



Configuring iSupport Purchasing Functionality

Purchasing functionality is included if you have the Service Desk edition. Use it to track products and services, submit purchase requests, and associate orders with service requests and incidents, problems, changes, and assets.

Configuration Overview

Basic Configuration

- Enable Purchasing functionality and **set basic Purchasing options** via the Core Settings | Feature Basics screen. See [“Setting Purchasing Basics Configuration Options” on page 4](#) for more information. Note that Purchasing functionality can only be enabled if Asset functionality is enabled, because purchase requests use predefined asset types with associated vendors and products.
 - Create **asset types** (for example, printers, consulting services, or office supplies) for products via the Core Settings | Feature Basics screen. See [“Configuring Asset Types” on page 7](#).
 - Designate **product vendors**, which can be customers, companies, or support representatives (providing services, for example). You can:
 - Designate customers and companies as vendors via the Vendor checkbox in the Customer or Company Profile screen (accessed via the iSupport Desktop). Once this checkbox is selected, the Vendor Products section appears at the bottom of the screen for associating Product records later. (You can associate a vendor in the Product screen as well.)
 - Designate support representatives as vendors via the Core Settings | Support Representative Profile screen.
- See the online help for more information.
- Use the Product screen (accessed via the Desktop) to **create Product records** with predefined asset types and associated vendors. See the online help for more information.
 - **Associate products with vendors** in the Product, Customer Profile, and Company screens (accessed via the Desktop) and the Core Settings | Support Representative Profiles screen. See the online help for more information.
 - Configure submission and display of Purchase records in **mySupport** via the Core Settings | mySupport | Portals screen. Use the Customer Profile screen (accessed via the Desktop) to enable access and mySupport purchase request settings for customers. See the online help for more information.

Optional Customization

Use the following options under Options and Tools | Customize:

- Create customized labels for the Purchasing **status levels** of Open and Closed via the Custom Status Labels screen. See [“Defining Custom Status Labels” on page 21](#).
- Set up **custom fields** to include in the Purchase Request screen via the Custom Fields screen. See [“Configuring Custom Fields” on page 16](#).
- iSupport includes a default Purchase Request **screen layout**; use the Layouts screen to redesign it to include fields and tabs that are specific to your company. See [“Configuring Screen Layouts” on page 22](#).

Optional Integration

- **Import** Product data from a Microsoft Excel 2003 file via the Options and Tools | Integrate | Vendor Product Import screen. See ["Importing Products for a Vendor" on page 14](#) for more information.

Optional Automation

Use the following options under Options and Tools | Automate:

- Create **templates** to populate fields for common and reoccurring purchase requests via the Templates screen; see ["Configuring Purchase Request Templates" on page 28](#) for more information.
- Configure **rules** to send notifications, initiate approvals and web hooks, change field values, and more via the Rules screen. See ["Configuring Rules and Rule Groups for Purchasing" on page 38](#).
- Configure **approval cycles** and associated notifications via the Approval Cycles screen. See ["Configuring Approval Cycles" on page 31](#).
 - Associate approval cycles with customers and companies in the Customer Profile and Company Profile entry screens (accessed via the Desktop menu).
 - To enable support representatives to override an approval (specify a verdict) if not designated as an approver for the cycle in effect, go to Core Settings | Support Representative Profiles.

Administration

- **Archive** purchases for database efficiency via the Options and Tools | Administer | Archiving and Database Maintenance screen. See ["Archiving and Database Maintenance" on page 51](#).

The Purchase Request Screen

A purchase request becomes a purchase order after it has been saved or approved (if applicable). Only the received quantity can be changed by support representatives with no Edit permission. When the expected quantity for all line items has been received, the order can be closed. Closed orders cannot be reopened or edited; at any time, a support representative can set the status to a Closed status even if some items have not been received. Asset records can be created for the total quantity if all of the expected quantity for a line item is received.

Count tracking can be enabled for asset types; if a Product record with a count-enabled Asset type is selected on a purchase request and Asset Create checkbox is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Purchase

NewView

SaveSave and ClosePrintDelete

Font SizeCounters

Work HistoryAdd AssetUse TemplateAd Hoc Approval

PreviousNext

FileDisplayActionsNavigation

Recipient

Steve Johnson

Number

F4E945291A

Rule Group

Default Purchase Rule Group

Requested By

Steve Johnson

Status

Open

Cost Center

Accounting

Bill To

Steve Johnson

Request Number

8875309

Job Function

Manager

Author

Barry White

Opened

4/14/2015 8:34:18 AM

DetailsHistoryCustomAttachmentsAssociated Work ItemsAssets

Short Description

Request for Apple Laptop

Comments

Please call vendor to rush shipment.

Line Items

Laptop

Stuart Copeland (Rep)

Technology PCS (Company)

Office Supplies

Printer

Toggle Product Treeview

Asset Type	Vendor	Product	Comments	Delivery	Expected	Quantity	Rate	Amount	Asset Create
Laptop	Technology PCS	Apple Laptop	Edit		4/23/2015	0 of 1	900.00	\$900.00	<input checked="" type="checkbox"/>

Setting Purchasing Basics Configuration Options

The Purchasing Basics screen enables you to set basic options such as defaults and history options.



Completing the Basics Tab

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

The screenshot shows the 'Basics' configuration tab with the following options:




- Enable Work Type on Work History Dialogs**: Yes (selected) / No
- Default Work Type**: Service (dropdown) with Create New (+) and View/Edit (pencil) icons.
- Enable Work Start and Stop Dates on Work History Dialogs**: Yes (selected) / No
- Display Work History and Time Worked Prompt on Purchase Save**: Yes (selected) / No
- Require Time Worked in Work History for Purchase**: Yes (selected) / No
- Include Customer Work History**: Yes (selected) / No
- Include Work History Notes in Customer Work History Dialog**:
 - ☐ Do Not Include
 - ☐ Automatically Include
 - ☒ Include With Support Rep. Review
- Default Status**: Open (dropdown) with Create New (+) and View/Edit (pencil) icons.
- Default Closed Status When All Items Received**: Closed (dropdown) with Create New (+) and View/Edit (pencil) icons.
- Allow Approvers to Edit During Approval Cycle**: Yes (selected) / No
- Default Correspondence Template**: Purchasing Cover Letter (dropdown) with Create New (+) and View/Edit (pencil) icons.

Enable Work Type on Work History Dialogs - Select Yes to include a Work Type field in the Work History dialog in the Purchase Request 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 27](#).

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 Purchase Save dialogs in the Purchase Request 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 purchase request 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).

Display Work History and Time Worked Prompt on Purchase Save - Select Yes to display the Save dialog every time a support representative saves a purchase request.

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

Include Customer Work History - Select Yes to include a field on the Purchase Request screen that includes work history notes for display when customers view their purchase requests/orders on the mySupport portal. The field will include basic purchasing events, and can include:

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



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

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

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

Default Closed Status When All Items Received - Select the Closed status to assign to purchase orders when the quantity received (before the slash in the Quantity field) is equal to the expected quantity (after the slash in the Quantity field).

Allow Approvers to Edit During Approval Cycle - Select Yes to enable support representatives designated as approvers (or those with Approval Override) to have access to all functionality except Status in records in an approval cycle. You can configure the Pending Purchase Updated notification to be sent when the Edited During Approvals event occurs via the Rules screen.

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

Configuring Asset Types

Use asset types to classify similar assets (for example, printers and laptops). To access the Asset Type screen, select Asset Types and click the Create link. Use the Basics tab to set up asset types, enter a login for running asset scans, and set up optional and custom fields.

Basics	Asset Type Name	Laptop
Custom Fields	Layout	Default
Maintenance/Warranty	Enable Count Tracking	On Off
Notifications	Enable Scanning	On Off
	Default User Name for Dynamic Scanning	Administrator
	Default Password for Dynamic Scanning	Reset
	Default SNMP Community String for Dynamic Scanning	public
	Optional Fields	<div><div><input checked="" type="checkbox"/> Owner</div><div><input checked="" type="checkbox"/> Model</div><div><input checked="" type="checkbox"/> Tag Number</div><div><input checked="" type="checkbox"/> Purchase Date</div><div><input checked="" type="checkbox"/> Location</div><div><input checked="" type="checkbox"/> Manufacturer</div><div><input checked="" type="checkbox"/> Serial Number</div><div><input checked="" type="checkbox"/> Comments</div></div>

Asset Type Name - Enter the name of the asset type. Asset types classify similar assets and enable custom and optional fields to display when recording information about an asset.

Layout - Select the layout containing the fields and tabs that will display when the type is selected in the Asset screen. Asset layouts are configured in the Asset Layouts configuration screen; see ["Configuring Screen Layouts" on page 22](#) for more information. If None is selected in this field, the layout designated as default in the Asset Layouts screen will be used when an Asset record of this type is created.

Enable Count Tracking - Select Yes to enable Unit Count, Unit Label, Unit Cost, and Unit List Price fields to appear in the Asset screen if the type is selected and send a Low Unit Count notification if applicable. The Low Unit Count notification is configured on the Notifications tab.

<div>Basics ></div> <div>Custom Fields</div> <div>Maintenance/Warranty</div> <div>Notifications</div>	Asset Type Name	Memory Upgrade
	Layout	Default ▼ + ✎
	Enable Count Tracking	On Off
	Who to Notify of Low Unit Count	<input type="checkbox"/> Owner <input checked="" type="checkbox"/> Other
	Email Addresses of Other Recipients	sj@example.local
	Number of Units Remaining to Send Notification	2.00
	Enable Scanning	On Off
	Optional Fields	<input type="checkbox"/> Owner <input type="checkbox"/> Location <input type="checkbox"/> Model <input type="checkbox"/> Manufacturer

The Unit Count, Unit Label, Unit Cost, and Unit List Price fields will be included in the Asset screen if the type is selected.

Unit Count	20.00
Unit Label	Stick
Unit List Price	\$100.00
Unit Cost	\$50.00

When an asset with the specified type is selected in the Incident, Problem, or Change screen, a support representative with the Edit Used Count permission can click the Update Unit Counts link, enter the number of units used, and decrement the unit count.

If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Who to Notify of Low Unit Count/Email Addresses of Other Recipients - If enabling count tracking, select the person to whom the Low Unit Count notification should be sent:

- Select Owner to send the email to the owner assigned to the asset (in the Asset entry screen). The notification will contain asset details (for example, the name, type, and expiration date.)
- Select Other to send the email to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the Asset record.

Be sure to enable the Asset Item Inventory Tracking agent in the Asset Agents screen; it checks unit counts and send notifications when the minimum is reached.

Number of Units Remaining to Send Notification - Enter the count (of total units remaining) at which the low unit count notification should be sent.

Enable Scanning - Select Yes if asset scans will be performed on assets assigned this asset type. Asset scans can be performed on non-Windows SNMP-enabled devices in your network, computers with Windows 98 and above, or any other WMI-compliant machine (WMI must be installed and active).

Default User Name for Dynamic Scanning/Default Password for Dynamic Scanning - If asset scans are enabled, enter the user name and password to be used for accessing the machine to be scanned. This login will be validated by the WMI process of the target machine in order to return the requested data. Traditionally, the login must be a member of the Administrators group of the machine to be scanned, but permissions may be modified to a different structure.

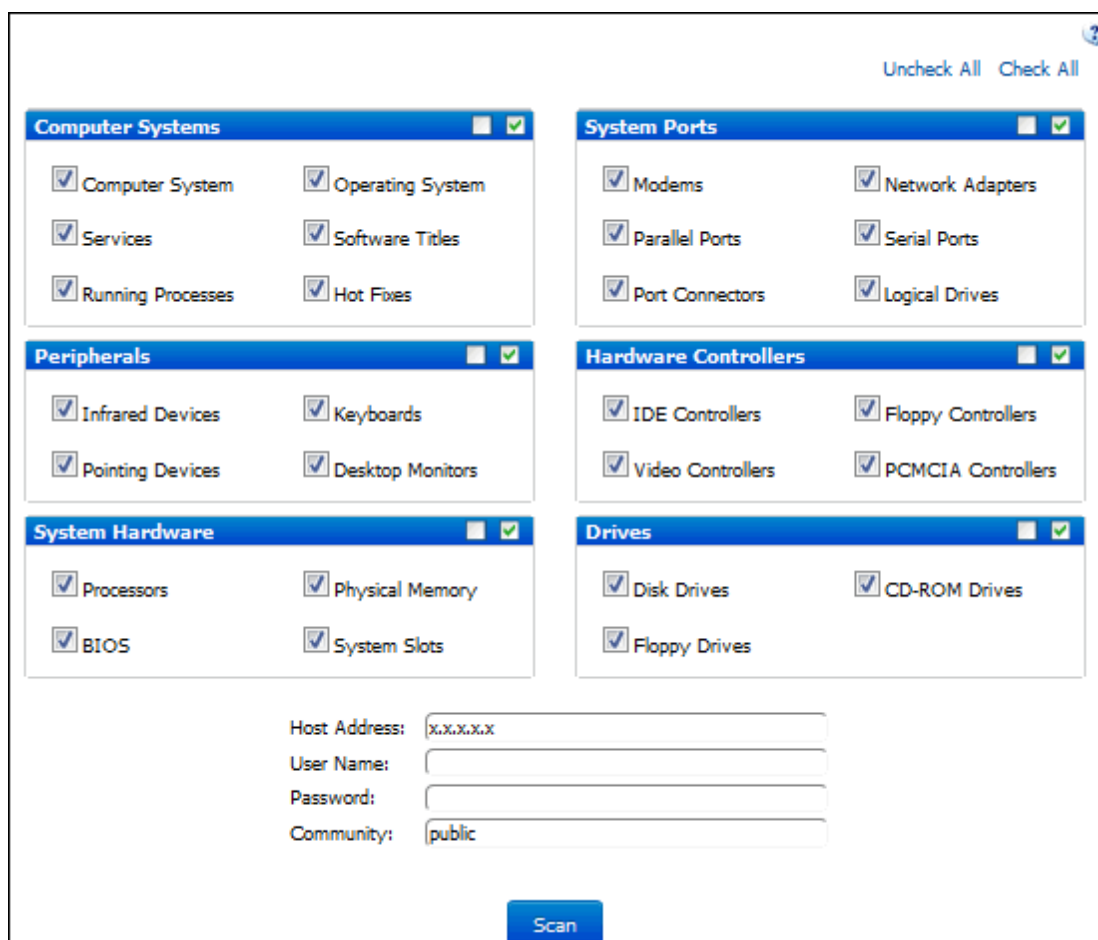
When a dynamic scan is initiated, the Dynamic Asset Scan dialog appears as shown below. If you have set up a default user name and password for the selected asset type, the support representative can select Yes in the Use Default Credentials checkbox to use this default user name and password.

If No is selected in the Use Default Credentials field, the User Name and Password fields will be enabled for entering a login.

Default SNMP Community String for Dynamic Scanning - If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device). Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".

Note: If a login is used to access a Microsoft Windows XP machine, a profile and a folder are created in the Documents and Settings folder.

The Dynamic Asset Scan dialog is shown below; it appears when a dynamic scan is initiated in the Asset or Incident screen.



The image shows a screenshot of the 'Dynamic Asset Scan' dialog box. At the top right, there are links for 'Uncheck All' and 'Check All'. The dialog is divided into six sections, each with a title bar and a list of items with checkboxes:

- Computer Systems**: Computer System, Operating System, Services, Software Titles, Running Processes, Hot Fixes.
- System Ports**: Modems, Network Adapters, Parallel Ports, Serial Ports, Port Connectors, Logical Drives.
- Peripherals**: Infrared Devices, Keyboards, Pointing Devices, Desktop Monitors.
- Hardware Controllers**: IDE Controllers, Floppy Controllers, Video Controllers, PCMCIA Controllers.
- System Hardware**: Processors, Physical Memory, BIOS, System Slots.
- Drives**: Disk Drives, CD-ROM Drives, Floppy Drives.

Below these sections are four input fields: 'Host Address' (with a placeholder 'x.x.x.x.x'), 'User Name', 'Password', and 'Community' (with the value 'public'). At the bottom center is a blue 'Scan' button.

Note: If a login is used to access a Microsoft Windows XP machine, a profile and a folder are created in the Documents and Settings folder.

Entering Optional and Custom Fields

You can set up custom fields and optional fields such as Owner, Tag Number, and Location to display in the Asset screen when the asset type is selected.

In the **Optional Fields** section, select the checkbox next to each field that should display when the asset type is selected in the Asset screen.

In the **Custom Fields** section, click the Add link to set up a custom field that will display in the Custom Fields section when the asset type is selected in the Asset screen.

Basics	Row	1
Conditional Display Options	Label	Service Date
	Tooltip	Date of service
	Required	<input type="radio"/> On <input checked="" type="radio"/> Off
	Type	Date Field
	Default Value	

Configuring Maintenance and Warranty Tracking

Use the Maintenance/Warranty tab to set up tracking of maintenance and warranty expiration dates. Expiration notifications are enabled on the Notifications tab. Be sure to enable the Asset Reminder agent on the Asset tab in the Asset Agents screen; see [“Scheduling and Running Asset Agents” on page 7](#).

The screenshot shows the 'Maintenance/Warranty' configuration interface. On the left, a sidebar contains links for 'Basics', 'Custom Fields', 'Maintenance/Warranty' (which is highlighted with a blue bar and a right-pointing arrow), and 'Notifications'. The main content area is split into two sections: 'Track Maintenance Information' and 'Track Warranty Information'. Each section features a toggle switch at the top right, currently set to 'On'. Below each toggle are checkboxes for 'Who to Notify of [Maintenance/Warranty] Expiration', with 'Owner' selected and 'Other' unselected. An 'Email Addresses of Other Recipients' text input field follows. Then, there are two numeric input fields: 'Number of Days After Asset Creation to Default [Maintenance/Warranty] Expiration Date' (set to 255) and 'Number of Days Prior to [Maintenance/Warranty] Expiration to Send Reminder' (set to 2).

Track Maintenance Information - Select Yes to enable maintenance notification functionality, which sends notifications when a maintenance expiration date is near.

Who to Notify of Maintenance Expiration/Email Addresses of Other Recipients - If tracking maintenance information, select the person to whom the maintenance expiration reminder email should be sent.

- Select Owner to send the maintenance reminder email to the owner assigned to the asset (in the Asset entry screen). The notification will contain asset details (for example, the name, type, and expiration date.)
- Select Other to send the maintenance expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the asset record.

Number of Days After Asset Creation to Default Maintenance Expiration Date - Enter the number of days after the asset record is created to display as default for the maintenance expiration date.

Number of Days Prior to Maintenance Expiration to Send Reminder - Enter the number of days before the expiration date in which the maintenance notification should be sent.

Track Warranty Information - Select Yes to enable warranty notification functionality, which sends notifications when a warranty expiration date is near.

Who to Notify of Warranty Expiration/Email Addresses of Other Recipients - If tracking warranty information, select the person to whom the warranty expiration reminder email should be sent.

- Select Owner to send the warranty reminder email to the owner assigned to the asset (in the Asset entry screen).
- Select Other to send the warranty expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person.

Number of Days After Asset Creation to Default Warranty Expiration Date - Enter the number of days after the asset record is created to display as default for the warranty expiration date.

Number of Days Prior to Warranty Expiration to Send Reminder - Enter the number of days before the expiration date in which the warranty notification should be sent.

Selecting Notifications for Asset Events

Use the fields on the Notifications tab in the Asset Types screen to select notifications and recipients for maintenance/warranty reminders. You can select the default notification or a predefined custom notification; select Create New Custom Notification to access the Custom Notifications screen to create one. Note that the recipients can include both support representatives and customers, and the default notification text is different for each.

The screenshot shows the 'Asset Types' screen with the 'Notifications' tab selected. The left sidebar contains tabs for 'Basics', 'Custom Fields', 'Maintenance/Warranty', and 'Notifications'. The main content area is titled 'Notification Event and Recipient Mapping'. It lists three notification events: 'Maintenance Expiration Reminder', 'Warranty Expiration Reminder', and 'Low Unit Count Notification'. For the 'Maintenance Expiration Reminder', the 'Owner' is set to 'iSupport Default' and the 'Other' is set to 'Create New Custom Notification'. The 'Warranty Expiration Reminder' and 'Low Unit Count Notification' events are currently set to 'iSupport Default'.

Maintenance Expiration Reminder - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty tab. The notifications will be sent on the schedule of the Asset Reminder agent.

Warranty Expiration Reminder - Select the recipients and notifications to be sent according to the settings on the Maintenance/Warranty tab. The notifications will be sent on the schedule of the Asset Reminder agent.

Low Unit Count Notification - Select the recipients and notifications to be sent according to the settings on the Basics tab. The notifications will be sent on the schedule of the Asset Item Inventory Tracking agent.

Scheduling Asset Agents

If maintenance or warranty expiration functionality is configured, schedule the Asset Reminder agent on the Agents tab.

The screenshot shows the 'Asset Reminder Agent' configuration screen. The title is 'Asset Reminder Agent'. Below the title is a description: 'This agent sends notifications to the individuals specified in the Asset Configuration screen, based on the specified number of days prior to the warranty or maintenance expiration date.' There are three buttons: 'Enable', 'Yes', and 'No'. The 'Enable' button is highlighted. Below the buttons is a field labeled 'Time Agent Should Run Each Day' with a dropdown menu showing '10:30 PM'.

Asset Reminder Agent/Time Agent Should Run Each Day - The Asset Reminder agent searches for warranty and maintenance expiration dates. If it is the specified number of days before the warranty or maintenance expiration date, it will send an email reminder to the individuals specified in the Asset record. Select Yes to enable the Asset Reminder agent. After selecting Yes, use the Time Agent Should Run Each Day field to select the time the agent should run.

If unit count tracking is configured for an asset type, go to Feature Basics and schedule the Asset Unit Count Tracking agent on the Asset Management tab.

Asset Unit Count Tracking Agent

This agent sends notifications to the individuals specified in the Asset Type Configuration screen based on the specified minimum threshold of remaining units.

Enable

Yes

No

Run Now

Time Agent Should Run Each Day

10:30 PM ▼

Asset Unit Count Tracking Agent - If count tracking is enabled for an asset type and the type is selected in the Asset screen, a count and low item threshold can be entered for an asset. The count can be decremented via entries in the Incident, Problem, and Change screens and notifications can be sent to the individuals specified in the Asset Type Configuration screen when the count reached the specified minimum number of remaining units. Select Yes to enable the agent to check unit counts and send notifications when the minimum is reached. After selecting Yes, use the Time Agent Should Run Each Day field to select the time the agent should run.

Importing Products for a Vendor

Use the Options and Tools | Integrate | Vendor Product Import screen to import Product data from a Microsoft Excel 2003 file. Note that this configuration option requires customers, companies, or support representatives designated as vendors, and you'll need Purchasing Author/Edit permissions in your Support Representative Profile record in order to use this feature.

Vendor Type

Support Representative

Vendor

Ron Deeter

File Name

Choose File

ProductListA-3.xls

Load

*The file used for importing data must be saved in the format of a Microsoft Excel® 2003 file.

Worksheet

Software

Vendor Source

iSupport Columns

Allow Decim

→

←



Mapped Columns

Name>Name
Types>Asset Type
Description>Description
Rate>Rate
SC>Available to mySupport

Name	Description	Rate	Asset Type	Available to mySupport
LINX VIP-E	LINX VIP-E	\$100.00	Annunciator - Software	<input checked="" type="checkbox"/>
LINX VIP	LINX VIP	\$100.00	Annunciator - Software	<input checked="" type="checkbox"/>


Preview

Import

- In the **Vendor Type** field, select the type of vendor: Company, Customer, or Support Representative. Then select the previously-defined company, customer, or support representative vendors to associate with the imported Product records.
- In the **File Name** field, select the Microsoft Excel 2003 .xls file containing the product information. Click the Load button to populate the Vendor Source column with the columns in the spreadsheet. The worksheets in the file appear in the Worksheet field; select the worksheet containing the data to import.
- Map the columns in the **Vendor Source list** to the columns in iSupport.
 - To map a column, select a column in the Vendor Source list and the corresponding column in the iSupport Columns list. Then click the right arrow  button. The associated fields display under Mapped Columns.
 - To remove an entry from the Mapped Columns list, select the entry and click the left arrow  button.
- Click the Preview button to display the mapped columns using data from the spreadsheet.

When finished, click the **Import** button to execute the import.

Configuring Cost Centers and Job Functions

Use the Purchasing Cost Centers and Job Functions screen to define cost centers and associated job functions for use in reporting. You can associate cost centers with customers and companies via the Customer Profile and Company screens, as well as the Associate Cost Center  icon on customer views on the Desktop.

If you wish to associate job functions with a cost center, first define the job functions by clicking the Create link on the Job Functions tab in the Purchasing Configuration screen.

Cost Centers

Job Functions >

CreateDelete

Name ▲

Manager

Use the Cost Centers tab to create a cost center and associate job functions if applicable. Click the Create link to display the Cost Center screen for entering the name, selecting the predefined job functions, and setting up associated custom fields to appear when the cost center is selected in the Purchase Request/Order screen.

Name

Accounting

Job Functions

☒ Manager

Custom Fields:

CreateDelete

<div></div>	Row ▲	Label	Type	Default Value	Required	Available to mySupport	Conditional Display
<div></div>	1	Expense Level	Text Box		No	Yes	No

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.

Basics >	Row	1
mySupport Access >	Label	Server OS
Conditional Display Options >	Tooltip	The operating system on the server.
	Required on Save	On Off
	Required on Close	On Off
	Type	Check Box
	Data Source	None +
	Options	Mac,Windows,Other ✓ ?
	Max Columns	2

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 19](#) 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.

Check Box	<input checked="" type="checkbox"/> Option 1 <input checked="" type="checkbox"/> Option 2 <input type="checkbox"/> Option 3	Date Field	<input type="text" value="03/08/2016"/>
Radio Button	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> I don't know	Date/Time Field	<input type="text" value="03/07/2016 3:27:00"/>
Text Area	<input type="text"/>	Single Selection Drop-Down	<input type="text" value="Option 1"/>
Text Field	<input type="text"/>	Multiple Selection List Box	<input type="text" value="Option 1"/> Option 2 Option 3
Currency Only	<input type="text" value="\$ 123"/>	Hyperlink	iSupport's Web Site - Edit
Number Only	<input type="text" value="123"/>		

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 19](#) 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.

The screenshot shows a configuration panel for 'mySupport Access Options'. On the left is a sidebar with three items: 'Basics', 'mySupport Access' (which is selected and highlighted in blue), and 'Conditional Display Options'. The main area contains the 'Available to mySupport' toggle, which is currently set to 'On' (green button). Below this is the 'Select mySupport portals with access' section, which includes a checked checkbox and a text input field containing 'http://example.com/user'.

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.

The screenshot shows the 'Conditional Display Options' configuration panel. The sidebar on the left has 'Conditional Display Options' selected. The main area features the 'Enable Conditional Display' toggle, which is set to 'On'. Below the toggle is a 'Match' dropdown menu set to 'All'. There are two search conditions defined: 'Department Code' is '300' and 'Budget Code' is '500'. Each condition has a dropdown menu, an 'is' operator, a text input field with the value, and a set of control buttons (+, -, and ...). There are also group control buttons (+ and ...) at the top right of the conditions area.

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.

Incident	Name	Asset Types
Problem	Connection String	server=.; database=cSupport; Trusted_Connection=True
Change	SQL Query	select Type from ASSET_TYPES
Customer		
Company		
Asset		
Purchase		
Service Contract		
Configuration Item		
Knowledge Entry		
Opportunity		
Advanced		
Data Sources >		
	Items	<div>Retrieve Items</div> <div>Cell Phone Copier Desktop Laptop Office Supplies Printer Server Tablet Training Widgets</div>
	Active	<div>Yes No</div>
	Synchronization Interval	<div>15 minute</div>

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.

Basics	Row	5
mySupport Access	Label	Affected Item
Conditional Display Options	Tooltip	
	Required on Save	On Off
	Required on Close	On Off
	Type	Multiple Selection List Box
	Data Source	Asset Types
	Options	<div><input type="checkbox"/> Cell Phone</div> <div><input type="checkbox"/> Copier</div> <div><input type="checkbox"/> Desktop</div> <div><input type="checkbox"/> Laptop</div> <div><input type="checkbox"/> Office Supplies</div>
	Max Rows	2

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.

Change	<div>CreateDelete</div>					
Company						
Configuration Item						
Incident >						
Problem						
Purchase						
Service Contract						

		Label	mySupport Label	Type	Position ▲
<input type="checkbox"/>		Customer Submitted	Submitted	Open ▼	7 ▼
<input type="checkbox"/>		Open	Open	Open	1
<input type="checkbox"/>		Closed	Closed	Closed	2
<input type="checkbox"/>		Suspended	Open	Suspended	3
<input type="checkbox"/>		Reopened	Open	Reopened	4
<input type="checkbox"/>		Scheduled	Scheduled	Scheduled	5
<input type="checkbox"/>		Dispatached	Dispatached	Open	6

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.

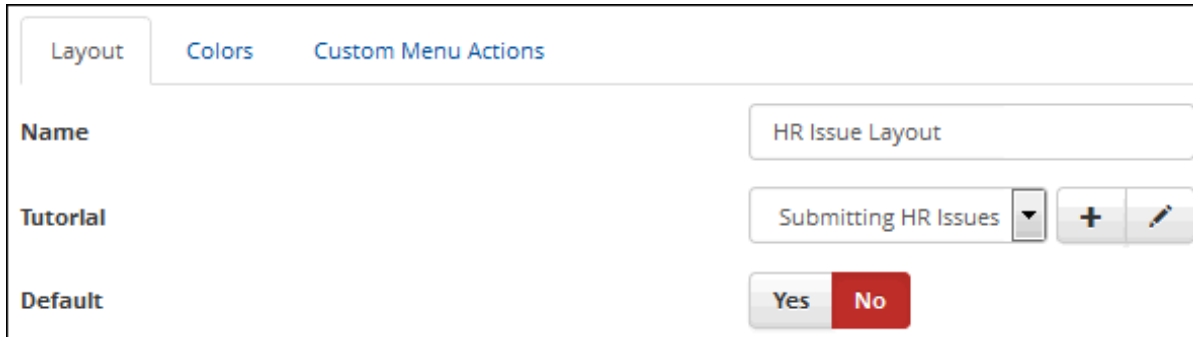
Type - Select the basis for the custom status label: Open, Suspended, Reopened, or Closed. Note: Since there can only be one Reopened status label, it will not be available for new status labels.

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 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.



Layout	Colors	Custom Menu Actions
Name	HR Issue Layout	
Tutorial	Submitting HR Issues	
Default	<input checked="" type="checkbox"/>	

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.

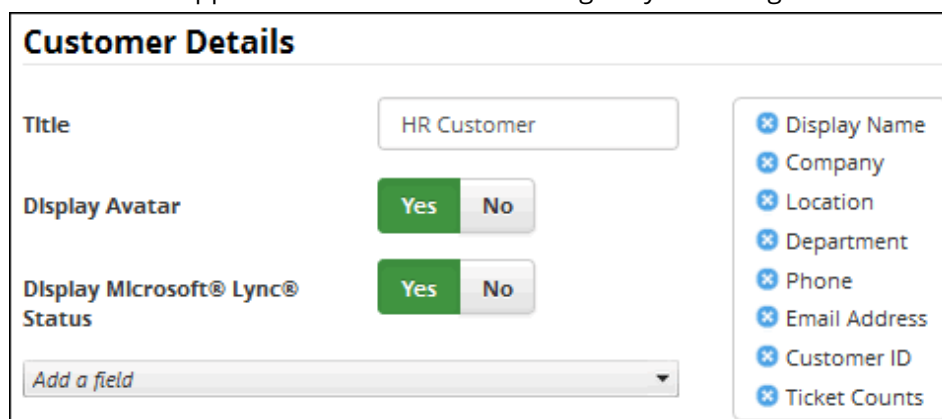
For Rep Client layouts, you can use the Preview button at the bottom of the Layout screen after adding required fields to the form to display your layout. You'll need to select a record to use for displaying field data.

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.



Customer Details	
Title	HR Customer
Display Avatar	<input checked="" type="checkbox"/>
Display Microsoft® Lync® Status	<input checked="" type="checkbox"/>
<input type="text" value="Add a field"/>	
<ul style="list-style-type: none"><input checked="" type="checkbox"/> Display Name<input checked="" type="checkbox"/> Company<input checked="" type="checkbox"/> Location<input checked="" type="checkbox"/> Department<input checked="" type="checkbox"/> Phone<input checked="" type="checkbox"/> Email Address<input checked="" type="checkbox"/> Customer ID<input checked="" type="checkbox"/> Ticket Counts	

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.

The screenshot shows the 'Incident' screen interface. At the top is a blue header bar with 'Incident' and 'View Tour' options. Below this is a toolbar with icons for 'Save', 'Save And Close', 'Print', 'Delete', 'Font Size', 'Add History', 'Categorize', 'Override Data', 'Route', 'Customer', and 'Templates'. The main content area is divided into two sections. On the left, under 'HR Customer', there is a profile for Steve Johnson (LBLSoft, Headquarters, Administration, 360-397-1004, sj@example.local, 8675309). Below the profile are 'Ticket Counts' for 17 Open, 0 Suspended, 0 Closed, and 0 Reopened tickets. On the right, there are fields for 'Status' (Open), 'Priority' (Low), 'Number' (F8JB546274), 'Assignee' (Stuart Copeland), 'Created Date' (8/19/2015 10:43:51 A), and 'Author' (Barry White).

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

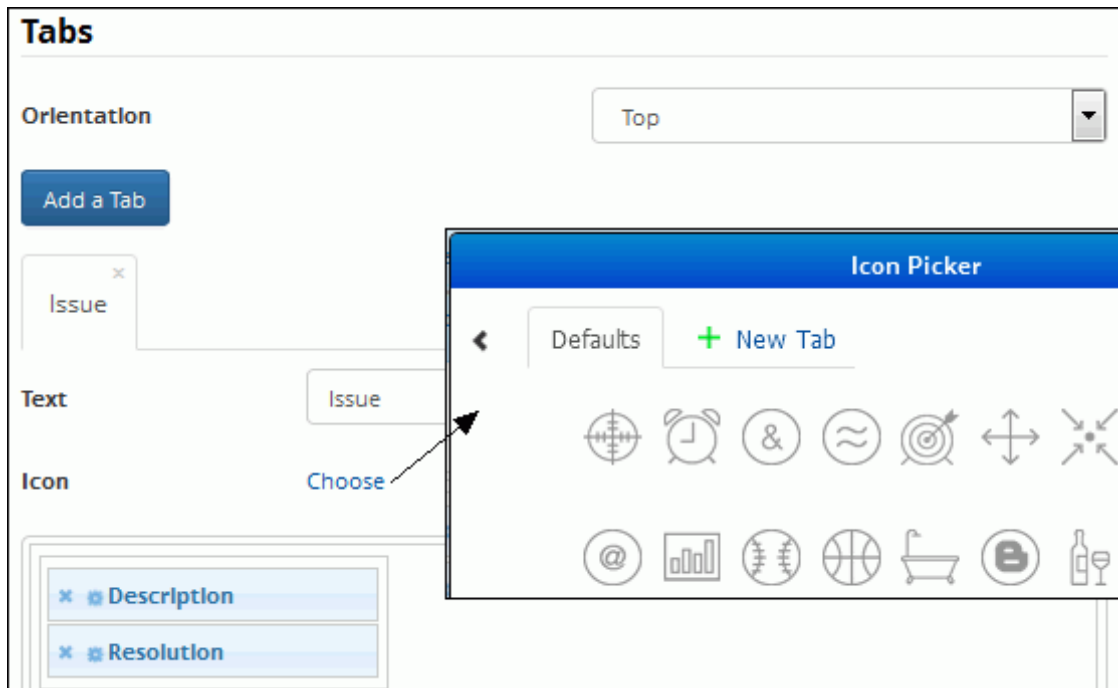
To configure the Details section in the upper right section of the resulting screen, drag fields from the selector on the left to the middle of the Details area on the Layout screen. For custom fields, you can either drag the fields under Custom Fields individually or you can drag Custom Fields under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

The screenshot shows the 'Main Layout' screen. On the left is a sidebar with a tree view containing 'Basics', 'List Items', and 'Custom Fields'. Under 'Custom Fields', there are several items: 'Server OS', 'Department Code', 'Date Issue First Noticed', and 'Budget Code'. On the right is the 'Details' section, which is a grid of fields. The fields are: 'Status', 'Priority', 'Number', 'Assignee', 'Created Date', and 'Author'. Each field has a small 'x' icon in the top left corner, indicating it is a required field.

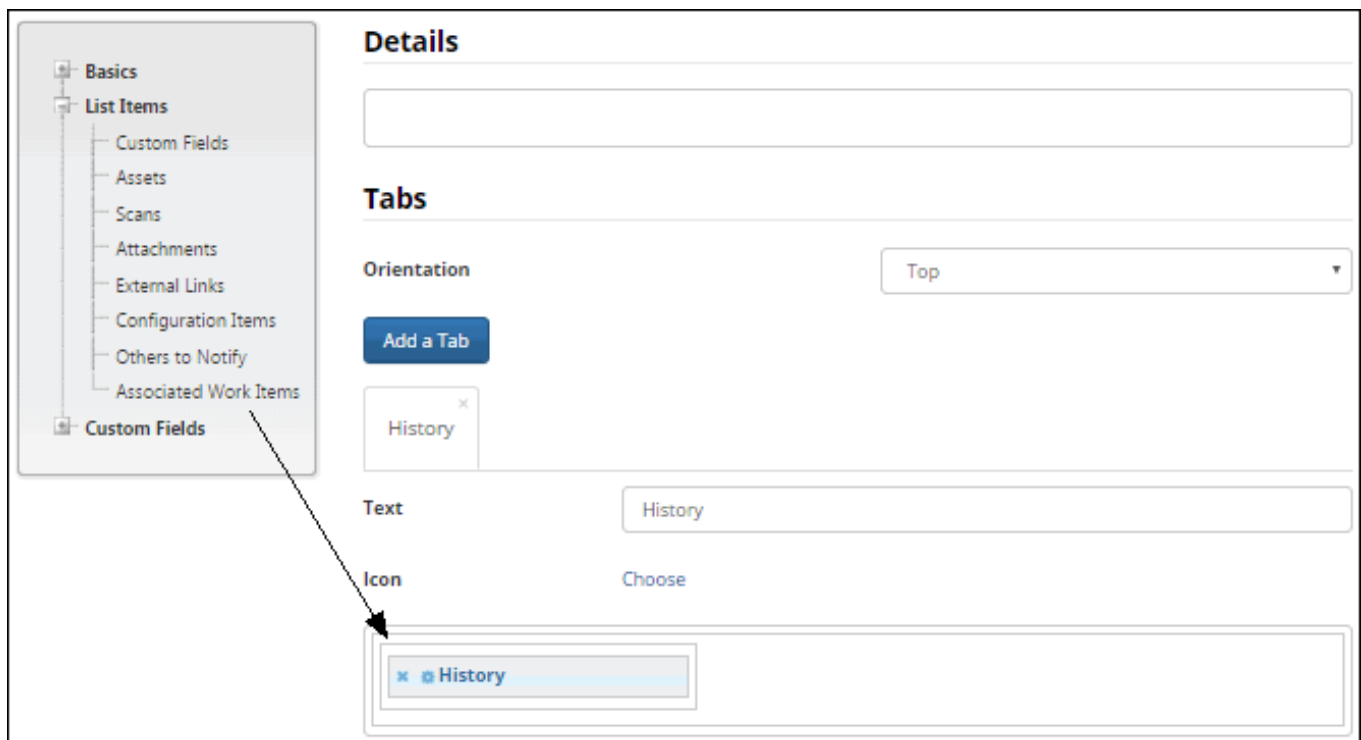
A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if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

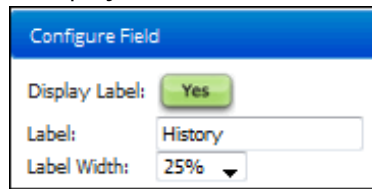


To add fields to the tab, drag fields from the selector on the left side of the Layout screen to the middle of the section below the Icon field.



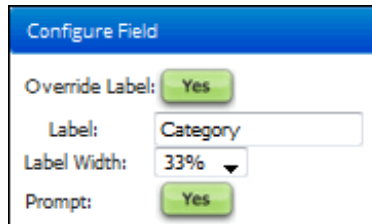
Configuring Fields

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.



The 'Configure Field' dialog box for the 'History' field. It has a blue header with the title 'Configure Field'. Below the header, there are three rows: 'Display Label:' with a green 'Yes' button, 'Label:' with a text input field containing 'History', and 'Label Width:' with a dropdown menu showing '25%'.

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.

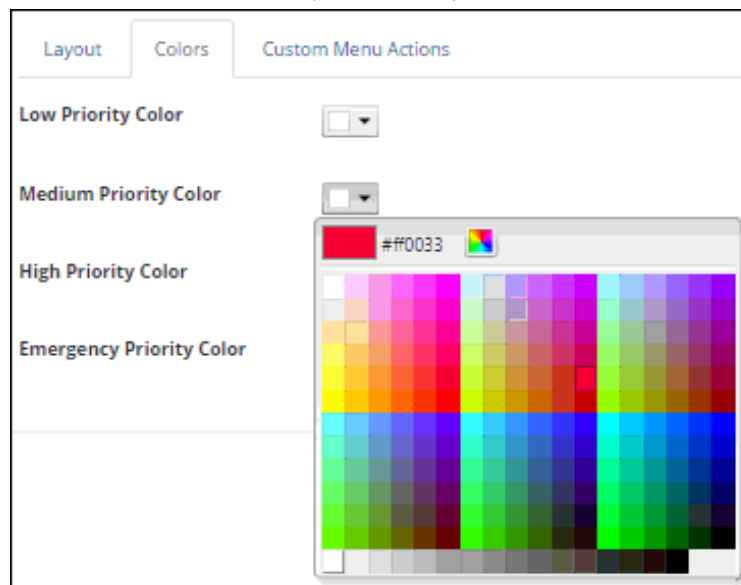


The 'Configure Field' dialog box for the 'Category' field. It has a blue header with the title 'Configure Field'. Below the header, there are four rows: 'Override Label:' with a green 'Yes' button, 'Label:' with a text input field containing 'Category', 'Label Width:' with a dropdown menu showing '33%', and 'Prompt:' with a green 'Yes' button.

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

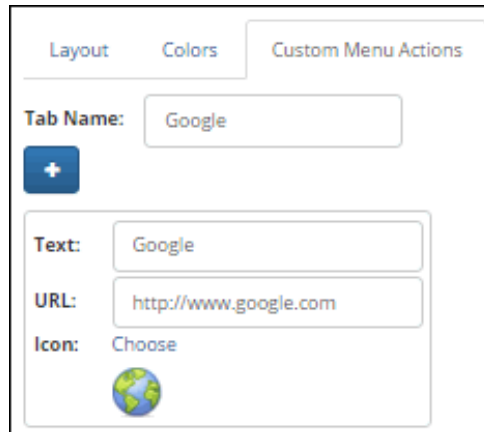
Use the Colors tab to configure the priority-based background colors for the upper portion of the Incident, Problem, and Change screens. You can choose from the color picker or input an HTML color code.





The 'Colors' configuration tab in the software interface. It has three tabs: 'Layout', 'Colors' (selected), and 'Custom Menu Actions'. Below the tabs, there are four rows for priority-based background colors: 'Low Priority Color', 'Medium Priority Color', 'High Priority Color', and 'Emergency Priority Color'. Each row has a dropdown menu. A color picker dialog is open over the 'High Priority Color' dropdown, showing a grid of color swatches. The color picker has a title bar with a red close button, a color selection icon, and the text '##0033'. The grid contains various color swatches, including red, orange, yellow, green, blue, and purple.

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.

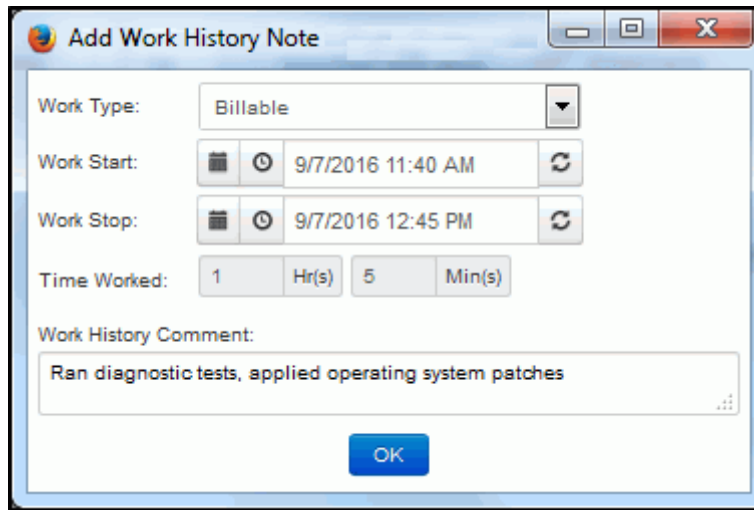


The screenshot shows a web interface with three tabs: "Layout", "Colors", and "Custom Menu Actions". The "Custom Menu Actions" tab is active. Below the tabs, there is a "Tab Name:" label followed by a text input field containing "Google". To the left of the input field is a blue square button with a white plus sign. Below the "Tab Name" section, there are three more input fields: "Text:" with "Google", "URL:" with "http://www.google.com", and "Icon:" with the text "Choose" and a small globe icon.

Layout	Colors	Custom Menu Actions
Tab Name: <input type="text" value="Google"/>		
		
Text: <input type="text" value="Google"/>		
URL: <input type="text" value="http://www.google.com"/>		
Icon: Choose 		

Configuring Work History Types

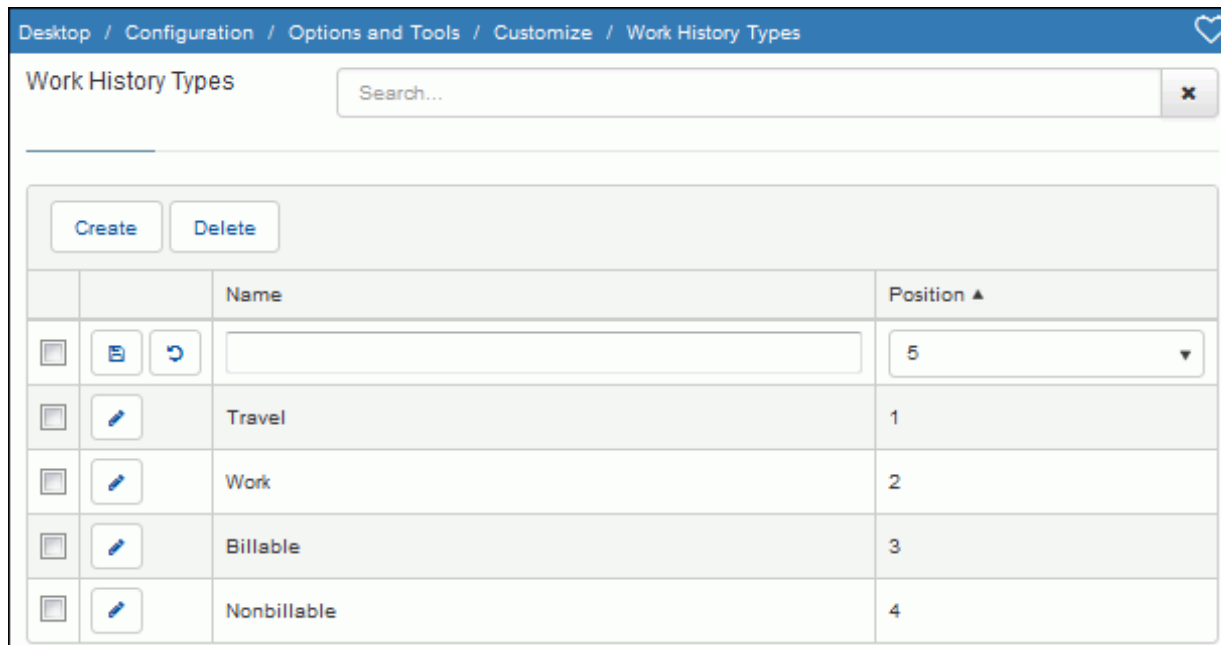
Use the Options and Tools | Customize | Work History Types screen to create custom entries for support representatives to select to describe the work performed on a work item. As shown in the example below, these entries will display as options in the Work Type field in the Work History and Save dialogs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









The 'Add Work History Note' dialog box contains the following fields:

- Work Type:** A dropdown menu with 'Billable' selected.
- Work Start:** A date and time picker showing '9/7/2016 11:40 AM'.
- Work Stop:** A date and time picker showing '9/7/2016 12:45 PM'.
- Time Worked:** Two input fields for 'Hr(s)' (value: 1) and 'Min(s)' (value: 5).
- Work History Comment:** A text area containing the text 'Ran diagnostic tests, applied operating system patches'.
- OK:** A blue button at the bottom center.

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.)



The 'Work History Types' configuration screen includes a search bar and a table with the following data:

		Name	Position ▲
<input type="checkbox"/>	 	<input type="text"/>	5
<input type="checkbox"/>		Travel	1
<input type="checkbox"/>		Work	2
<input type="checkbox"/>		Billable	3
<input type="checkbox"/>		Nonbillable	4

Configuring Purchase Request Templates

Use the Purchasing Purchase Request Templates screen to create templates for purchase requests that occur frequently. You can set defaults for populating fields in the Purchase Request screen and mySupport portal (if applicable).

Name	Accounting Training										
Default Status	Open ▼ + ✎										
Append Short Description/Comments to Existing Text	On Off										
Make Available to Support Representatives	On Off										
Make Available to mySupport	On Off										
Short Description											
Approval Cycle	None ▼ + ✎										
Rule Group	Executive Management Purchase Rules ▼ + ✎										
Cost Center	Accounting + ✎										
Job Function	Manager										
Recipient	Unassigned 3 ↑ Create: Customer • Support Rep										
Requested By	Unassigned 3 ↑ Create: Customer • Support Rep										
Bill To	Unassigned 3 ↑ Create: Customer • Support Rep										
Comments											
Add Line Item Delete Line Item											
<input type="checkbox"/>		Asset Type	Vendor	Product	Comments	Delivery (Days)	Expected (Days)	Quantity	Rate	Amount	Asset Create
<input type="checkbox"/>	✎	Training	LBLSoft	Accounting Training More...				1	\$100.00	\$100.00	<input type="checkbox"/>
										Total: \$100.00	

Name - Enter a name for the purchase request template. This name will display for selection in the Purchase Request screen.

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



Append Short Description/Comments to Existing Text - Select Yes to add a blank line and the text from the Short Description and/or Comments field to existing text when the template is applied to a saved purchase request.

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

Make Available to mySupport - Select Yes to allow the template to be used on the mySupport portal. You can create a link to the template using the mySupport Navigator screen.

Short Description - Enter the text to populate the Short Description field in the Purchase Request screen.

Approval Cycle - Select the predefined approval cycle to assign to purchase requests created via this template. This will override any other approval cycle (customer, category) associated with a purchase request.

Rule Group - If applicable, select the rule group to apply when the template is selected in the Purchase Request screen. The rule group assigned to the template will replace any existing rule groups that may be in effect (for the customer or customer's company). Use the Create New  and View/Edit  icons to access the Purchasing Rule Group screen; see ["Configuring Rules and Rule Groups for Purchasing" on page 38](#) for more information.

Cost Center - Select the cost center to populate the Cost Center field in the Purchase Request screen.

Job Function - Select the job function to populate the Job Function field in the Purchase Request screen.




Recipient - Select the support representative or customer to populate the Recipient field in the Purchase Request screen.

Requested By - Select the support representative or customer to populate the Requested By field in the Purchase Request screen.

Bill To - Select the support representative or customer to populate the Bill To field in the Purchase Request screen.

Comments - Enter the text to populate the Comments field in the Purchase Request screen. Place your cursor in the Comments field or click the field label link to display an HTML-based text editor toolbar for manipulating text and inserting images. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Adding Line Items

Click the Add Line Item button to add line items to the purchase request template. After making an entry, use the Save  icon to save it or the Cancel  icon to undo your entry. Use the Edit  icon to modify an entry.

Asset Type - Select the predefined asset type associated with the product to be included on the purchase request line item. Count tracking can be enabled for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit List Price fields to be included on an Asset record if the type is selected. If a Product record with a count-enabled asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Vendor - Select the vendor associated with the product to be included on the purchase request line item.

Product - Select the product to populate the Product field on the purchase request line item.

Delivery (Days) - Enter the number of days (after the purchase request creation date) to be used in the calculation of the date to display by default in the Delivery field on the purchase request line item.

Expected (Days) - Enter the number of days (after the purchase request creation date) to be used in the calculation of the date to display by default in the Delivery field on the purchase request line item.

Quantity - Enter the number to populate the Quantity field on the purchase request line item.

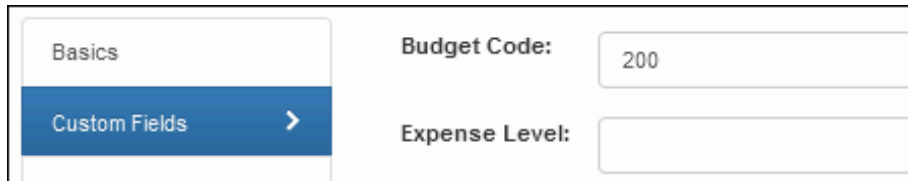
Rate/Amount - Enter the cost to be multiplied by the entry in the Quantity field; the result will be included in the Amount field for the purchase request line item.

Asset Create - Select this checkbox to create Asset records for the total quantity when all of the expected quantity for the line item is received. If a customer is the recipient on the order and the asset type uses the Owner field, those records will be populated with the customer. A link to the purchase order will be included in the History section of

the Asset record and a link to the newly created Asset records will be included in the History section of the purchase order.

Adding Custom Fields

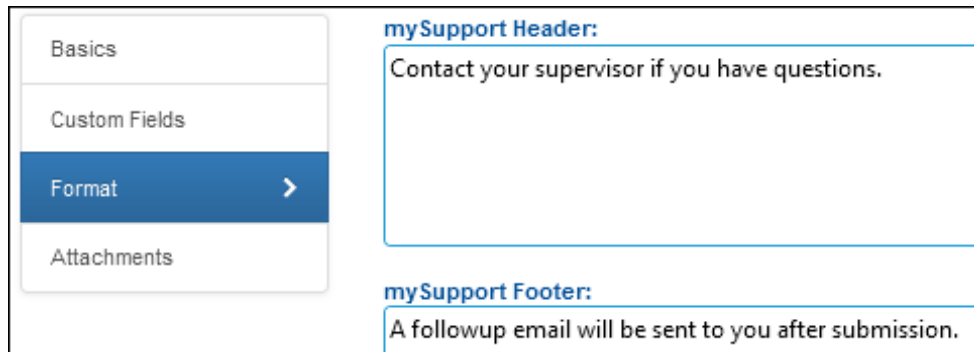
The Custom Fields tab contains custom fields configured via the Custom Fields screen; select the values to populate custom fields by default in incidents created by the template.



Basics	Budget Code:	200
Custom Fields	Expense Level:	

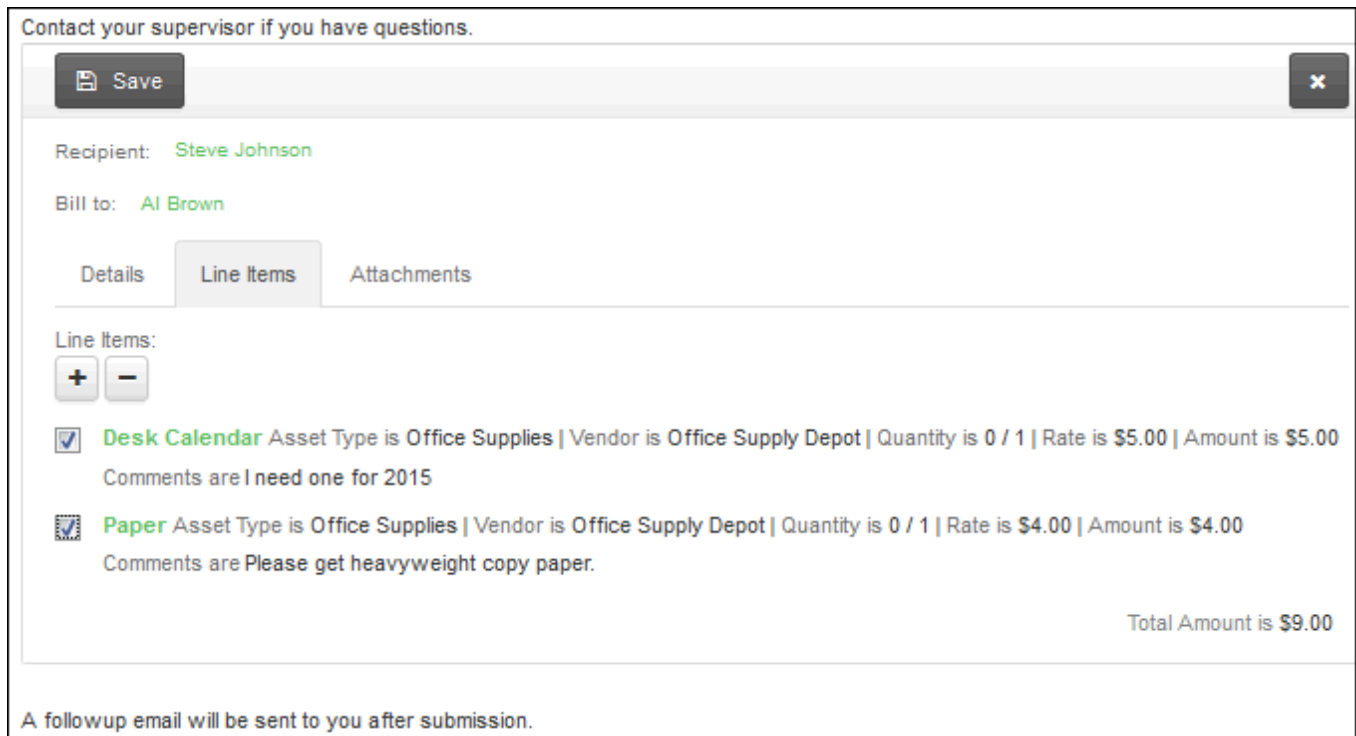
Formatting the mySupport Purchase Request Submit Screen

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



Basics	mySupport Header: Contact your supervisor if you have questions.
Custom Fields	
Format	mySupport Footer: A followup email will be sent to you after submission.
Attachments	

The header and footer will appear as follows:



Contact your supervisor if you have questions.

Save

Recipient: Steve Johnson

Bill to: Al Brown

Details Line Items Attachments

Line Items:

+ -

☒ **Desk Calendar** Asset Type is Office Supplies | Vendor is Office Supply Depot | Quantity is 0 / 1 | Rate is \$5.00 | Amount is \$5.00
Comments are I need one for 2015

☒ **Paper** Asset Type is Office Supplies | Vendor is Office Supply Depot | Quantity is 0 / 1 | Rate is \$4.00 | Amount is \$4.00
Comments are Please get heavyweight copy paper.


Total Amount is \$9.00

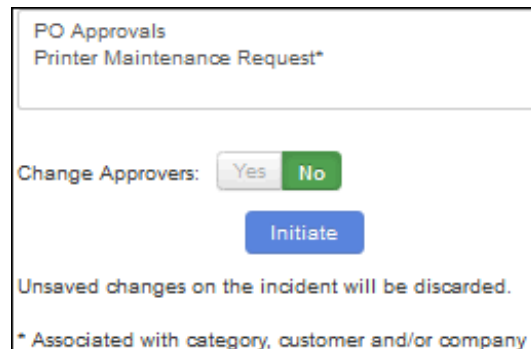
A followup email will be sent to you after submission.

Configuring Approval Cycles

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

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

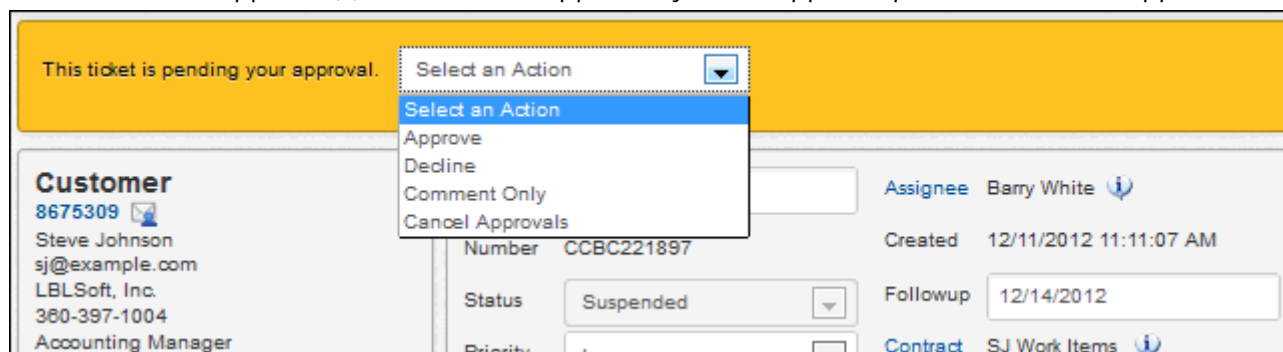
- The customer, company, selected category (for incidents and changes), or purchase request template has an associated approval cycle.
- A rule that initiates an approval cycle is in effect for an incident, change, or purchase that meets configured conditions. Multiple cycles can be specified for a rule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



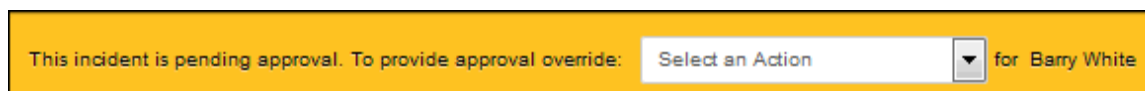
The status of the work item will change throughout the process as configured for the initial status, final approval, final decline, and cancellation. Notifications can be sent for approval events and verdicts.

Specifying a Verdict

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



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




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

The following can be selected:

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

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

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

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

Configuration Overview

Do the following to configure approvals:

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

Creating an Approval Cycle

Use the Approval Cycle screen to configure approval cycles consisting of serial or concurrent approvers, notifications, and statuses to assign while the cycle is in effect, final approval/decline, and cancellation. The same

approval cycles are used with incidents, changes, and purchase requests; however, you can designate statuses and notifications that are specific to each type of work item.

Basics >	Name	Tier II Review
Default Statuses >	Description	Review by Tier II reps
Approvers >		
Incident Notification Events >		
Change Notification Events >	Available for Ad Hoc Use	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
Purchase Notification Events >	Type of Approval	<input checked="" type="checkbox"/> Serial <input type="checkbox"/> Concurrent

Name - Enter a name for the approval cycle.

Description - Enter a description of the approval cycle.

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

Type of Approval - Select:

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

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

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

Default Statuses

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

The screenshot displays the 'Default Statuses' configuration page. On the left is a sidebar with navigation links: Basics, Default Statuses (selected), Approvers, Incident Notification Events, Change Notification Events, and Purchase Notification Events. The main content area is divided into three sections: Incident Approval Statuses, Change Approval Statuses, and Purchasing Approval Statuses. Each section contains four status fields: Initial Status, Final Approval Status, Final Decline Status, and Cancellation Status. Each field has a dropdown menu and two action buttons (a plus sign for 'Create New' and a pencil for 'View/Edit').

Section	Field	Status	Actions
Incident Approval Statuses	Initial Status	Open	+ ✎
	Final Approval Status	Dispatched	+ ✎
	Final Decline Status	Closed	+ ✎
	Cancellation Status	Suspended	+ ✎
Change Approval Statuses	Initial Status	Pending Approval	+ ✎
	Final Approval Status	Approved	+ ✎
	Final Decline Status	Declined	+ ✎
	Cancellation Status	Suspended	+ ✎
Purchasing Approval Statuses	Initial Status	Pending Approval	+ ✎
	Final Approval Status	Open	+ ✎
	Final Decline Status	Open	+ ✎
	Cancellation Status	Closed	+ ✎

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

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

Specifying Approvers

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

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

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

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

Basics >	Use Customer's Approver	Yes No																
Default Statuses >	Customer's Approver Approval Order	2																
Approvers >	Default Approver:	Mary Smith																
Incident Notification Events >	Add Remove																	
Change Notification Events >																		
Purchase Notification Events >																		
	<table><thead><tr><th><input type="checkbox"/></th><th>Order ▲</th><th>Name</th><th>Type</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>1</td><td>Connor Flynn</td><td>Support Representative</td></tr><tr><td><input type="checkbox"/></td><td>3</td><td>Nina Simone</td><td>Support Representative</td></tr><tr><td><input type="checkbox"/></td><td>4</td><td>Barry White</td><td>Support Representative</td></tr></tbody></table>	<input type="checkbox"/>	Order ▲	Name	Type	<input type="checkbox"/>	1	Connor Flynn	Support Representative	<input type="checkbox"/>	3	Nina Simone	Support Representative	<input type="checkbox"/>	4	Barry White	Support Representative	
<input type="checkbox"/>	Order ▲	Name	Type															
<input type="checkbox"/>	1	Connor Flynn	Support Representative															
<input type="checkbox"/>	3	Nina Simone	Support Representative															
<input type="checkbox"/>	4	Barry White	Support Representative															

Configuring Approval Notifications

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

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

▼ Approval Initiated		
Author	No Notification	+ ✎
Customer	No Notification iSupport Default Custom Incident Approval	+ ✎
Customer & CC Others To Notify	No Notification	+ ✎
Assignee (via email)	No Notification	+ ✎
Assignee (via page)	No Notification	+ ✎
Assignee - First Rep to Notify	No Notification	+ ✎
Assignee - Second Rep to Notify	No Notification	+ ✎
Assignee & CC Others To Notify	No Notification	+ ✎
Others To Notify	No Notification	+ ✎
Approvers	No Notification	+ ✎

► Approval Requested

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Configuring Rules and Rule Groups for Purchasing

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

- Change values in the Customer and Rep Bill To, Customer and Rep Recipient, Customer and Rep Requested By, and Status fields, as well as any custom fields; a template can also be set
- Send notifications via email or desktop notification
- Initiate an approval cycle
- Execute a webhook for posting purchasing data to a web application

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

A default purchase rule group will be included in iSupport on installation or upgrade. Upgrades will convert previously configured notifications into rules and rule groups. You can use the Purchasing Rule Groups screen to create rule groups and assign them to customers, companies, and templates. (You can also assign rule groups via those entry screens.) See ["Creating Rule Groups" on page 47](#) for more information.

If a customer profile does not have an associated rule group, the rule group associated with the customer's company will be used for the customer. Any rule group associated with a purchase request template will take precedence for a purchase request. Note that rules in the associated rule group will not execute while an incident is pending approval.

Rule Types

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

Name

Configure Conditions

Rule type is

Hours of Operation:

Match of the following conditions:

<input type="text" value="Event"/>	<input type="text" value="Is"/>	<input type="text" value="Purchase Initially Saved"/>	<input type="button" value="+"/> <input type="button" value="⋮"/>
<input type="text" value="Total Amount"/>	<input type="text" value="Greater Than"/>	<input type="text" value="\$500.00"/>	<input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="⋮"/>
<input type="text" value="Purchase Status"/>	<input type="text" value="Is"/>	<input type="text" value="Open"/>	<input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="⋮"/>

Configure Actions

Initial approval cycle: [Configure](#)

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

Name Purchase Request Pending Approval

Configure Conditions

Rule type is Time-Based

Hours of Operation: None

Match All of the following conditions:

Purchase Status Is Pending Approval (Open)

Configure Time Frame Intervals and Actions

Intervals	Time	Minutes/Hours/Day(s)
1	8.00	Hours

Notify - Email Author With Default Notification Approvals - Reminder - Rep

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 enabled on the Agents tab in the Rules opening screen.

Edit Agent Settings

This agent searches all configured time-based rules, monitors time frames, and performs configured actions if conditions in the rules are met.

Enable Yes No Run Now

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.

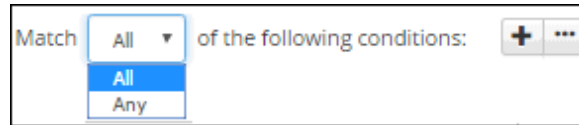
Creating Rules

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 40](#) and [“Configuring Actions” on page 41](#) for more information. See [“Creating Time Frame Intervals for Time-Based Rules” on page 44](#) 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.

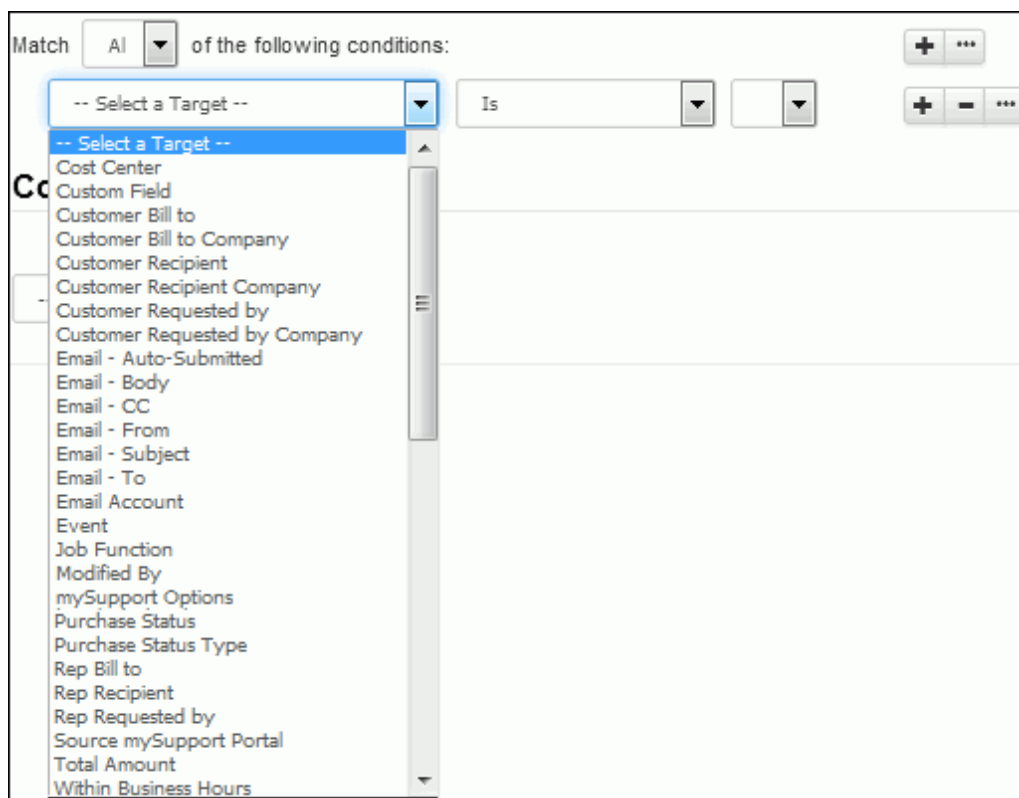


Match **All** of the following conditions: + ...

All

Any

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 purchase request save. In the Select a Target dropdown, select what to evaluate.



Match **All** of the following conditions: + ...

-- Select a Target --

-- Select a Target --

Cost Center

Custom Field

Customer Bill to

Customer Bill to Company

Customer Recipient

Customer Recipient Company

Customer Requested by

Customer Requested by Company

Email - Auto-Submitted

Email - Body

Email - CC

Email - From

Email - Subject

Email - To

Email Account

Event

Job Function

Modified By

mySupport Options

Purchase Status

Purchase Status Type

Rep Bill to

Rep Recipient

Rep Requested by

Source mySupport Portal

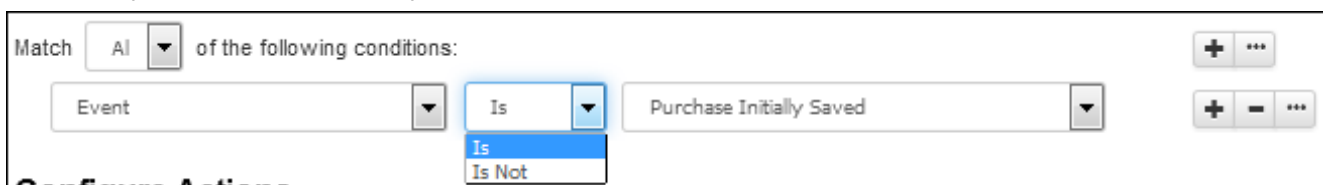
Total Amount

Within Business Hours

Is

+ - ...

In the next dropdown, select the comparison method.



Match **All** of the following conditions: + ...

Event

Is

Is

Is Not

Purchase Initially Saved

+ - ...

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 conditions with the Customer Work History Added or Work History Added to Purchase events, the rule will be triggered immediately when the event occurs (even if the purchase request 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 purchase request will not be saved until the support representative saves the purchase request.

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:

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

- **Execute a configured webhook** for posting Purchase data to a web application. See ["Configuring Webhooks" on page 50](#) 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.

Configure Actions

Notify - Desktop

-- Select Recipients --

-- Select Support Reps --

-- Select Support Groups --

New Assignment

Approvers

×

White, Barry

×

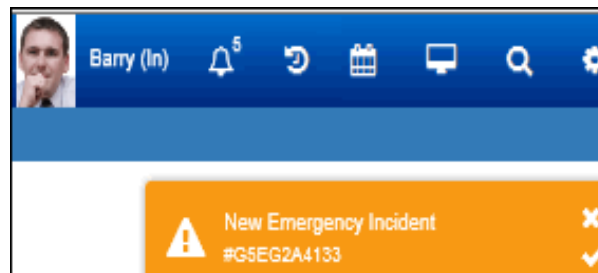
Trainers

×

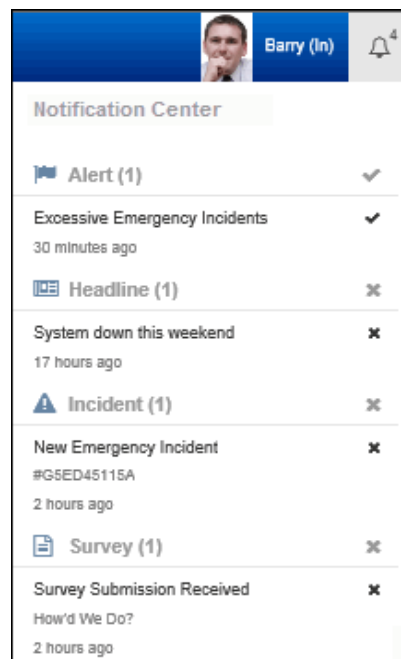
Assignee

×




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. You can click the Show Notification  icon to display the contents of the selected notification, and use the Create New  and View/Edit  icons to access the Custom Notification screen.

- **Initiate approvals** by selecting Initiate Approvals and clicking the Configure link.

iSupport's Approval feature requires a purchase request to be approved by designated approvers before it can be closed. The rule in effect can initiate one or more approval cycles. Approval cycles can be associated with customers, companies, and purchase request templates.

The Approvals dialog appears for you to specify the initial approval cycle, any additional cycles to apply if there is no initial approval cycle or the initial cycle results in an approval, and the final cycle to apply. Note that any

changes to these settings will not affect current purchase requests pending approval, and rules in the associated rule group will not execute while a purchase request is pending approval.

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

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

If the First Associated Cycle is Approved, Apply This Second Cycle - This field appears if an associated cycle was selected in the previous field. Select the approval cycle to apply if the cycle specified in the First Associated Cycle field results in an approval.

If the Second Associated Cycle is Approved, Apply This Third Cycle - This field appears if an associated cycle was selected in the previous field. Select the approval cycle to apply if the cycle specified in the previous field results in an approval.

If No Associated Cycle Applies, Use This Approval Cycle - Select the predefined approval cycle to apply if there are no approval cycles associated with the customer, customer's company, or template.

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

Creating Time Frame Intervals for Time-Based Rules

Time-Based and Time-Based: Cumulative Rules

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

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

Name Purchase Request Pending Approval

Configure Conditions

Rule type is Time-Based

Hours of Operation: None

Match All of the following conditions:

Purchase Status Is Pending Approval (Open)




Configure Time Frame Intervals and Actions

Intervals	Time	Minutes/Hours/Day(s)
1	8.00	Hours

Notify - Email Author With Default Notification Approvals - Reminder - Rep

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) field to specify the amount and unit of time (in minutes, hours, or days) 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 purchase request will be monitored for eight hours after initial save; if the status remains at Pending Approval (Open) for the entire eight hours, the Approvals - Reminder - Rep notification will be sent to the author of the purchase request.

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 purchase request will be monitored for an eight hour time frame and if the status remains at Pending Approval (Open) for the entire eight hours the Approvals - Reminder - Rep notification will be sent to the author. The purchase request will then be monitored for

an additional four hour time frame. If the status remains at Pending Approval (Open) for the entire four hours, the Approvals - Reminder - Rep notification will be sent to Tess French.

Name

Configure Conditions

Rule type is

Hours of Operation:

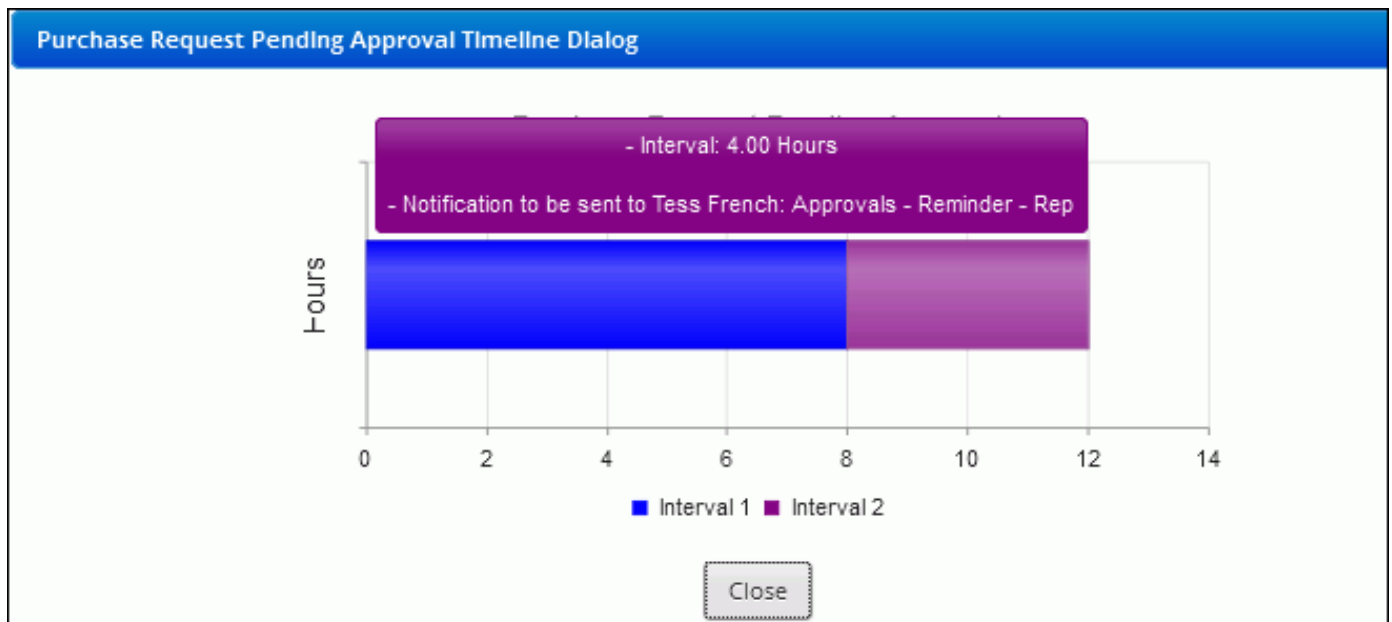
Match of the following conditions:

Configure Time Frame Intervals and Actions

Intervals	Time	Minutes/Hours/Day(s)
1	8.00	Hours
Notify <input type="text" value="Author"/> With <input type="text" value="Default Notification"/> Approvals - Reminder - Rep		
1	4.00	Hours
Notify <input type="text" value="Selected Support Rep"/> French, Tess With <input type="text" value="Default Notification"/> Approvals - Reminder - Rep		

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:	Purchase Request Pending Approval
Target Entity:	Purchase
Type:	Time-Based
Cumulative:	No
Conditions:	Match all of the following conditions: If Purchase Status is Pending Approval (Open)
Actions:	Repeat 1 time(s) every 8.00 hours Notification to be sent to Author: Approvals - Reminder - Rep Repeat 1 time(s) every 4.00 hours Notification to be sent to Tess French: Approvals - Reminder - Rep
Rule Groups:	Default Purchase 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 groups and click OK. The rule group displays along with its position as shown below:

Basics	Add Remove	
Rule Groups		
<input type="checkbox"/>	Name ▲	Position
<input type="checkbox"/>	Default Purchase Rules	1 ▼

All rules in the rule group associated with a purchase request/order are evaluated when it 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 Purchasing Rule Groups screen to create a rule group that can be used as default and/or applied to customers, companies, and purchase request templates.

Change	Create Copy Delete Rules
Email	
Incident	
Knowledge Entry	
Opportunity	
Problem	
Purchase >	
Survey	

Name ▲	Default
<input type="checkbox"/> Default Purchase Rules	Default
<input type="checkbox"/> Executive Management Purchase Rules	

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

The screenshot shows the 'Rule Groups' configuration screen. On the left is a sidebar with 'Basics' (selected), 'Customers', 'Companies', and 'Templates'. The main area has a 'Name' field with 'Executive Management Purchase Rules'. Below it is a checkbox 'This is the default Purchase Rule Group' which is checked, with 'On' and 'Off' buttons. The 'Hours of Operation' is set to '24/7' with a dropdown and '+'/'-' icons. Below this is a section 'Add Rules to This Rule Group' with 'On Save' and 'Time-Based' tabs. There are 'Add' and 'Remove' buttons. A table below shows one rule: 'Notify Recipient if Approval Required' at position 1.

<input type="checkbox"/>	Name	Position ▲
<input type="checkbox"/>	Notify Recipient if Approval Required	1 ▼

Name - Enter a name for the rule group; this name will appear in the Purchase Request screen when the rule group is in effect for a purchase request.

This is the Default Purchase Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the customer, company, or template on a purchase request.

More than one rule group may apply to a purchase request; if a purchase request template selected for a purchase request has a rule group, it will override any other rule group that may apply.

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 purchase request are evaluated when a purchase request 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.

This screenshot shows the 'Add Rules to This Rule Group' section. It has 'On Save' and 'Time-Based' tabs. Below are 'Add' and 'Remove' buttons. A table lists two rules: 'Notify Recipient if Approval Required' at position 1 and 'Initiate Approval for Total Over 500' at position 2.

<input type="checkbox"/>	Name	Position ▲
<input type="checkbox"/>	Notify Recipient if Approval Required	1 ▼
<input type="checkbox"/>	Initiate Approval for Total Over 500	2 ▼

Assigning a Rule Group

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

Basics	Add
Customers >	
Companies	
Templates	

<input type="checkbox"/>	Last Name ▲	First Name	Phone	Location	Company	Department	Email	Customer ID
<input checked="" type="checkbox"/>	Jackson	John	360-397-1000		LBLSoft, Inc.		example@example.local	

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:	Executive Management Purchase Rules
Target Entity:	Purchase
Default:	No
Hours of Operation:	24/7
Customers:	John Jackson
Companies:	
Categories:	
Templates:	
Hierarchy Templates:	
On Save Rules:	
Rule Name:	Notify Recipient if Approval Required
Target Entity:	Purchase
Type:	On Save
Conditions:	Match all of the following conditions: If Purchase Status is Pending Approval (Open)
Actions:	Notification to be sent to Recipient: Initial Save - Approval Initiated - Cust
Rule Groups:	Executive Management Purchase Rules
Rule Name:	Initiate Approval for Total Over 500
Target Entity:	Purchase
Type:	On Save
Conditions:	Match all of the following conditions: If Event is Initially Saved and If Total Amount greater than \$500.00 and If Purchase Status is Open
Actions:	Initial approval cycle: Maintenance Approvals
Rule Groups:	Default Purchase Rules Executive Management Purchase Rules
Time-Based Rules:	

[Print](#) [Close Window](#)

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.

Parameters	
iSupport Field	Parameter Name
Number	Number
Assignee	Assignee
Customer	Customer

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.

Configure Conditions

Rule type is: On Incident Save

Hours of Operation: None

Match **All** of the following conditions:

- Category is Categorization: Web Site - Access Request

Configure Actions

Execute Webhook: Incident Webhook

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.

Basics >

Change

Correspondence

Incident

Problem

Purchase

Database Maintenance Agent

This agent maintains data resulting from incomplete saves, deleted records, etc.

Time Agent Should Run Each Day

11:30 PM

Run Now

Archive Agent

This agent moves closed work items and sent correspondence documents that meet archive criteria to an archive database.

Time Agent Should Run Each Day

12:00 AM

Run Now

Max Duration

4

Hour(s)

Chat Log Purge

90

days

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.

Basics	Incident	
Change	Archive Enabled	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Correspondence	Elapsed amount of time before a closed incident is moved from the production database to the cSupport_Archive database	<input type="text" value="1"/> <input type="button" value="Years"/> <input type="button" value="v"/>
Incident >	Statuses to Archive	<div>Closed</div>
Problem	Purge Enabled	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Purchase	Elapsed amount of time before archived incidents are purged from the cSupport_Archive database	<input type="text" value="1"/> <input type="button" value="Years"/> <input type="button" value="v"/>

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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