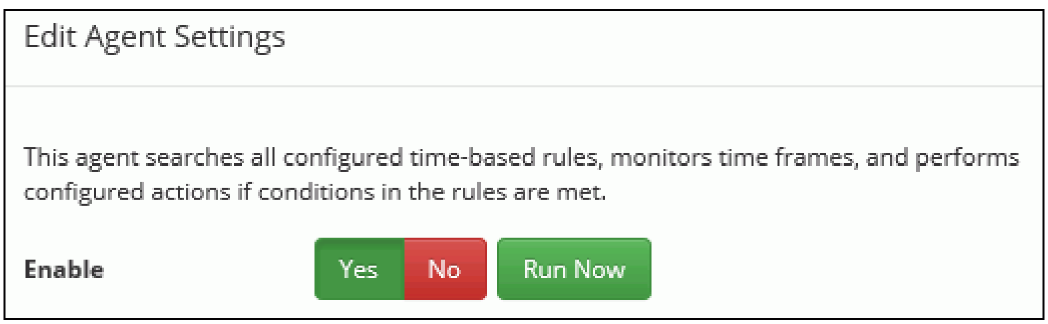
If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **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: Review Date rules will perform the specified action(s) when the defined number of days before or after the review date occurs.



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



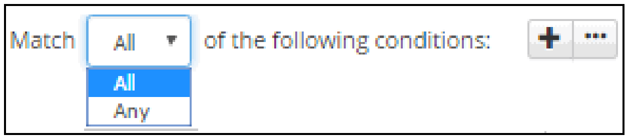
Note: If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

Creating Rules

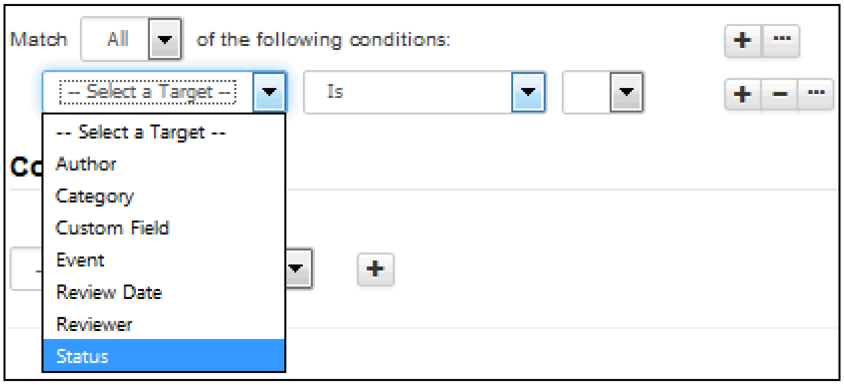
Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections "Configuring Conditions" on page 19 and "Configuring Actions" on page 20 for more information. See "Creating Time Frame Intervals for Time-Based Rules" on page 22 for information on configuring interval time frames and actions to perform with each set of intervals.

Configuring Conditions

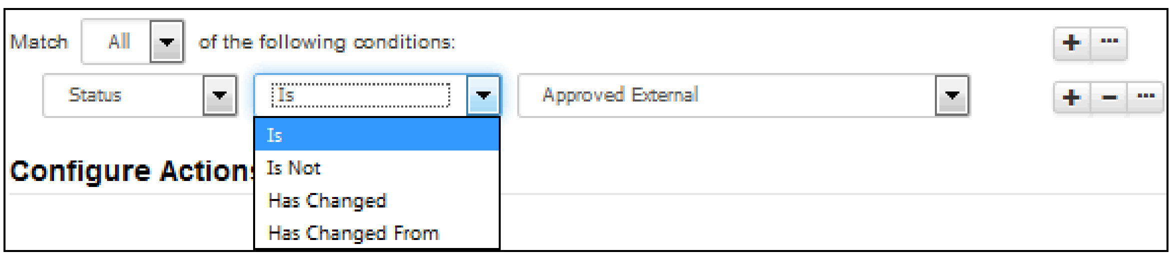
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



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 knowledge entry save. In the Select a Target dropdown, select what to evaluate: an entry field or event.



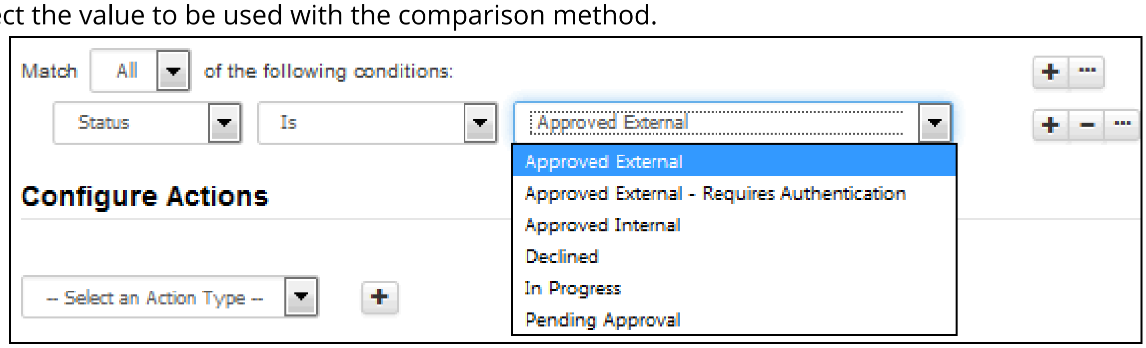
In the next dropdown, select the comparison method.



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.

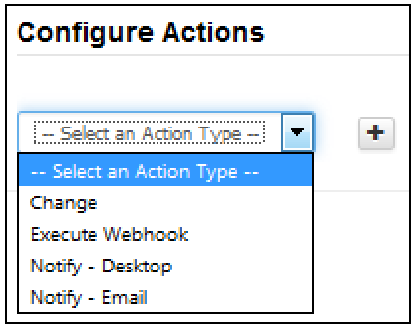
Finally, select the value to be used with the comparison method.



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.

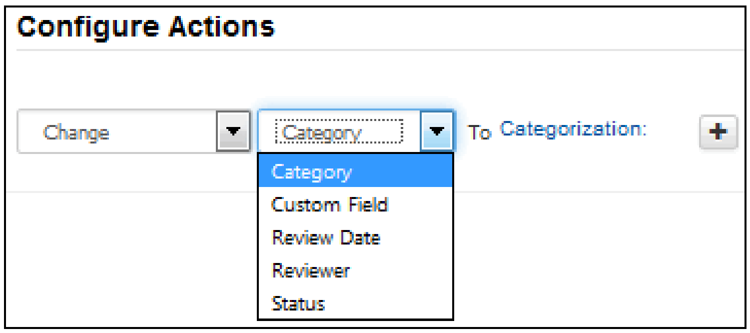
Configuring Actions

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.



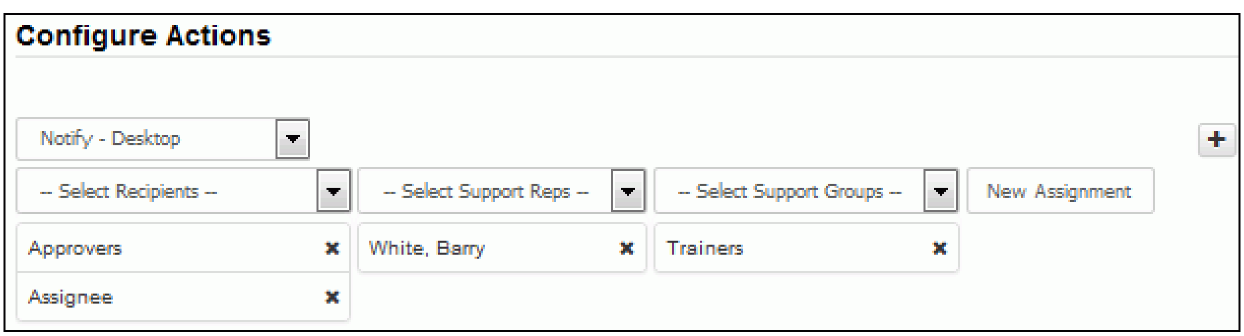
You can configure the following actions:

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



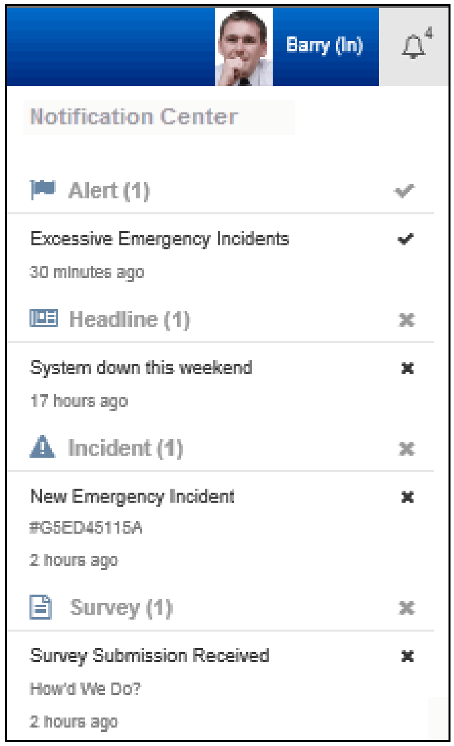
- **Execute a configured webhook** for posting Knowledge data to a web application. See “Configuring Webhooks” on page 28 for more information.

- **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.

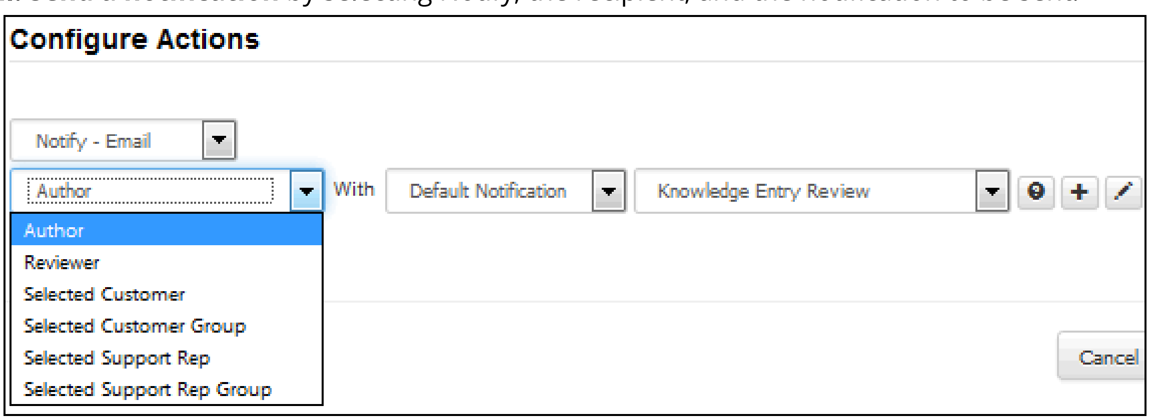


Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:

An example of the dropdown is shown below.

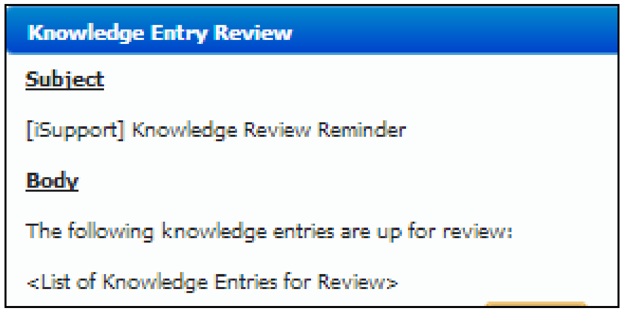


- **Email: Send a notification** by selecting Notify, the recipient, and the notification to be sent.



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.

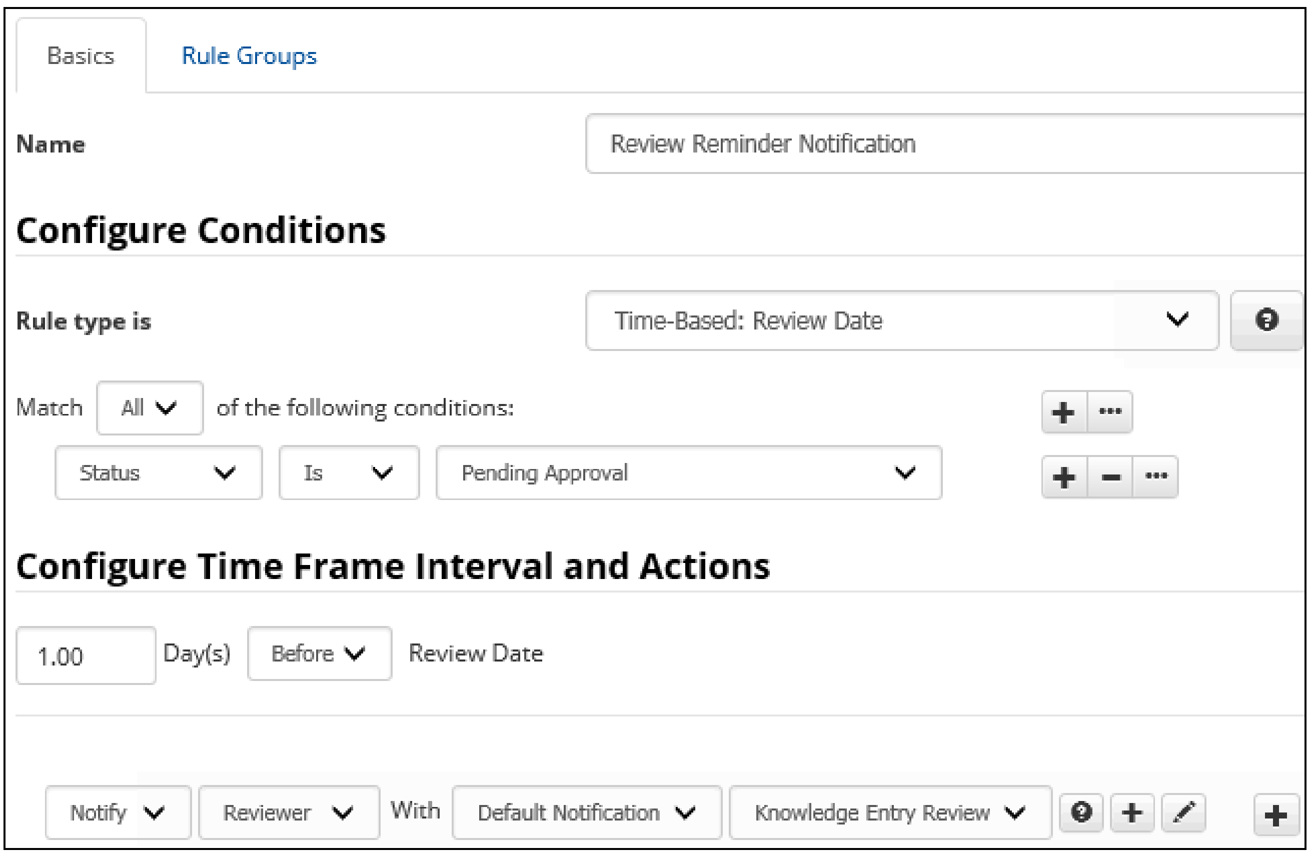
Click the Show Notification icon to display the contents of the selected notification.



Creating Time Frame Intervals for Time-Based Rules

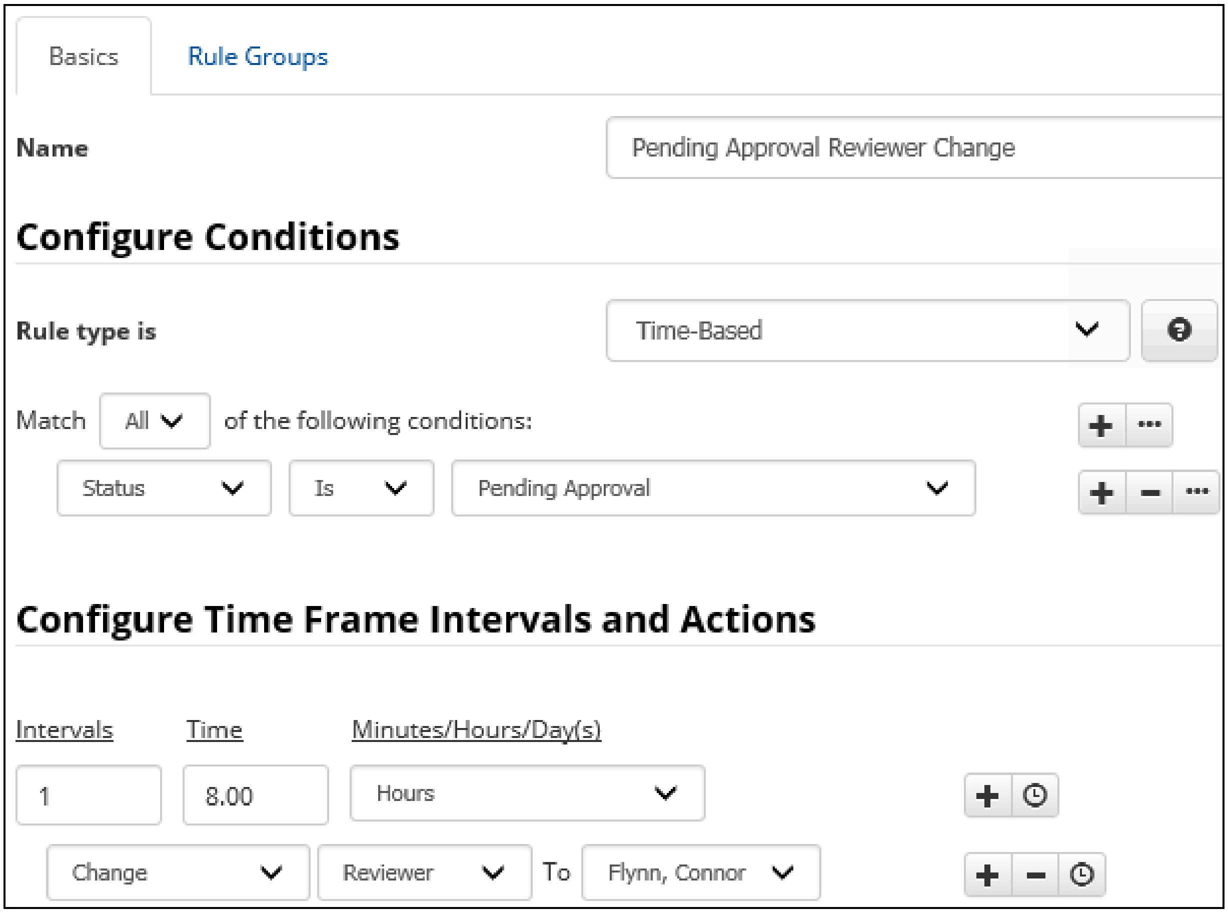
Time-Based: Review Date Rules

A Time-Based: Review Date 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 knowledge entry's review date occurs.



Time-Based and Time-Based: Cumulative Rules

With Time-Based and Time-Based: Cumulative rules, the Time Frame Intervals and Actions 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.



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 the time frame. 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 knowledge entry will be monitored for eight hours after initial save; if the status remains at Pending Approval for the entire eight hours, the reviewer will change to Connor Flynn.

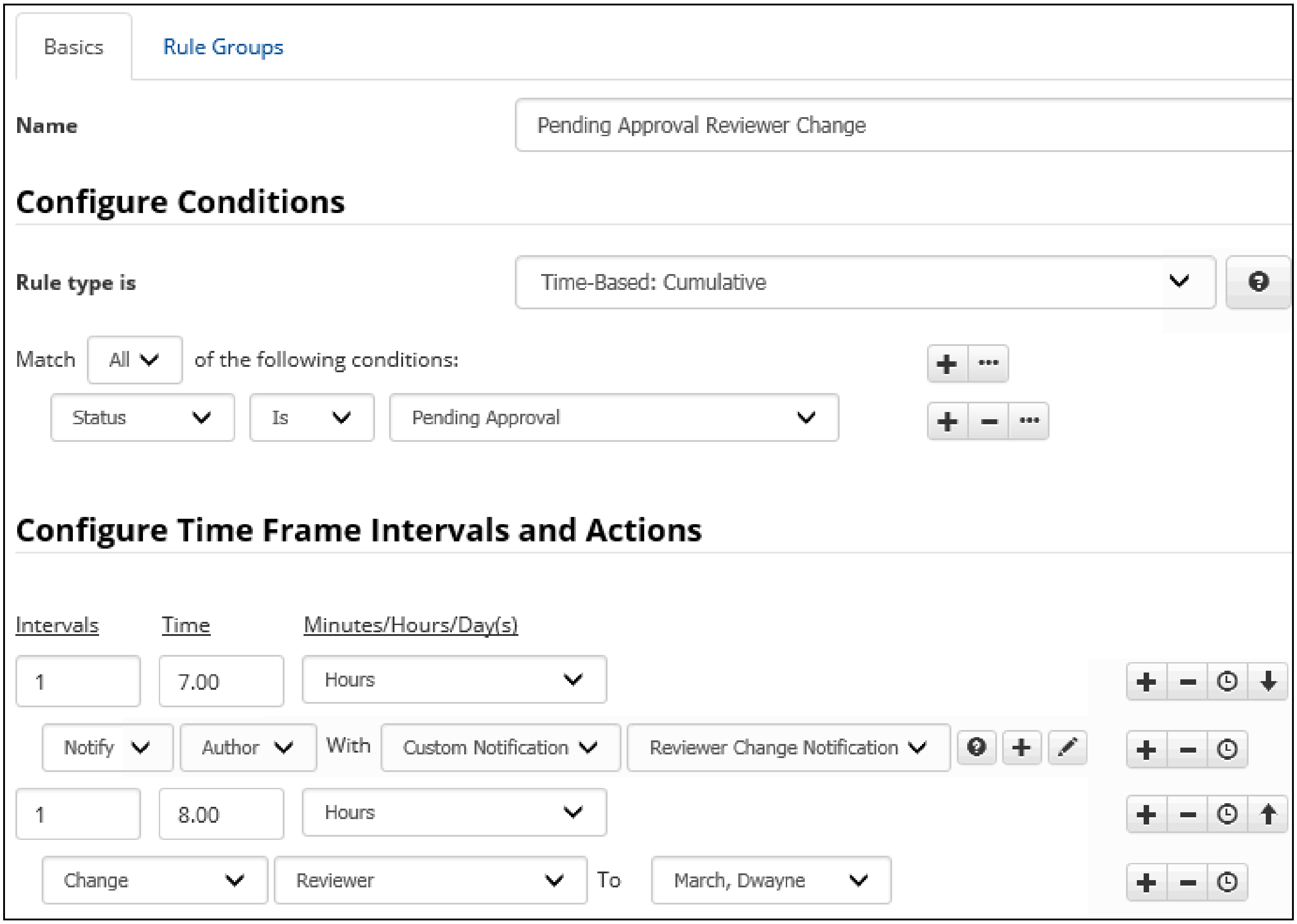
The difference between these types of rules is that, if conditions change prior to the configured interval settings, **Time-Based** rules will clear all pending actions and the time frame will restart if conditions are met again; **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

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

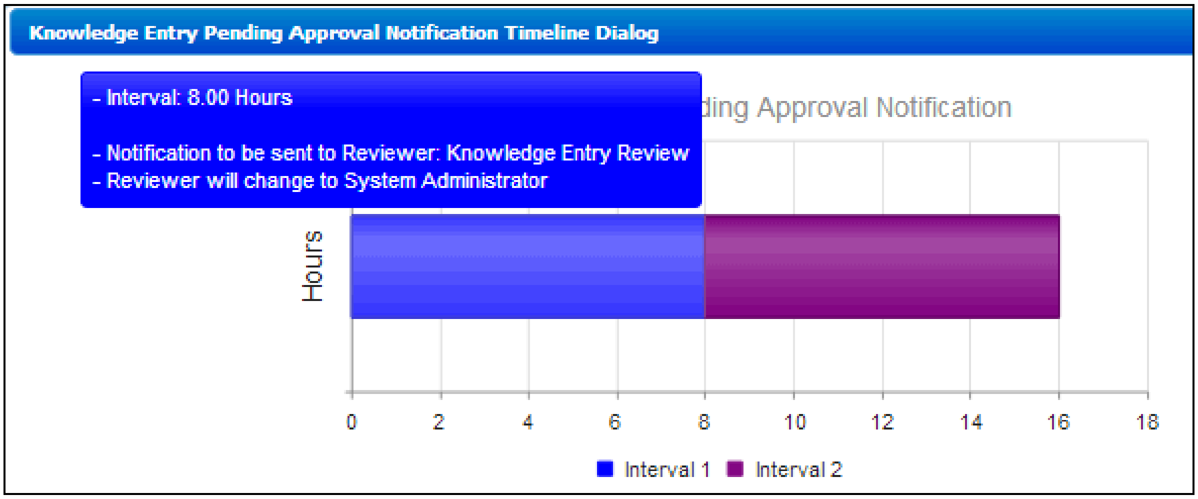
You can use the Add Interval icon to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up icons will appear for changing the order in which the interval time frames will be evaluated.

In the example below, the knowledge entry will be monitored for a seven hour time frame and if the status remains at Pending Approval for the entire seven hours, the Reviewer Change Notification will be sent to the knowledge entry author. The knowledge entry will then be monitored for an additional eight hour time frame and if the status remains at Pending Approval for the entire eight hours, the reviewer will change to Stuart Copeland.



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.

Rule Name:	Knowledge Entry Pending Approval Notification
Target Entity:	Knowledge Entry
Type:	Time-Based
Cumulative:	No
Conditions:	Match all of the following conditions: If Approval Status is Pending Approval
Actions:	Repeat 1 time(s) every 8.00 hours Notification to be sent to Reviewer: Knowledge Entry Review
Rule Groups:	Knowledge Approval Rules

Print Close Window

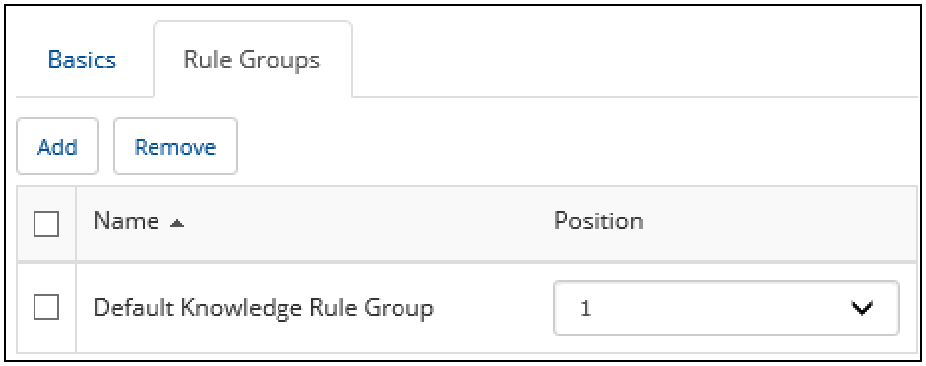
Associating Rules With Rule Groups

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.

Basics | Rule Groups

☐	Name ▲
☐	Approval Rule Group
☑	Default Knowledge Rule Group

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

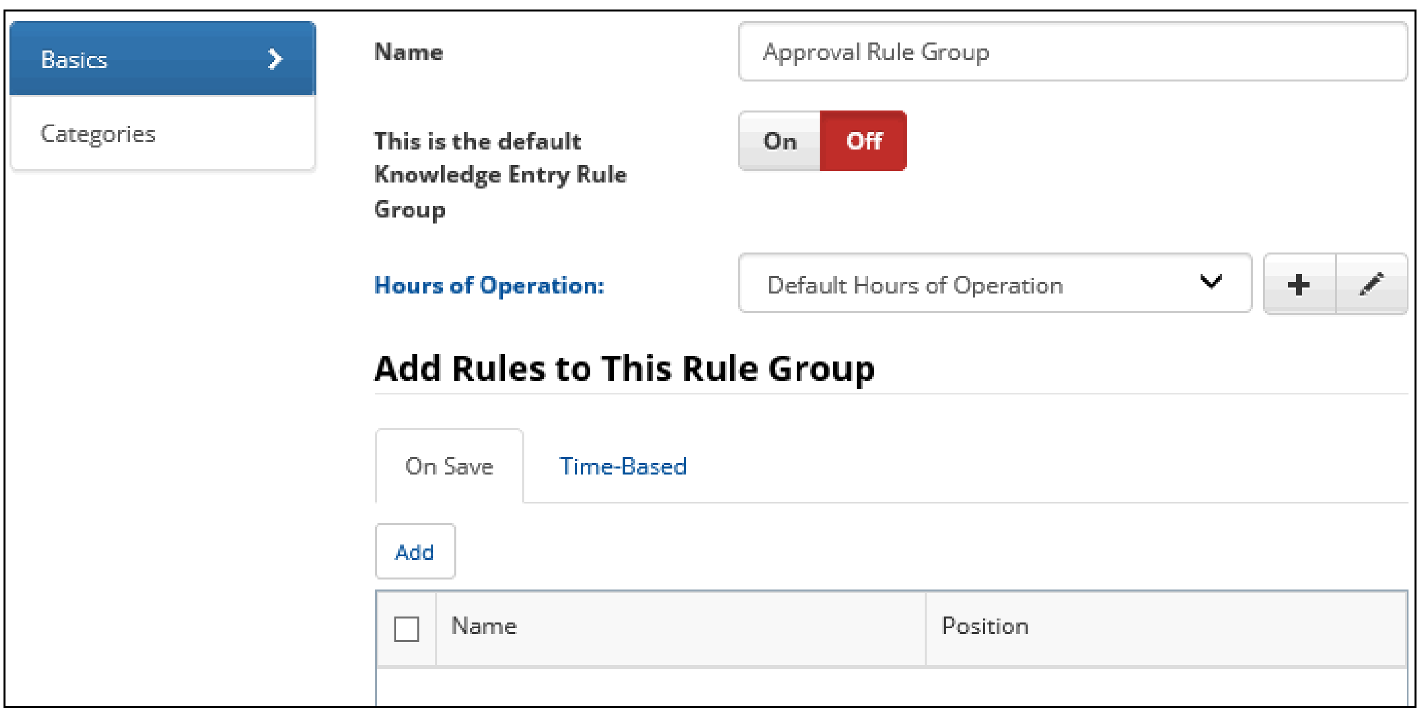


All rules in the rule group associated with a knowledge entry are evaluated when a knowledge entry is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

Click the Create link in the Knowledge Rule Groups screen to create a rule group that can be designated as the default Knowledge Entry rule group or associated with categories.

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 Knowledge Entry screen when the rule group is in effect for a knowledge entry.

This is the Default Knowledge Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the category combination associated with a knowledge entry. One rule group must be designated as default for knowledge entries.

Hours of Operation - Select or create the Hours of Operation definition with the time frame to be used to determine the time intervals set in time-based rules. You can click the Hours of Operation link to display details on the selected definition. Note that an assigned Hours of Operation only applies to On Knowledge Entry Save rules if Within Business Hours is used in a condition.

Adding Rules to a Rule Group

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 knowledge entry are evaluated when a knowledge entry is saved; the Position field determines the order in which actions are taken when conditions are met.

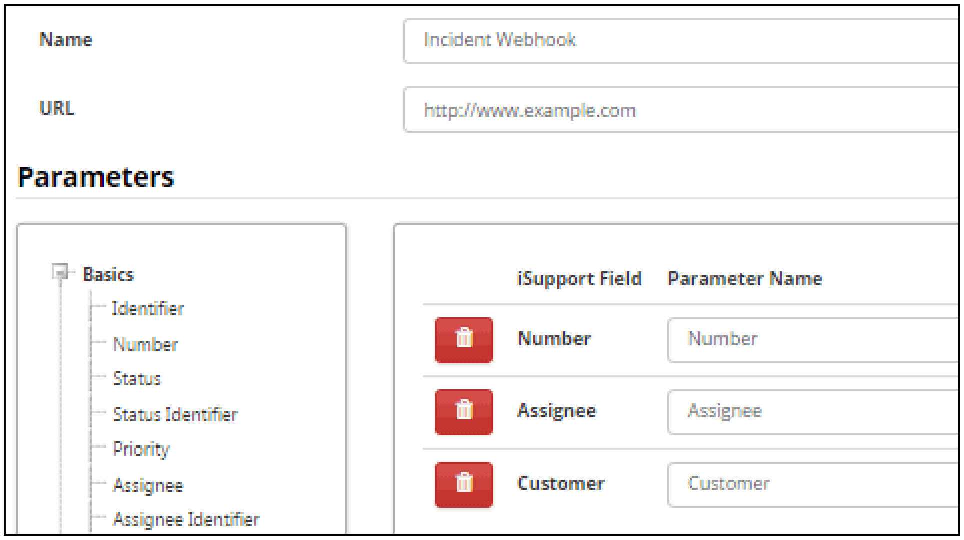
Assigning Categories to a Rule Group

Use the Add link on the Categories tab to associate the rule group with one or more categories. You can also do this via the Category screen.

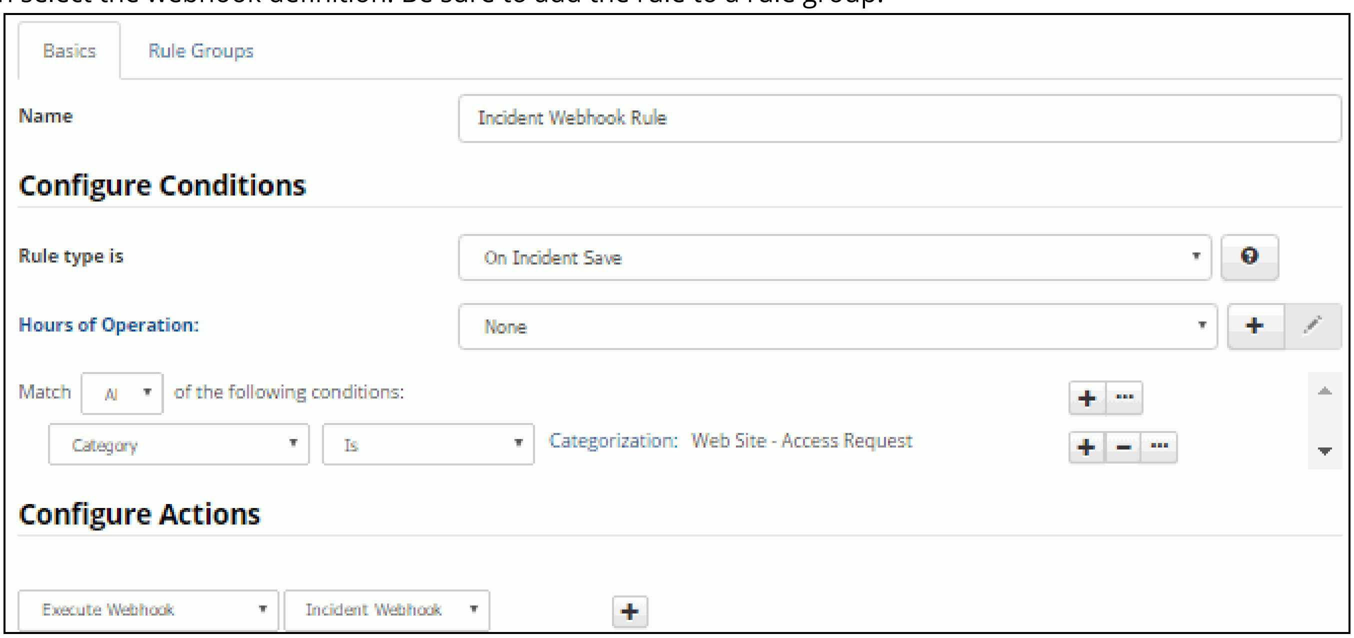
Configuring Webhooks

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.



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