

iSupport[®] 9.0

Service Desk Edition

iSupport 9.0 - Overview

iSupport Version 9.0 Service Management Edition delivers exciting new features to your service desk, beginning with an all-new identity. iSupport 9.0 marks a rebranding effort and is the follow-up release to the wildly popular c.Support 8.0.

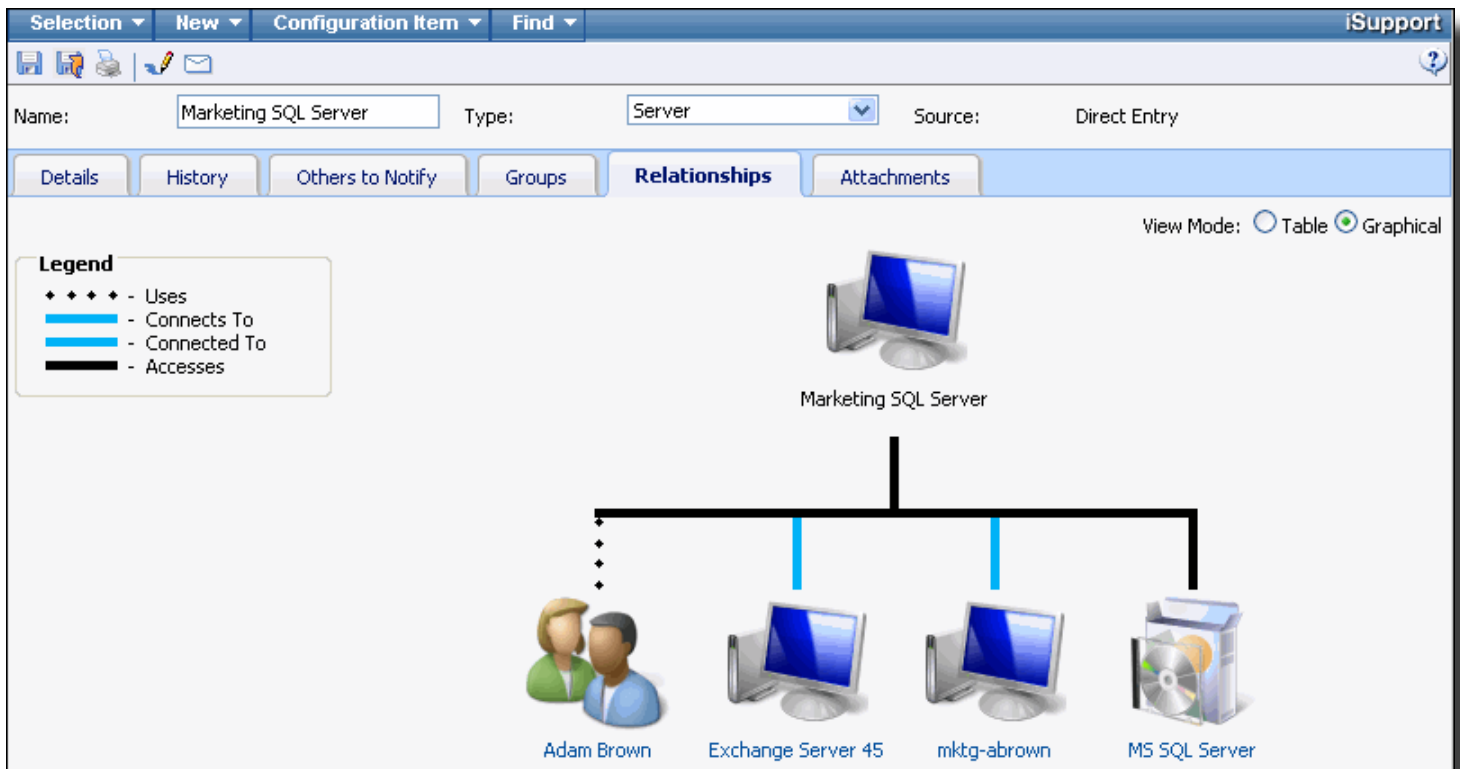
“For a number of years we have owned the rights to the iSupport.com domain,” comments Daren Nelson, CEO of GWI Software. “We have always intended to use the iSupport name as we believe it better describes our products and their functionality. As with anything this complicated, it simply takes time to work through all of the legal and technical issues. With all of the new functionality we are delivering in release 9.0 and the award of the trademark by the USPTO, now is the right time to rebrand the product. This rebranding does not signal any change in ownership, management, or operating philosophy.”

iSupport 9.0's key new module is a Configuration Management Database 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.

Another fundamental enhancement in iSupport 9.0 is full cross-browser compatibility. iSupport 9.0 now supports IE 7 and 8, Firefox, Chrome, and Safari.

Another exciting enhancement allows the already powerful approval management engine to graphically display approvers and status of approvals in the process, as well as a new ability for users to initiate an ad hoc approval cycle and modify approvers.

iSupport 9.0 now also enables you to create and manage service contracts for your customers.



iSupport 9.0's New Configuration Management Database Functionality

iSupport 9.0 - Incident Management

Service 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 at any point 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, or self-help End User Desktop
- Customer information fields
- Description and resolution fields
- Custom fields
- Related incidents, assets, problems, changes
- 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
- Access to knowledge base
- Approval, audit, correspondence, customer, SLA, and work histories
- Fully configurable threshold alerts and notifications
- Configurable display on the iSupport End User Desktop

The screenshot displays the iSupport 9.0 Incident Management interface. At the top, there is a navigation bar with menus for Selection, New, Incident, and Find. Below this is a toolbar with various icons. The main content area is divided into several sections:

- Customer Information:** Steve Johnson, 8675309, Headquarters, Administration, LBLSoft, Inc., 360-397-1004, sj@lblsoft.com. Customer History: Open: 22, Suspended: 0, Closed: 8, Reopened: 0.
- Incident Details:** Number: 9BDK332658, Status: Open, Impact: Individual user, Urgency: Minor, Priority: Low, Assignee: Barry White, Opened: 11/13/2009 7:22:15 PM, Followup Date: 11/16/2009.
- Categorization:** Administration, Existing Employee, Workstation, Other. Effective SLA: Top Level Support.
- Short Description:** Workstation Performance.
- Resolution:** Upgraded memory on workstation.

Navigation tabs include Details, History, Required Data, Assets, Scans, Others to Notify, Attachments, Associated Work Items, Approvals, Configuration Items, and Timeline.

iSupport 9.0 - Problem Management

After a customer's issue is taken care of, the cause of the issue may remain - at this point we create a Problem record. It 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 tracking problems:

- Problem record creation from the Incident screen 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
- Known error designation - known errors can be published on the iSupport Desktop and End User Desktop
- Correspondence
- Audit, correspondence, and work history fields
- Fully configurable threshold alerts and notifications
- Permission functionality for controlling Problem-related activities
- Predefined views; custom reports can be created using iSupport's SQL reporting feature

The screenshot displays the iSupport 9.0 Problem Management interface. At the top, there is a navigation bar with 'Selection', 'New', 'Problem', and 'Find' menus. Below this is a toolbar with various icons. The main content area is divided into several sections:

- Metadata:** Number: 8AME5A3284, Assignee: Barry White, Modified: 4/21/2009 10:12:24 AM. Fields for Impact (Department), Urgency (Major), and Priority (High) are shown as dropdown menus. Status is set to 'Open' and 'Publish to EUD' is checked. Categorization includes Server, Application Software, Groupware, and Email/Calendaring.
- Short Description:** A text field containing 'Email is not accessible'.
- Navigation Tabs:** Details (selected), History, Assets, Scans, Custom, Others to Notify, Attachments. Sub-tabs for 'Associated Work Items' and 'Configuration Items' are also visible.
- Description:** A text area containing 'All departments cannot access email through Outlook'.
- Workaround:** An empty text area.
- Root Cause:** A text area containing 'Exchange mailbox store dismounted.'
- Resolution:** A text area containing 'Mailbox store mounted, allowing system to respond to connection attempts.'

iSupport 9.0 - 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 requests related to services and assets:

- Change record creation from Incident screen, Problem screen, iSupport Desktop, End User Desktop
- Change type - standard (preauthorized), normal, or emergency
- Templates - can be defined in hierarchies
- Configurable status
- Routing
- Escalation
- Audit, work, correspondence, SLA, approval history fields
- Permission functionality for controlling Change-related activities
- Fully configurable threshold alerts and notifications
- Ad hoc and SLA-required approvals
- Creation of related Change records in a hierarchy structure
- Predefined views; custom reports can be created using iSupport's SQL reporting feature

The screenshot displays the iSupport 9.0 Change Management interface. At the top, there is a navigation bar with 'Selection', 'New', 'Change', and 'Find' menus. Below this, the main content area is divided into several sections:

- Customer Information:** Steve Johnson, 8675309, Headquarters Administration, IBLSoft, Inc., 360-397-1004, sj@ibsoft.com.
- Change Details:** Number: 98CA29317A, Assignee: Stuart Copeland, Status: Open, Modified: 11/12/2009 9:18:20 AM, Impact: Individual user, Urgency: Minor, Priority: Low, Type: Normal, Category: Hardware Laptop Hard Drive, Effective SLA: Top Level Support.
- Important Dates:** Scheduled Implementation: 11/17/2009 12:00 AM, Due: 11/15/2009 12:00 AM, Actual Implementation: [empty], Review: 11/16/2009 12:00 AM.
- Configuration Items:** Reason: [empty], Assistance Needed: [empty], Description: Hardware configuration services, Results: [empty].

At the bottom, there is a tabbed interface with 'Details' selected, and other tabs for 'History', 'Assets', 'Scans', 'Custom', 'Others to Notify', 'Attachments', 'Associated Work Items', and 'Approvals'.

iSupport 9.0 - Configuration Management Database

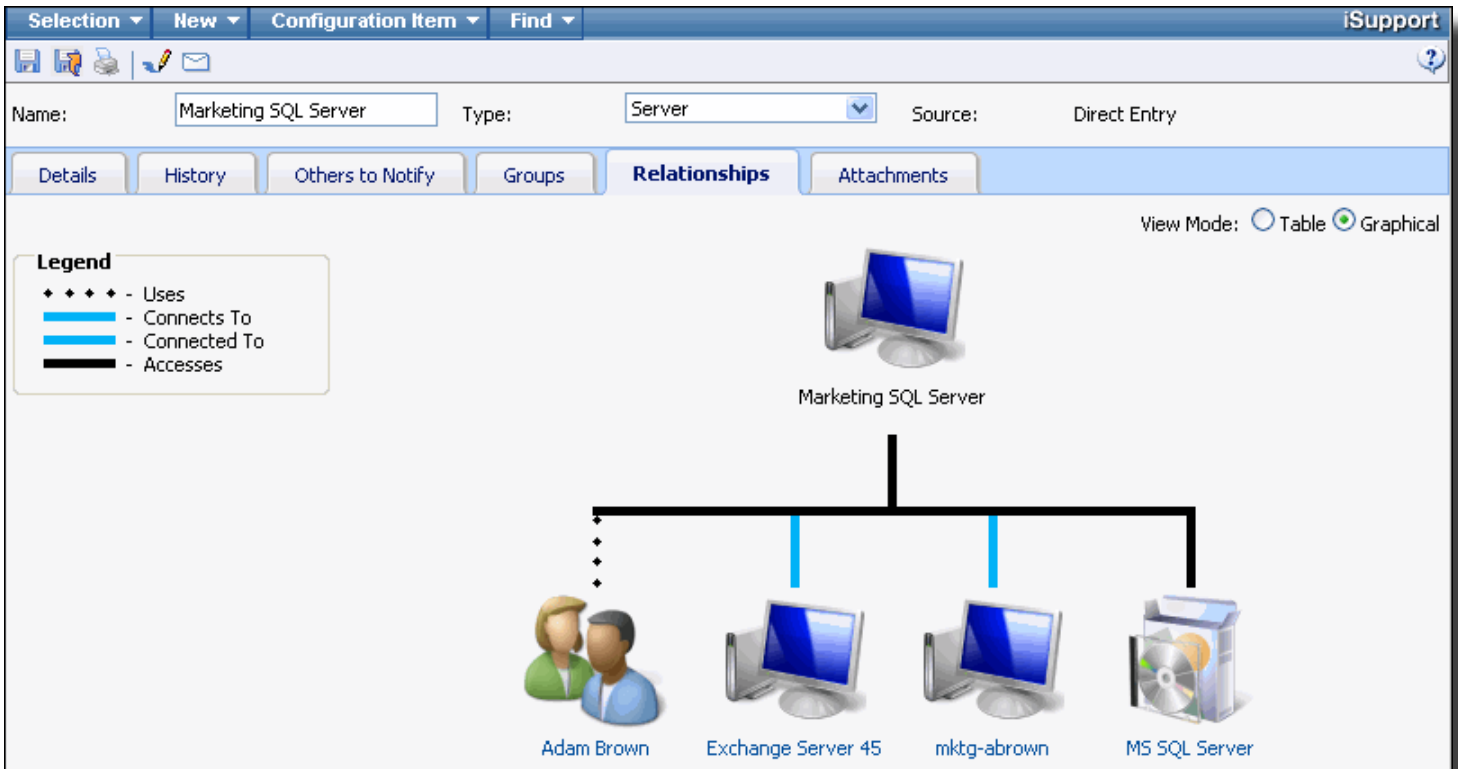
A configuration management database (CMDB) is a repository of information related to all the components of an information system. In the ITIL context, a CMDB represents the authorized configuration of the significant components in an IT environment.

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 timeframe?



iSupport 9.0 - Asset Management

Making informed decisions about future purchases can greatly assist your organization in running a smooth IT center. Do you purchase new hardware or pay for maintenance on existing equipment? 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
- Attached files
- Audit history
- Software license tracking
- Predefined views; custom reports can be created using iSupport's SQL reporting feature
- WMI and SNMP scanning methods

This functionality is integrated with iSupport's incident, problem, change, and purchase features for status visibility between all affected departments.

The screenshot displays the iSupport 9.0 interface for an asset record. At the top, there are navigation tabs for 'Selection', 'New', and 'Find'. The main header area shows the asset name 'BW Laptop', type 'IBM Thinkpad', and source 'Direct Entry'. Below this, there are several tabs: 'Details', 'History', 'Owners', 'Service Contracts', 'Custom Fields', 'Groups', and 'Attachments'. The 'Details' tab is active, showing fields for 'Model' (Thinkpad), 'Manufacturer' (IBM), 'Tag Number' (C8484), 'Serial Number' (1203948-1982374), 'Location' (Accounting Department), 'Purchase Date' (10/1/2009), 'Maintenance Expiration Date' (10/31/2010), and 'Warranty Expiration Date' (10/31/2010). A 'Comments' section contains the text 'Replaced motherboard on 10/05/09'. At the bottom, it indicates the 'Associated Configuration Item: BW Laptop'.

iSupport 9.0 - 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. In iSupport, you can set up service level agreements (SLAs) based on:

- Increasing priority levels. If an incident or change remains at a certain priority level without closure for a period of time longer than a specified time limit, it escalates to the next (higher) priority level.

- Reassignment using either skill based routing or group based routing. If the original assignee does not close an incident or change within a defined period of time, it will be automatically reassigned, based upon current workload, to a support representative with skill associated with the incident categories or a support representative in a group.

Notifications can be configured to be sent for all incident and change activities. Warning notifications can be configured to be sent before an incident or change escalates or exceeds a closure SLA limit. Notifications include incident details and a link to the incident or change, and you can customize notification text. Custom service level agreement settings can be configured and associated with customers, categories, companies, or templates.

Configuration > Incident Management > Service Level Agreements

Basics | Change Notifications | Change Increment Priority | Incident Notifications | Incident Increment Priority

Incident Closure | Incident Acknowledgment | Change Approvals | Incident Approvals

Name:

This is the default Incident SLA This is the Default Change SLA

Require Approval: For Incidents For Changes

Type of Escalation:

Routing Method: Skills Based Group Based Location By Skills Based

Hours of Operation:

Sunday Monday
 Start: 8:00 AM End: 5:00 PM Start: 6:00 AM End: 5:00 PM

Tuesday Wednesday
 Start: 6:00 AM End: 5:00 PM Start: 6:00 AM End: 5:00 PM

Thursday Friday
 Start: 6:00 AM End: 5:00 PM Start: 6:00 AM End: 5:00 PM

Saturday
 Start: 8:00 AM End: 5:00 PM

Blocked Dates:

November				December				January				February															
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
							1	2	3	4	5								1	2	1	2	3	4	5	6	
1	2	3	4	5	6	7	6	7	8	9	10	11	12	3	4	5	6	7	8	9	7	8	9	10	11	12	13
8	9	10	11	12	13	14	13	14	15	16	17	18	19	10	11	12	13	14	15	16	14	15	16	17	18	19	20
15	16	17	18	19	20	21	20	21	22	23	24	25	26	17	18	19	20	21	22	23	21	22	23	24	25	26	27
22	23	24	25	26	27	28	27	28	29	30	31			24	25	26	27	28	29	30	28						
29	30													31													

iSupport 9.0 - Service Catalog

iSupport 9.0 now includes Service Catalog functionality, enabling customers to request services, products, policies/procedures, etc. utilizing Change and Purchase templates.

Users can create a service catalog using a multi-level list of entries; each entry will include a name, configuration item, Purchase Request or Change template, and 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.

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.

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

The screenshot displays the 'Service Catalog Management' interface. The main configuration area includes fields for 'Service Catalog Name' (Consulting), 'Name' (Workstation Configuration), 'Template Type' (Change), 'Template' (Configure Hardware), 'Header Title' (Click Here for Details on Costs), and 'Header' (All associated costs will be charged to your budget). An image of a man is shown under the 'Image' field. The 'Configuration Item' is 'Support Rep Barry White' and the 'Associated Cost' is '\$100.00'. A 'Group Access' section is also visible.

An inset window shows a preview of a 'Hardware Requests' entry. It includes a tree view with 'Hardware Requests (Total Cost: \$500.00)' selected, which contains 'Add Laptop' (with radio buttons for Macintosh and Dell (\$500.00)), 'Add Extras' (with radio buttons for Add Mouse, Add Keyboard, and Add Memory), and a note: 'Please allow up to two weeks for shipping.' At the bottom, it states 'Current market prices will apply.' and has 'Preview' and 'Submit' buttons.

iSupport 9.0 - Workflow Management

Although service 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 9.0 interface. The main window shows a ticket with the following details:

- Number: 893C625781
- Impact: Individual user
- Status: Open
- Assignee: Barry White
- Urgency: Minor
- Type: Normal
- Modified: 9/3/2008 11:53:48 AM
- Priority: Low
- Customer: Steve Johnson
- Effective SLA: Top Level Support

An inset window titled "View Related Hierarchy - Windows Internet Explorer" is open, showing a hierarchical tree structure:

- Hire New Employee - Open (Current)**
 - Schedule Orientation*
 - Order and Install New Laptop - Open*
 - Create Network Account*
 - Complete Paperwork*
 - Finalize Employment Contract - Open*
 - Install Telephone*
 - Assign Telephone Number - Open*

Items in italics are components of a hierarchy template.
Items without a status are placeholders with dependencies.

iSupport 9.0 - End User Self Support

Create one or many End User Desktops and enable customers or distinct customer groups to view unique FAQs, search knowledge bases, submit and view incidents and changes, view problems, view informational headlines, and access web-based content to reduce the number of calls into the help desk.

Set up multiple interfaces to target different customer groups or create one interface and let iSupport dynamically control the information shown. Users can configure feature links and incident fields, create unique and specific branding imagery, and require customers to log in.

The image displays two screenshots of the iSupport 9.0 user interface. The top screenshot, titled "Technical Support", shows a user interface for "Eric Anderson". It features a sidebar with sections: "Resources" (Headlines, Problems, FAQs, Knowledge Base Search, Microsoft Support Site), "IT Support" (Report Incident, ERP Access Request, Report New Hire, Submit Change Request), and "View Work Items" (View Incidents, View Scheduled Changes, Records Pending Approval). The main content area includes "Headlines" (Equipment Maintenance Schedules, Dev Server 01 is Down), "Frequently Asked Questions (FAQs)" (How to: Contact GWI Sales, GWI Address and Hours Information), "Knowledge Base Search" (with a search box), "Additional FAQ Topics" (Information Technology (2), Human Resources (2)), and "My Incidents" (with a table listing dates, times, and descriptions). The bottom screenshot, titled "Sample End User Desktop", shows a similar interface for a "Home" page. Its sidebar includes "Support" (Submit Incident, View Incidents) and "Administration" (Log In, New User Registration). The main content area includes "Headlines", "Frequently Asked Questions (FAQs)", and "My Incidents" (with a login prompt).

iSupport 9.0 - Ad-Hoc Reporting

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.

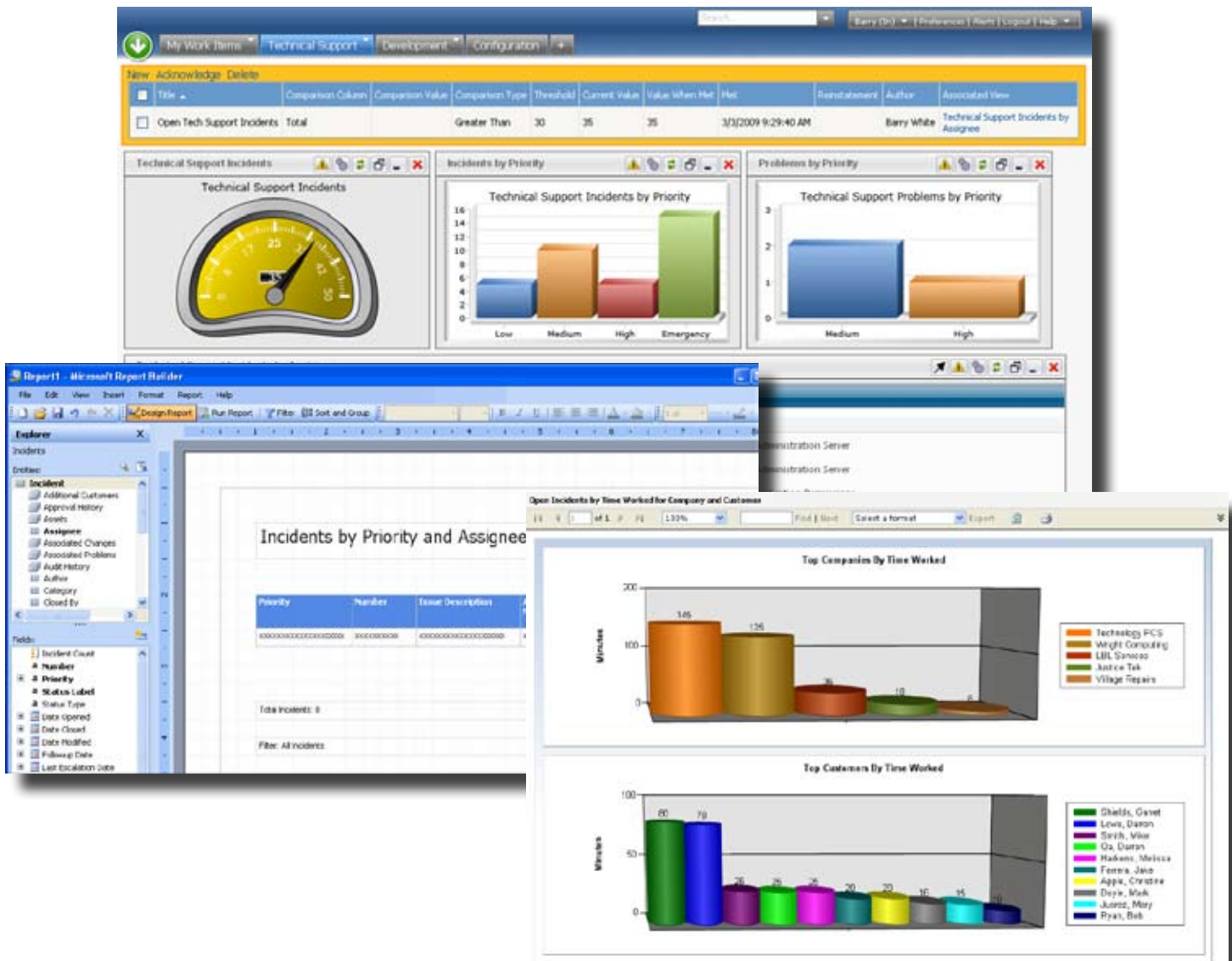
Standard Views

iSupport currently ships with a number of preformatted views that enable users to quickly see information that

meets basic sets of criteria. Examples: "All Incidents by Date Created" or "All Products by Asset Type." Users can place more frequently used views into a "favorites view" list to enable quicker access to common usage views.

View Designer

The new View Designer enables users to completely tailor what information they want to see. Pull data from practically any record in the system, apply filters and sorting selections, and order/display columns to individual requirements.



iSupport 9.0 - Knowledge Management

Integrating a knowledge management process into your service activities enables 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 service desk:

- Capture knowledge from resolved incidents and problems.
- Implement an approval workflow to ensure accurate and complete knowledge entries.
- Make expert knowledge available to front line support staff.
- Allow end users to search for solutions.
- Enable users to rank knowledge entries on usefulness. When future searches are performed, the results of the ranking will be used to order the returned entries.
- Integrate knowledge entries into the ticketing process to help reduce ticket count.
- Access and integrate optional standardized PC support content by subscription.

The screenshot displays the iSupport Knowledge Management interface. At the top, there are navigation tabs for 'Selection', 'New', and 'Knowledge'. Below the tabs is a toolbar with icons for file operations. The main form contains the following fields:

- Entry Number: 9ARB532824
- Author: Barry White
- Source: Direct Entry
- Created: 10/26/2009 10:42:17 AM
- Categorization: Hardware, Printer, HP Laserjet, Maintenance
- Status: In Progress

Below the form are four tabs: 'Issue', 'Information', 'Feedback and Rating', and 'Attachments'. The 'Issue' tab is selected, showing a description field with the text: 'How to perform maintenance on a laser printer'. Below the description is a resolution field with the text: 'Replace the toner cartridge and clean the printer. Toner cartridges are in Supply Room A. Leave the cartridge in the supply room for recycling.'

iSupport 9.0 - Purchase and Billing

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 includes the following for the tracking of your IT purchases throughout your service desk:

- Tie purchase requests to Incident, Problem, Change, and Asset records.
- 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.

Selection ▾ **New** ▾ **Purchase** ▾ iSupport

Recipient: Steve Johnson ⓘ Number: 9B5L575669 Cost Center: Accounting
 Requested By: Barry White ⓘ Status: ▾ Job Function: Manager
 Bill To: Unassigned Request Number:
 Author: Barry White ⓘ Modified: 11/5/2009 8:51:59 PM ⓘ

Short Description: ^{ABC}

Details | History | Custom | Attachments | Associated Work Items | Assets | Approvals

Comments: ^{ABC}

Add Line Item Delete Line Item

<input type="checkbox"/>	Asset Type	Vendor	Product	Comments	Delivery	Expected	Quantity	Rate	Amount	Asset Create
<input type="checkbox"/>	Printer	Technology PCS ⓘ	Laserjet Printer More...			11/12/2009	0 / 1	\$4,000.00	\$4,000.00	<input type="checkbox"/>
									Total: \$4,000.00	

iSupport 9.0 - Service Contracts

iSupport 9.0 now 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/or changes), hourly count (a specified number of hours), duration (time frame in days), or both (limiting the number of incidents and/or 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.

Alt Number: LBL-1 **Duration Count:** 10 **Notification Event:** Initial Save

Number: 9B4B325678 **Duration Count Type:** Hours Work Items

Name: LBL Contract Incidents Changes

Contract ID: 8675309 **Duration Start:** 11/4/2009 Customer or Company's Primary Contact

Status: Active **Duration End:** 11/4/2010 Internal Contacts

Type: Both **Send Expiration Reminder:** External Contacts

Modified: 11/4/2009 11:01:53 AM **Threshold Value:** 8 Incidents, Changes

Used: 0 / 10 Incidents, Changes **Days Before:** 2

Details | Hours of Operation | Blocked Dates | History | Contacts | Custom | Attachments

Comments: Contract covers all applications and hardware.

Customers: Add Remove				Companies: Add Remove				Assets: Add Remove						
<input type="checkbox"/>	Name ▲	Email	Phone	Company	<input type="checkbox"/>	Name ▲	Phone	Primary Contact	Primary Email	<input type="checkbox"/>	Name ▲	Serial Number	Tag Number	Type
<input type="checkbox"/>	Steve Johnson	sj@lblsoft.com	360-397-1004	LBLSoft, Inc.	<input type="checkbox"/>	LBLSoft, Inc.	360-397-1000	Steve Johnson	sj@lblsoft.com	<input type="checkbox"/>	Accounting Server	213412-23412-2412341	15346	Server

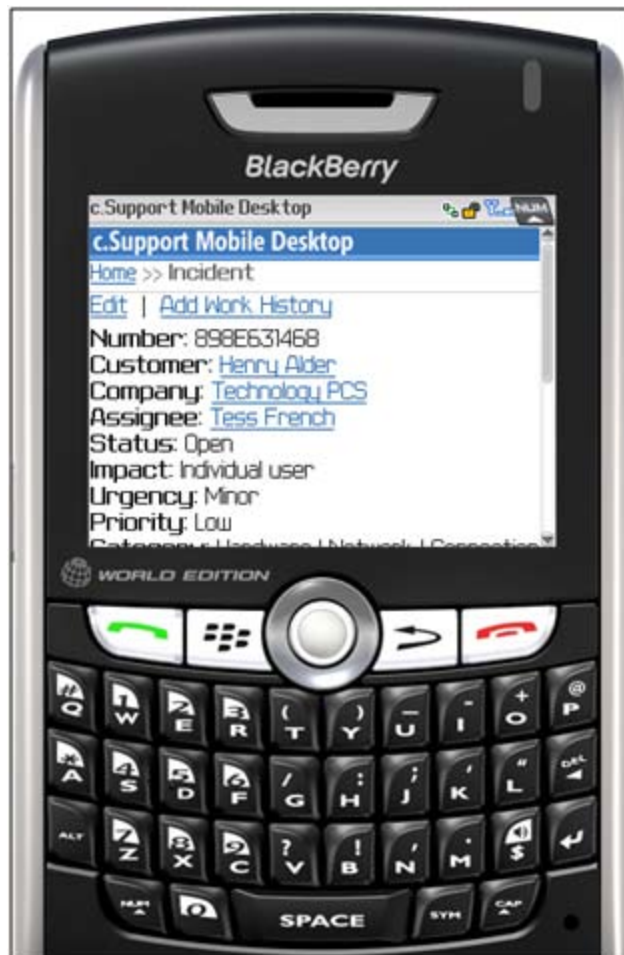
iSupport 9.0 - Mobile Microbrowser Desktop

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.

iSupport's Mobile Desktop functionality includes the following for the managing of incidents via a handheld:

- Enable technicians to access records via an iPhone®, Blackberry®, or other handheld device.
- Allow technicians to create, view, edit, close, and route Incident records.

- Allow technicians to view Customer Profile and Company records.
- Access via any HTML-compatible browser.
- Empower technicians to provide support from remote locations.





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