Configuring iSupport Problem Functionality

Problem Management functionality is included if you have the Service Desk edition. Use it to document and track the root cause of incidents; you can configure associated incidents to be closed when a Problem record is closed.

Configuration Overview

Basic Configuration

Use the following options under Core Settings:

- Enable and set basic Problem options via the Feature Basics screen. See "Setting Problem Basics Configuration Options" on page 3 for more information.
- Configure **roles/permissions** for support reps and rep groups using Problem functionality via the Support Representatives screen. See the online help for more information.
- Configure display of problems and known errors via a **mySupport** customer portal. See the online help for more information.

Optional Automation

- Configure **rules** to send notifications, route, change field values, and initiate web hooks via the Options and Tools | Automate | Rules screen. See "Configuring Rules and Rule Groups for Problem Records" on page 9.

Optional Customization

Use the following options under Options and Tools | Customize:

- Set up **category combinations** via the | Categories screen. See the online help for more information.
- Create and customize Problem event **notifications** via the Custom Notifications screen. See the online help for more information.
- Create customized labels for the Incident **status levels** of Open and Closed via the Custom Status Labels screen. See "Defining Custom Status Labels" on page 22.
- Set up **custom fields** to include in the Problem screen via the Custom Fields screen. See "Configuring Custom Fields" on page 23.
- Include a field for an automatically generated number entering a **custom number** specific to your company via the Custom Numbers screen. See "Defining Custom Numbers" on page 28,
- Define **impact and urgency values** that 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 Change functionality. See "Defining and Mapping Impact and Urgency Values" on page 31.
- 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 33.
- iSupport includes a default Incident **screen layout**; use the Layouts screen 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. See "Configuring Screen Layouts" on page 34.

Optional integration

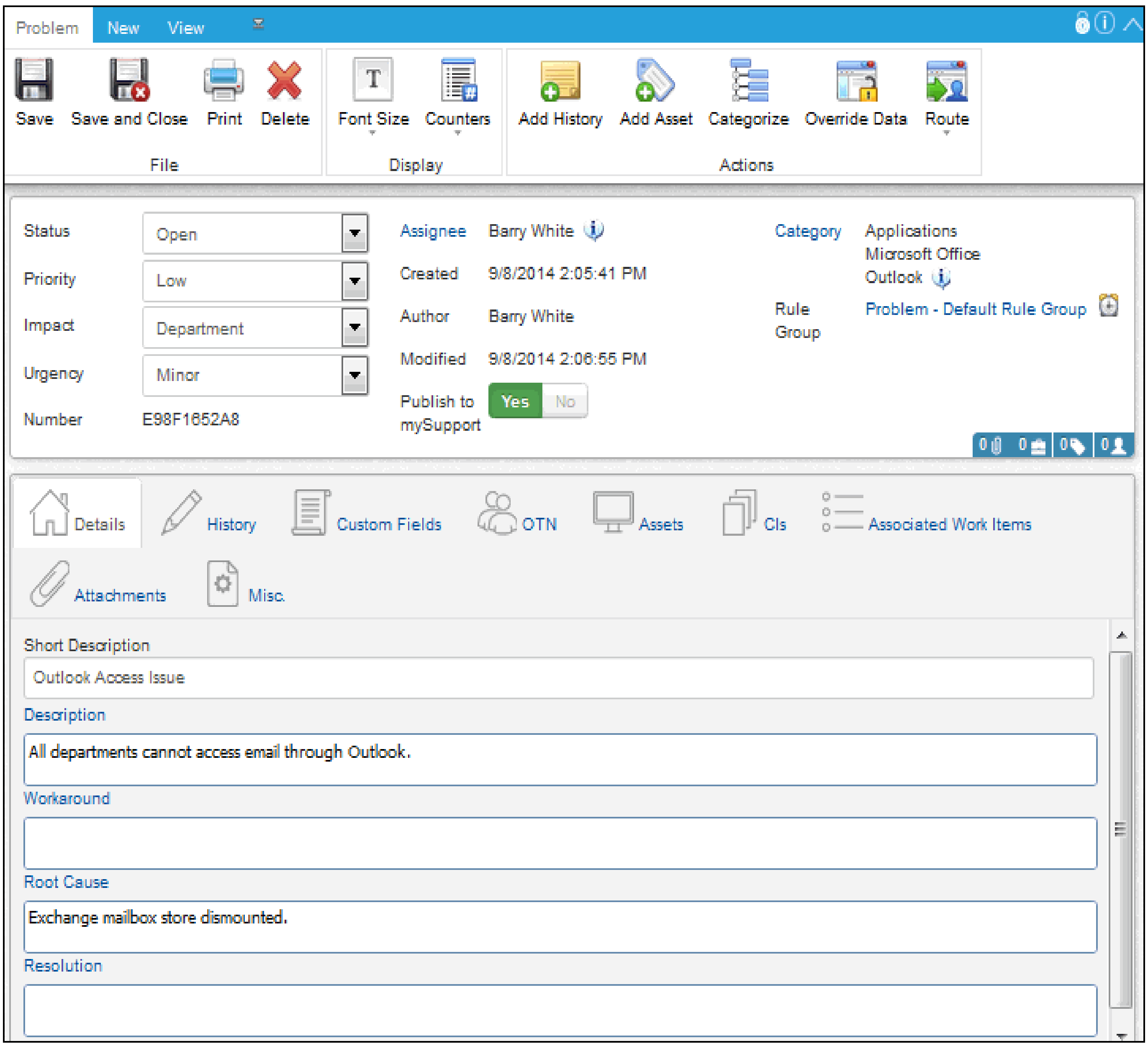
- Go to Options and Tools | Integrate | Social Media Integration to configure Problem descriptions to be **published to a Twitter account**. See "Configuring Social Media Integration" on page 39.
- Configure **webhooks** for posting Problem data to a web application. See "Configuring Webhooks" on page 45.

Administration

- If you need to **overwrite** fields on a saved incident, see "Using the Data Override Feature for Incidents, Problems, and Changes" on page 46
- **Archive** Problem records for database efficiency via the Options and Tools | Administer | Archiving and Database Maintenance screen. See "Archiving and Database Maintenance" on page 47.

The Problem Screen

Problem records can be created via the Rep Desktop and the Incident, Change, and Purchase Request screens. Workaround and Root Cause fields are included to enter troubleshooting information and details regarding any temporary methods of overcoming the problem. Note that when an entry is made in either the Workaround field or the Resolution field and the record is saved, the record is designated as a Known Error.

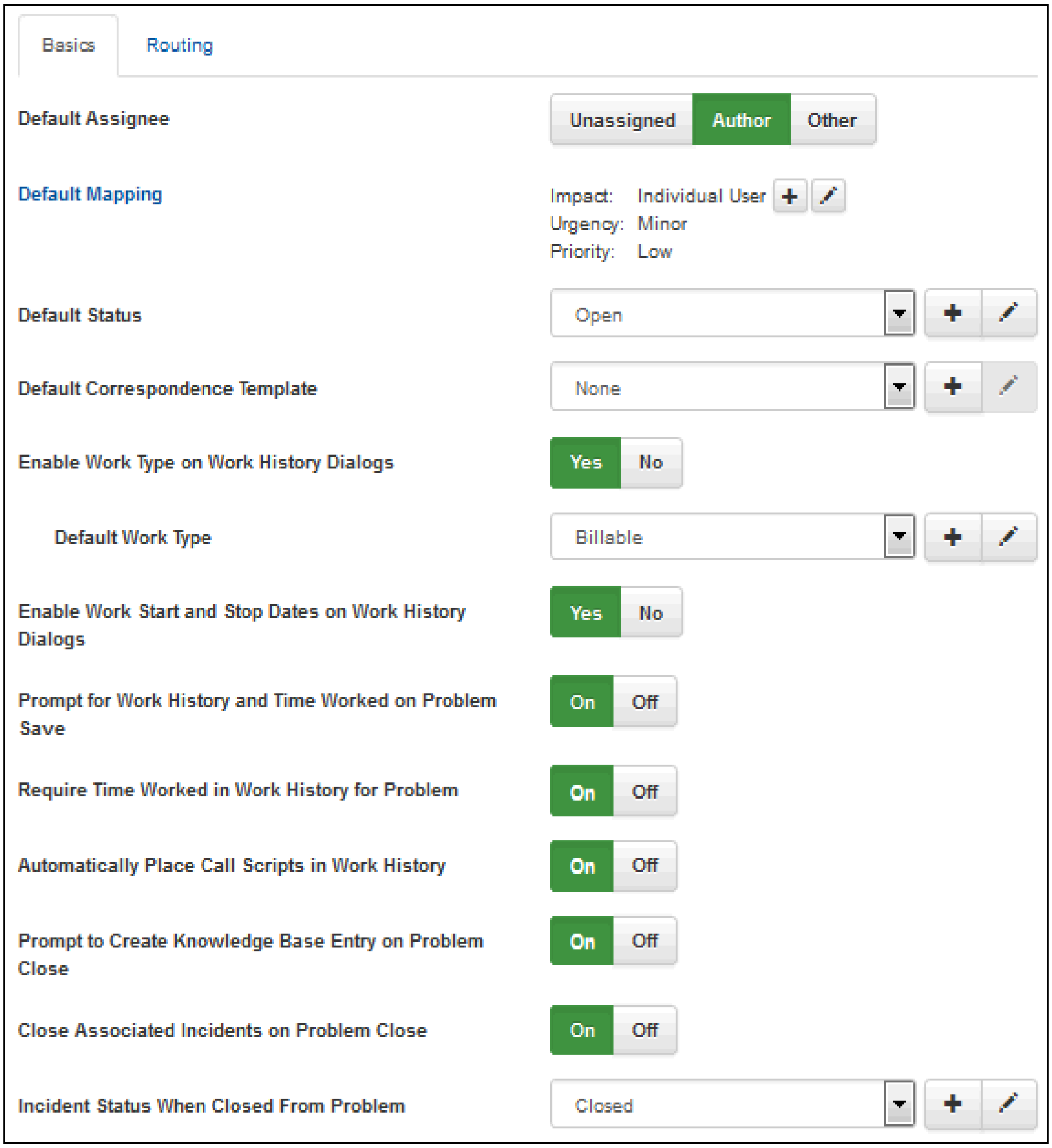


Setting Problem Basics Configuration Options

The Problem Basics screen enables you to configure defaults and other Problem options. For information on configuring routing, see "Setting Up Routing and Skills" on page 131.

Completing the Basics Tab

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



Default Assignee/Select Assignee - Select:

- Unassigned to use Unassigned as the default in the Assignee field in newly-created Problem records.
- Author to assign newly-created Problem records to the person who created the problem.
- Other to designate a support representative to populate the Assignee field by default in newly-created Problem records.

Default Mapping - Click the Default Mapping link to select the associated predefined values to appear as default in the Impact, Urgency, and Priority fields in the Problem screen. Use the Create New + and View/Edit icons to access the Impact and Urgency Mapping screen.

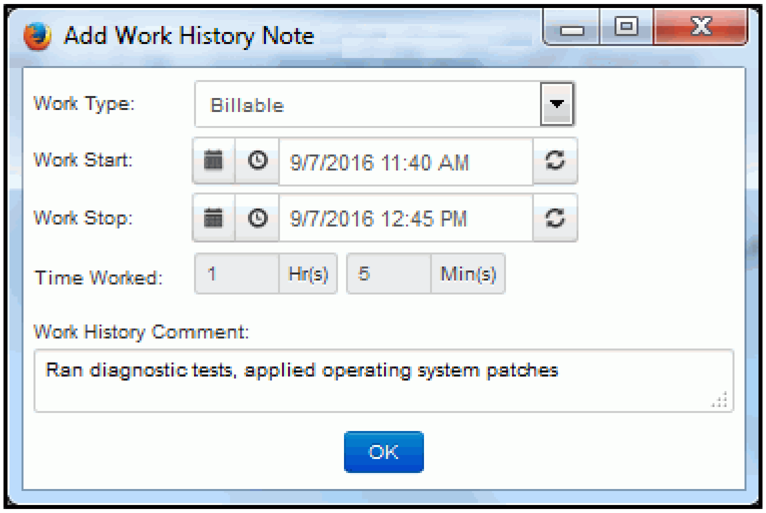
Default Status - Select the Open status to assign to newly-created problems. You set up custom status labels for the Open status on the Custom Status tab. Use the Create New and View/Edit icons to access the Custom Status Labels screen.

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

Enable Work Type on Work History Dialogs - Select Yes to include a Work Type field in the Work History dialog in the Problem 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 33.

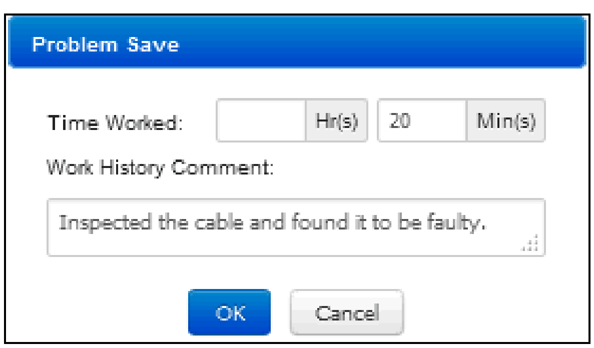
Enable Work Start and Stop Dates on Work History Dialogs - Select Yes to include Work Start and Work Stop fields in the Work History and Problem Save dialogs in the Problem screen.



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 Problem 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 Problem Save - Select Yes to display the Save dialog every time a support representative saves a problem.



Require Time Worked in Work History for Problem - Select Yes to require an entry in the Work History dialog Time Worked field in the Problem 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.

Prompt to Create Knowledge Base Entry On Problem Close - Select Yes to enable a prompt for creating a knowledge entry to display every time a problem is closed.

Close Associated Incidents on Problem Close - Incidents can be associated with Problem records in both the Incident and Problem screens. Select Yes to automatically close any associated incidents when a Closed status is selected for a Problem record. The text in the Resolution field will be used as default for the incident resolution, but a dialog will appear when the Problem record is closed for editing it.

Incident Status when Closed from Problem - If Yes is selected in the Close Associated Incidents on Problem Close field, select the Closed status to assign to the incident. Use the Create New + and View/Edit icons to access the Custom Status Labels screen.

Setting Up Routing and Skills

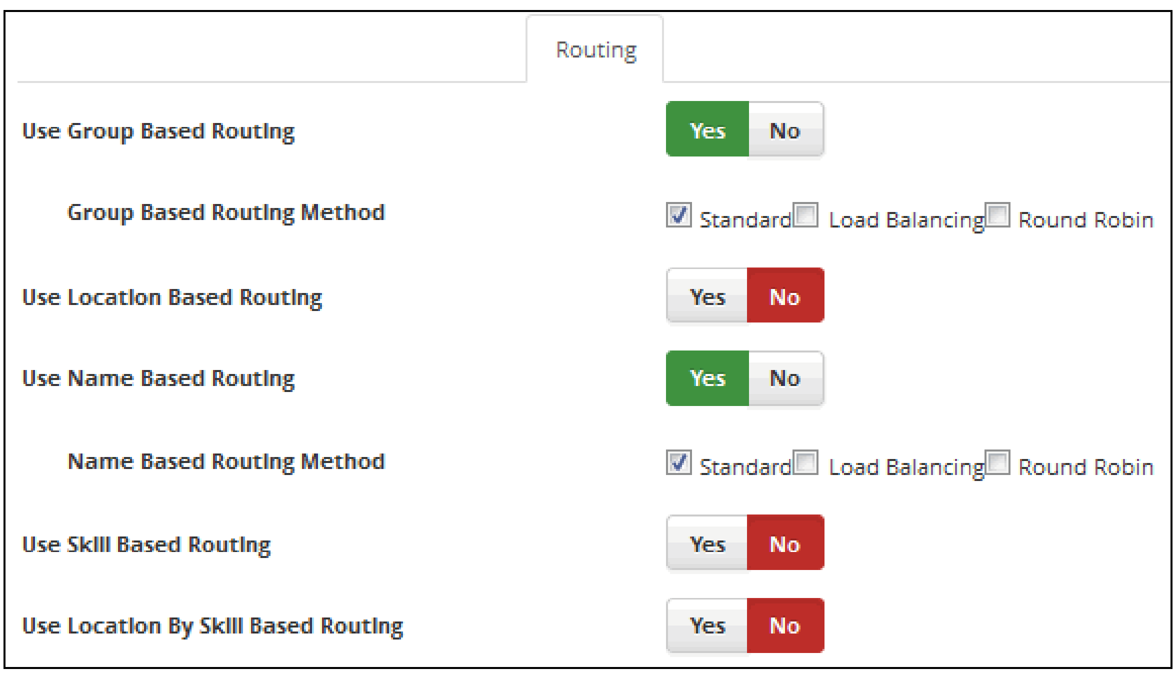
The routing setup process includes:

- 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 Profile 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 problem route is initiated.



All routing methods can also include load balancing, which involves weights based on problem 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 problem and the problem 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 problem. If all support representatives have the same weight for their problems, a random choice is selected for the assignee.

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

Use Group Based Routing - Select Yes to enable problems to be routed to available support representatives that are set up in groups. In the Problem 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 problem statistics, including weights based on problem 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 an problem 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.

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 problems based on current open problem statistics, including weights based on problem 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 problem 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 problem list of all available support representatives.
- Load Balancing - routes problems based on current open problem statistics, including weights based on problem priority. The available support representative with the lightest overall workload will be selected.
- Round Robin - the support representative who was assigned a problem 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 problem categorization to select qualified support representatives. After a support representative classifies the problem and selects skill-based routing, the category levels selected for the problem 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 problem categorization and current open problem statistics, which include weights based on problem 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 problem 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.

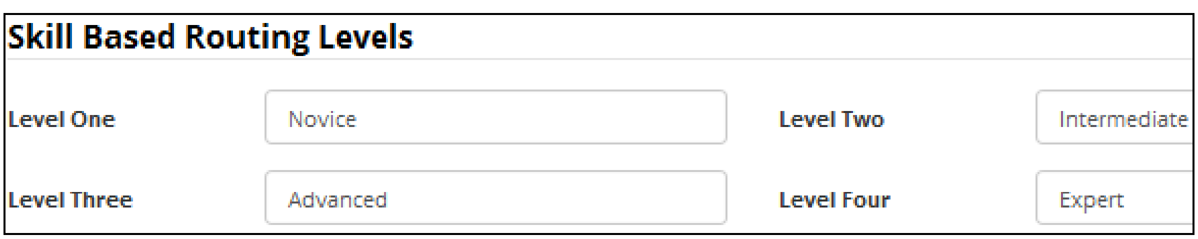
Use Location By Skill Based Routing - Select Yes to enable location by skill based routing, which routes to support representatives with matching skills at a certain support representative location. Once a location is determined, all support representatives in that location will be searched for matching 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 problems based on current open problem statistics, including weights based on problem 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 problem using the round robin method on the oldest date and time is selected.

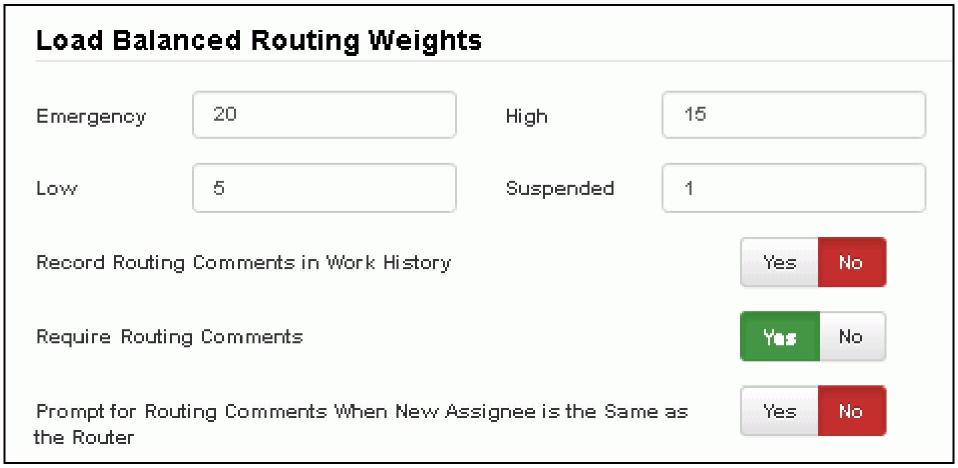
Skill-Based Routing Levels

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 problem priority. As discussed in the following example, a support representative’s workload is calculated by multiplying the number of problems at a certain priority level by the weight assigned to that priority level.



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

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

Even though the second support representative has three problems 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 problems with a suspended status. To weight all problems the same regardless of their priority, enter a value of 1 for all five problem weight fields.

Routing Comment Options

When a problem 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 problem.

Configuring Rules and Rule Groups for Problem Records

Use the Problem 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.** This functionality can be used to:

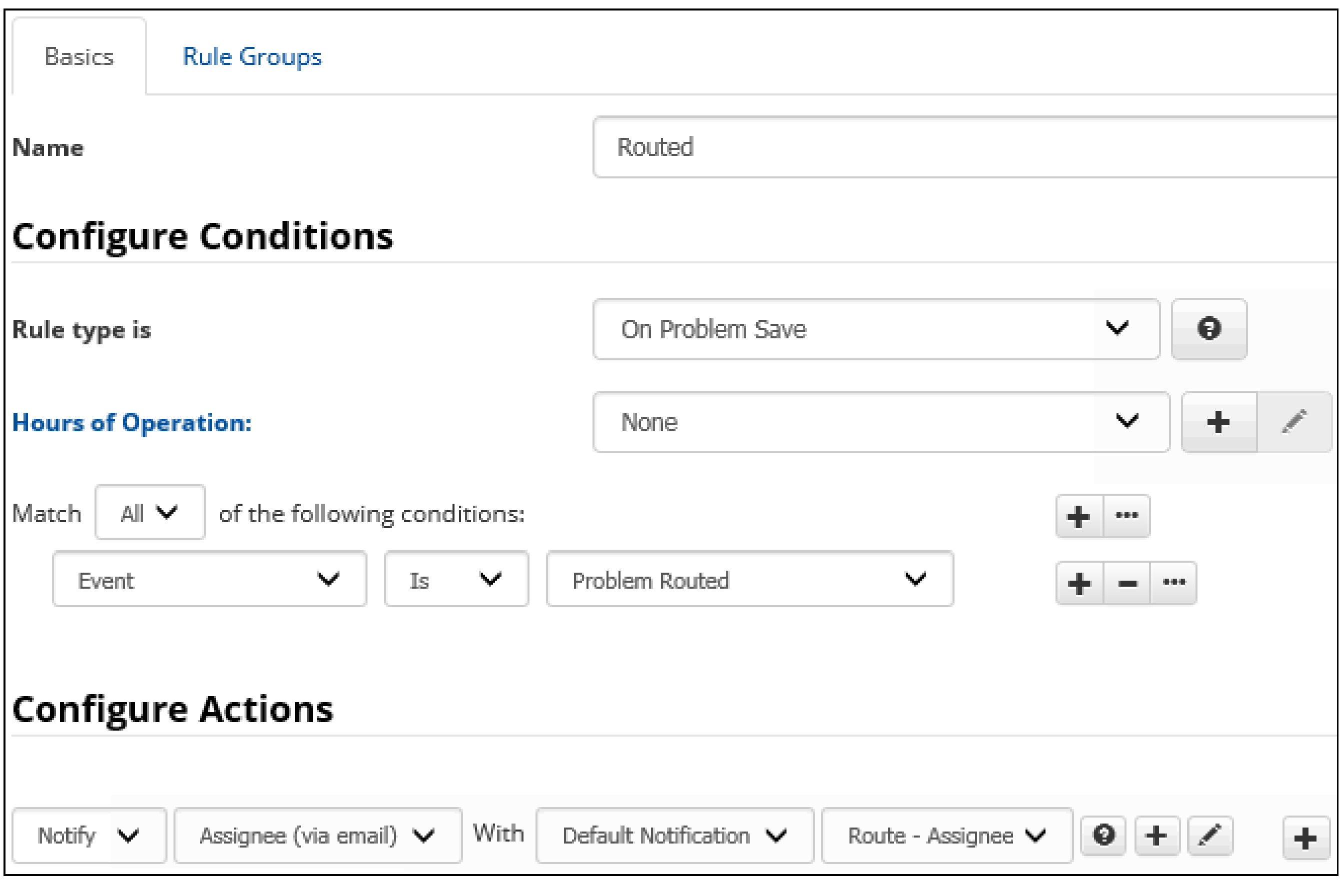
- Change values in the Assignee, Category, Impact, Urgency, Status, Publish to mySupport, and Priority fields, as well as in any custom fields
- Send notifications via email or desktop notification
- Route via load balancing or the round robin method
- Execute a webhook for posting Problem data to a web application

A default problem rule group will be included in iSupport on installation or upgrade, and upgrades will convert previously configured Problem notifications into rules in the default rule group.

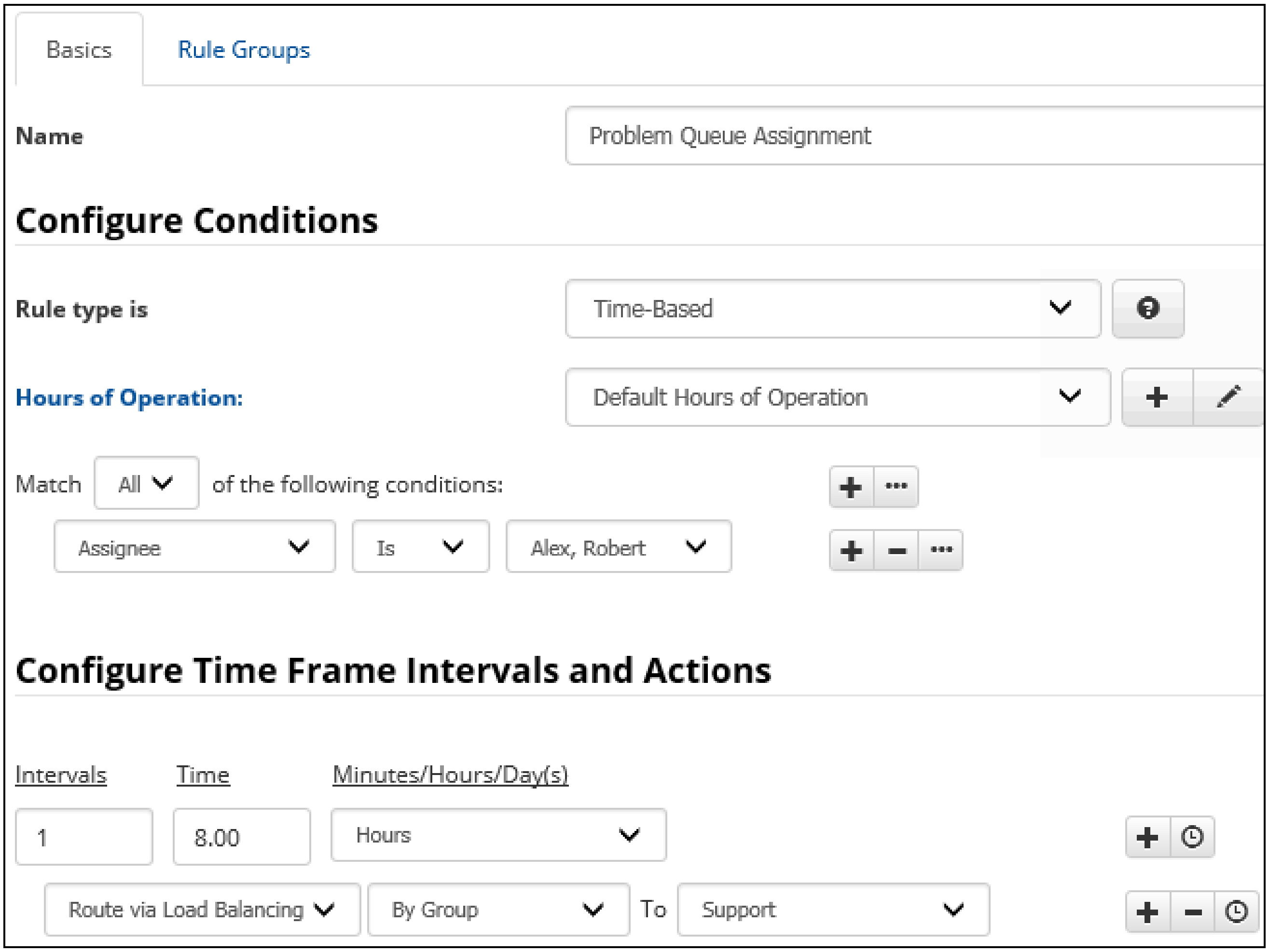
Rule groups are applied to problems through category combinations; when a problem is saved, the matching rule group is first determined. (If no rule group is associated with the category combination, the default rule group will be applied.) Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed. You can use the Problem 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 19 for more information.

Rule Types

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



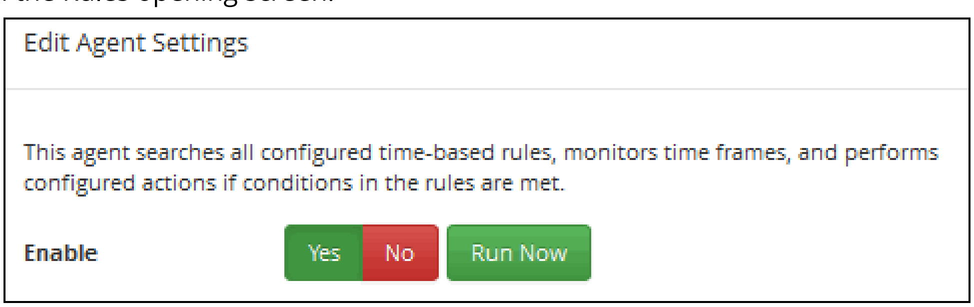
Time-Based and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon problem save, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.



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.

If you are configuring Time-Based and Time-Based: Cumulative rules, ensure that the Time-Based Rules agent is via the Agent 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.

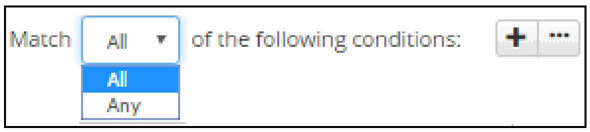
Creating Rules

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 11 and “Configuring Actions” on page 13 for more information. See “Creating Time Frame Intervals for Time-Based Rules” on page 16 for information on configuring interval time frames and actions to perform with each set of intervals.

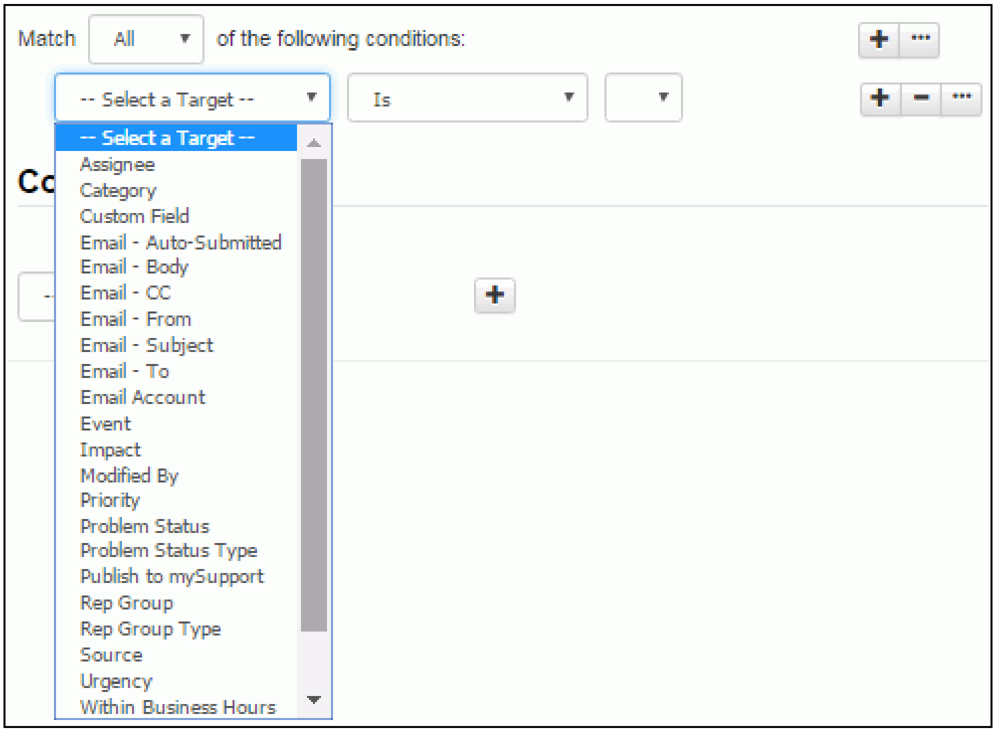
A configured **Hours of Operation** definition of 24 hours a day/seven days a week or selected date and time ranges can be used for the effective time frame for a time-based rule and for an on-save rule with a condition that includes "Within Business Hours". The default Hours of Operation definition 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

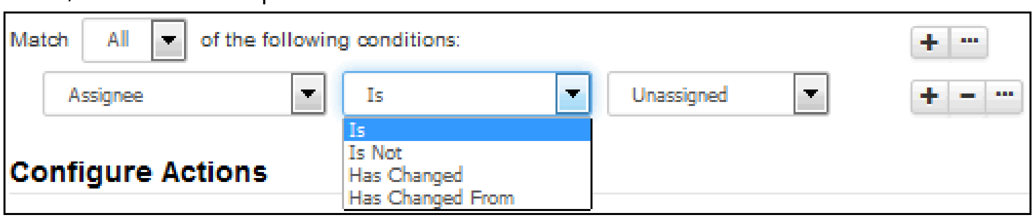
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



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 problem save. In the Select a Target dropdown, select what to evaluate: a problem field or event, or whether it is within business hours.



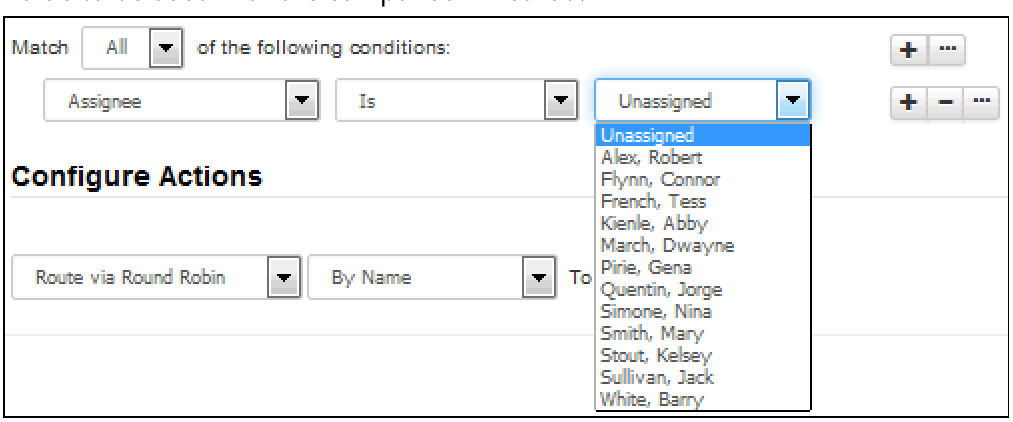
In the next dropdown, select the comparison method.



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.

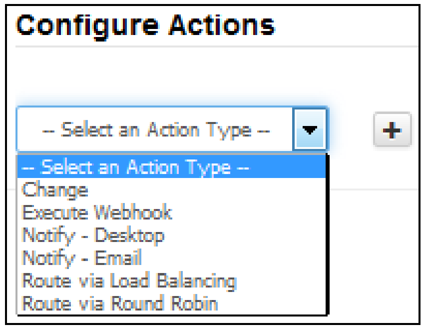


Note: If a rule contains a condition with the Work History Added to Problem event, the rule will be triggered immediately when the event occurs (even if the problem hasn't been saved). Conditions for all of the rules in the rule group will be evaluated and actions will be performed if conditions are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

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.

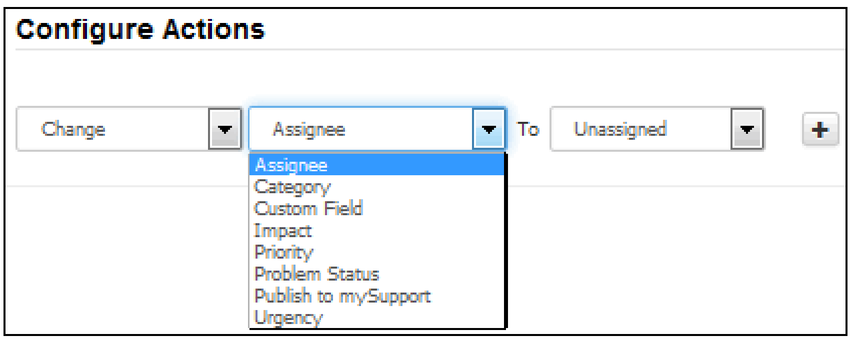
Configuring Actions

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.

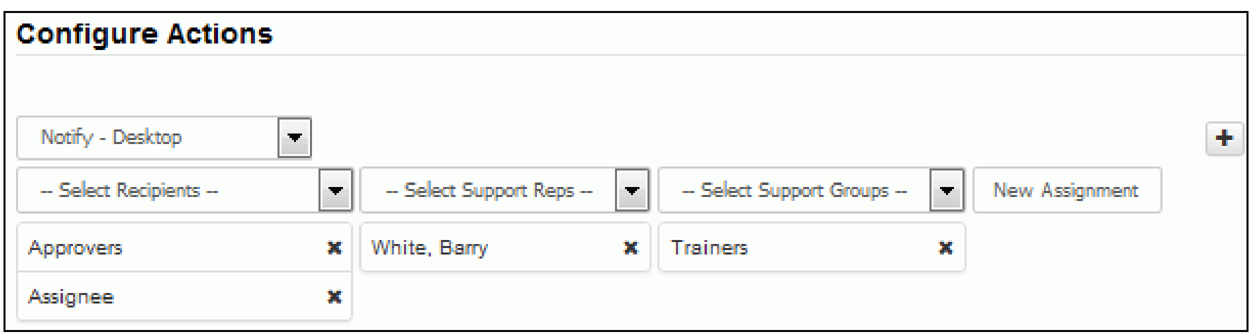


You can configure the following actions:

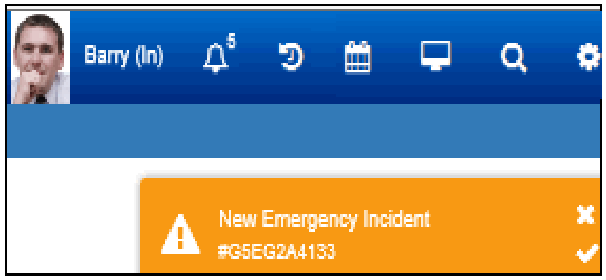
- **Change a field** by selecting Change, the field to change, and the value to change it to.



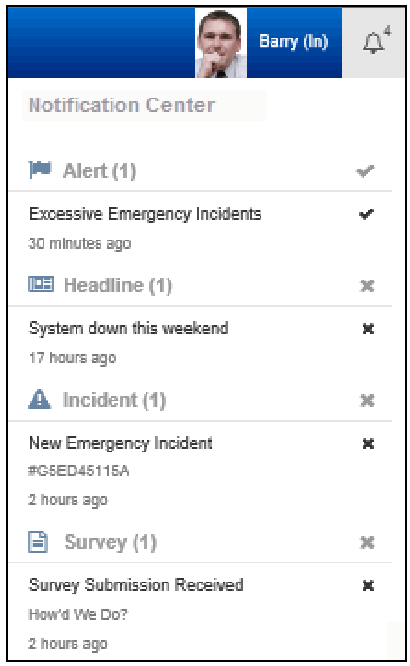
- **Send a notification** via desktop notification or email.
    - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



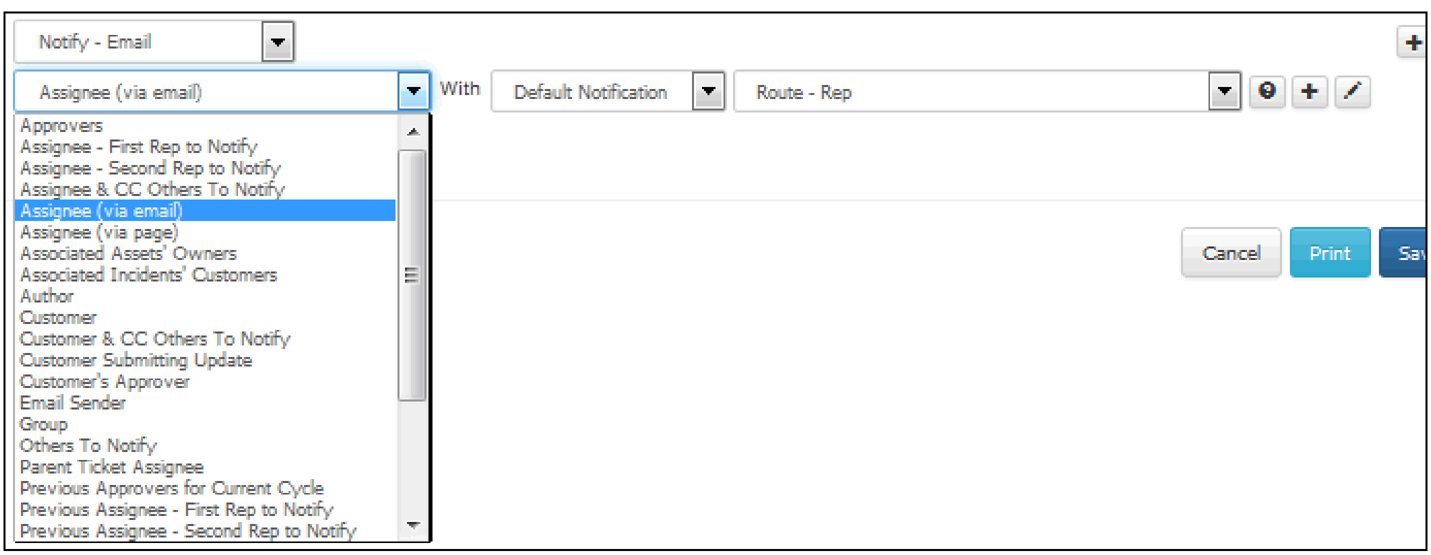
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.



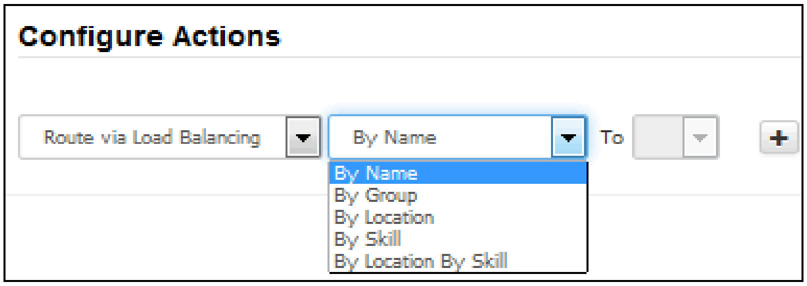
- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.



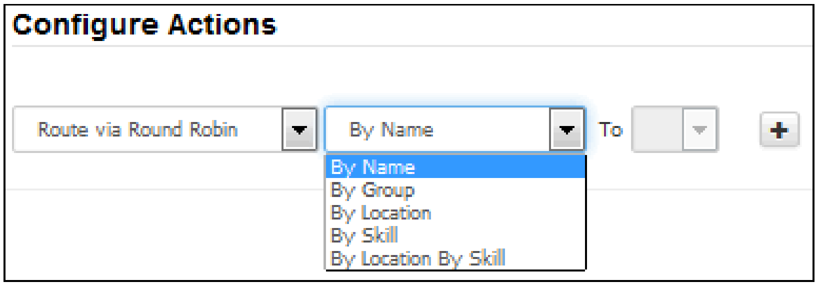
You can select the default or a custom notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient. Use the Create New and View/Edit icons to access the Custom Notification screen.

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

- **Route the Problem 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 Problem Management tab in the Feature Basics screen.



- **Route the Problem 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 Problem Management tab in the Feature Basics screen.

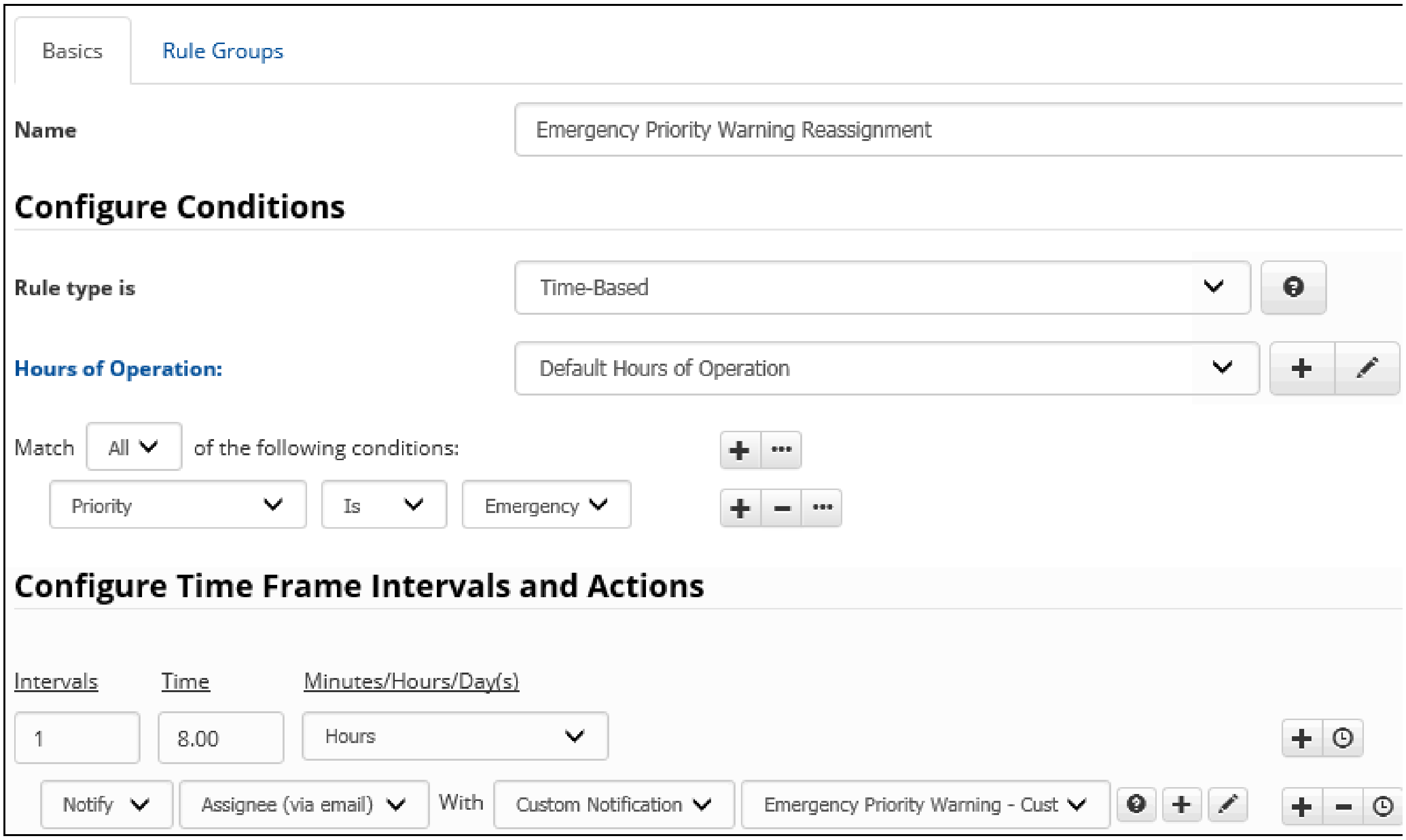


- **Execute a configured webhook** for posting Problem data to a web application. See “Configuring Webhooks” on page 45 for more information.

Creating Time Frame Intervals for Time-Based Rules

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.



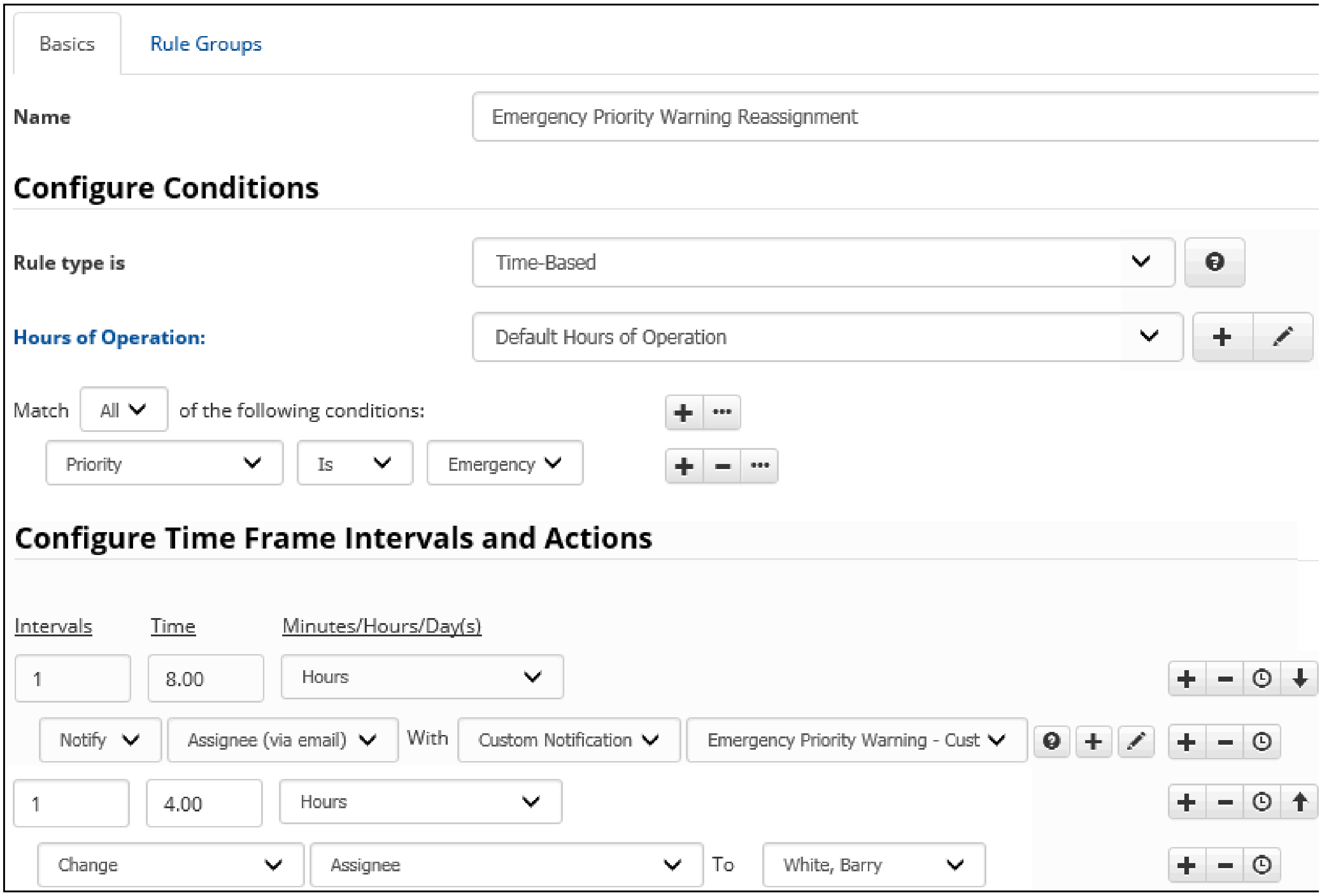
In the Configure Time Frame Intervals and Actions section, use the Intervals field to specify the number of times a time frame should be established and monitored, and use the Time and Minutes/Hours/Day(s) fields to specify the amount and unit of time in the time frame. *Note that the Day(s) option is 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 problem will be monitored for eight hours after initial save; if the priority remains at Emergency for the entire eight hours, the Emergency Priority Warning - Rep notification will be sent to the assignee.

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.

Configuring Multiple Time Frame Intervals

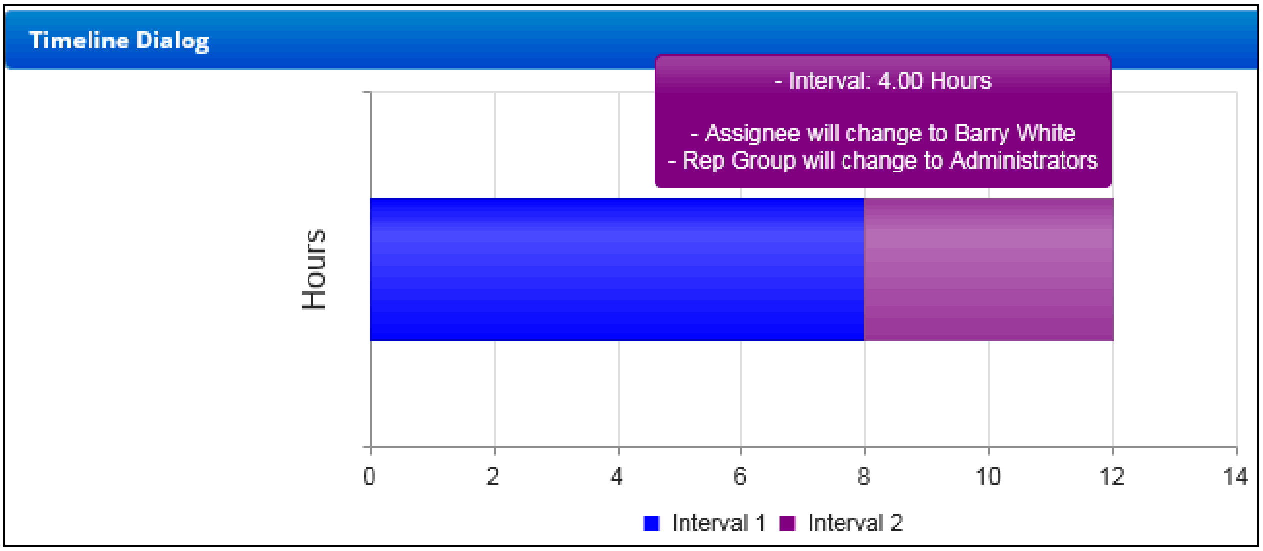
You can use the Add Interval icon to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up icons will appear for changing the order in which the interval time frames will be evaluated.

In the example below, the problem will be monitored for an eight hour time frame; if the priority remains at Emergency for the entire eight hours, the Emergency Priority Warning - Rep notification will be sent to the assignee via email. The problem will then be monitored for an additional four hour time frame; if the priority remains at Emergency for the entire four hours, the problem will be reassigned to the support representative Barry White.



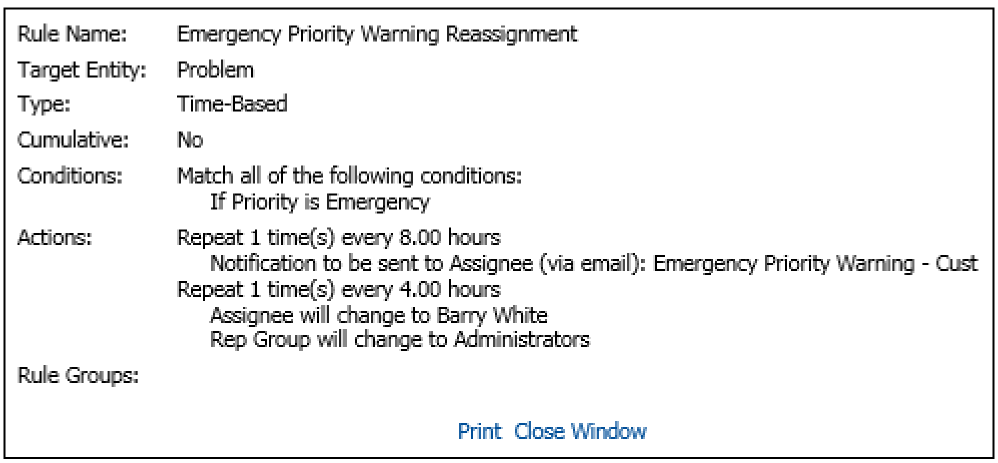
Displaying a Timeline for Configured Time Frame Intervals

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.

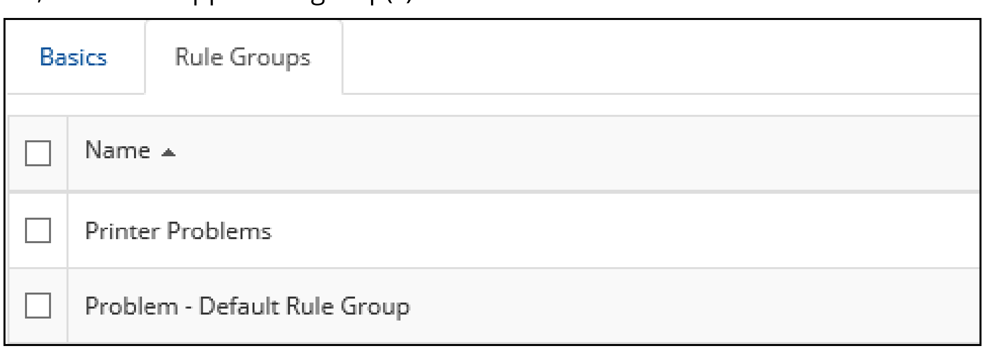


Rule Name:	Emergency Priority Warning Reassignment
Target Entity:	Problem
Type:	Time-Based
Cumulative:	No
Conditions:	Match all of the following conditions: If Priority is Emergency
Actions:	Repeat 1 time(s) every 8.00 hours Notification to be sent to Assignee (via email): Emergency Priority Warning - Cust Repeat 1 time(s) every 4.00 hours Assignee will change to Barry White Rep Group will change to Administrators
Rule Groups:	

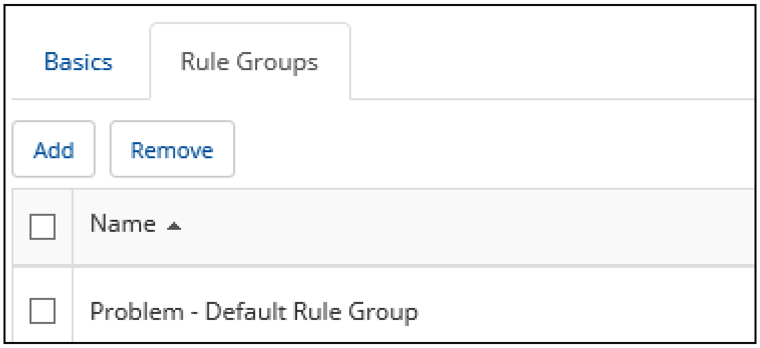
Print Close Window

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.



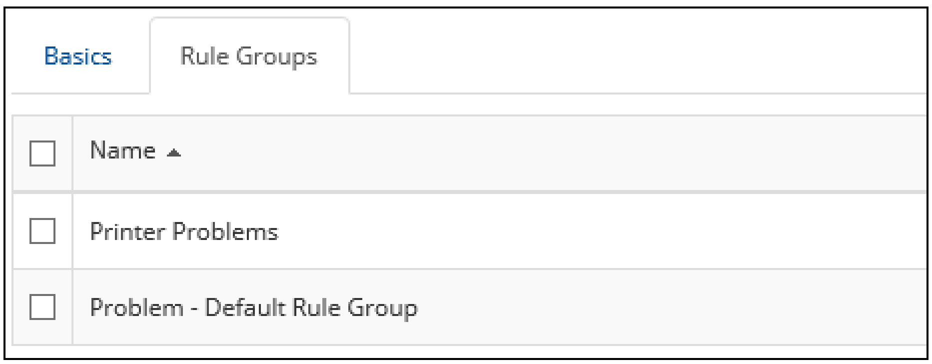
The rule group displays along with its position as shown in the example below:



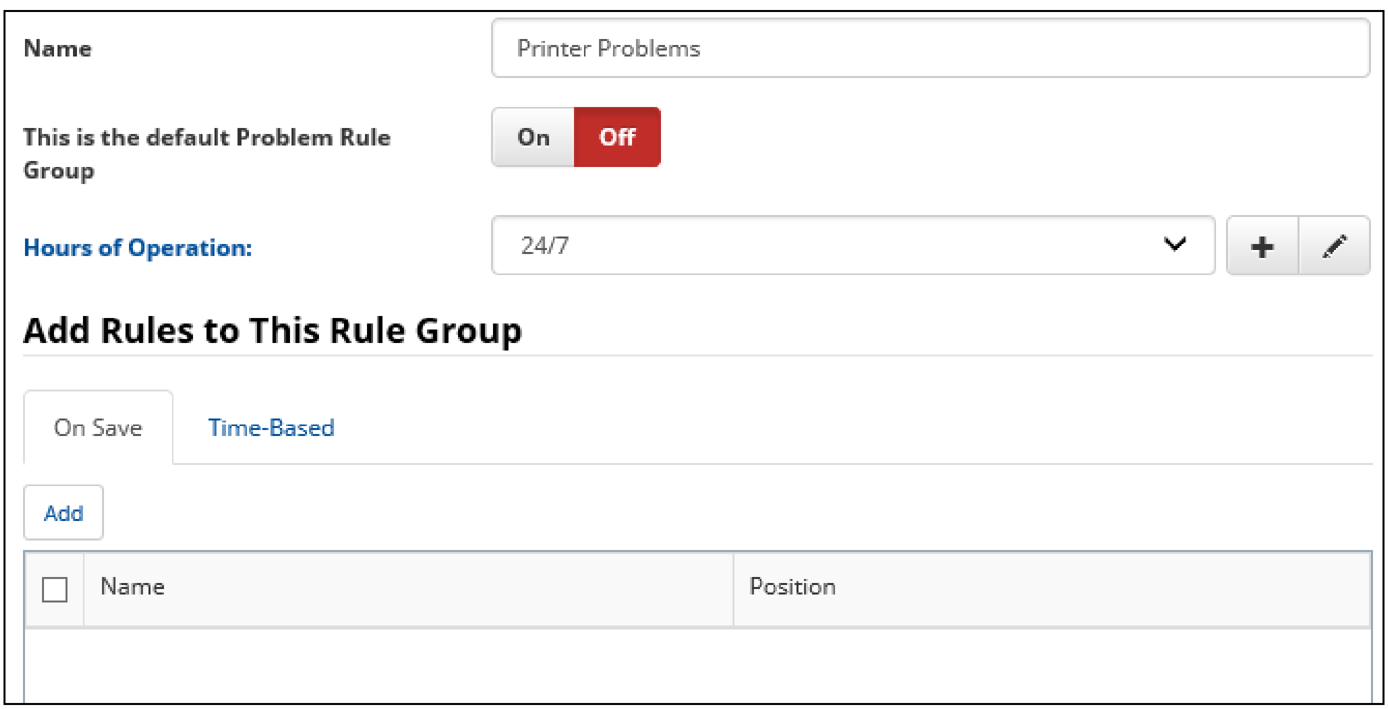
All rules in the rule group associated with a problem are evaluated when a problem is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

Click the Create link in the Problem Rule Groups screen to create a rule group that can be used as default and/or associated with categories.



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



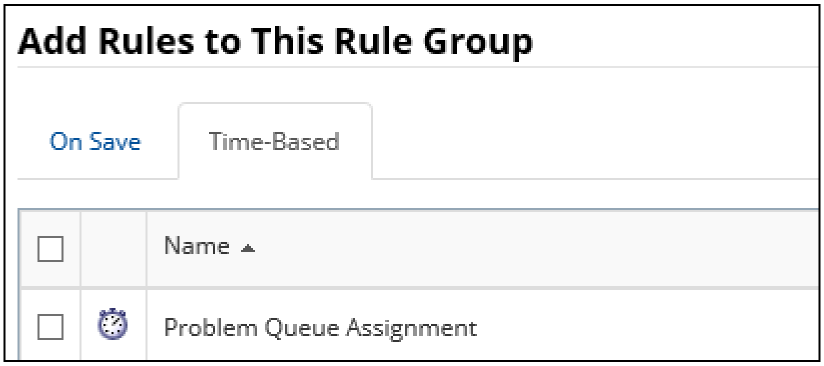
Name - Enter a name for the rule group; this name will appear in the Problem screen when the rule group is in effect for a problem.

This is the Default Problem 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 problem. One rule group must be designated as default for problems.

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 problem are evaluated when a problem 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 to a Categorization

Use the Add link on the Categories tab to associate the rule group with one or more categories; when the category combination is selected for a problem, the rule group will be applied. You can also associate a rule group with a category combination via the Category screen.

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:	Hardware Maintenance Rules
Target Entity:	Problem
Default:	No
Hours of Operation:	Default Hours of Operation
Customers:	
Companies:	
Categories:	Hardware - Printer
Templates:	
Hierarchy Templates:	
On Save Rules:	
Rule Name:	Printer Problem Assignment
Target Entity:	Problem
Type:	On Save
Conditions:	Match all of the following conditions: If Category is Hardware - Printer
Actions:	Will route via Load Balancing By Group to Hardware Repair
Rule Groups:	Hardware Maintenance Rules
Time-Based Rules:	

Print Close Window

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.

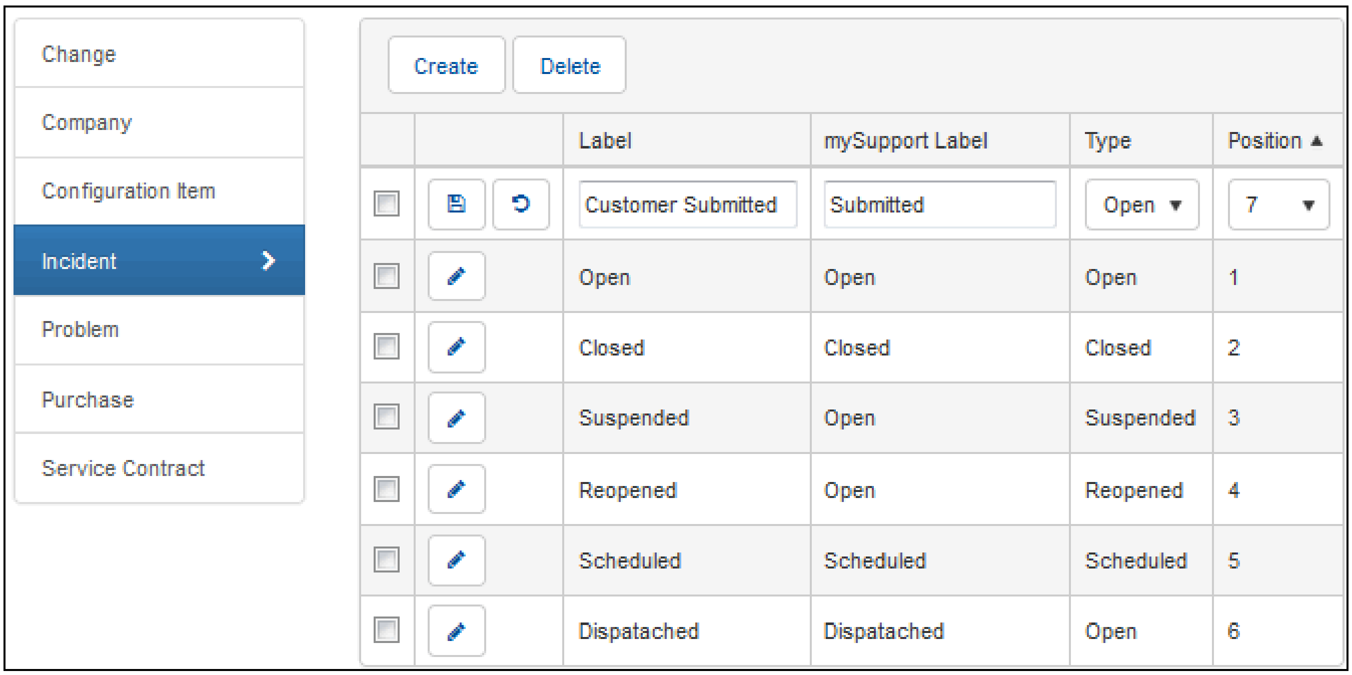
If you have the Incident Management Edition, you can define labels for the following work item types:

- 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.

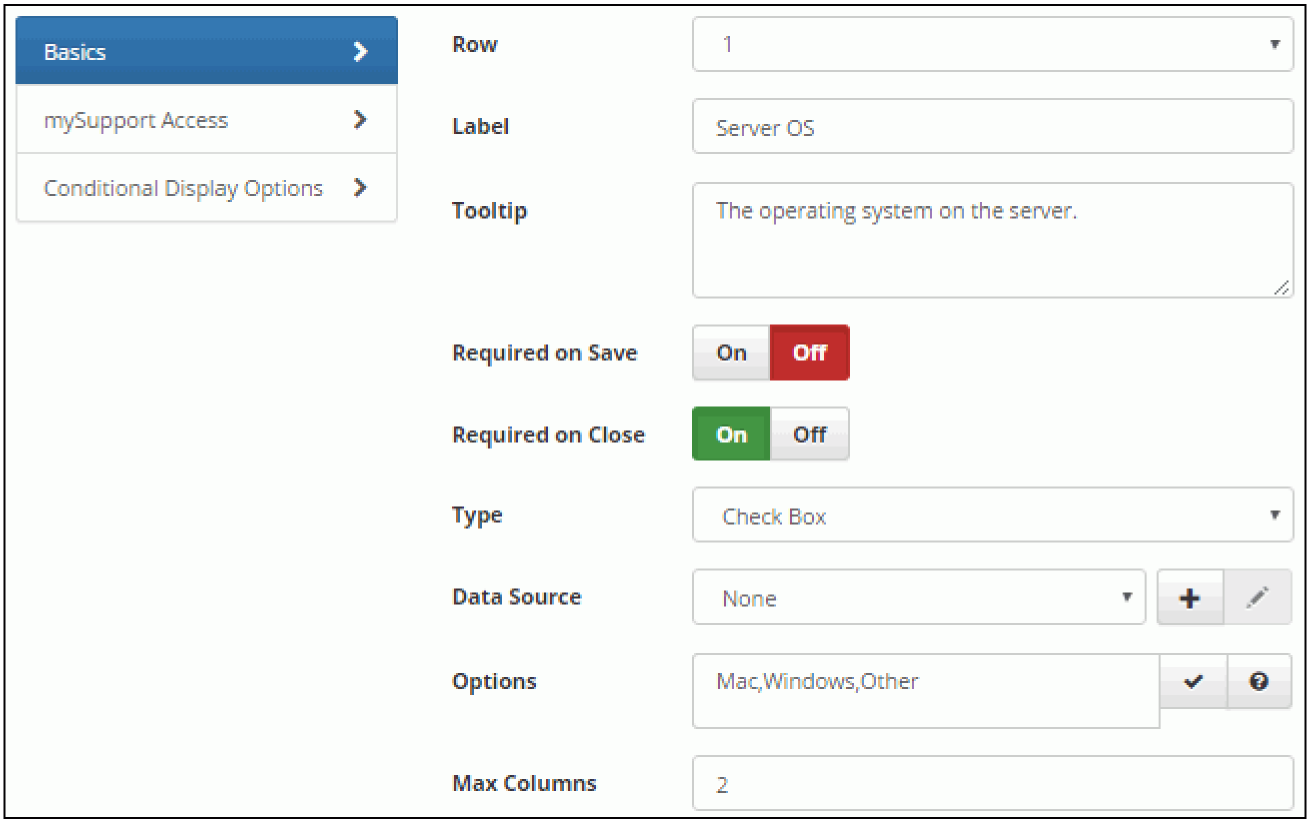
Position - Select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)

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.

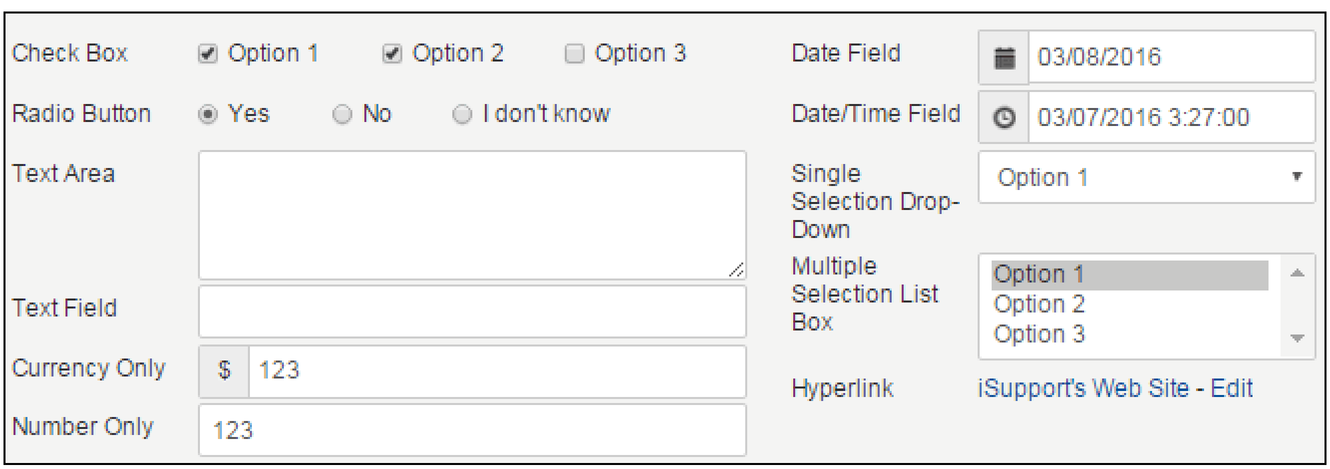
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see “Pulling From a Data Source” on page 26 for more 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 26 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)

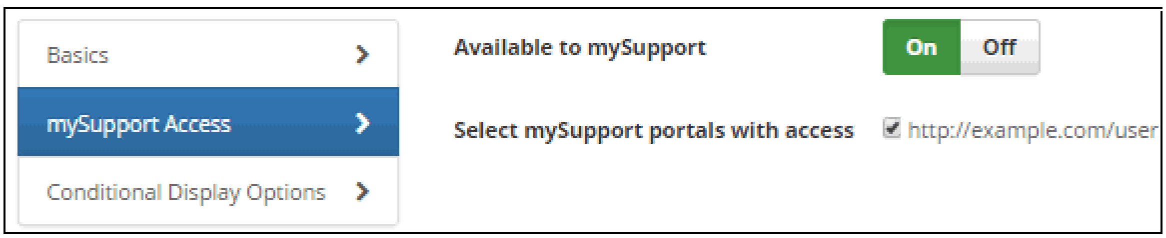
Max Columns/Max Rows - For Check Box and Radio Button type fields, enter the maximum number of columns to display (the fields will wrap to multiple rows); for a Multiple Selection List Box type field, enter the maximum number of rows to display (causing a scroll bar to appear).

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

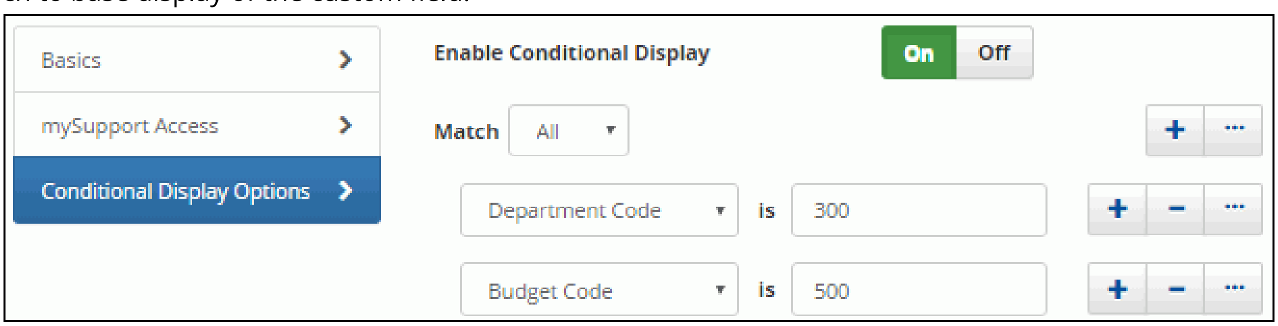
Available to mySupport - Select On to enable the field to appear on a mySupport portal.

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.

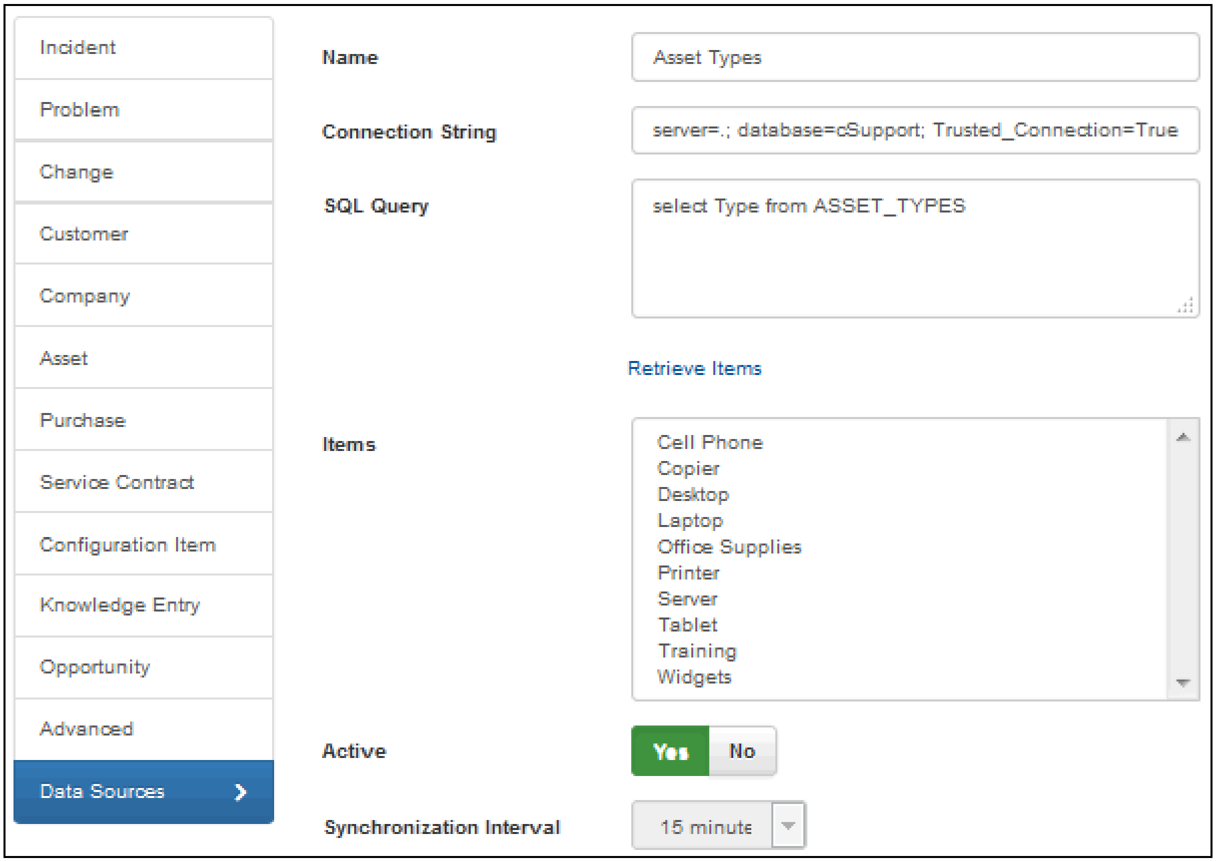


Use the Match *<All/Any>* field to specify whether you want **every** *<field>* is *<value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition + and Remove Condition − icons to display and remove a *<field>* is *<value>* search condition. Click the Add Condition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

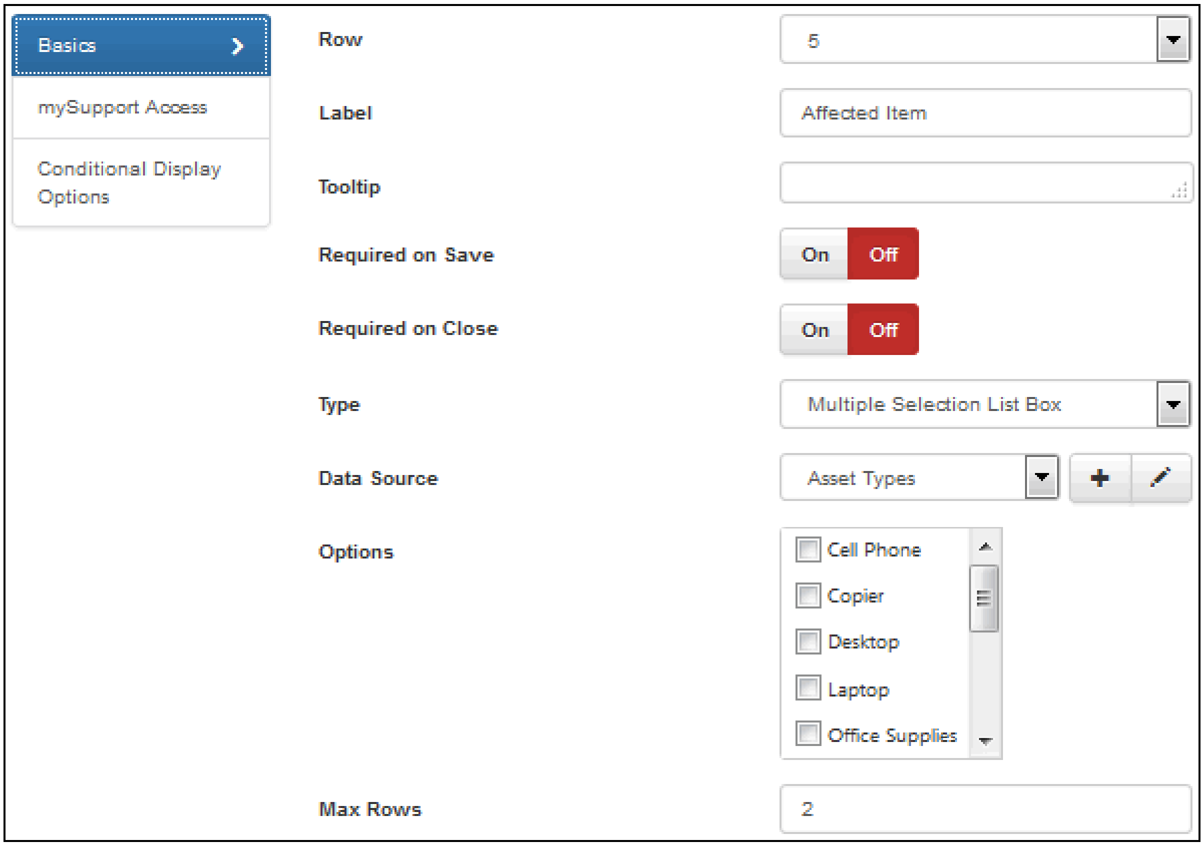
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Click the Retrieve Items button to populate the Items field using this string.

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.



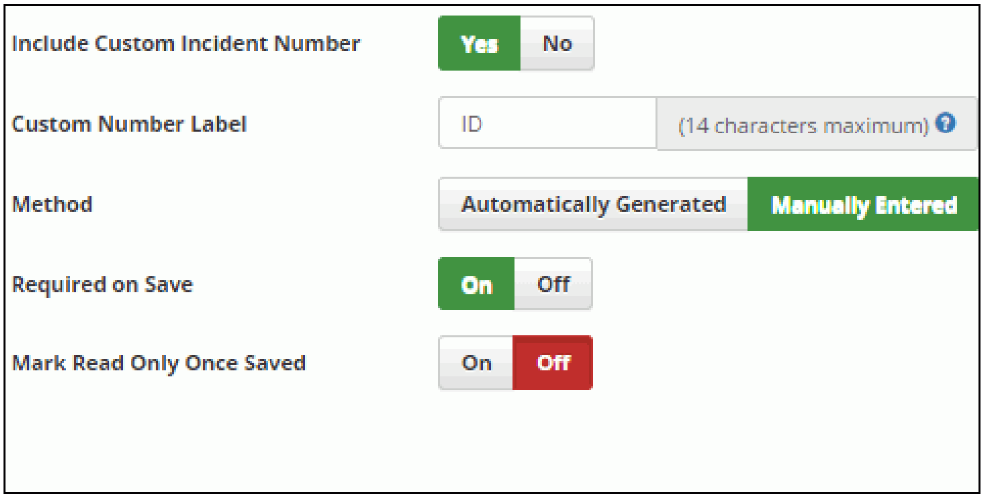
Defining Custom Numbers

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.

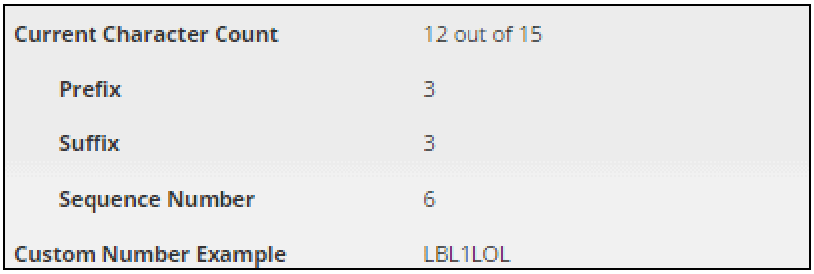
Configuring a Manually Entered Number

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

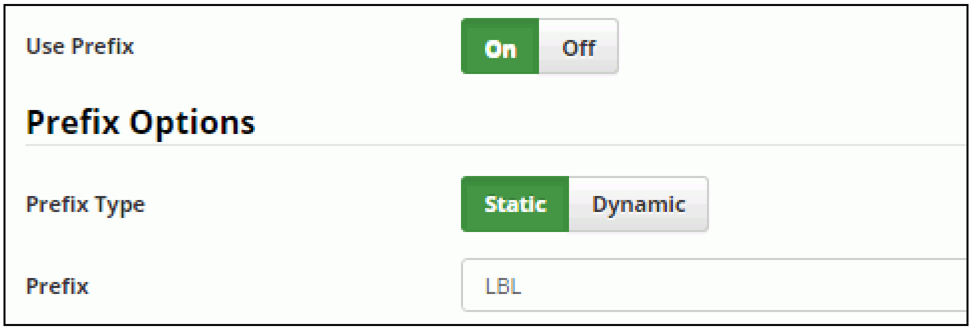
The Automatically Generated option creates numbers automatically based on prefix, suffix, and sequence settings that you configure. You can either use a static (fixed) custom prefix and suffix, restricted via a start and end number if desired. Prefixes and suffixes can be static (fixed) or dynamic; however, 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.



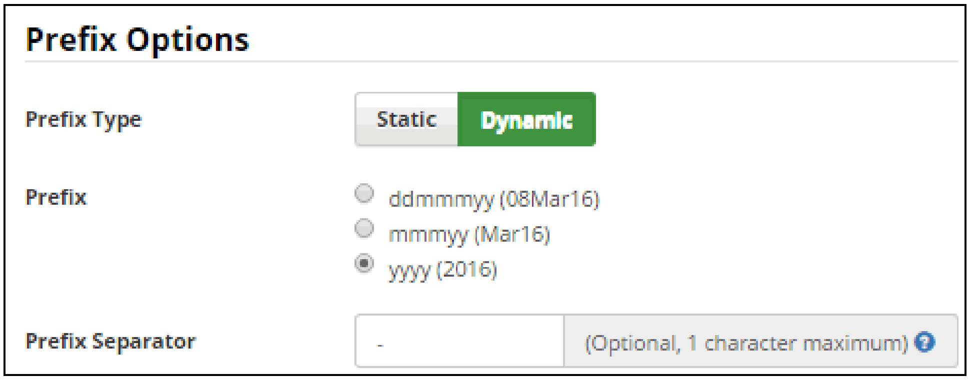
<u>*Configuring the Prefix*</u>

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.



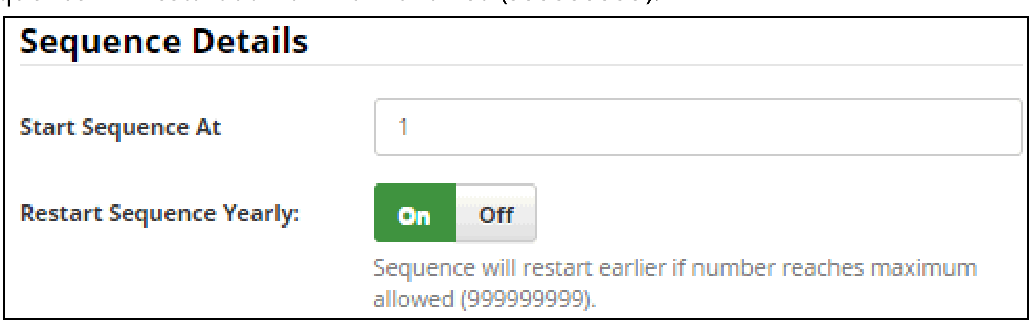
- If using a Dynamic prefix type, select the day, month, and year combination in the Prefix field. You can optionally enter a character (such as a hyphen) in the Prefix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



Configuring the Sequence

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

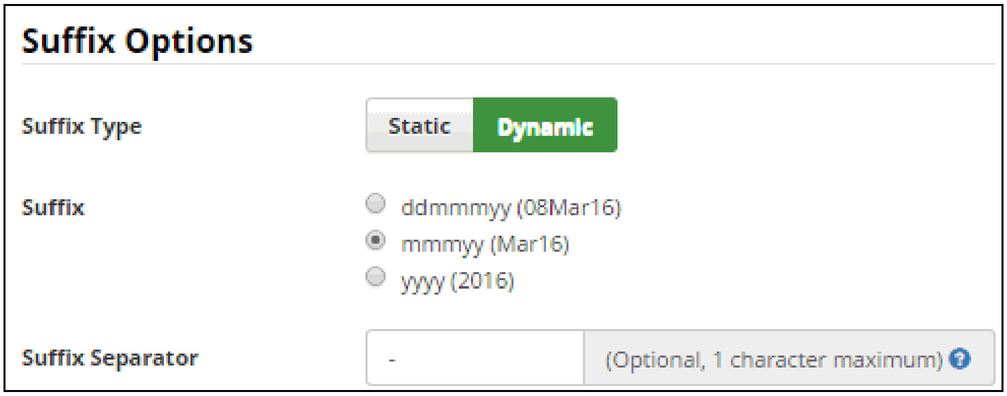
- Enter the number to start the sequence in the Start Sequence At field.
- Your selection in the Prefix field will determine the Restart Sequence field. If you select yyyy and you wish to restart the sequence when the first work item is created after 12:00pm on December 31, select Yes in the Restart 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).



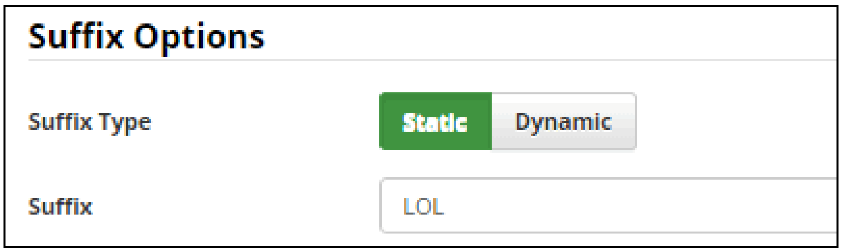
Configuring the Suffix

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.



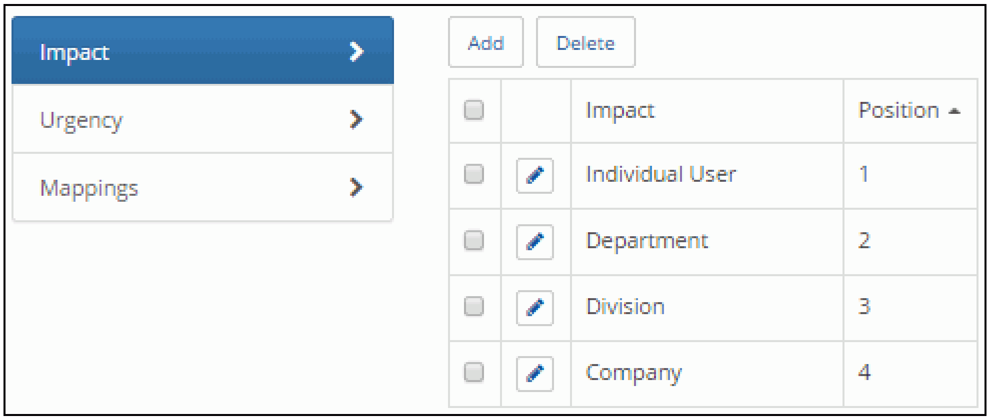
Defining and Mapping Impact and Urgency Values

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.

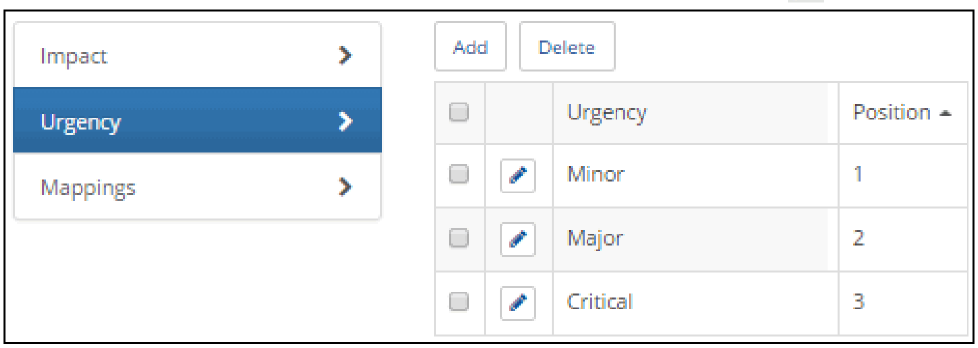
Adding Impact Values

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.



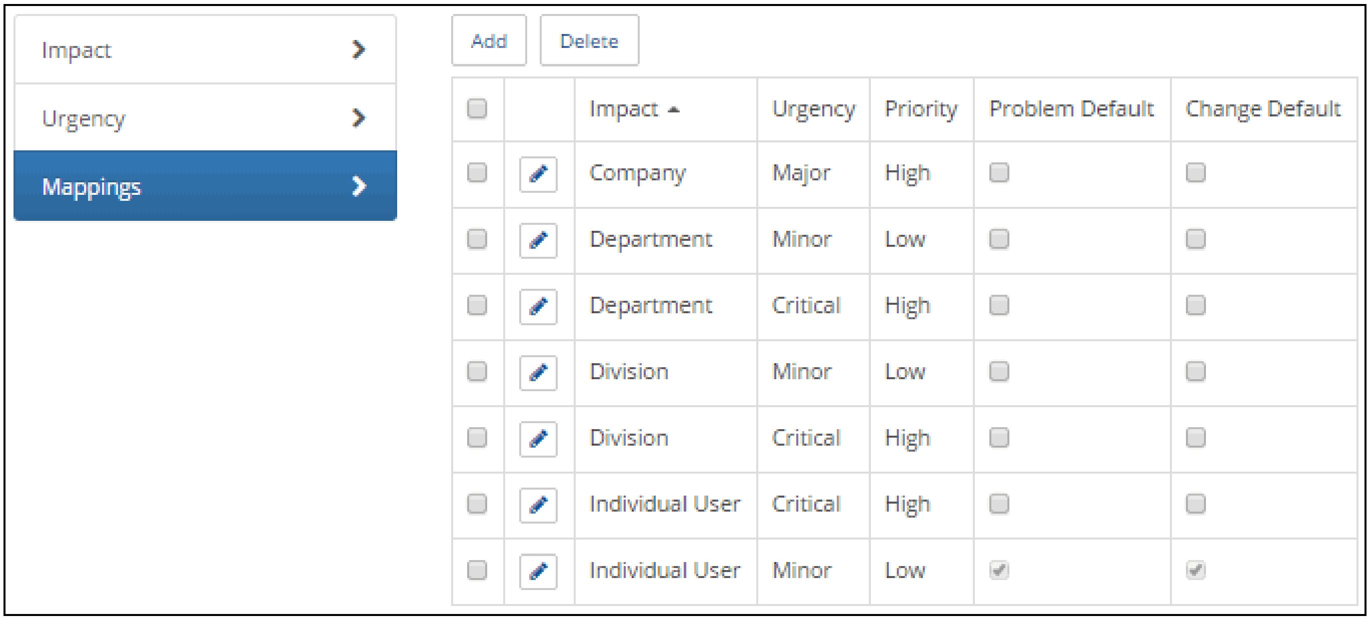
Adding Urgency Values

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.



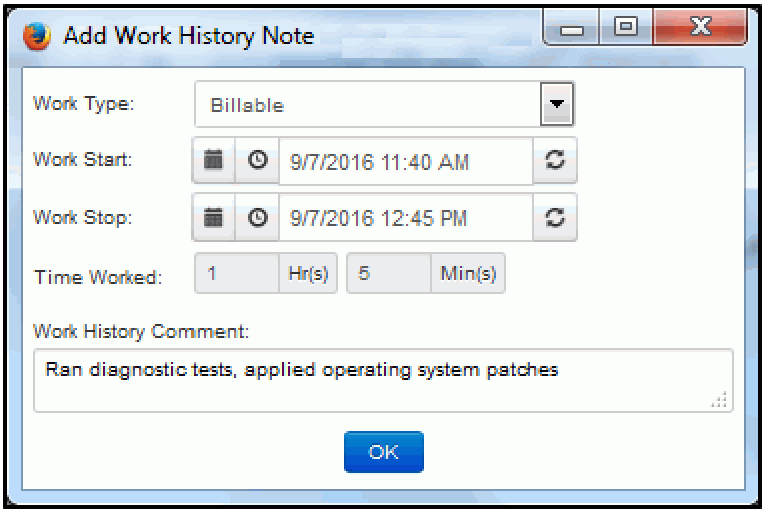
Defining Mappings

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.

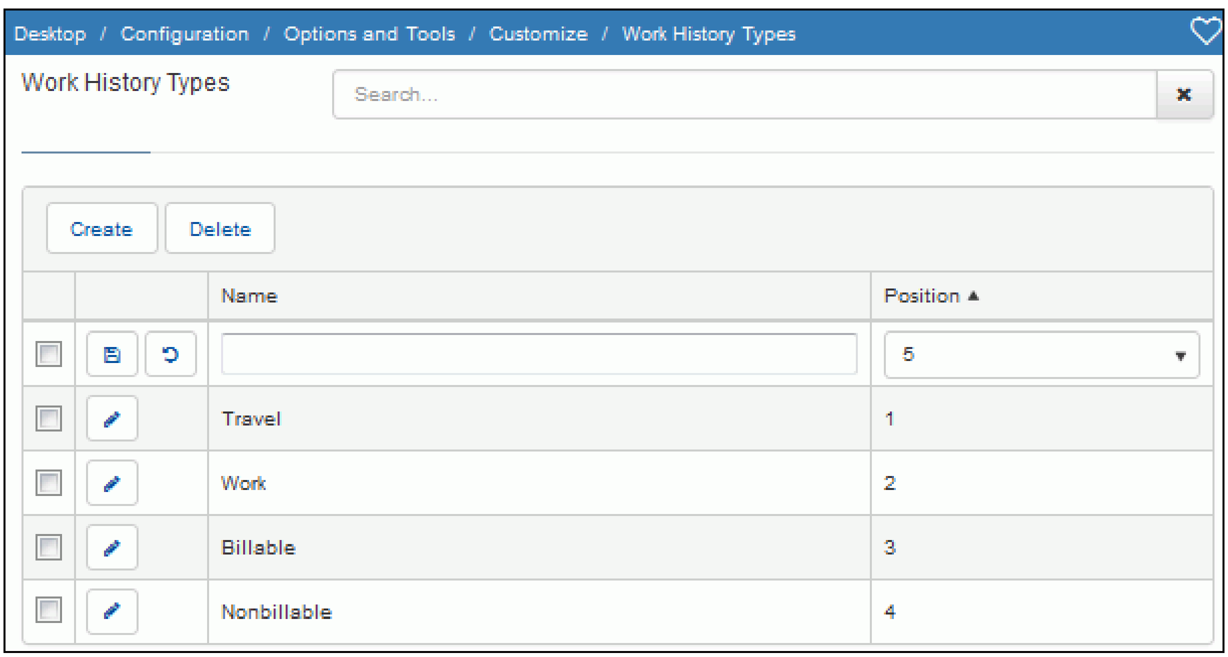


Configuring Work History Types

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.



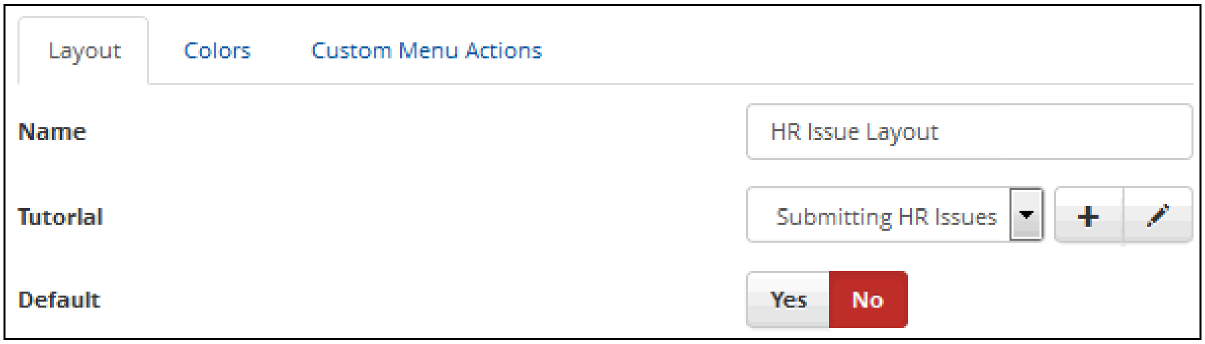
Use the Name field to enter work history types. In the Position field, select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)



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.

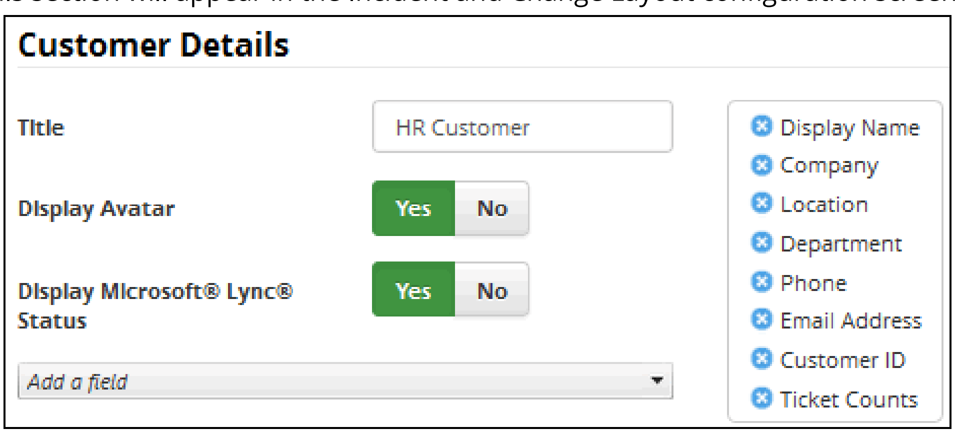
For Rep Client layouts, you can use the Preview button at the bottom of the Layout screen after adding required fields to the form to display your layout. You'll need to select a record to use for displaying field data.

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.

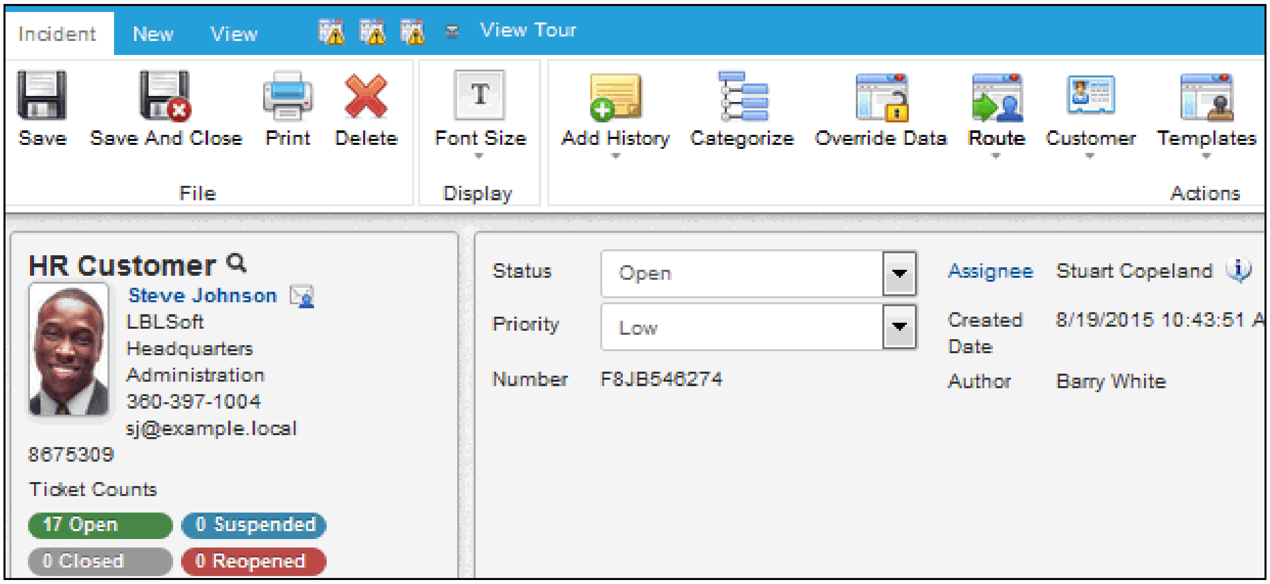
Configuring Customer Details

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.

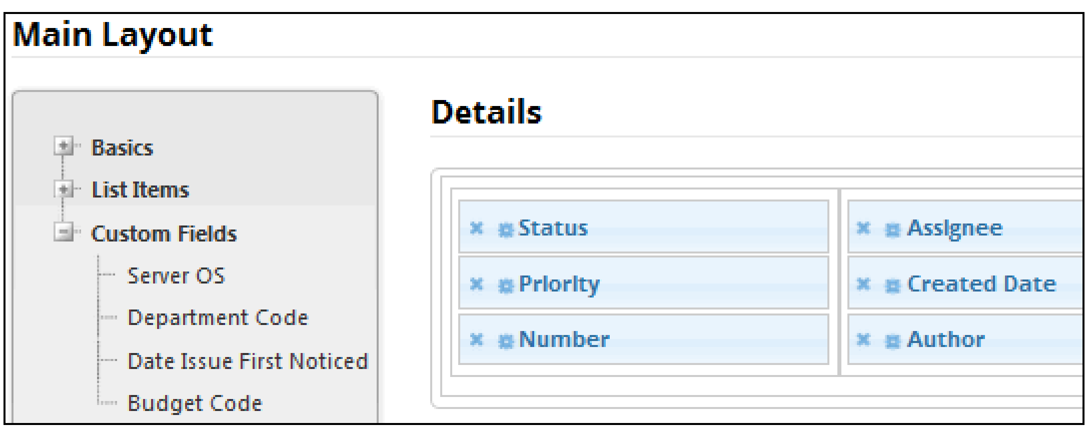
To include the customer's avatar (uploaded via the Customer Profile screen or the mySupport portal), select Yes in the **Display Avatar** field. Use the Add a Field dropdown to select the fields to appear in the upper left Customer area at the top of the Incident screen. Note that the **Ticket Counts**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

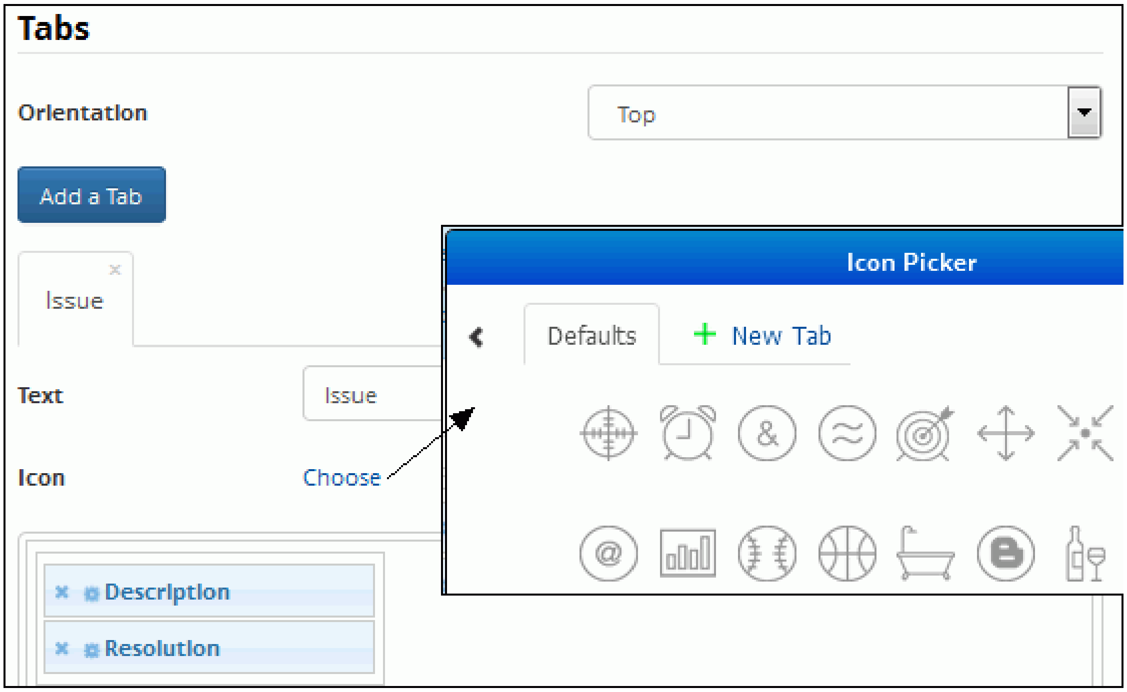
Adding Fields and Tabs

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.

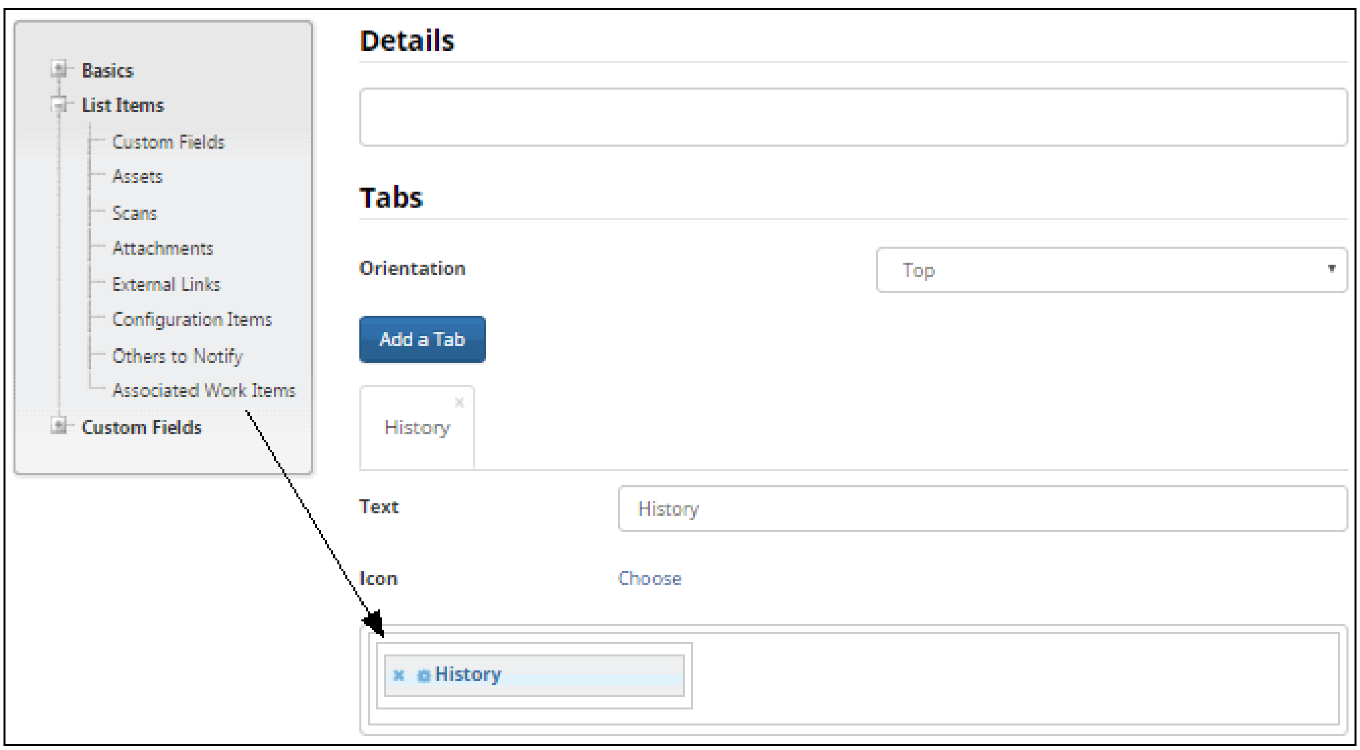


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

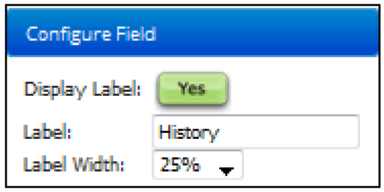


To add fields to the tab, drag fields from the selector on the left side of the Layout screen to the middle of the section below the Icon field.

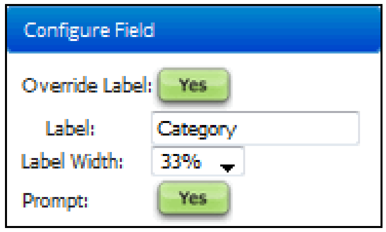


Configuring Fields

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.



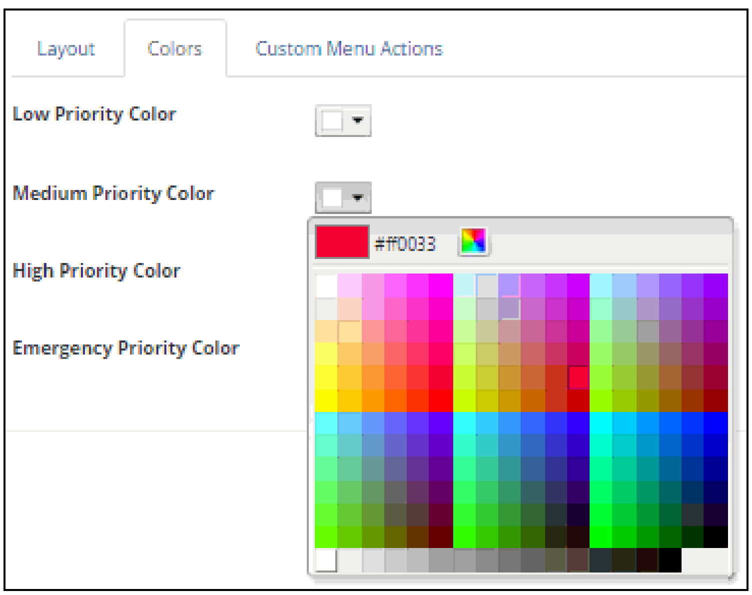
An **Override Label** field will be included for mySupport layouts; select Yes to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



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.

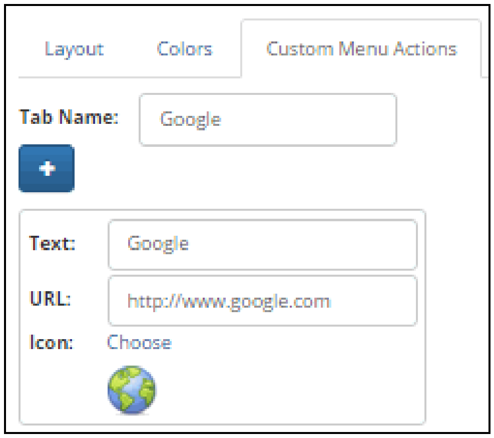
Configuring Priority-Based Background Colors

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.



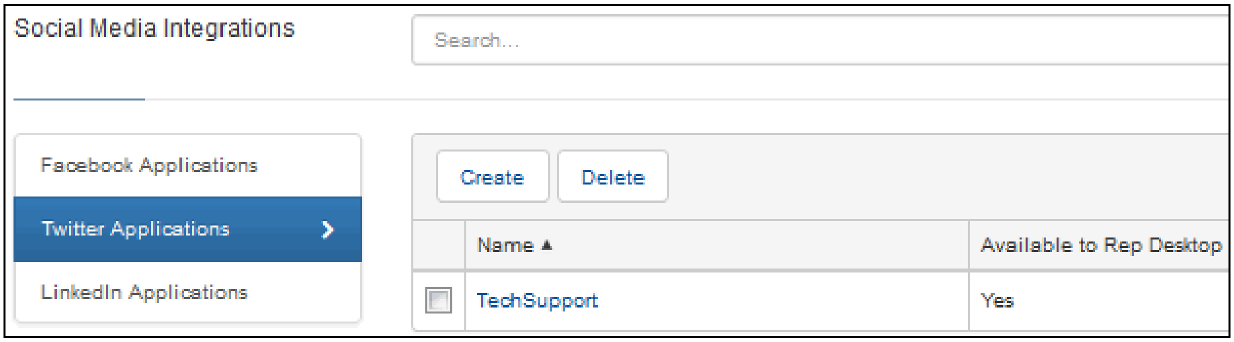
Configuring Custom Menu Actions

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



Configuring Social Media Integration

Use the Options and Tools | Integrate | Social Media Integration screen to configure settings that work in conjunction with Twitter notifications as well as the LinkedIn and Facebook linked account functionality on the mySupport portal.



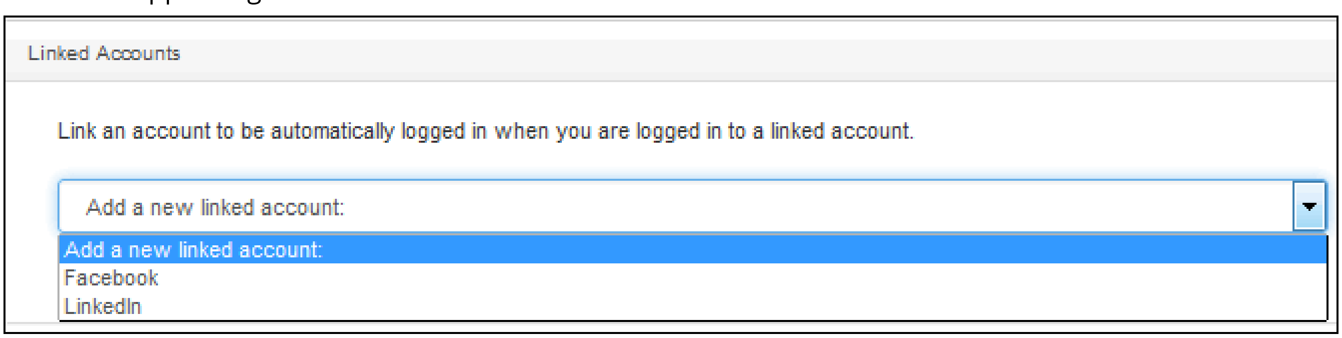
- **Facebook Applications** - Customers can link to and authenticate to the mySupport portal via a Facebook account; use the Facebook Applications tab to configure an application for this functionality. See “Facebook Applications” on page 39.
- **Twitter Applications** - A Twitter account and application must be configured in iSupport in order to use the Twitter and Twitter Monitor Desktop components, publish headlines and problems to Twitter, and send customer notifications regarding work item updates via Twitter. See “Twitter Applications” on page 41.
- **Linked In Applications** - Customers can link to and authenticate to the mySupport portal via a LinkedIn account; use the LinkedIn Applications tab to configure an application for this functionality. See “LinkedIn Applications” on page 43.

Note: iSupport utilizes or integrates with a number of third party applications and resources; changes in these external applications and resources may have a negative impact on functionality in iSupport. Depending on the nature and degree of the change, iSupport will, at its discretion, revise the current version of iSupport or make a corrective change in a future release of iSupport.

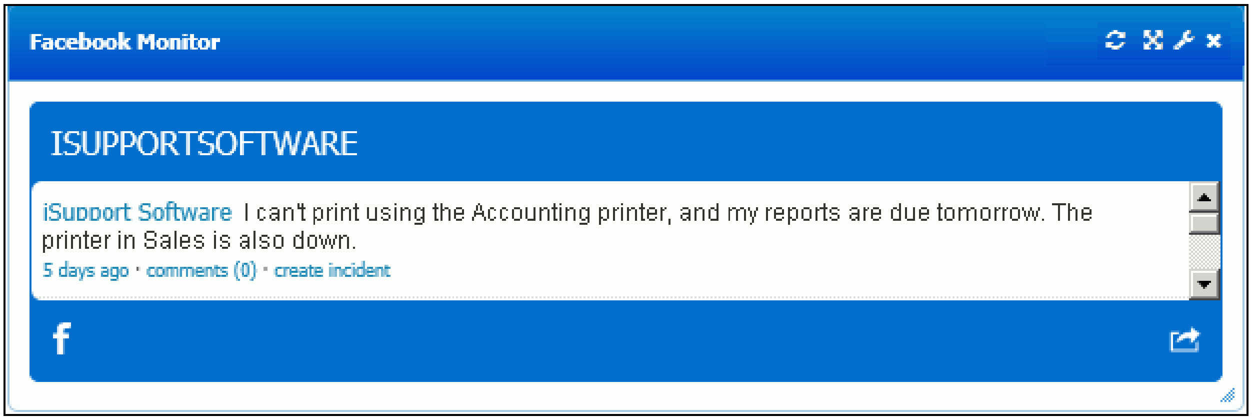
Facebook Applications

Configure a Facebook application to enable:

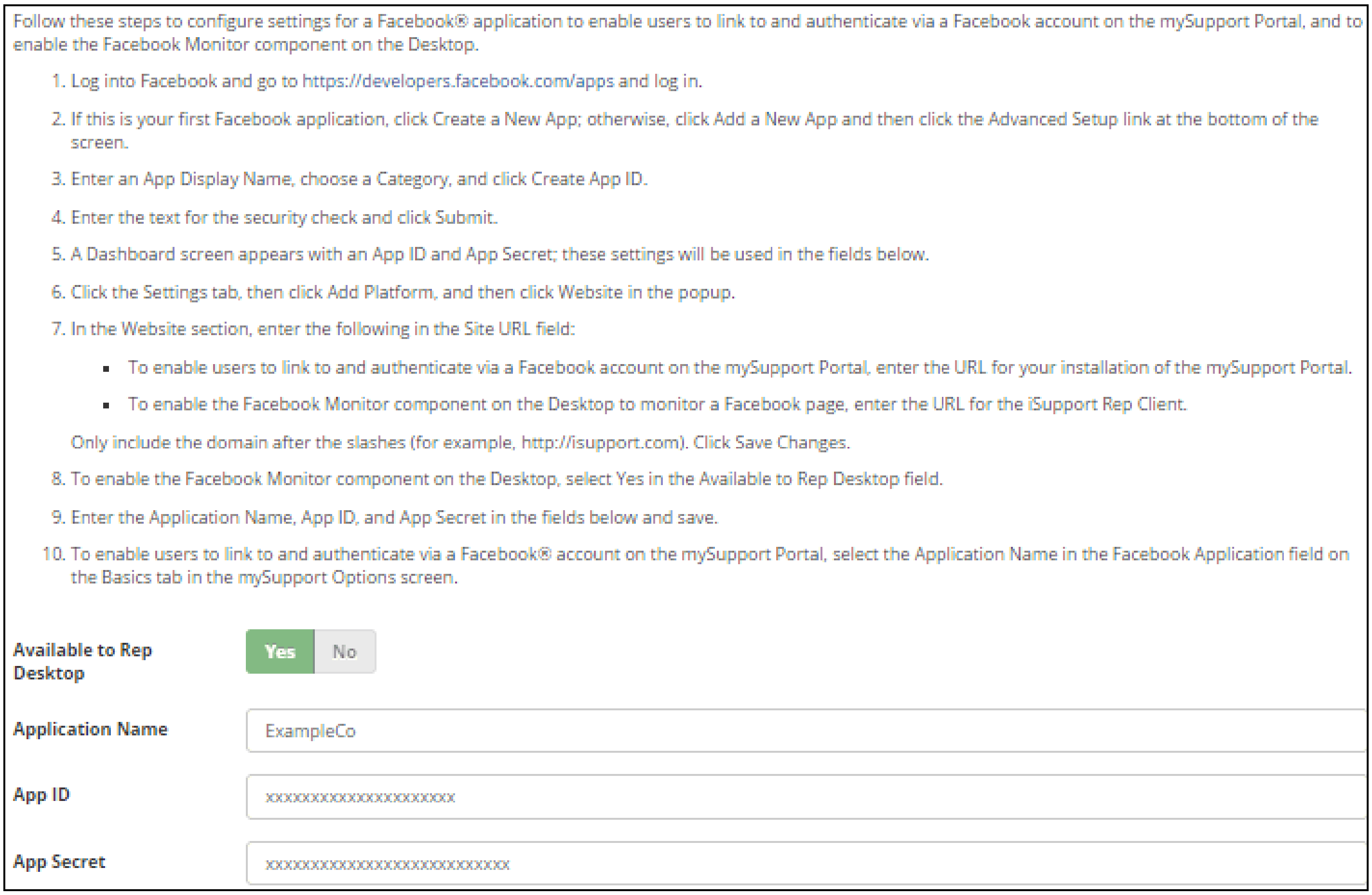
- Customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via Facebook; if the customer is logged into Facebook, the customer will not need to enter an iSupport login.



- The Facebook Monitor component on the Desktop to monitor a Facebook page and display posts and comments from it. It includes an option to create an incident from a listed post or reply. If the customer’s Facebook email address exists for a customer in Customer Profiles, the matching Customer Profile record will be used; otherwise, a new Customer Profile record will be created with the customer’s email address in the format of <*Facebook username*>@facebook.com. A reply will be posted to Facebook with the incident number and a link to the incident; if the Facebook application doesn't have permission to do this, an email will be sent to the customer's Facebook email account.



Follow the steps on the Facebook Applications tab in the Options and Tools | Integrate | Social Media Integration screen to configure a Facebook application.



Follow these steps to configure settings for a Facebook® application to enable users to link to and authenticate via a Facebook account on the mySupport Portal, and to enable the Facebook Monitor component on the Desktop.

1. Log into Facebook and go to https://developers.facebook.com/apps and log in.
2. If this is your first Facebook application, click Create a New App; otherwise, click Add a New App and then click the Advanced Setup link at the bottom of the screen.
3. Enter an App Display Name, choose a Category, and click Create App ID.
4. Enter the text for the security check and click Submit.
5. A Dashboard screen appears with an App ID and App Secret; these settings will be used in the fields below.
6. Click the Settings tab, then click Add Platform, and then click Website in the popup.
7. In the Website section, enter the following in the Site URL field:
   - To enable users to link to and authenticate via a Facebook account on the mySupport Portal, enter the URL for your installation of the mySupport Portal.
   - To enable the Facebook Monitor component on the Desktop to monitor a Facebook page, enter the URL for the iSupport Rep Client.

   Only include the domain after the slashes (for example, http://isupport.com). Click Save Changes.
8. To enable the Facebook Monitor component on the Desktop, select Yes in the Available to Rep Desktop field.
9. Enter the Application Name, App ID, and App Secret in the fields below and save.
10. To enable users to link to and authenticate via a Facebook® account on the mySupport Portal, select the Application Name in the Facebook Application field on the Basics tab in the mySupport Options screen.

Available to Rep Desktop	Yes No
Application Name	ExampleCo
App ID	xxxxxxxxxxxxxxxxxxxxx
App Secret	xxxxxxxxxxxxxxxxxxxxxxxxxxx

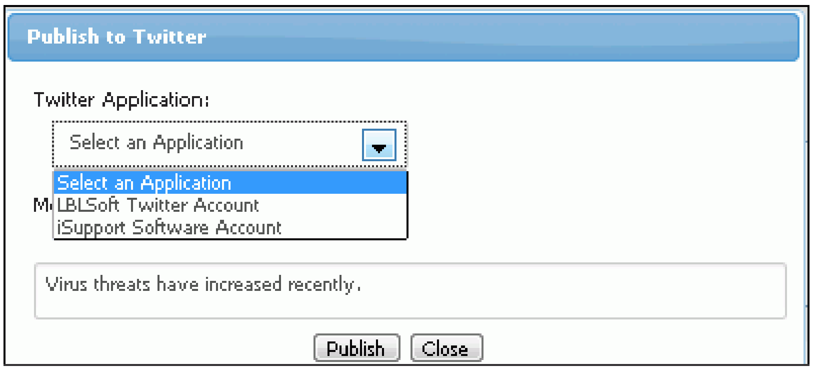
After completing the Application Name, App ID, and App Secret fields:

- To enable the Facebook Monitor component on the Desktop to monitor a Facebook page, select Yes in the Available to Rep Desktop field.
- To enable "Facebook" to display in the Add a New Linked Account dropdown in the Linked Accounts section in the mySupport Account Settings dialog, select the application name in the Core Settings | mySupport | mySupport Portals | Options screen.

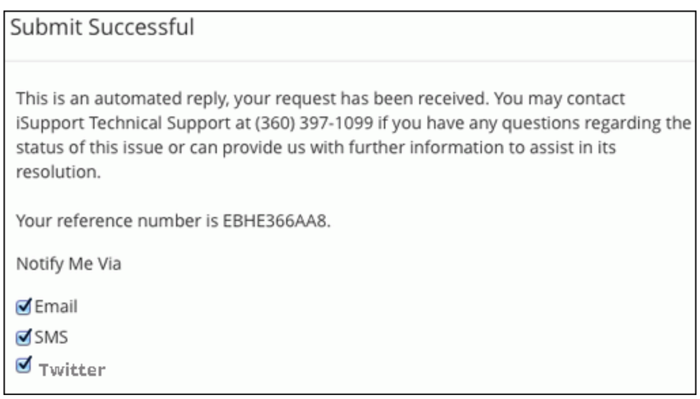
Twitter Applications

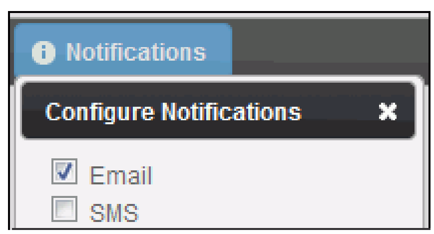
A Twitter account and application must be configured in iSupport in order to use the following features. To get started with creating a Twitter application, see "Configuring a Twitter Application" on page 42.

- Use the Twitter component display a Twitter feed for a specified Twitter username.
- Use the Twitter Monitor component to search Twitter feeds and display tweets that include a specified search term. You can use the Reply link to reply to tweets directly from iSupport, or use the Create Incident link to create an incident and send a reply to the Twitter user (via a Twitter direct message) with their incident number included. The tweet will be included in the Description field in the incident, and if the Twitter username exists for a customer in Customer Profiles, the matching Customer Profile record will be used. If the Twitter username does not exist for a customer, a new Customer Profile record will be created in the format of <*Twitter username*>@twitter.com.
- Support representatives can publish headlines and problems via Twitter. The Twitter icon will appear in the Headline and Problem screens if the support representative has the Publish to Twitter permission; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines) or the short description (for problems). If multiple Twitter applications have been created, the user can select the account to which the headline or problem should be published.

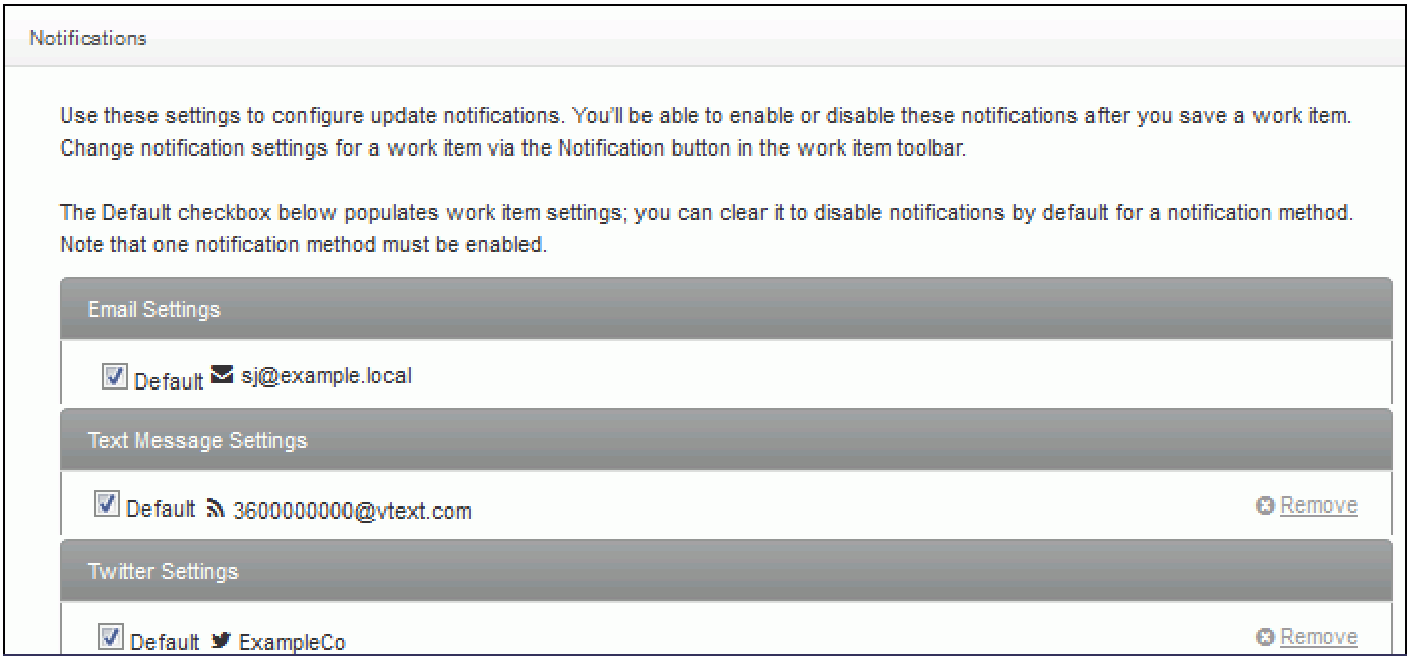


- Customers can use the Notifications section in the mySupport Account Settings dialog to enable a notification to be sent via Twitter direct message whenever when a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests). As shown in the dialogs below, customers can enable or disable notifications for a work item after saving, and change notification settings for an existing work item via the Notification button in the work item toolbar.



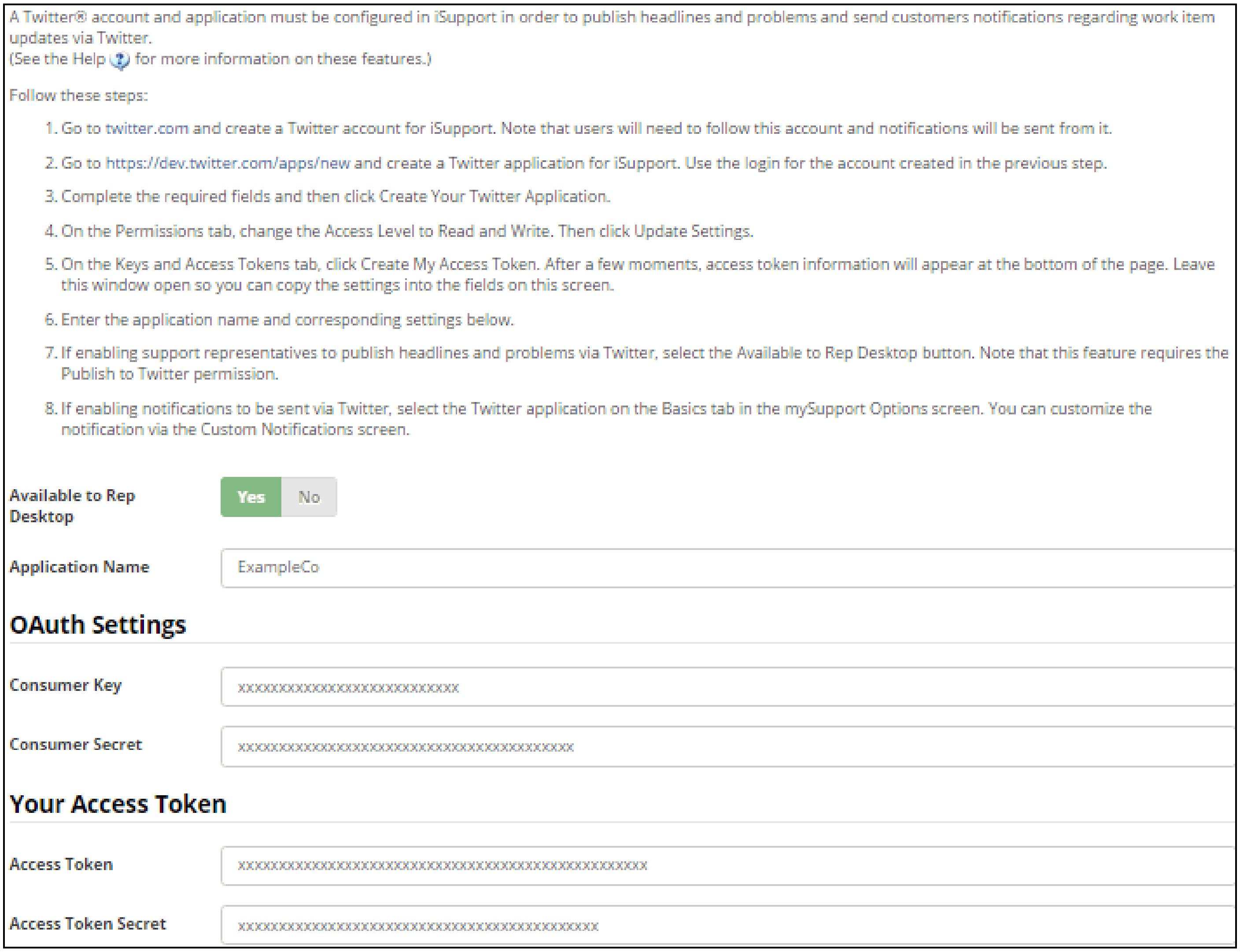


Customers configure the Twitter account to which the notification should be sent in the Notifications settings. The user needs to be following the account associated with the Twitter application specified in configuration; this account will be listed in the dialog prompting for the activation code.



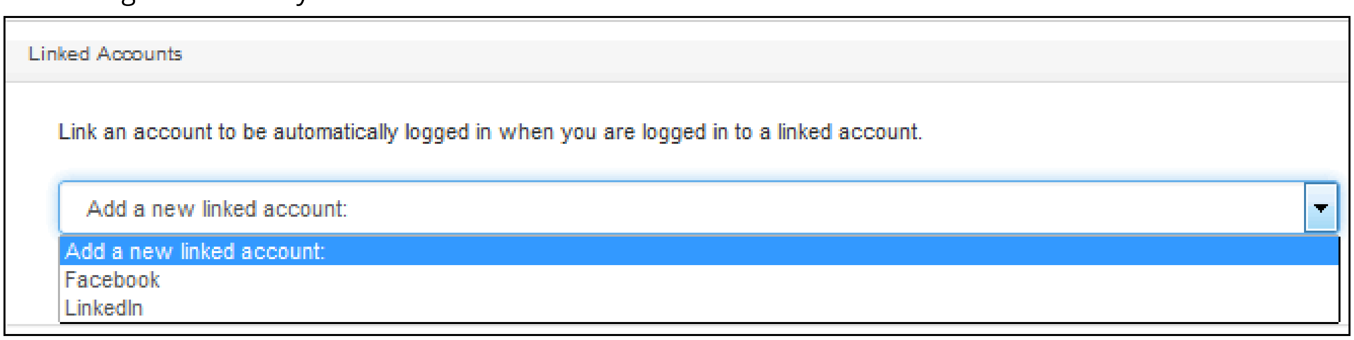
Configuring a Twitter Application

Follow the steps on the Twitter Applications tab in the Options and Tools | Integrate | Social Media Integration screen to create a Twitter account and application; use the Available to Rep Desktop button to enable an account to be published to Twitter. To enable the application to be used for update notifications sent to customers via the mySupport portal, select the application name in the Core Settings | mySupport | mySupport Portals | Options screen.

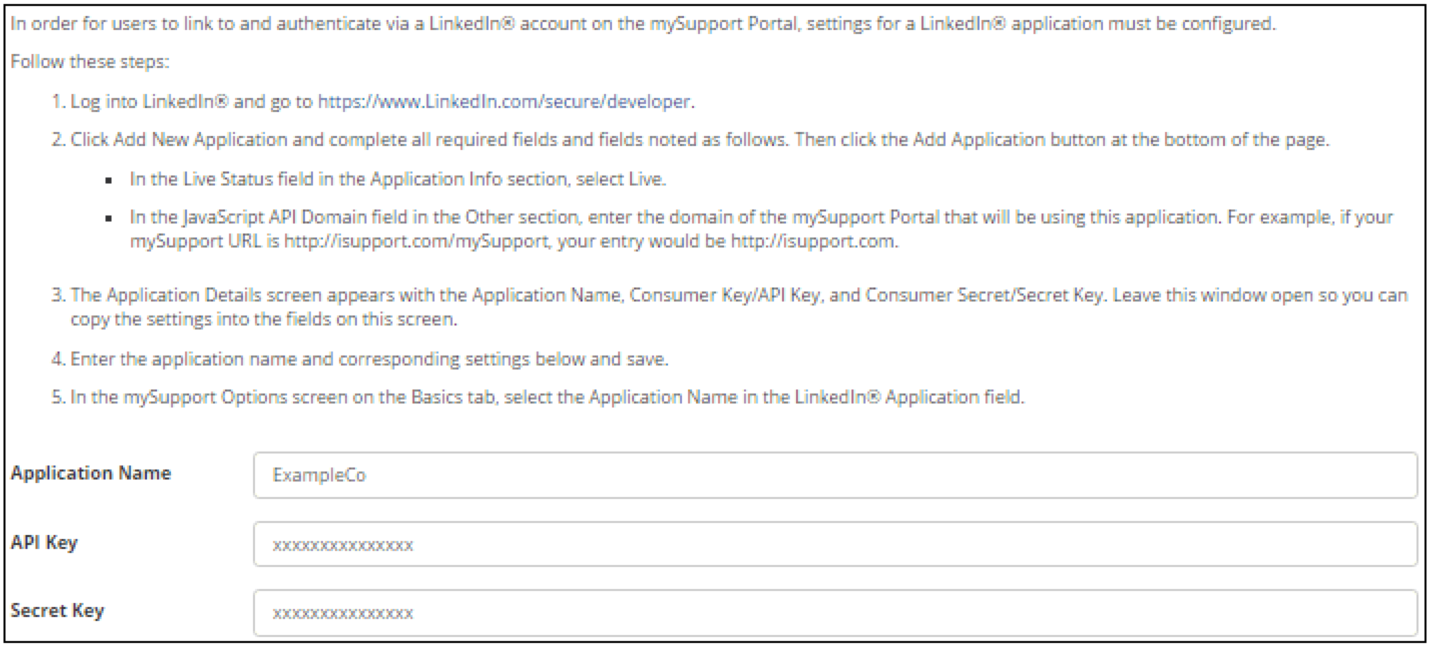


LinkedIn Applications

Customers can use the Linked Accounts section in the mySupport Account Settings dialog to link an account for authenticating automatically via LinkedIn.



Follow the steps in the screen to configure a LinkedIn application, and then select the application name in the Core Settings | mySupport | mySupport Portals | Options screen to enable "LinkedIn" to display in the Add a New Linked Account dropdown in the Linked Accounts section in the mySupport Account Settings dialog.



In order for users to link to and authenticate via a LinkedIn® account on the mySupport Portal, settings for a LinkedIn® application must be configured.

Follow these steps:

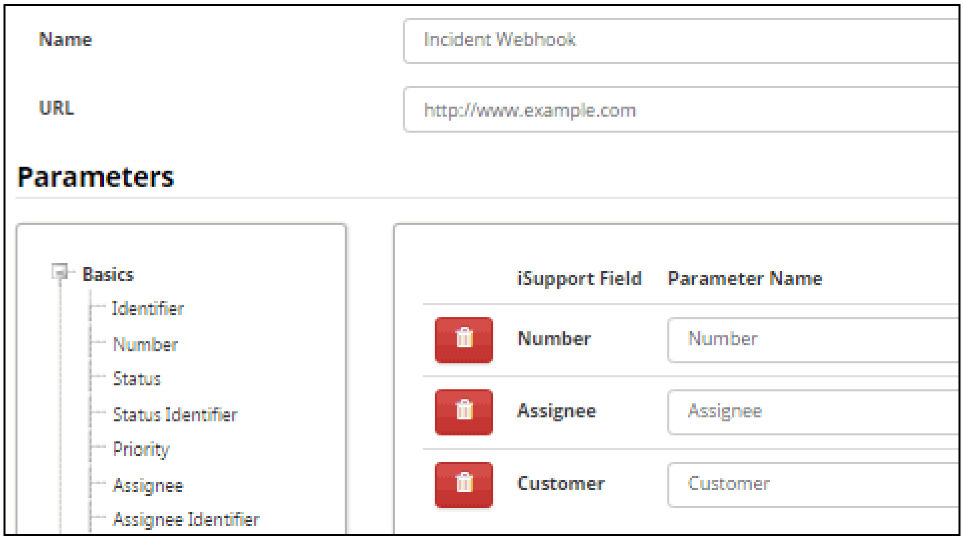
1. Log into LinkedIn® and go to https://www.LinkedIn.com/secure/developer.
2. Click Add New Application and complete all required fields and fields noted as follows. Then click the Add Application button at the bottom of the page.
   - In the Live Status field in the Application Info section, select Live.
   - In the JavaScript API Domain field in the Other section, enter the domain of the mySupport Portal that will be using this application. For example, if your mySupport URL is http://isupport.com/mySupport, your entry would be http://isupport.com.
3. The Application Details screen appears with the Application Name, Consumer Key/API Key, and Consumer Secret/Secret Key. Leave this window open so you can copy the settings into the fields on this screen.
4. Enter the application name and corresponding settings below and save.
5. In the mySupport Options screen on the Basics tab, select the Application Name in the LinkedIn® Application field.

Application Name	ExampleCo
API Key	xxxxxxxxxxxxxxx
Secret Key	xxxxxxxxxxxxxxx

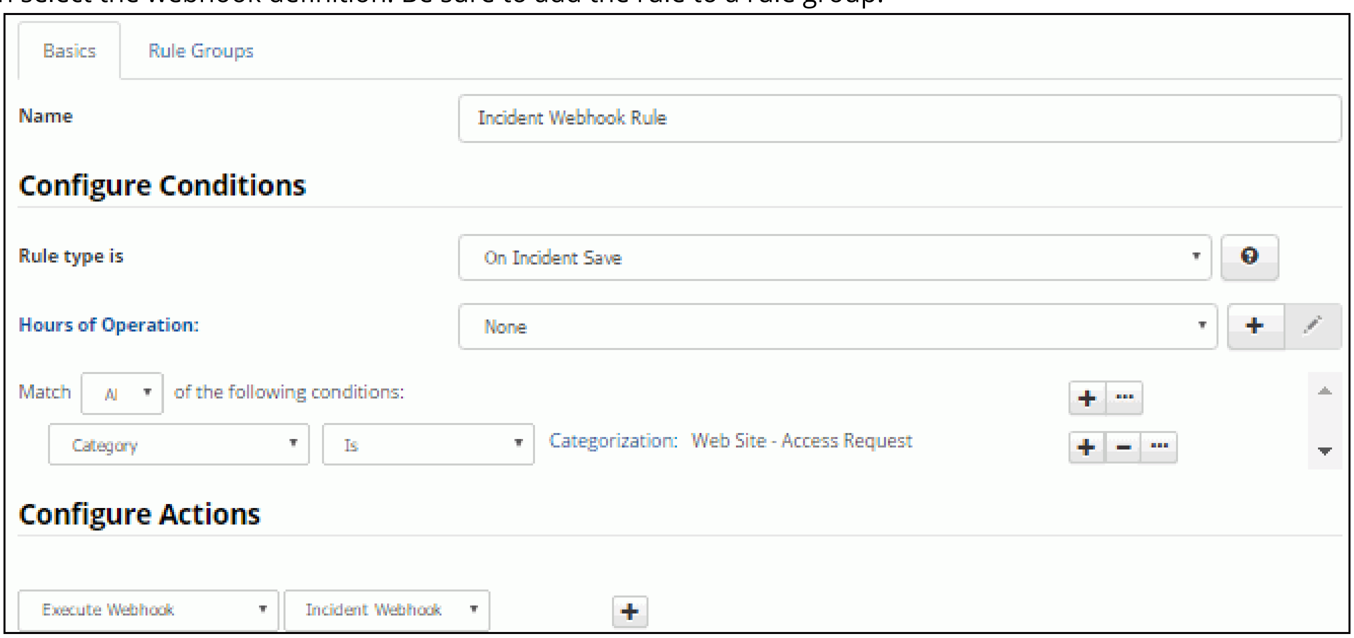
Configuring Webhooks

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.



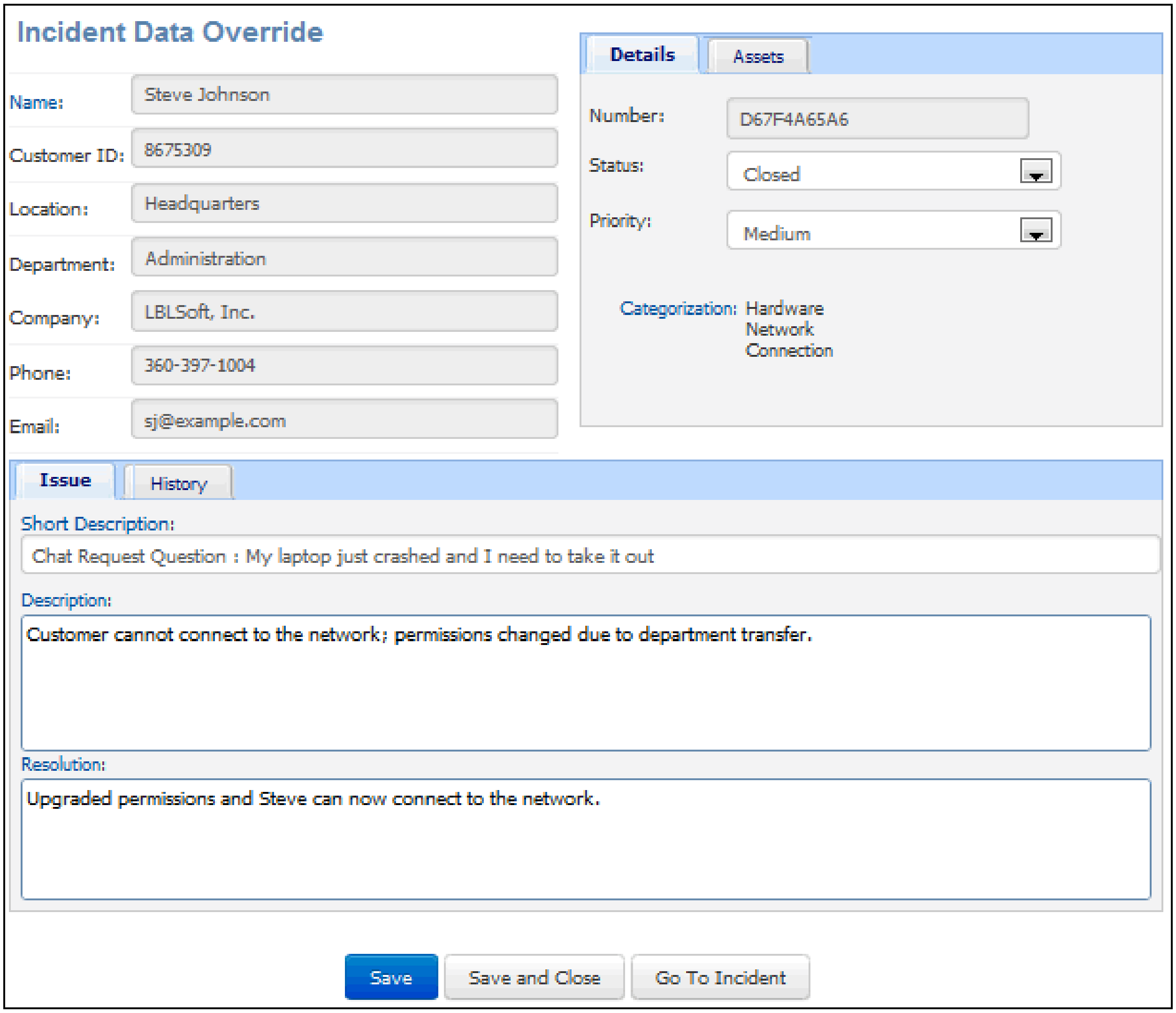
Use the applicable Rule screen to configure the conditions and time frame on which the post action will occur. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition. Be sure to add the rule to a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



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

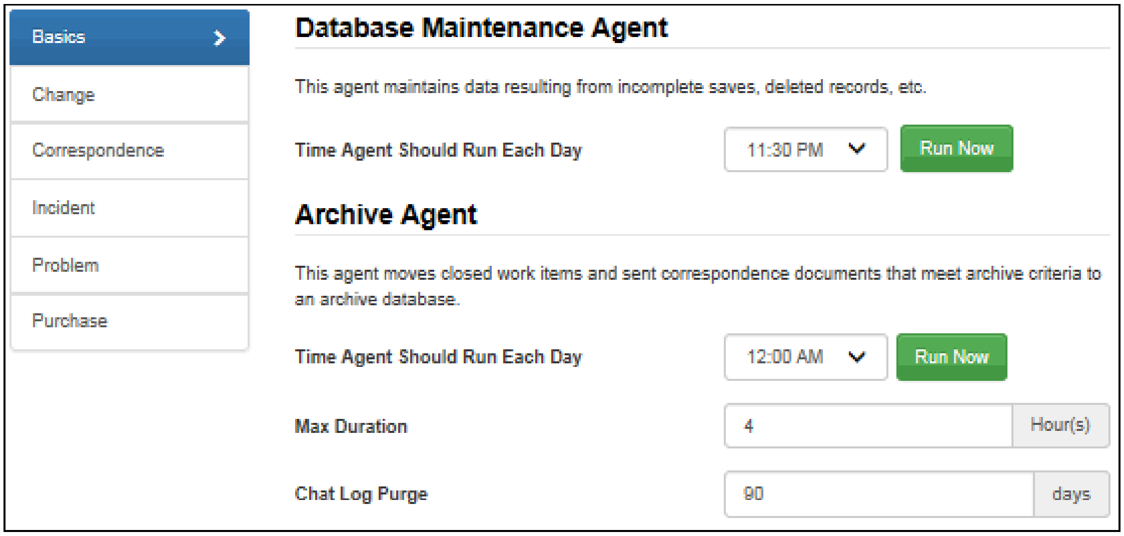
Use the Options and Tools | Administer | Data Override feature to overwrite fields on any saved incident, problem, or change. When a change is made using this feature, it will be logged in the Audit History field and notifications will be suppressed. If an approval cycle is in effect and the status is 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.

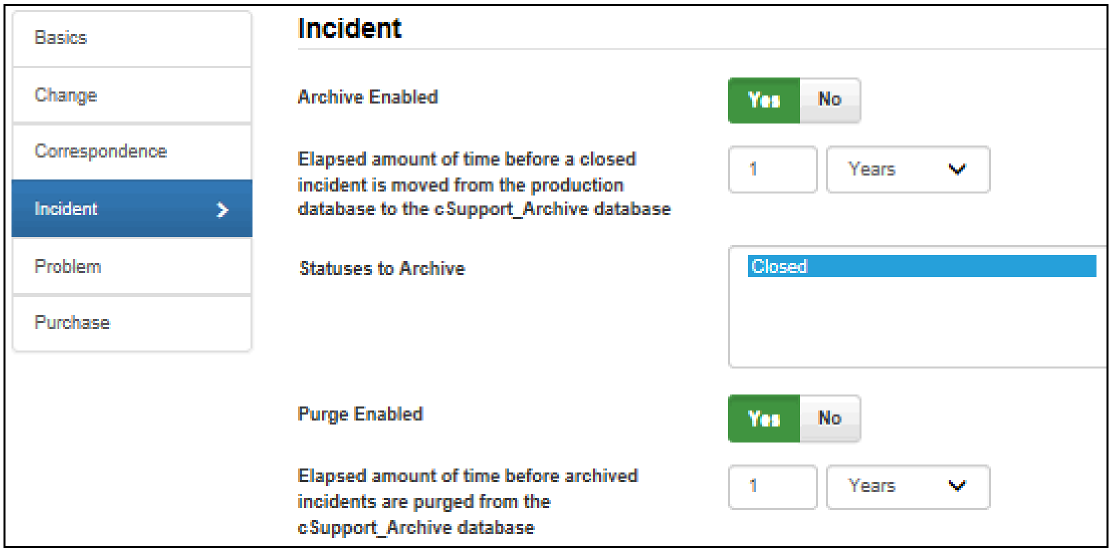
Archiving

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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