



iSUPPORT

Incident Management Edition

iSupport - Overview

iSupport helps you to perform functions such as creating and managing incidents, entering and searching for knowledge entries and FAQs, tracking assets, customers, and companies, sending surveys, and generating reports.

iSupport averages two major releases a year, and iSupport's v15 release focuses on features requested and voted on by iSupport's customer base in a feature request forum. The release includes a simplified configuration interface; adjustable for any device and screen size, it's now easy to implement customization, integration, and automation features gradually according to company workflows.

In addition to many user experience and performance enhancements, the release also includes:

- Enhanced Survey functionality with followup features and rules with logic and branching
- A Desktop Notification Center that enables faster response times and prevents notifications from slipping through the cracks

The screenshot displays the iSupport Desktop interface. At the top, there is a navigation bar with a lightbulb icon, a notification for "Health Insurance Forms Due On Friday", a user profile for "Barry (In)", and several utility icons (notifications, calendar, chat, search, settings, help). Below this is a secondary navigation bar with "Reports" and "My Work Items" tabs. The main content area is titled "View" and shows a list of incidents grouped by date created. The selected group is "5/14/2016 (2)". To the right of the list is a table with columns for Status, Priority, Assignee, Customer, and Description. The table shows two rows: one for an "Open" incident with "High" priority assigned to "Copeland, Stuart" for "Apple, Christine" with a description of "Slow performance o...", and another for a "Closed" incident with "Emergency" priority assigned to "Copeland, Stuart" for "Garrity, Alison" with a description of "Error when accessing...". A "Chat (2)" button is visible in the bottom right corner.

Status	Priority	Assignee	Customer	Description
Open	High	Copeland, Stuart	Apple, Christine	Slow performance o...
Closed	Emergency	Copeland, Stuart	Garrity, Alison	Error when accessing...

iSupport's configurable Desktop for support representatives and administrators

Incident Management

Help desks are the main contact point for communications to the IT department. This front line is responsible for restoring services to a normal status in the quickest and most thorough manner possible. Providing the service desk with a tool to track and automate this first contact is critical; by properly recording the information, the status is clear to anyone during the life of the issue.

iSupport's Incident Management functionality can assist in issue tracking and accomplishing quick restoration of service with the following:

- Incident creation from email, direct entry, scheduling, Mobile Client, and self-help mySupport portal
- Custom fields
- Related incidents and assets
- Categories
- Scripts
- Scheduling

- Auto-fill, auto-close, and hierarchical templates
- Approval cycles (graphical, ad hoc)
- Routing based on location, skill, name, and group
- Configurable status fields
- Escalation
- Service contracts
- Knowledge base access
- Approval, audit, correspondence, customer, rule group, and work histories
- Global search with Google integration
- Fully configurable threshold alerts and notifications
- Configurable display on mySupport user portals
- Integration with Bomgar™ Remote Support Software, Citrix® GoToAssist®, Microsoft® Office Outlook® Calendar, Microsoft® Lync®, and Google Calendar™
- Awareness and chat for support representatives viewing the same work item
- Field and tab layout designer
- Feedback surveys

The screenshot displays the iSupport Incident Management interface. At the top, there is a navigation bar with 'Incident', 'New', 'View', and 'View Tour' options. Below this is a toolbar with icons for 'Save', 'Save And Close', 'Print', 'Delete', 'Font Size', 'Counters', 'Add History', 'Add Asset', 'Categorize', 'Override Data', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Ad Hoc Approval'. The main content area is divided into several sections:

- Customer:** Steve Johnson, LBLSoft, Inc., Headquarters, Administration, 360-397-1004, sj@example.com, 8675309. Ticket counts: 11 Open, 1 Suspended, 0 Closed, 1 Reopened.
- Incident Details:** Status: Open, Priority: Low, Number: D7NG381162, Assignee: Barry White, Created Date: 12/18/2013 9:45:47 AM, Author: Barry White, Modified Date: 12/18/2013 9:48:47 AM, Closed Date: (empty), Category: Administration, Existing Employee, Workstation, Other, Rule Group: Incident Default, Related Hierarchy: (empty).
- Navigation:** Details, History, Custom Fields, Others to Notify, Assets, Cls, Associated Work Items, Attachments.
- Short Description:** Workstation performance
- Description:** Slow performance on workstation.
- Resolution:** (empty text area)

iSupport's configurable Incident screen

Service Level Management

No amount of issue tracking will provide great customer service if there is no accountability. By having an agreed upon level of service, expectations are set, metrics are measurable, and alerts can be enabled to help meet service goals. Anyone can have good customer service; the defining difference is to provide great customer service. Clear, consistent, automated, and timely communication with everyone involved will assist you in achieving that difference.

Use iSupport's powerful Rule functionality to configure notifications, priority or reassignment escalation, approvals, status changes, and more to occur when specified conditions and time frames are met.

Rule groups are applied to incidents through customers, companies, category combinations, and incident and hierarchy templates. When a work item is saved, conditions will be evaluated and actions will be performed if a rule's conditions are met. This functionality can be used to:

- Change field values as well as an email server account and template
- Send notifications
- Route via round robin or load balancing
- Initiate an approval cycle
- Initiate a webhook for posting to a web application

Notifications can include work item details and a link to the work item, and you can customize notification text.

The screenshot displays the 'Rule Groups' configuration interface. At the top, there are two tabs: 'Basics' and 'Rule Groups'. The 'Name' field is set to 'Emergency Priority Notification'. Below this is the 'Configure Conditions' section, where 'Rule type Is' is set to 'Time-Based' and 'Hours of Operation' is set to 'Default Hours of Operation'. A 'Match' dropdown is set to 'All' of the following conditions: 'Priority Is Emergency'. The 'Configure Time Frame Intervals and Actions' section shows an interval of '1' at '8.00' in 'Hours'. The actions are configured to 'Notify Assignee (via email) With Default Notification Emergency Priority Warning - Rep'.

iSupport's Rule configuration screen

Workflow Management

Although support centers are similar at their core function, every organization has some level of uniqueness in its practice and methodologies. Workflow management empowers a company to achieve an improved level of efficiency with better process control, greater accountability, advanced automation and streamlined customer service.

iSupport uses a robust workflow template function to allow users to track related issues and requests. These workflow templates often contain dependencies, or parent/child relationships. They can be as simple or complex as your needs dictate.

- Coordinate support activities that involve many steps, people, and departments
- Prebuild and re-use templates to standardize repetitive projects
- Create and use new workflows at any time
- Implement dependent and parallel tasks to optimize the timing of each step and effort

The screenshot displays the iSupport Incident screen for a customer named Steve Johnson. The interface includes a top navigation bar with 'Incident', 'New', 'View', and 'Custom' options. Below this is a toolbar with various actions like 'Save', 'Print', 'Delete', 'Font Size', 'Counters', 'Add History', 'Override Data', 'Templates', 'Ad Hoc Approval', 'Add Asset', 'Route', 'Hierarchy', 'Sign', 'Categorize', 'Customer', 'View Related', 'Previous', and 'Next'.

The main content area is divided into several sections:

- Customer Profile:** Steve Johnson, LBLSoft, Inc., Headquarters Administration, 360-397-1004, sj@example.com, 8675309. Ticket counts: 14 Open, 1 Suspended, 0 Closed, 1 Reopened.
- Incident Details:** Status: Open, Priority: Low, Number: DCJ132147A, Assignee: Connor Flynn, Category: Hardware, Rule Group: Incident Default, Modified Date: 12/19/2013 12:25:26 AM.
- Workflow Progress:** A horizontal bar chart showing the progress of the workflow. The bar is divided into three segments: In Progress (yellow, approximately 55%), Future (red, approximately 45%), and Finished (green, 0%).
- Task List:** A list of tasks with their status and actions:
 - Cannot Connect to Administration Server - Open (Current) (Yellow circle)
 - Check Direct Connection to Server - Open (Yellow circle)
 - Check Connection to CRM Application (Red circle)
 - Check CRM Application Permissions (Red circle)
 - Check User Account Permissions - Open (Yellow circle)
 - Check Connection to Accounting Application (Red circle)
 - Check Accounting Application Permissions - Open (Yellow circle)

Workflow displayed in iSupport's Incident screen

Asset Management

Making informed decisions about future purchases can greatly assist your organization in running a smooth IT center. Do you purchase new hardware? Does the cost of upgrading an application outweigh the cost of downtime when the older version fails?

Any asset or service that is supported by the IT center should be documented and its history tracked. This will assist in answering those important questions that will impact the future of the service desk. iSupport's Asset functionality includes the following for tracking assets and services:

- Descriptive fields such as model, location, manufacturer, etc.
- Custom fields
- Asset owners

- Groups and types for establishing asset relationships and access
- Dynamic and scheduled scanning with baselines and comparisons
- Device monitoring
- Attached files
- Audit history
- Software license tracking
- Unit count tracking
- Asset bar code printing
- Predefined and customized views and reports
- WMI and SNMP scanning methods
- Field and tab layout designer

This functionality is integrated with iSupport's incident features for status visibility between all affected departments.

The screenshot displays the iSupport Asset Management interface. The top section shows a menu bar with 'Asset', 'New', and 'View'. Below it is a toolbar with icons for 'Save', 'Save and Close', 'Print', 'Print Label', 'Delete', 'Font Size', and 'Counters'. The main area is divided into two sections: 'File' and 'Display'. The 'File' section contains fields for 'Type' (IBM Thinkpad), 'Name' (SJ Laptop), 'Manufacturer', 'Model', 'Source', 'Associated Configuration', and 'Comments'. The 'Display' section contains fields for 'Location' (Headquarters), 'Tag Number' (C0293), and 'Owners' (Johns). A 'Health Insurance Forms Due On Friday' notification is visible in the top right corner. The 'Asset Monitor' window is open, showing a list of monitored devices: 'csd', 'SQL Server (MSSQL Server)', 'Print Spooler', 'Smart Card', 'Uptime', 'c', 'iSupport Agent Manager', 'CPU', and 'Memory'. The 'Memory' device is selected, and a tooltip displays its status: 'Percent Uptime: 79.1921', 'Last Update: 3/11/2014 2:09:45 PM', and 'Last Reported Value: 69% utilization'. A 'Show Details' link is also present.

iSupport's configurable Asset screen and Desktop Asset Monitor

Knowledge Management

Integration of a knowledge management process into your service activities will enable you to identify, create, and distribute knowledge throughout your organization thus creating improved performance, competitive advantage, innovation, and the general development of collaborative practices.

iSupport's Knowledge Management functionality includes the following for the transfer of knowledge throughout your help desk. You can:

- Capture knowledge from resolved incidents
- Implement an approval workflow to ensure accurate and complete knowledge entries
- Send review notifications
- Make expert knowledge available to front line support staff
- Allow end users to search for solutions
- Configure custom fields and status labels
- Enable users to provide feedback via a simple "like" as well as comments to Facebook and discussion feeds
- Integrate knowledge entries into the incident process to help reduce incident count
- Access and integrate optional standardized PC support content by subscription

The screenshot displays the iSupport Knowledge Management interface. At the top, there is a blue header with the text "Selection New Knowledge". Below this is a toolbar with icons for "Save", "Save and Close", "Print", "Delete", "Font Size", and "Counters". The main content area is divided into two sections: "File" and "Display".

The "File" section contains the following fields:

Number	DBFA4754A7	Author	Barry White	Category	Hardware
Source	Direct Entry	Created	11/15/2013 9:38:43 AM		Printer
Reviewer	Barry White - Clear	Review Date	<input type="text" value="11/20/2013"/>		HP Laserjet
Status	<input type="text" value="Pending Approval"/>	Reason for Decline	<input type="text"/>	Rule Group	Default Knowledge Rule Group

The "Display" section contains the following information:

mySupport URL: <http://exampleserver/user/KnowledgeBase/View/3>

Below the form, there are tabs for "Details", "Information", "History", "Custom Fields", "Discussion Posts", and "Attachments". The "Description" tab is selected, showing the text: "Maintenance must be performed after 200,000 pages are printed." Below this is the "Error Messages" section, which contains the text: "Maintenance Required". The "Steps" section contains the text: "To clean printer: 1. Remove all dust from interior of printer. 2. Lift the paper access plate and wipe it off."

iSupport's configurable Knowledge Entry screen

Service Contracts

iSupport enables you to create and manage service contracts for your customers. You can track and restrict incidents and changes for customers, companies, and/or assets.

Set up contracts based on work item count (a specified number of incidents and changes), hourly count (a specified number of hours), duration (time frame in days), or both (limiting the number of incidents and changes within a specified daily time frame).

You can benefit from these features by:

- Setting up unique levels of service for different customers
- Establishing customer expectations
- Optimizing planned work levels
- Increasing accuracy in customer billing
- Saving time with service contract templates

Service Contract

Save Save and Close Print Delete Counters New Correspondence Use Template

File Display Actions

Number: A9SJ6A6A64
Name: SJ Work Items
Contract ID: 8675309
Status: Active
Type: Count
Modified: 9/27/2010 7:03:50 PM
Used: 2 / 10.00 Incidents, Changes

Duration Count: 10.00
Duration Count Type: Hours Work Items
Incidents
Changes
Send Expiration Reminder:
Threshold Value: 8 Incidents, Changes

Hours of Operation: External Access
Notification Event: Initial Save
 Author
 Customer or Company's Primary Contact
 Internal Contacts
 External Contacts

Details History Contacts Custom Attachments

Comments:
Contract covers all applications.

Customers: Add Remove

Name	Email	Phone	Company
Steve Johnson	sj@example.com	360-397-1004	LBLSoft, Inc.

Companies: Add Remove

Name	Phone	Primary Contact	Primary Email
LBLSoft, Inc.	360-397-1000	Steve Johnson	sj@example.com

Assets: Add Remove

Name	Serial Number	Tag Number	Type
SJ Laptop	987654-65435-6546	C0293	IBM Thinkpad

iSupport's configurable Service Contract screen

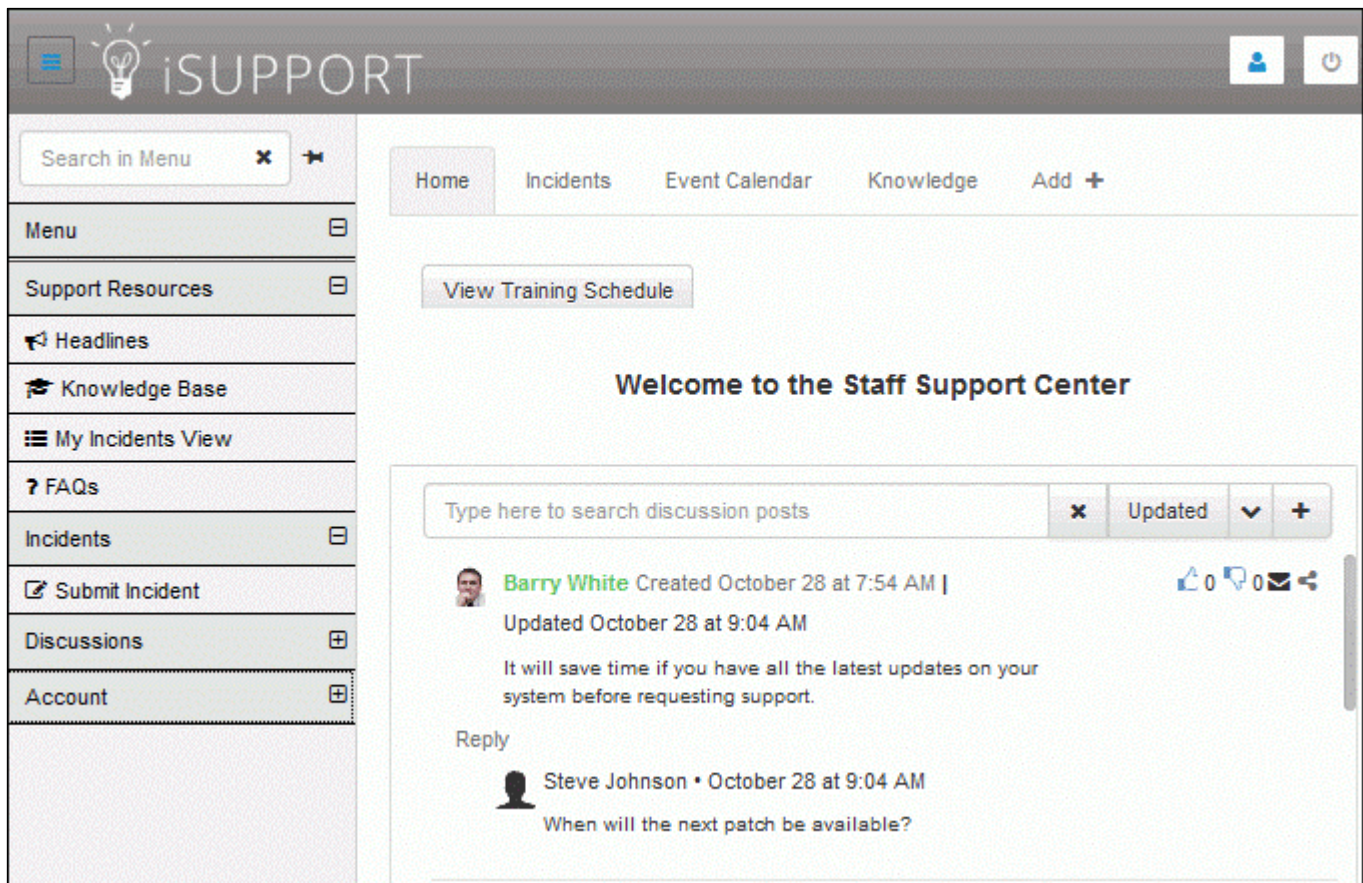
End User Self-Support

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

You can enable customers to add dashboards and components.

Customers can authenticate using several methods, including Facebook and LinkedIn.

Everything is configurable, including the feature links, fields that appear for viewing and submitting records, colors, etc. An unlimited number of interfaces can be configured to target different customer groups.



iSupport's configurable mySupport portal

Reporting

Views and Reports

iSupport includes a number of preformatted views that enable you to quickly see information that meets basic sets of criteria; for example, “All Incidents by Date Created”. You can place more frequently used views into a Favorites list to enable quicker access to common usage views.

View and Report Designers

iSupport’s Standard View and Report View Designers enable you to completely tailor the information you want to see. You can pull data from practically any record in the system, apply filters and sorting selections, and order/display columns to individual requirements.

Ad-Hoc Reports via SQL Reporting Services

Microsoft SQL Server Reporting Services (SSRS) works in conjunction with iSupport’s data models to enable users to create very powerful, highly-filterable reports with little effort. These accurate, timely reports can be created, dispersed, and automated quickly and efficiently. SSRS reports can be set to refresh at the user’s discretion, and provide instant visibility when accessed via the iSupport Desktop.

The image displays two screenshots from the iSupport application. The top screenshot shows a 'View' window titled 'All Incidents by Date Created'. It features a left-hand navigation pane with an 'Export' section containing a list of dates and incident counts: 5/14/2016 (2), 4/20/2016 (5), 4/18/2016 (2), 4/17/2016 (1), and 3/29/2016 (44). The main area shows a table with columns: Status, Priority, Assignee, Customer, and Description. The table contains three rows of incident data.

Status	Priority	Assignee	Customer	Description
Open	High	Copeland, Stuart	Apple, Christine	Slow performance o...
Closed	Emergency	Copeland, Stuart	Garrity, Alison	Error when accessing...

The bottom screenshot shows the 'iSupport SSRS Reports' window. It displays a table of reports with columns: Name, Modified Date, and Description. A 'New Report' button is visible in the top right corner.

Name	Modified Date	Description
Assets	6/27/2014 7:31:47 AM	
Data Sources	6/27/2014 7:31:34 AM	
Incidents	6/27/2014 7:31:45 AM	
Inventory Scan Results	6/27/2014 7:31:47 AM	
Surveys	6/27/2014 7:31:46 AM	
Drillthru Incidents by Date Closed	6/27/2014 7:31:37 AM	
Drillthru Incidents by Date Created	6/27/2014 7:31:37 AM	
Drillthru Incidents by Escalation	6/27/2014 7:31:38 AM	

iSupport's View component and SSRS reports

Mobile Functionality

Technicians need the flexibility to provide support from any location. It has never been easier to empower your technicians to provide support from wherever they are through their handheld device.

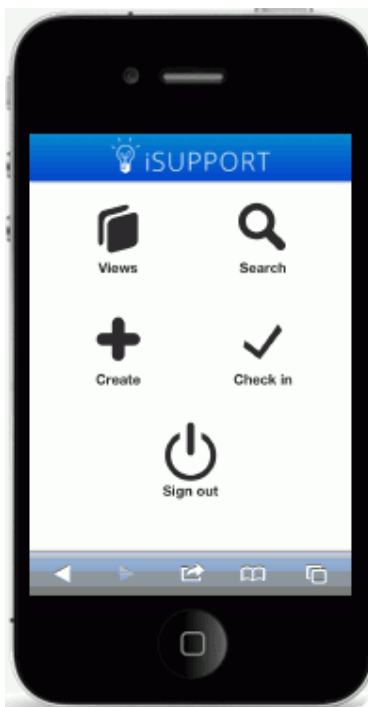
You can access iSupport via a tablet, smart phone (iPhone or Android), or WAP (Wireless Application Protocol) phone for in-the-field updates to iSupport data, inside or outside the firewall, with interfaces optimized for your device.

iSupport's Easy Submit functionality enables customers to use an older version of a device that cannot render HTML5 to submit incidents.

iSupport's mobile functionality includes an HTML5 interface with the following:

- Customizable work item views
- Work item creation and update functionality
- A Check In feature for administrative tracking via a Rep Map component
- Customizable entry screens

Support representatives can use WAP-enabled phones to create, edit, and view Incident, Change, Customer Profile, and Company records using a simple web interface.



iSupport's smart phone and tablet interfaces

