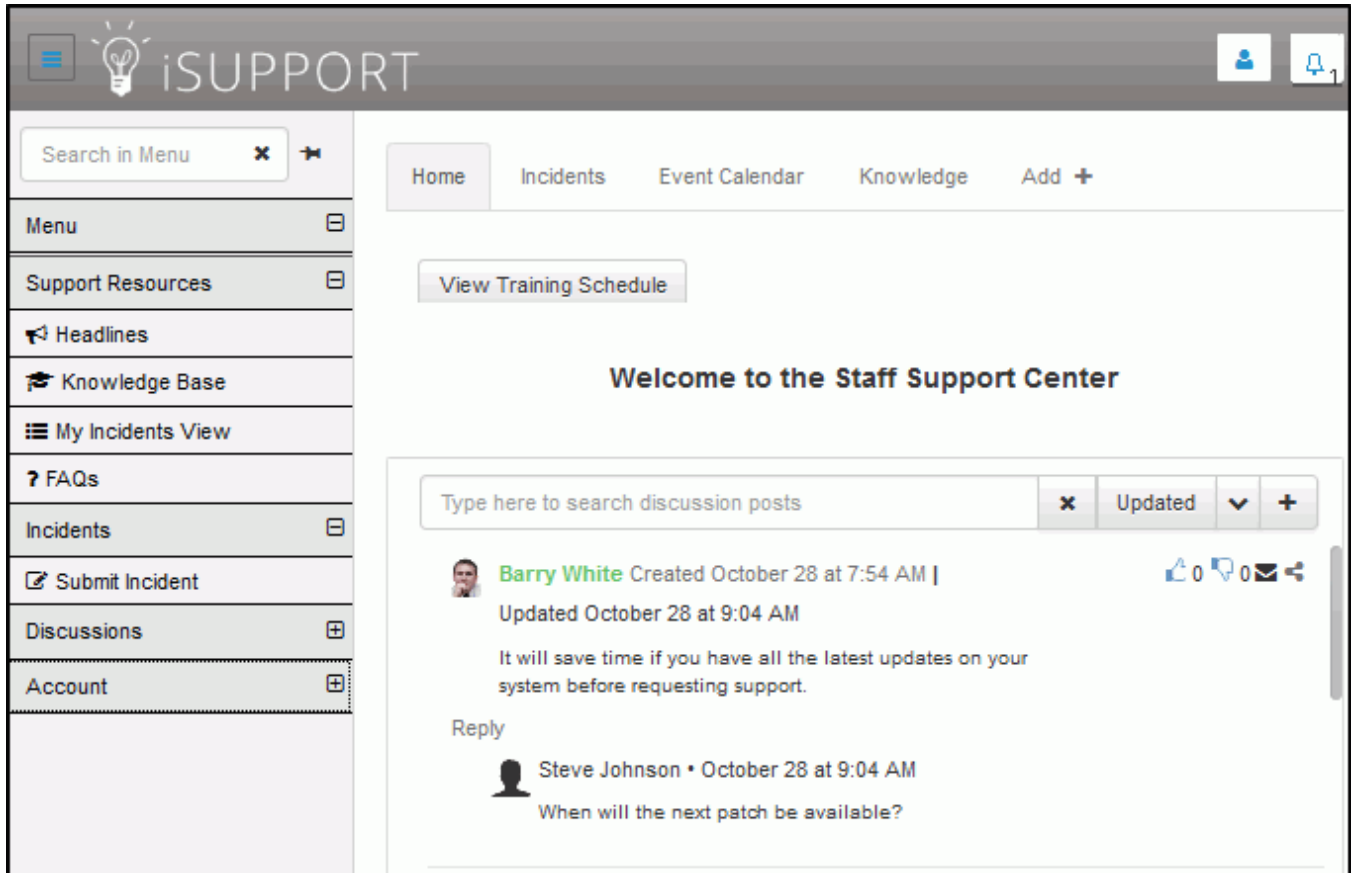




# mySupport Features

mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more.



Everything on a mySupport portal is configurable, including all label and header text, which can be translated. You can configure the feature links, fields that appear for viewing and submitting records, etc. An unlimited number of interfaces can be configured to target different customer groups. iSupport includes several themes; a theme can be easily customized. You can also create different display and submit layouts for work item functionality on a set of mySupport options via the mySupport Layout links included for each module (incident, knowledge, problem, change, purchase, and service contract).

You can enable customers to add and customize dashboards and components that you make available via Options.

mySupport portals can also be accessed via a mobile device; you can create a mySupport options set for mobile devices and assign it to a customer, company, or customer group.



## Feature List

Follow the links below for information on mySupport Portal features.

### General

Login and Logout - see [page 3](#).

Home - see [page 24](#).

Account Settings - see [page 5](#).

Surveys - see [page 8](#).

### Work Item Submission

Easy Submit - see [page 9](#).

Incident/Change/Purchase Submit - see [page 10](#).

Incident/Change Template and Hierarchy Template - see [page 11](#).

Service Catalog/Service Catalog Section - see [page 12](#).

### Work Item Viewing and Searching

Charts - see [page 14](#).

Feeds (Global, Incident, Problem, Change, Purchase, Service Contract, Service Request) - see [page 15](#).

Search/Global Search - see [page 17](#).

Incidents/Changes Pending My Approval - see [page 19](#).

My Archived Incidents News Feed - see [page 19](#).

Search Incident Archive - see [page 20](#).

View/View List - see [page 20](#).

## **Informational Elements**

Embedded Content - see [page 21](#).

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Facebook Monitor - see [page 22](#).

FAQs - see [page 22](#).

Headlines - see [page 23](#).

Help - see [page 23](#).

Knowledge Base - see [page 24](#).

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Rich Text Area - see [page 27](#).

Self Help Guide - see [page 28](#).

Tutorial - see [page 29](#).

Twitter Monitor - see [page 30](#).

## **Communication Features**

Bomgar Chat - see [page 31](#).

GoToAssist - see [page 32](#).

mySupport Chat - see [page 32](#).

Discussion Feed and Discussion Feed List - see [page 36](#).

## **General**

### ***Login (Authentication)***

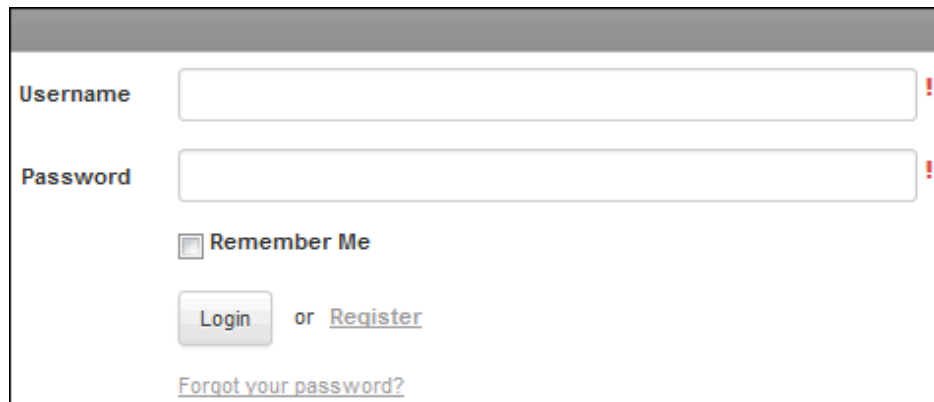
Three types of access can be configured for a mySupport site:

- No required authentication - customers can access all features but must enter a name and email address in order to submit or view incidents and changes; a Customer Profile record will be created after their first incident is submitted.
- Required authentication for the entire mySupport site; if customer or company groups have been created, access can be limited according to group.
- Required authentication for submitting and viewing incidents and changes and submitting a discussion post. If a customer has not logged in, the Reply and Create Discussion Post links will not appear and a login dialog will appear when the customer attempts to submit or view an incident or change.

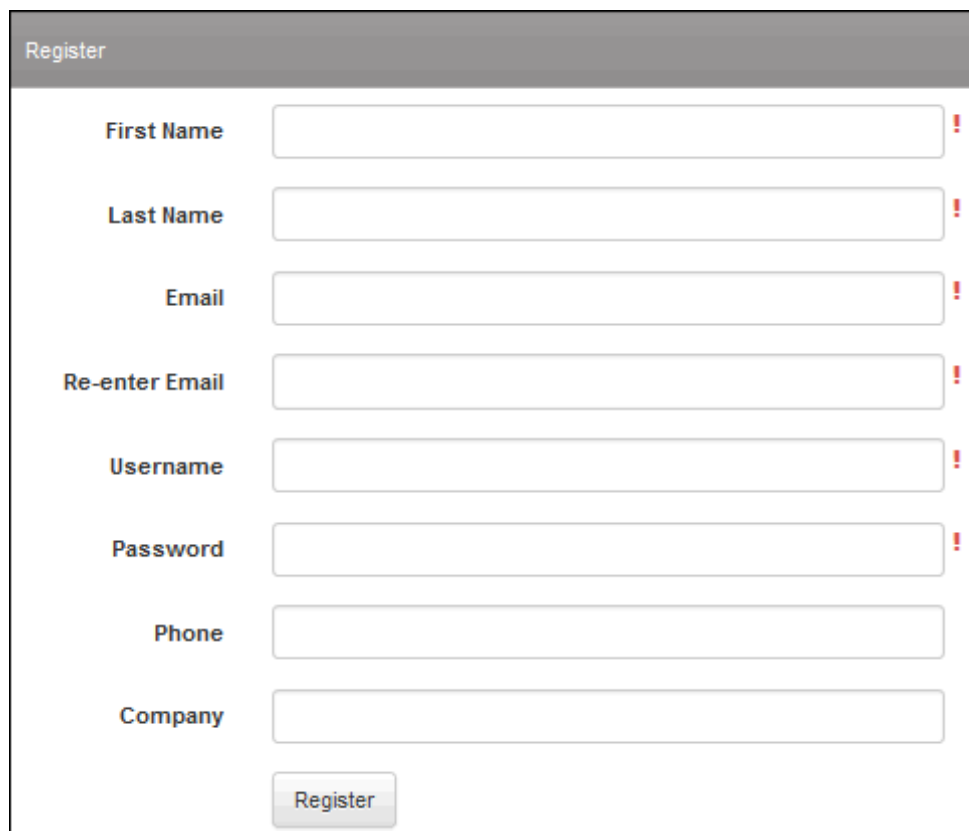
A mySupport options set can be configured as Public Knowledge Only; it will only include a Knowledge page and no access settings will apply.

Authentication can be controlled via Microsoft Authentication or iSupport; a mySupport login can be included in each customer's Customer Profile record or customers can use Account Settings to link an account for authenticating automatically via Facebook or LinkedIn®.

If using iSupport authentication, the login dialog can be configured to include a Remember Me option, Register option, and/or Forgot Password option. (The Password field in the login dialog is case sensitive).

A login dialog form with a grey header bar. It contains two input fields: 'Username' and 'Password', each with a red exclamation mark icon to its right. Below the password field is a checkbox labeled 'Remember Me'. At the bottom, there is a 'Login' button, the text 'or', and a 'Register' link. A link labeled 'Forgot your password?' is positioned at the very bottom.

- The **Register** option enables a customer to enter contact and login information; a Customer Profile record will be created after completion. A customer will not be able to register with the same email address and login name as another customer.


A registration form titled 'Register' in a grey header bar. It features several input fields: 'First Name', 'Last Name', 'Email', 'Re-enter Email', 'Username', 'Password', 'Phone', and 'Company'. Each of the first six fields has a red exclamation mark icon to its right. A 'Register' button is located at the bottom center of the form.

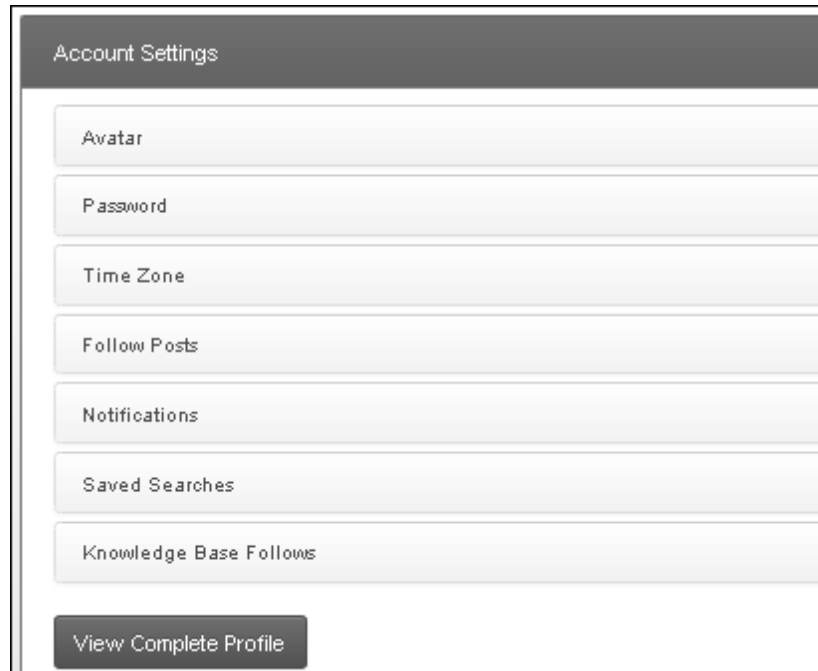
Registration review can be configured; it will disable mySupport access in the customer's Profile record and create an incident via a template.

- The **Forgot Password** link in the Login dialog enables a customer to enter an email address to which an email will be sent with a login and a link for resetting their password. Note that a customer won't be able to change their password if the source of their Customer Profile record is Active Directory, LDAP, or a relational database that is being synchronized with a mapped password.
- The **Remember Me** option places a cookie on the customer's system.

A customer's avatar can be initially populated via Customer Profiles or Active Directory synchronization. The customer can set his/her avatar via Account Settings on a mySupport portal. The avatar will appear in discussion posts and on the Approvals tab in the Incident, Change, and Purchase Request screens if the customer is an approver in an approval cycle or a customer on an incident or change.

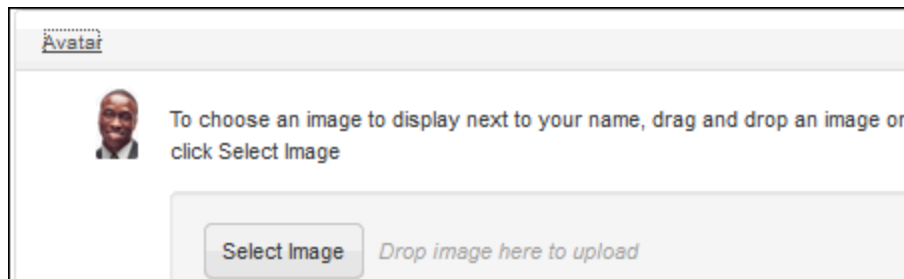
## Account Settings

The Account Settings dialog is accessed via the Account Settings  icon or a navigator link on the portal; customers can set their avatar, password, time zone, default follow option, and notifications, remove saved searches, link an account for authenticating automatically via Facebook or LinkedIn®, and stop following specified knowledge entries.



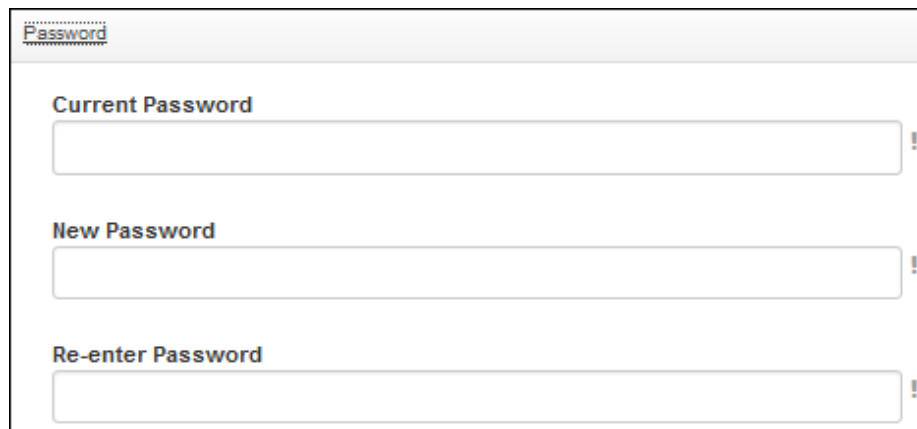
The Account Settings dialog box features a dark header with the title "Account Settings". Below the header, there is a vertical list of settings categories, each in a light gray box: Avatar, Password, Time Zone, Follow Posts, Notifications, Saved Searches, and Knowledge Base Follows. At the bottom of the dialog is a dark button labeled "View Complete Profile".

**Avatar** - This section enables a customer to set his/her avatar that will appear in discussion posts and on the Approvals tab in the Incident, Change, and Purchase Request screens (if the customer is an approver in an approval cycle or a customer on an incident or change). The avatar will be updated in the customer's Profile record.



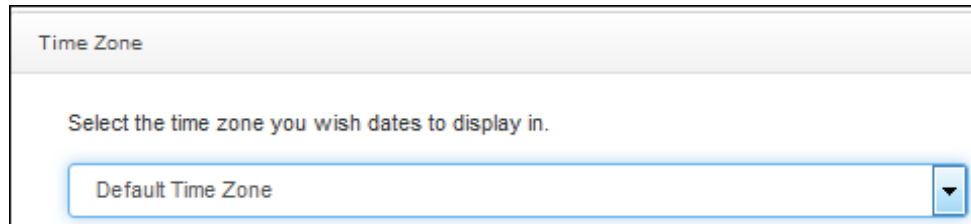
The Avatar section shows a header with the word "Avatar" and a dashed border. Below the header, there is a small circular placeholder image of a man. To the right of the image, the text reads: "To choose an image to display next to your name, drag and drop an image or click Select Image". At the bottom, there is a light gray box containing a "Select Image" button and the text "Drop image here to upload".

**Password** - This section enables a customer to reset his/her password for logging into the portal; it will be updated in the customer's Profile record.



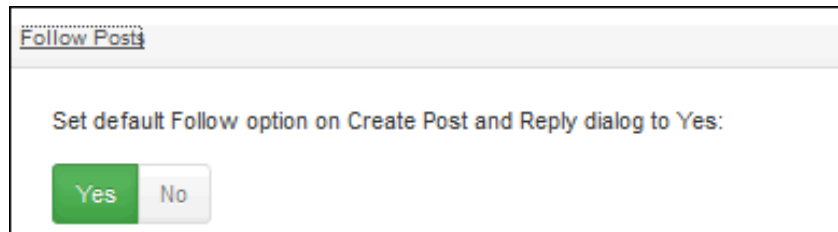
The Password section has a header with the word "Password" and a dashed border. Below the header, there are three input fields, each with a label and a small "i" icon on the right: "Current Password", "New Password", and "Re-enter Password".

**Time Zone** - This section enables a customer to set the time zone for dates that display on the portal.



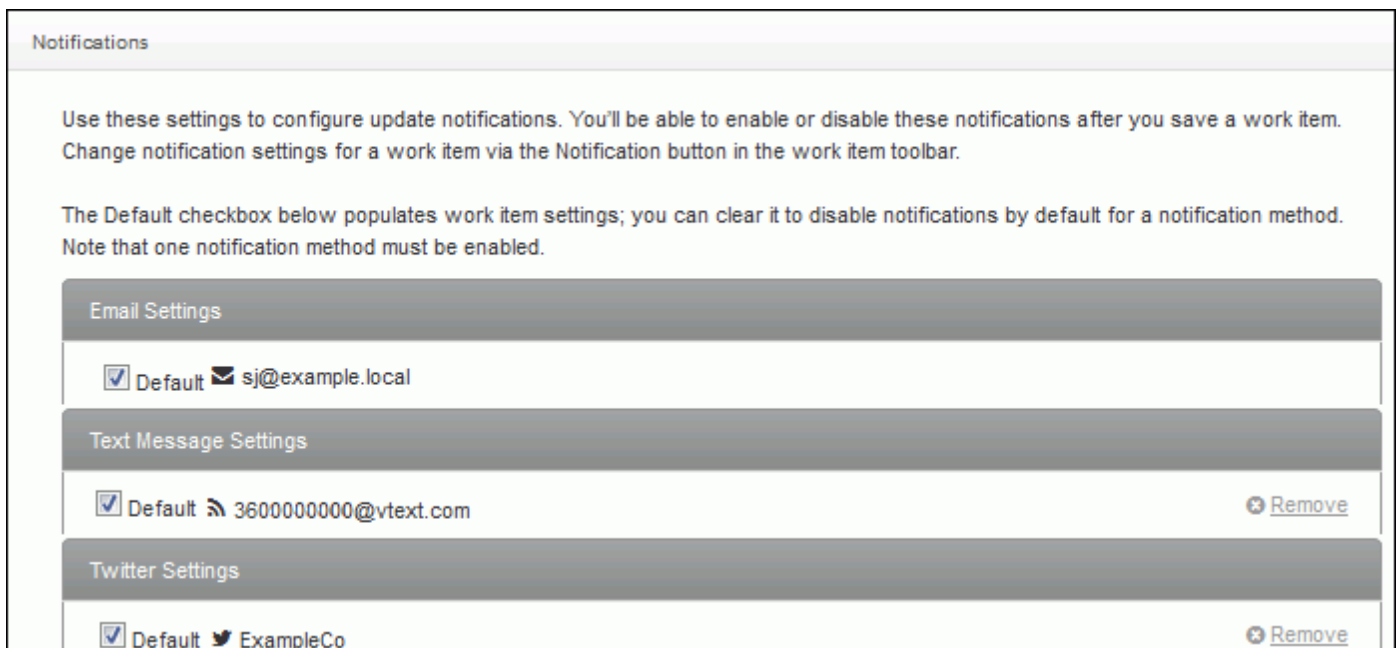
A dialog box titled "Time Zone" with a light gray header. Below the header, the text "Select the time zone you wish dates to display in." is displayed. At the bottom, there is a text input field containing "Default Time Zone" and a blue dropdown arrow on the right side.

**Follow Posts** - The Follow option in the Create a Discussion Post dialog enables an email notification to be sent when someone replies to the post. A user's first discussion post or reply will determine the default for the Follow option in the Create Discussion Post dialog; a customer can set this default to Yes in this section.



A dialog box titled "Follow Posts" with a light gray header. Below the header, the text "Set default Follow option on Create Post and Reply dialog to Yes:" is displayed. At the bottom, there are two buttons: a green "Yes" button and a gray "No" button.

**Notifications** - Customers can use the Notifications section to enable a notification to be sent via email, SMS, and/or Twitter direct message whenever a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests).



A settings page titled "Notifications" with a light gray header. Below the header, there is instructional text: "Use these settings to configure update notifications. You'll be able to enable or disable these notifications after you save a work item. Change notification settings for a work item via the Notification button in the work item toolbar." and "The Default checkbox below populates work item settings; you can clear it to disable notifications by default for a notification method. Note that one notification method must be enabled." Below this text, there are three sections: "Email Settings", "Text Message Settings", and "Twitter Settings". Each section has a "Default" checkbox (checked), a notification icon, and a value. The Email Settings section shows an email icon and "sj@example.local". The Text Message Settings section shows a mobile phone icon and "3600000000@vtext.com", with a "Remove" link. The Twitter Settings section shows a Twitter bird icon and "ExampleCo", with a "Remove" link.

Customers can enable or disable notifications for a work item after saving, and change notification settings for an existing work item via the Notification button in the work item toolbar.

### Submit Successful

This is an automated reply, your request has been received. You may contact iSupport Technical Support at (360) 397-1099 if you have any questions regarding the status of this issue or can provide us with further information to assist in its resolution.

Your reference number is EBHE366AA8.

Notify Me Via

☒ Email

☒ SMS

☒ Twitter

In the Notifications settings, customers configure the phone number and/or Twitter account to which the notification should be sent. If using Twitter, note that the user needs to be following the account associated with the configured Twitter application.

When a customer adds a phone number and selects a configured SMS carrier, the number will precede the carrier's @<domain name> email address to create the SMS gateway for the message to be sent. A text will be sent to the phone email address with an activation code.

The Default checkbox will populate the work item notification settings. Customers can prevent all email notifications by deselecting Default under Email Settings, or prevent email notifications for a work item by deselecting Email via the Notifications button in a work item. Note that one notification option must be enabled.

**Saved Searches** - This section enables customers to remove searches saved via the Save Search feature; for feeds accessed via navigator items, customers can enter a term in the search bar and then click the gear icon to save the text entered with a name and description.

performance

x

⚙

Incident Feed

Sort


Advanced Search


Save Search

 **Barry White** Customer is **Steve Johnson** | Opened on **9/16/2014**

Description is Slow performance on workstation

The saved search will be added to the top of the navigator under the "My Saved Searches" heading.

 iSUPPORT



Search in Menu

x

⚙

My Saved Searches

Incident

Performance search

x

performance

x

⚙

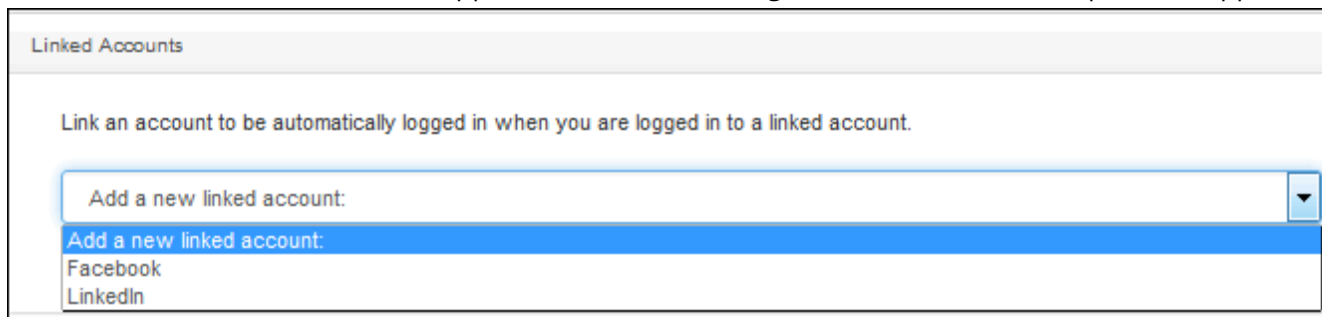
Incident Feed

Sort by Assignee

 **Barry White** Customer is **Steve Johnson** | Opened on **9/16/2014**

Description is Slow performance on workstation

**Linked Accounts** - Customers can use this section to link an account for authenticating automatically via Facebook or LinkedIn®; for example, if the customer is logged into Facebook, the customer will not need to enter an iSupport login. Note that Facebook and LinkedIn applications must be configured in order for these options to appear.



The screenshot shows a web interface titled "Linked Accounts". Below the title is a instruction: "Link an account to be automatically logged in when you are logged in to a linked account." There is a text input field with the placeholder "Add a new linked account:" and a dropdown arrow on the right. The dropdown menu is open, showing the same placeholder text, "Facebook", and "LinkedIn".

**Knowledge Follows** - If the Follow button is enabled for following a knowledge entry, its author, and/or its category, customers can stop following entries in this section.

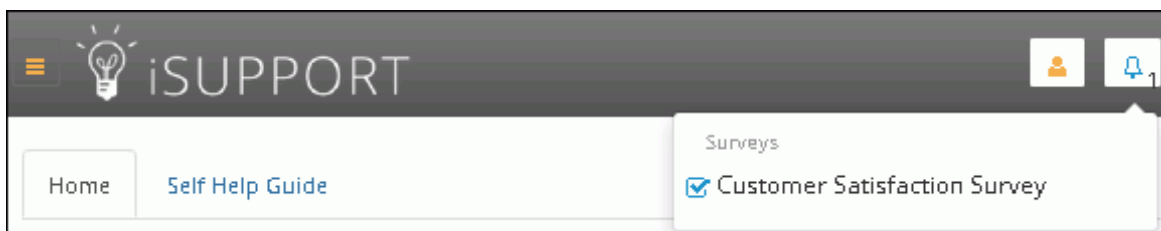


The screenshot shows a web interface titled "Knowledge Base Follows". Below the title is a table with a header row containing the text "Number". The table has one data row with the value "E9H9663528". To the right of the data row is a button with a trash icon and the text "Remove".

**View Complete Profile button** - If a mySupport customer profile layout is configured, this button appears for the customer to view their profile record.

## Surveys


If a survey has been sent to the customer, a notification  1 icon will appear in the upper right corner of the portal.



The screenshot shows the iSupport portal header. The header has a dark background with the iSupport logo (a lightbulb icon and the text "iSUPPORT") on the left. On the right, there are two icons: a person icon and a bell icon with a "1" next to it. Below the header is a navigation bar with two buttons: "Home" and "Self Help Guide". On the right side of the navigation bar, there is a dropdown menu titled "Surveys" with one item: "Customer Satisfaction Survey" with a checkmark icon.



Customers will need to simply click on the survey name to display it.



The screenshot shows the iSupport web interface. At the top, there is a dark header bar with the iSupport logo (a lightbulb icon) and the text "iSUPPORT". To the right of the logo are two icons: a person icon and a bell icon with a "1" next to it. Below the header, the main content area has a title "Survey: Customer Satisfaction Survey" underlined. The first question is "How was the overall service?" followed by the instruction "Select one of the following:". There are five radio button options: "Excellent", "Above Average", "Average", "Below Average", and "Poor". The second question is "How would you rate the knowledge level of the service rep who assisted you?" followed by the instruction "Select one of the following:". There are five radio button options: "Excellent", "Above Average", "Average", "Below Average", and "Poor".

## Work Item Submission

### *Easy Submit*

iSupport's Easy Submit functionality enables customers to use an older version of a device that cannot render HTML5 to submit incidents. The Easy Submit interface contains a Description field along with any fields required for authentication. This functionality utilizes the device's user agent string, which identifies the browser version and

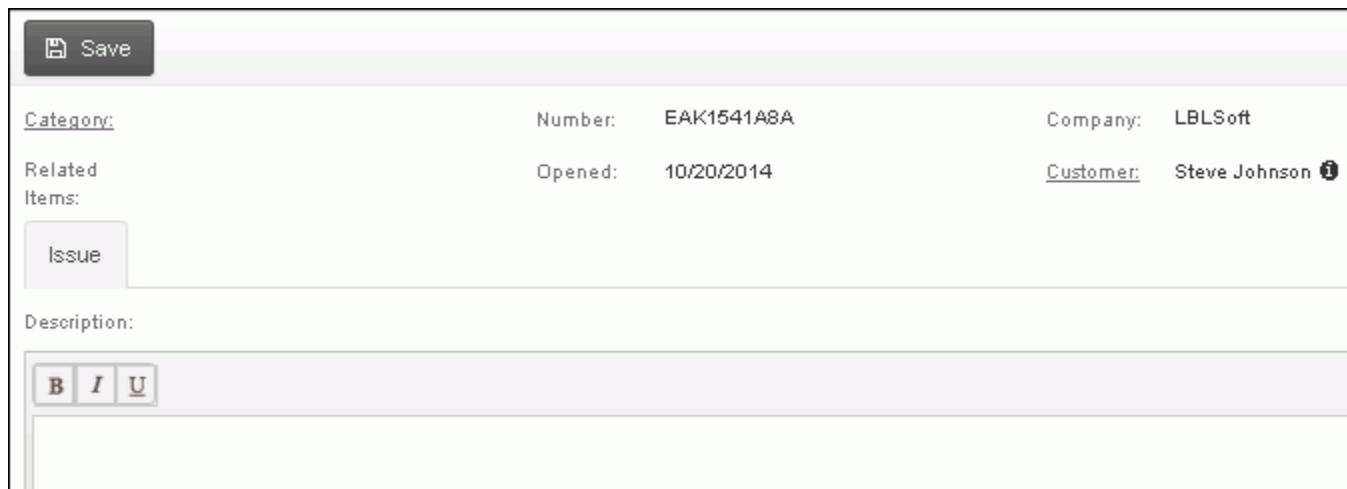
other device details. You can also include an Easy Submit link on a mySupport portal navigator to display the Easy Submit interface.

A screenshot of a mobile application interface for submitting an issue. The status bar at the top shows 'Verizon', signal strength, time '8:40 AM', and battery '83%'. The app header features a lightbulb icon, the text 'iSUPPORT', and a blue menu icon. Below the header is a dark grey bar with the text 'Submit your issue'. The form contains several input fields: 'First Name', 'Last Name', 'Email', 'Company', 'Location', 'Phone', and 'Description'. Each field has a small exclamation mark icon to its right. At the bottom of the form is a 'Submit' button.

You can enable the customer to enter a company, location, and/or phone number via the Easy Submit interface, and use an incident template to apply to incidents created via the Easy Submit interface on a mobile device.

### ***Incident/Change/Purchase Submit***

You can create links for customers to submit an incident, change, or purchase request. The fields and tabs included on the Submit screen are configurable, as well as the default mySupport-submitted record assignee and the text to display after submission. Authentication (logging in) is required in order to submit and view incidents, changes, and purchase requests.

A screenshot of a web-based incident submission form. At the top left is a 'Save' button with a floppy disk icon. Below it, the form is organized into sections. The 'Category:' section is on the left, with a 'Related Items:' tab below it. To the right of 'Category:' are three fields: 'Number:' with value 'EAK1541A8A', 'Company:' with value 'LBLSoft', and 'Opened:' with value '10/20/2014'. Further right is the 'Customer:' field with value 'Steve Johnson' and an information icon. Below these fields is a large 'Description:' text area with a toolbar containing 'B', 'I', and 'U' icons. The 'Issue' tab is currently selected.

You can enable the category picker for a template and require that the user selects the lowest level category.

Custom fields can be individually enabled or disabled for display on a mySupport portal. Note that If a call script is enabled for a category set, it will not display on a mySupport portal. Rule groups for customers, companies, or category sets are applied to mySupport-submitted incidents; the default rule group will only be applied if none of the

provided category levels, the customer, or the company are associated with a rule group. However, if a rule group is associated with a template, the template rule group will override any rule groups assigned to the category, customer, or company. Any rule group associated with the lowest level of category will be applied; if none is associated, the next (higher) category level is searched, and so on.

If configured, an **Update** button will appear after an incident or change has been submitted. A customer can use it to enter text that will be included in the work history. Customers can select the history types to display via the **Change History Settings** button on the toolbar. The **Approvals** button will appear if the approval button is configured in the mySupport Options screen and a customer's work item is pending approval or a customer is the current approver due to specify a verdict. Verdict options are Approve, Decline, or Comment Only. A customer can cancel approvals if the customer is assigned to the work item. The Approval Graph button displays approvers in the cycle.

The screenshot shows the 'Approvals' dialog box. At the top, it states 'This Incident is pending your approval.' Below this is a dropdown menu labeled 'Select an Action' with a blue highlight on the 'Approve' option. Other visible options are 'Decline' and 'Comment Only'. At the bottom right of the dialog are 'Submit' and 'Close' buttons. In the background, the main interface shows a toolbar with buttons like 'Update', 'Change History Settings', 'Print', 'Approvals', 'Approval Graph', and 'Start New Chat Session'. The incident details show 'Category: Hardware', 'Priority: High', and a description 'Slow performance on workstation'.

If you have an unlimited support representative license, a customer can be designated as a mySupport Editor via the Customer Profile screen. This enables the customer to choose another customer for a new incident and edit the incidents and FAQs that the customer has access to view.

### ***Incident/Change/Purchase Template and Incident/Change Hierarchy Template***

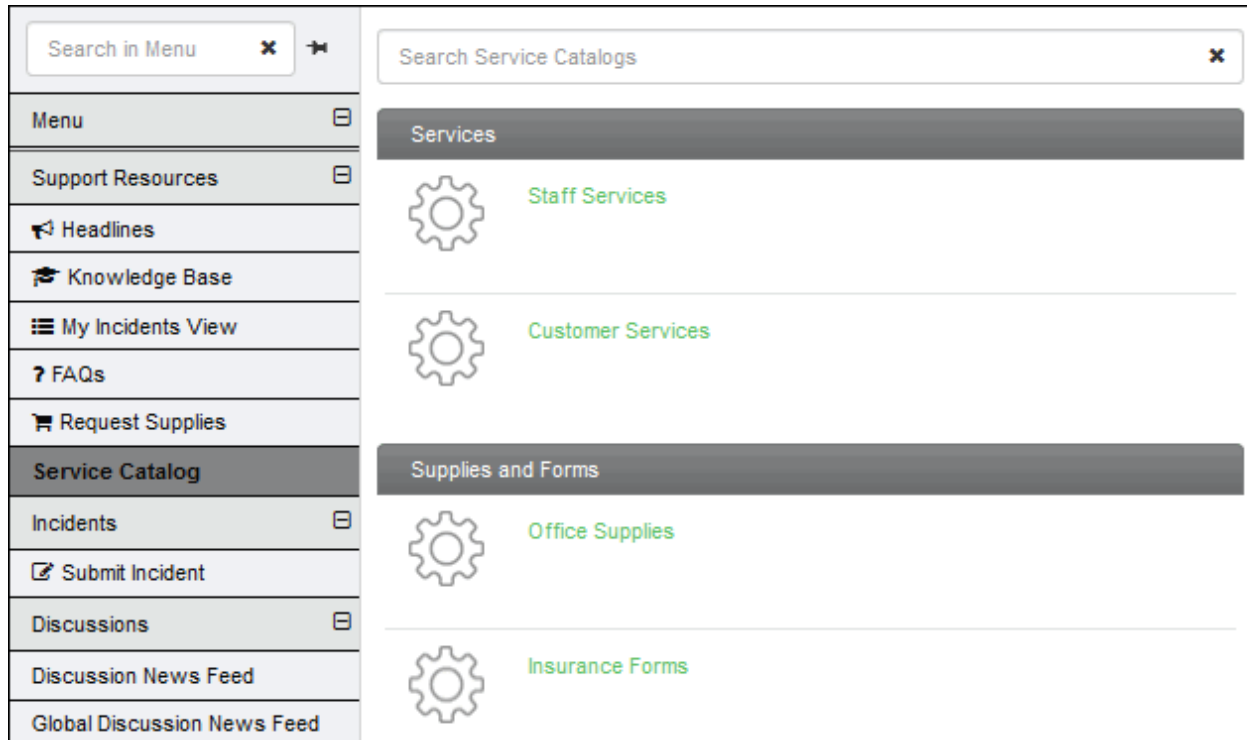
You can create links for customers to submit an incident, change, or purchase request using a template that will populate fields. Note that if an auto-close incident template is included on a mySupport portal, the incident status will *not* change to Closed; the incident will remain open. Custom fields can be individually enabled or disabled for display on a mySupport portal.

The screenshot shows the iSupport software interface. On the left is a 'Menu' sidebar with a search bar and a list of items: 'Support Resources', 'Account', 'Incidents', 'Web Site Access Request' (highlighted with a mouse cursor), 'Incident News Feed', and 'Submit Incident'. On the right is a form titled 'Save' with fields for 'Number: EAK9346584', 'Company: LBLSoft', 'Opened: 10/20/2015', and 'Customer: Steve Johnson'. Below these is an 'Issue' section with a 'Description' field containing the text 'Please provide access to your web site.' and a rich text editor with 'B', 'I', and 'U' buttons.

You can include links for customers to submit an incident or change using a hierarchy template that will populate fields and create a hierarchy of records. Note that only a top-level template will appear when the link is clicked.

## Service Catalog

Service Catalog functionality is available if you have the Service Desk edition. It enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. An entire service catalog or only one section can be included on a mySupport portal; access to a service catalog section or individual service request entries may be restricted to specific customer and support representative groups. An entire service catalog with two sections is shown in the example below.



Customers can click on a section to display service catalog section entries and submit a change or purchase request. Service catalog entries are entered in the Configuration module; each section contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, links to web pages, and access to

custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

Customer Services

Customer Services (\$200....

Accounting Applicatio...

Request Security Cle...

Accounting Training (...)

Company Orientation

Staff Orientation (\$50...

System Overview (\$...

Workstation Configura...

Laptop - Windows

Laptop - Macintosh

Register for Webinar

Back

Preview

Submit

Name:

Accounting Training

Asset Type:

Training

Quantity:

1

Vendor:

Technology PCS (Company)

Rate:

\$100.00

Delivery Date:

11/7/2014

Amount:

\$100.00

Expected Date:

Comments:

Apply

A link to a specific service can be configured; note that display of the dollar amount next to an entry is controlled by the Can View Service Cost field in the customer's Profile record. The Total Cost amount includes the cost of all selections (including line items from the purchase template).

The Service Request News Feed displays the changes created by catalog submissions in one feed and the purchase requests created by catalog submissions in another feed.

Search in Menu

Support Resources

Service Request News Feed

Change Service Requests

Purchase Service Requests

Service Catalog

Staff Discussion News Feed

Knowledge Base

How can we help?

Change Feed

Sort by Assignee

EAWA195761

Assignee is | Customer is Alison Garrity | Opened on 10/31/2014

Description is Upgrade Memory

Results are

Update • View all 2 entries

Barry White • 59 minutes ago

- Set Reason To: Workstation running slowly

- Set Description To: Upgrade Memory

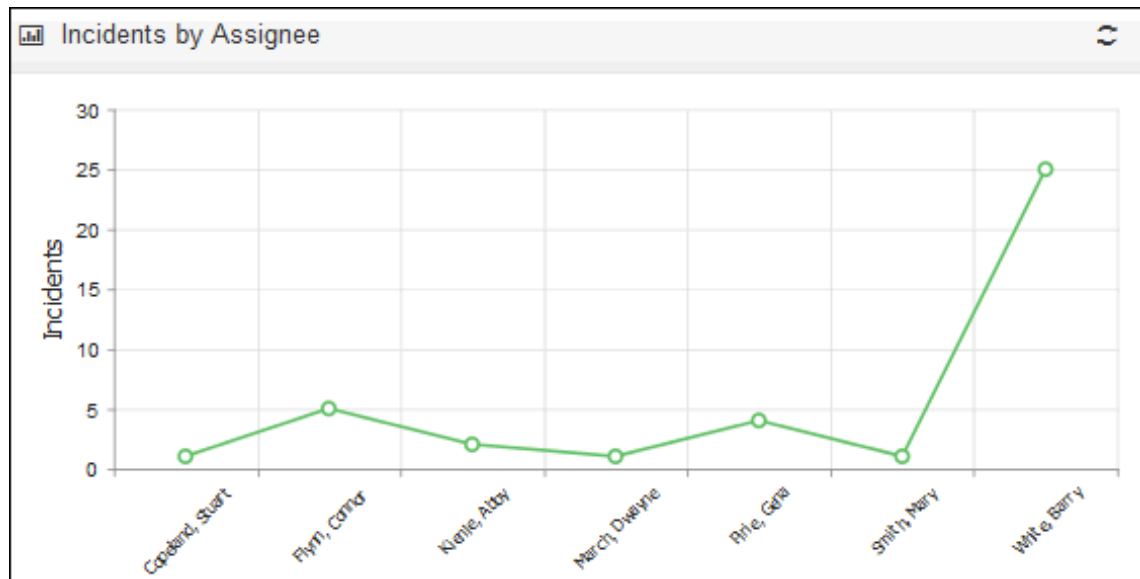
- Set Priority To: Emergency

## Work Item Viewing and Searching

Existing iSupport data can display on a mySupport via navigator links, components, or configured mySupport views accessed via navigator links and components.

## Chart/All Charts

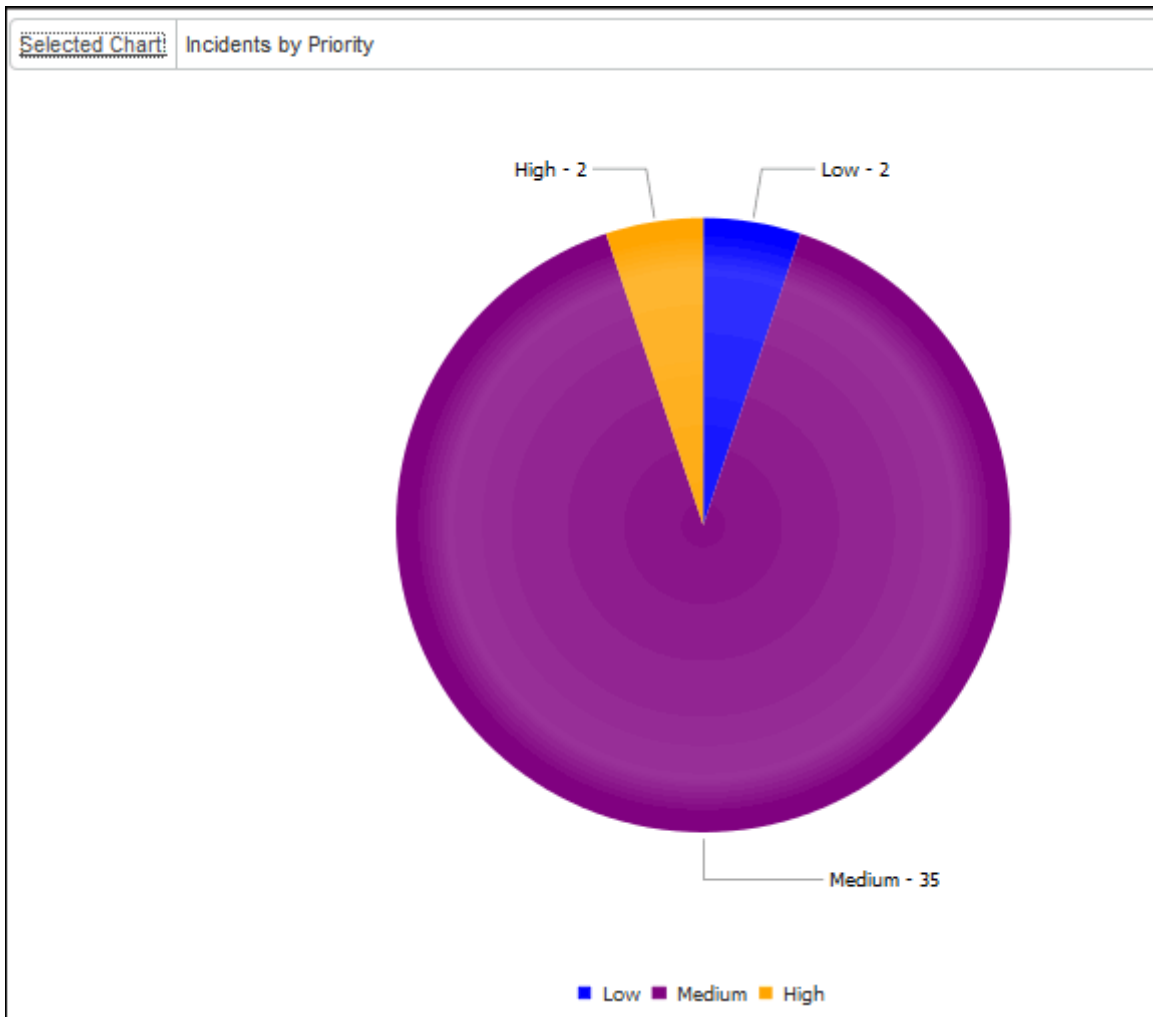
The Chart and All Chart features display a single mySupport chart or a list of mySupport charts configured via the Chart Designer. A single chart can be configured to display via a navigator link or a component.



You can include a navigator link for displaying a list of all mySupport charts configured via the Chart Designer.

Selected Chart:	None
<div><div>Incidents</div><div>Incidents by Assignee</div><div>Incidents by Priority</div><div>Open Incidents</div></div>	

The selected chart will fill the content frame.



## Feeds

iSupport includes feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. Items appear according to the date and time modified. If enabled to appear, work items will appear with the work item type, elapsed time since the item was modified, description, and a history entry. The **Update** link can be included for entering text that will be included in the work

history. The type of history entry, fields to appear after the work item type, and sort order are configurable. For feature information on discussion feeds, see [“Discussion Feeds” on page 36](#).

The screenshot displays three distinct feed panels in the iSupport Software interface:

- Incident Work Item Feed:** This panel features a search bar with the text "How can we help?". Below it, a post by Barry White indicates a customer named Steve Johnson, opened on 9/16/2014. The description mentions "Slow performance on workstation" and "Resolution is". An "Update" button and a link to "View all 3 entries" are present. A subsequent update from Steve Johnson on September 16 at 10:04 AM lists actions: "Set Priority To: Low", "Set Status To: Open", and "Set Customer To: Steve Johnson".
- Global Feed:** This panel shows a post by Steve Johnson from Wednesday at 11:13 AM, categorized as "Knowledge" with the entry "QuickBooks". It includes a "Reply" button and a link to "View all 4 entries". Below this, an incident by Barry White from September 30 at 8:53 AM is shown, with the description "Phone screen freezes." and a link to "View all 4 entries". A subsequent update from Barry White on the same date lists changes: "Changed Category From: Services To: Unlisted/Other" and "Changed Description From: test To: Phone screen freezes".
- Discussion Feed:** This panel has a search bar labeled "Type here to search discussion posts". It displays a post by Steve Johnson created and updated on Wednesday at 11:13 AM, categorized as "Knowledge Entry" with the entry "QuickBooks". It includes a "Reply" button and a link to "View all 4 entries".


For work item feeds:




- For changes, purchase requests, and service contracts, depending on what is specified in a customer's profile record, the news feed displays items for a customer or the customer's company, department, location, or group.
- Customers can open a work item in a feed by clicking on it; the fields that appear in the work item display screen are configurable via mySupport layouts and settings.
  - For changes, an Update button can be included in the work item display screen for entering text that will be included in the work history.
  - For Problem records, a Create Incident button can be included for a customer to submit an incident that will be related to the problem. The text in the Short Description field will be included by default in the Description field in the Incident record.



- The Service Request News Feed displays the changes created by catalog submissions in one feed and the purchase requests created by catalog submissions in another feed.

## Search/Global Search

A search bar will appear above work item feeds; if configured, links will appear for creating an incident, displaying a self help guide (the link will appear by default as "I Need Help"), and/or creating a discussion post. The customer can click the Configure  icon to use Advanced Search and Save Search options.



The **Advanced Search** option enables a customer to filter the search by selecting the fields to be searched and by entering conditions using Boolean operators. The Filters section enables customers to refine a search by selecting a field, comparison method (Or or Not), and value applicable to the selected field. The Add Condition  and Remove Condition  icons can be used for each condition line, and the Add Condition Group  icon can be used to enable a set of conditions to be executed together in a group.

The Fields section will include all of the fields configured for work item display; customers will select the fields to be searched.

The screenshot shows the 'Advanced Search' interface. At the top is a 'Filters' section. Below it is the 'Fields' section, which contains links for 'Select All' and 'Clear All'. A list of fields is displayed, each with a checked checkbox: Number, Customer, Status, Closed, Category, Resolution, Customer Group, Customer Department, Assignee, Company, Modified, Priority, Description, Global Custom Fields, and Customer Location.

The **Save Search** option enables a customer to save the text. After entering a name and description, a My Saved Searches option will appear in the navigator.

The screenshot shows the iSupport software interface. On the left is a sidebar with a search bar and a list of options: 'My Saved Searches', 'Incident', and 'Issues With Printing'. The main area displays a search result for 'print'. Below the search bar is an 'Incident Feed' section with a 'Sort by Assignee' dropdown. The first incident is by 'Barry White' for customer 'Steve Johnson', opened on 9/16/2014. The description is 'Cannot print using Accounting printer.' and the resolution is 'is'.

An **RSS Feed**  icon will appear after a search is saved; a customer can click on it to display the RSS Feed dialog. RSS feeds send notifications when the contents of a custom feed change; for example, an RSS feed can be used to send updates to subscribers that don't have access to the mySupport site. The customer will copy the URL listed and then click the Subscribe  icon. The notification sent is configurable.

**Global Search** can be included in a component or above the global news feed. It enables a user to enter a problem description, search text, question, or post, and search work items, knowledge entries, and discussion posts for that text. A keyword search will be performed; all searches will be based on all fields configured for work item display. A list of words excluded in the search can be configured; this list will be utilized after two words are entered. If a phrase is entered in quotes, the text within the quotes will be used in the search. Results will appear below the search bar; if

configured, links will appear for creating an incident, displaying a self help guide (the link will appear by default as "I Need Help"), and/or creating a discussion post.

✕🔍

Displayed below are the results we found for your search criteria. Didn't find what you're looking for?

🗨️ Create a Post 🆘 I Need Help ➕ Create an Incident


Knowledge Entry (2)

Incident (1)

**Unlisted/Other**

Description is Error - Prints spooler error appears on printer.  
Resolution is Clear the print spooler. To do this you must have Computer Administrator status.

[View all 2 entries](#)


 Barry White • September 17 at 9:40 AM

- Changed Issue Description **From:** Error - Printing error appears on printer. **To:** Error - Prints spooler error appears on printer.

### *Incidents/Changes/Purchase Requests Pending My Approval*


This feature displays in a feed the incidents, changes, and purchase requests that are pending approval by the logged-in customer. The customer can click on a work item to open and approve it.

Incidents Pending My Approval FeedSort by Customer ⬆️ ↻

 Status is **Open** | Priority is **High** | Customer is **Al Brown** | Opened on **10/20/2014** | Assignee is **Barry White**

Description is Please provide access to your web site.  
Resolution is

[Update](#) • [View all 4 entries](#)

 Barry White • 21 minutes ago

### *My Archived Incidents*

This feature displays in a feed the archived incidents for the logged-in customer.

✕⚙️

My Archived Incidents Feed

Sort by Assignee ⬇️ ↻

**Archived Incident Barry White** Assignee is **Barry White** | Customer is **Garrity, Alison**

Description is Slow performance on laptop.  
Resolution is Upgraded operating system.

**Archived Incident Barry White** Assignee is **Barry White** | Customer is **Garrity, Alison**

Description is Slow performance on workstation.  
Resolution is Workstation had a virus; removed virus and updated virus protection software.

## Search Incident Archive

This option enables a customer to search and display archived incidents. Note that a blank feed with a search bar initially displays when a customer first accesses this feature.

Search Incident Archive Feed

Sort by Assignee ▼ ↻

**Archived Incident Barry White** Assignee is **Barry White** | Customer is **Garrity, Alison**

Description is Slow performance on workstation.

Resolution is Workstation had a virus; removed virus and updated virus protection software.


**Archived Incident Barry White** Assignee is **Barry White** | Customer is **Garrity, Alison**

Description is Slow performance on laptop.

Resolution is Upgraded operating system.

## View/All Views/View Lists

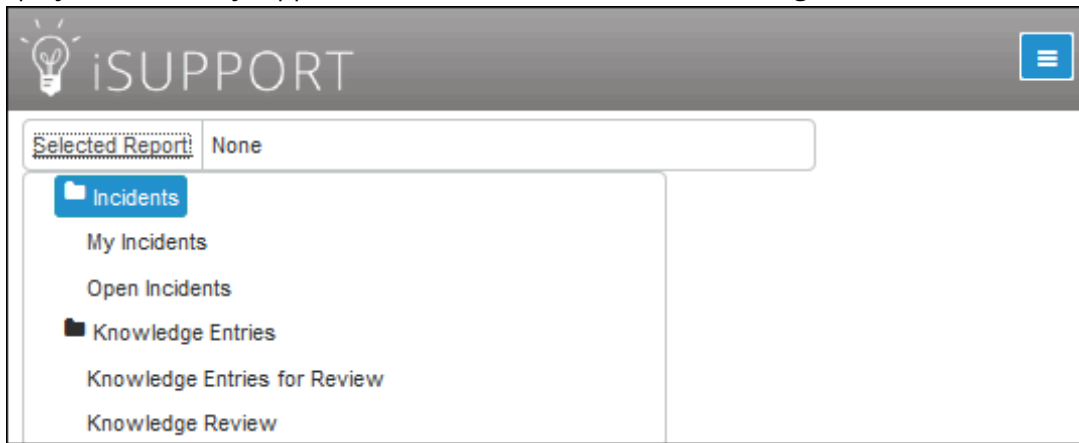
You can display a single mySupport-enabled view or report view via a navigator link.

<div> iSUPPORT <span>👤 ⚙️</span></div>			
<input type="text" value="Search in Menu"/>			
Support Resources			
Headlines			
Knowledge Base			
My Incidents View			
	Date Created	Description	Assignee
	10/24/2014	Please provide access to your web site.	White, Barry
	10/24/2014	Slow performance on workstation.	White, Barry
	10/20/2014	Cannot Connect to Admin Server	White, Barry
	10/20/2014	Please provide access to your web site.	White, Barry

- You can display a single view or report view via the View component. This component will be labeled as the Report component in the Designer list for customers that can add it to dashboards.

Incidents by Assignee		
<div><div>Copeland, Stuart (1)</div><div>Flynn, Connor (5)</div><div>Kienle, Abby (2)</div><div>March, Dwayne (1)</div><div>Pirie, Gena (4)</div><div>Smith, Mary (1)</div><div>White, Barry (18)</div></div>	Number	Description
	E13A61174A	Where do I access the shared
	E13B3466AA	Cannot connect to the network.
	E13B35519A	Please provide access to your web
	E13B361774	Slow performance on workstation.
	E13B362873	Check Direct Connection to Server
	E13B362874	Check User Account Permissions
	E13B363489	Please create an email account for me.
1		1 - 32 of 32 items

- You can display a list of all mySupport-enabled views via the All Views navigator link.



Note that SSRS reports can only display on a mySupport portal via a URL navigator link or the Embedded Content component.

These features use the display layout settings in Options for the fields that appear when a customer opens a record. Note that if a customer is able to add dashboards and components, the component is called "Report" in the Designer list.

## Informational Elements

### *Embedded Content*

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



### *Event Calendar*





Use event calendars to schedule meetings and other events for display in mySupport and Desktop components. You can enable RSVPs and specify a maximum number of attendees, and support representatives can use event

calendars on the Desktop. Note that customers should set their time zone via Account Settings; the time zone of the server will be used by default on the Event Calendar.

Event Calendar					
Today	Monday, October 06, 2014 - Friday, October 10, 2014				
	Mon 10/06	Tue 10/07	Wed 10/08	Thu 10/09	Fri 10/10
all day		Staff meeting			
7:00 AM					
8:00 AM					
9:00 AM					

## Facebook Monitor

The Facebook Monitor component monitors a Facebook page and displays posts and comments from it.

f Facebook Monitor	
	<p>Beta two is now live and customers/prospects can check out mySupport v14 at <a href="http://ow.ly/Bs2wd">ow.ly/Bs2wd</a>. #RaisingTheBar #ItIsWhatWeDo</p> <p>@iSupport Software September 12 at 5:31 PM • comments (0)</p>
	<p>Internal upgrade to v14 beta 1 is underway. The future of mySupport is about to become reality! #helpdesksoftware <a href="http://ow.ly/ASyeS">http://ow.ly/ASyeS</a></p> <p>@iSupport Software August 29 at 2:38 PM • comments (0)</p>
	<p>Which free classes will you attend in September? <a href="http://ow.ly/AHnt5">http://ow.ly/AHnt5</a></p> <p>@iSupport Software August 25 at 10:52 AM • comments (0)</p>
	<p>Premium products cost money but add value. If you dont believe, call your free #HelpDeskSoftware support department. <a href="http://ow.ly/AxwhU">http://ow.ly/AxwhU</a></p> <p>@iSupport Software August 20 at 10:46 AM • comments (0)</p>

## FAQs

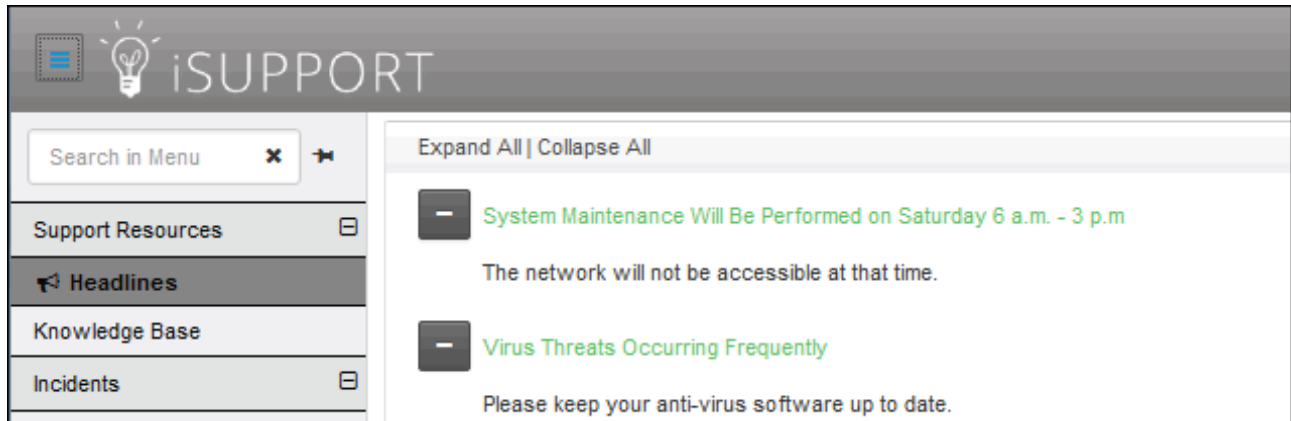
FAQs that are enabled for display to customers (via the FAQ entry screen) can be included on a portal via a navigator link or in a component.

Software 1	Administration 2
What are the Technical Support department hours?	
Technical support (by phone or chat) is available Monday through Friday 6am-5pm Pacific Standard Time.	
When is the company holiday party held every year?	

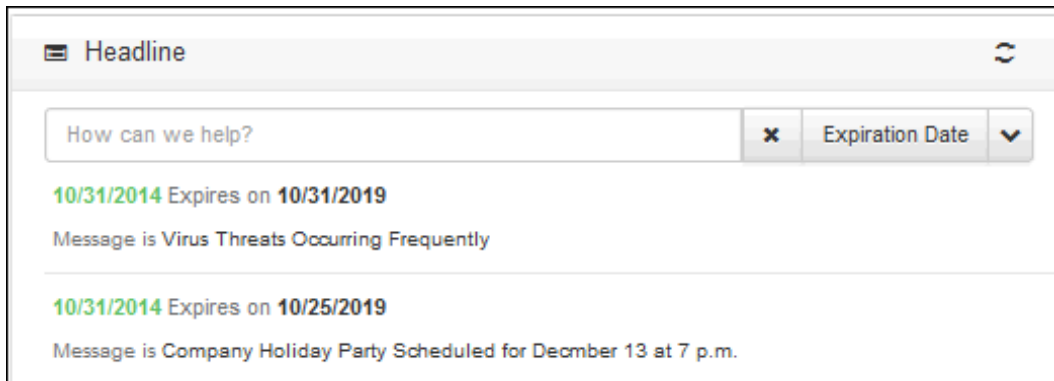
## Headlines

Include headlines that are enabled (via the Headline entry screen) for display to customers using:

- A navigator link, which includes headlines in a list that can be expanded and collapsed.



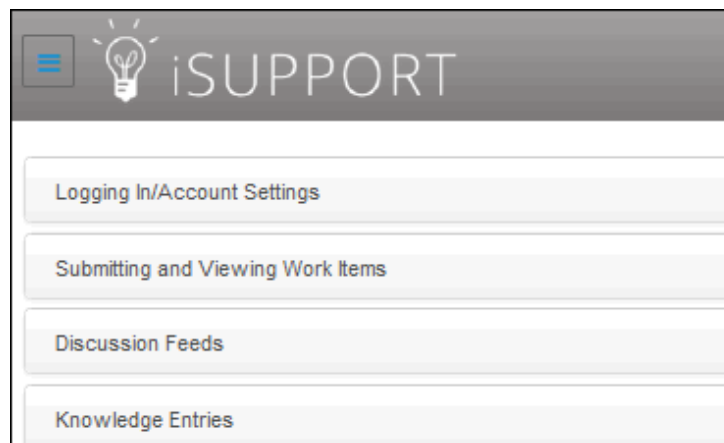
- A component, which can include a search and sort bar as well as a customizable feed layout.




Note that support representatives can publish headlines to Twitter if Twitter integration is enabled.

## Help

The Help option includes default text for the mySupport portal with general information on mySupport options; you can customize this information without purchase of a source code license via the Resource Editor. The Resource Editor (in the Utilities subdirectory) enables you to customize the text that appears for elements on a mySupport portal such as labels, messages, and the Help page. This text is stored in application resource (.resx) files that are named according to application functionality. It works with the cultural settings on the customer's browser and system; if a module is translated and a customer has the matching cultural setting, the translated settings will appear.



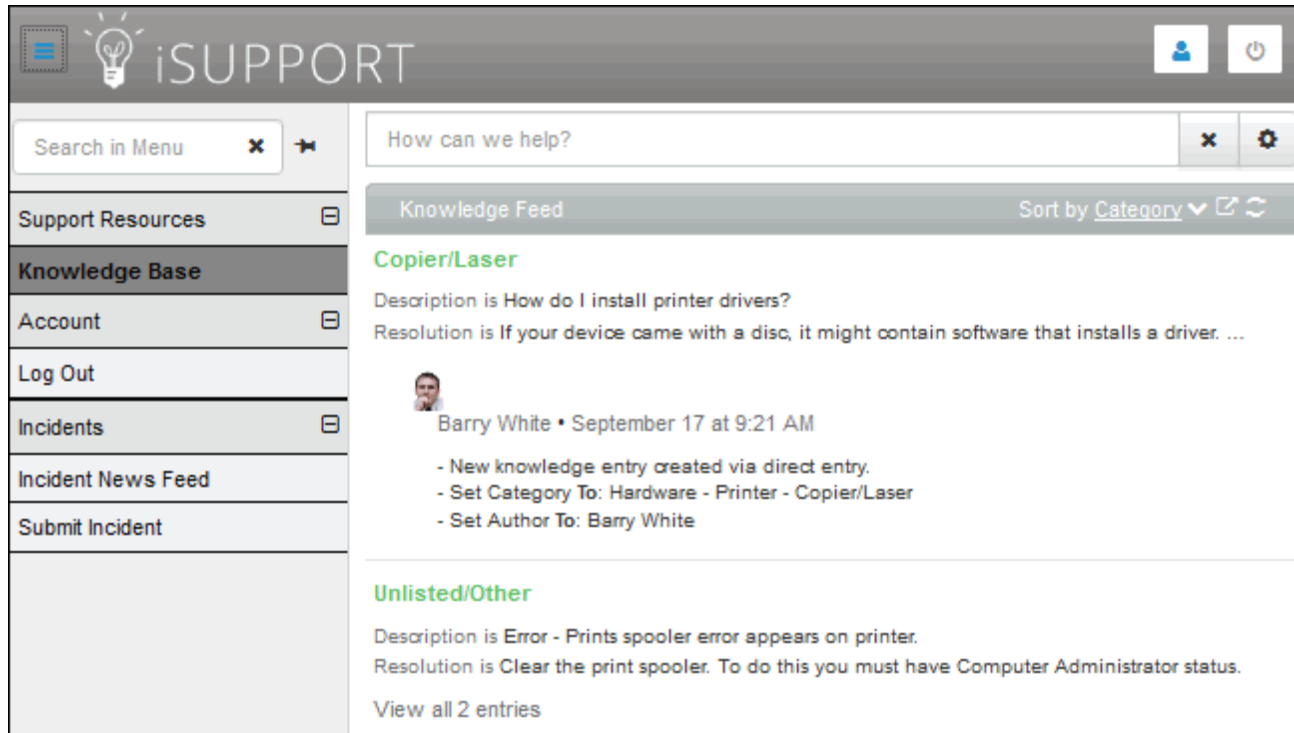
## Home

The Home option hides the navigator and displays the dashboard set as default in the Edit mySupport Dashboard dialog displayed via the Edit  icon. The logo you set in the upper left corner also displays the dashboard set as default.

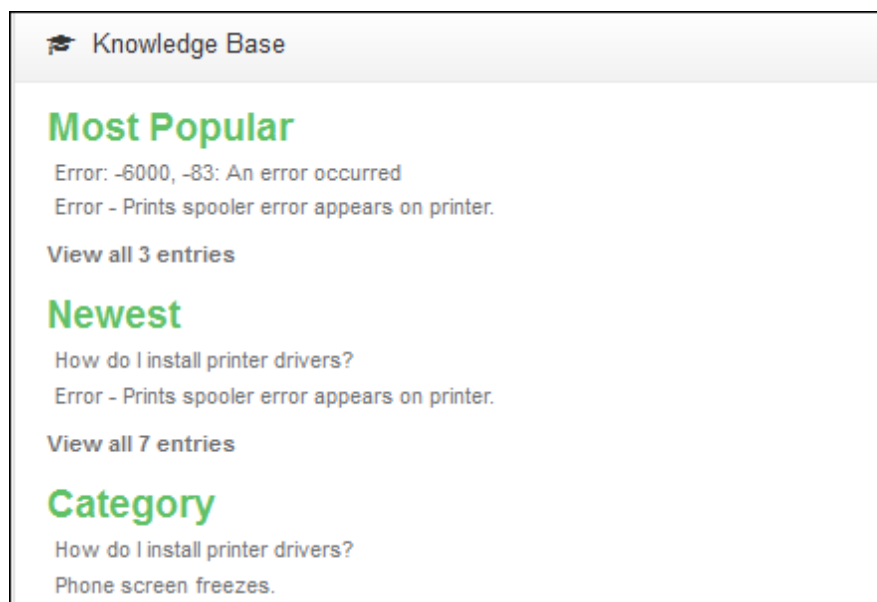
## Knowledge Base

You can display knowledge information on mySupport in feeds and in components.

- From a navigator link, you can display a full-screen feed of knowledge entries with a search bar at the top.



- In the Knowledge Base component, you can display knowledge entries in sections for Most Popular, Newest, and Category.



Knowledge entries can be designated with a status of Approved External - Requires Authentication or Approved External; knowledge entries appear on a mySupport portal according to assigned status. A mySupport portal designated as Public Knowledge Only will include only knowledge entries with an Approved External status.



If configured, customers can follow a knowledge entry, its author, and/or its category (if categories are enabled to display on a mySupport portal).

The screenshot shows a Knowledge Entry interface. At the top, there are buttons for 'Print', 'Like', 'Create Post', and 'Follow'. The 'Follow' button has a dropdown menu open, showing options to follow the 'Knowledge Entry', 'Author', or 'Category'. Below the buttons, the entry details are displayed: Number: E9H9663528, Opened: 9/17/2014, and Category: (empty). To the right, it says '2 users like this' and 'Rule Group:'. Below the details, there are tabs for 'Details', 'Resources', 'Attachments', 'Discussion Posts' (which is active), 'Facebook Comments', 'History', and 'Custom'. Under the 'Discussion Posts' tab, there is a post by 'Steve Johnson' with the message 'Please add more detail to this entry.' and a 'Reply' button.

- Following a knowledge entry will cause updates to reload the entry in the Global News Feed.
- Following an author will cause any entries created by the author to appear in the Global News Feed.
- Following a category will cause any entries created with the same category to appear in the Global News Feed.

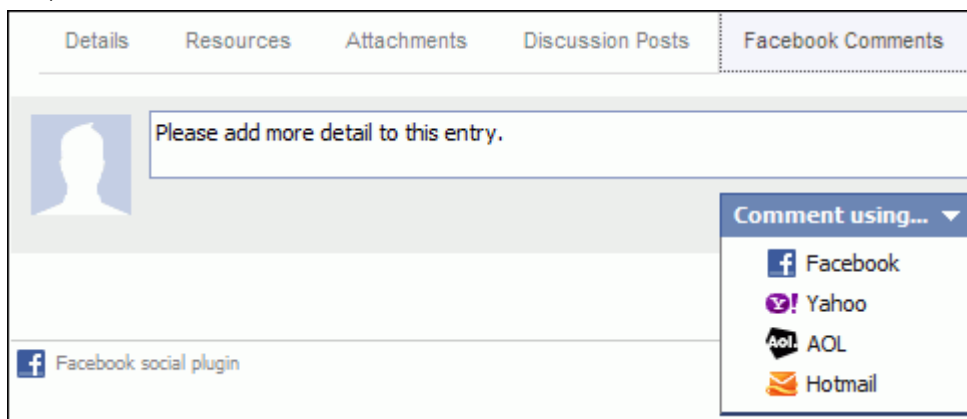
If the Facebook Comments tab is configured to appear in the Knowledge Entry screen, and a customer is currently logged into Facebook, he/she can enter a comment and click the Comment button to post it to the knowledge entry. If you select Post to Facebook, it will also go on your Facebook wall with a link back to the knowledge entry.

The screenshot shows the 'Facebook Comments' tab selected. It features a text input field with the placeholder 'Add a comment...'. Below the input field, there is a checkbox labeled 'Post to Facebook' which is checked. To the right of the checkbox, it says 'Posting as Lisa Kimery (Not you?)'. At the bottom right, there is a 'Comment' button.

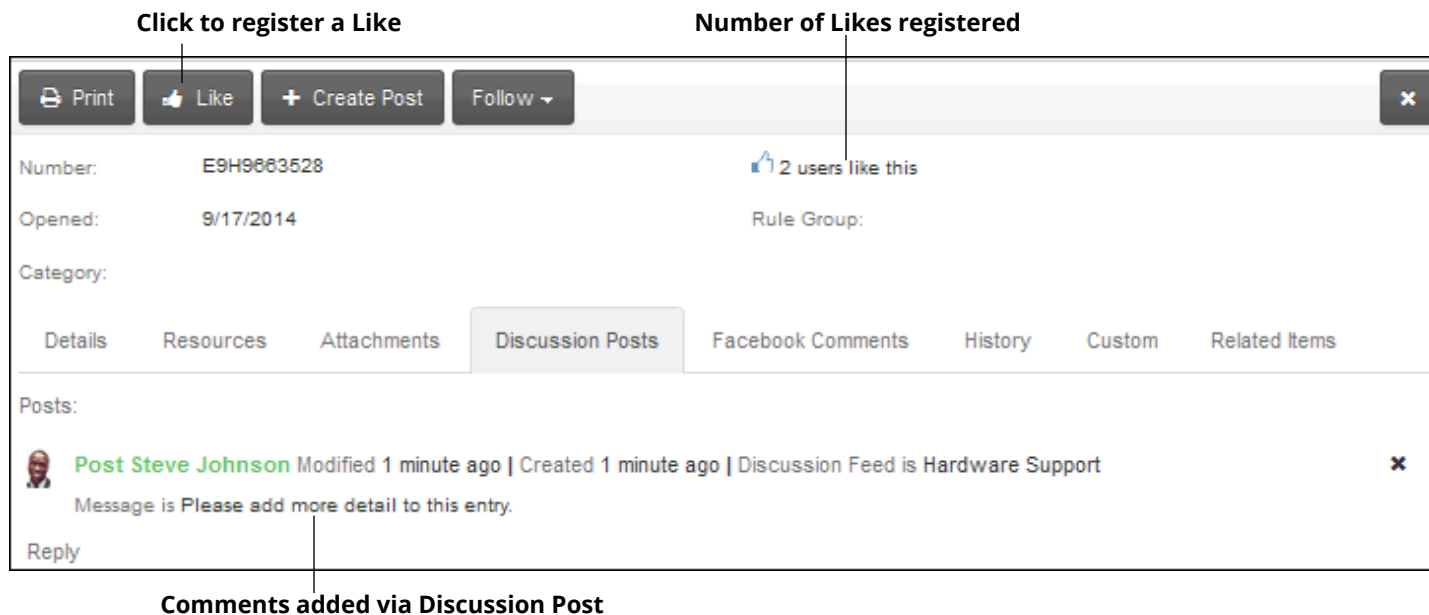
If the customer does not post to Facebook, the comment will be added as follows:

The screenshot shows the 'Facebook Comments' tab with a comment posted by 'Lisa K'. The comment text is 'Please add more detail to this entry.' Below the comment, there are links for 'Reply', 'Like', 'Unfollow Post', and a timestamp '2 seconds ago'. The 'Post to Facebook' checkbox is still checked, and the 'Comment' button is visible.

If the customer is not logged into Facebook, the Comment Using dropdown could be used to log into Facebook via Facebook, Yahoo, AOL, or Hotmail.



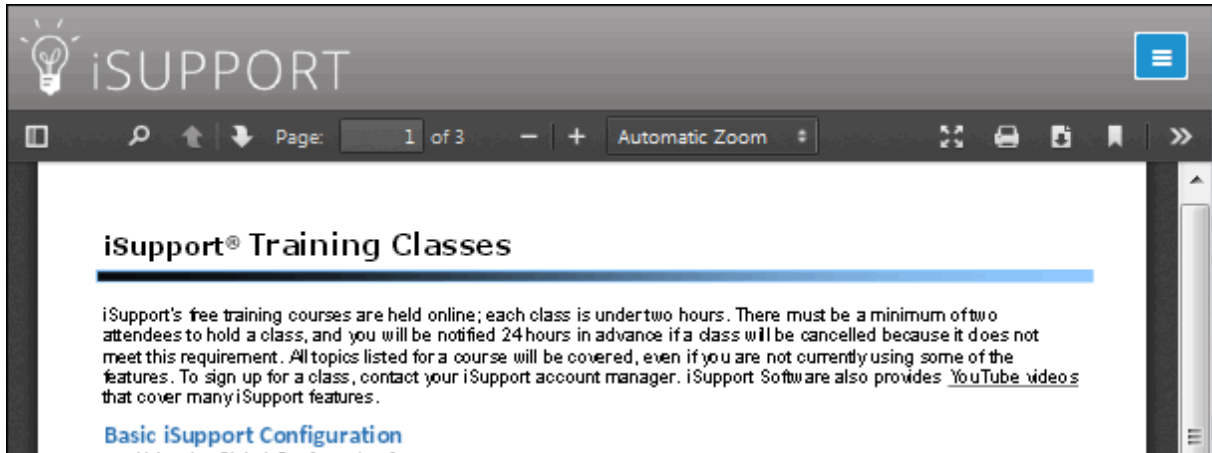
If the Facebook Comments tab is **not** configured to appear in the Knowledge Entry screen, customers can use the Create Discussion Post button to enter comments. Authentication is required in order to post a comment, and discussion posts aren't included in history. If the Discussion Post tab is configured to appear in knowledge entries, these discussion posts will appear on the Discussion Posts tab in the knowledge entry.



Authenticated customers can also give feedback by clicking the Like button (if configured). The number of likes can be configured to appear in the Knowledge Entry screen as well as in news feeds. After a like, the Unlike button will replace the Like button in the knowledge entry.

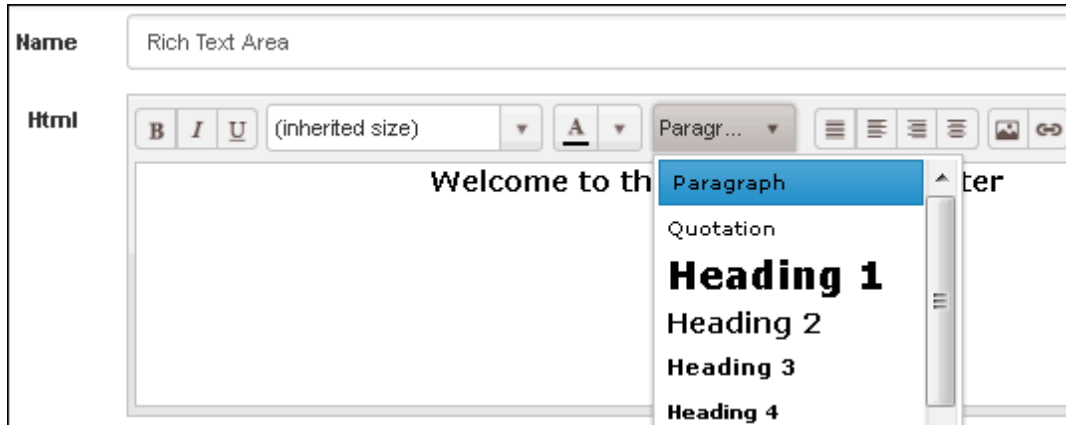
## Link to PDF

This feature displays a specified PDF in the PDF viewer associated with the customer's browser.



## Rich Text Area

This feature enables entry of formatted text, images, and links in a component.



## Self Help Guide

Self help guides contain decision tree style prompts to lead a user to a template, FAQ, knowledge, or help topic. Customers simply select items until the result appears. These guides can be accessed by clicking the link (labeled I Need Help by default) in the search bar; a navigator link to one self help guide or all self help guides can be used.

The image shows a sequence of three screenshots illustrating the steps to create a self-help guide entry.

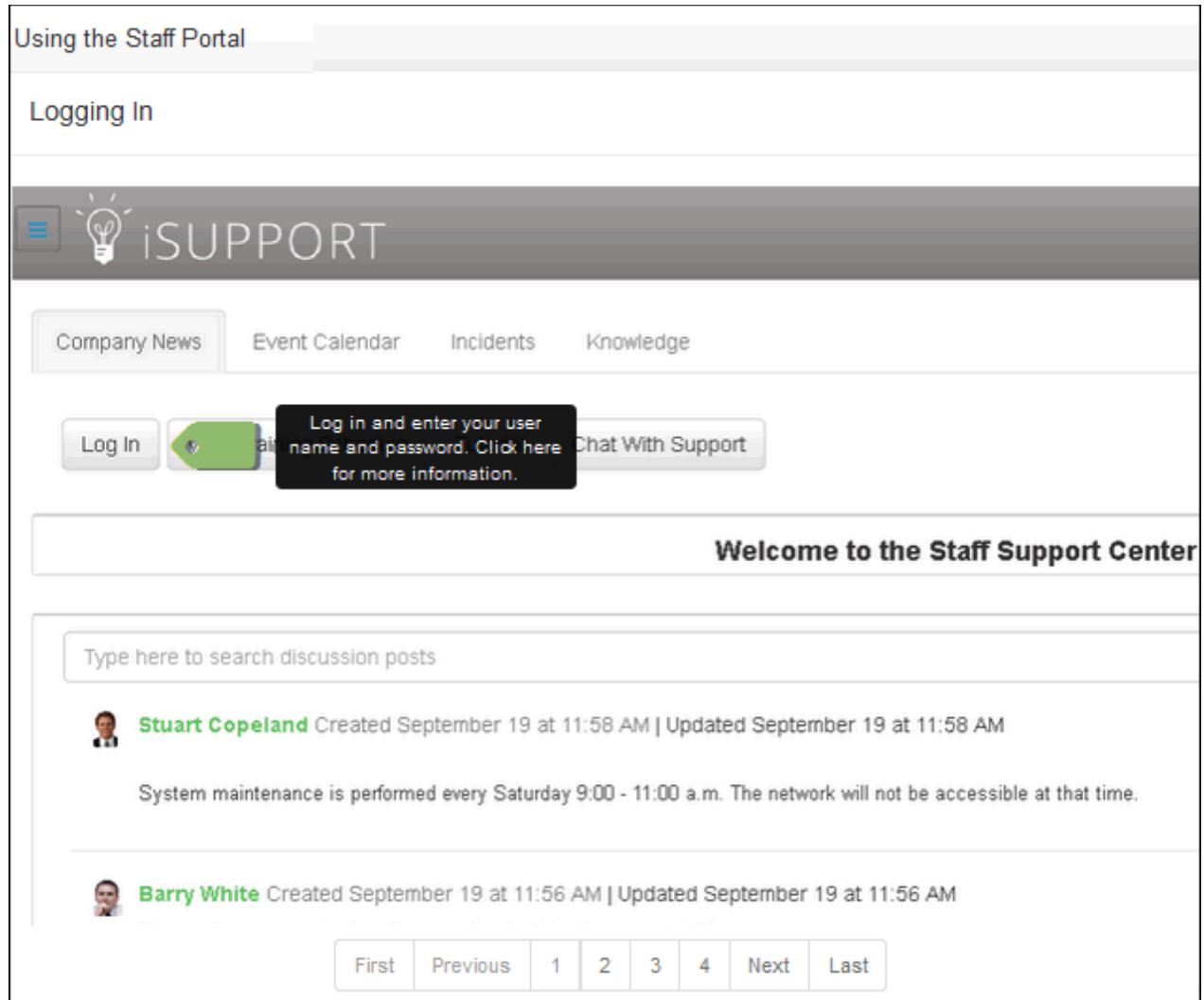
**Step 1:** The first screenshot shows a "Self Help Guide" window. It contains the text "Please make a selection below." and a link labeled "Hardware/Software". Below this link are two options: "Hardware" and "Software".

**Step 2:** The second screenshot shows the "Hardware/Software" window. The "Hardware" option is selected, and the window displays the text "Be sure that you..." and a link labeled "I need a new phone.".

**Step 3:** The third screenshot shows the "I need a new phone." window. It contains a "Save" button, a "Related Items:" section, and a "Description:" section. The "Related Items:" section includes fields for "Impact:" (set to "Individual User"), "Urgency:" (set to "Minor"), and "Sched. Imp.:" (set to "5/12/2016"). The "Description:" section includes a text area with bold, italic, and underline formatting options, and a field labeled "Order Phone".


## Tutorials

Use tutorials to provide information to support representatives and customers. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content. You can associate a tutorial with a navigator link or a button, a dashboard, or mySupport work item submit or display layout.



You can display images, videos, links, and formatted text in the screen that appears when a user clicks a tag.

Using the Staff Portal

Log in and enter your user name and password. [Click here for more information.](#) 

The Login dialog is shown below. The Password field is case sensitive.

Username

Password

☐ Remember Me

or [Register](#)

[Forgot your password?](#)


Select **Remember Me** to place a cookie on your system.


The **Register** option enables a customer to enter contact and login information; a Customer Profile record will be created after completion. A customer will not be able to register with the same email address and login name as another customer.

The **Forgot Password** link in the Login dialog enables you to enter an email address to which an email will be sent with a login and a link for resetting their password. Note that you won't be able to change their password if the source of your Customer Profile record is Active Directory, LDAP, or a relational database that is being synchronized with a mapped password.


## Twitter Monitor

The Twitter Monitor component searches Twitter and displays tweets that include a specified search term, or it can display tweets for a specified Twitter account, for the last 90 days.

 Twitter Monitor



Beta two is now live and customers/prospects can check out mySupport v14 at <http://t.co/M5MYiDL1XL>.  
#RaisingTheBar #ItIsWhatWeDo  
@iSupportTech September 12 at 5:31 PM



Internal upgrade to v14 beta 1 is underway. The future of mySupport is about to become reality! #helpdesksoftware  
<http://t.co/cySfXbddl0>  
@iSupportTech August 29 at 2:38 PM

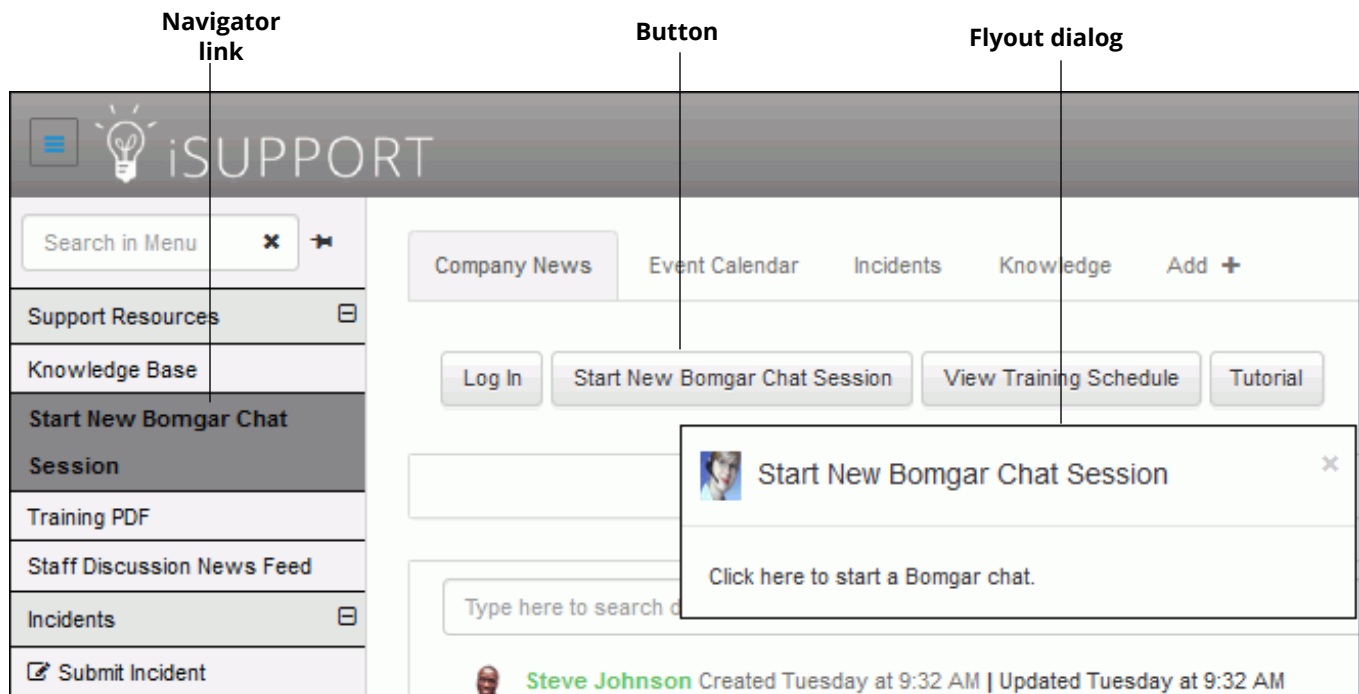
# Communication Features

## Chat

Customers can chat on mySupport portals via iSupport's built-in chat feature, Bomgar, and Citrix GoToAssist Remote Support.

### Bomgar Chat

iSupport integrates with Bomgar Software for remote desktop connection and chatting. (Note: Bomgar is a third party application; Bomgar software and licenses must be purchased through Bomgar.) You can configure access via a navigator link, component button, and/or a flyout dialog on a mySupport portal.



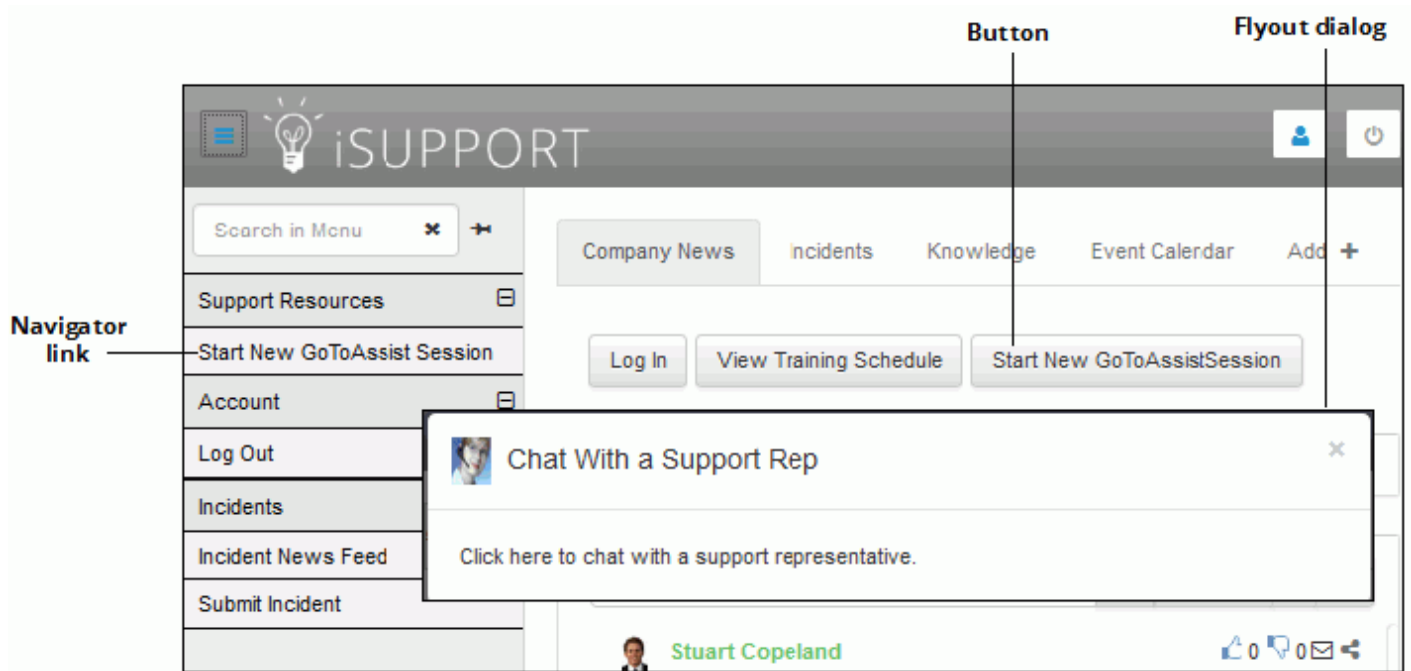
You can configure automatic creation of an incident when a new chat session starts, require customers to log in when using chat, and enable customers to start a chat from the New Chat Session link on a saved incident if support representatives are signed in to Bomgar.

When a customer starts a session, you can include the names of the support representatives logged into the Bomgar Representative Console and if a name is selected, the Chat icon on the Personal tab will flash to the representative on his/her Bomgar Representative Console. You can also include "General Queue" which will cause the Chat icon on the General Queue tab to flash to all support representatives logged in to the Bomgar Representative Console.

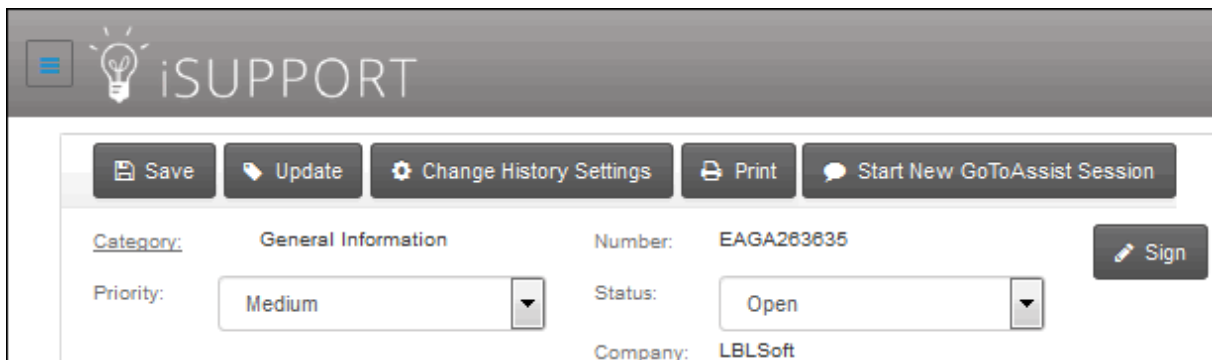
The 'Start New Chat Session' dialog box contains a text input field for the 'Conversation Topic' with the placeholder text 'Unable to print'. Below this is a dropdown menu for 'Available Reps' with 'General Queue' selected. The dropdown list shows 'General Queue', 'Jeff B', 'J Hernandez', and 'JoEllen H'. A 'Start Chat' button is located at the bottom left of the dialog.

## Citrix GoToAssist

iSupport integrates with Citrix GoToAssist Remote Support, enabling customers to access the Citrix® GoToAssistPortal. (Note that this functionality does not automatically capture chats or add recorded sessions.) You can include GoToAssist on mySupport via a component button, a flyout dialog, and/or navigator link.



- You can also include a button in the Display Incident screen.

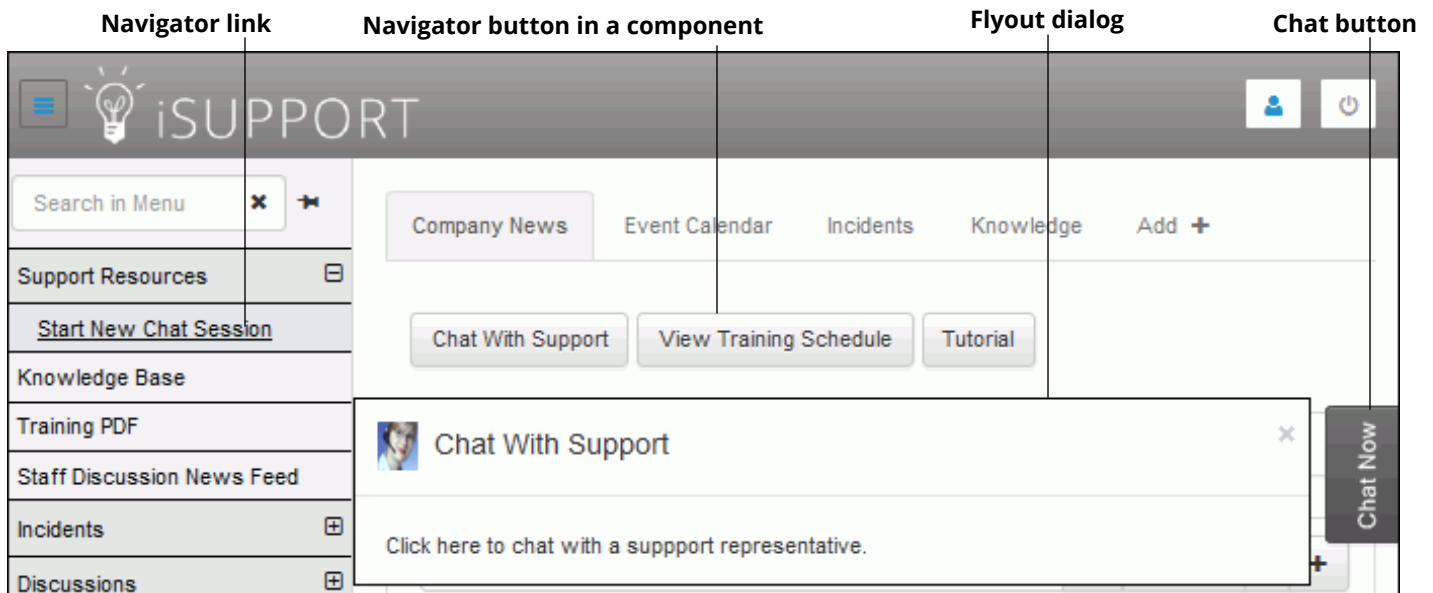


## mySupport Chat

iSupport includes a built-in chat feature that enables you to configure chat responses, display chat to customers that are not authenticated, set up support representative availability, and automatically create incidents with chats in incident history.



You can include mySupport chat via a navigator link, component button, a flyout dialog, and/or button that you can position on the screen.



You can also include a button in the Display Incident screen.

The screenshot shows the 'Display Incident' screen with the following details:

- Buttons:** Save, Update, Change History Settings, Print, and Chat with Support Rep.
- Category:** Unlisted/Other
- Number:** E13B3466AA
- Priority:** Medium
- Status:** Open
- Company:** LBLSoft
- Customer:** Steve Johnson
- Sign button:** A button labeled 'Sign' with a pencil icon.

If chat is configured for users that are not authenticated, a dialog will appear for the user to enter their name, email address, and question; otherwise, a dialog will appear for the user to enter a question. The Group field will appear if

multiple groups are scheduled as available in the Support Representative Groups screen. If no one is available, the button text will change to “Chat Not Available” and the chat dialog will not appear.

#### Customer not authenticated

The screenshot shows the iSUPPORT chat interface for a customer not authenticated. The header bar is dark grey with a lightbulb icon and the text 'iSUPPORT'. Below the header, a message reads: 'To help us serve you better, please provide some information before we begin your chat.' The form contains the following fields: 'First Name' with the value 'Steve', 'Last Name' with the value 'Johnson', 'Email Address' with the value 'sj@example.local', and a 'Question' text area with the text 'My system is running slowly and I need to get my reports out.' Below the question is a 'Group' dropdown menu with 'Quality Control' selected. Each input field has a red exclamation mark icon to its right. At the bottom of the form is a 'Start Chat' button.

#### Customer authenticated

The screenshot shows the iSUPPORT chat interface for a customer authenticated. The header bar is dark grey with a lightbulb icon and the text 'iSUPPORT'. Below the header, a message reads: 'To help us serve you better, please provide some information before we begin your chat.' The form contains the following fields: a 'Question' text area with the text 'My system is running slowly and I need to get my reports out.', and a 'Group' dropdown menu with 'Select a group' as the placeholder text. Each input field has a red exclamation mark icon to its right. At the bottom of the form is a 'Start Chat' button.

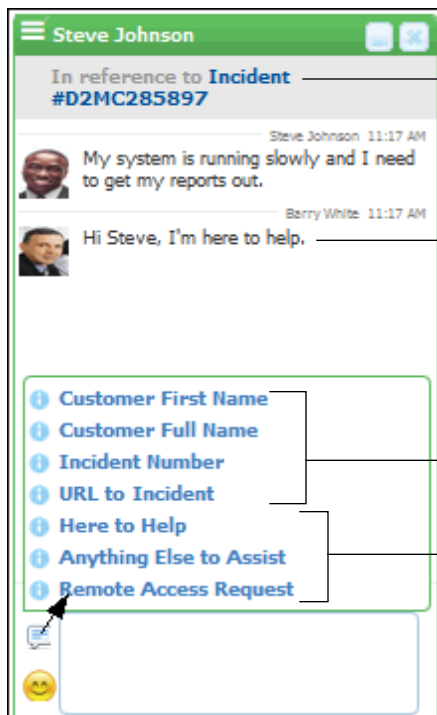
The question will appear to available support representatives with an Accept Customer Chat Request button.

The screenshot shows a chat dialog for a customer named Steve Johnson. The header bar is green with the name 'Steve Johnson' and a small profile picture icon. Below the header, a message reads: 'My system is running slowly and I need to get my reports out.' Below the message is a large empty text area for the support representative to respond. At the bottom of the dialog is a blue button labeled 'Accept Customer Chat Request'.

Once accepted, an incident will be created 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 emoticon 😊 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.



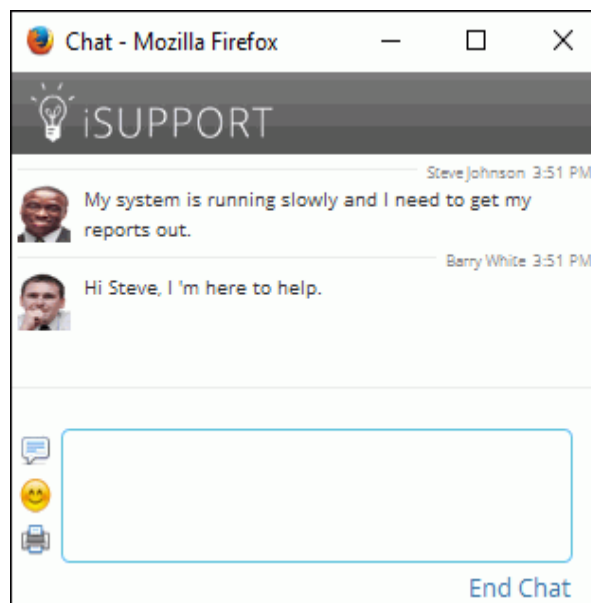
Click to display incident created after chat request is accepted


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

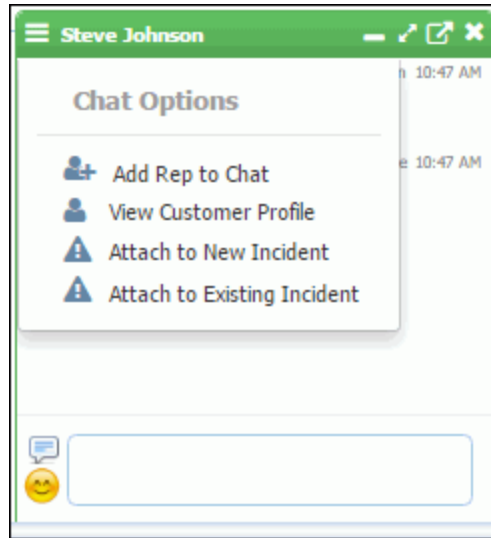
Include fields for adding the first and full name from the customer's profile or initial entry dialog (if not authenticated), as well as the number and URL of the incident created when the chat is accepted

Chat responses configured in the Chat Responses screen

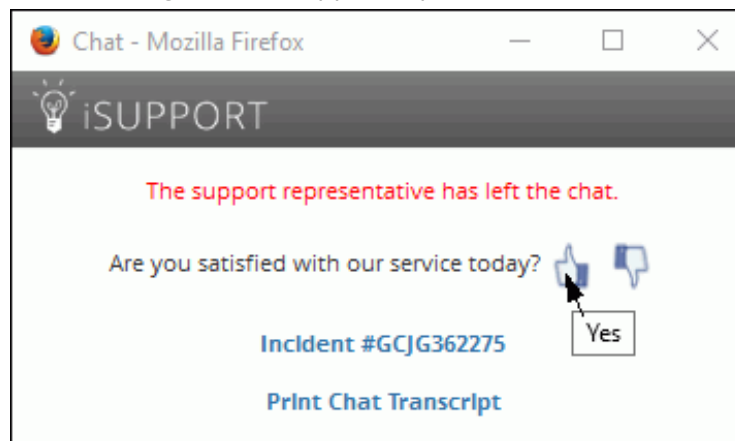
- For customers, a Print Chat Transcript icon. The customer chat window is shown below.



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 indicating that the support representative ended the chat is also configurable.



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



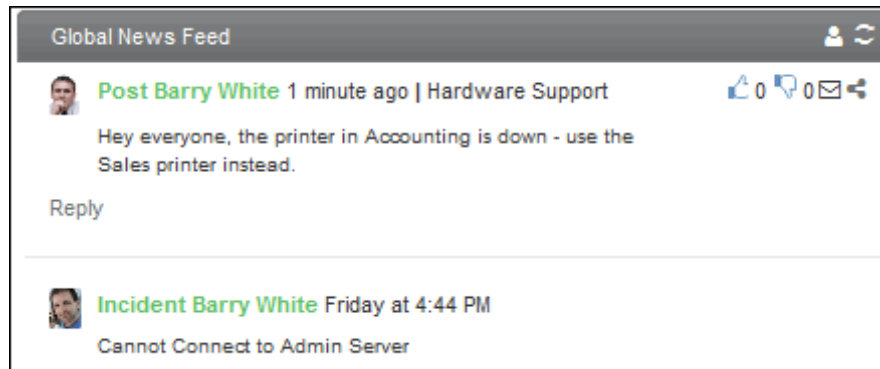
## Discussion Feeds

Customers can create, view, reply to, and share discussion posts on shared discussion-only news feeds that are created by support representatives via the News Feed component on the Desktop.

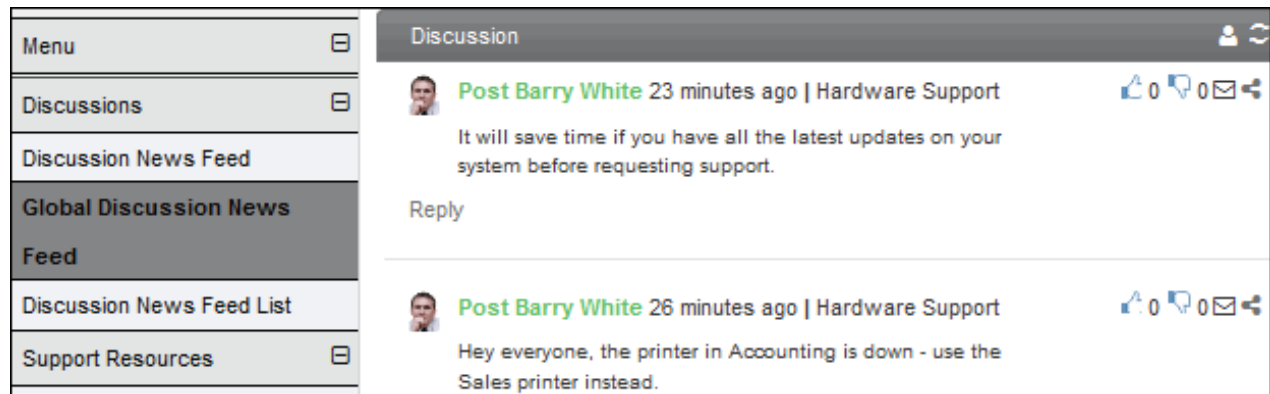
## Viewing and Sharing Discussion Posts

Discussion posts can be included on a mySupport portal in several ways:

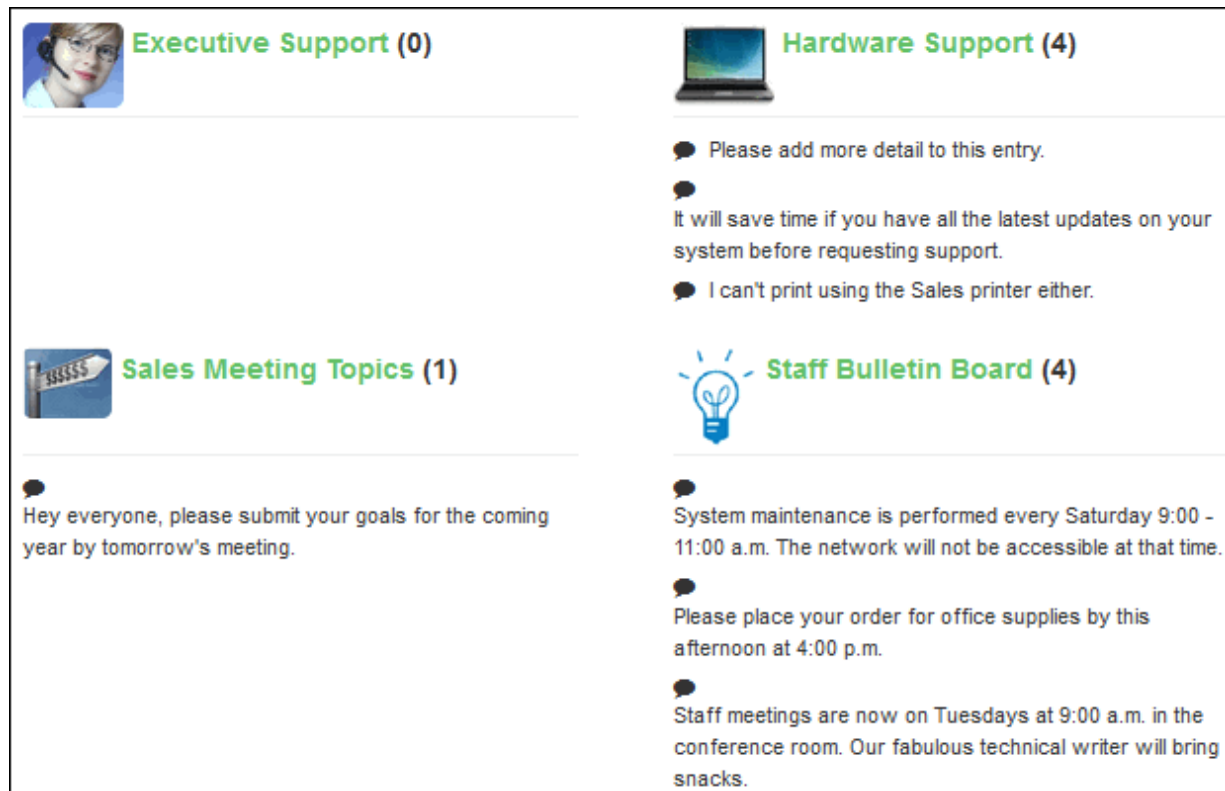
- All discussion posts can be included along with other work items via a configured Discussion News Feed link on the mySupport navigator or a Feed component added using the Designer.



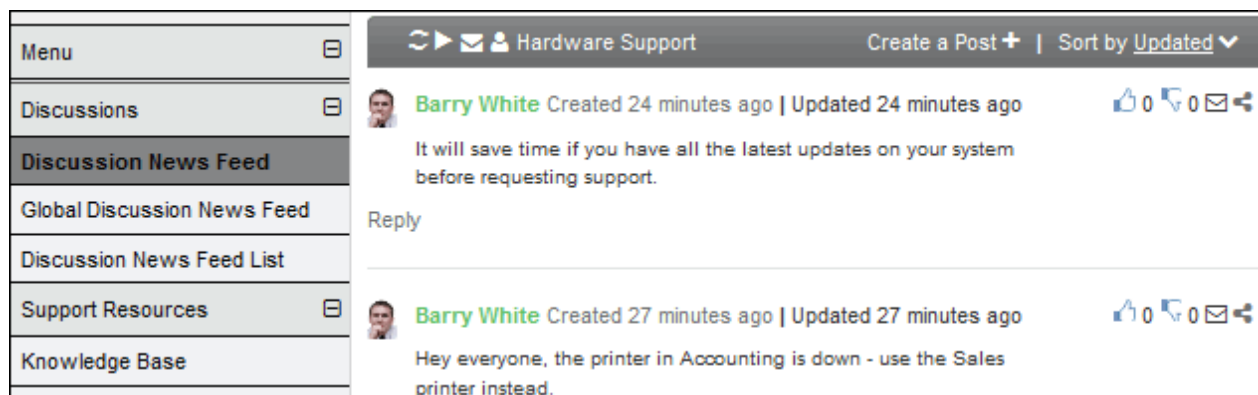
- All discussion posts can be included in one feed via a configured Global Discussion News Feed link on the navigator.



- A **list of all discussion-only news feeds** can be displayed from a configured Discussion News Feed List link on the navigator.

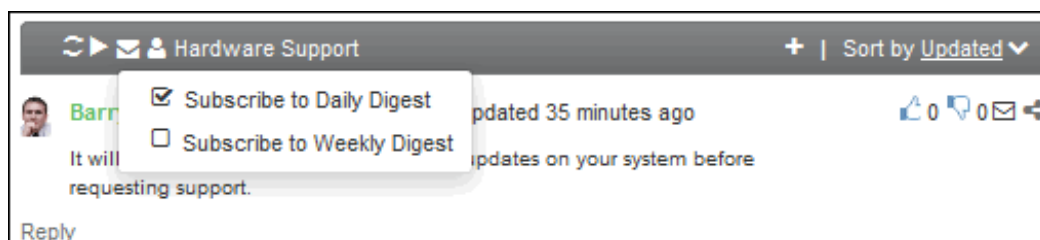


- A **specific discussion news feed** can be displayed from a configured Discussion News Feed link on the mySupport navigator or in a Feed component added via the Designer.




## Available Options for Discussion Feeds



- The **discussion digest** icon to subscribe to an email regarding news feed activity that can be sent daily or weekly.

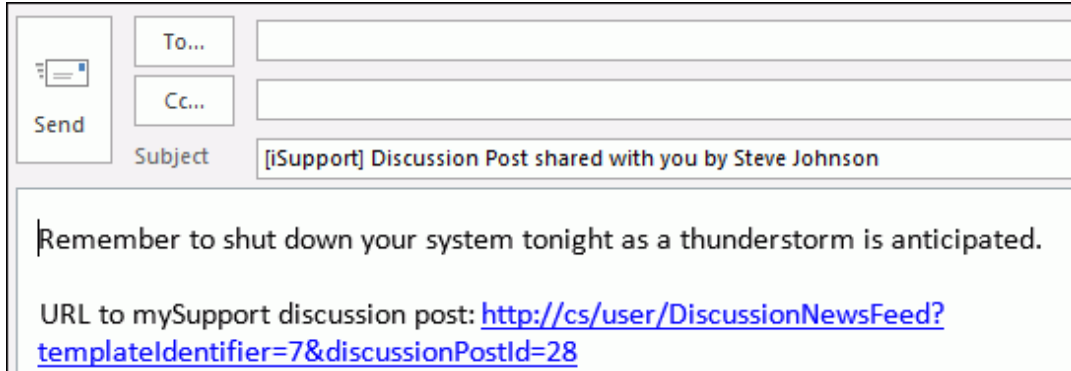


- The Auto Refresh On icon and Off icon starts and stops automatic refresh of the news feed (but replies and your posts will still appear). The pause will be released when a customer manually refreshes the component, creates a post, or when the page is reloaded.

- The View My Posts Only  icon on global news feed and on specific discussion feed restricts the posts in the feed to only those created by the customer.

### Available Options for Discussion Posts

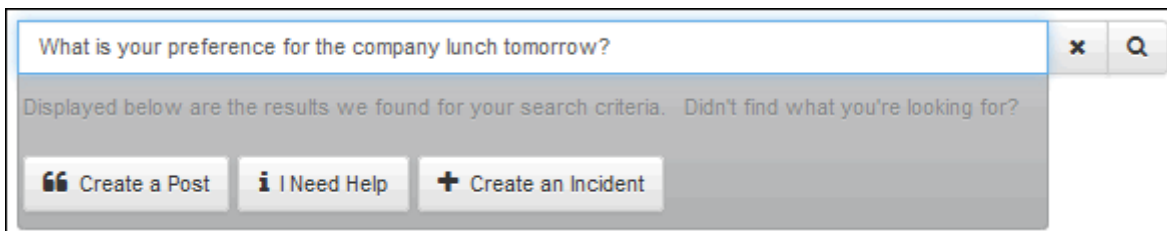
- The **Follow This Post**  icon enables an email notification to be sent when someone replies to the post. Notification content is created via the Discussion Post /Default tab in the Configuration | Email | Custom Notifications screen; it is selected for the discussion feed via the Customer Follow Notification field in the Discussion Posts section of the configuration dialog for the news feed on the Desktop.
- If Allow Customer Share is configured for a news feed (via the configuration dialog for the news feed on the Desktop), the **Share This Post**  icon enables a customer to email the post. The customer's mail client will appear with the content of the post and a link to the post as shown in the example below:



The screenshot shows an email client window. On the left is a 'Send' button with an envelope icon. To the right are fields for 'To...', 'Cc...', and 'Subject'. The 'Subject' field contains the text '[iSupport] Discussion Post shared with you by Steve Johnson'. The main body of the email contains the text: 'Remember to shut down your system tonight as a thunderstorm is anticipated.' followed by a URL: 'URL to mySupport discussion post: <http://cs/user/DiscussionNewsFeed?templateIdentifier=7&discussionPostId=28>'.

### Creating and Editing Discussion Posts

If configured, authenticated customers can access the Create a Post link on a feed, on an individual knowledge entry, or under the Global Search field after text is entered (shown below).



The screenshot shows a search interface. At the top is a search bar containing the text 'What is your preference for the company lunch tomorrow?'. To the right of the search bar are 'x' and 'Q' icons. Below the search bar, a message reads: 'Displayed below are the results we found for your search criteria. Didn't find what you're looking for?'. At the bottom of the interface are three buttons: 'Create a Post' (with a speech bubble icon), 'I Need Help' (with a person icon), and 'Create an Incident' (with a plus icon).

While creating a post, customers can format the post, select an image to include, create a poll-type post with radio button response options (in discussion-only news feeds).

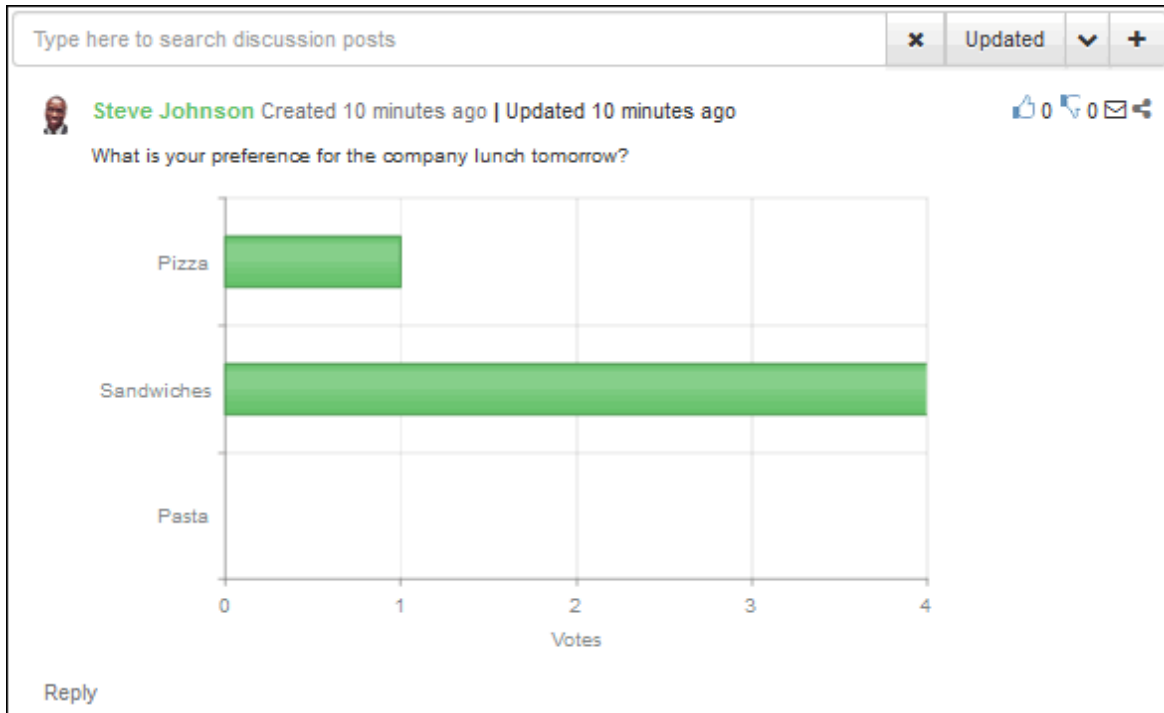
The 'Create a Post' form includes a 'Feed' dropdown menu set to 'Staff Bulletin Board'. The 'Message' section features bold (B), italic (I), and underline (U) formatting buttons, followed by a text input field containing the question 'What is your preference for the company lunch tomorrow?'. Below the message field, a note states: 'To choose an image to attach to this discussion post, drag and drop an image or click Select Image'. This is followed by a 'Select Image' button and a dashed box with the text 'Drop image here to upload'. At the bottom, there are 'Poll' and 'Follow' sections, each with 'Yes' and 'No' radio button options. The 'Answers' section contains a text input field with the text 'Pizza, Sandwiches, Pasta'.

The poll post will appear with radio button response options as shown below. Poll posts will display only to authenticated users.

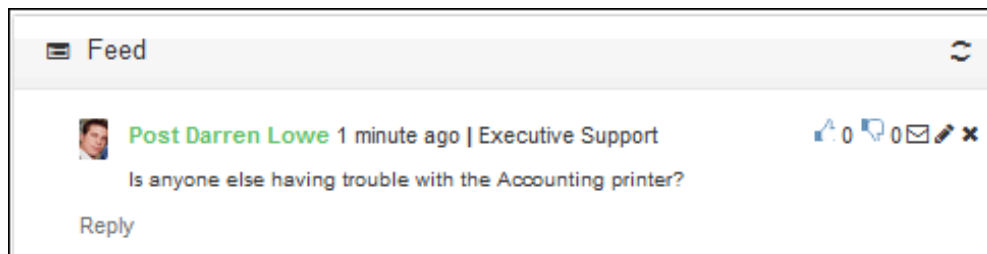
The screenshot shows a news feed entry for a poll post by 'Steve Johnson' posted '3 minutes ago' on the 'Staff Bulletin Board'. The post content is 'What is your preference for the company lunch tomorrow?'. Below the question are three radio button options: 'Pizza', 'Sandwiches', and 'Pasta'. A 'Vote' button is positioned below the options. At the bottom of the post, there is a 'Reply' link. The feed header includes a 'Feed' tab and a refresh icon. To the right of the post, there are icons for liking, commenting, and sharing, each with a count of 0.



After the user selects a response, the results will appear in a graph:



After a customer creates a discussion post, an Edit  icon will appear to the customer for 15 minutes.



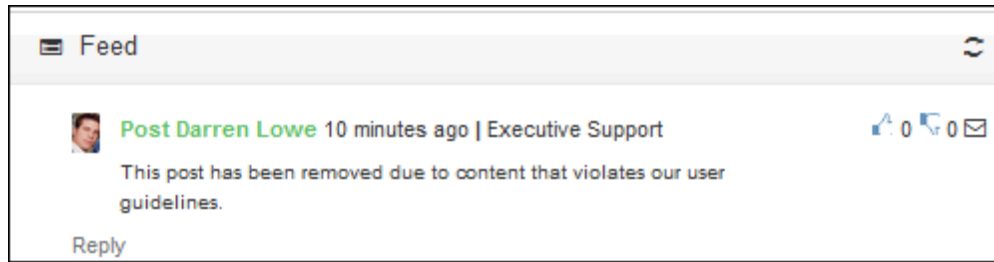
The Follow option in the Create a Discussion Post dialog enables an email notification to be sent when someone replies to the post. A user's first discussion post or reply will determine the default for the Follow option in the Create Discussion Post dialog this default can be changed in Account Settings.

### Removing and Deleting Discussion Posts

Discussion posts and replies can be removed or deleted in the following ways:

- A customer can remove a post that he/she created if there is no reply. This will delete the post entirely. A support representative that does not have Discussion Feed Administrator access enabled in his/her Support Rep Profile record will not be able to delete his/her own post.
- A support representative with Discussion Feed Administrator access can delete a post in a news feed if the Allow Post Deletion option is set when the feed is configured. This will delete the post entirely.
- A support representative with Discussion Feed Administrator access can remove a post in a news feed if the Allow Post Removal option is set when the feed is configured. This will hide a 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.



- An administrator can remove or delete a post. 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.