Configuring iSupport’s Service Contract Functionality

Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. You can set up contracts based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (time frame in days), or a combination (limiting the number of incidents and/or changes within a specified daily time frame). You can assign a service contract to one or more customers, companies, or assets.

Overview

Basic Configuration

- Enable and set **basic Service Contract options** via the Core Settings | Feature Basics screen. See “Setting Service Contract Feature Basics Options” on page 3 for more information.
- Configure **roles/permissions** for support reps and rep groups using Incident functionality via the Support Representatives screen. See the online help for more information.
- Configure submission and display of service contracts via a **mySupport** customer portal via the mySupport | Portals screen. See the online help for more information.

Optional Customization

- Create and customize Service Contract event **notifications** via the Custom Notifications screen. See the online help for more information.
- Set up **custom fields** to include in the Service Contract screen via the Custom Fields screen. See “Configuring Custom Fields” on page 6.
- Create customized labels for the Service Contract **status levels** of Active, Inactive, Suspended, and Expired via the Custom Status Labels screen. See “Defining Custom Status Labels” on page 11.
- Include a field for an automatically generated number entering a **custom number** specific to your company via the Custom Numbers screen. See “Defining Custom Numbers” on page 12,

Optional Integration

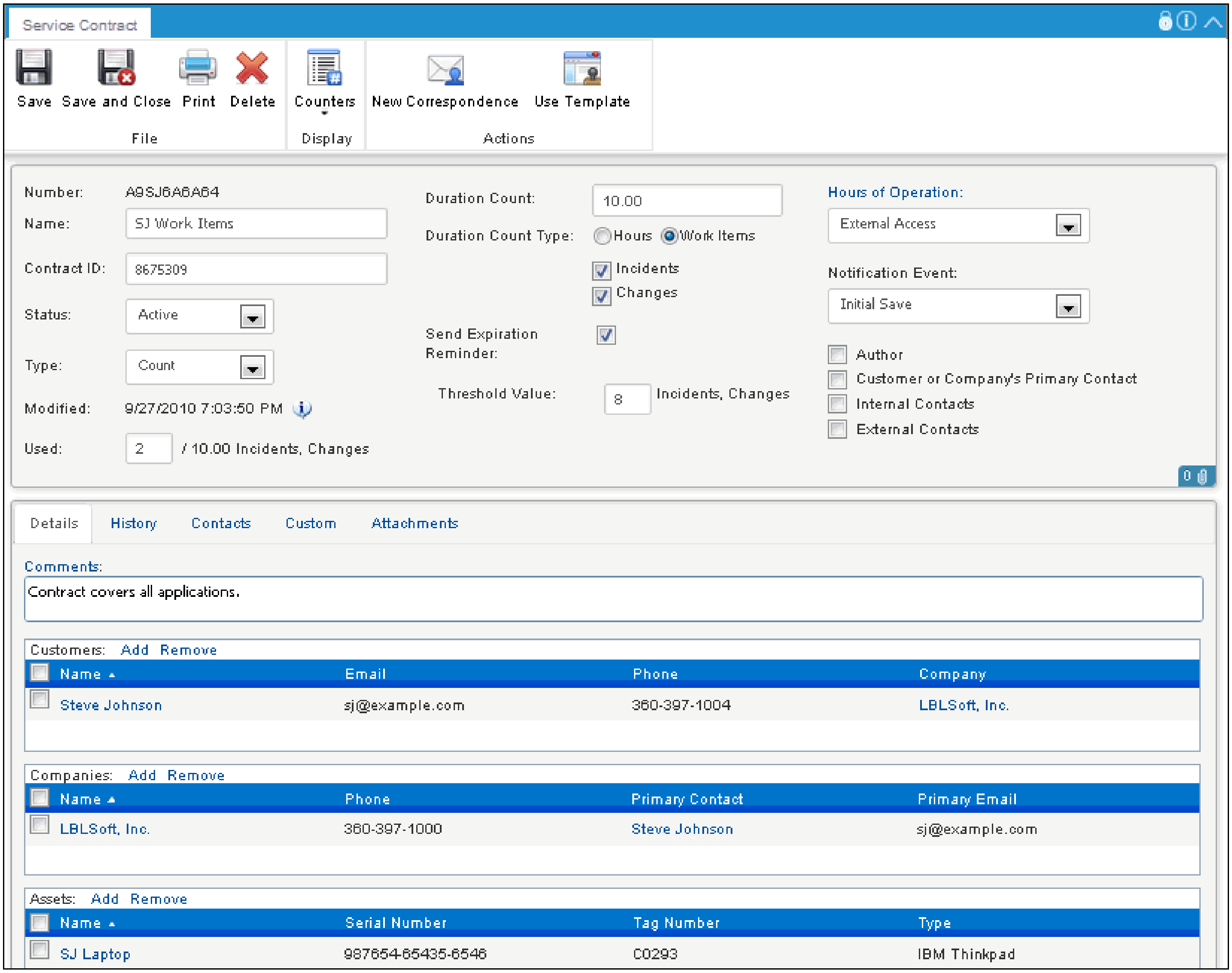
- Configure **webhooks** for posting Service Contract data to a web application. See “Configuring Webhooks” on page 15.

Optional Automation

Create **templates** to populate fields for common service contracts via the Templates screen; see“Creating Service Contract Templates” on page 16.

The Service Contract Screen

Create a service contract via the Desktop Create menu. You can also assign or create a service contract using the Service Contracts field in the Customer Profile, Asset, and Company screens.

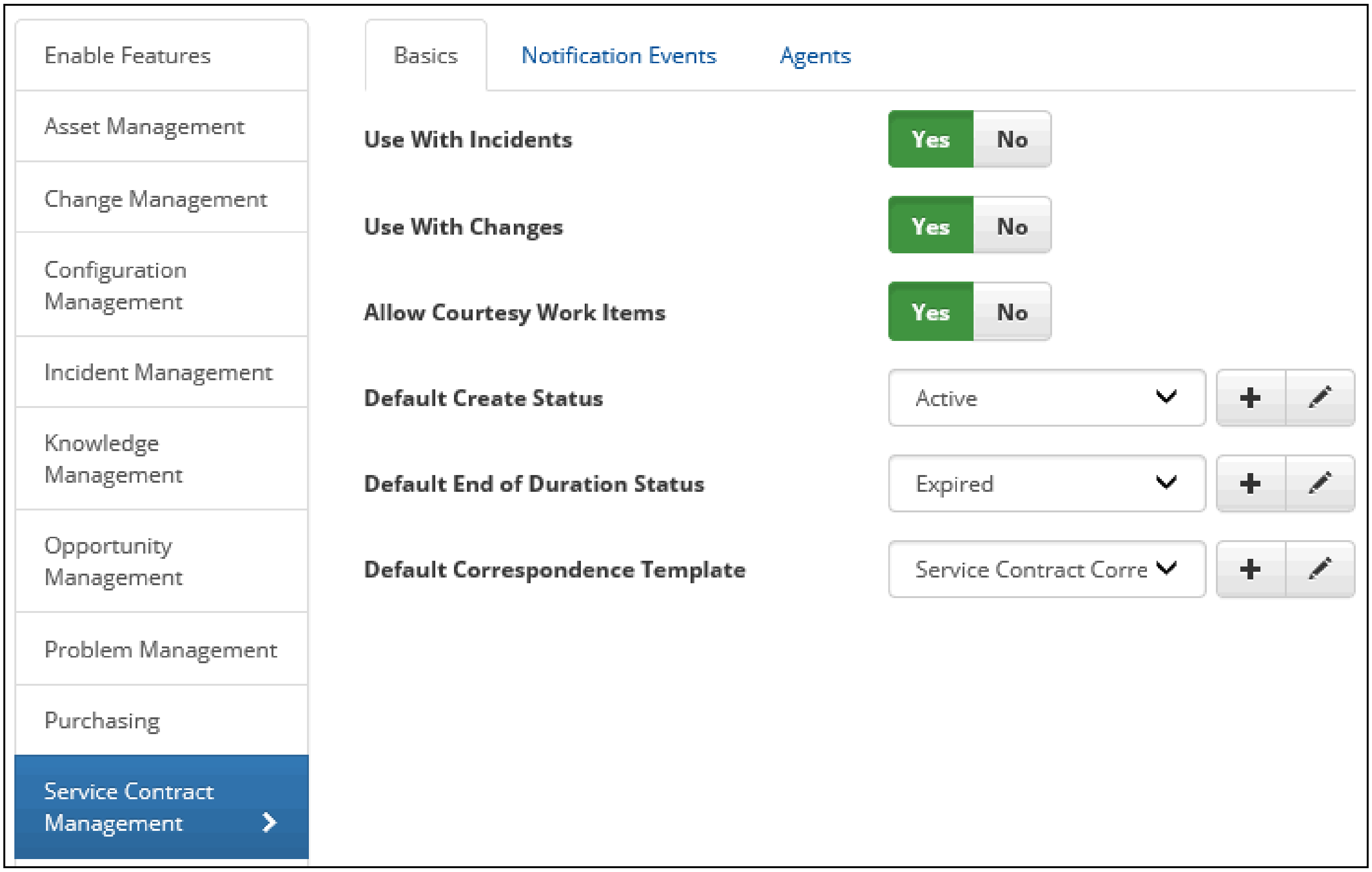


Setting Service Contract Feature Basics Options

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

Completing the Basics Tab

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



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

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

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

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

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

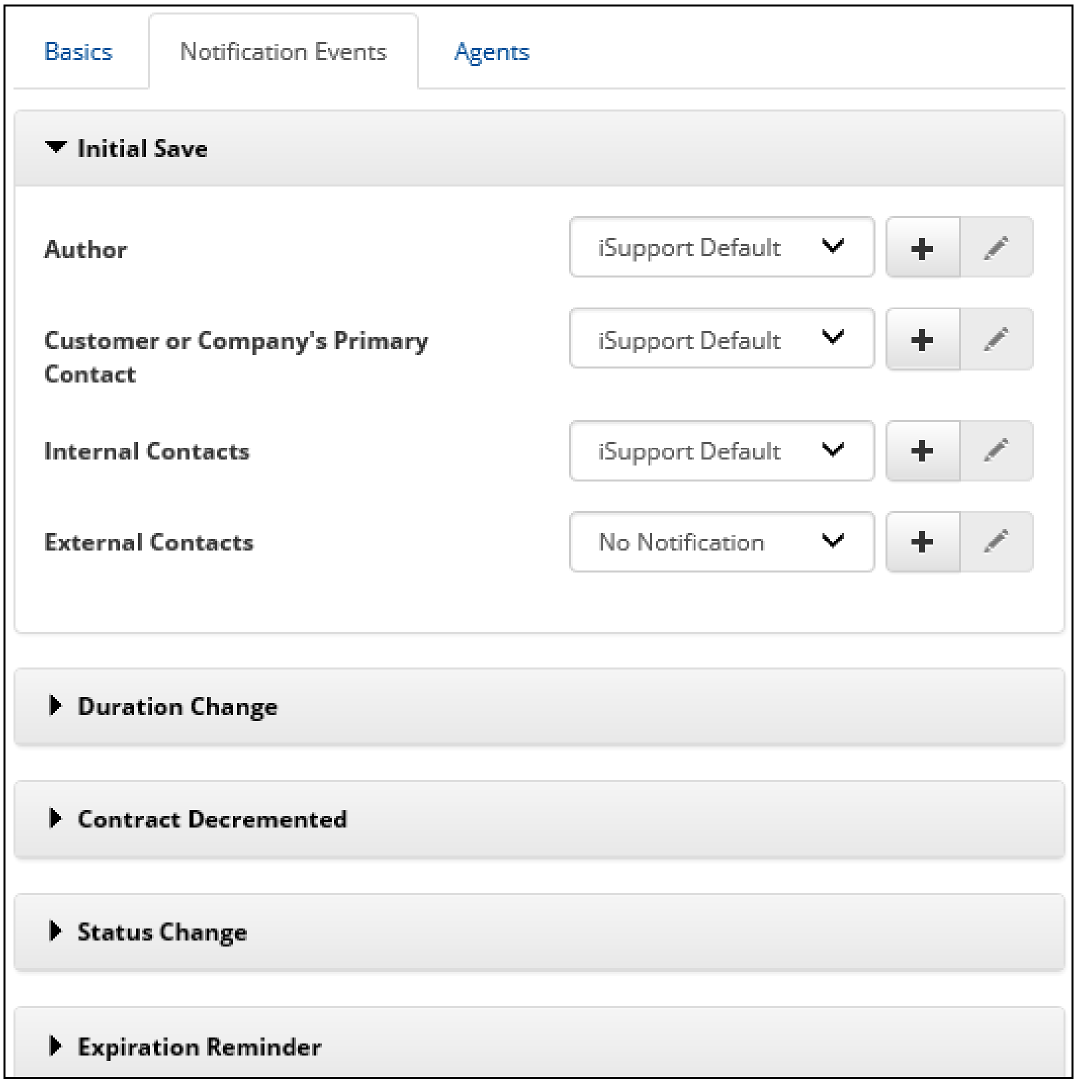
Default End of Duration Status - Select the Expired status level to assign to the contract by default when the date in the Duration End field is reached. Use the Create New + and View/Edit icons to access the Custom Status Labels screen; see "Defining Custom Status Labels for Service Contracts" on page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

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

Setting Up Notifications for Service Contract Events

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

The notifications on this screen are used as defaults for the Notification Event field in the Service Contract entry screen. Use the fields below to enable specified notifications to be sent to specified recipients for Service Contract events. You can select the default notification or a predefined custom notification; use the Create New and View/Edit icons to access the Custom Notifications screen. Note that these settings will be used if nothing is selected in the Notification Event section in the Service Contract entry screen and no template is selected. Notifications are sent according to the schedule of the Service Contract agent; see “Enabling the Service Contract Agent” on page 5.



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

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

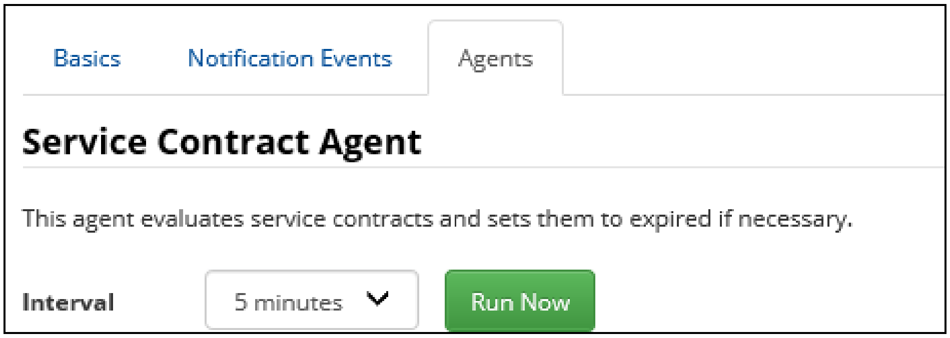
Contract Decremented - Select the recipients and notifications to be sent when an incident or change is counted against a service contract.

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

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

Enabling the Service Contract Agent

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

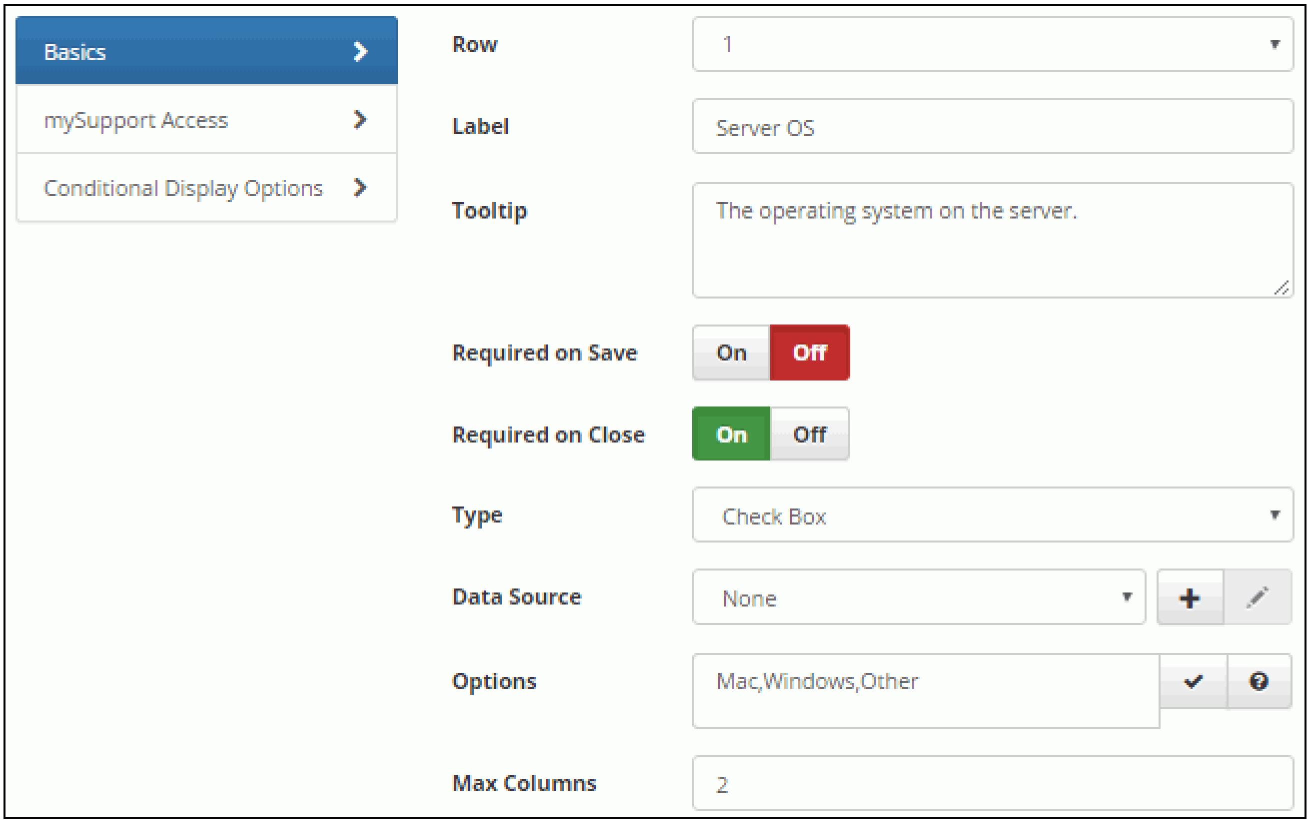


Configuring Custom Fields

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

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

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



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

Label - Enter the label for the custom field.

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

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

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

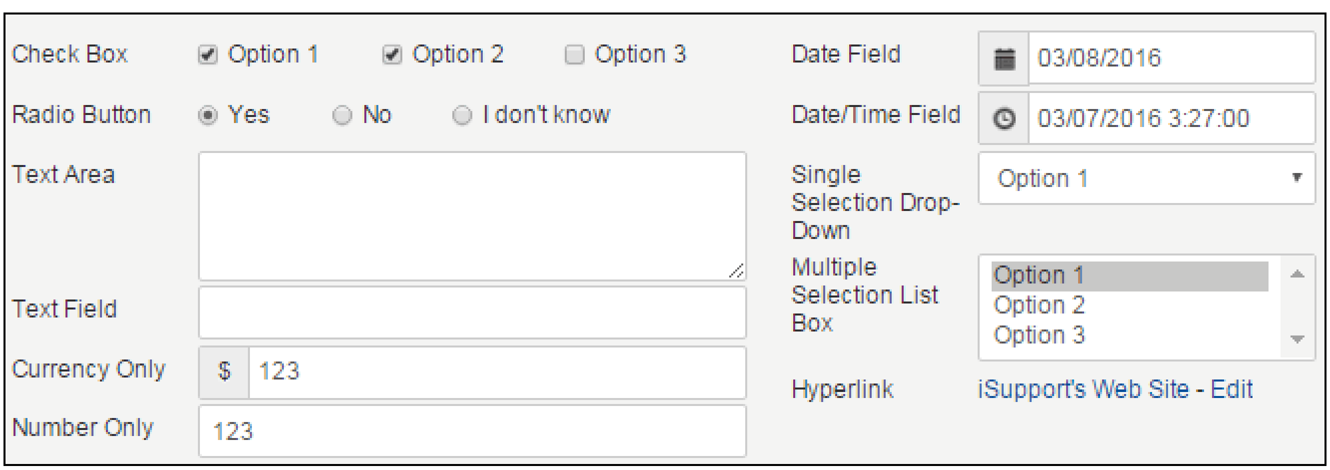
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see “Pulling From a Data Source” on page 9 for more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

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

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

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

Examples are shown below.



Options - This field displays when creating a radio button, checkbox, multiple selection list box, or single selection drop-down. Enter or paste items into this field; separate each value with a comma or return and click the Commit Items icon when finished. Select items to specify defaults and drag items to change the order. Options can be populated by and synchronized with a SQL data source; see "Pulling From a Data Source" on page 9 for more information.

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

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

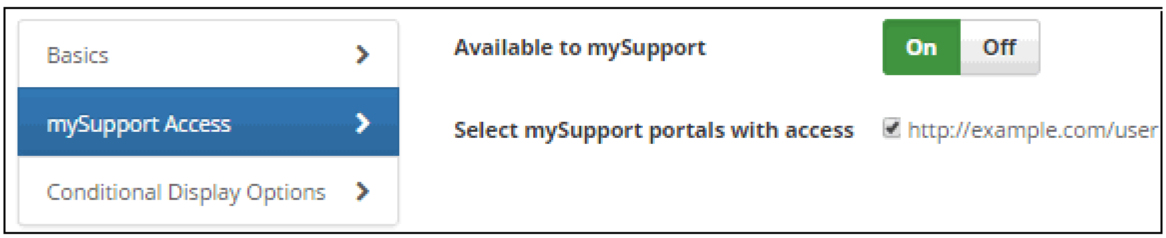
Max Columns/Max Rows - For Check Box and Radio Button type fields, enter the maximum number of columns to display (the fields will wrap to multiple rows); for a Multiple Selection List Box type field, enter the maximum number of rows to display (causing a scroll bar to appear).

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

mySupport Access Options

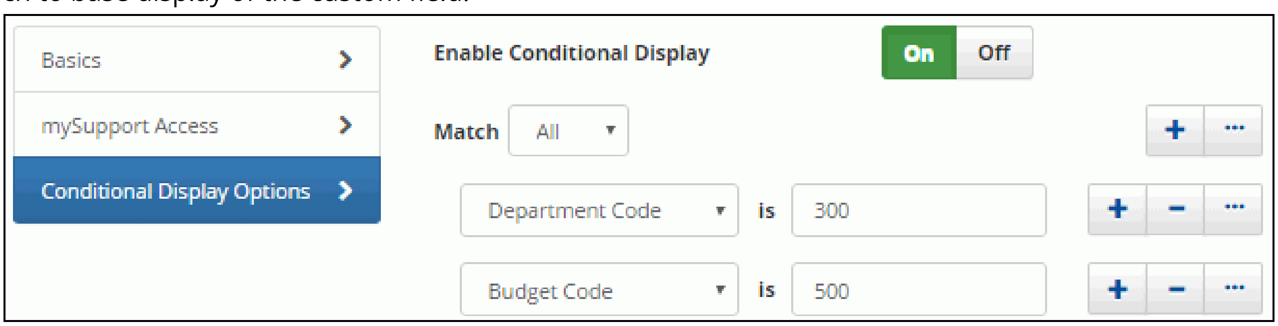
Available to mySupport - Select On to enable the field to appear on a mySupport portal.

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



Conditional Display Options

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

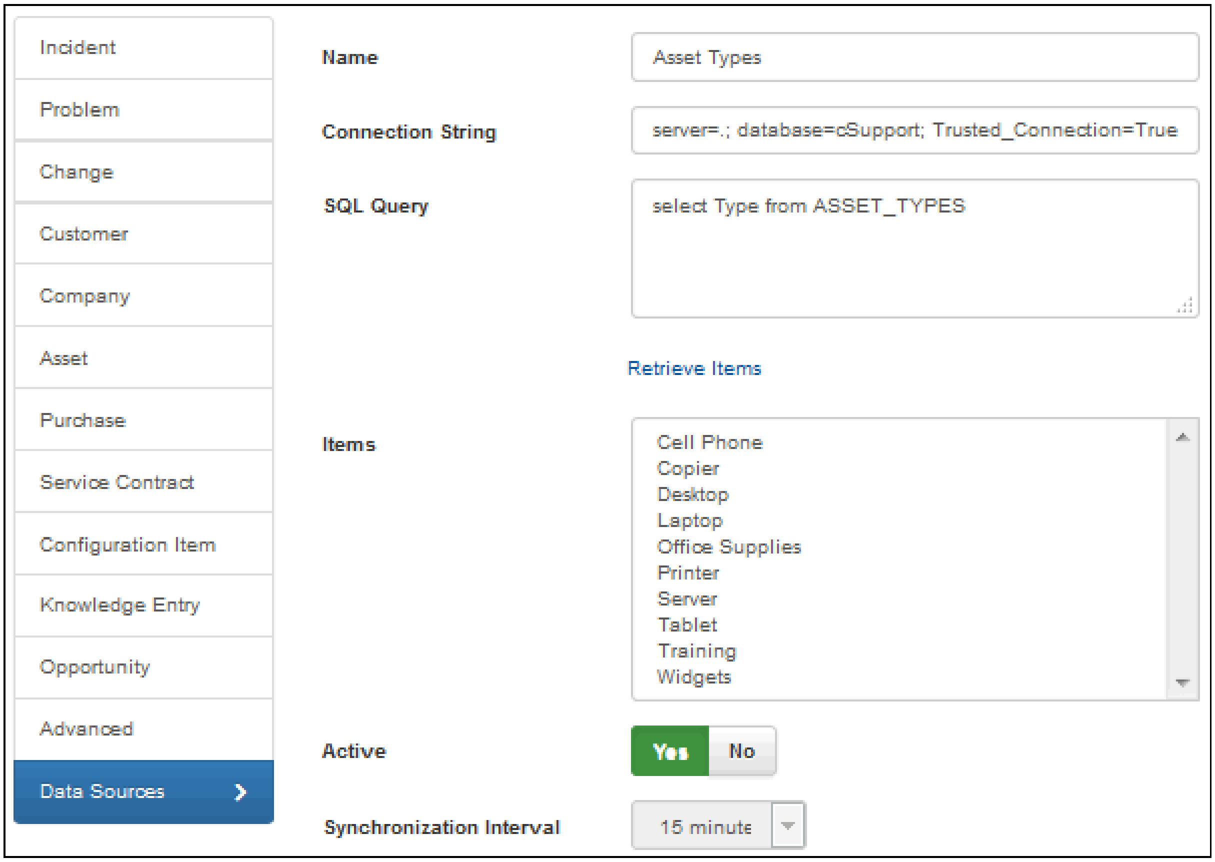


Use the Match *<All/Any>* field to specify whether you want **every** *<field>* is *<value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition + and Remove Condition − icons to display and remove a *<field>* is *<value>* search condition. Click the Add Condition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

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

Pulling From a Data Source

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



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

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

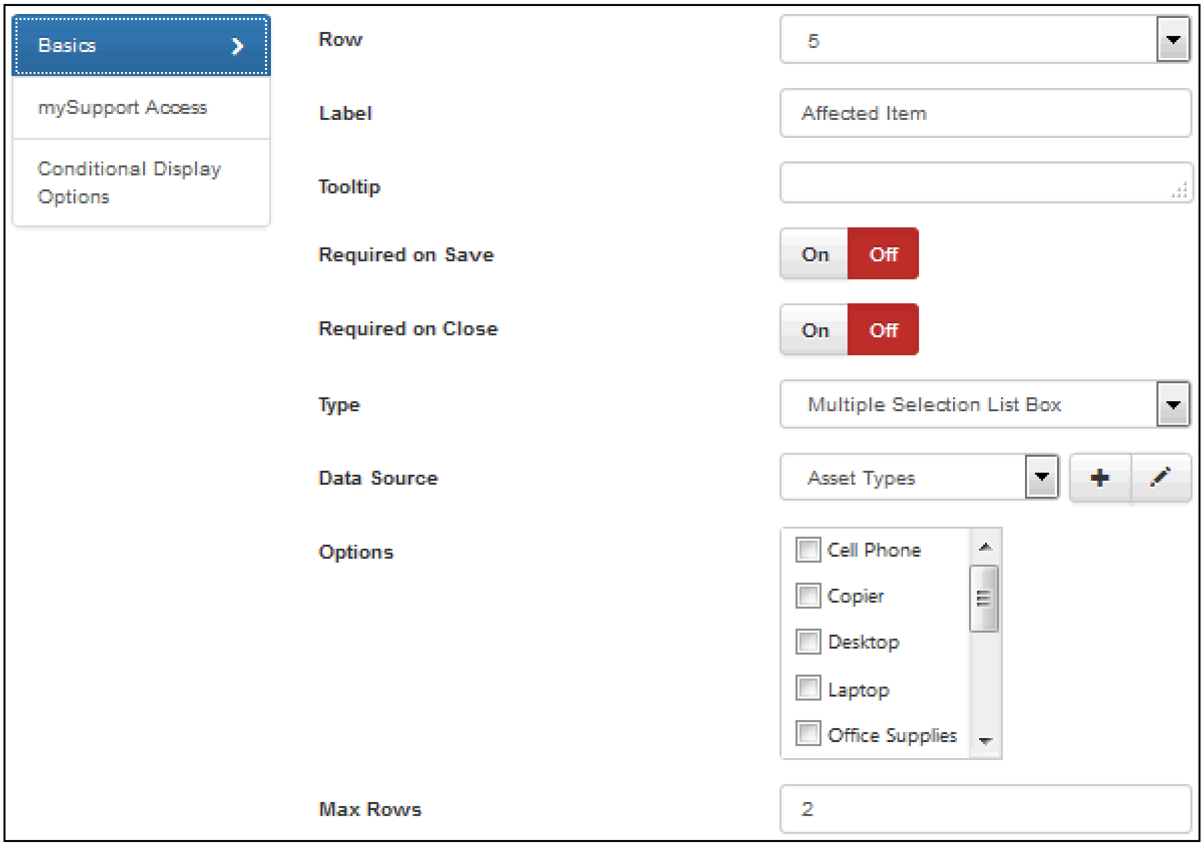
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Click the Retrieve Items button to populate the Items field using this string.

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

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

Using the Data Source for a Custom Field

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



Defining Custom Status Labels

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

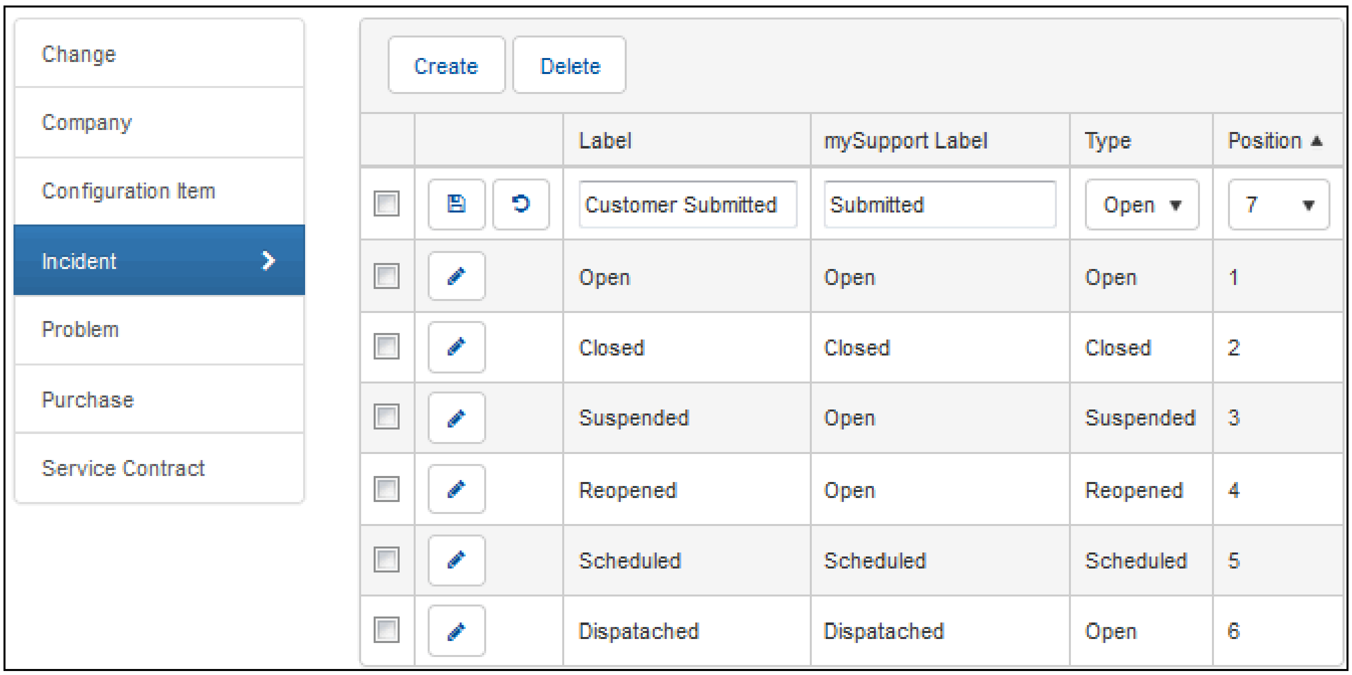
If you have the Incident Management Edition, you can define labels for the following work item types:

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

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

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

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



Label - Enter the name for the status.

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

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

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

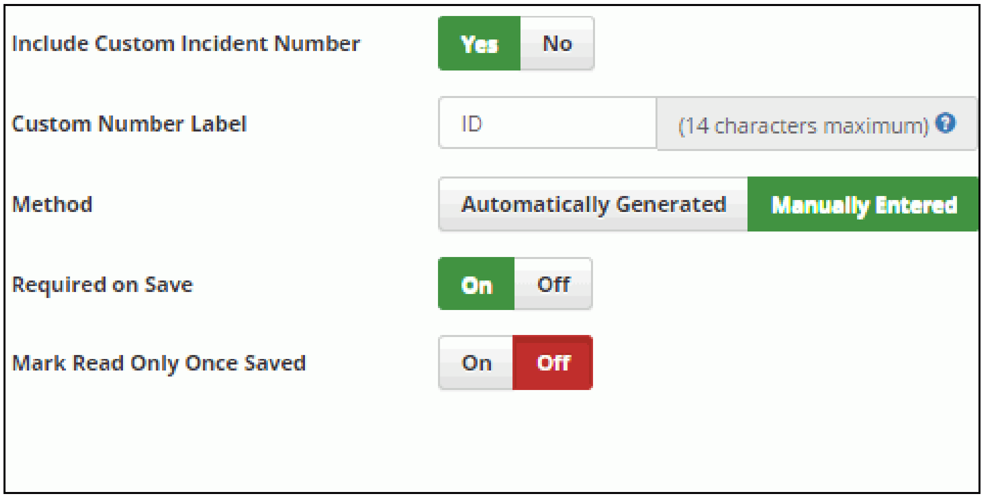
Defining Custom Numbers

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

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

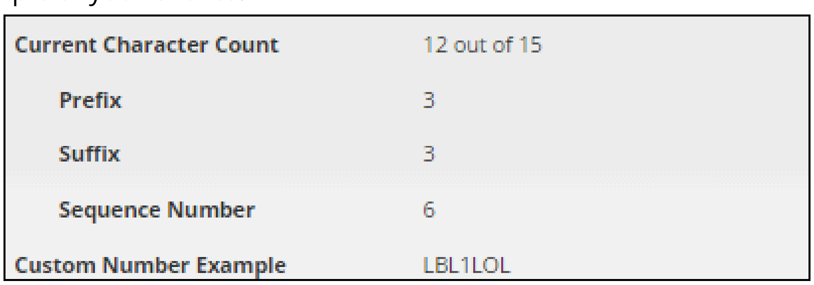
Configuring a Manually Entered Number

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



Configuring an Automatically Generated Number

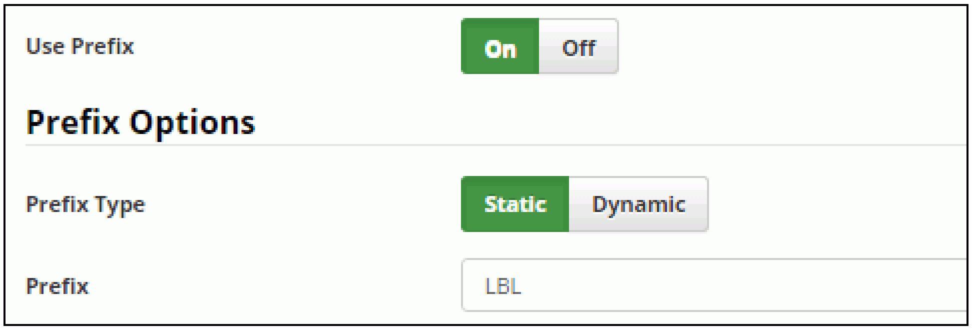
The Automatically Generated option creates numbers automatically based on prefix, suffix, and sequence settings that you configure. You can either use a static (fixed) custom prefix and suffix, restricted via a start and end number if desired. Prefixes and suffixes can be static (fixed) or dynamic; however,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



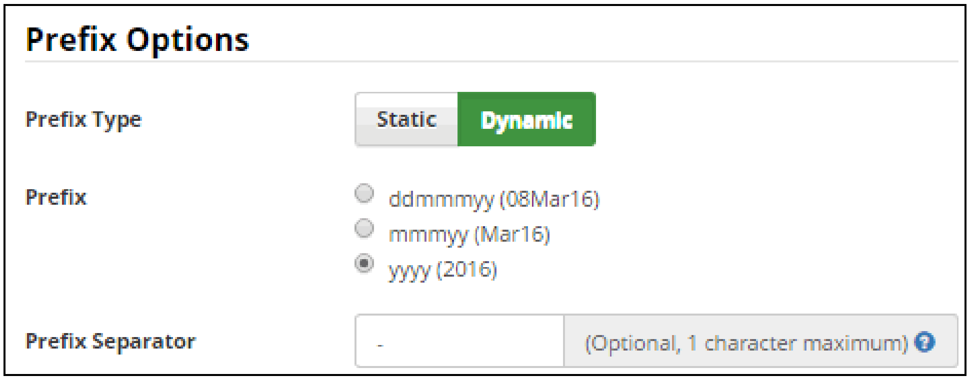
Configuring the Prefix

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

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



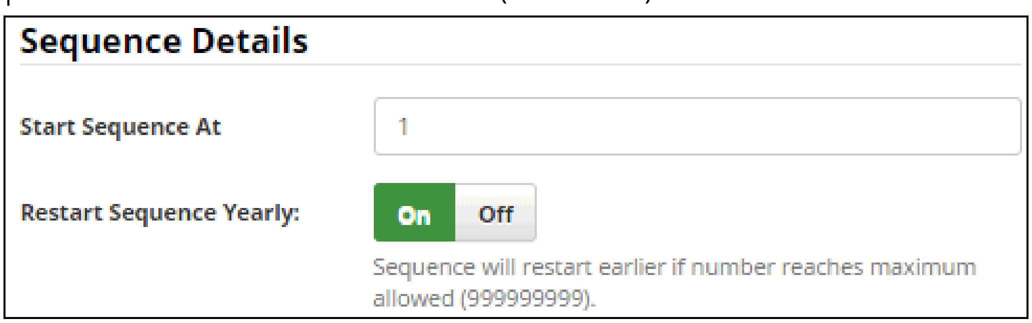
- If using a Dynamic prefix type, select the day, month, and year combination in the Prefix field. You can optionally enter a character (such as a hyphen) in the Prefix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.



__Configuring the Sequence__

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

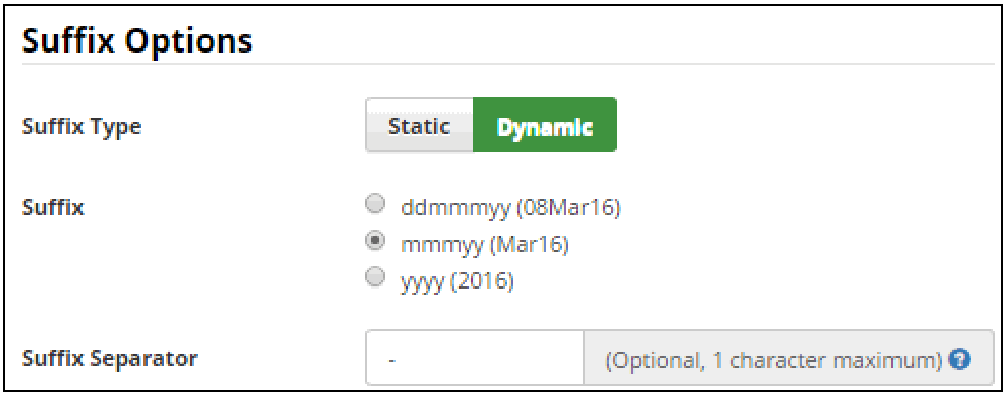
- Enter the number to start the sequence in the Start Sequence At field.
- Your selection in the Prefix field will determine the Restart Sequence field. If you select yyyy and you wish to restart the sequence when the first work item is created after 12:00pm on December 31, select Yes in the Restart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



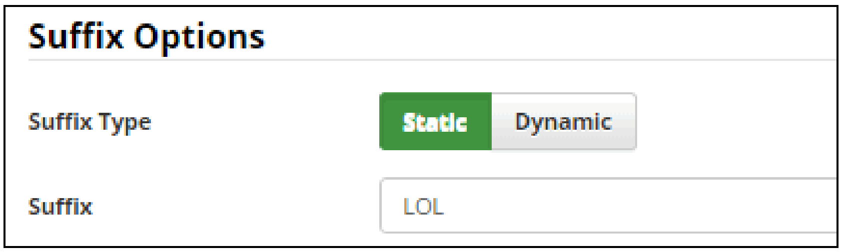
__Configuring the Suffix__

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

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



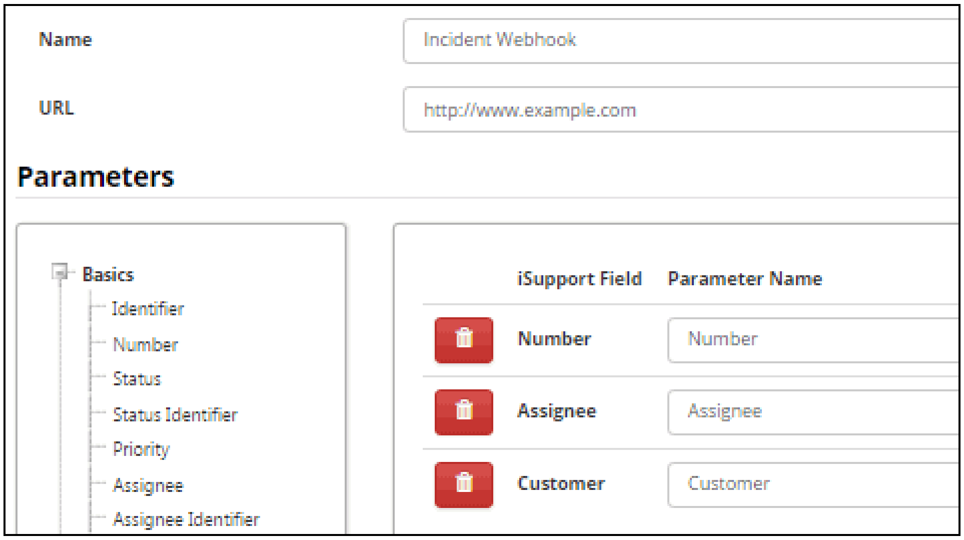
- If using a Static suffix type, enter the characters (letters, numbers, or symbols) in the Suffix field.



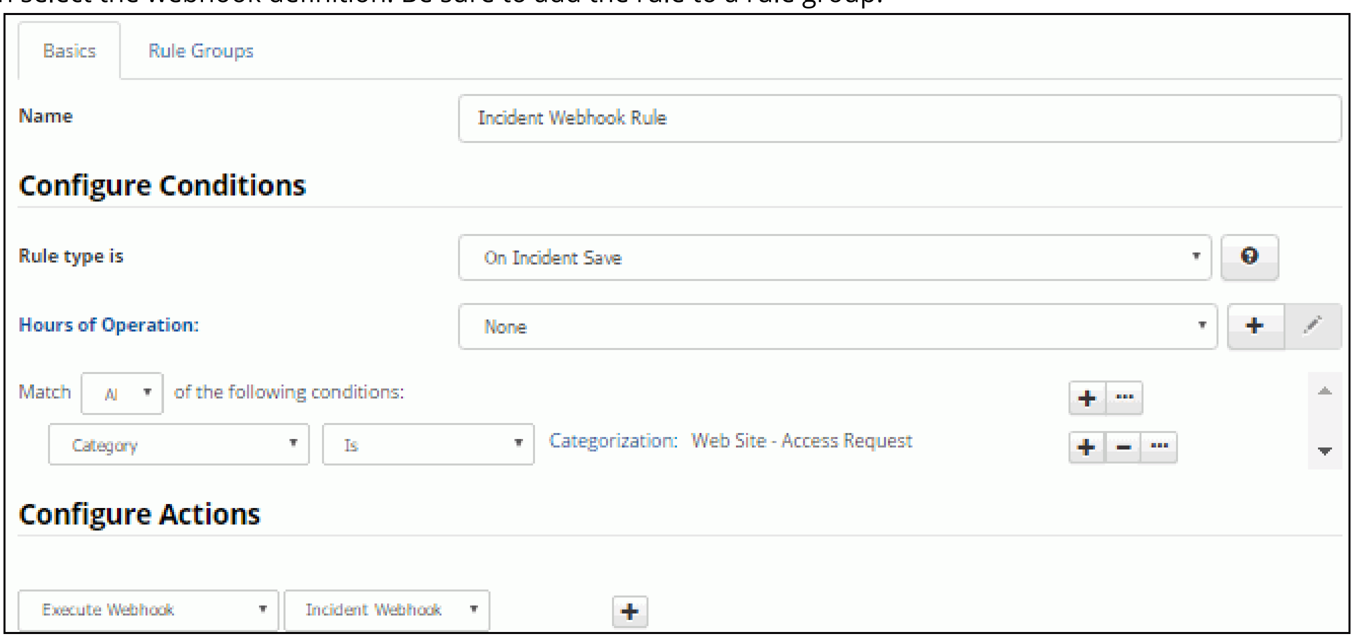
Configuring Webhooks

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

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

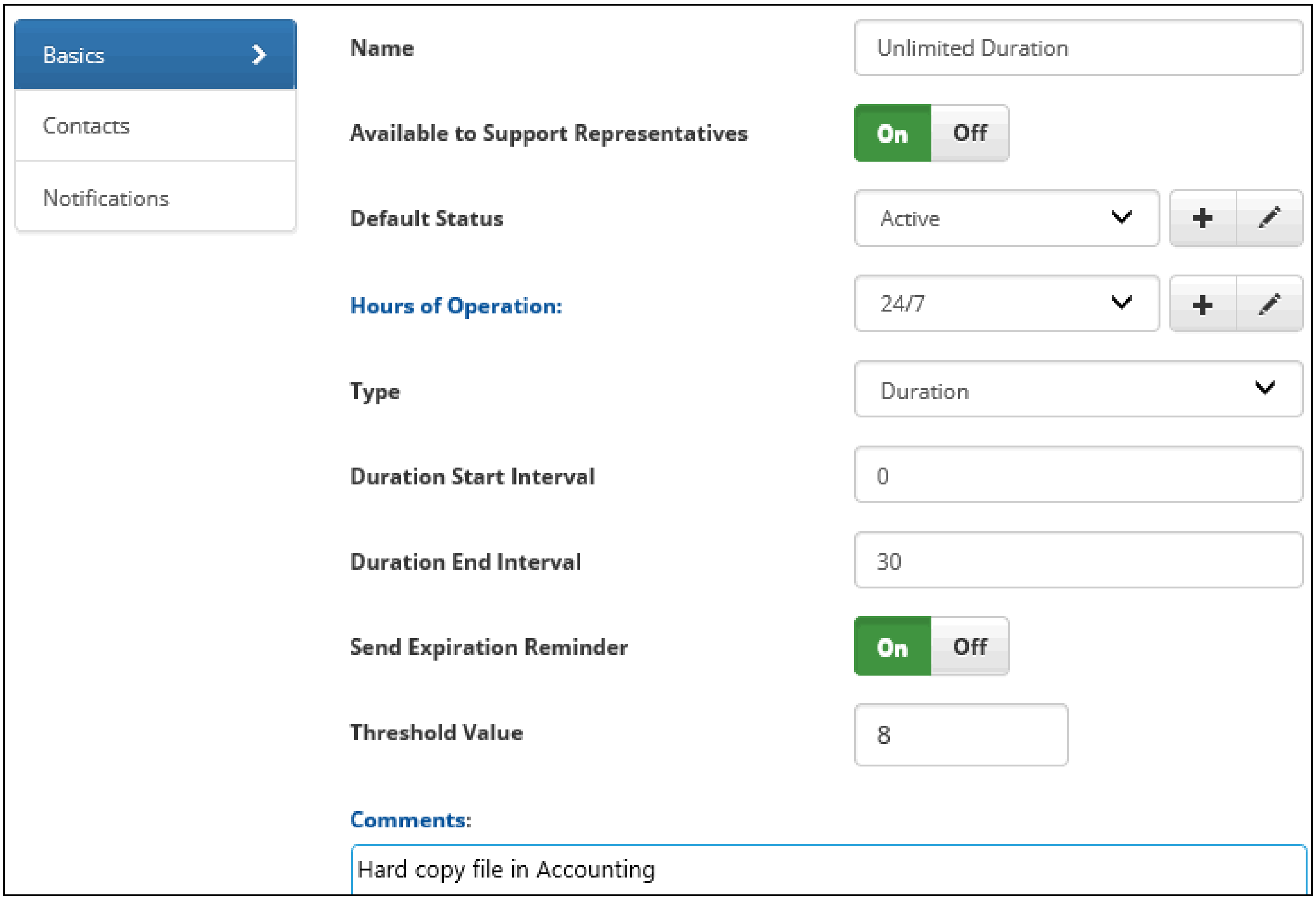


Use the applicable Rule screen to configure the conditions and time frame on which the post action will occur. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition. Be sure to add the rule to a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



Creating Service Contract Templates

Use the Service Contract Templates screen to create templates for service contracts that are entered frequently.



Name - Enter a name for the template to appear in the template selection dialog and by default in the Name field in the Service Contract screen after the template is selected.

Default Status - Select the Active, Inactive, Suspended, or Expired status level to populate the Status field in the Service Contract entry screen. Select the status level to display by default when a service contract is created. Use the Create New + and View/Edit icons to access the Custom Status Labels screen; see "Defining Custom Status Labels for Service Contracts" on page 506 for more information.

Type - Select the contract basis to display by default in the Type field in the Service Contract entry screen:

- Duration - a specified number of incidents and/or changes within a specified time frame (in days)
- Count - a specified number of hours or work items (incidents and/or changes)
- Both - a specified number of incidents and/or changes within a specified daily time frame

Duration Count - Enter the number to display default in the Duration Count field in the Service Contract entry screen. This value is the maximum number of hours or incidents and changes allowed under the contract. Hours or incidents and/or changes are counted against a contract when the record is initially saved.

Duration Count Type - Select one of the following to display by default in the Duration Count Type field in the Service Contract entry screen:

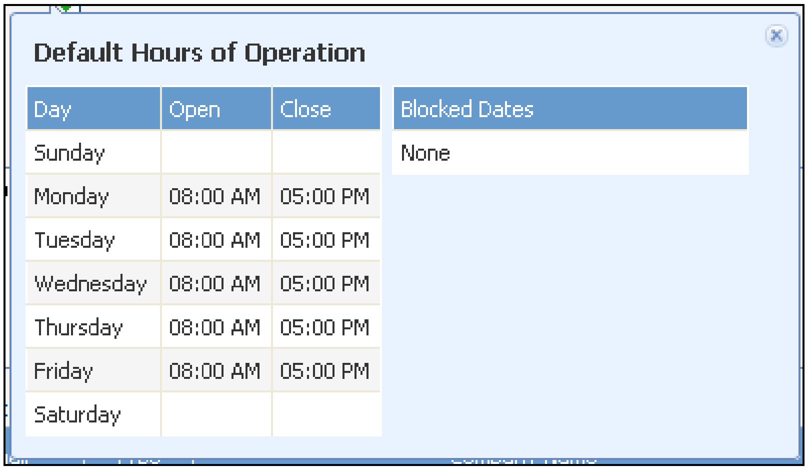
- Hours to base the contract on the number of hours entered for time worked on incidents and changes.
- Work Items to base the contract on the number of incidents and changes created for the associated customer, asset, or company.

Duration Start Interval - Enter the number of days to be added after the current date in the calculation of the date to display by default in the Duration Start field in the Service Contract entry screen.

Duration End Interval - Enter the number of days to be added after the current date in the calculation of the date to display by default in the Duration End field in the Service Contract entry screen.

Make Available to Support Representatives - Select this checkbox to include the service contract template in the list of templates available for selection in the Service Contract entry screen.

Hours of Operation - Select the Hours of Operation definition that has the time frames in which the contract should be in effect; incidents and/or changes will be counted against the contract during the these time frames. Click the Hours of Operation link to display details on the selected definition.


Default Hours of Operation

Day	Open	Close
Sunday		
Monday	08:00 AM	05:00 PM
Tuesday	08:00 AM	05:00 PM
Wednesday	08:00 AM	05:00 PM
Thursday	08:00 AM	05:00 PM
Friday	08:00 AM	05:00 PM
Saturday		

Blocked Dates
None

Use the Create New and View/Edit icons to access the Hours of Operation screen.

Send Expiration Reminder - Select this checkbox to enable the Expiration Reminder checkbox in the Service Contract screen by default. An Expiration Reminder is a notification that the contract is about to expire. The notification will be sent according to the value specified in the applicable Threshold Value or Days Before field. Recipients are specified on the Notifications tab.

Threshold Value - Enter the number to display by default in the Threshold Value field in the Service Contract entry screen. This value is the number of hours or incidents and/or changes to be reached before triggering the Expiration Reminder notification to be sent.

Days Before - Enter the number to display by default in the Days Before field in the Service Contract entry screen. This value is the number of days before the Duration End date in which to trigger the Expiration Reminder notification to be sent.

Comments - Enter text to display by default in the Comments field in the Service Contact entry screen.

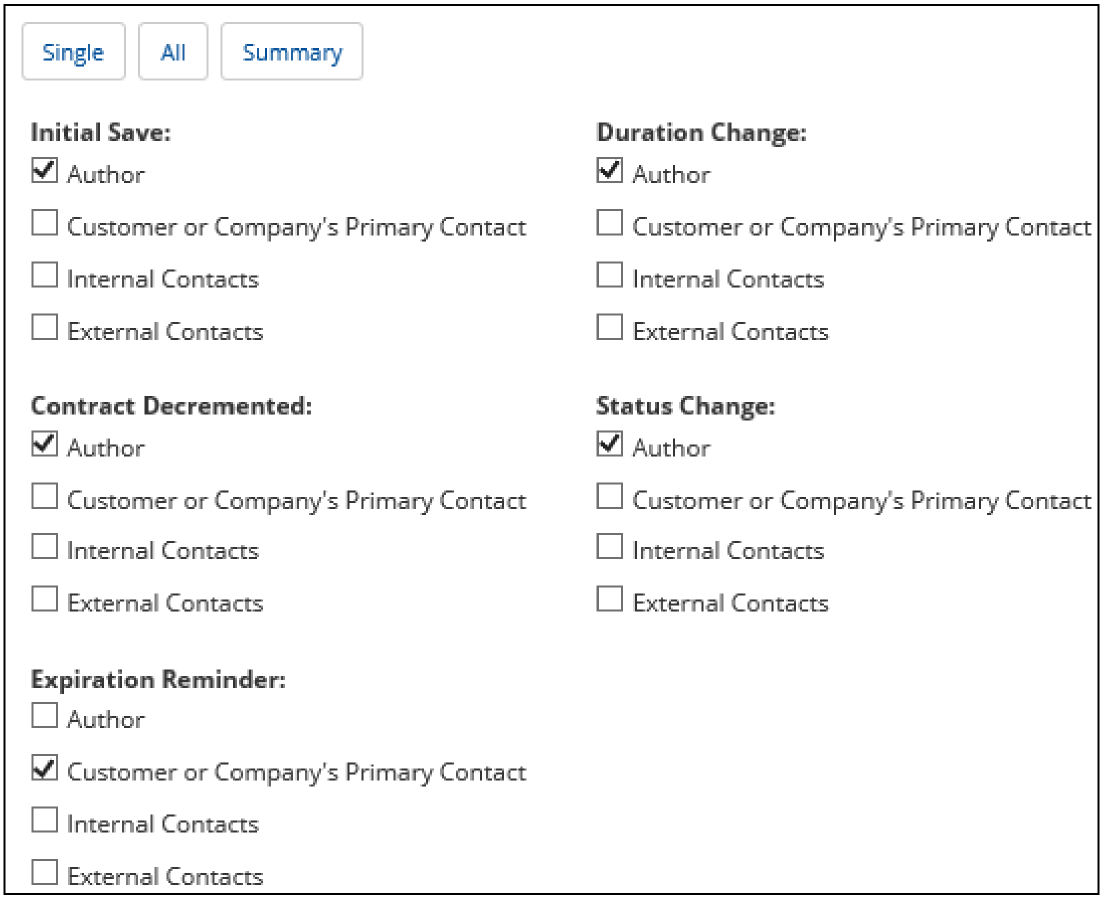
Selecting Contacts

Internal Contacts - Select customers, companies, and/or support representatives to populate the Internal Contacts field in the Service Contract entry screen. Internal contacts can be selected as recipients for service contract notifications.

External Contacts - Select customers, companies, and/or support representatives to populate the External Contacts field in the Service Contract entry screen. External contacts can be selected as recipients for service contract notifications.

Configuring Notifications

Use the Notifications tab to populate the Notification Events field in the Service Contract entry screen when the template is selected. These settings will override any defaults set via the Notifications tab in the Service Contract Basics Configuration screen.



Initial Save - Select one or more recipients to notify when a service contract is initially saved.

Duration Change - Select one or more recipients to notify when an entry is made in the Duration fields for a service contract and the record is saved.

Contract Decremented - Select one or more recipients to notify when an incident or change is counted against a service contract.

Status Change - Select one or more recipients to notify when an entry is made in the Status field for a service contract and the record is saved.

Expiration Reminder - Select one or more recipients to be sent a notification that the contract is about to expire.

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