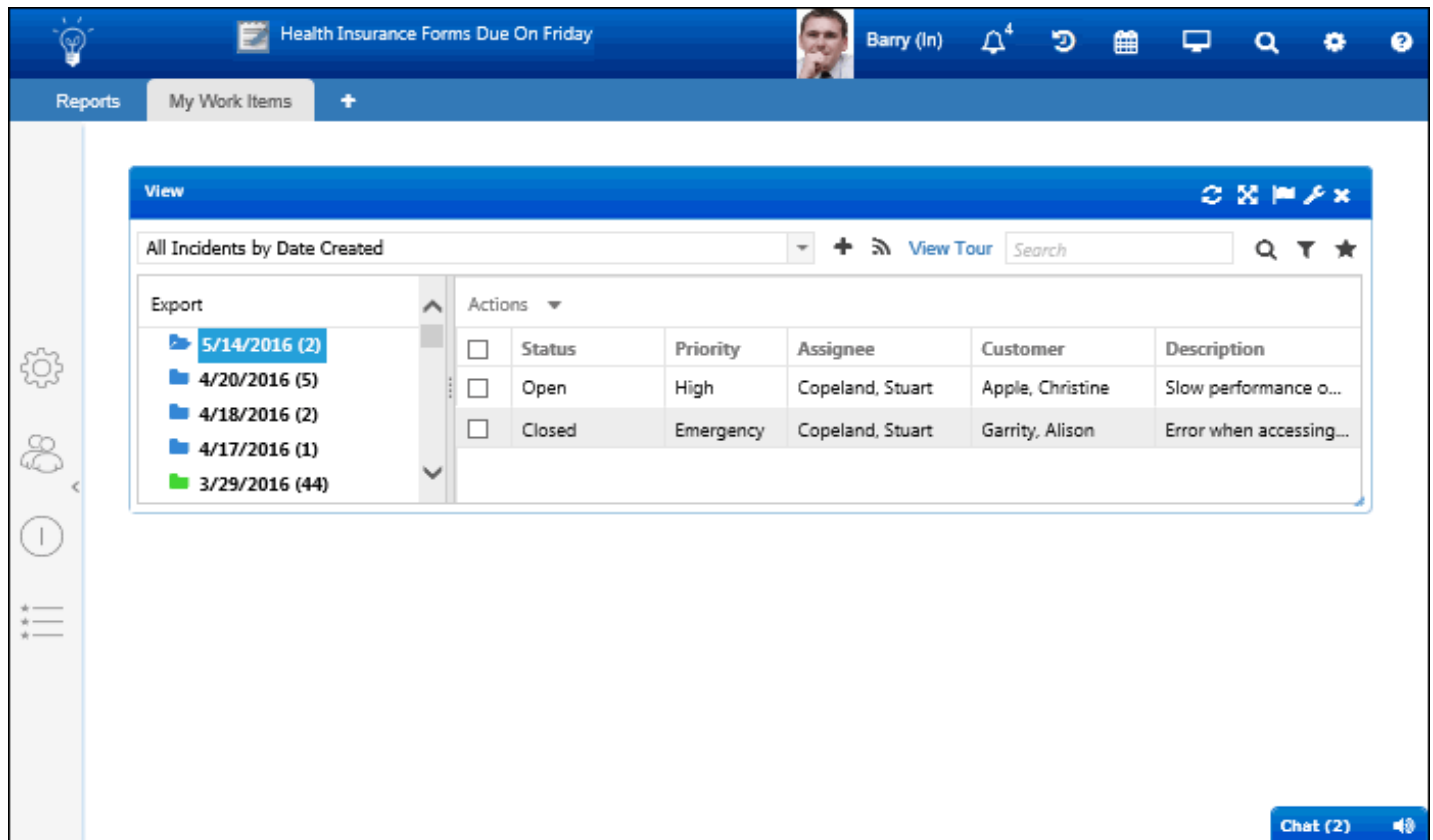





Using the iSupport Desktop

Overview


The iSupport Desktop provides access to all iSupport functionality, including customizable personal and shared dashboards with components for viewing and monitoring iSupport data, configuration access, and more.

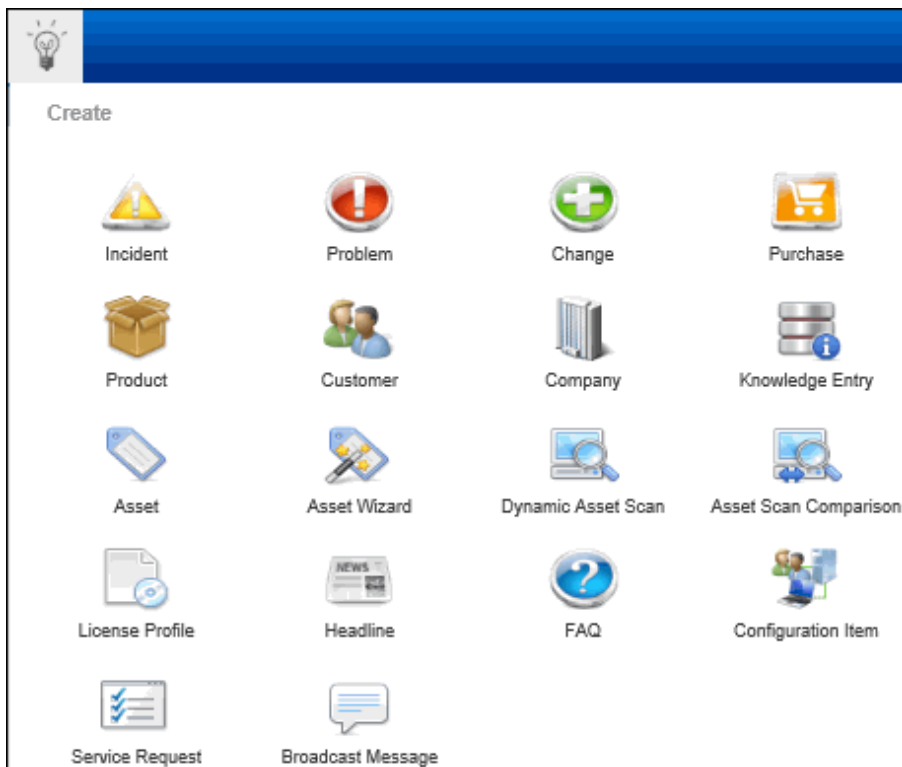


- Click the **Create menu**  icon to access to all of iSupport's entry screens. See the next section for more information.
- Use the **icons on the top right** to set preferences, display desktop notifications, search, and access the configuration module and help. See ["Using Desktop Header Icons" on page 2](#) and ["Setting Preferences" on page 51](#).
- **Chat with other support representatives.** See ["Using Chat" on page 7](#).
- Add and name **dashboards** and include **components** for viewing, reporting, and monitoring iSupport functionality. See ["Working With Dashboards" on page 11](#) and ["Adding and Using Components" on page 14](#) for more information.
- Add **quick access icons for commonly used actions**. See ["Configuring the Desktop Quick Access Section" on page 53](#).
- Access **Preferences** on the Profile menu for setting options for your calendar, notifications, quick access icons, views, signature block, personal rules and correspondence, and more. See ["Setting Preferences" on page 51](#)
- Administrators can configure the following **desktop settings**: dashboard element colors, header text, available Desktop components, and the record types/features involved in global searches performed by all support representatives. See ["Configuring iSupport Desktop Settings" on page 58](#).

Note: Functionality may not appear for support representatives if permissions are enabled in the Configuration module.

Using the Create Menu

Use the Create menu  icon to create work items, start an asset scan or scan comparison, and send a broadcast message. Note that if you don't have permissions to access functionality, its icon will not appear. The Problem, Purchase, Product, Change, Service Request, Service Contract, Configuration Item, and Opportunity entries only appear if you have the Service Desk edition.

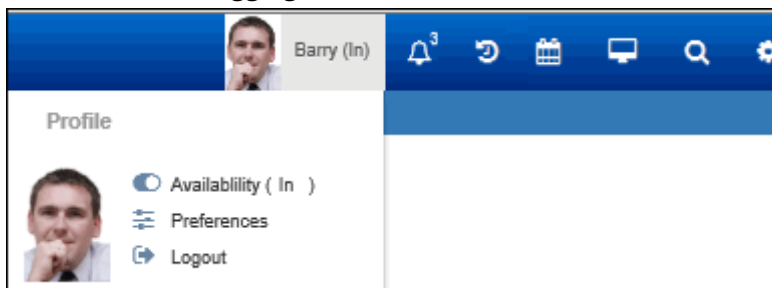


See [“Adding and Using Components” on page 14](#) for more information.

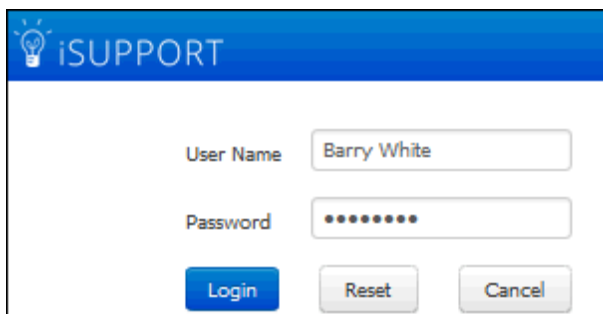
Using Desktop Header Icons

Use the icons to the right of the Desktop header to do the following:

- Click on the **Profile icon** (your avatar/name/availability) to display a menu containing links for changing your availability, accessing preferences, and logging out.




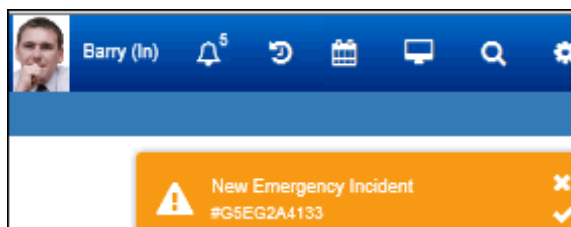
Log in and out - Use the Logout option on the Desktop menu to log off of the Desktop and display the iSupport Login screen.

The image shows the iSupport login dialog. It has a blue header with the iSupport logo. Below the header, there are two input fields: 'User Name' with the text 'Barry White' and 'Password' with masked characters. At the bottom, there are three buttons: 'Login' (blue), 'Reset' (grey), and 'Cancel' (grey).

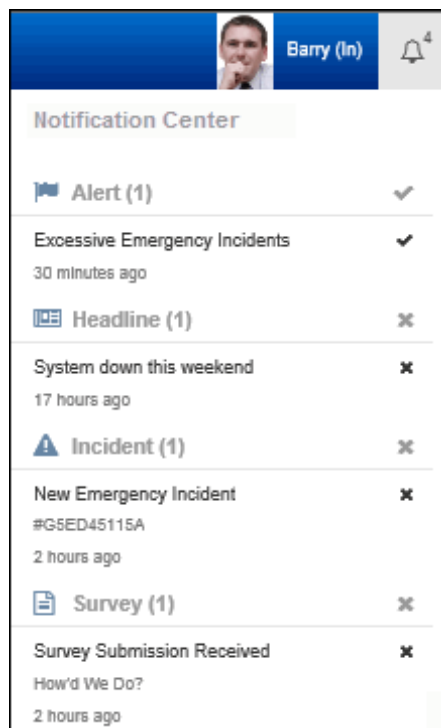
In the Login dialog, use the Reset button to clear the User Name and Password fields. Your user name and password are set up in your Support Representative Profile record, and you can change your password via the Preferences option. A Forgot Password link, password expiration after a specified number of days, a previous password check with a specified number of previous passwords, and minimum password requirements can be configured via the Rep Security screen in the Configuration module. You can also force a password reset for all support representatives and enter text to appear at the bottom of the login dialog.



Note: The Password field in the Login dialog is case sensitive. Selecting Out will exclude (for routing purposes) a support representative from all of the groups in which the support representative is assigned. However, it will not prevent assignment if a support representative is the default owner of incidents submitted via a mySupport portal, an incident or change (if enabled) template, or email-submitted incidents.

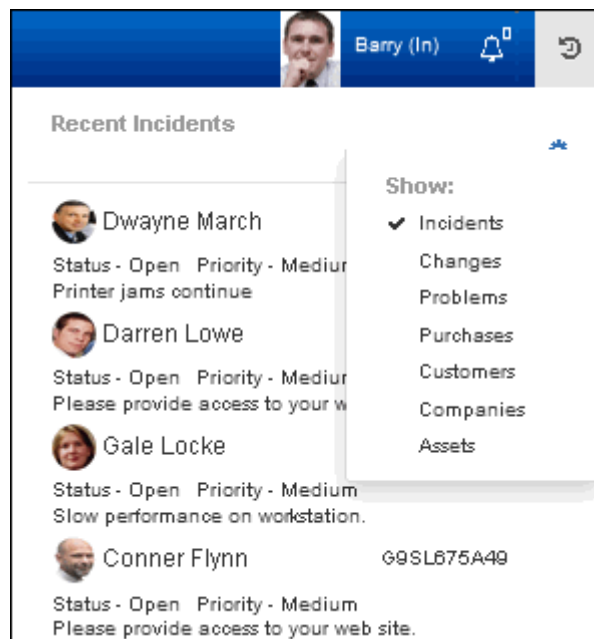
- Use the **Notification Center**  icon to display a list of notifications configured via the Rules, Alert Designer, and Headline screens. Options on the Desktop Notification Center tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry; see [“Setting Preferences” on page 51](#). An example of a desktop notification popup is shown below:




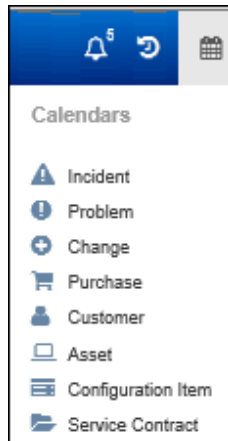
An example of the dropdown is shown below.




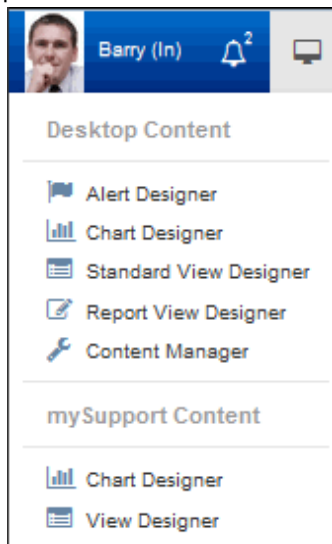
- Use the Recent Items  icon (next to the Notification Center icon) to access a drop-down list of the ten most recently accessed work items of a specified type; use the Show  icon to select the type of work item to display in the list.





- The **Calendars**  icon will appear if Microsoft Office Outlook Calendar and/or Google Calendar Integration is enabled; you can select calendars with meetings scheduled via iSupport entry screens for work items.

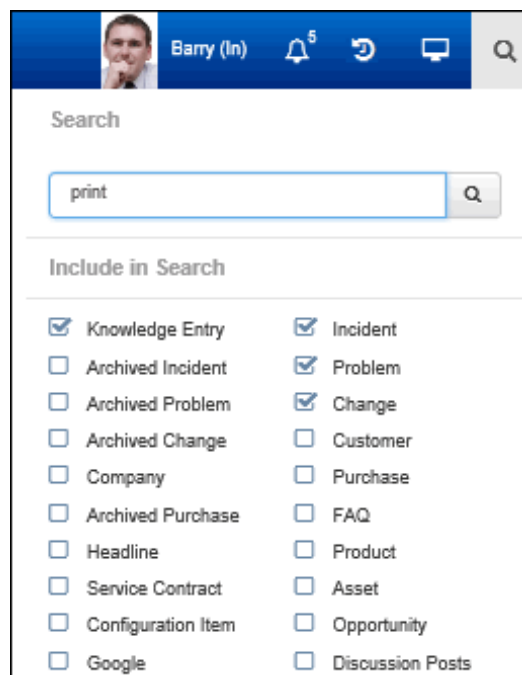


- Use the **Desktop Content**  icon to access the Alert, Chart, and Standard and Report View Designers, as well as the Content Manager. See the online help for more information on all of these options.

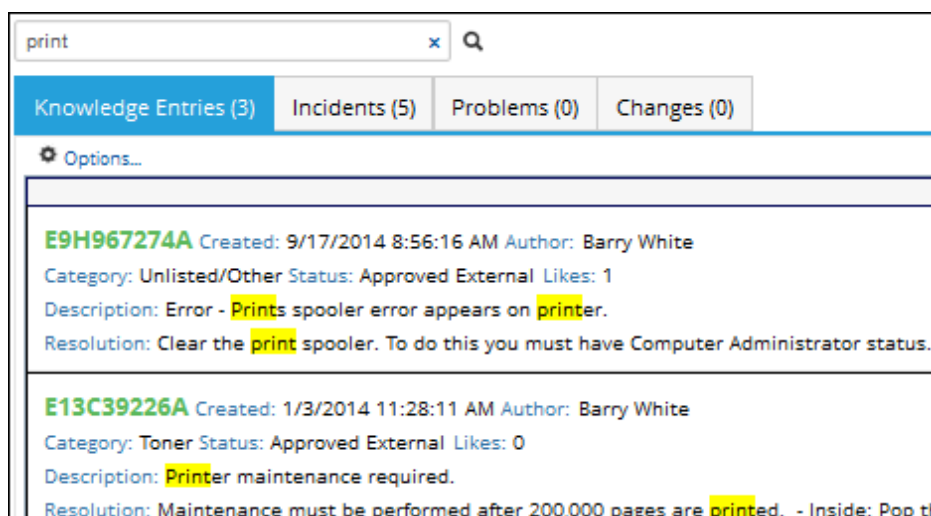



- Use the **Search**  icon to search iSupport data using keywords and, if searching knowledge, Boolean operators (And, Or, Not as well as parenthesis to group words and phrases). After entering the search text, select the types

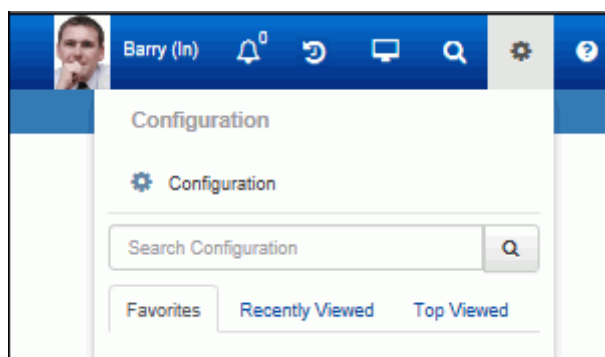
of records to search and then click the  icon to initiate the search. Google can be included if configured in the Google Search Integration screen.





Search results will appear as in the example below. Use the Options link on each tab to select the fields to search, the type of search (Starts With, Contains, Ends With and Is), enable text highlighting, and select the type of view in which search results are displayed (list or classic).

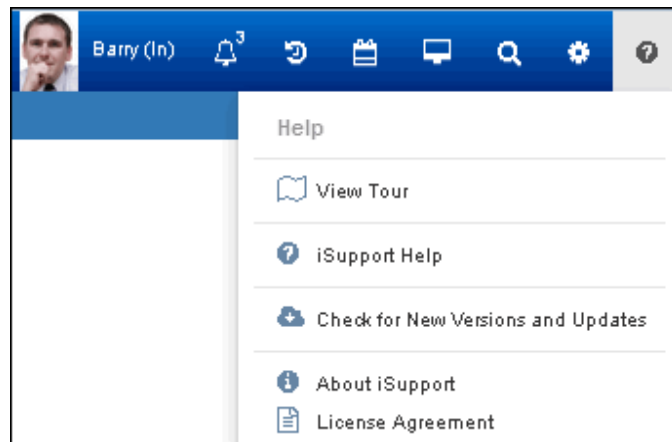


- Use the Configuration  icon to access the Configuration module as well as Search, Favorites, Recently Viewed, and Top Viewed configuration screens.



- Use the Help  Desktop menu to open a menu for accessing iSupport documentation, displaying the iSupport license agreement, and checking the version of your iSupport application, and more. the Online Help

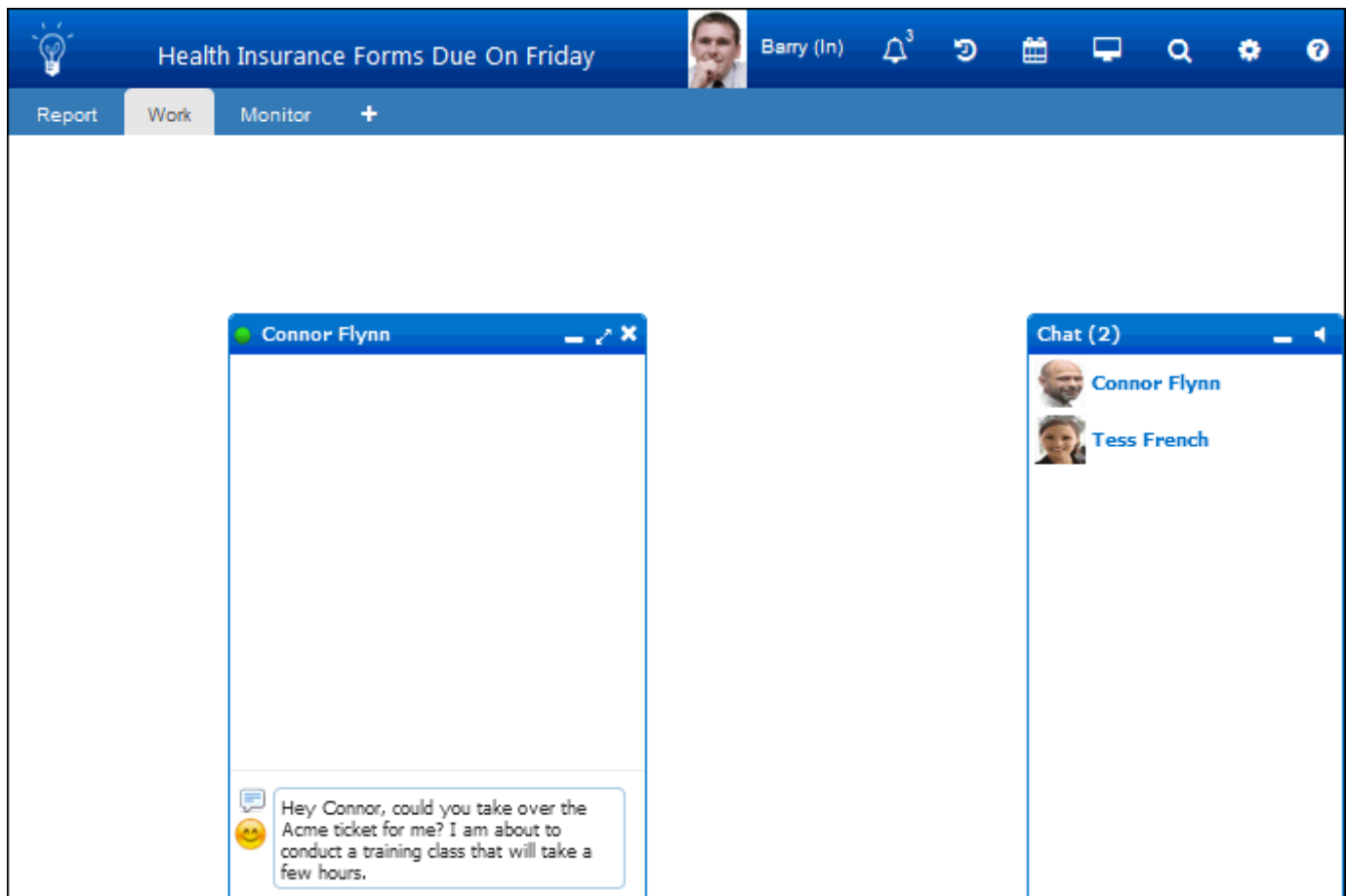
option includes overviews and context-sensitive help topics for iSupport; configuration overview pages contain links to comprehensive PDFs that cover features by work item type. The help system is installed in the Help/CSH directory under the directory in which the Desktop is installed. You can click the Help  icon in entry screens to display a comprehensive help topic with information on the functionality in that screen.




Using Chat

Chatting With Other Support Representatives

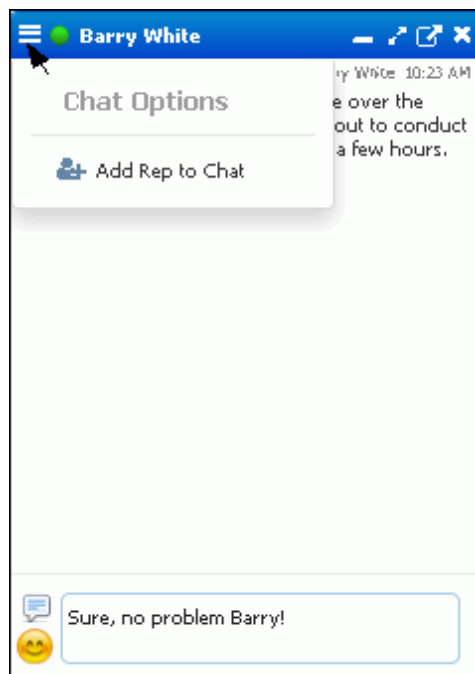
Support representatives can use the Chat window to send messages to each other; on the Desktop messages will appear in a window in the lower right corner of the screen. All logged-in support representatives will be available for chat.



Use the Expand  icon to maximize the chat window.



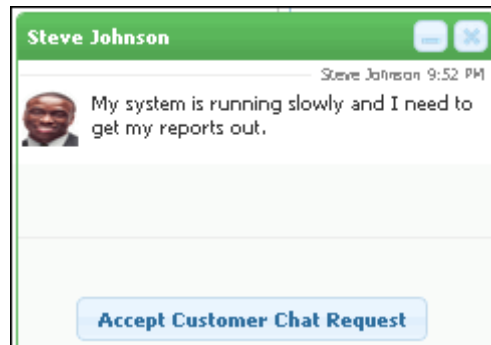
When another support representative accepts the chat, the Chat Options menu will appear with an option to add one or more support representatives to be included in the chat.



Administrators can view chat history via the Options and Tools | Administer | Rep Chat History screen in the Configuration module.

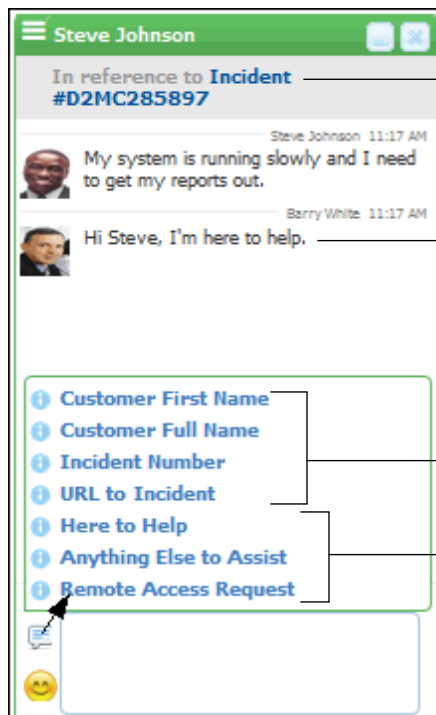
Chatting With Customers Using mySupport

A chat request from a mySupport customer will appear to support representatives that are scheduled to chat (via the Support Representative Group screen). The chat window will have a green header bar and an Accept Customer Chat Request button.



Once accepted, an incident can be created (if configured via the Support Representative Group screen) with the number as a link at the top of the chat dialog for the support representative to open the incident. The configured response will display to the customer. The following will be included in the entry area:

- The Emoji 🗨️ icon which will display a menu of emoticons for use in responses.
- The Chat Responses 🗨️ icon which will display include fields and the responses defined in the mySupport Chat Responses configuration screen. The include fields can display the first and full name from the customer's profile or initial entry dialog (if not authenticated), as well as the number and URL of the incident created when the chat is accepted. Chat responses will overwrite any existing text in the entry area; include fields will append values to existing text.



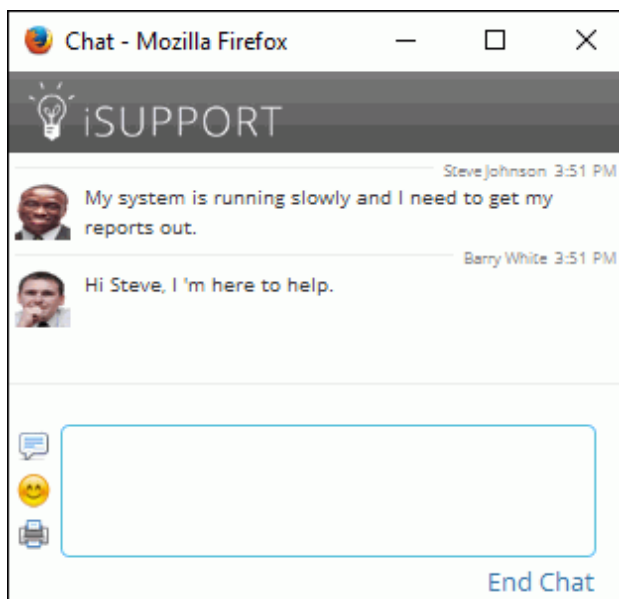
Click to display incident created after chat request is accepted

Initial response configured on the Chat tab in the Support Representative Group screen


Include fields for adding the first and full name from the customer's profile or initial entry dialog (if not authenticated), as well as the number and URL of the incident created when the chat is accepted

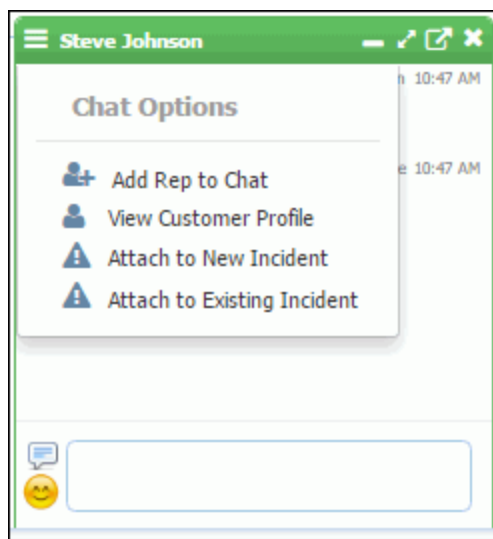
Chat responses configured in the mySupport Chat Responses screen

- For customers, a Print Chat Transcript  icon. The customer chat window is shown below.

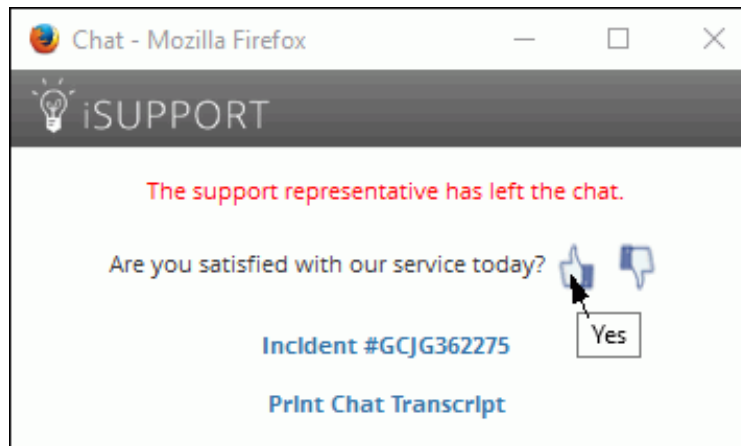


Rep Chat Options Menu

Support representatives can use the Options  menu in the chat window to select other support representatives to be included in the chat and open the customer's Profile record. If incidents are not configured to be created automatically, options will be included for adding the chat transcript to the history of a new or existing incident.



When the support representative ends the chat, a feedback question can be configured to display in the customer's chat window. Note that the text in red that appears after the support representative ends the chat is also configurable.



After selecting a response, another dialog will appear for entering any comments.

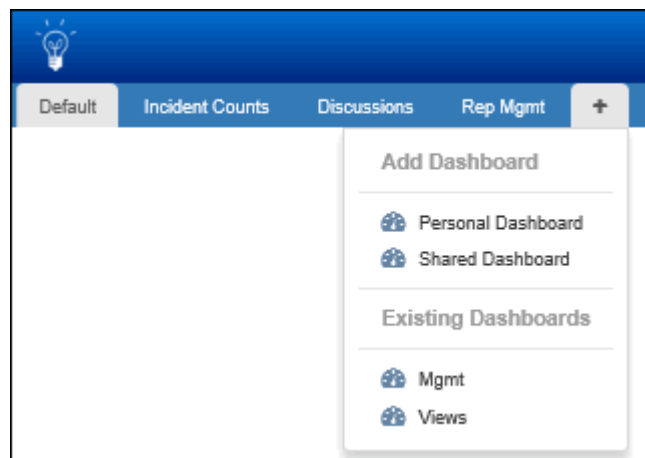


See the online help for configuration information.

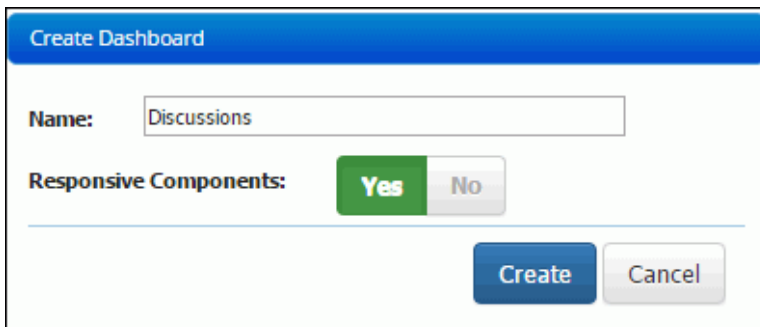
Working With Dashboards

Dashboards are tabbed spaces on the Desktop that you can label and add components to. Access to dashboards can be personal or shared; a personal dashboard will display only to the support representative who created it, and an existing shared dashboard can be added by other support representatives. Configured permissions will determine whether you can create, edit, and delete a personal or shared dashboard. Restricted access can be configured; see ["Setting Dashboard Access" on page 13](#).

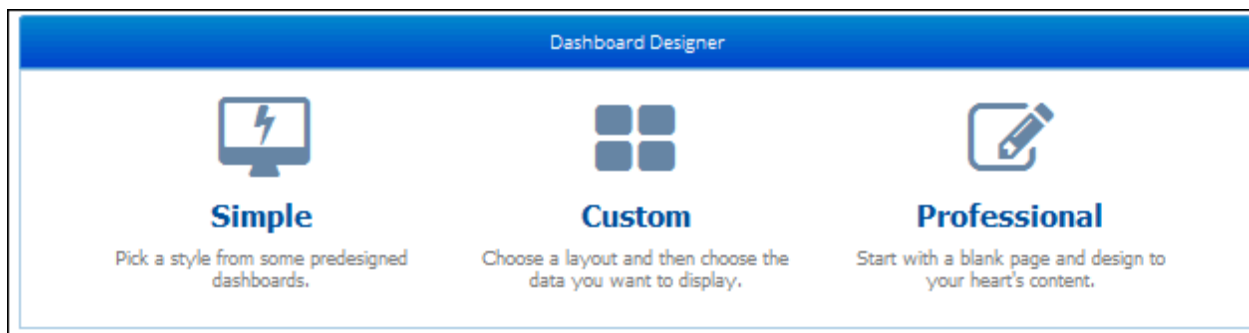
Use the Add Dashboard  icon to add a personal or shared dashboard, or an existing dashboard, to the Desktop.



In the Create Dashboard dialog, enter a name for the dashboard and, if applicable, select Yes in the Responsive Components field to enable component widths to automatically adjust and display complete component frames. Horizontal scroll bars will be added to the content within each component frame when needed.

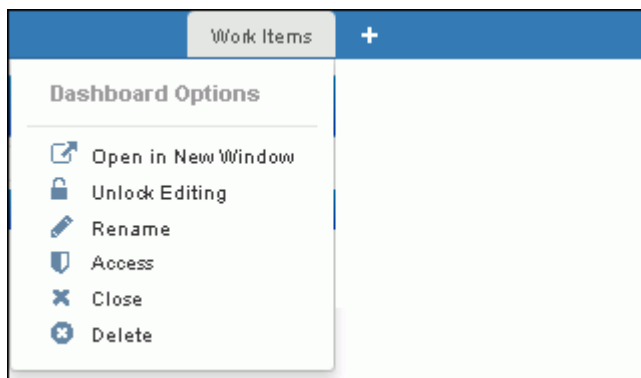
A dialog box titled "Create Dashboard" with a blue header. It contains a "Name:" label followed by a text input field containing the word "Discussions". Below this is a "Responsive Components:" label followed by two buttons: "Yes" (highlighted in green) and "No" (grey). At the bottom right are two buttons: "Create" (blue) and "Cancel" (grey).

A Dashboard Designer will appear when creating a personal or shared dashboard; it includes options with predefined dashboards and component layouts.

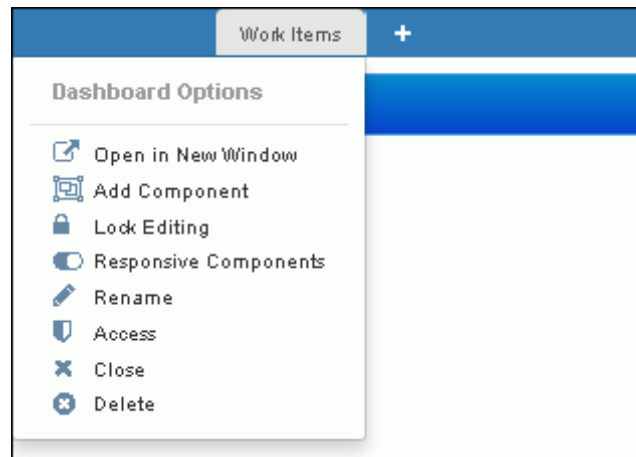
A "Dashboard Designer" window with a blue header. It features three main options, each with an icon and a description: 1. "Simple" with a monitor icon and a lightning bolt, described as "Pick a style from some predefined dashboards." 2. "Custom" with a 2x2 grid icon, described as "Choose a layout and then choose the data you want to display." 3. "Professional" with a notepad and pencil icon, described as "Start with a blank page and design to your heart's content."

Right-click on a dashboard tab to display a menu of dashboard options.

If you have added or created a **shared** dashboard, it will be **locked** by default to prevent anyone from editing it. Select **Unlock Editing** on the Dashboard Options menu to make changes; the dashboard will reload for anyone else using it after an edit is made.

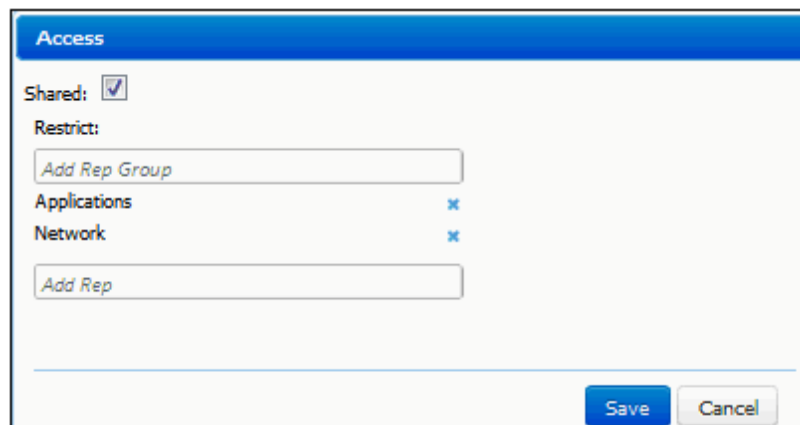
A screenshot of a dashboard interface. At the top is a blue bar with a tab labeled "Work Items" and a "+" icon. Below this, a "Dashboard Options" menu is open, listing several actions with corresponding icons: "Open in New Window" (window icon), "Unlock Editing" (lock icon), "Rename" (pencil icon), "Access" (shield icon), "Close" (X icon), and "Delete" (trash can icon).

The Lock Editing and Add Component options will appear in the menu after a dashboard is unlocked.



Setting Dashboard Access

The  Access option on the right-click Dashboard Options menu enables you to specify the individual support representative(s) or group(s) that can access the dashboard.



To make the dashboard available for other support representatives to add to their Desktops via the Add Existing dashboard menu option, select Shared. In the fields under Restrict:


- To make the dashboard available only to specified groups, place your cursor in the Add Rep Group field and select the group(s).
- To make the dashboard available only to selected support representatives, place your cursor in the Add Rep field and select the support representatives.

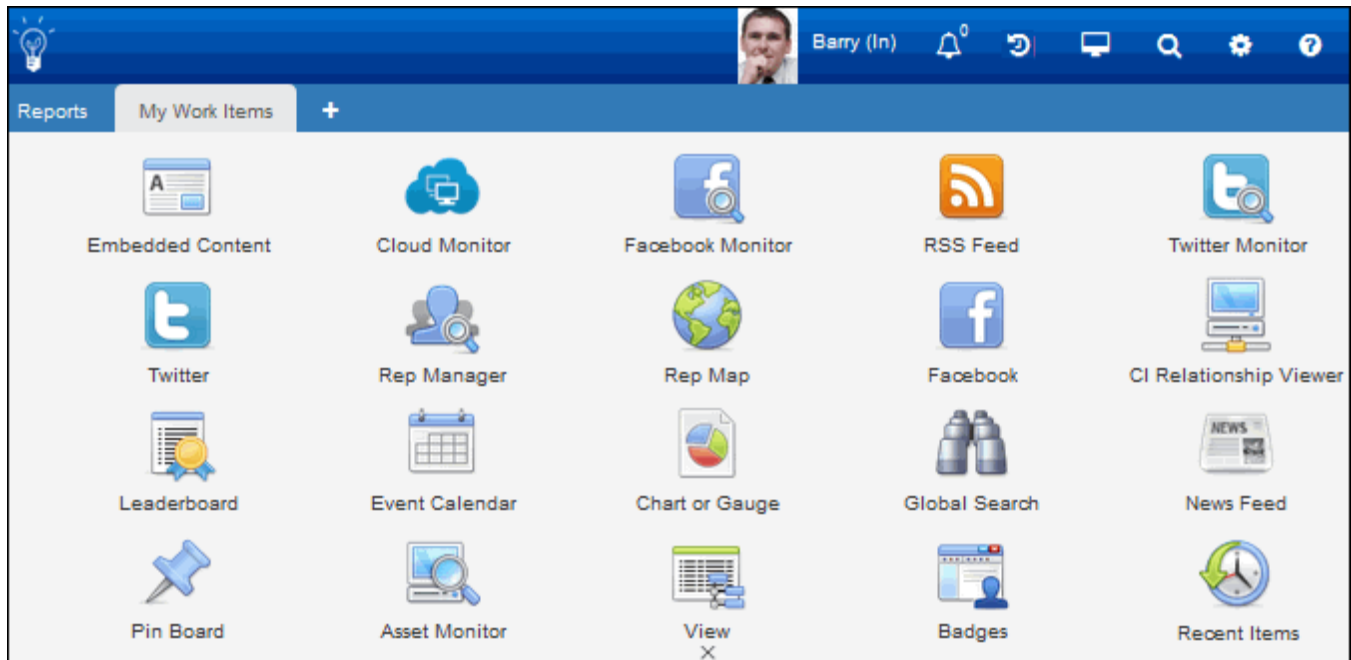
Other ways to control dashboard content:

- To add, delete, and rename dashboards, control dashboard access, and automatically include dashboards on the Desktop of all support representatives, use settings on the Dashboards tab in the Content Manager.
- To push the dashboards associated with the group specified as primary to a support representative's Desktop, add the primary group in the Support Representative Profile screen.
- To view access to shared dashboards for a support representative group, use the Desktop tab in the Core Settings | Groups | Support Representative screen.

Note: The update and refresh of Awareness and Chat functionality, as well as Desktop components, can apply to only four open pages at one time. The message "Awareness and chat not available" or "Auto refresh and chat not available" will appear if this is exceeded. These limitations do not apply if you are using Windows Server 2012 with WebSockets enabled and the current version of iSupport's supported browsers.






Adding and Using Components

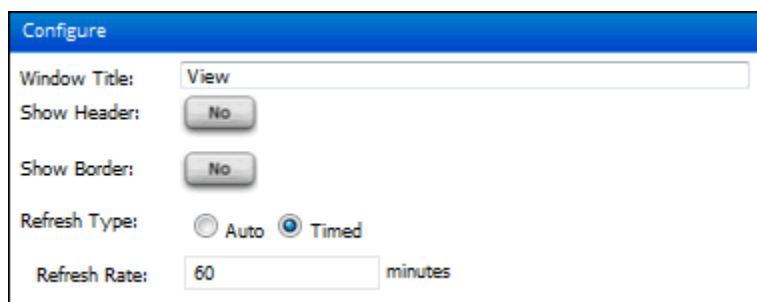
Components are small frames that are placed on a dashboard for viewing, reporting, and monitoring iSupport functionality. Display available components by selecting Unlock Editing and then Add Component on the right-click Dashboard Options menu. Drag the desired component onto the dashboard. When finished, click the  icon at the bottom of the dialog.





Use the Options and Tools | Customize | Dashboard Settings configuration screen to allow and disallow component availability, and the Core Settings | Groups screen to specify available components for members of support representative groups. Note that the Mass Mailing Manager will not appear on the component menu until enabled in the Mass Mailings configuration screen, and some component functionality is dependent on settings in a support representative's profile. For example, the Rep Manager component will not appear to a support representative that does not have the Rep Manager permission enabled in their profile.

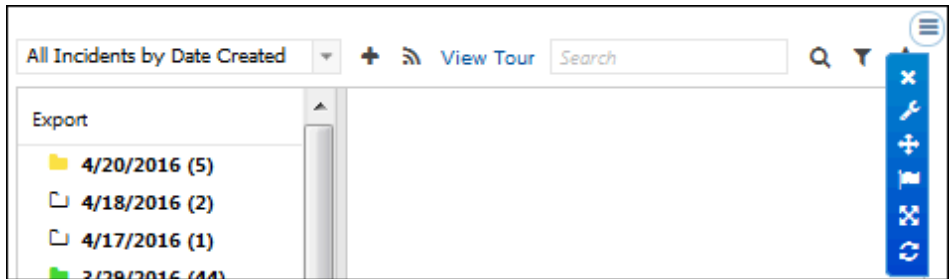
Component Functions

- Resize components via the bottom and right-side borders; you can drag the lower right corner to move both borders at once.
- Use the **Maximize**  icon to display only the component on the dashboard, covering it. The Minimize  icon will appear for you to redisplay the component in a smaller size along with all the other components.
- Use the **Refresh**  icon to redisplay the most current data (iSupport data does not refresh automatically when items are created, changed, or deleted.)
- The **Alert**  icon will appear for the Chart and View components for creating alerts that will appear in a dialog when a view field reaches a certain threshold.
- Use the **Configure**  icon to display options for the component such as enabling and naming the header and enabling/disabling the border.

A screenshot of the 'Configure' dialog box. It has a blue header with the title 'Configure'. The settings are as follows: 'Window Title' is a text field containing 'View'; 'Show Header' is a button labeled 'No'; 'Show Border' is a button labeled 'No'; 'Refresh Type' has two radio buttons, 'Auto' and 'Timed', with 'Timed' selected; 'Refresh Rate' is a text field containing '60' followed by the unit 'minutes'.


The Auto option will refresh automatically when new data is available; the timed interval refresh option will refresh at the rate entered in the Refresh Rate field.

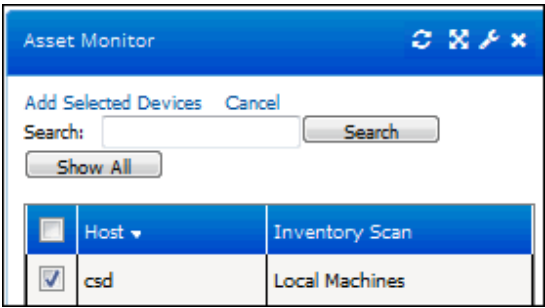
If you disable the header, use the Show Toolbar  icon to display component icons. The **Move**  icon will be included for moving the component.



Asset Monitor

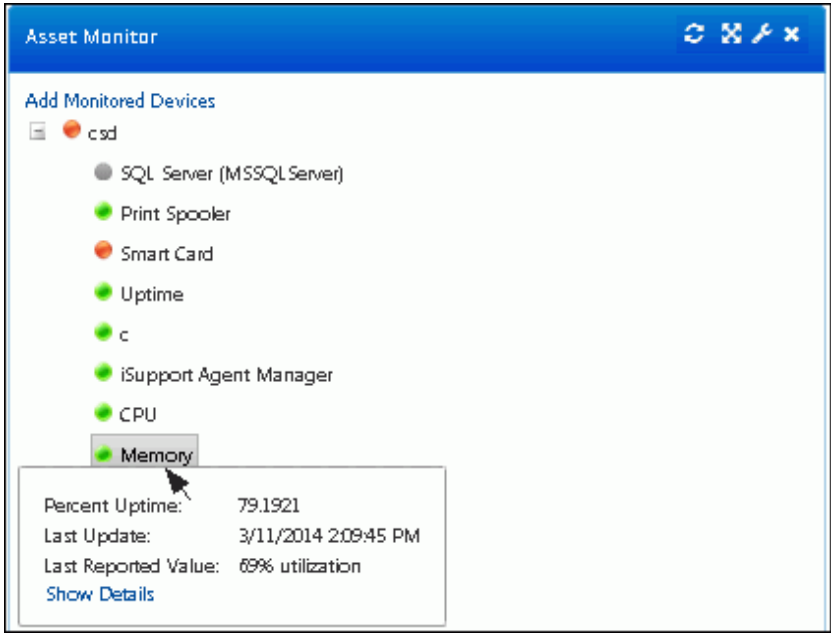
Use the Asset Monitor component to display results of monitoring configured in a scheduled scan and monitoring definition, including the state of devices and their CPU, memory, disk space, and services.

When you add the Asset Monitor  component to a dashboard, an Add Monitored Devices link will appear for you to select the devices to appear in the component. Select the devices in the Host column and then click the Add Selected Devices link.

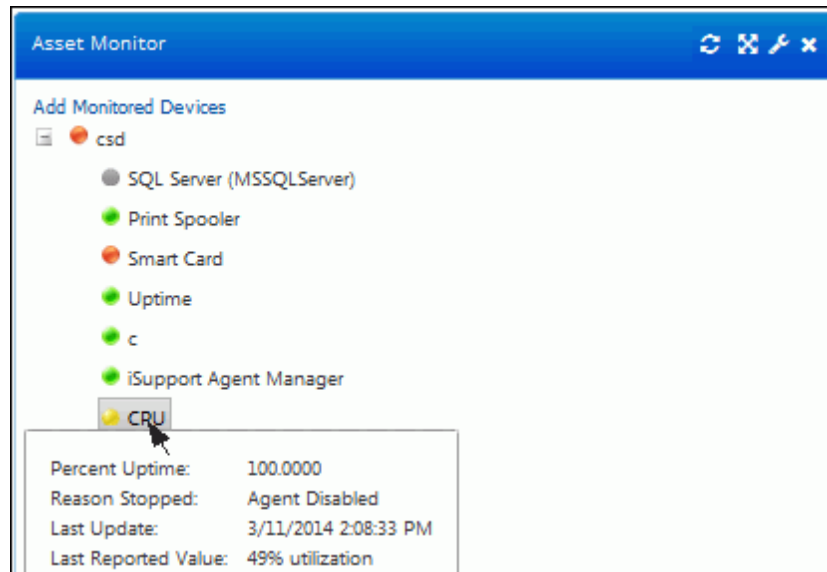


The state of monitored items and devices will be indicated by green, red, yellow, and gray dots; you can display details in a tooltip by hovering over the item or device name.

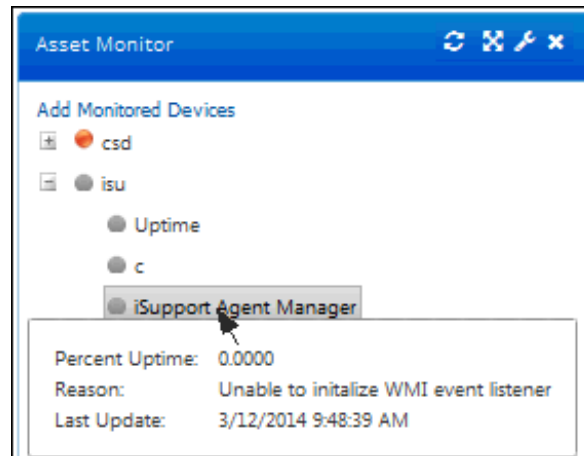
- A green dot will indicate that all monitoring settings in the Asset Inventory Scan and Monitoring Definition are configured correctly, the Asset Inventory Scan and Monitoring agent is working correctly, and the item or device is detected by monitoring and meeting configured thresholds.



- A yellow dot will appear if, after everything has been working correctly as described above, the iSupport Asset Inventory Scan and Monitoring agent or iSupport Agent Manager service has stopped or has been disabled.

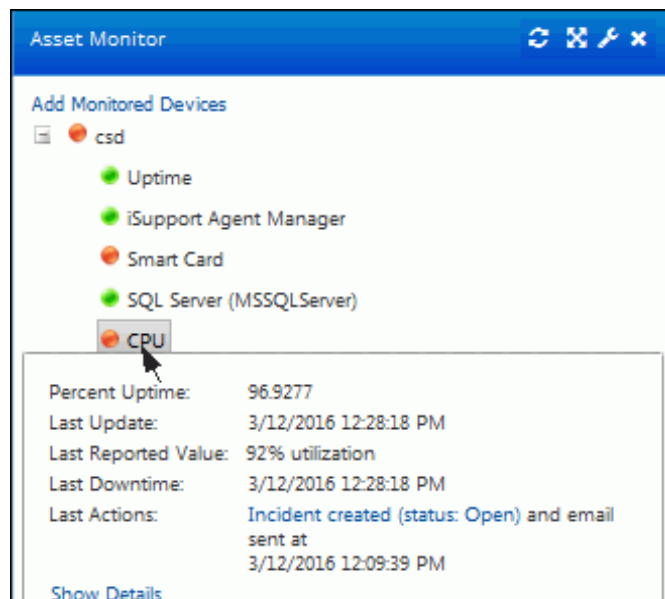


- A gray dot will appear for a monitored item or device on which the WMI listeners cannot be started (for example, if an error occurred with permissions).

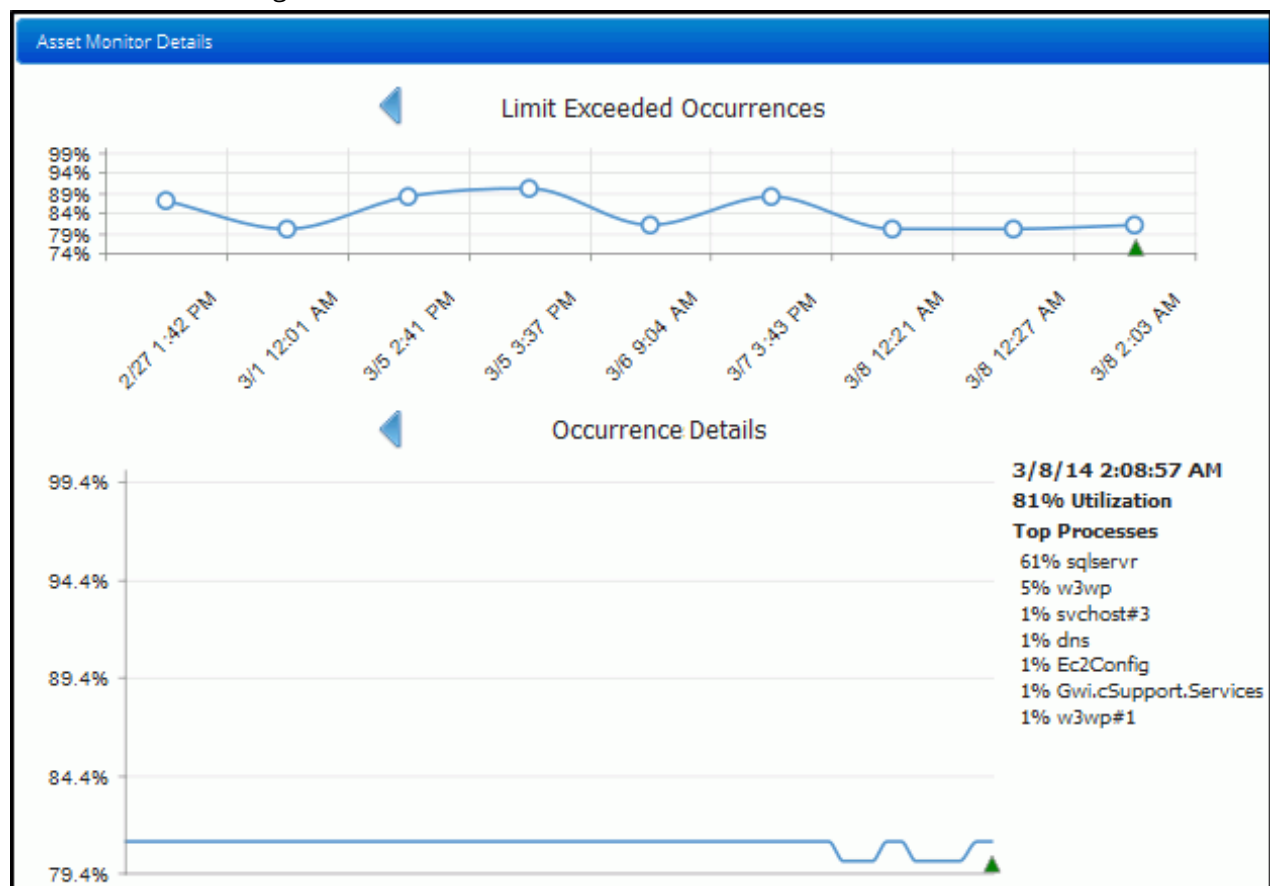


- A red dot will appear if, after everything has been working correctly, a problem occurs with the item or device being monitored such as a service stoppage or a configured threshold that is not met (if any of the configured reporting thresholds are met (a monitored device is off-line or has high memory or CPU utilization, a monitored drive has disk space lower than the specified percentage, or a monitored service has a stopped state). Click the



Show Details link in the tooltip to display a chart of the occurrences at which a configured threshold was exceeded and other details.

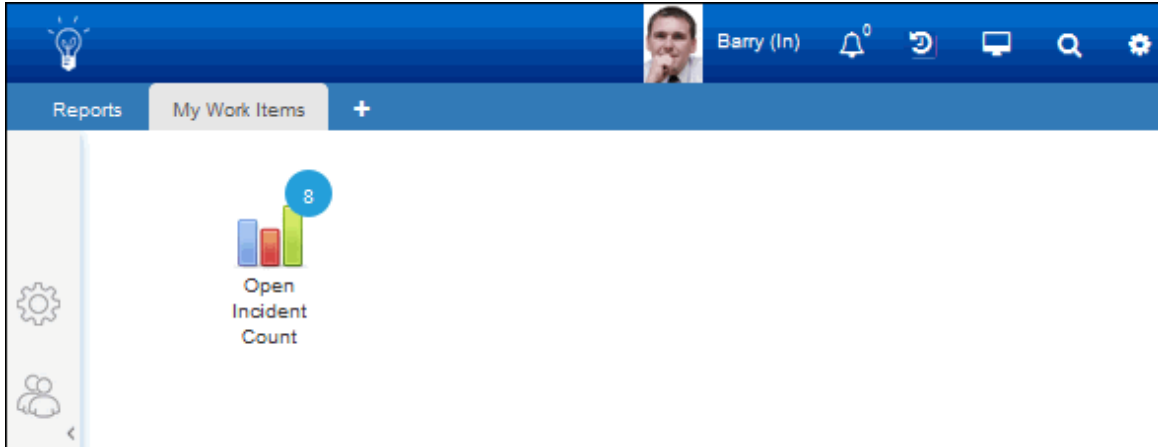


The Show Details link will appear in the tooltip if a configured threshold was exceeded; click it to display a chart of the occurrences at which a configured threshold was exceeded and other details:



Badges

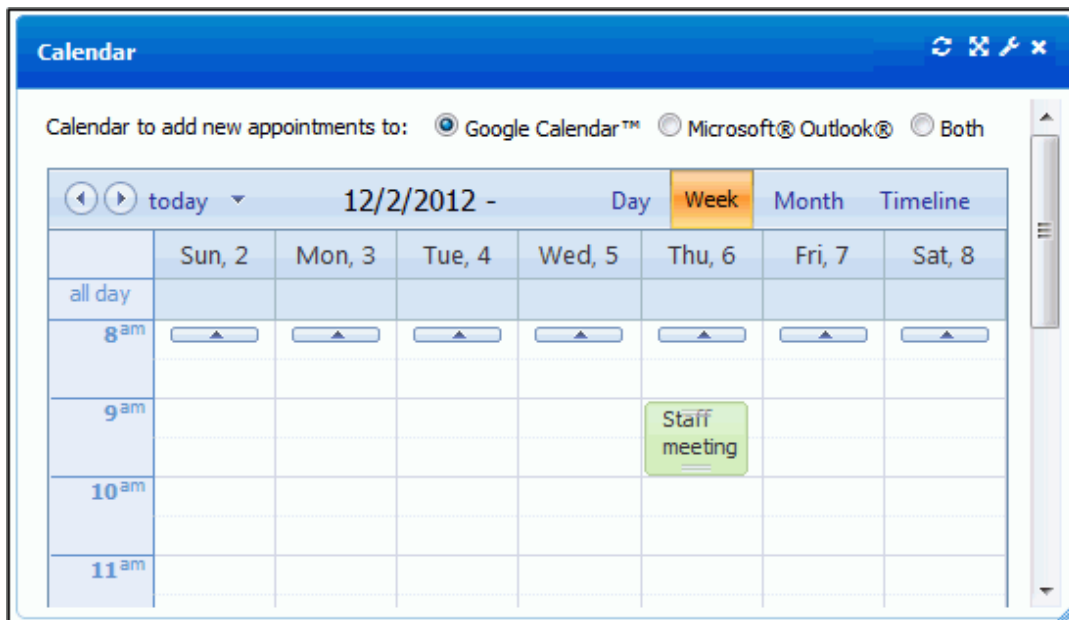
The Badges  component displays a configurable icon with a count of a view field value. You can click on the icon to display the view. To configure the Badge component, start by dragging the Badge component icon to a dashboard. A larger New Badge icon will appear; click the gear  icon to configure the icon and criteria for the count.



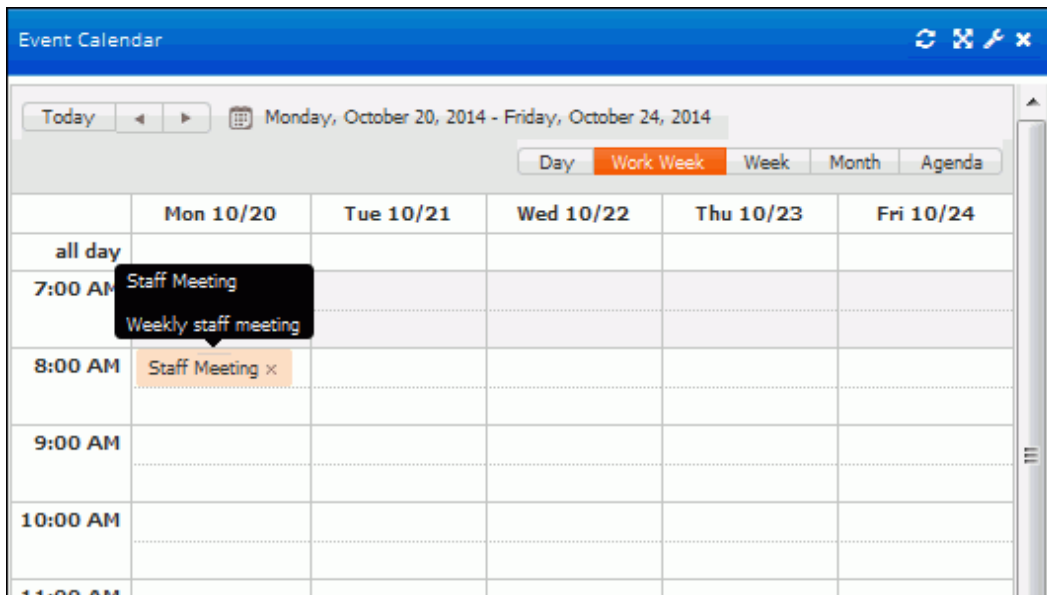
Calendar

The Calendar  component displays:

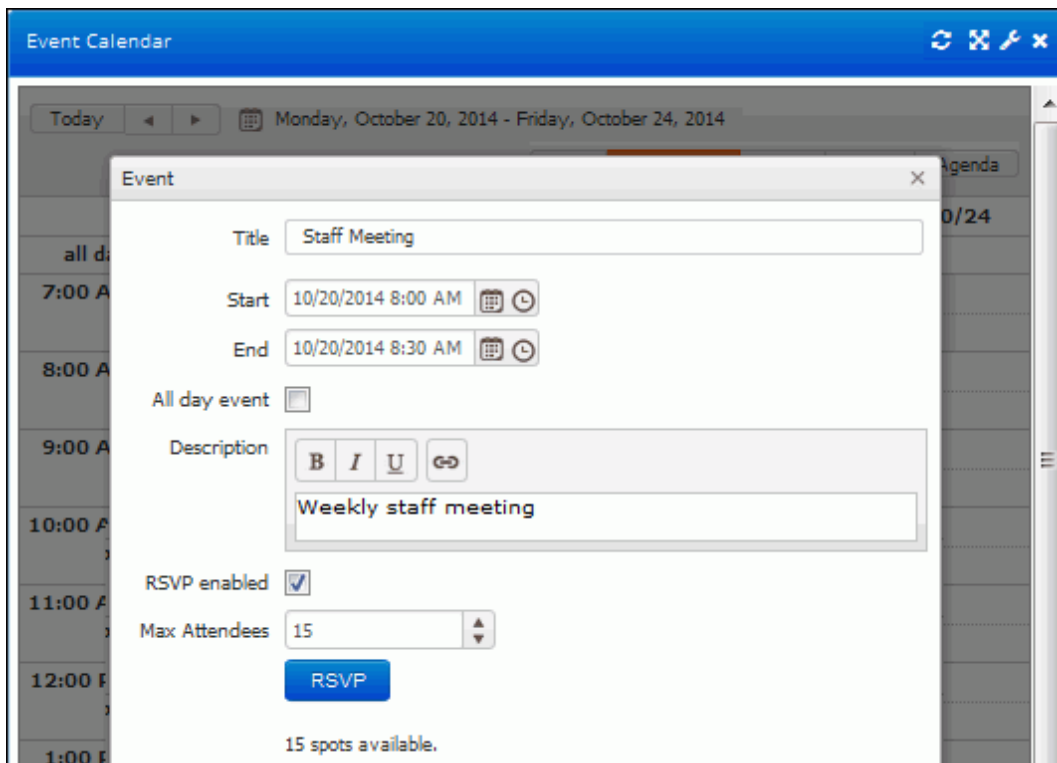
- A Google calendar or Microsoft Outlook calendar configured in the Calendar Integration screen. Note that you will need to use the fields on the Details tab in the Preferences dialog (accessed via the Desktop menu) to enable access to your calendar(s) and set the work day hours during which you are available to be scheduled via iSupport.



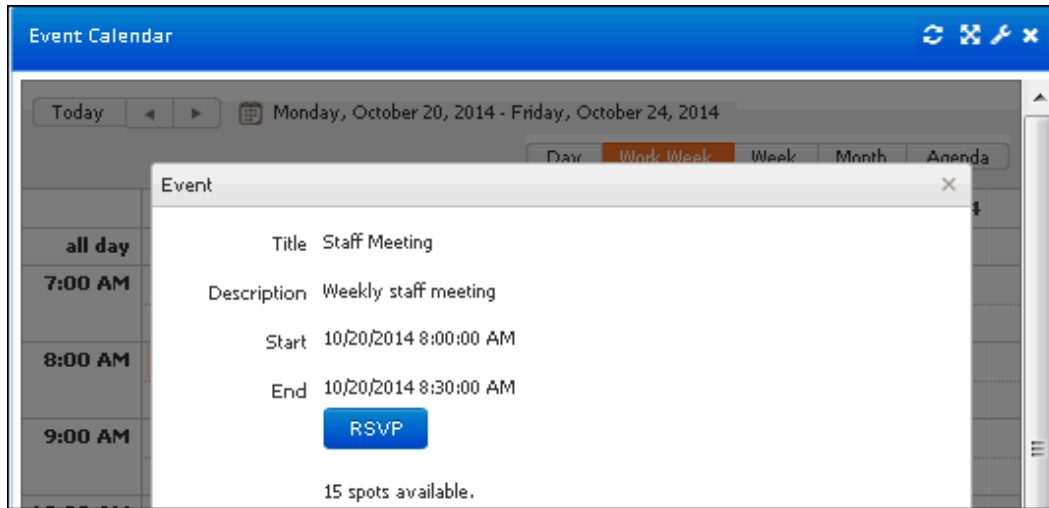
- An event calendar configured in the Event Calendar screen. Event calendars can be used for support representatives and customers to create and view meetings and submit an RSVP (if configured).




Support representatives with edit access can double-click on a meeting to display and modify event details. A maximum number of attendees can be set for a meeting; the RSVP button will appear if enabled and the maximum number of attendees has not been reached.




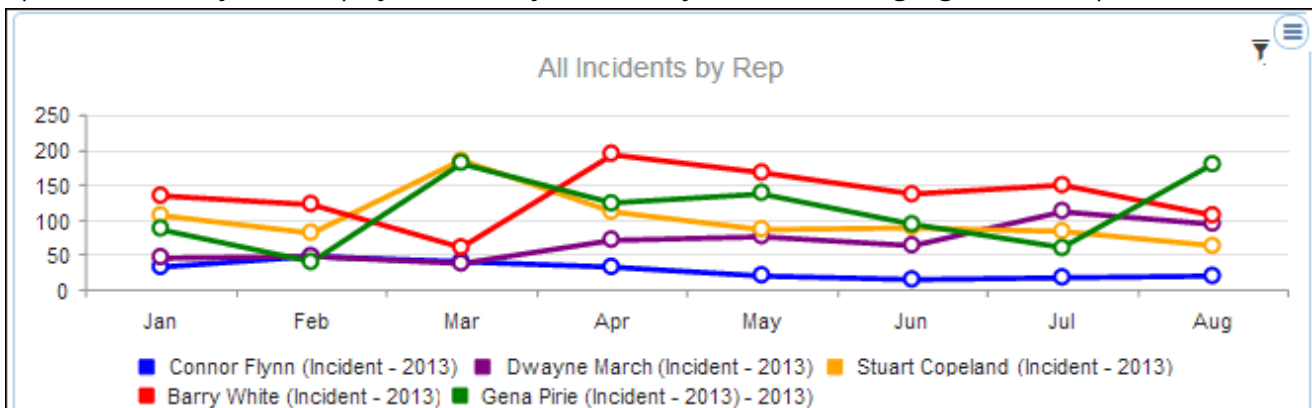
Event details will appear as shown below to support representatives with no edit access:








Chart

Use the Chart  component to display an area, bar, column, line, pie, or scatter chart configured via the Chart Designer; see the online help for more information. If Opportunity functionality is enabled in the Enable Features screen, you can configure funnel-type charts via the component configuration dialog. Two types of Desktop charts can be configured via the Chart Designer: Rep charts and Rep Work Item charts.

- Rep Work Item charts enable you to display data in area, stacked area, bar, stacked bar, column, and stacked line format for tracking incidents, problems, changes, and purchase requests for a specified time frame. You can set colors and multiple chart parameters and time frame types such as quarterly and yearly trending. (Configured Rep Work Item charts will appear in the component configuration  dialog in a Work Items folder.)
- Rep charts enable you to display data on any view field; you can create a gauge, bar, line, pie, or area chart.




To remove an item in the chart, click on the item label in the chart legend.

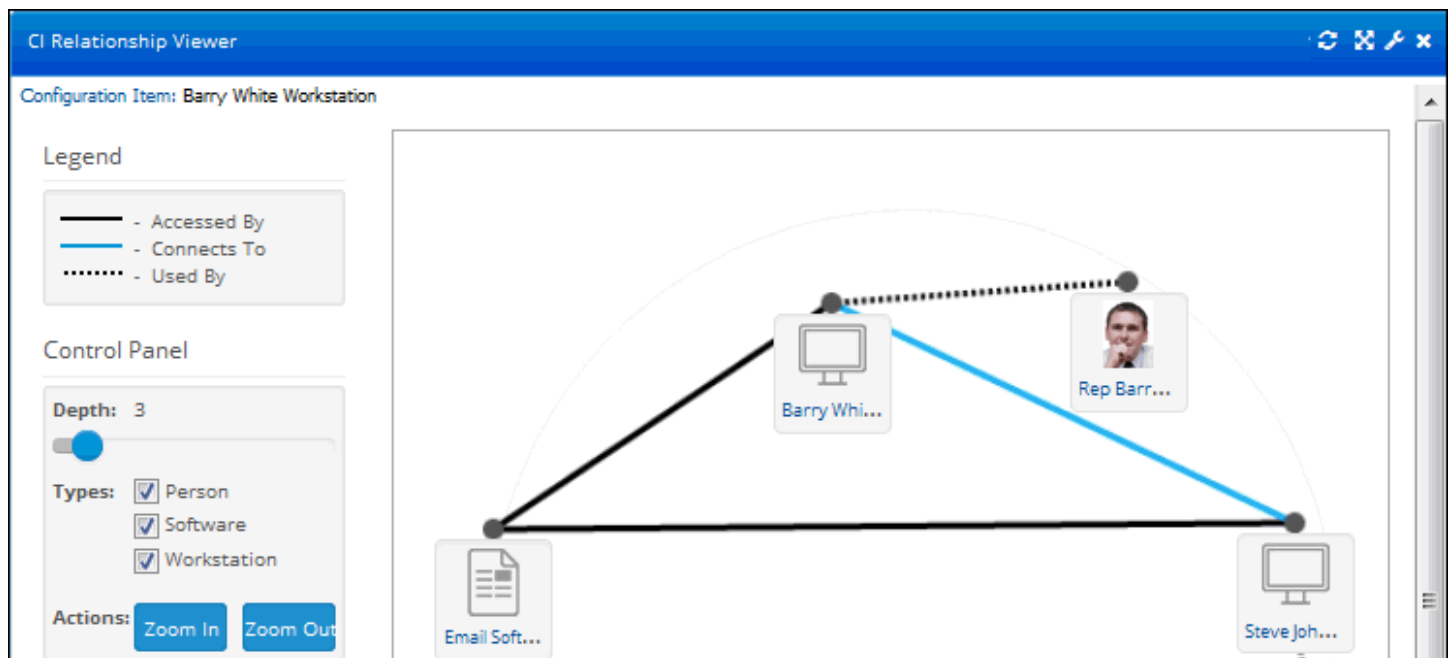
Click the **Advanced Search**  icon to set criteria for filtering data in a chart. Use the Match *<All/Any>* field to specify whether you want **every** *<field>* *<comparison method>* *<value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition  and Remove Condition  icons to display and remove a *<field>* *<comparison method>* *<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. Click the Save button to enter a name for the search and save it. The Saved Searches ★ icon will display; hover over it to display saved searches.




CI Relationship Viewer

The CI Relationship Viewer  component graphically displays the configuration items related to a specified configuration item. You can click on a configuration item name to open a record and reposition by dragging icons. Use the options in the Control Panel to display different depth levels, select the types of configuration items to display, and zoom.



Cloud Monitor

If you use Amazon Web Services (AWS) to host your iSupport instance, you can view billing details in the Cost Allocation Report via the Cloud Monitor  component. The component will display the current month's billing details for the resources that match a configured instance tag. All charges related to the instance (including EC2, EBS,

Data I/O) will appear, including billing details for the past month. Use the Options and Tools | Integrate | Cloud Integration screen to configure the report.

Cloud Monitor				
Cost Allocation Reports: aws-cost-allocation-2014-03				
Description	Usage Quantity	Cost Before Tax	Tax Amount	Total Cost
Amazon Elastic Compute Cloud				
\$0.364 per M1 Standard Large (m1.large) Windows instance-hour (or partial hour)	206.50	\$75.16	\$6.31	\$81.48
Standard Large Instance (m1.large) Windows instance-hours used this month	206.50	\$0.00	\$0.00	\$0.00
\$0.974 per M1 Standard Large (m1.large) Windows SQL Server Std instance-hour (or partial hour)	413.00	\$402.26	\$33.79	\$436.05
\$0.00 per GB-month of provisioned storage under monthly free tier	4.23	\$0.00	\$0.00	\$0.00
\$0.00 per GB-month of provisioned storage under monthly free tier	0.34	\$0.00	\$0.00	\$0.00
\$0.00 per GB-month of provisioned storage under monthly free tier	0.51	\$0.00	\$0.00	\$0.00
\$0.05 per GB-month of provisioned storage - US West (Oregon)	272.65	\$13.63	\$0.00	\$13.63

Embedded Content


Use the Embedded Content  component to display HTML content such as a web site or YouTube video.



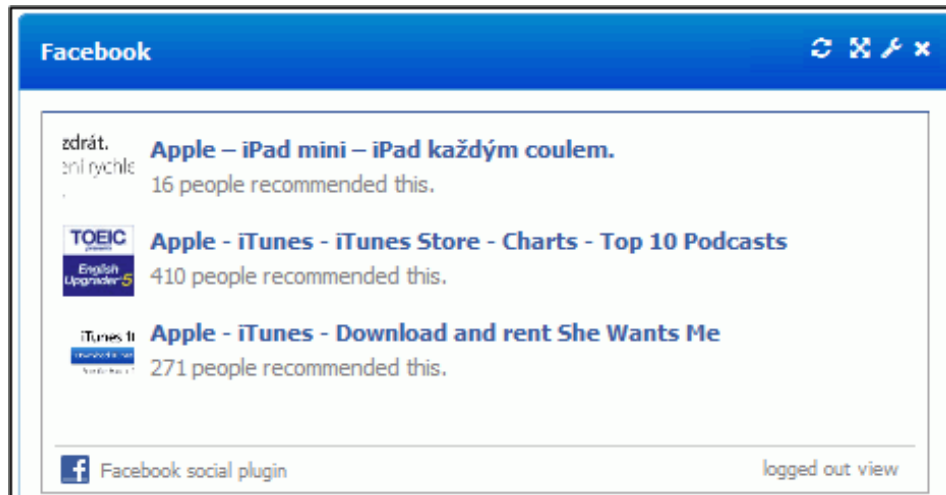
To configure this component, paste the URL for the content into the Source URL field.

Configure	
Window Title:	Embedded Content
Show Header:	<input checked="" type="checkbox"/> Yes
Show Border:	<input checked="" type="checkbox"/> Yes
Source URL:	//www.youtube.com/embed/zHkK9rwYZM4

Facebook

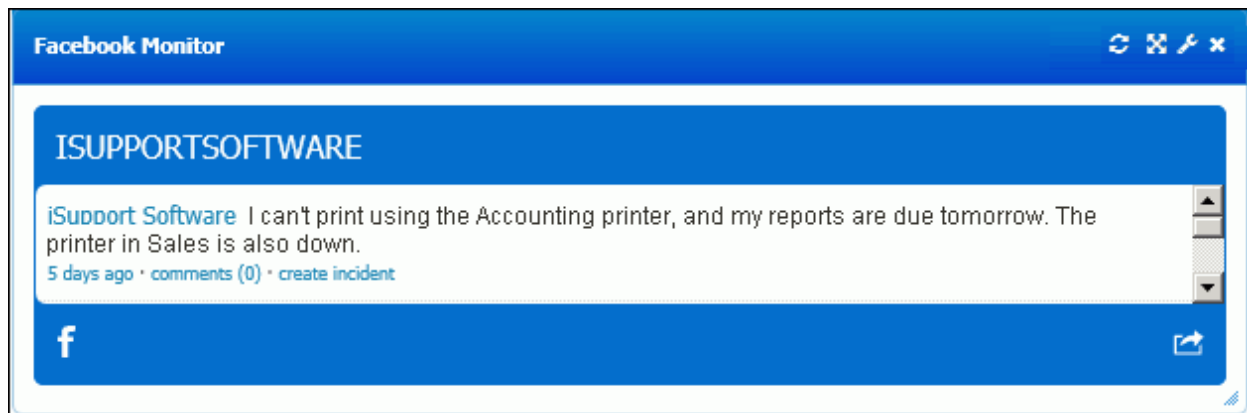
The Facebook  component displays a Facebook activity feed for a specified web site. To configure this component, enable Facebook Integration via the Facebook tab in the Social Media Integration Configuration screen

and then use the component configuration dialog to enter the web site (example: www.apple.com) in the Facebook Domain field.





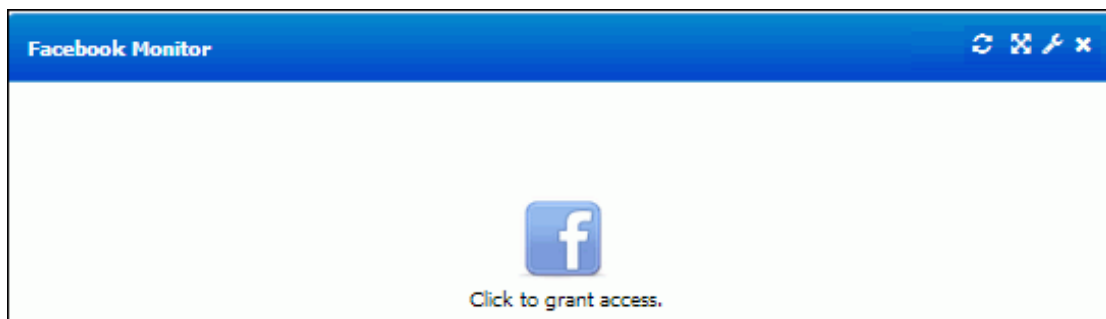
Facebook Monitor

The Facebook Monitor  component monitors a Facebook page and displays posts and comments from it. You can create an incident from a listed post or reply.





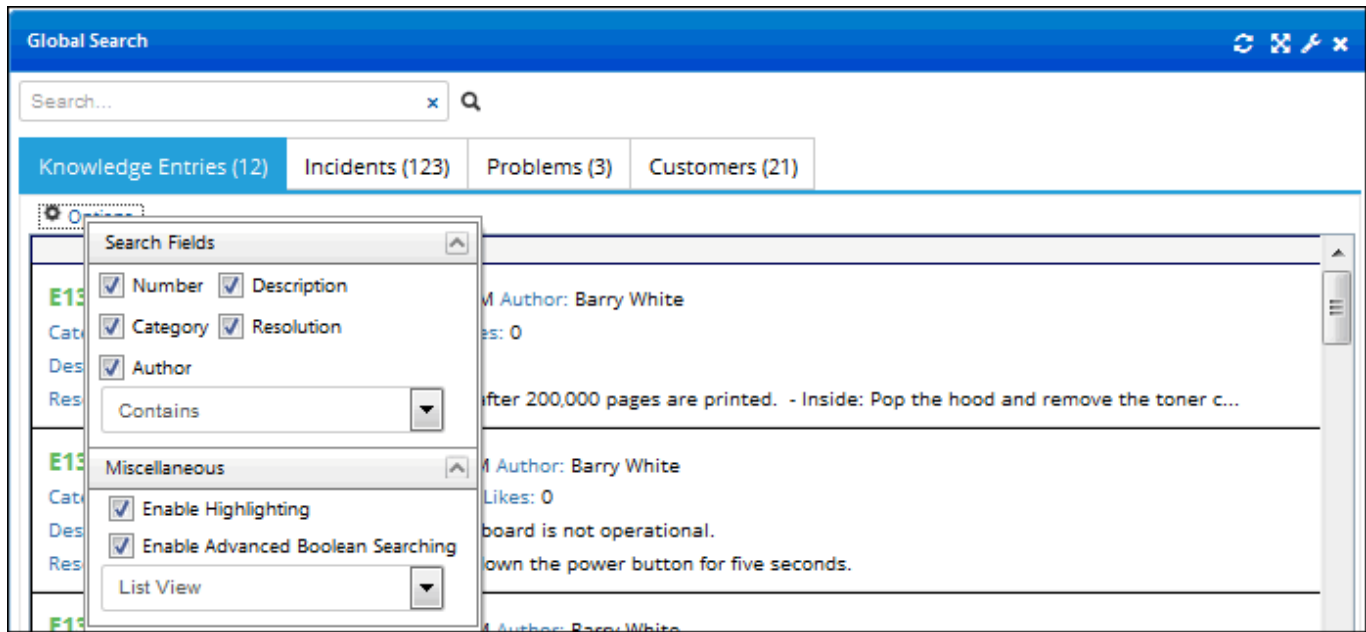
If the customer's Facebook email address exists for a customer in Customer Profiles, the matching Customer Profile record will be used; otherwise, a new Customer Profile record will be created with the customer's email address in the format of <Facebook username>@facebook.com. A reply will be posted to Facebook with the incident number and a link to the incident; if the Facebook application doesn't have permission to do this, an email will be sent to the customer's Facebook email account.

This component requires that a Facebook application is configured and made available to the Desktop via Social Media Integration Configuration screen. Enter the page username (which is included in the Facebook page URL) in the Monitor Page field in the component configuration  dialog. The following will appear; click to log in via Facebook and grant access to your public profile and friend list. Access to your public profile is required. Click the  icon to revoke access.




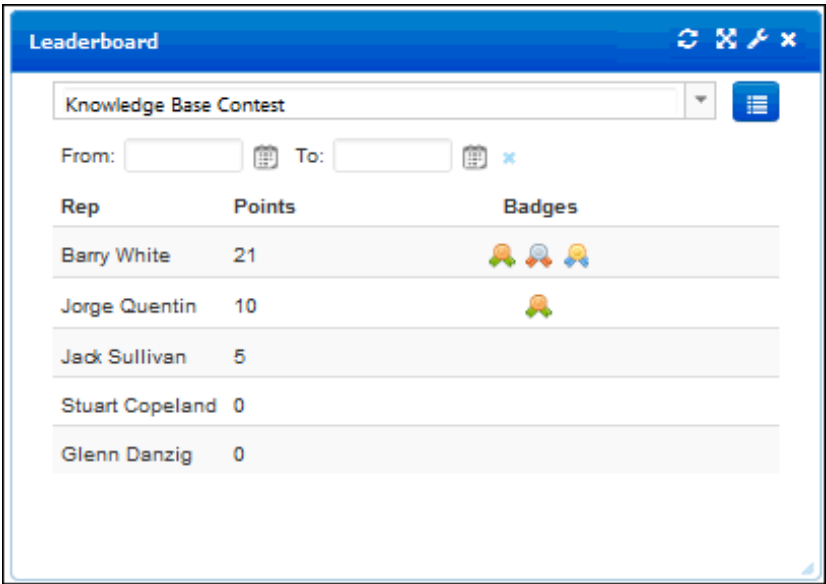
Global Search



The Global Search  component displays a dialog for searching iSupport data using keywords and, if searching knowledge, Boolean operators (And, Or, Not as well as parenthesis to group words and phrases). Select the record types/features to search via the Entity Types field in the component configuration  dialog; available record types/features are specified in the Dashboard Settings and Rep Groups screens in configuration. Use the Options link on each tab to select the fields to search, the type of search (Starts With, Contains, Ends With and Is), enable text highlighting, and select the type of view in which search results are displayed (list or classic).



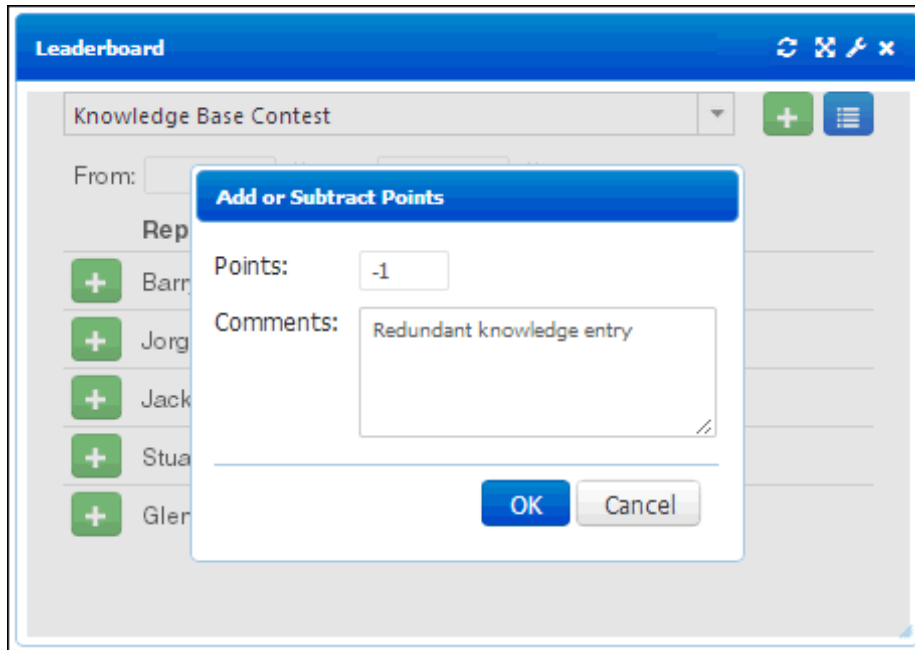
Leaderboard

Use the Leaderboard  component to create contests with configurable award levels, action-based point values, and badges (icons) to display when an award level is reached. Points can be awarded manually or assigned automatically based on completion of an iSupport action. Note that the dates in the From and To fields are for display filtering only; these fields do not affect point accumulation.

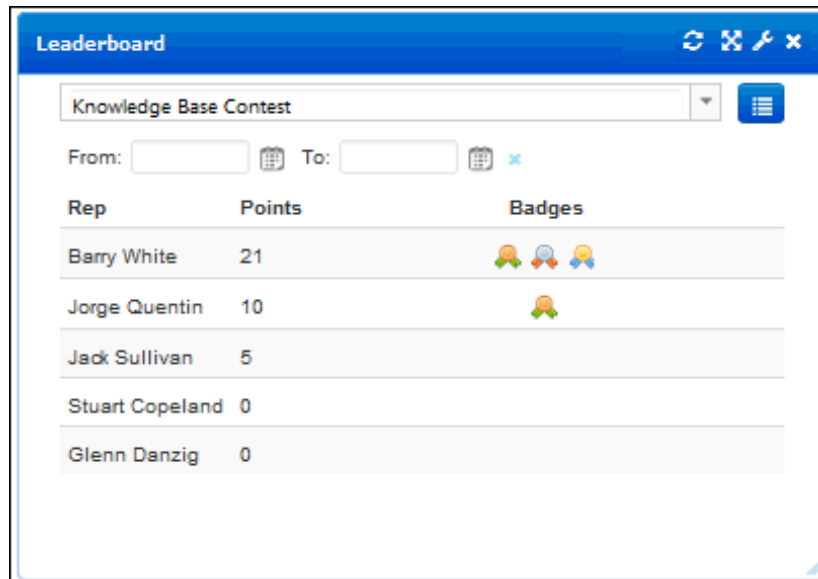



The Create New Leaderboard  icon will display next to the leaderboard dropdown for support representatives with Rep Manager Administrator access. The Add or Subtract Points  icon will display next to participant names for any

support representative designated as a Leaderboard Manager in the Leaderboard component configuration; this enables the support representative to manually add or remove points.



A leaderboard will appear to a support representative without Rep Manager Administrator access or Leaderboard Manager designation as follows:



The Leaderboard Details  icon displays the leaderboard description and a history of how points were added and removed.

Leaderboard Details


Description

Help us improve our knowledge base! If you achieve 20 points, you will receive a Top Performer award and \$100! If you achieve 15 points, you will receive \$50. If you achieve 10 points, you will receive \$25. Contest ends at the end of the month.

Rep Actions

Date	Rep	Points	Action	Added By	Comments
7/2/2013 11:29:10 AM	Jorge Quentin	Manual Add	10	Abby Kienle	He spent the weekend cleaning up the knowledge base
7/2/2013 11:27:07 AM	Barry White	Manual Add	-1	Connor Flynn	Redundant knowledge entry
7/2/2013 11:21:11 AM	Barry White	Knowledge Base Article Authored	1	System	
7/2/2013 11:20:07 AM	Barry White	Knowledge Base Article Authored	1	System	

Close

To configure a leaderboard, first enable the Leaderboard component in the Dashboard Settings screen. After clicking the Create New Leaderboard  icon to create a leaderboard, enter descriptive details in the upper portion of the dialog. Then include support representatives for the leaderboard via the Participants section in the Options field.

Configure

Window Title:

Leaderboard

Show Header:

Yes

Display Name:

Knowledge Base Contest

Description:

Help us improve our knowledge base! If you achieve 20 points, you will receive a Top Performer award and \$100! If you achieve 15 points, you will receive \$50. If you achieve 10 points, you will receive \$25. Contest ends at the end of the month.

Active:

Yes

Options:

Participants

Add Rep Group

Tier Two

Add Rep

Use the Leaderboard Managers section to enable support representatives to manually award points up to a specified maximum.

Options:

Participants

Leaderboard Managers

Kelsey Stout

15

max points



+

Stuart Copeland (10 points)






Glenn Danzig (10 points)

Connor Flynn (10 points)









Bob Franks (10 points)

Use the Award Levels section to enter the name, points, and badge icon for each award level. Click the Add Award Level  icon to display the Name, Points, and Badge fields; use the Save Award Level  icon to save your entries.

Options:



- Participants
- Leaderboard Managers 
- Award Levels
 -  
 - Name:
 - Points:
 - Badge:  Medal Award Bronze 

Options:


- Participants
- Leaderboard Managers 
- Award Levels
 - 
 -  Third Place (10 points) 
 -  Second Place (15 points) 
 -  Top Performer (20 points) 

Use the Award Actions section to select the iSupport actions and corresponding point amounts that will be awarded automatically when the action is accomplished.

Options:

- Participants
- Leaderboard Managers 
- Award Levels
- Award Actions
 - points
 
 - Select an Action--
 - Chat Request Accepted
 - Discussion Post Authored
 - Discussion Post Reply Authored
 - Incident Closed
 - Knowledge Base Article Authored
 - Knowledge Base Authored Article Approved
 - Time Based Rule Exceeded
 - Time Based Rule Met

Mass Mailing/Approvals

iSupport's Mass Mailing Approvals feature requires approvals on any correspondence sent from a customer view. The Mass Mailing  component includes correspondence that is awaiting approval or has been rejected by an approver.

To configure this feature:

- Enable required approvals and designate approvers via the Mass Mailings screen.

Require Approval on Mass Mailings On Off

Approvers

[Add](#) [Remove](#)

<input type="checkbox"/>	Last Name ▲	First Name	Email	Phone	Primary Group
<input type="checkbox"/>	Flynn	Connor	cf@example.com	360-397-1058	Support (IT)
<input type="checkbox"/>	Kienle	Abby	ak@example.com	360-397-1000	Administrators

- Use the Dashboard Settings screen to make the component available for the author and approver to add to a dashboard.
- When the author creates a correspondence from a customer view and clicks the Send button, the Mass Mailing Manager dashboard component displays the correspondence for the approver to open via the Open icon.

Mass Mailing Manager

Author	Created	Status	Recipients
Gena Pirie	1/4/2013 10:33:31 AM	Awaiting Review	View Henry Alder (Not Sent) Christina Apple (Not Sent)

Approvers can use the Reject button in the Correspondence screen to prevent the correspondence from being sent, or the Send button to send the correspondence.

Correspondence

File Options

From: BW@example.local

Cc:

Bcc:


Attach a file

Show Options


Subject: Contact Information Update Request

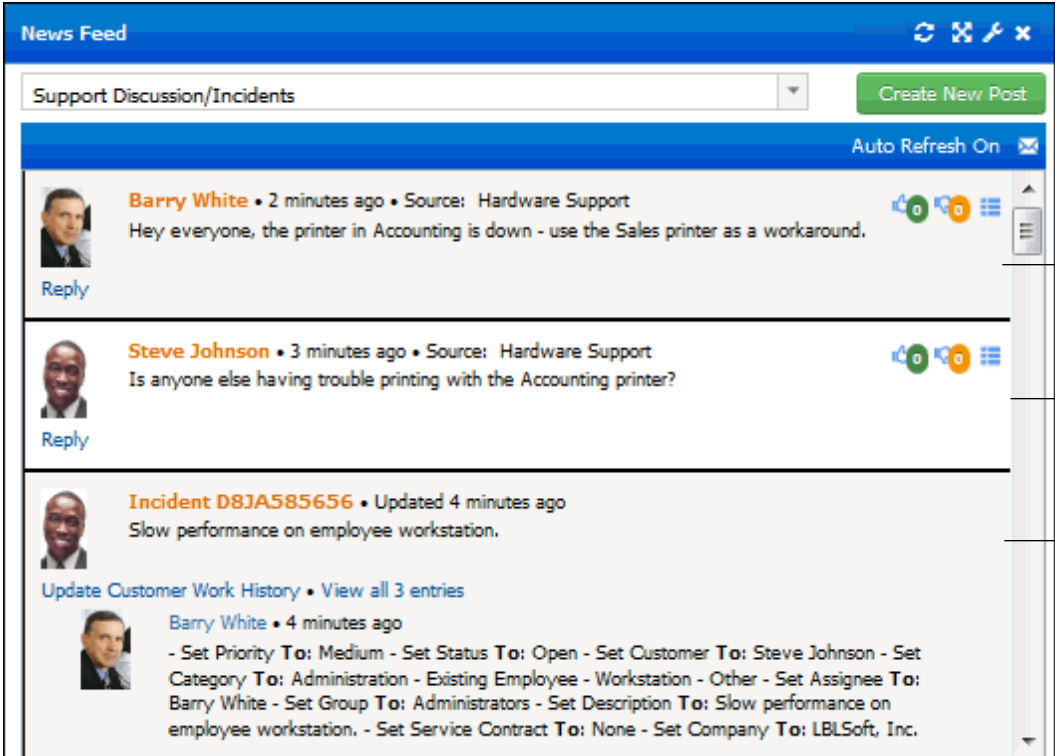
Hello,
 Please send me your updated contact information. Here is what we have in our system:
 <First Name><Last Name>

The correspondence will display to the author in the Mass Mailing Manager.

Mass Mailing Manager				
Author Created Status Recipients				
	Barry White	8/21/2014 8:36:52 AM	Rejected	View

News Feeds

The News Feed  component contains feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See ["Configuring News Feeds" on page 34](#) for information on setting feed options.



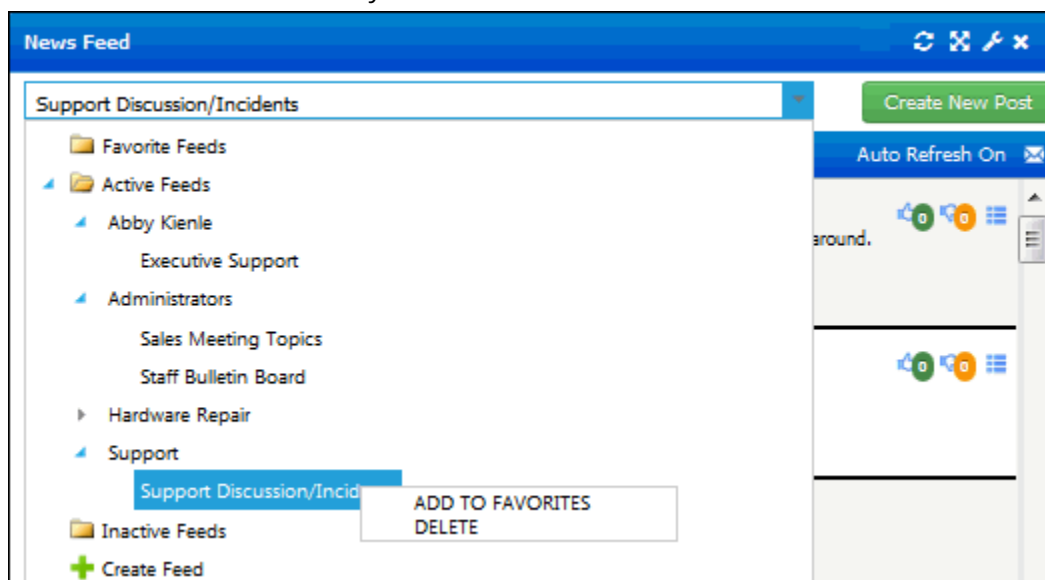
The screenshot shows the News Feed interface with a blue header bar. Below the header, there's a dropdown menu set to "Support Discussion/Incidents" and a green "Create New Post" button. A toggle switch for "Auto Refresh On" is visible. The feed contains three items:

- Discussion post by Barry White:** "Hey everyone, the printer in Accounting is down - use the Sales printer as a workaround." Includes a "Reply" link and interaction icons.
- Discussion post by Steve Johnson:** "Is anyone else having trouble printing with the Accounting printer?" Includes a "Reply" link and interaction icons.
- Work item entry:** "Incident D8JA585656 • Updated 4 minutes ago. Slow performance on employee workstation." It includes a link to "Update Customer Work History" and "View all 3 entries". Below this is a detailed log of actions taken by Barry White, such as "Set Priority To: Medium" and "Set Status To: Open".

Annotations on the right side of the screenshot point to the "Discussion posts" section (covering the first two items) and the "Work item entry" section (covering the third item).

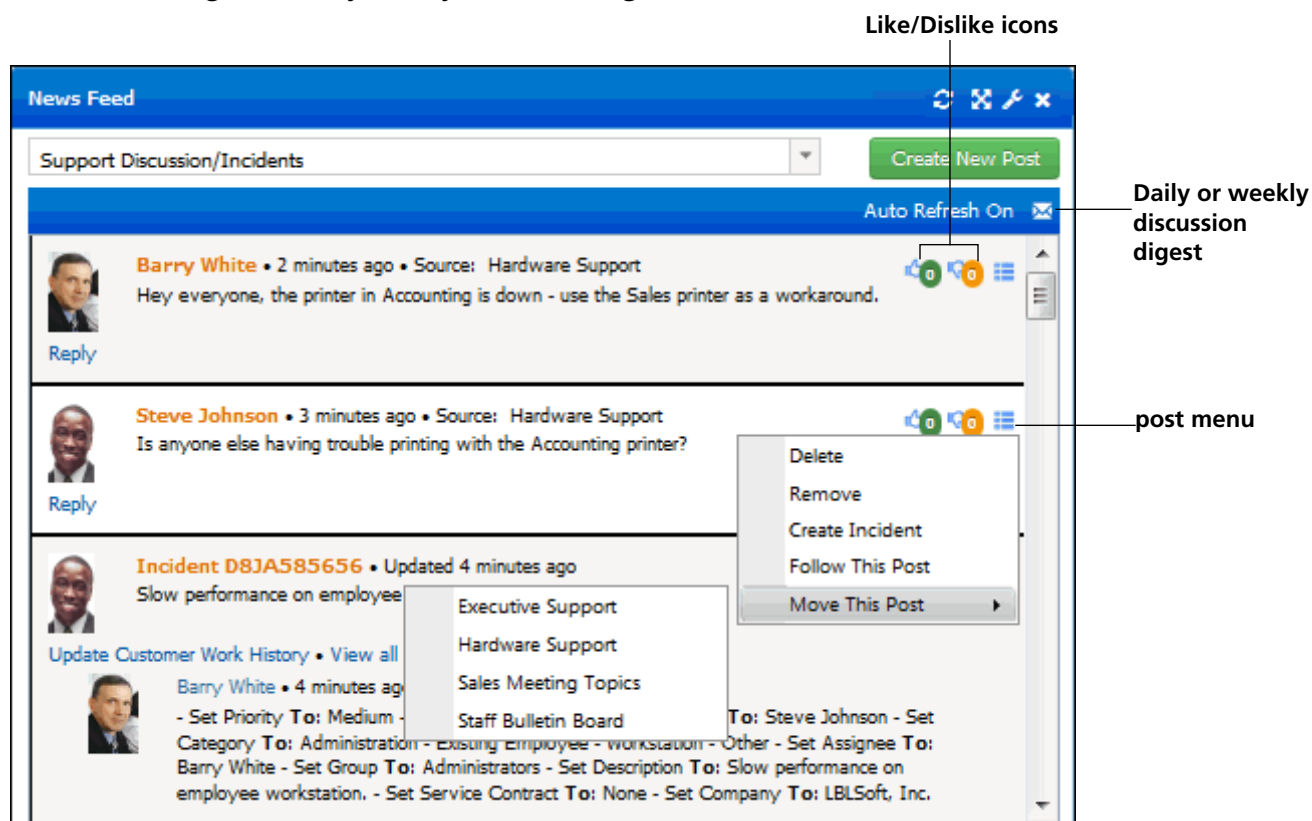
Use the Auto Refresh On link at the top of a feed to stop the news feed from automatically refreshing (but replies and your posts will still appear). The pause will be released when you manually refresh the component, create a post, or when the page is reloaded.

News feeds are listed in the dropdown by support representative group or by support representative. The Delete option will appear if you have Discussion Feed Administrator access or if you have created a private feed. Right-click on a news feed in the list to delete or add to your Favorite Feeds folder.





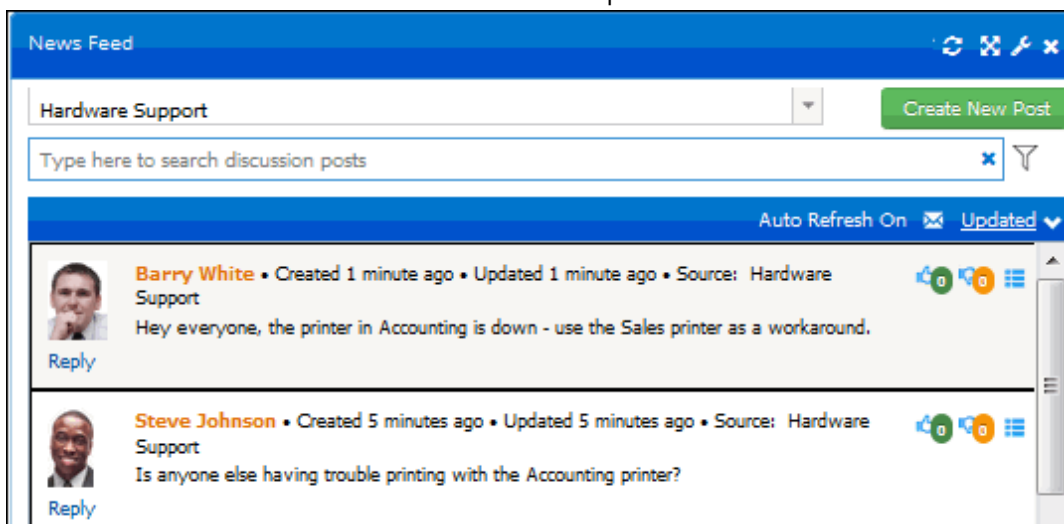
Work item entries contain updates for incidents, problems, changes, and purchases; support representatives with the Update via News Feed permission can use the Update Customer Work History link to add work history to the item.

Discussion posts are entered by support representatives in news feeds on the iSupport Desktop and by customers in news feeds on the mySupport portal. Post entries contain Like/Dislike icons and a post menu; discussion-only feeds include searching and a daily/weekly discussion digest feature.



News feeds that contain only discussion posts will include a search field for performing a literal (but not case sensitive) search for a character string within all posts in the feed; click the Filter icon to refine the search by

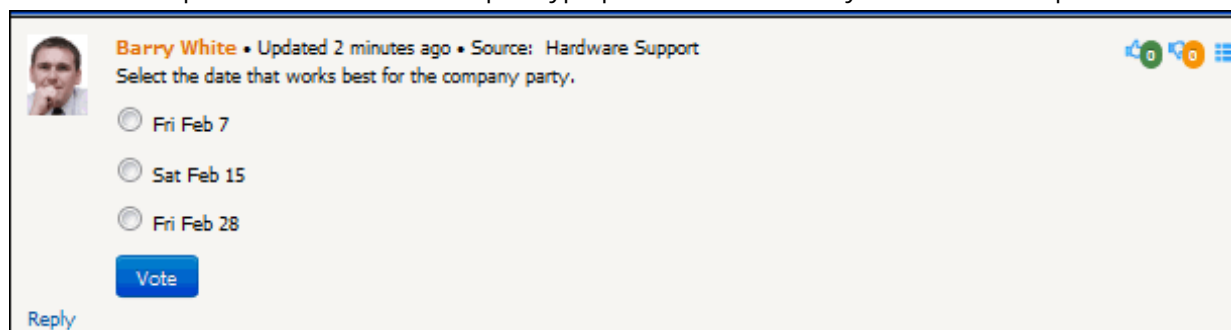
support representative or customer. Use the Add Condition  and Remove Condition  icons to add or remove search filters. You can click on a customer's avatar or name to open the customer's Profile record.



- Use the **Create New Post** button to create a discussion post to appear in the feed. You can include images in this field.

Poll - Select Yes to create a list of options in a poll-type post with radio button response options in discussion-only news feeds on the Desktop and mySupport portal.

Poll posts will display only to authenticated users, and only support representatives with Discussion Administrator permission can create a poll-type post. A user can only vote once on a poll.



Barry White • Updated 2 minutes ago • Source: Hardware Support

Select the date that works best for the company party.

☐ Fri Feb 7

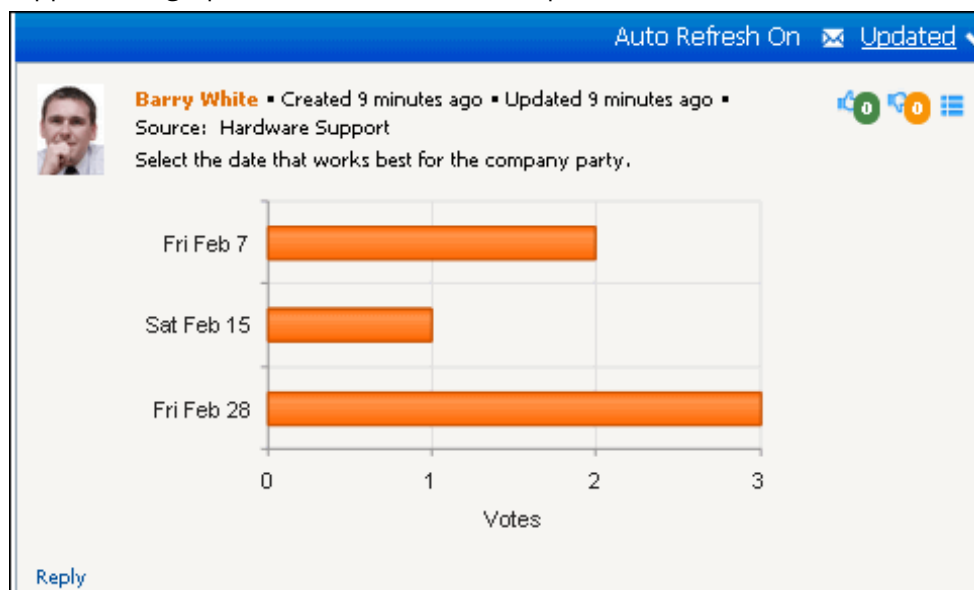
☐ Sat Feb 15

☐ Fri Feb 28

[Vote](#)

[Reply](#)



Results will appear in a graph after a user selects a response:





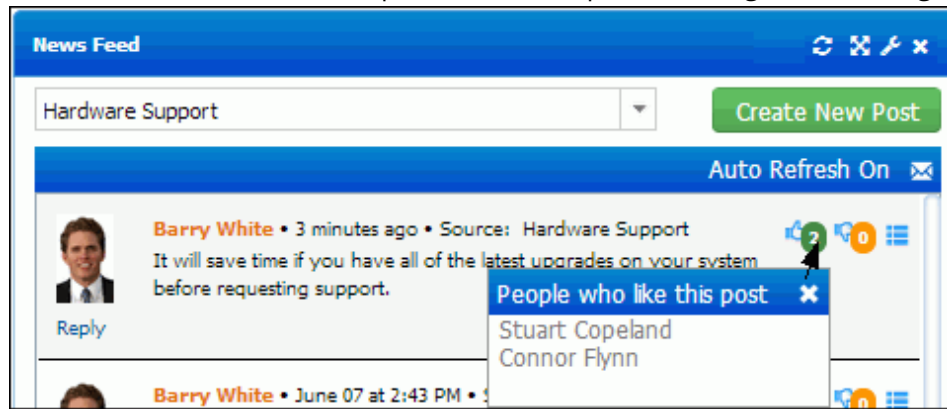
Follow this post - Select Yes to enable an email notification to be sent when someone replies to the post. Notification content is selected in the Rep Follow Notification and Customer Follow Notification fields in the Discussion Posts section of the News Feed Configuration dialog, and set up in configuration. The Follow option is also included in the Create Discussion Post dialog; a Default for Follow Option on Discussion Posts field is included in the Preferences screen (accessed via the Desktop menu) for setting a default for the Follow option in the Create Discussion Post dialog and in the Reply field on a discussion feed.


Allow replies - Select Yes to include the Reply link on the post.

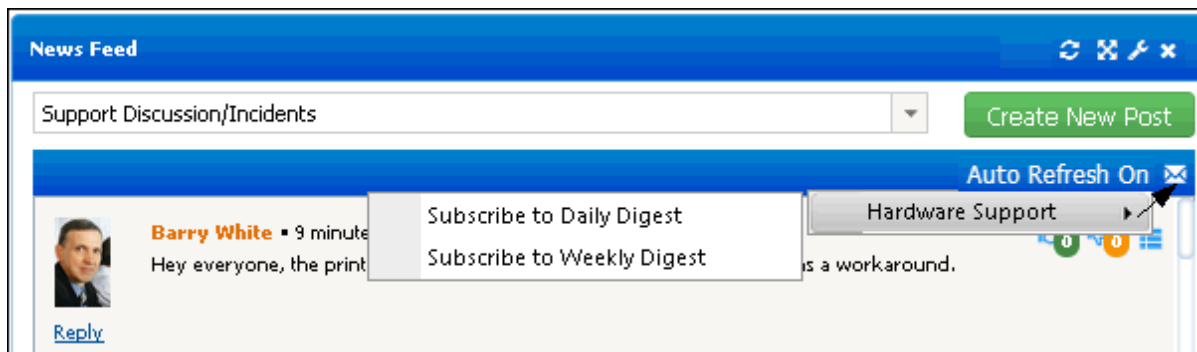
Pin/Expires in - Select Yes to retain the post at the top of the feed for you and others viewing the feed. A pin icon will appear on pinned posts. Use the Expires In field to enter the number of days in which the post should be pinned or leave it blank to pin the post indefinitely.


- Click the **Like**  or **Dislike**  icons to register a like or dislike; you can click on the icon again to withdraw it. You can display the names of support representatives and customers who have liked and disliked discussion


posts by hovering over the Like  or Dislike  icons; this popup will not appear if Anonymous Likes or Anonymous Dislikes is enabled for discussion posts in the component configuration dialog.






- Use the **discussion digest**  icon to subscribe to an email regarding discussion activity that can be sent daily or weekly. It is sent on the schedule of the Discussion Digest agent that is configured via the Global tab in the Agents screen. The email will list the number of new posts and replies for the day or week, as well as a link to the discussion feed. Use the Send Email After New Post option to enable an email to be sent every time a new post is added to the feed; use the Discussion Post Custom Notifications screen to customize this notification.



Use the following options on the discussion post menu  :

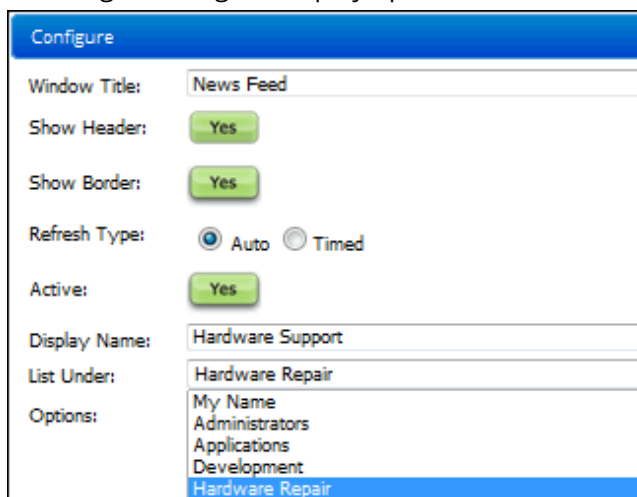
- The **Delete** and **Remove** options appear if you have Discussion Feed Administrator access and the Allow Post Deletion and Allow Post Removal options are configured. Deletion will delete the post entirely; removal will hide a post from other participants viewing the feed but the post will be available in discussion feed views. The text "This post has been removed due to content that violates our user guidelines" will appear in place of the entry; this text can be changed for the mySupport portal via the Resource Editor. If you do not have Discussion Feed Administrator access, you will not be able to delete your own post. Note that an administrator can also remove or delete a post via a screen in configuration. A customer can remove a post that he/she created if there is no reply; this will delete the post entirely.
- The **Create Incident** option appears for posts submitted by customers via the mySupport portal; select to open the Incident screen with the customer selected and the post in the Description field.
- The **Follow This Post** option enables an email notification to be sent when someone replies to the post. Notification content is selected in the Rep Follow Notification and Customer Follow Notification fields in the Discussion Posts section of the News Feed Configuration dialog and set up in configuration. The Follow option is also included in the Create Discussion Post dialog; a Default for Follow Option on Discussion Posts field is included in the Preferences screen (accessed via the Desktop menu) for setting a default for the Follow option in the Create Discussion Post dialog and in the Reply field on a discussion feed. An Author Following  icon will appear when a discussion post author follows a post that they have submitted.
- The **Move This Post** option appears if you have the Discussion Feed Administrator designation in your Support Representative Profile record and the Allow Move option is selected in the component configuration dialog. An email will be sent to the author of the post with the post creation date/time, previous feed and new discussion feed in which the post is now included, and the post content.
- The **Share This Post** option appears if the Allow Rep Share option is configured for the news feed. It enables support representatives to share a discussion post via email. The Correspondence screen will appear to the

support representative for using include fields for inserting information related to the discussion post. If the Allow Customer Share option is configured for the news feed, customers can share discussion posts on the mySupport portal via the Share This Post  icon; the customer's mail client will appear with the content of the post and a link to the post.

- The **Get Share Link** option appears if the Allow Rep Share option is configured for the news feed. It displays a Discussion Post Share Link dialog for copying a link to a post to the clipboard.
- **Merge This Post** to move a post under another post. After selecting this option a search dialog will appear with other posts in the feed. Click the date/time link to select the post to which the current post should be moved. Any replies to a post are also moved.
- **Disallow Replies to This Post** will prevent the Reply link from appearing on a post.
- The **Pin This Post** option retains the post at the top of the feed for you and others viewing the feed. After selecting this option, a Pin Expiration dialog will appear for you to specify no expiration or the number of days for the post to be retained. A pin  icon will appear on pinned posts.
- The **Edit This Post** option appears for 15 minutes after a post is entered, if a reply has not been posted. Customers edit discussion posts on the mySupport portal via an Edit  icon.
- A **Create Knowledge Entry** option will appear to discussion administrators to enable creation of a new knowledge entry from a discussion post. The post will be included in the knowledge entry Description field, and the most recent reply will be included in the Resolution field.

Configuring News Feeds

Select  Create Feed in the News Feed component dropdown to create a news feed. The Configure dialog appears; use the fields in the top half of the dialog to configure display options.



The image shows a 'Configure' dialog box with the following fields and options:

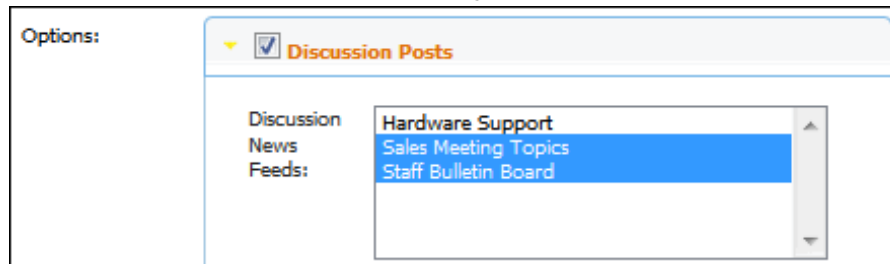
Window Title:	News Feed
Show Header:	<input checked="" type="button" value="Yes"/>
Show Border:	<input checked="" type="button" value="Yes"/>
Refresh Type:	<input checked="" type="radio"/> Auto <input type="radio"/> Timed
Active:	<input checked="" type="button" value="Yes"/>
Display Name:	Hardware Support
List Under:	Hardware Repair
Options:	<div>My Name Administrators Applications Development Hardware Repair</div>

Use the Active button to remove the feed from the Active Feeds folder in the news feed dropdown and include it in the Inactive Feeds folder. This will make the feed read-only - support representatives will still be able to view the feed and any discussion posts in the feed will be included in global searches. The feed will be removed from the mySupport portal.

The List Under field determines how to list the news feed in the Active Feeds folder in the news feed dropdown; select My Name to list the news feed under your own name or select a group to list a shared news feed under the name of one of your groups.

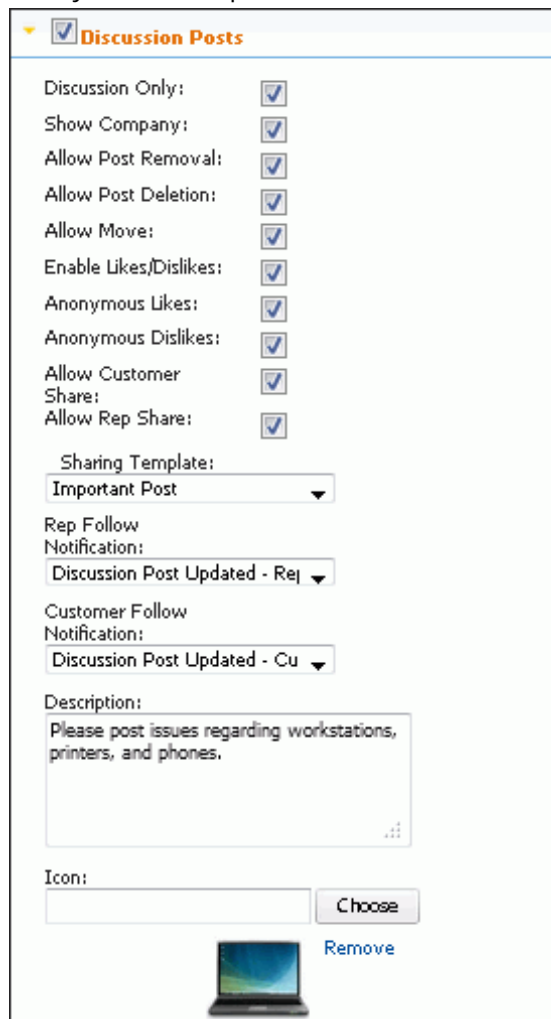
Configuring Discussion Posts

Enable the Discussion Posts section in the Configure dialog to include discussion posts in a news feed. If you **do not have** Discussion Feed Administrator access in your Support Representative Profile record, use the Discussion News Feeds field to include entries in other shared discussion-only news feeds.



The screenshot shows a configuration window titled 'Options:'. Inside, there's a section for 'Discussion Posts' which is expanded. Below this, there are labels for 'Discussion', 'News', and 'Feeds:'. To the right of 'Feeds:', there is a list box containing three items: 'Hardware Support', 'Sales Meeting Topics', and 'Staff Bulletin Board'. The 'Sales Meeting Topics' item is currently selected and highlighted in blue.

If you **have** Discussion Feed Administrator access in your Support Representative Profile record, the **Discussion Only** checkbox will appear to include only discussion posts in the feed.







This screenshot shows a detailed configuration window for 'Discussion Posts'. At the top, the 'Discussion Posts' section is expanded. Below it, there are several checkboxes, all of which are checked: 'Discussion Only:', 'Show Company:', 'Allow Post Removal:', 'Allow Post Deletion:', 'Allow Move:', 'Enable Likes/Dislikes:', 'Anonymous Likes:', 'Anonymous Dislikes:', 'Allow Customer Share:', and 'Allow Rep Share:'. Below these checkboxes are three dropdown menus: 'Sharing Template:' (set to 'Important Post'), 'Rep Follow Notification:' (set to 'Discussion Post Updated - Rep'), and 'Customer Follow Notification:' (set to 'Discussion Post Updated - Cu'). There is also a 'Description:' field with the text 'Please post issues regarding workstations, printers, and phones.' and an 'Icon:' field with a 'Choose' button. At the bottom, there is a small image of a laptop and a 'Remove' button.

The following options appear for discussion-only feeds:



- **Show Company** - Select this checkbox to include the following in the avatar hover text for a discussion post:
 - "works at <company>" after the customer's name on a customer post on both the Desktop and the mySupport portal
 - "forum representative" after the support representative's name on a support representative post on the mySupport portal

The hover text can be changed for the mySupport portal via the Resource Editor.


- **Allow Post Removal** - Select this checkbox to enable any support representative with Discussion Feed Administrator access to remove a discussion post in the feed. This will hide the post from other participants viewing the feed, but the post will still be available in discussion feed views. The text "This post has been removed due to content that violates our user guidelines" will appear in place of the entry; this text can be changed for the mySupport portal via the Resource Editor.
- **Allow Post Deletion** - Select this checkbox to enable any support representative with Discussion Feed Administrator access to delete a discussion post in the feed. This will delete the post entirely.
- **Allow Move** - Select this checkbox to enable any support representative with Discussion Feed Administrator access to move a discussion post and all of its replies to another discussion. The following email will be sent to the author of the post:
Subject: Discussion Post Moved
Body:
This discussion post has been moved:
- Created: <creation date and time>
- Old Discussion Feed: <previous discussion feed>
- New Discussion Feed: <discussion feed in which post is now included>
- Message: <post content>
This email will not be sent if the person moving the post is not the author of the post.
- **Rep Follow Notification** - Select the email notification to be sent if a support representative selects the Follow This Post option and someone replies to the post. These notifications are set up in the Configuration module.
- **Customer Follow Notification** - Select the email notification to be sent if a customer selects the Follow This Post option and someone replies to the post. These notifications are set up in the Configuration module.
- **Description/Icon** - Use these fields to enter a description and icon for display on the mySupport portal; it will appear if you add a Discussion News Feed List link to a mySupport portal navigator. For the icon, your uploaded image will be constrained to 64x64 pixels with the proportions locked. You can also display a link for displaying entries from all discussion-only news feeds and a link for displaying entries from one discussion-only feed.

 Executive Support (0)	 Hardware Support (4)
	<p>• Please add more detail to this entry.</p> <p>• It will save time if you have all the latest updates on your system before requesting support.</p> <p>• I can't print using the Sales printer either.</p>
 Sales Meeting Topics (1)	 Staff Bulletin Board (4)
<p>• Hey everyone, please submit your goals for the coming year by tomorrow's meeting.</p>	<p>• System maintenance is performed every Saturday 9:00 - 11:00 a.m. The network will not be accessible at that time.</p> <p>• Please place your order for office supplies by this afternoon at 4:00 p.m.</p> <p>• Staff meetings are now on Tuesdays at 9:00 a.m. in the conference room. Our fabulous technical writer will bring snacks.</p>

The following options are available for feeds that are **not** discussion-only (containing both discussion posts and/or entries for work item updates).

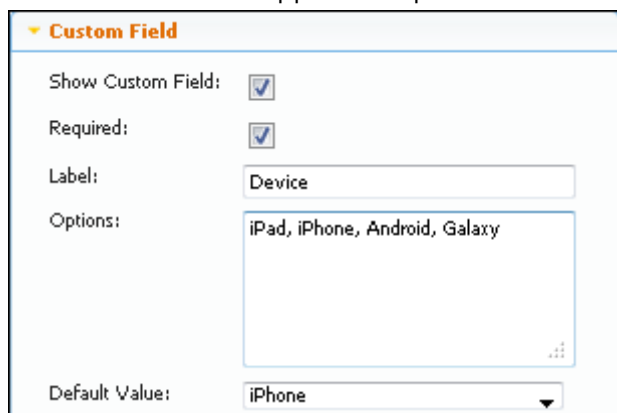
- Use the **Enable Likes/Dislikes** field to include Like  and Dislike  icons on each discussion post. You can display the names of support representatives and customers who have liked and disliked discussion posts by

hovering over these icons; select the **Anonymous Likes** or **Anonymous Dislikes** options to prevent display of these names.

- **Allow Customer Share** - Select this checkbox to enable customers to share a post via the mySupport portal. When a customer clicks the Share This Post  icon, the customer's mail client will appear with the content of the post and a link to the post.
- **Allow Rep Share** - Select this checkbox to enable the Share This Post option for support representatives to share a discussion post via email. Use the Sharing Template field to select a predefined correspondence template that will be applied in the Correspondence screen; include fields can be used to insert information related to the discussion post.
- Use the **Discussion News Feeds** field to include entries from other shared discussion-only news feeds.

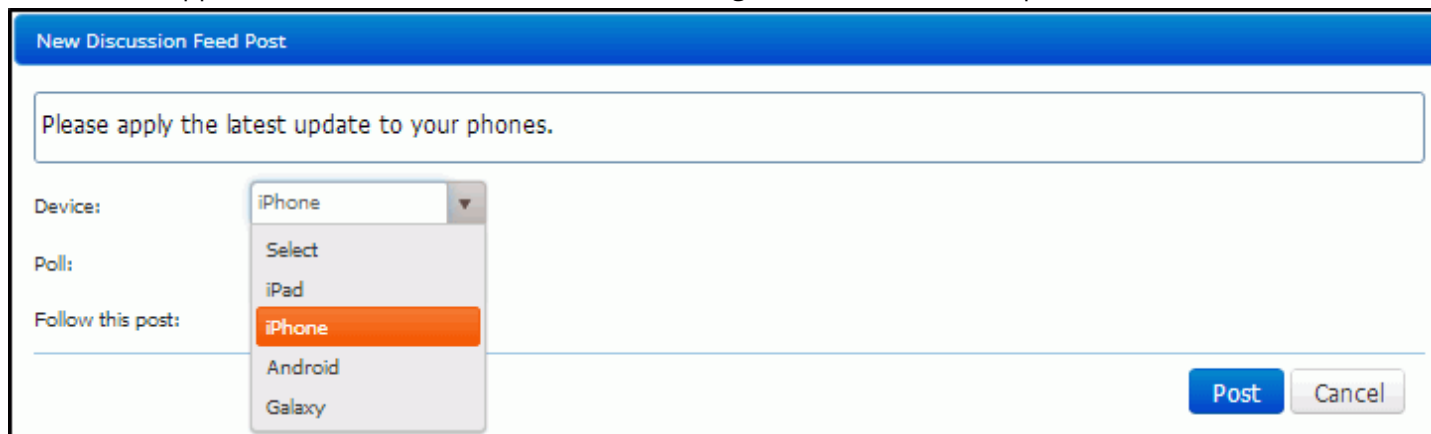
Configuring Custom Fields

Use the Custom Field section to add a custom field to posts in a discussion-only news feed. You can make it required, enter options for selection (separate with a comma), and set a default value. Posts can be sorted by the custom field configured for a feed. Note that custom fields do not appear in replies.



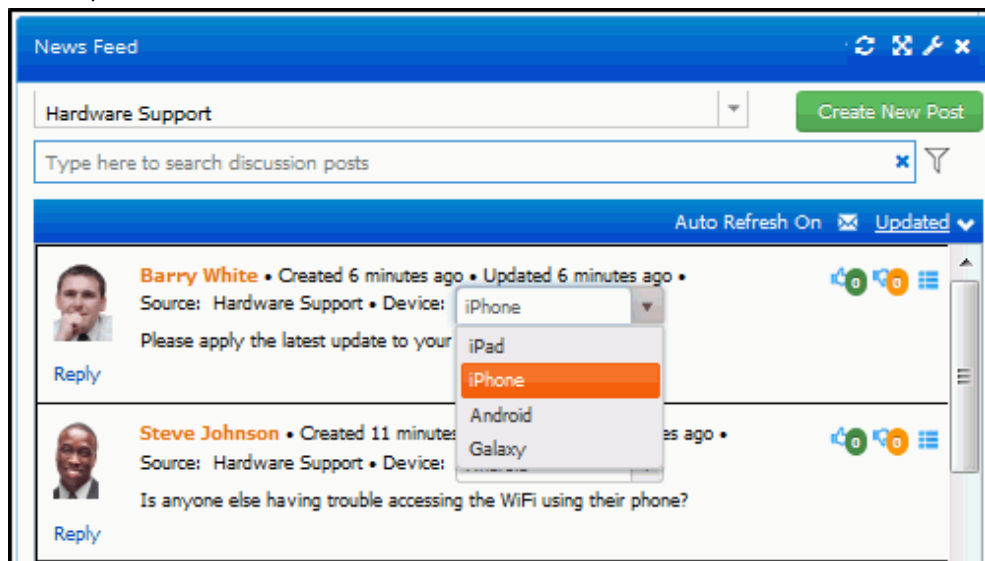
The screenshot shows a 'Custom Field' configuration window. It has a title bar with a dropdown arrow and the text 'Custom Field'. Inside, there are four sections: 'Show Custom Field:' with a checked checkbox; 'Required:' with a checked checkbox; 'Label:' with a text input field containing 'Device'; and 'Options:' with a text area containing 'iPad, iPhone, Android, Galaxy'. At the bottom, there is a 'Default Value:' section with a dropdown menu currently showing 'iPhone'.

The field will appear in the New Discussion Feed Post dialog as shown in the example below.

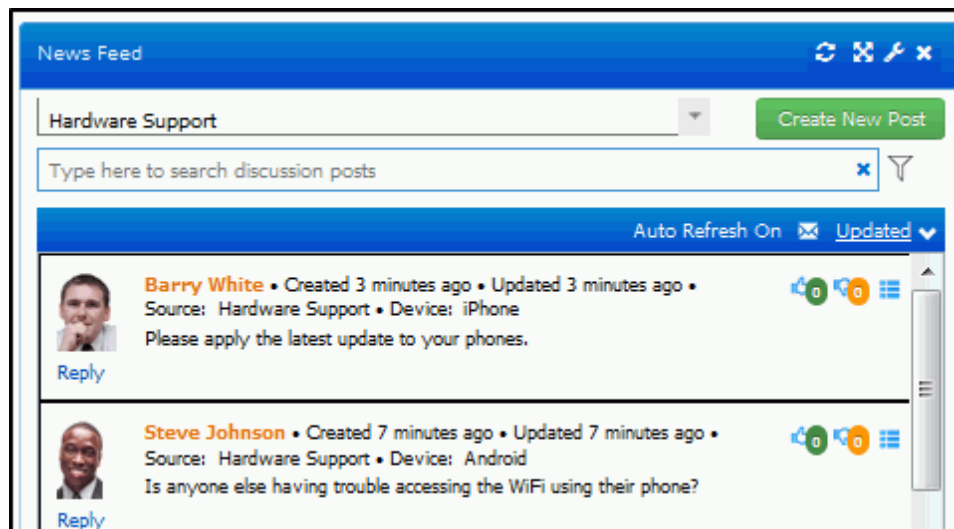


The screenshot shows a 'New Discussion Feed Post' dialog. At the top is a blue header bar with the title 'New Discussion Feed Post'. Below it is a large text area containing the text 'Please apply the latest update to your phones.'. Underneath the text area are three labels: 'Device:', 'Poll:', and 'Follow this post:'. The 'Device:' label is followed by a dropdown menu that is open, showing a list of options: 'Select', 'iPad', 'iPhone' (which is highlighted with an orange background), 'Android', and 'Galaxy'. At the bottom right of the dialog are two buttons: 'Post' and 'Cancel'.

The custom field will appear as follows to support representatives with Discussion Feed Administrator access; another value in the dropdown list can be selected or a different value can be entered.



The custom field will appear as shown below to support representatives without Discussion Feed Administrator access.



Configuring News Feed Access

The Access section appears if you have Discussion Feed Administrator access in your Support Representative Profile record. Use the Shared checkbox to enable representatives and customers to view feed entries. (If this box is unchecked, only you will be able to view the feed entries.) You can restrict availability to selected support representative groups and individual support representatives (in addition to yourself). When you add a support representative group or support representative, feed entries will only be available to those support representatives;

in the example below, feed entries would only appear to Stuart Copeland and members of the Hardware Repair group.

▼ Access

Shared: ☒

Restrict:

Add Rep Group

Hardware Repair

Add Rep

Stuart Copeland

Add Customer Group

Customer Groups

Administrators

Add Customer

Post Reply

☒ ☒

Customer

Steve Johnson

Post Reply

☒ ☐

If it is a discussion only news feed, you can also restrict access for customer groups and individual customers. Use the Add Customer Group and Add Customer fields to select the customer groups and customers that can view feed entries. Use the Post checkbox to enable the Create Discussion Post link for a customer or customer group, and the Reply checkbox to enable the Reply link for a customer or customer group. Clear both checkboxes to restrict a customer or customer group to view-only access for a feed.

Options:

☒ Discussion Posts

▼ Access

Shared: ☒

Restrict:

Add Rep Group

Add Rep

Add Customer Group

Customer Groups

Executive Mgmt Team

Add Customer

Post Reply

☒ ☒

Customer

Stuart Copeland

Post Reply

☒ ☐

Configuring Work Item Entries

Use the work item-specific sections in the Configure dialog to restrict display of work items; you can display only work items for a specified incident field value, view, and history type.

Incident

Filters

Company ▼ Select Value

Company: LBLSoft, Inc. ×

View

☒ All

☐ My Assigned

☐ My Authored

☐ My Groups

☐ My Locations

History Types

☒ Approval History

☒ Audit History

☒ Correspondence History

☒ Customer Audit History

☒ Customer Work History

☒ Rep Work History

☒ Rep Chat History

☒ Rule Group History

☒ SLA History

Use the History Type checkboxes to restrict entries to appear only if an action creates a work history entry of that type. For example, if only the Correspondence History checkbox is selected in the History Types section, an entry will appear only if a correspondence is received or sent from a work item.

History Types

<input type="checkbox"/> Approval History	<input type="checkbox"/> Customer Work History
<input type="checkbox"/> Audit History	<input type="checkbox"/> Rep Work History
<input checked="" type="checkbox"/> Correspondence History	<input type="checkbox"/> Rep Chat History
<input type="checkbox"/> Customer Audit History	<input type="checkbox"/> Rule Group History
	<input type="checkbox"/> SLA History

Incident D32G281372 • Updated 27 minutes ago

Unable to print from specified application.

[Update](#)



Stuart Copeland • 27 minutes ago

Correspondence Sent - More Information Required

Please send me more details regarding the issue you submitted on 3/2/2013 3:17:02 PM: Incident Number D32G281372 Unable to print from specified application.

Thank you,
Kelsey Stout
Incident Ref ID: D32G281372

Pin Board

Use the Pin Board  component to make selected incidents, problems, and changes visible on a Desktop pin board for tracking. After you have added the Pin Board component added to a dashboard, click the Pin Board  icon in the

toolbar of a saved work item. The following will appear; select the pin board(s) on which the work item should be included and enter a comment for the item.

Add To Pinboard

Select pin boards to pin this incident to:

CF - Pin Board

Comment:

Another connection issue to watch

Pin

Close

After selecting Pin, the work item will appear in the Pin Board component as follows:

Pin Board



Type: Incident

Number: D176332281

Priority: Low

Status: Open

Customer: Steve Johnson

Latest: 4 minutes ago by Barry White

- Set Priority **To:** Low


- Set Status **To:** Open

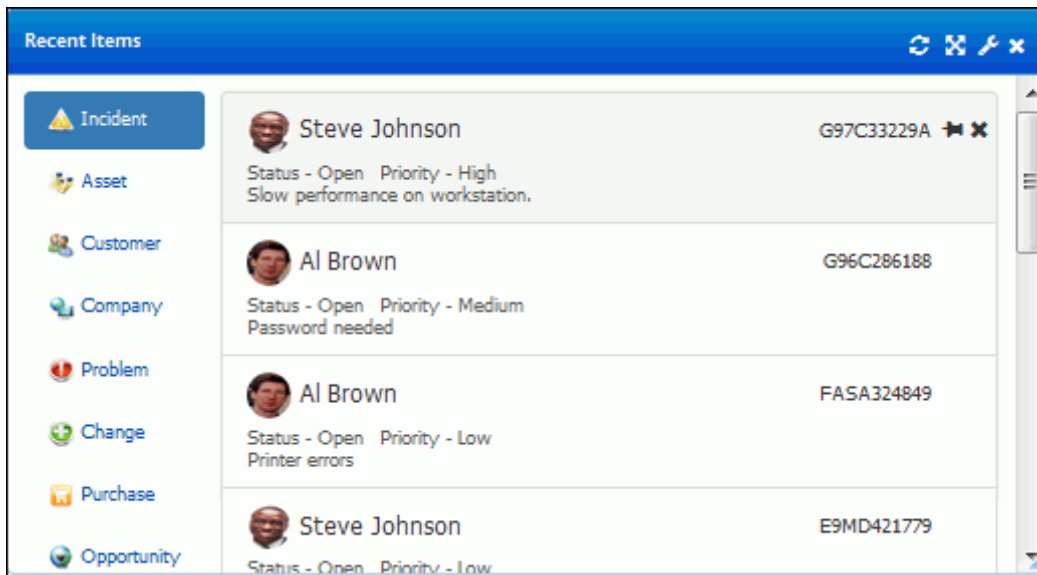
- Set Customer **To:** Steve Johnson

Incident ✕
D176332281
Low
Open
Steve Johnson

Incident ✕
D176353814
Low
Open
Bob Jones

Recent Items

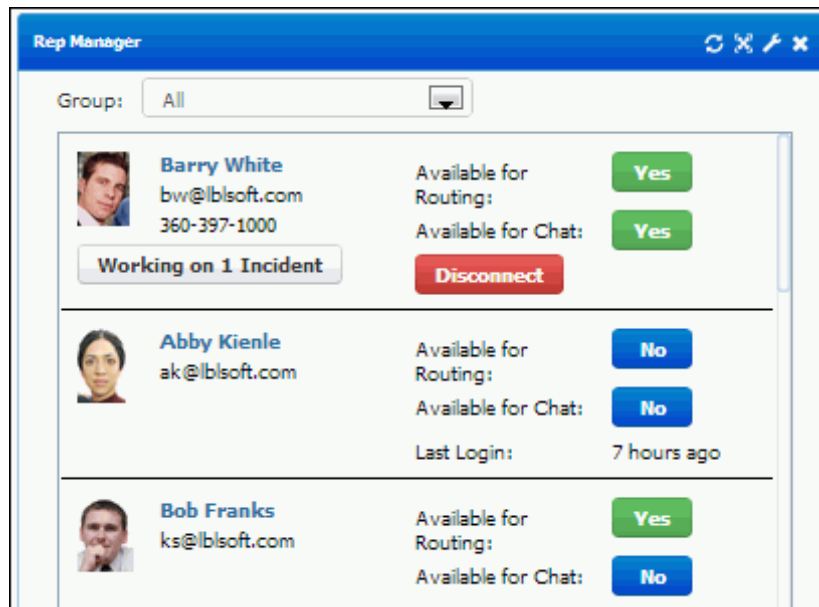
The Recent Items  component displays the ten most recently accessed work items. Record types appear as tabs that can be reordered, removed, and re-added; use the icons in the upper right corner to pin to the top or remove an item. Multiple Recent Item components can be added to a dashboard.



Rep Manager


Use the Rep Manager  component to:

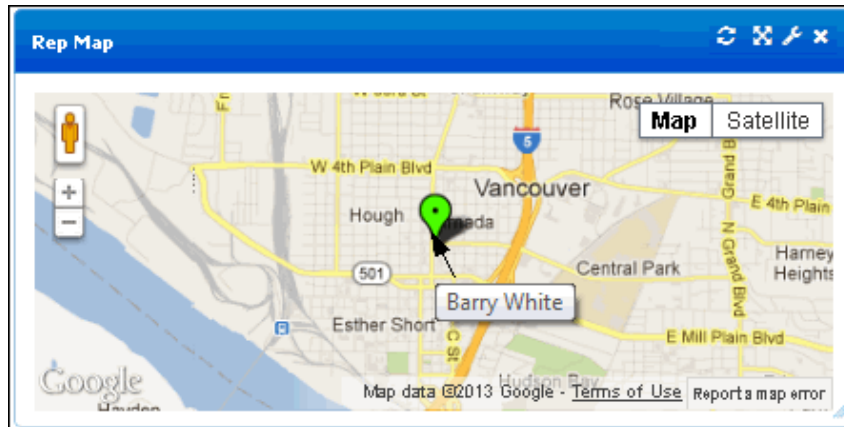
- Control support representative routing and mySupport portal chat availability. The Available for Chat button will display "Yes" if the support representative is logged in and scheduled for mySupport chat.
- End a support representative's session to make a license available (if your company has a limited iSupport license). When a support representative isn't logged in, the date and time the support representative last logged in will appear in place of the Disconnect button.
- Open the records a support representative is currently working on via the "Working on <xx> <work item type>" button. You can initiate a chat if the Awareness Chat feature is enabled.




This component is available to support representatives with the Rep Manager Administrator option enabled in their Support Representative Profile record. The Rep Manager Groups tab in the Rep Profile screen will enable selection of the groups whose members will appear in the component for the support representative.

Rep Map

The Rep Map  component displays the last known GPS location of any user logged into the mobile application. If using this feature on a mobile device, location services must be enabled on the device and on the browser.



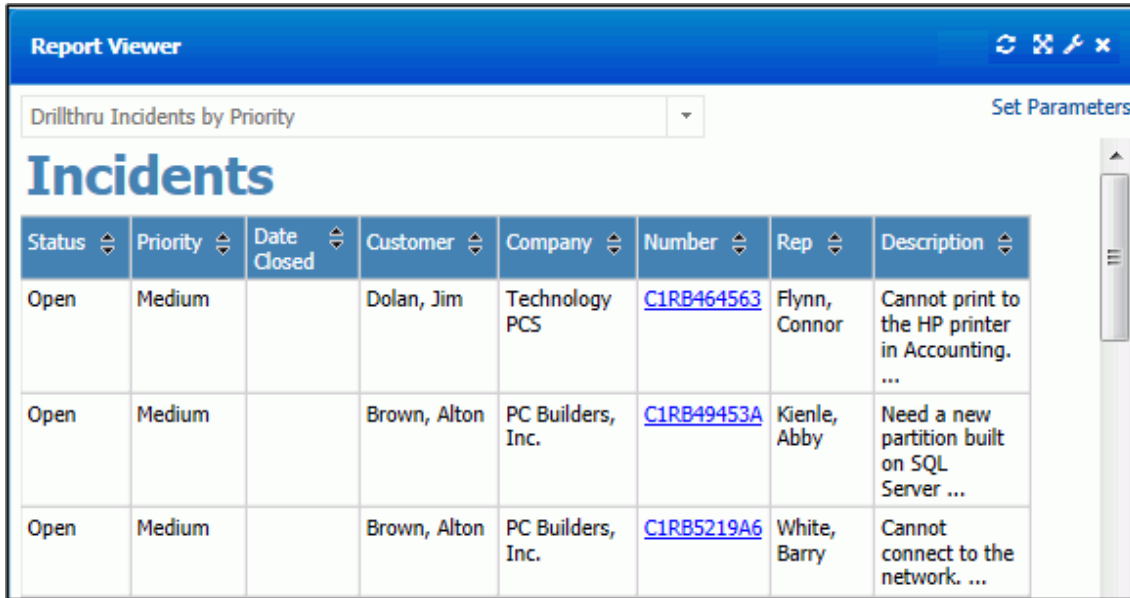
RSS Feed

Use the RSS Feed  component to display an RSS feed for a web site. To configure this component, you'll enter the URL for the RSS feed (example: <http://www.brafton.com/industry-news/headlines.rss>) and the number of items to include in the feed.



SSRS Report Viewer


Use the SSRS (SQL Server Reporting Services) Report Viewer  component to access SQL reports if iSupport's SQL Reporting functionality is installed via the iSupport SQL Reporting Setup Wizard.



The screenshot shows the SSRS Report Viewer interface. At the top, there's a blue header bar with the title "Report Viewer" and standard window controls. Below the header, a dropdown menu shows "Drillthru Incidents by Priority". To the right of the dropdown is a "Set Parameters" link. The main content area displays a report titled "Incidents" in a large blue font. Below the title is a table with 8 columns: Status, Priority, Date Closed, Customer, Company, Number, Rep, and Description. The table contains three rows of incident data. Each cell in the table has a small up/down arrow icon in the top right corner, indicating that the columns are sortable. The "Number" column contains hyperlinks for each incident.


Status	Priority	Date Closed	Customer	Company	Number	Rep	Description
Open	Medium		Dolan, Jim	Technology PCS	C1RB464563	Flynn, Connor	Cannot print to the HP printer in Accounting. ...
Open	Medium		Brown, Alton	PC Builders, Inc.	C1RB49453A	Kienle, Abby	Need a new partition built on SQL Server ...
Open	Medium		Brown, Alton	PC Builders, Inc.	C1RB5219A6	White, Barry	Cannot connect to the network. ...

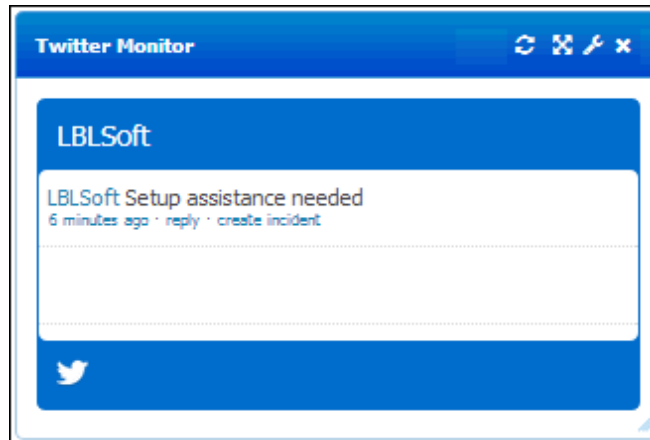
Twitter

The Twitter  component displays a Twitter feed for a specified Twitter username. This component requires that Twitter integration is set up via Social Media Integration Configuration screen.



Twitter Monitor

The Twitter Monitor  component searches Twitter and displays tweets that include a specified search term, or for a specified Twitter account, for the last 90 days. You can use the Reply link to reply to tweets directly from iSupport or use the Create Incident link to create an incident.




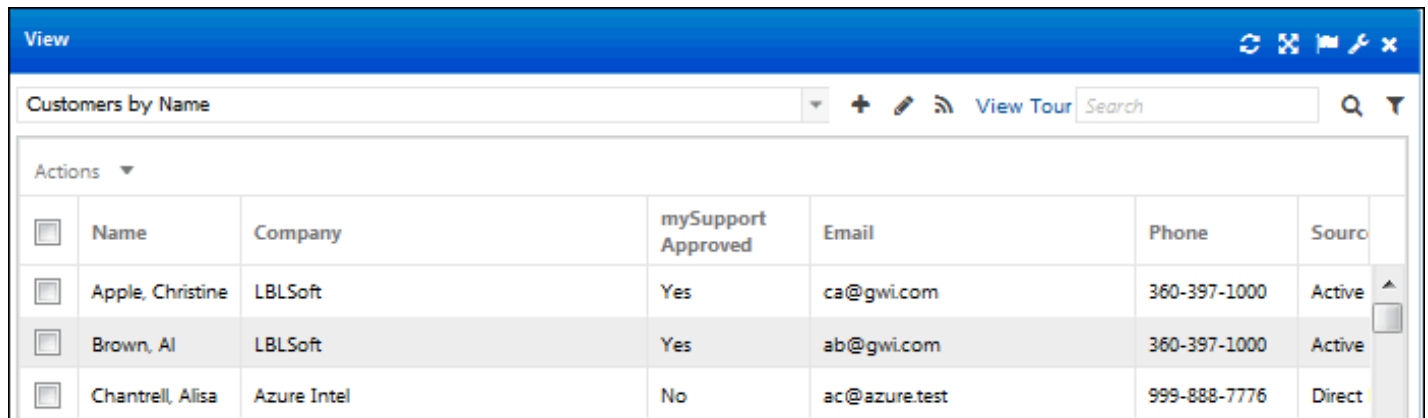
If creating an incident, a reply tweet will be sent with the incident number and a link to the incident. The originating tweet will be included in the Description field in the incident, and if the Twitter username exists for a customer in Customer Profiles, the matching Customer Profile record will be used. If the Twitter username does not exist for a customer, a new Customer Profile record will be created in the format of <Twitter username>@twitter.com.



This component requires that a Twitter application is configured and made available to the Desktop via the Social Media Integration Configuration screen.

Views




Use the View  component to display iSupport data in iSupport's default views and in views created via the View Designer and Report Designer. In the View component you can perform functions such as searching, opening and routing records, and more. You can also display headlines and FAQs.



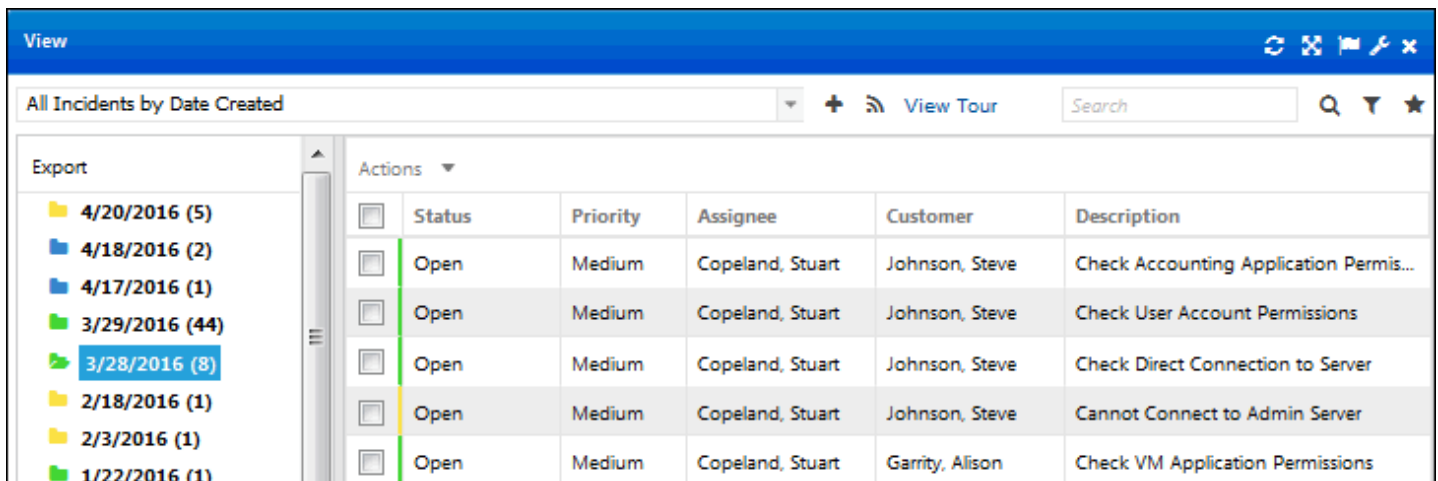
The screenshot shows a 'View' window titled 'Customers by Name'. It features a search bar, a 'View Tour' button, and a table with columns: Name, Company, mySupport Approved, Email, Phone, and Source. The table contains three rows of customer data.

	Name	Company	mySupport Approved	Email	Phone	Source
<input type="checkbox"/>	Apple, Christine	LBLSoft	Yes	ca@gwi.com	360-397-1000	Active
<input type="checkbox"/>	Brown, Al	LBLSoft	Yes	ab@gwi.com	360-397-1000	Active
<input type="checkbox"/>	Chantrell, Alisa	Azure Intel	No	ac@azure.test	999-888-7776	Direct

In a view with the read/unread feature is not enabled, all folders will be blue. If read/unread feature is enabled for a view, the following will display:

- A green  icon will display next to an unread item or a folder with both unread and updated items.
- A yellow  icon will display next to a folder with at least one updated item.
- A blue  icon will display next to a closed or read item or a folder with both closed and read items.



Right-click on a folder to display Mark All Read and Mark All Unread options.






The screenshot shows a 'View' window titled 'All Incidents by Date Created'. It features a search bar, a 'View Tour' button, and a table with columns: Status, Priority, Assignee, Customer, and Description. The table contains five rows of incident data. On the left, there is a sidebar with a list of dates and counts, where '3/28/2016 (8)' is highlighted.


	Status	Priority	Assignee	Customer	Description
<input type="checkbox"/>	Open	Medium	Copeland, Stuart	Johnson, Steve	Check Accounting Application Permis...
<input type="checkbox"/>	Open	Medium	Copeland, Stuart	Johnson, Steve	Check User Account Permissions
<input type="checkbox"/>	Open	Medium	Copeland, Stuart	Johnson, Steve	Check Direct Connection to Server
<input type="checkbox"/>	Open	Medium	Copeland, Stuart	Johnson, Steve	Cannot Connect to Admin Server
<input type="checkbox"/>	Open	Medium	Copeland, Stuart	Garrity, Alison	Check VM Application Permissions







- Use the **dropdown list** to select the view to display; you can enter text in the dropdown selector to display a list of views matching the text you enter. An asterisk next to a title indicates that alerts and/or charts have been created from a view. You can right-click on a view title to add it to the Favorite Views folder. See ["Setting Preferences" on page 51](#) for more information.

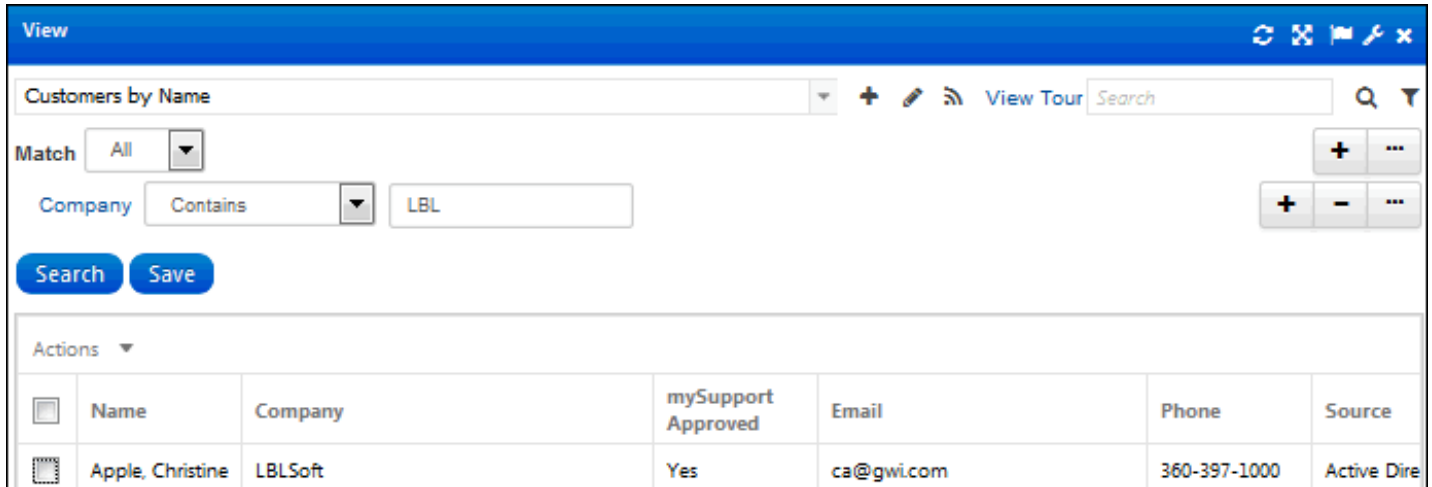
Access the View and Report Designers via the Standard View Designer and Report View Designer options on the Desktop Content menu, the Create  icon in the View Component, the Edit  icon next to views you create or shared views (except those included by default in iSupport) in the View Component, and buttons that display after selecting a view in the Content Manager.

You can open any item in a view by clicking on it, and you can click on a column heading to sort it in ascending/descending order. Views do not refresh automatically when items are created, changed, or deleted. To refresh a view, click on the **Refresh**  icon.

Next  and Previous  navigation options will appear in the ribbon bar when an item is opened from the View component. The Next option will open the next record in the view, and the Previous option will open the previous record listed in the view. This applies to all iSupport record types within folders.

- Use the **Search** field to perform a literal (but not case-sensitive) search for a character string within all data displayed in the current view. To perform a simple search, place the cursor in the Search field, enter the character string, and click the Quick Search  icon. You can search for an incident number in an incident view, even if it doesn't exist in a displayed column.

Click the **Advanced Search**  icon to set criteria for filtering data in a chart. Use the Match *<All/Any>* field to specify whether you want **every** *<field> <comparison method> <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> <comparison method> <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. Click the Save button to enter a name for the search and save it. The Saved Searches  icon will display; hover over it to display saved searches.




View


Customers by Name

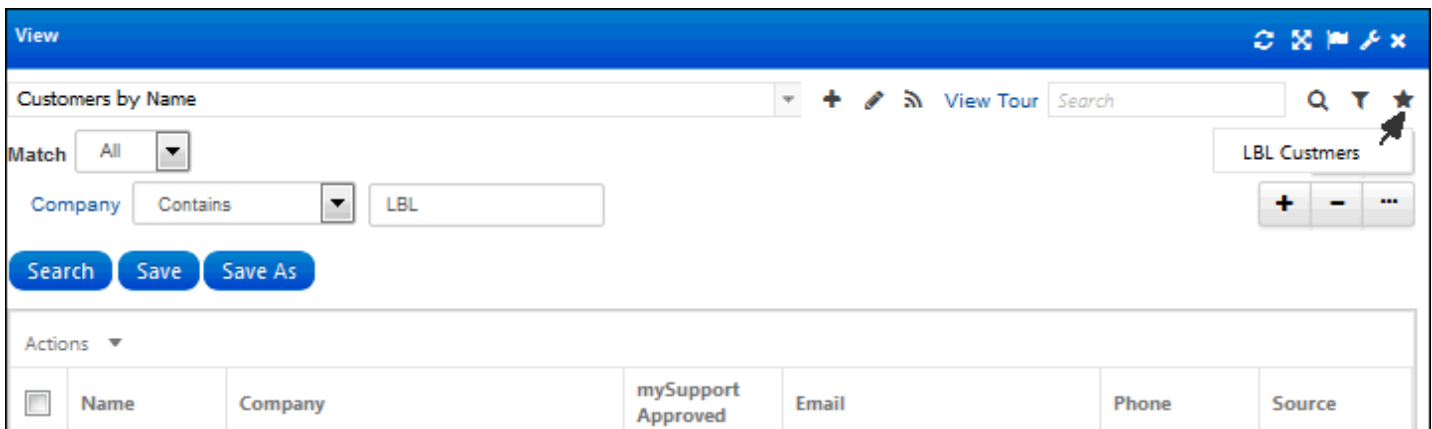
Match All

Company Contains LBL

Search Save

Actions						
	Name	Company	mySupport Approved	Email	Phone	Source
	Apple, Christine	LBLSoft	Yes	ca@gwi.com	360-397-1000	Active Dire

Click the Save button to enter a name for the search and save it. The Saved Searches  icon will display; hover over it to display saved searches.



View

Customers by Name


Match All

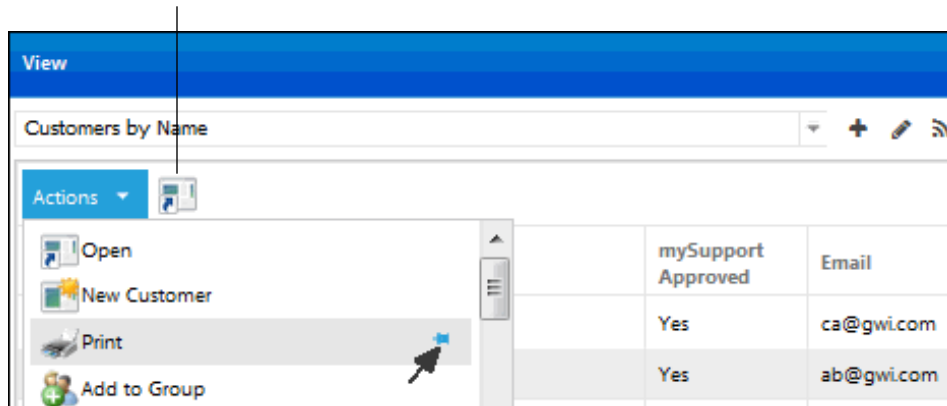
Company Contains LBL

Search Save Save As

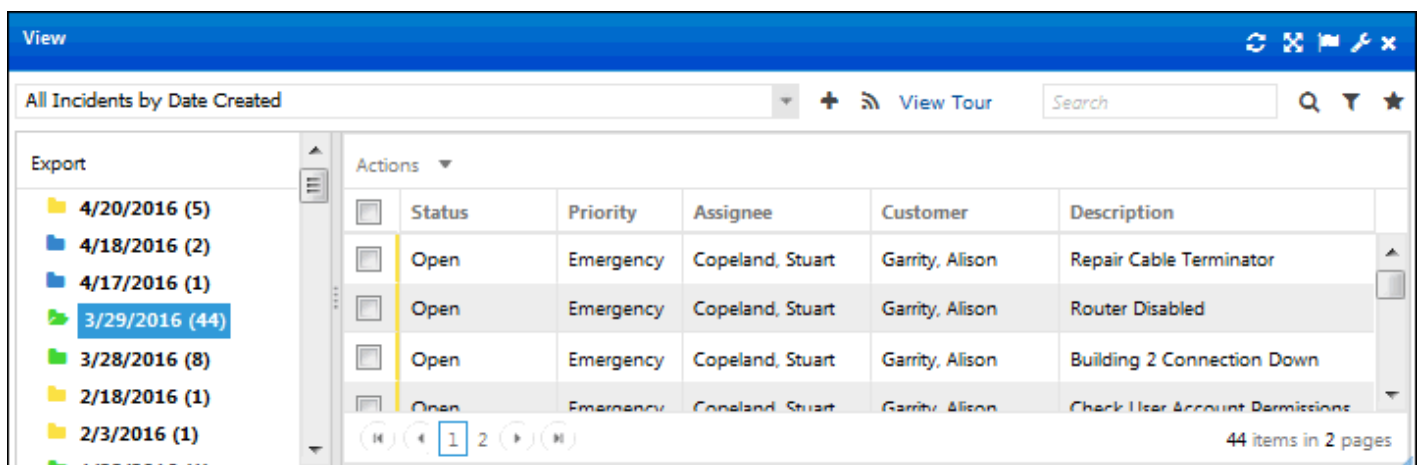
LBL Customers

Actions						
	Name	Company	mySupport Approved	Email	Phone	Source

- Use the **Action dropdown menu** to perform actions such as opening and routing records. Use the Add to Quick Access Toolbar  icon to add icons to the top of a view. You can drag icons to change the order. The view action will remain on the Actions menu with a pin icon for removal from the quick access toolbar.



- You can specify the number of entries per page in the Preferences screen; when the number of entries exceeds the specified number of view entries per page, a set of **view paging links** appear at the bottom of the entries as shown below:



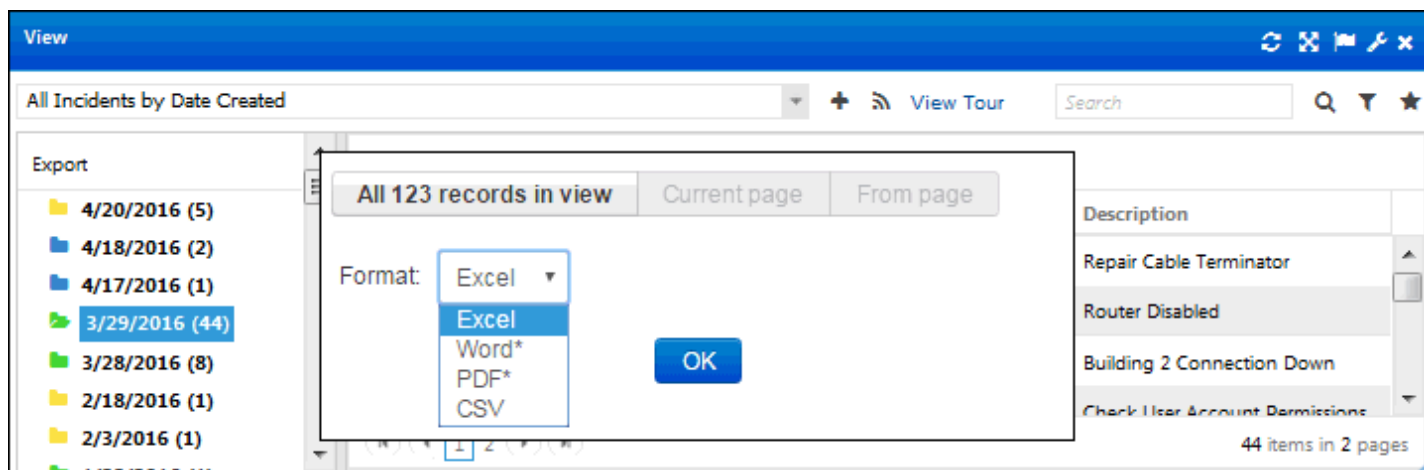
You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page
- Press Alt < to jump back to the first page

Throughout the application, you can use Microsoft® Internet Explorer® keyboard shortcuts such as Ctrl+W to close a window or Ctrl+F to display the Microsoft® Internet Explorer® Find dialog for text searching.


- You can **export view data** in Microsoft® Excel (*.xls) format, Microsoft® Word (*.doc) format, Portable Document Format (*.pdf), or Comma Separated Value Format (*.csv). Comma Separated Value Format is usable with Microsoft Excel and other third party tools. Use the Export option on the Actions menu to export the data

represented in the right frame; you'll be able to export all records at once, the current page, or a range of pages, all based on your current view, search, and sorting criteria.



Use the Export link in the left categorized frame to export all records in the view, preserving any search results.

Note that this feature requires that the Enable 32-Bit Applications setting is enabled for the application pool associated with iSupport. For Microsoft Word and Adobe PDF formats, the horizontal display will be clipped to the display size of the page.

- If the View Subscription agent is enabled, use the **Subscription**  icon in the View component to send an email with an attached file of exported view data to configured recipients on a schedule. The email will be sent via the View Subscription agent, which runs on a five minute interval. You can utilize a saved search filter of the view; note that if using a view with an @My filter (including default views in iSupport with "My" in the title) and a support representative is a selected support representative recipient, the @My filters will apply to the exported view sent to the recipient.

On the Details tab in the Subscription Settings dialog, specify the name and format of the exported data, the address from which the email should be sent (your address or the configured Email Notification Reply To email address), and the subject and body of the email. To apply a filter to the view before the export, select a saved search in the Applied Search field.

The screenshot shows the 'Subscription Settings' dialog box with the 'Details' tab selected. The dialog has three tabs: 'Details', 'Schedule', and 'Recipients'. In the 'Details' tab, there's a 'Format' dropdown set to 'Excel' and an 'Applied Search' dropdown set to 'LBLSoft's Incidents'. Below these, there's a 'Send From' dropdown set to 'Me (bwr@example.com)'. The 'Name' field contains 'Weekly Incidents by Assignee Report for CEO'. The 'Subject' field contains 'Weekly Incidents by Assignee Report'. The 'Message' field contains a text block: 'Hi Connor, Here's a report of incidents by assignee for LBLSoft as of end of day today. Thanks! Barry'.

On the Schedule tab, specify the days and times at which the export email should be sent.

Subscription Settings

Details Schedule Recipients

Time 12:00 AM

☐ Hourly
☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly

Recur every 1 week(s) on

☐ Sunday ☐ Monday ☐ Tuesday ☒ Wednesday
☒ Thursday ☐ Friday ☐ Saturday

☒ No end date
☐ End after 10 occurrences
☐ End by 8/21/2014

Use the Recipients tab to specify support representative(s) and others to receive the email.

Subscription Settings

Details Schedule Recipients

Support Rep Recipients

Additional Email Recipients

Add Rep Add

steve@example.com

Saved subscriptions appear when you click the Subscription icon; use the links to create, send, or delete.

View

All Incidents by Date Created

Create Send Delete

Name	Subject	Applied Search	Next Delivery Date
Weekly Incidents by Assignee Report for CEO	Weekly Incidents by Assignee Report	LBLSoft's Incidents	5/3/2016 12:00:00 AM

Export Actions

All of your configured view subscriptions are listed on the View Subscriptions tab in the Preferences screen, along with links for sending and deleting.

Profile Details

Desktop Notification Center

Desktop Quick Access

Favorite Views

View Subscriptions

Send Delete

Name	Subject	View	Applied Search	Next Delivery Date
Weekly Priority Open Incidents Report	This Week's Priority Open Incidents	This Week's Priority Open Incidents	LBLSoft's Incidents	5/20/2016 5:00:00 PM
Weekly Incidents by Assignee Report	Weekly Incidents by Assignee Report	All Incidents		

Setting Preferences

Use the **Preferences** option on the Profile menu to set display, password, view, signature block, and other options for your Desktop.


The screenshot shows the 'Profile Details' page in iSupport Software. On the left is a sidebar with navigation links: Profile Details (active), Desktop Notification Center, Desktop Quick Access, Favorite Views, View Subscriptions, Signature Block, Personal Rules, and Personal Correspondence. The main content area is titled 'Display Time Zone' and contains the following settings:

- Display Time Zone:** A dropdown menu set to '(GMT-08:00) Pacific Time (US & Canada)'. Below it is a note: 'The Display Time Zone is for display purposes only. Business hours escalation and statistics are based on the assignee's support center time zone.'
- Password:** A text field with a 'Reset' link next to it.
- Google Calendar™ Email Address:** A text field containing 'example@gmail.com'.
- Google Calendar™ Access:** A text field with a 'Grant Access' link next to it.
- Microsoft® Exchange User Name:** A text field containing 'bw@example.com'.
- Microsoft® Exchange Password:** A text field with masked characters '*****'.
- Test Microsoft® Exchange Connection:** A blue button labeled 'Test Connection'.
- Work Day Hours:** Two time pickers. 'Start' is set to 8:00 and 'End' is set to 5:00.
- Text Editor Toolbar:** Three buttons: 'Popup' (highlighted in green), 'Always Show', and 'Never Show'.
- Tab key inserts tabbed spaces in text editor fields:** Two buttons: 'Yes' (highlighted in green) and 'No'.
- Show Seconds on Countdown:** Two buttons: 'Yes' (highlighted in green) and 'No'.
- Default for Follow Option on Discussion Posts:** Two buttons: 'Yes' (highlighted in green) and 'No'.


Setting Your Display Time Zone, Password, and Other Desktop Options

On the Details tab, you can:

- Select the display time zone to use for all date/time stamps. This is for display purposes only on your Desktop client.
- Change your **password** to log into iSupport. The new password will be updated in your Support Representative record.
- If Google Calendar integration is enabled, use the **Google Calendar Email Address** and **Access** fields to enable access to your calendar for scheduling meetings via iSupport entry screens.
- If Microsoft Office Outlook Calendar integration is enabled, use the **Microsoft Exchange User Name** and **Password** fields to enable access to your calendar for scheduling meetings via iSupport entry screens.
- If Microsoft Office Outlook Calendar and/or Google Calendar integration is enabled, use the **Work Day Hours** field to set the time frame during which you are available to have meetings scheduled via iSupport. (Dates/times outside of work day hours will be designated as "Unavailable" in the calendars displayed via iSupport.) Note that work day hours can also be set in the Configuration module.
- Use the **Text Editor Toolbar** field to control whether to display the text editor toolbar when you place your cursor in a toolbar-enabled field (Popup), retain display of the toolbar over those fields (Always Show), or prevent display of the toolbar in those fields (Never Show). Note that if you select Never Show, you can still display the toolbar by clicking the field label link that displays a larger window.

- Select the **Tab Key Inserts Tabbed Spaces in Text Editor Fields** checkbox to enable the Tab key to insert spaces (instead of moving between fields) in fields with a text editor toolbar (such as the Description and Resolution fields).
- Select Yes in the **Show Seconds on Countdown** field to control display of the Seconds portion of the countdown clock that appears when you click the Countdown  icon when time-based rules are active in a work item.
- Select Yes in the **Default for Follow Option on Discussion Posts** field to default the Follow option in the Create Discussion Post and Reply dialogs to Yes. The Follow option enables an email notification to be sent to you when someone replies to one of your posts. See [“Configuring News Feeds” on page 34](#) for more information.

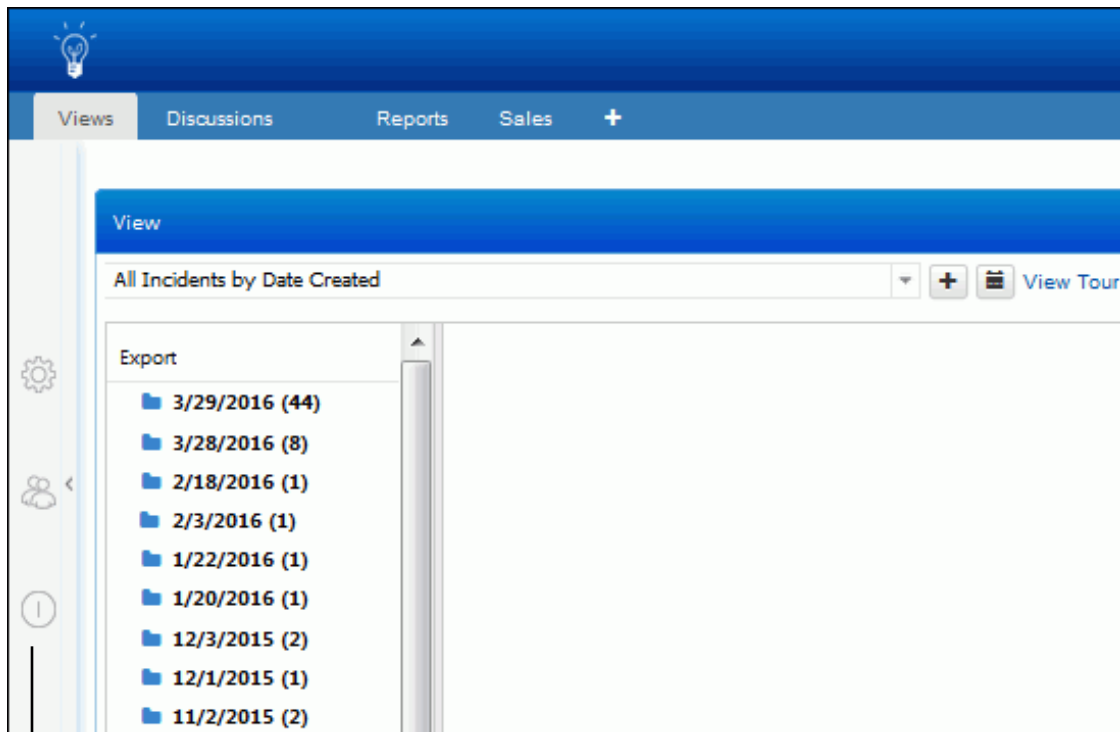
Configuring Desktop Notification Center Preferences

The Desktop Notification Center tab in the Preferences screen enables you to specify whether to display the entry in the Notification Center  list, or both the list and a pop-up. Options will appear for alerts and all work item types with rule functionality. Use the Item Count field to specify the maximum number of entries that should appear in the list at one time.

<div>Profile Details</div> <div>Desktop Notification Center ></div> <div>Desktop Quick Access</div> <div>Favorite Views</div> <div>View Subscriptions</div> <div>Signature Block</div> <div>Personal Rules</div> <div>Personal Correspondence</div>	<h3>Alerts</h3> <div> Number of Items to Display <input type="text" value="5"/> </div> <div> Popup Enabled <div>Yes No</div> </div>
	<h3>Change</h3> <div> Number of Items to Display <input type="text" value="5"/> </div> <div> Popup Enabled <div>Yes No</div> </div>
	<h3>Customer</h3> <div> Number of Items to Display <input type="text" value="5"/> </div> <div> Popup Enabled <div>Yes No</div> </div>
	<h3>Incident</h3> <div> Number of Items to Display <input type="text" value="5"/> </div> <div> Popup Enabled <div>Yes No</div> </div>

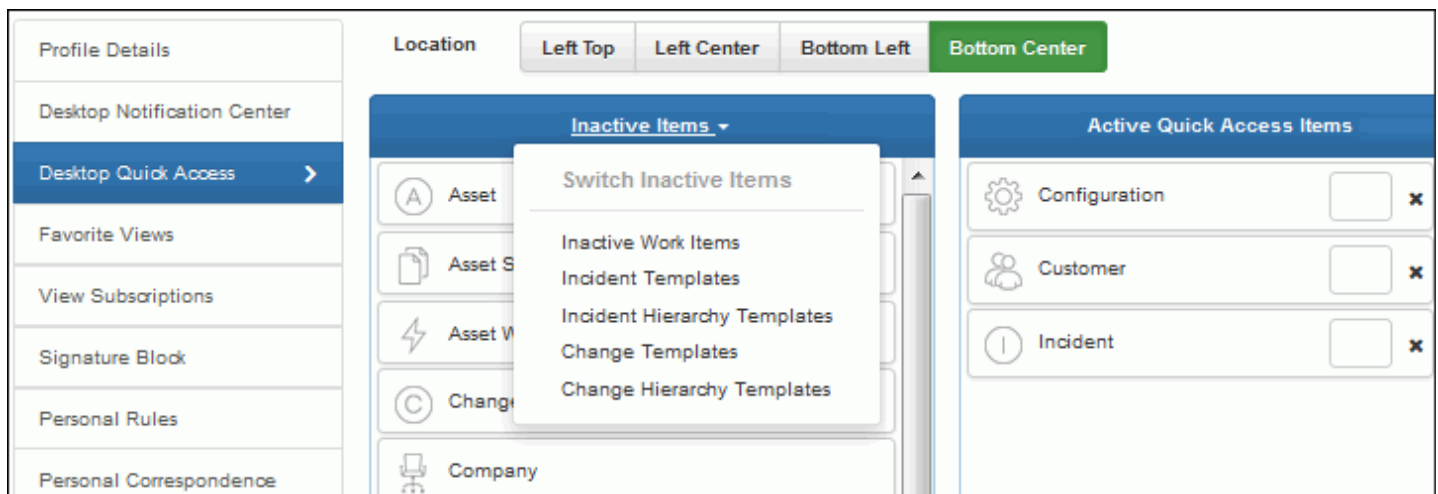
Configuring the Desktop Quick Access Section

Use the Desktop Quick Access tab to add a toolbar with icons for accessing screens in a collapsible bar on the left side of the Desktop.



Customizable Quick Access Section

To add an icon to the quick access section, drag the applicable item from the Inactive Quick Access Items column to the Active Quick Access Items column on the right. You can hover over the Inactive Quick Access Items column heading to display a list of incident/change templates or hierarchy templates and add an icon for creating a work item from a template.

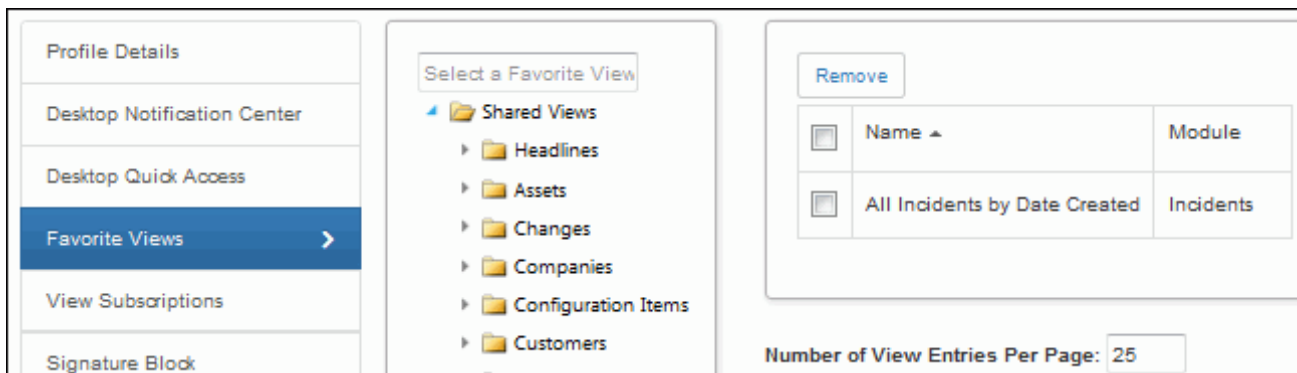


To create a shortcut key, assign an alphanumeric key (0-9 a-z) in the blank field on the item. This key will be used with the Alt key for Internet Explorer, Google Chrome, and Apple Safari, and used with the Alt Shift keys for Mozilla Firefox.

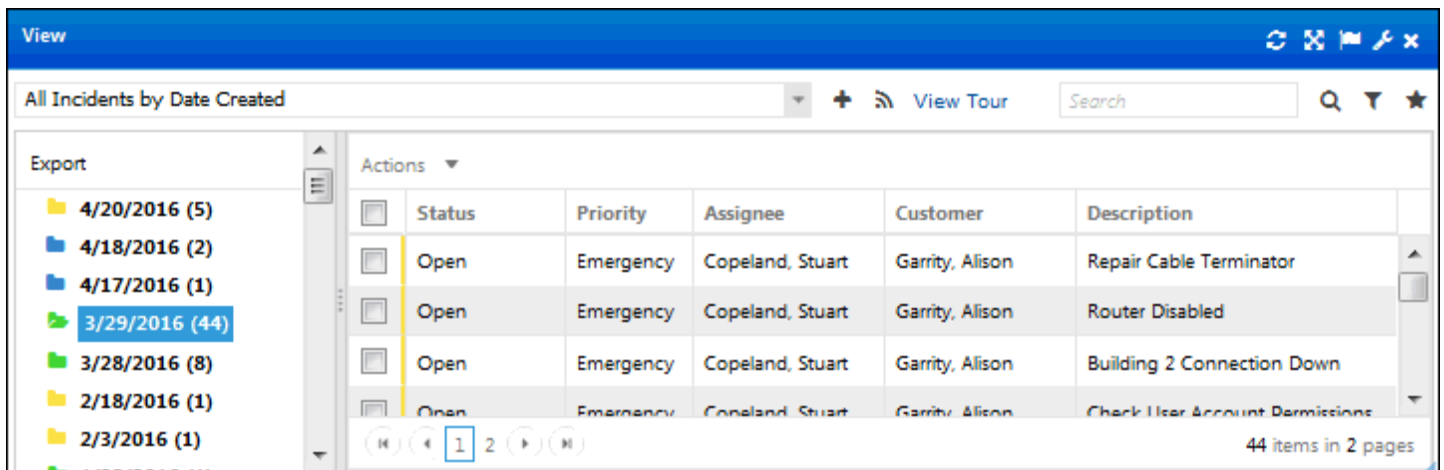
Designating Your Favorite Views

Use the Views tab in the Preferences screen to:

- Specify a set of favorite views; this list typically includes the views that you use most frequently. These views will appear in the Favorite Views folder at the top of the View dropdown list available in the View component and in the View Designer, Chart Designer, and Alert Designer.



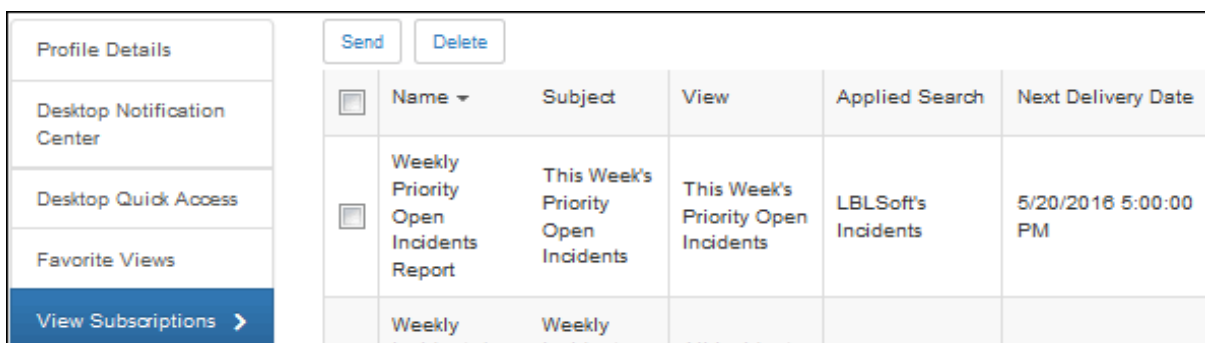
- Specify the number of entries to display at a time. When the number of entries exceeds the specified number of view entries per page in the View component, a set of view paging links appear at the bottom of the entries as shown below:



You can use the following keyboard shortcuts for paged views: Alt + to move forward one page, Alt - to move back one page, Alt > to jump forward to the last page, or Alt < to jump back to the first page.

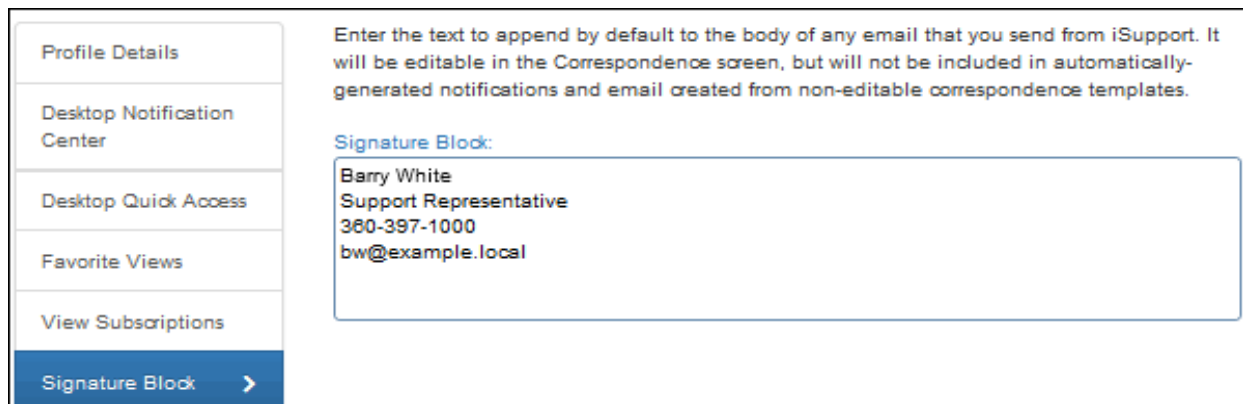
Sending and Deleting View Subscriptions

You can use the **Subscription** icon in the View component to send an email with an attached file of exported view data to configured recipients on a schedule; the email will be sent via the View Subscription agent, which runs on a five minute interval. See [“Views” on page 46](#) for more information. All of your configured view subscriptions are listed on the View Subscriptions tab in the Preferences screen for sending and deleting.



Entering Your Signature Block

Use the Signature Block tab in the Preferences screen to enter text to append to all editable email that you send from iSupport.




The screenshot shows the iSupport Preferences screen. On the left is a sidebar with navigation links: Profile Details, Desktop Notification Center, Desktop Quick Access, Favorite Views, View Subscriptions, and Signature Block (which is highlighted in blue with a right-pointing arrow). The main content area has a heading 'Enter the text to append by default to the body of any email that you send from iSupport. It will be editable in the Correspondence screen, but will not be included in automatically-generated notifications and email created from non-editable correspondence templates.' Below this is a section titled 'Signature Block:' followed by a text input field containing the following text: Barry White, Support Representative, 360-397-1000, and bw@example.local.

You can click the Signature Block link to display a larger window with a text editor toolbar for formatting text.

You do not need to enter blank lines before the text; two blank lines will be inserted before the signature block when a blank correspondence is initiated. If an editable correspondence template is selected in an entry screen, one blank line is inserted automatically before the signature block. You can edit the signature block text in the Correspondence screen if needed.

Creating Personal Rules

If permissions for personal rules are enabled in the Rep Profile screen, use the Personal Rules tab to configure a rule that will evaluate specified conditions when any record of a certain module type (Incident, Problem, Change, or Customer Profile record) is saved and send a notification to the email address in your Support Representative Profile

record if those conditions are met. You can also display an entry in the Notification  list on the Desktop. Note that creation of personal rules is logged in Configuration Audit History.

Use this screen to configure a rule that will evaluate specified conditions when any incident is saved and send a notification to the email address in your iSupport Support Representative Profile record if those conditions are met.

Name

Active ☒ On ☐ Off



Email ☒ On ☐ Off




Subject


Desktop Notification ☒ On ☐ Off














Email Subject

Configure Conditions

Rule type is  




Hours of Operation:   

Match  of the following conditions:



<input type="text" value="Priority"/>		<input type="text" value="Has Changed From"/>		<input type="text" value="High"/>		 
						  
<input type="text" value="Within Business Hours"/>		<input type="text" value="Is True"/>				  

Note that the Hours of Operation field only applies when Within Business Hours is included in a condition.

To configure the conditions on which the notification is sent, 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  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

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



The screenshot shows a configuration interface for a search rule. At the top, it says "Match All of the following conditions:". Below this, there are three dropdown menus. The first dropdown, labeled "Priority", is open, showing a list of fields: Category, Company, Custom Field, Customer, Customer Department, Customer Group, Customer Location, Description, Email - Body, Email - CC, Email - From, Email - Subject, Email - To, Email Account, Event, Incident Status, Incident Status Type, Modified By, mySupport Options, and Priority. The second dropdown is labeled "Is" and the third is labeled "Low". To the right of these dropdowns are buttons for adding (+), removing (-), and editing (three dots) conditions.

In the next dropdown, select the comparison method.

This screenshot shows the same configuration interface as the previous one, but with the second dropdown menu, labeled "Has Changed From", open. The dropdown menu shows four options: Is, Is Not, Has Changed, and Has Changed From. The "Has Changed From" option is selected. The other dropdowns and buttons remain the same.

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

This screenshot shows the same configuration interface as the previous ones, but with the third dropdown menu, labeled "High", open. The dropdown menu shows four options: Low, Medium, High, and Emergency. The "High" option is selected. The other dropdowns and buttons remain the same.

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.

Creating Personal Correspondence Templates

In the Default From Address field, select one of the following for populating the From field in the Correspondence screen: Default to use the address in the Email Notification Reply To field in the Default Outbound Email Settings screen, or Myself to use the email address in your support representative profile.

Default From Address		
<input type="checkbox"/>	Title ▲	Active
<input type="checkbox"/>	Personal Followup Email	Yes

If permissions for personal correspondence templates are enabled in your Support Representative Profile record, use the Correspondence tab to create a correspondence template that will appear only to you in the list of correspondence templates available in iSupport. Note that personal correspondence templates will be available for editing and deletion in the Configuration Audit History screen. Use the Correspondence Template screen to set up a correspondence template to populate fields when sending correspondence via iSupport entry screens or the iSupport Desktop. You can include all aspects of an email, including attachments.

Basics	
Title	Personal Followup Email
List Under	Internal
Active	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
Prohibit Editing	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
Send Priority	<input type="checkbox"/> Low <input checked="" type="checkbox"/> Normal <input type="checkbox"/> High
Set From Address to Sender and Lock	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
Set To Address to Associated Customer	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
CC Others To Notify	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
Include Attachments From Work Item	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
Design Template	Logo Footer ▼

Configuring iSupport Desktop Settings

Use the Options and Tools | Customize | Dashboard Settings screen to designate:

- The colors of dashboard elements

- Header text with links, images and formatting
- The components that all support representatives can add to iSupport Desktop dashboards
- The record types/features involved in global searches performed by all support representatives.


Note that you can use the Support Representative Group screen to override these settings and enable available components and global search record types/features for members of designated groups.



Configuring Colors and Header Text

Use the Basics tab to configure the colors of dashboard elements; select colors via the color picker or enter an HTML color code. Use the No Color icon to remove a selected color and reset back to default.

The screenshot shows the 'Basics' configuration tab. On the left is a sidebar with 'Basics' (selected), 'Allowed in Global Search', and 'Allowed Dashboard Components'. The main area contains settings for colors and gradients. 'Primary Color', 'Secondary Color', and 'Tertiary Color' each have a color picker and a 'Font Color' dropdown set to 'Def'. 'Use Gradients' has 'On' and 'Off' buttons, with 'On' selected. 'Header Text' has a text input field containing 'Health Insurance Forms Due On Friday' and a calendar icon.

Primary - Set the color of the dashboard buttons, lower edge of the Desktop, Chat tab, and component title bar.

Secondary - Set the color of the active tab and the Expand All  icon in configuration.

Tertiary - Set the color of the Search  and Add Dashboard or Component  icons.

Font Color - Set the font color to black or white, or you can select Default to enable the system to, based on the selected color, automatically assign black or white depending on which gives the better contrast. (For example, black will be assigned if yellow is the selected color.) This can be overridden by selecting White or Black.

Use Gradients - Select On to display color gradually from light-to-dark; select Off to display color in a flat, saturated manner.

Header Text - Enter text and images to appear at the top of the Desktop page between the Desktop Create icon and the Profile avatar/name. You can format the text and include images via the text editor toolbar. (Note that the text is white, centered, and selected in this example.)



Specifying Items for Global Search

A global search can be performed via the Global Search component on the Desktop as well as the View | Search feature in the Incident screen. To include a record type or feature in global searches performed by all support

representatives, drag the record type/feature from the Don't Include column to the Include column on the Allowed in Global Search tab.

Colors	Select Entities to add...	+ All	- All
Allowed in Global Search	Headline		X
Allowed Dashboard Components	Change		X
	Knowledge Entry		X
	Incident		X
	Customer		X

Specifying Allowed Components

To make a component available for support representatives to add to their Desktop dashboards, drag the component name from the Don't Include column to the Include column. See [Working With Dashboards](#) for information on each component.

Colors	Select Components to add...	+ All	- All
Allowed in Global Search	Asset Monitor		X
Allowed Dashboard Components	Rep Manager		X
	Calendar		X

Note that some components will not appear until functionality is configured:

- The Calendar component will not appear in this list until Calendar Integration is enabled in the Options and Tools | Integrate | Calendar Integration configuration screen.
- The Mass Mailing Manager will not appear in this list until enabled on the Mass Mailing Approvals tab in the Core Settings | Email screen.
- The Twitter Monitor component will not appear in this list until a Twitter application is configured and enabled for the Desktop in the Options and Tools | Integrate | Social Media Integration configuration screen.
- The Rep Manager component will not appear to a support representative that does not have Rep Manager access enabled in his/her profile.