



iSUPPORT

Service Desk Edition

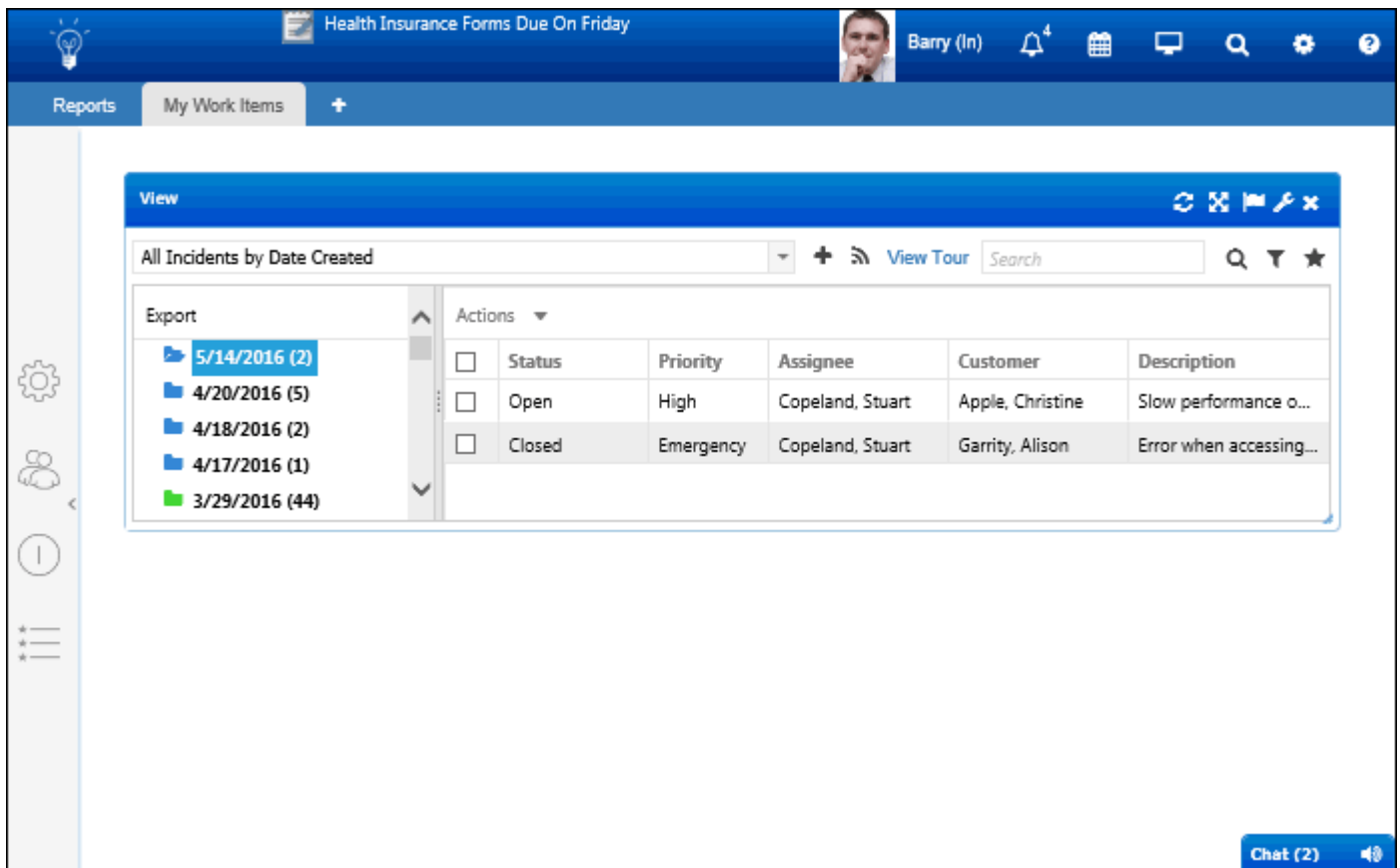
iSupport - Overview

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, monitor, 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 "Export" section lists dates and counts: 5/14/2016 (2), 4/20/2016 (5), 4/18/2016 (2), 4/17/2016 (1), and 3/29/2016 (44). To the right, an "Actions" dropdown menu is open, showing a table of incident details.

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

At the bottom right, there is a "Chat (2)" button with a speaker icon.

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 various icons for actions like Save, Print, Delete, and Add History. The main content area is divided into several sections:

- Customer Profile:** Steve Johnson, LBLSoft, Inc., Headquarters, Administration, 380-397-1004, 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 Tabs:** 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)

Problem Management

Problem Management tracks the process of troubleshooting the underlying issue until a resolution is discovered. Rather than update the work on every affected incident, the incidents are linked to one Problem record and when the problem is resolved, all of the associated incidents are also resolved.

iSupport's Problem Management functionality includes the following for managing problems:

- Problem record creation from the Incident screen, Mobile Client, and iSupport Desktop
- Related assets, incidents, changes - automatic closure of related incidents
- Categories - alerts in Incident screen if open Problem exists with same categorization
- Configurable status levels

- Routing and escalation
- Known error designation and publishing on the iSupport Desktop and mySupport portals
- Audit, correspondence, and work history fields
- Fully configurable threshold alerts and notifications
- Permissions for controlling Problem-related activities
- Predefined and custom views and reports
- Integration with Microsoft® Office Outlook® Calendar and Google Calendar™
- Twitter® publishing
- Awareness and chat for support representatives viewing the same work item
- Field and tab layout designer

The screenshot displays the iSupport Problem Management interface. At the top, there is a blue header with 'Problem' and 'New View' tabs. Below this is a ribbon menu with three groups: 'File' (Save, Save and Close, Print, Delete), 'Display' (Font Size, Counters), and 'Actions' (Add History, Add Asset, Categorize, Route). The main content area is divided into several sections. The top section contains metadata fields: Status (Open), Priority (High), Impact (Department), Urgency (Critical), Number (E3MM4169A3), Assignee (Barry White), Created (3/22/2014 9:30:58 PM), Author (Barry White), Modified, and Publish to mySupport (Yes/No). The middle section has a navigation bar with icons for Details, History, Custom Fields, OTN, Assets, Cls, and Associated Work Items, along with Attachments and Misc. tabs. The bottom section contains text input fields for Short Description (Outlook Access Issue), Description (All departments cannot access email through Outlook.), Workaround, Root Cause (Exchange mailbox store dismounted.), Workaround, and Resolution.

iSupport's configurable Problem screen

Change Management

Change Management ensures that standard methods and procedures are used to handle activities involving services and assets. By adding change management as a tool for the service desk, calls as simple as a request for additional access to those requiring an entire department to be moved can be tracked from start to finish. Frequent requests with similar content can be automated for efficient resolution, and approvals and notifications ensure communication between all involved, as well as an audit trail for any documentation requirements. iSupport's Change Management functionality includes the following for tracking and managing requests related to services and assets:

- Change record creation from Incident screen, Problem screen, iSupport Desktop, Mobile Client, and mySupport portals
- Change types - standard (preauthorized), normal, or emergency

- Templates - can be defined in hierarchies
- Configurable status
- Routing
- Escalation
- Audit, work, correspondence, rule, approval history fields
- Permission functionality for controlling Change-related activities
- Fully configurable threshold alerts and notifications
- Ad hoc and required approvals
- Creation of related Change records in a hierarchy structure
- Predefined views; custom reports can be created using iSupport's SQL reporting feature
- Integration with Microsoft® Office Outlook® Calendar and Google Calendar™
- Awareness and chat for support representatives viewing the same work item
- Field and tab layout designer

The screenshot displays the iSupport Change Management interface. At the top, there is a navigation bar with 'Change', 'New', and 'View' options. Below this is a ribbon menu with categories: File (Save, Save And Close, Print, Delete), Display (Font Size, Counters), Actions (Add History, Add Asset, Categorize, Override Data, Route, Customer, Templates, Hierarchy, View Related, Ad Hoc Approval, Sign), and Navigation (Previous, Next). The main content area is divided into several sections:

- Customer Q:** Profile for Steve Johnson, LBLSoft, Inc., Headquarters, Administration, 8675309, sj@example.com, 360-397-1004.
- Status:** Open (dropdown)
- Impact:** Individual user (dropdown)
- Urgency:** Minor (dropdown)
- Priority:** Low (dropdown)
- Assignee:** Barry White (dropdown)
- Created:** 12/18/2013 10:01:58 AM
- Modified:** 12/18/2013 11:10:59 AM
- Closed:** (checkbox)
- Number:** DCIB128998
- Type:** Normal
- Rule:** Change Default (dropdown)
- Group:** CategoryServer, Internal Systems, Operating System, Windows
- Related Hierarchy:** A horizontal bar chart showing progress: 0% to 100%. The bar is green (Finished) up to approximately 50%, yellow (In Progress) from 50% to 100%, and red (Future) is not visible. Below the chart, two items are listed: 'Windows update required for critical servers. - Open (Current)' with a yellow circle, and 'Schedule updates for Accounting servers. - Closed' with a green circle.

At the bottom, there is a tabbed interface with 'Details' selected. The 'Details' tab shows:

- Reason:** Network connections dropping
- Description:** Windows update required for critical servers.
- Results:** Applied Windows update successfully.
- Scheduled Implementation:** 12/27/2013 12:00 A
- Actual Implementation:** (empty)
- Due:** 12/31/2013 12:00 A
- Review:** 12/31/2013 5:00 PM

iSupport's configurable Change screen

Configuration Management Database

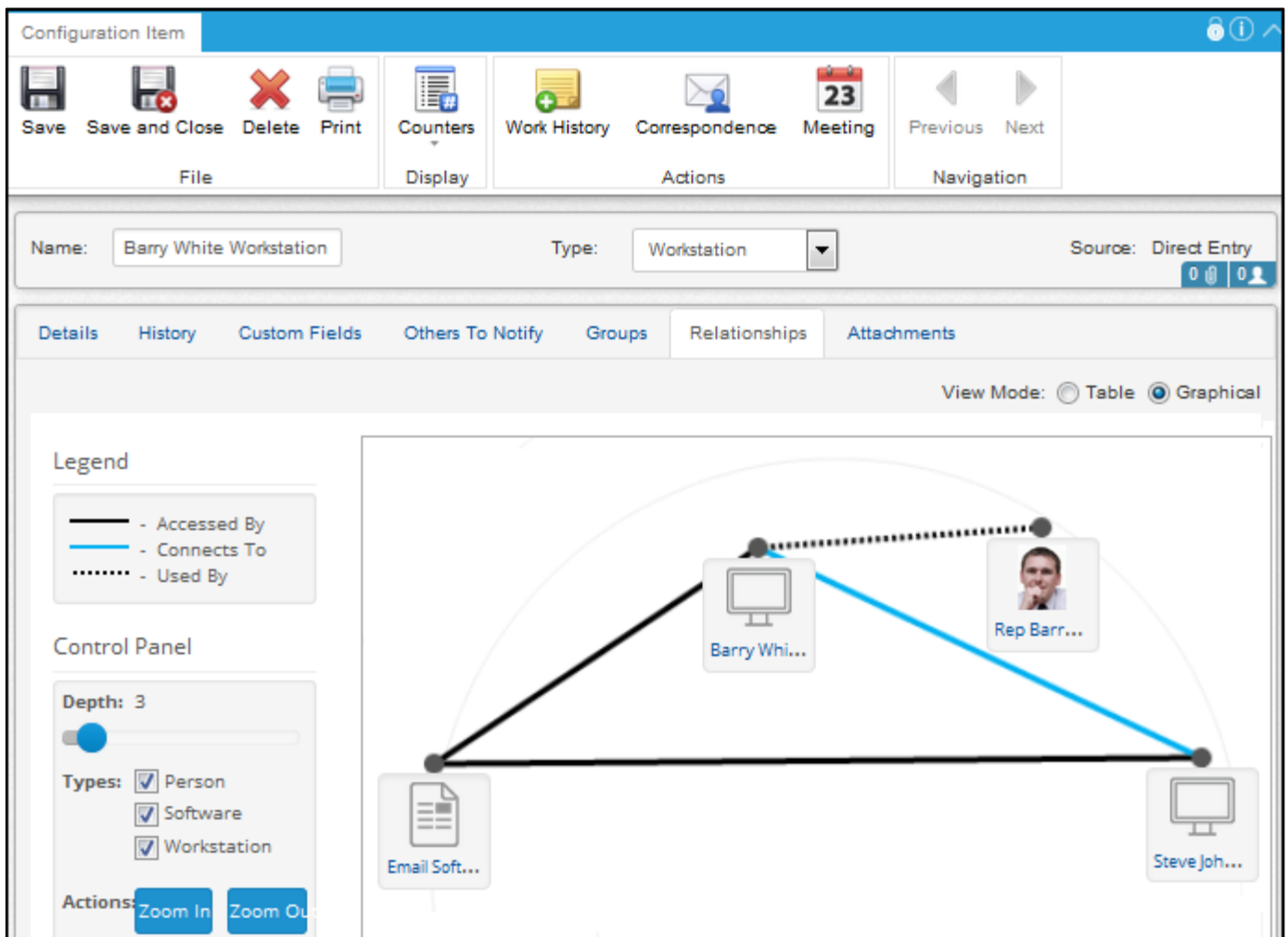
A configuration management database (CMDB) is a repository of information related to all the components of an information system. In the ITIL context, a CMDB represents the authorized configuration of the significant components in an IT environment.

iSupport's CMDB is used to track the assets, services, and other resources that are crucial to your organization's operation. The key goal of iSupport's CMDB is to help your company understand the relationships between these components and track their configuration.

These items and their relationships are graphically displayed so you can immediately answer questions about events - planned or unplanned - that may impact aspects of your company's IT operations.

Some of these questions might be:

- Is this item currently operating?
- What other items are dependent on this item?
- What is this item's critical hours/schedule of operation?
- Is there a backup and/or reroute plan for taking this item down?
- Who is the approver or primary person to notify regarding the item status (or proposed status)?
- What other users will be affected?
- Who else needs to be notified of the work to be done and its scheduled time frame?



iSupport's configurable Configuration Item screen

Service Level Management

No amount of issue, problem, and change 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 for incidents, problems, and changes.

Rule groups are applied to incidents, problems, and changes through customers, companies, category combinations, and incident and change templates 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 the 'Rule type is' is set to 'Time-Based' and 'Hours of Operation' is set to 'Default Hours of Operation'. The 'Match' section shows 'All' of the following conditions: 'Priority' is 'Emergency'. The 'Configure Time Frame Intervals and Actions' section shows an interval of '1' at '8.00' 'Hours'. The 'Action' section is configured to 'Notify' the 'Assignee (via email)' with the 'Default Notification' template, specifically '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 Change screen for a customer issue. The interface includes a top menu bar with 'Change', 'New', and 'View' options. Below the menu is a toolbar with icons for File (Save, Save And Close, Print, Delete), Display (Font Size, Counters), and Actions (Add History, Route, Hierarchy, Sign, Categorize, Customer, View Related, Override Data, Templates, Ad Hoc Approval). The main content area is divided into two sections: a customer profile and a task list.

Customer Profile:

- Customer:** Steve Johnson, LBLSoft, Inc., Headquarters, Administration, 8675309, sj@example.com, 360-397-1004
- Number:** DCIE193124
- Assignee:** Barry White
- Category:** Administration, New Employee, Workstation, Setup
- Status:** Open
- Created:** 12/18/2013 1:08:20 PM
- Impact:** Department
- Modified:** 12/18/2013 1:09:50 PM
- Urgency:** Minor
- Closed:** (checkbox)
- Priority:** Low
- Type:** Normal
- Rule Group:** Change Default

Related Hierarchy:

A progress bar shows the workflow status: 0% to 55% is yellow (In Progress), 55% to 100% is red (Future). A legend indicates: Green = Finished, Yellow = In Progress, Red = Future.

Workflow Steps:

- Process New Employee - Open (Current) (Yellow circle)
- Arrange Orientation - Open (Yellow circle)
- Add Network Account (Red circle)
- Finish Paperwork (Red circle)
- Complete Employment Contract - Open (Yellow circle)
- Set Up Cubicle (Red circle)
- Assign Telephone - Open (Yellow circle)

Workflow displayed in iSupport's Change screen

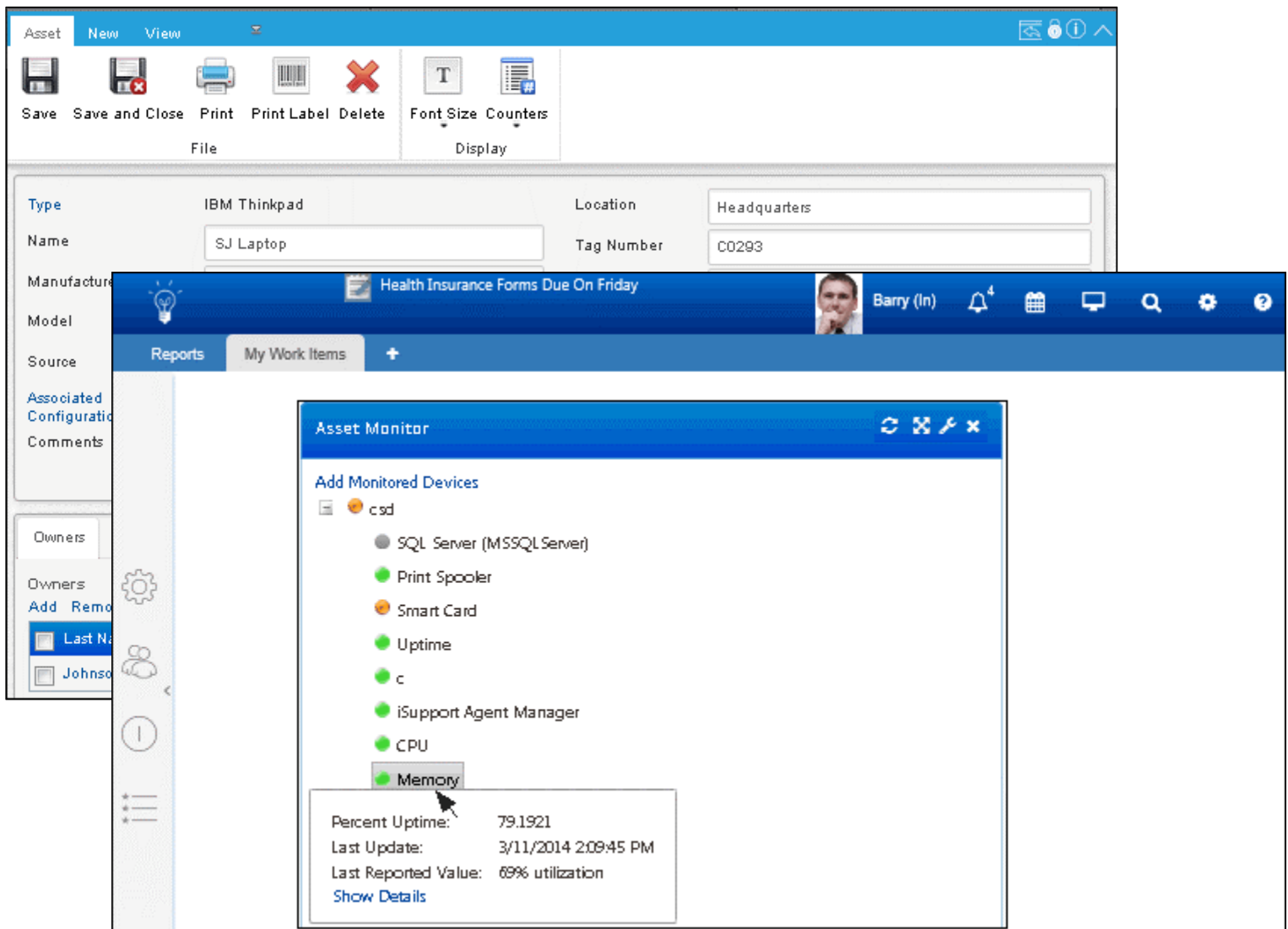
Asset Management

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.



iSupport's configurable Asset screen and Desktop Asset Monitor

Purchasing

Comprehensive purchasing functionality enables iSupport users to manage the complete lifecycle of the IT service process, and track all aspects of a project from start to finish. Request and track products and services, and associate those requests with Incident, Problem, Change, and Asset records.

iSupport's Purchasing functionality enables you to do the following for tracking your IT purchases throughout your service desk:

- Tie purchase requests to Incident, Problem, Change, and Asset records
- Implement an approval workflow to ensure accuracy and completion

- Record and charge back time worked against purchase requests and billing of time and materials
- Control purchase request functionality through support representative permissions
- Create asset records from purchase requests once items have been received
- Create and leverage templates for frequent purchase requests
- Integrate with Microsoft® Office Outlook® Calendar and Google Calendar™
- Chat with support representatives viewing the same work item

The screenshot displays the iSupport Purchasing interface. At the top, there is a navigation bar with 'Purchase' selected, and options for 'New' and 'View'. Below this is a toolbar with icons for 'Save', 'Save and Close', 'Print', 'Delete', 'Font Size', 'Counters', 'Work History', 'Add Asset', 'Use Template', 'Ad Hoc Approval', 'Previous', and 'Next'. The main content area is divided into several sections:

- Metadata:** Recipient (Steve Johnson), Requested By (Steve Johnson), Bill To (Steve Johnson), Author (Barry White), Number (E3G7294389), Status (Open), Request Number (8675309), Cost Center (Accounting), and Job Function (Manager).
- Details:** A tabbed interface with 'Details' selected. The 'Short Description' is 'Tooshiba printer replacing outdated one in Accounting department.'
- Line Items:** A table showing the purchase details for a printer.

Asset Type	Vendor	Product	Comments	Delivery	Expected	Quantity	Rate	Amount	Asset Create
Printer	Office Supply Depot	Toshiba Printer	Edit	3/20/2014	3/20/2014	0 of 1	2,000.00	\$2,000.00	<input checked="" type="checkbox"/>
									\$2,000.00

iSupport's configurable Purchase Request screen

Service Catalog

iSupport's Service Catalog functionality enables customers to request services, products, policies/procedures, etc. utilizing Change and Purchase templates.

You can create service catalogs with multi-level lists of entries which can include a name, configuration item, Purchase Request or Change template, and a header, footer, and image for the page presented to the customer.

A Purchase Request or Change record can be created after a service catalog request is submitted by a customer, and the configuration item specified for the service catalog entry will be associated with it.


You can trigger approvals by associating an approval cycle with the Purchase Request or Change template on a service catalog entry, and initiate ad hoc approvals on a Purchase Request or Change record created from a service catalog entry.

You can also restrict access to service catalog entries using Group Access functionality.

The screenshot displays the Service Catalog interface. At the top, there are two main sections: "Services" and "Supplies and Forms".

- Services:**
 - Staff Services:** Click here to request training, consulting, and HR assistance.
 - Customer Services:** Training and IT services.
- Supplies and Forms:**
 - Office Supplies:** (partially visible)
 - Customer Services:** (partially visible)

The "Customer Services" section is expanded, showing a tree view of items:

- Customer Services (\$100.00)
 - Accounting Application Trai...
 - Accounting Training 
 - Accounting Training (\$10...
 - Security Clearance Requ...
 - Company Orientation
 - Workstation Configuration
 - Laptop - Windows
 - Laptop - Macintosh
 - Webinar Registration

The detailed view of the selected "Accounting Training" item shows the following fields:

- Name:** Accounting Training
- Quantity:** 1
- Rate:** \$100.00
- Amount:** \$100.00
- Asset Type:** Training
- Vendor:** Technology PCS (Company)
- Delivery Date:** (empty)
- Expected Date:** 6/30/2016
- Comments:** Are materials included?

An "Apply" button is located at the bottom right of the detailed view.

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/View3>

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

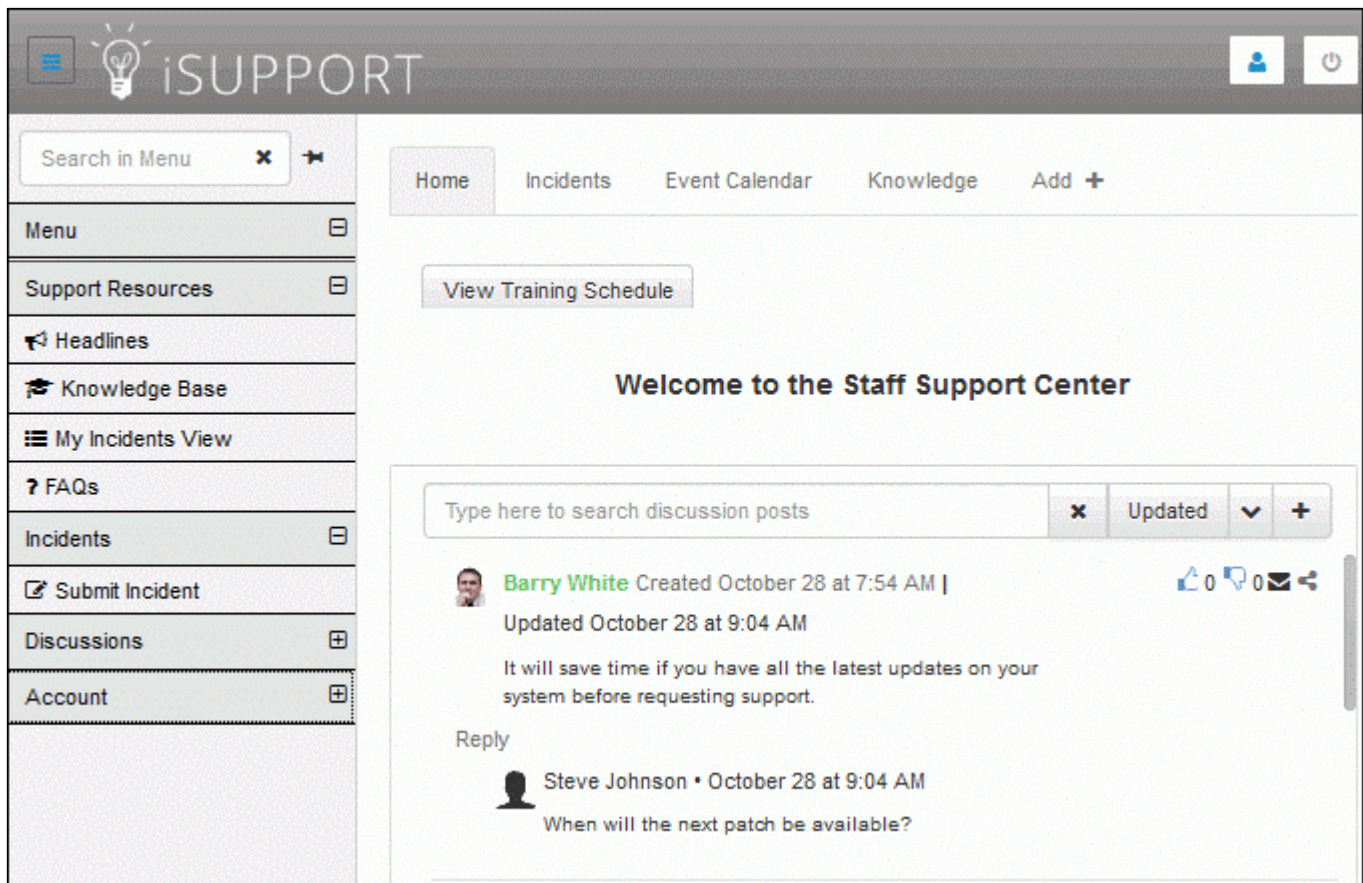
End User Self-Support

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

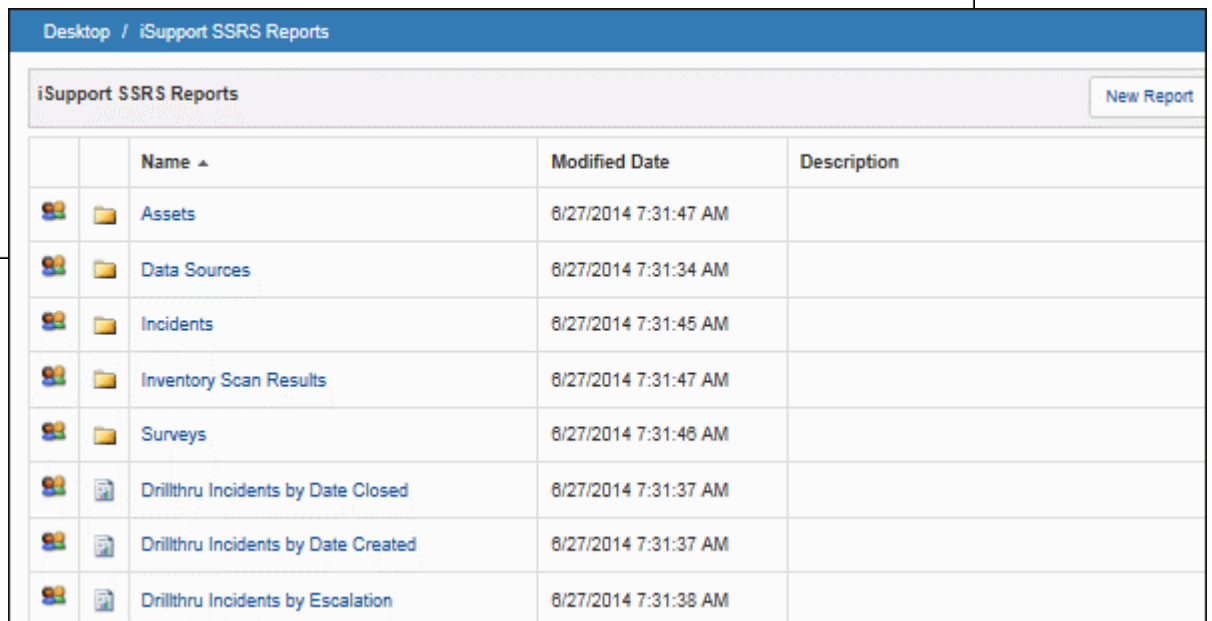
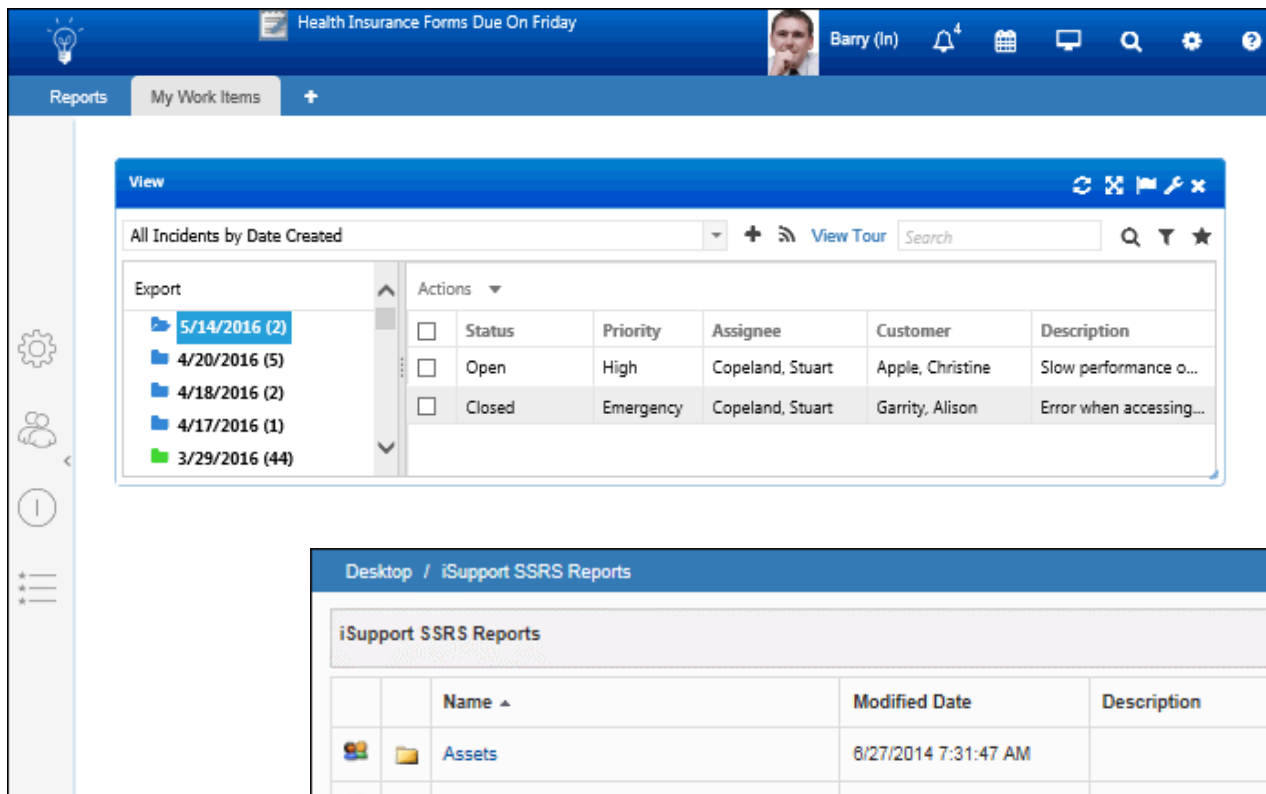
iSupport includes a number of preformatted views that enable you to quickly see information that meets basic sets of criteria; for example, "All Incidents by Date Created". You can place more frequently used views into a Favorites list to enable quicker access to common usage views.

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.



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.

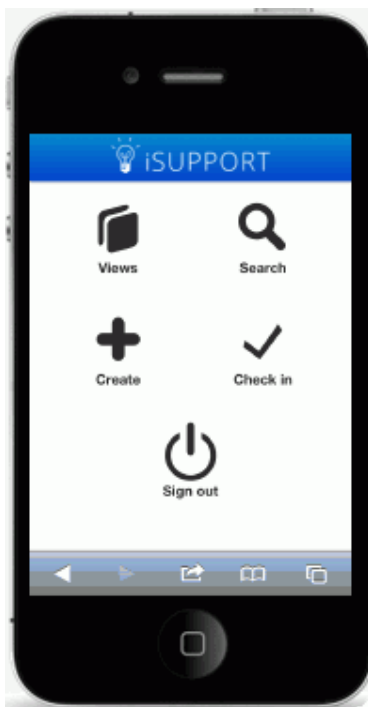
You can access iSupport via a tablet, smart phone (iPhone or Android), or WAP (Wireless Application Protocol) phone for in-the-field updates to iSupport data, inside or outside the firewall, with interfaces optimized for your device.

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

