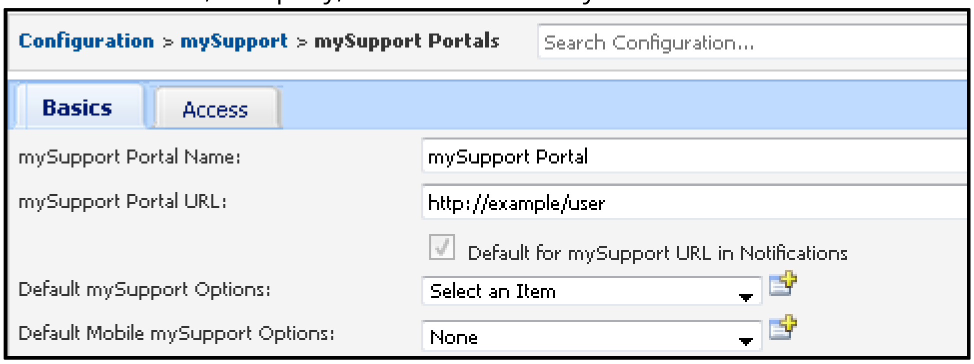
New in iSupport® v12.7

In addition to continued enhancement of code quality, this release contains the following features:

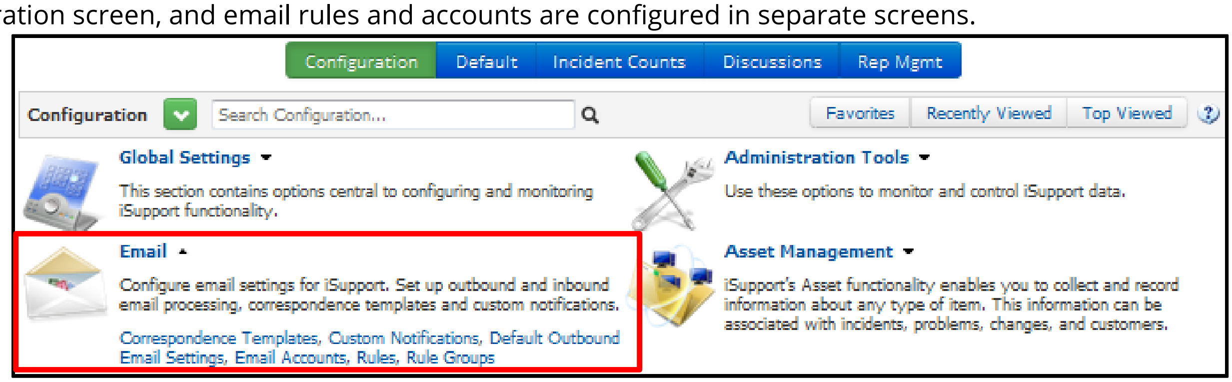
Social Client renamed to "mySupport"

iSupport's Social Client has been renamed to "mySupport" throughout the application. Note that this change will not affect existing Customer Profile, Company, and Social Client layouts.



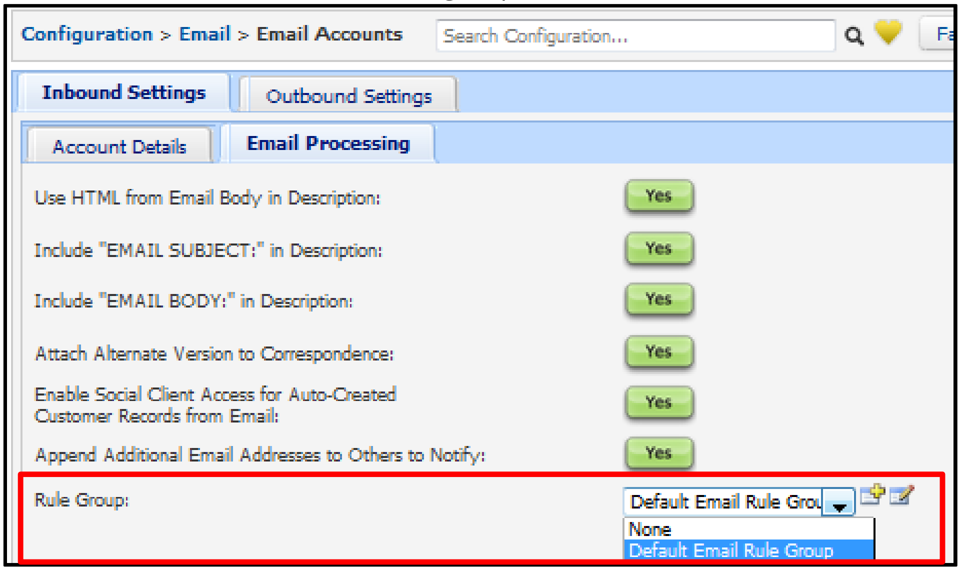
Email Processing

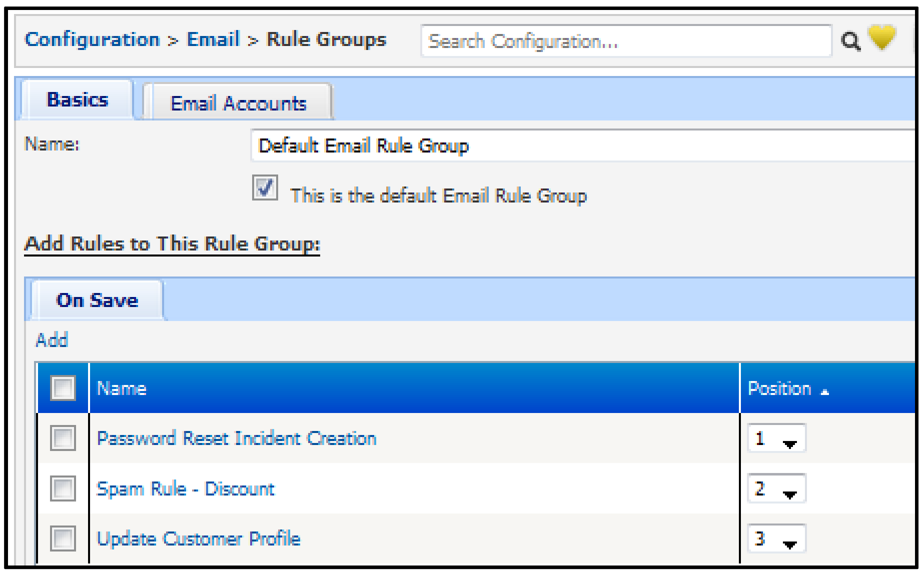
Links to iSupport's Email, Correspondence, and Custom Notification screens are now under the Email heading in Configuration. Default outbound email settings are now configured in a screen separate from the Email Account configuration screen, and email rules and accounts are configured in separate screens.



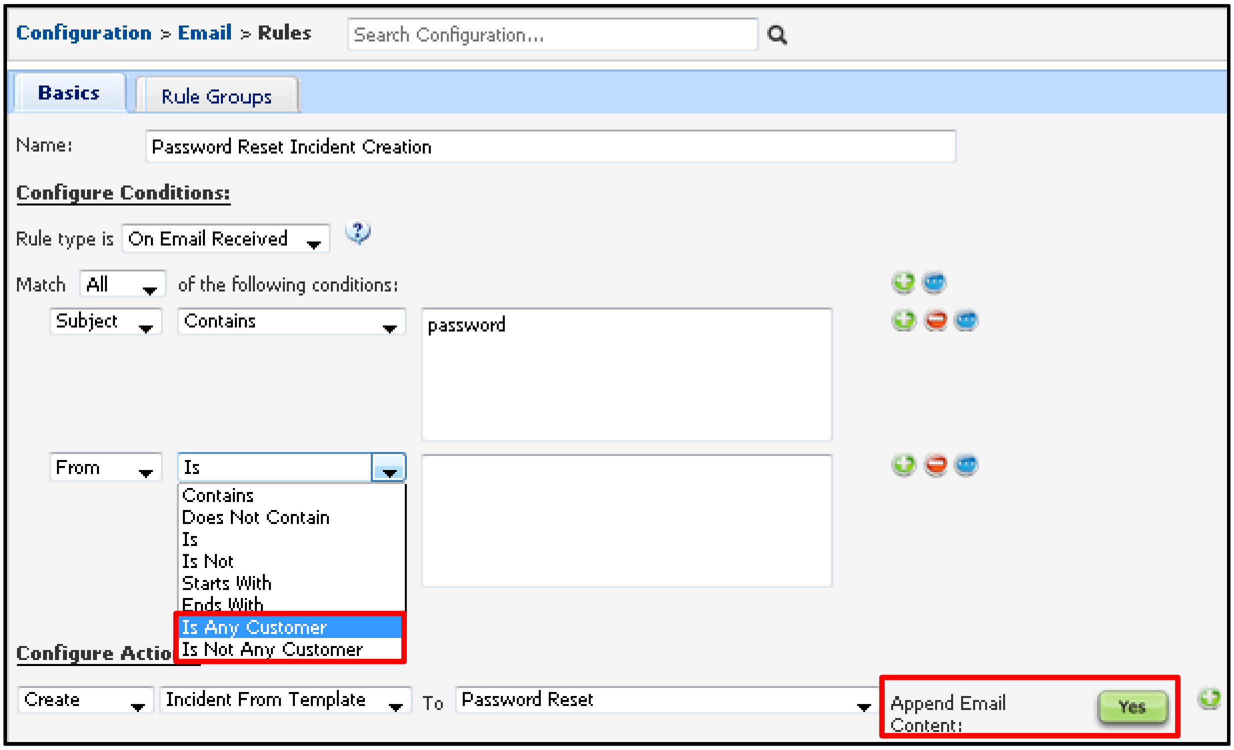
Email Rules and Rule Groups for Email Accounts

Email rule groups are now assigned to individual email accounts; email rule groups and rules are configured via a separate screen using the same interface as other iSupport rules. A default email rule group will be included in iSupport on installation or upgrade; upgrades to version 12.7 will convert previously configured email rules and place them in the default email rule group.





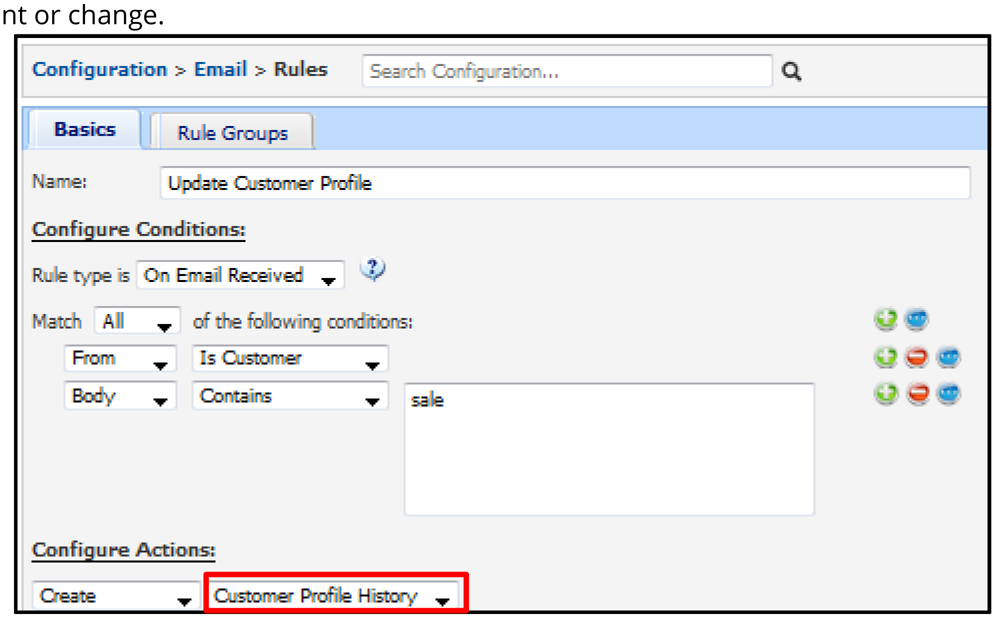
The Email Rule screen is shown below. Conditions operate on email fields; Is Any Customer and Is Not Any Customer comparison methods are now included within the From condition option.



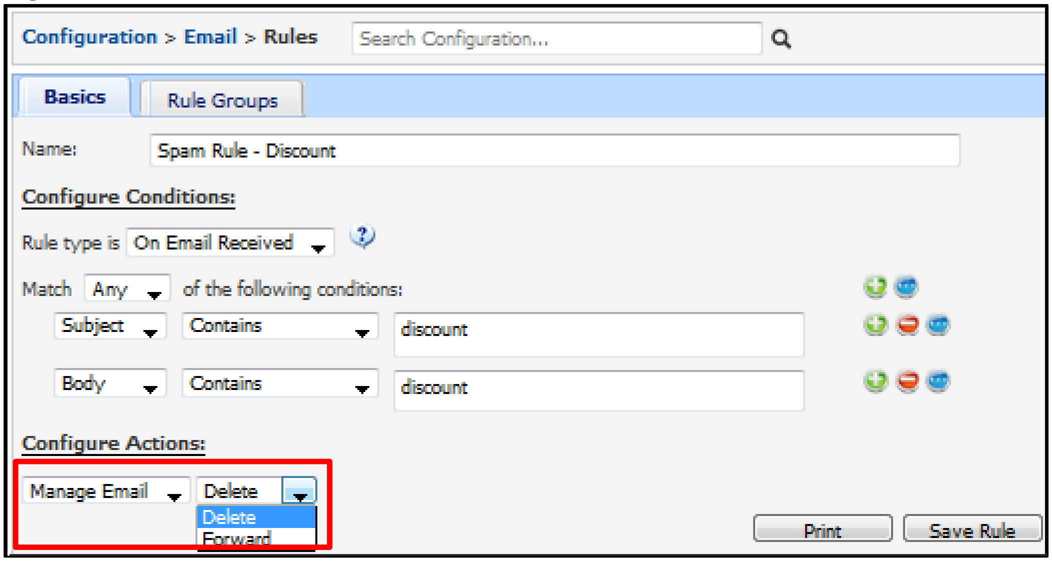
When configuring an action to create an incident or change using a template, use the Append Email Content button to enable the subject and/or body of the email to be added after the content in the template's Description field to the incident or change created by the rule. If the Short Description field is enabled, the subject line content will be placed in the Short Description field instead of the Description field. On a Change record, the subject line text will be included in the Reason field.

New Email Rule Actions

You can use the Customer Profile History rule action to update the history in the Customer Profile record instead of creating an incident or change.

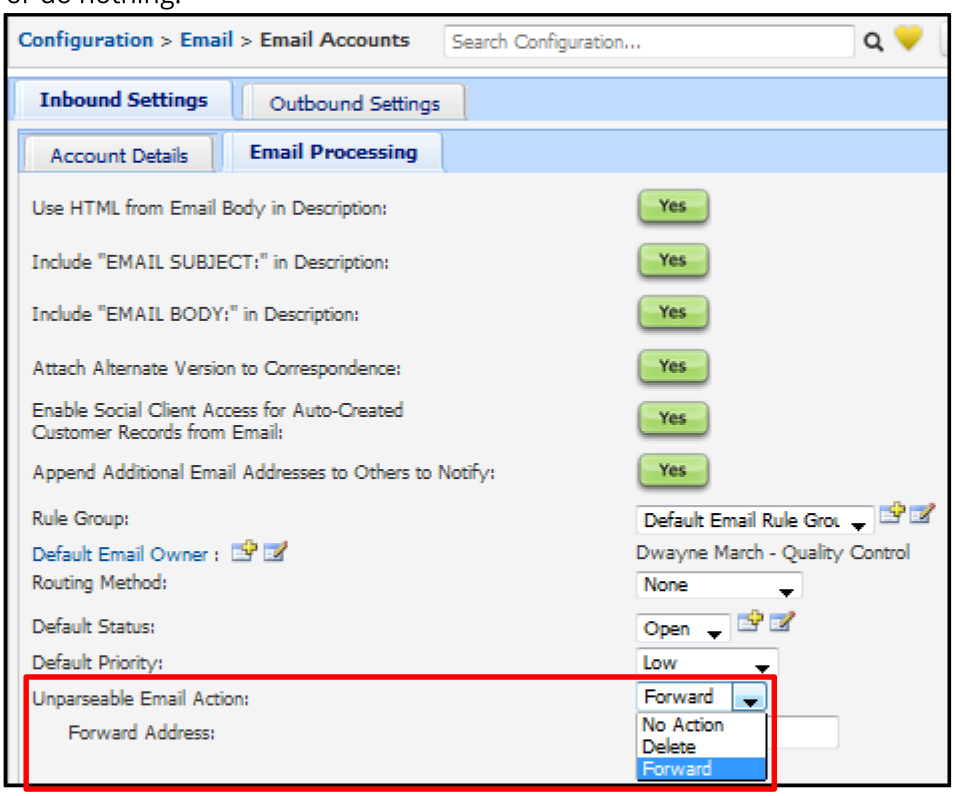


You can use the Manage Email rule actions to delete or forward an incoming email based on specified conditions. Note that the Delete action will permanently delete the incoming email, it will not be recoverable, and it will not be recorded in the log.



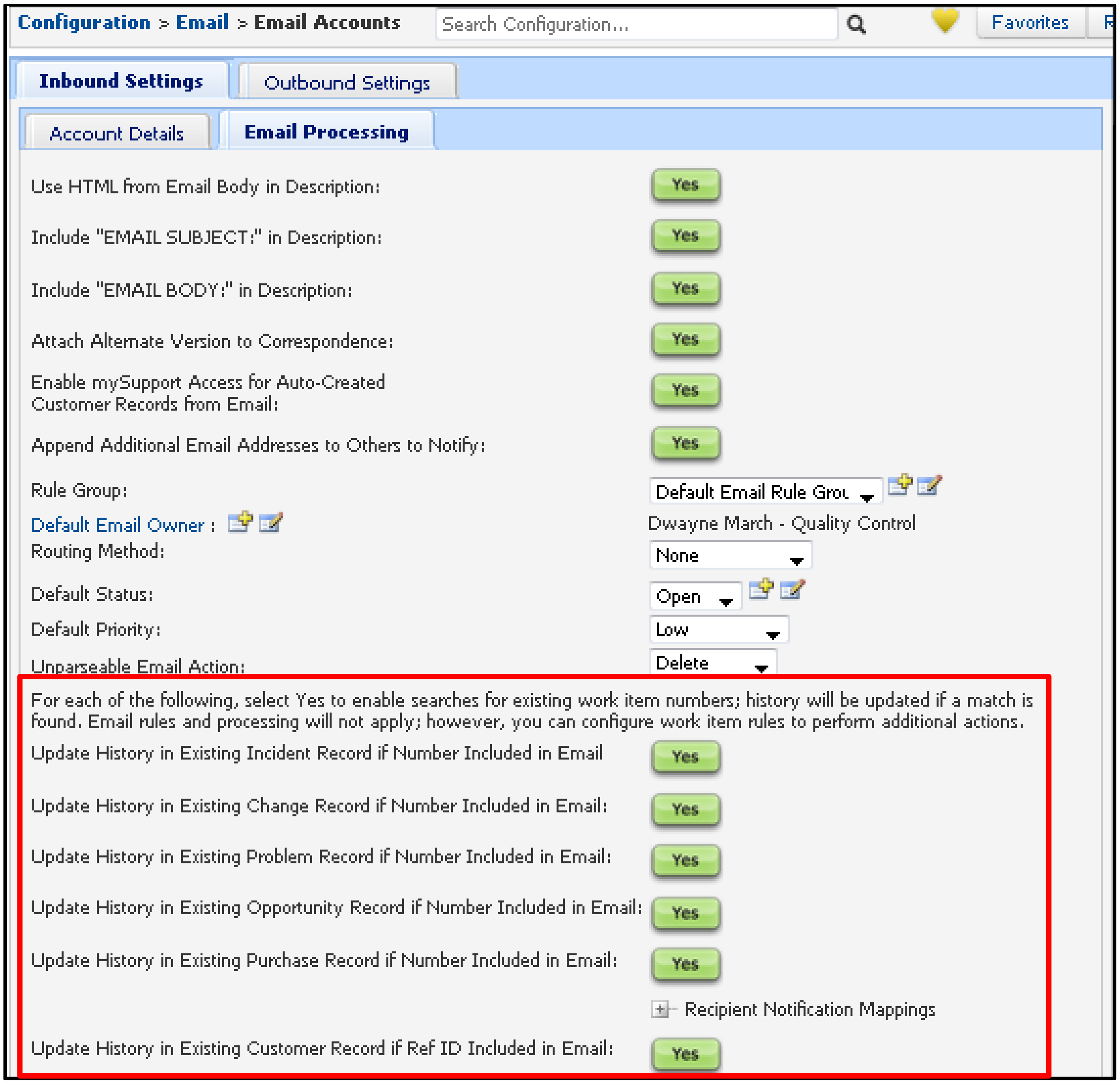
Configurable Handling of Unparseable Email

You can now set the action to occur when an incoming email is unparseable: delete the email, forward the email to a specified address, or do nothing.

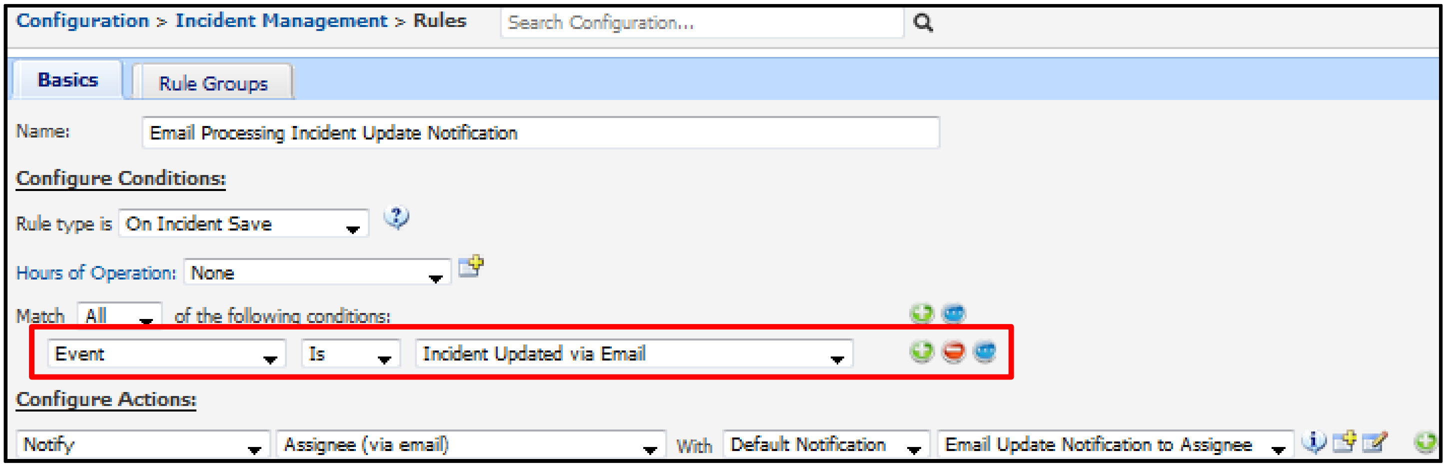


Additional Email Update Functionality

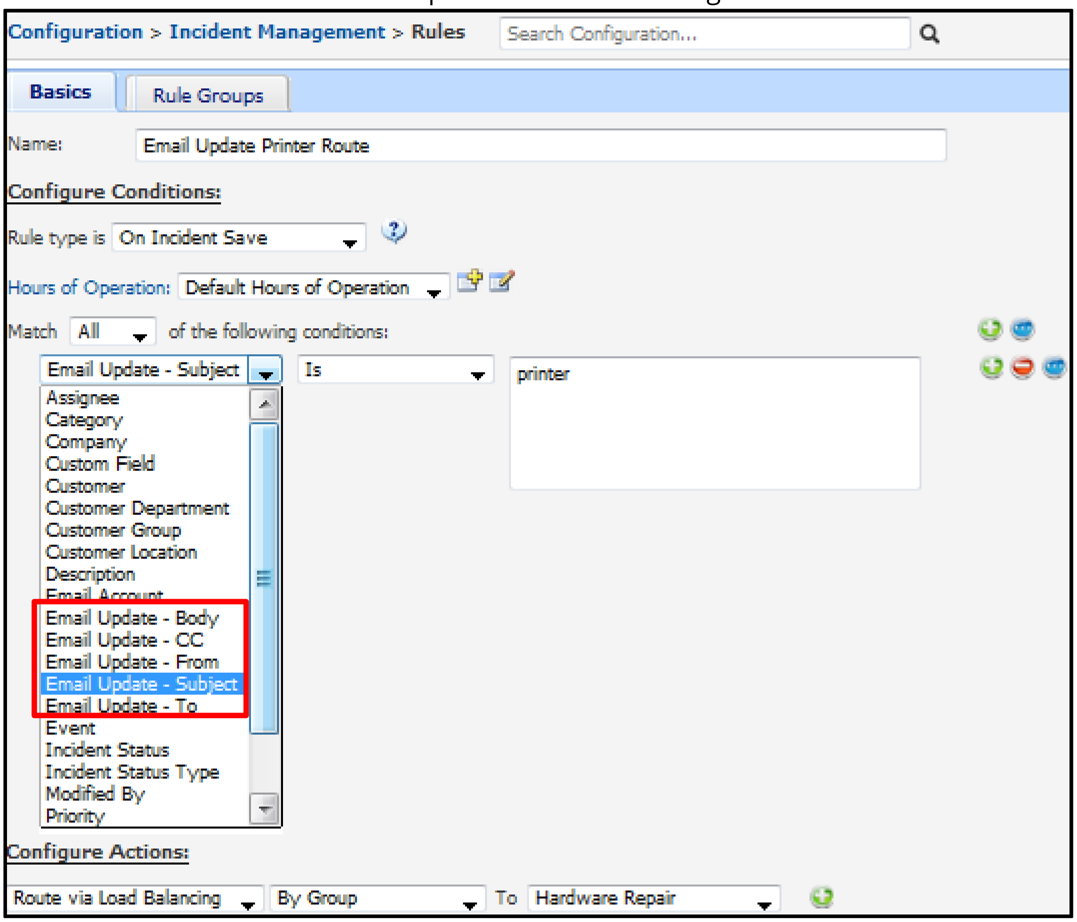
Basic email update functionality is still handled via the Email processing tab; if Yes is selected in an Update History… field and an existing work item number is detected in an incoming email, the History field will be updated and a new work item will not be created.



However, you can now use **work item rules** to configure additional actions if a work item is updated via email processing. An Incident Updated via Email event has been added so you can change field values, route, and send notifications to more types of recipients.



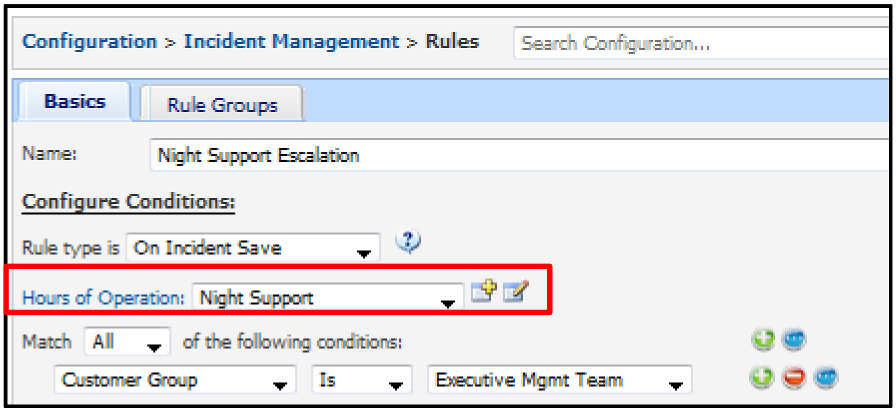
Email Update conditions have been added to work item rules for configuring actions to be performed if an email update is performed and content is detected in a portion of the incoming email.



Rules

Hours of Operation Setting for Rules

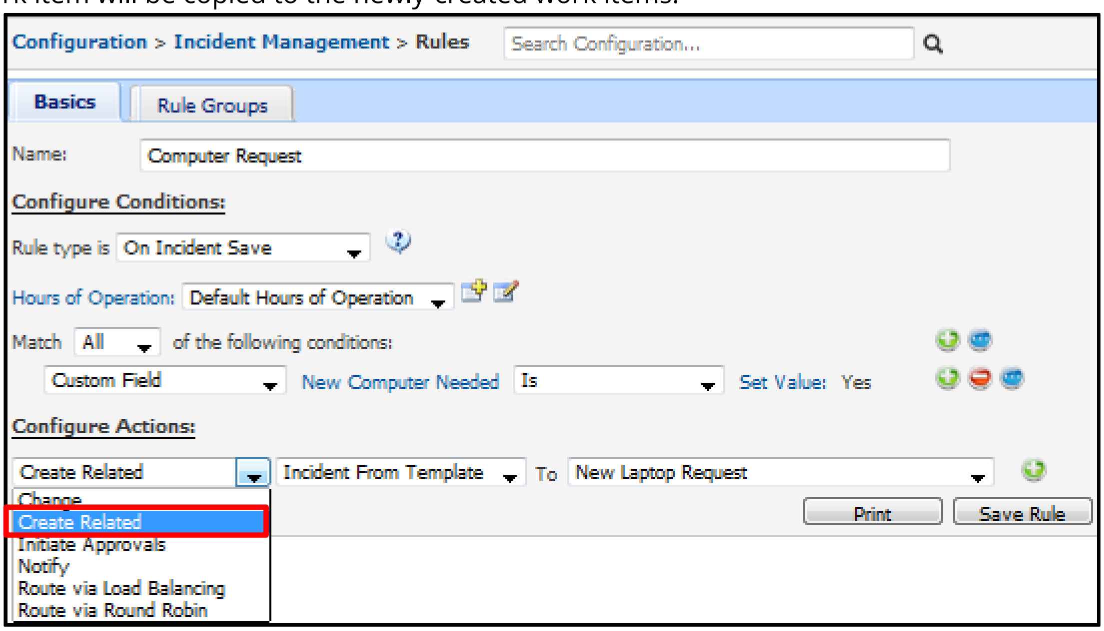
You can now assign defined Hours of Operation to incident, problem, change, and opportunity rules; this time frame will take precedence over any hours of operation assigned to a rule group. For on-save rules, this setting only applies when Within Business Hours is included in a condition.



New Conditions and Actions

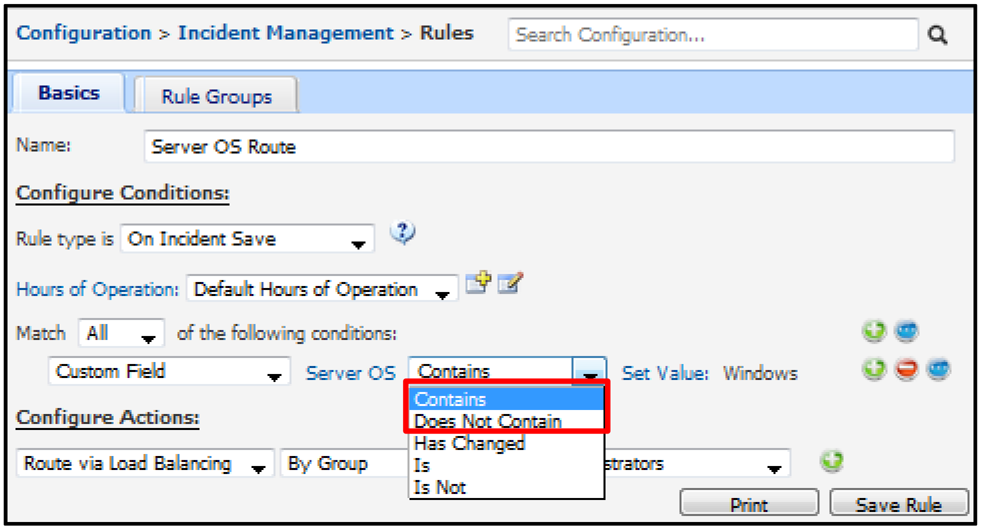
Create Related Work Item Action for Incident and Change Rules

You can now configure an incident or change rule to create a related work item using a template or hierarchy template. If the Inherit Custom Field Values on Hierarchies field configuration setting is enabled, custom values on the parent work item will be copied to the newly-created work items.



Contains Condition Option

A Contains option is now included when a custom field, Customer Department, Customer Location, Description, and any of the Email Update items are included in a rule condition. You can set a value as part of the condition.

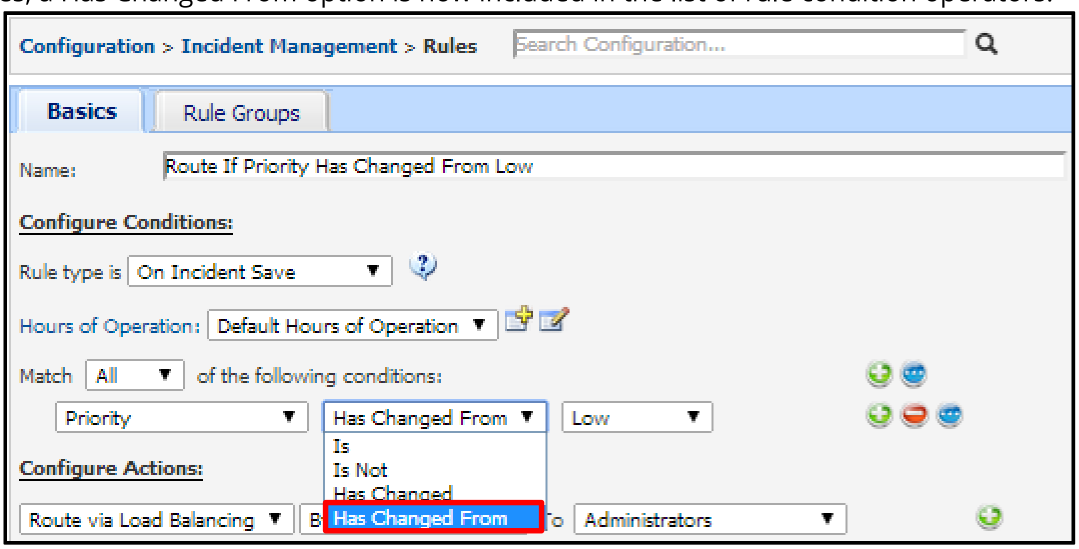


Modified By Condition Now Contains Any Customer and Assigned Customer Options

The Modified By condition now includes options for Assigned Customer (the customer assigned to the work item) and Any Customer (a customer that updated a work item via a mySupport portal).

Has Changed From Condition Option

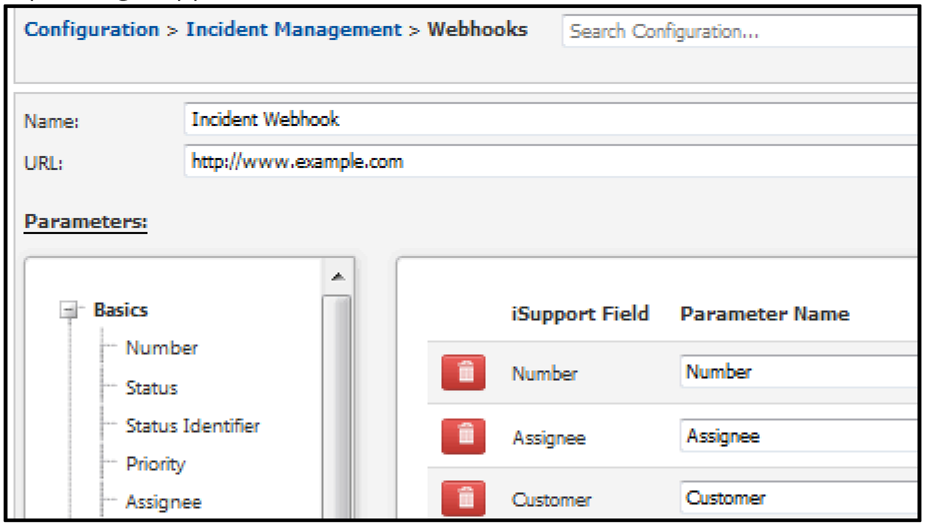
For all rule types, a Has Changed From option is now included in the list of rule condition operators.



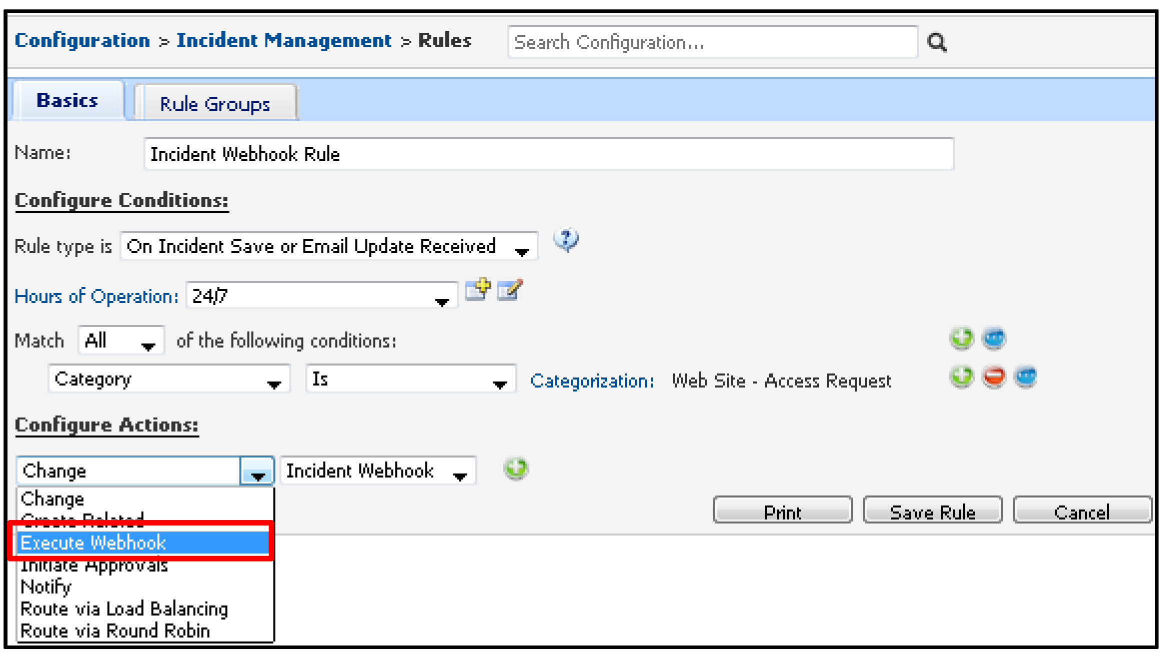
Webhooks

You can now configure webhooks for posting iSupport's incident, problem, change, customer, opportunity, knowledge, and email data to a web application. You will specify a web application URL for iSupport to post data to and the fields containing the data you want to receive, and iSupport will post the field data to the URL when configured rule conditions and timeframes are met.

Use the Webhooks screen to enter the URL to which iSupport data should be posted and map the fields on your web form to the corresponding iSupport data source field.



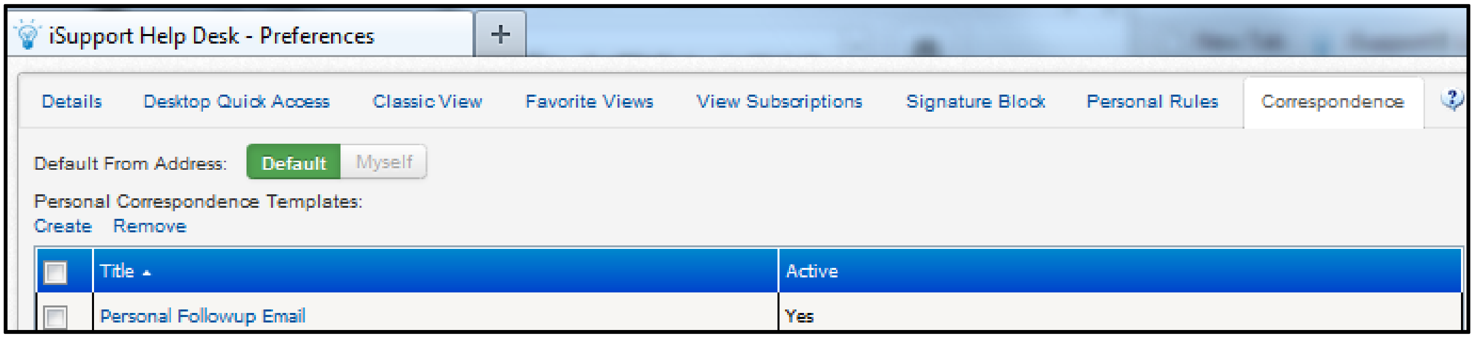
Use the Rule screen to configure the conditions and time frame for triggering the post action. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition.



Correspondence and Custom Notifications

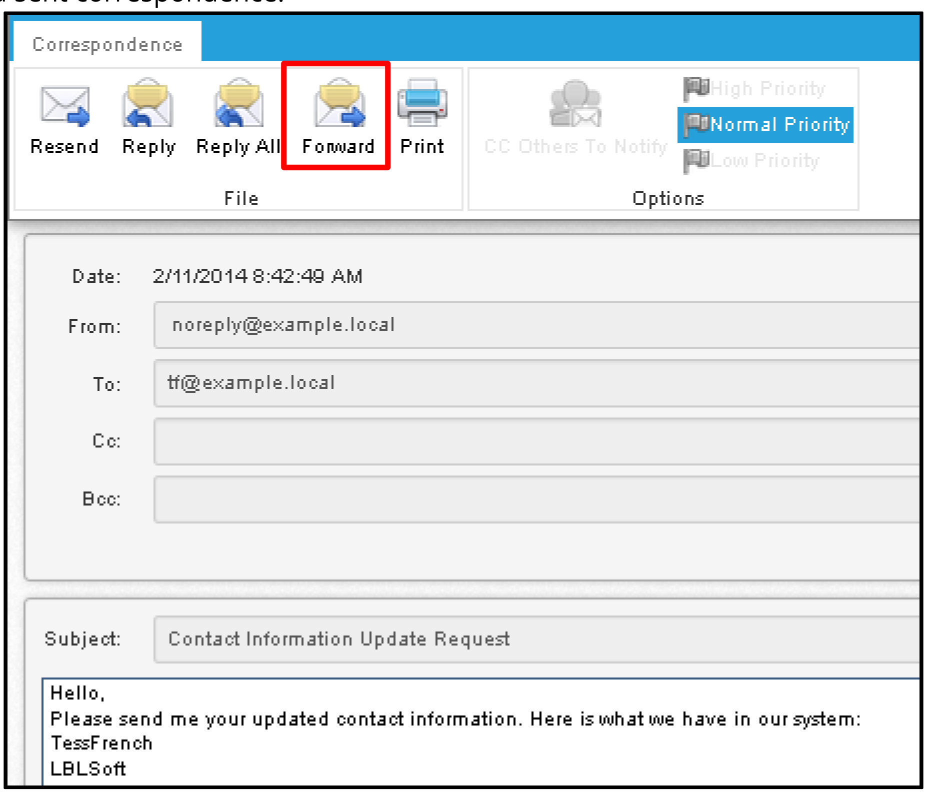
Correspondence Tab/Default From Address in Preferences

A Correspondence tab is now included in Desktop Preferences, and personal correspondence template functionality is included on it. A Default From Address field is included to enable a support representative to choose the email address in his/her support representative profile or the default, which is one of the configured email reply to addresses.



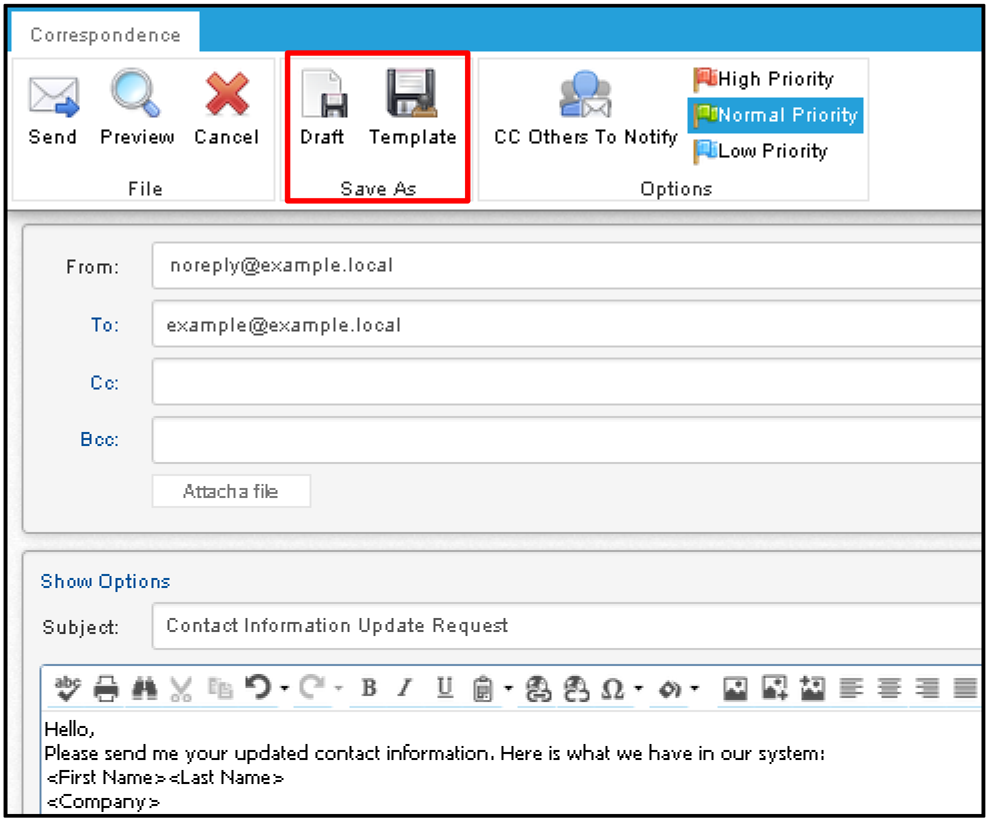
Forwarding Correspondence

You can now forward sent correspondence.

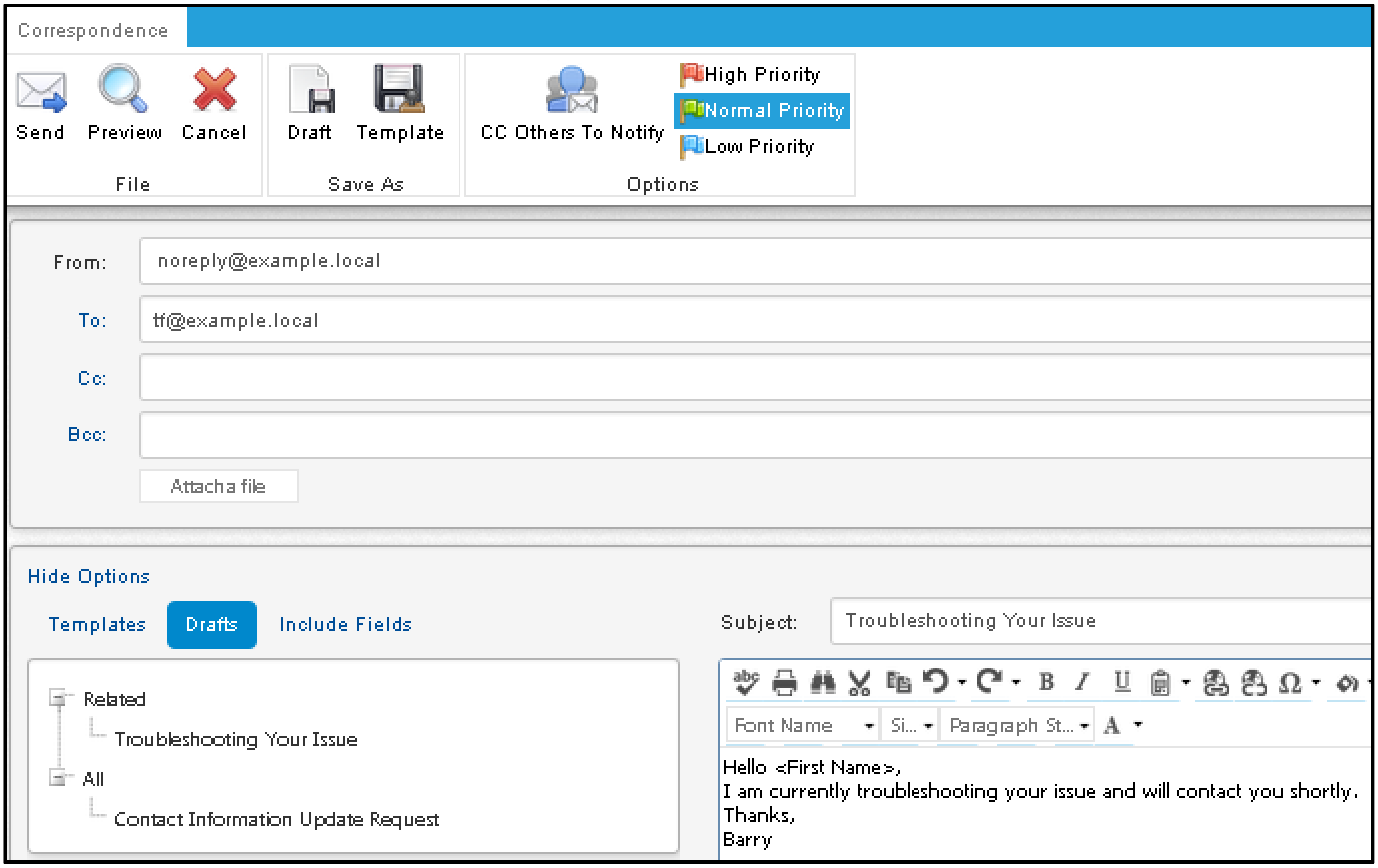


Save As Draft and Save As Personal Correspondence Template

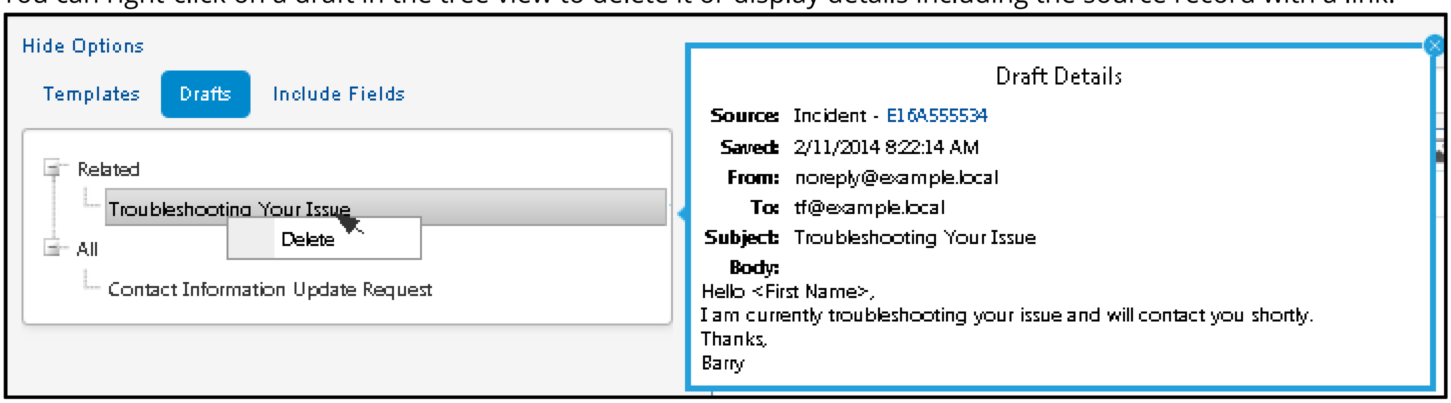
You can now save correspondence as a draft or as a template via ribbon bar icons in the Correspondence screen.



Once a draft message is sent, it will be removed from the Draft list. If the Save As | Draft ribbon icon is selected again while editing an already saved draft, the previously-saved draft will be overwritten.

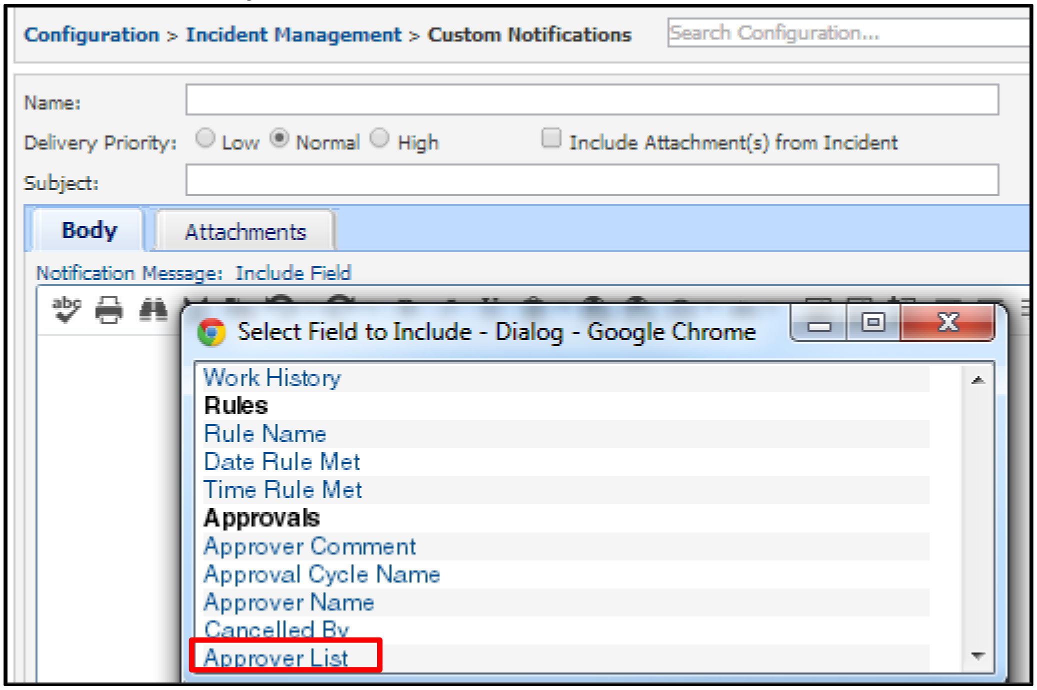


You can right-click on a draft in the tree view to delete it or display details including the source record with a link.

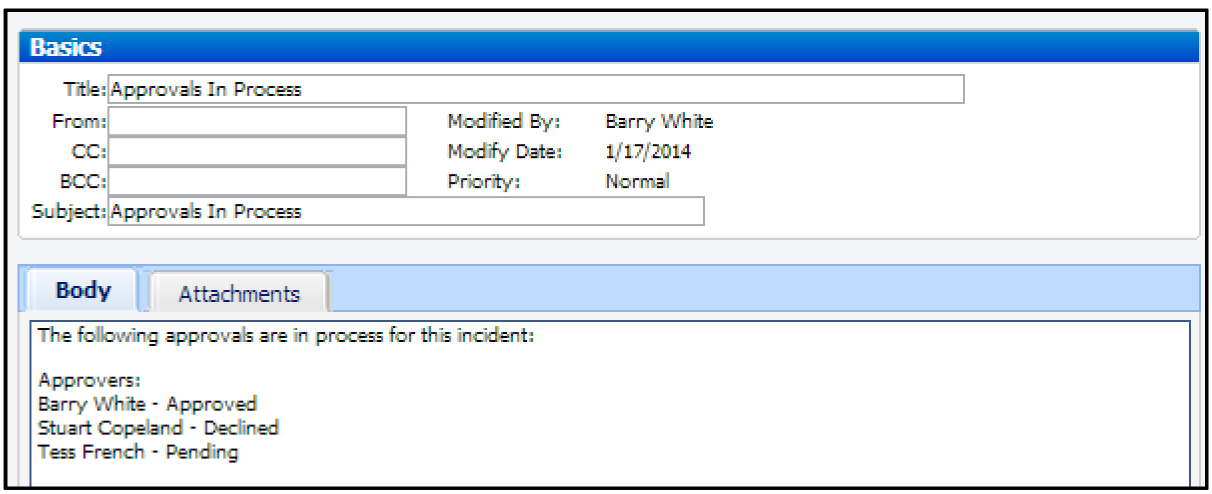


Approver List Include Field for Correspondence and Custom Notifications

An Approver List include field has been added for use in iSupport's Incident, Change, and Purchase Correspondence and Custom Notification functionality.

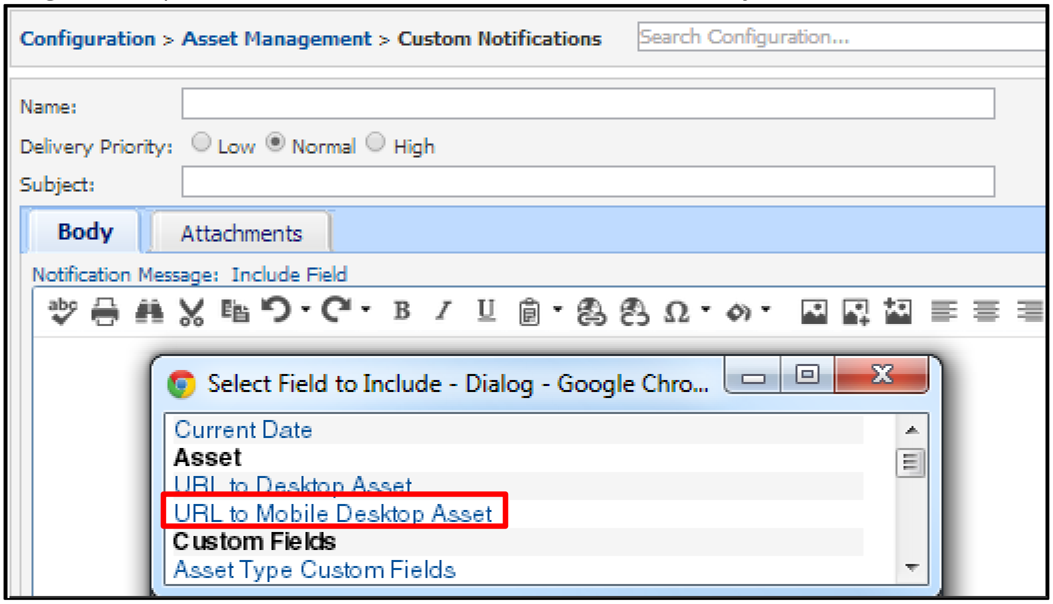


Field values will include a list of the approvers in the current approval cycle as well as any verdict specified by an approver.



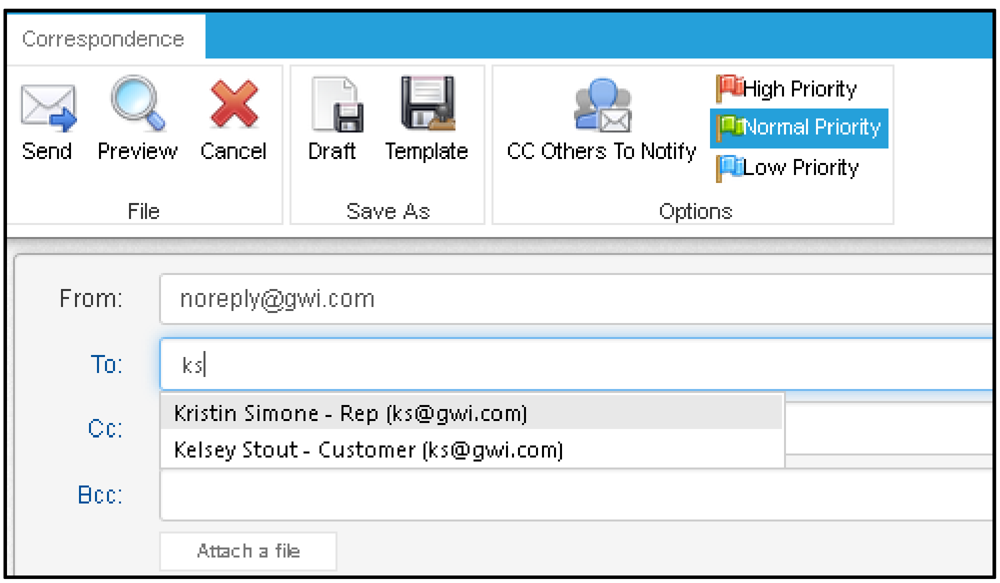
URL to Mobile Desktop Include Field for Correspondence and Custom Notifications

A URL to Mobile Desktop <*record type*> include field has been added for use in iSupport's Asset, Knowledge, Problem, and Change Correspondence and Custom Notification functionality.



Type Ahead/Autofill Email Address Searching for Correspondence Address Fields

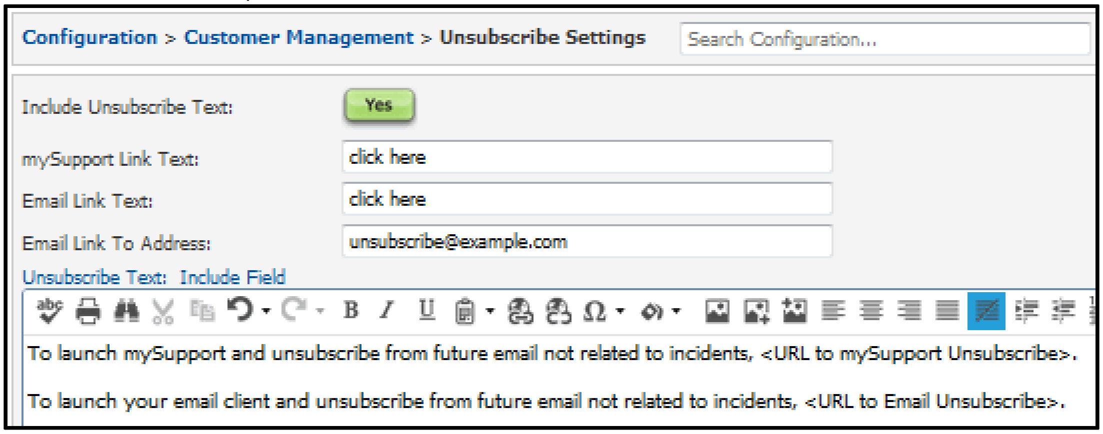
When typing in an address field in the Correspondence screen, matching names and address will appear for selection.



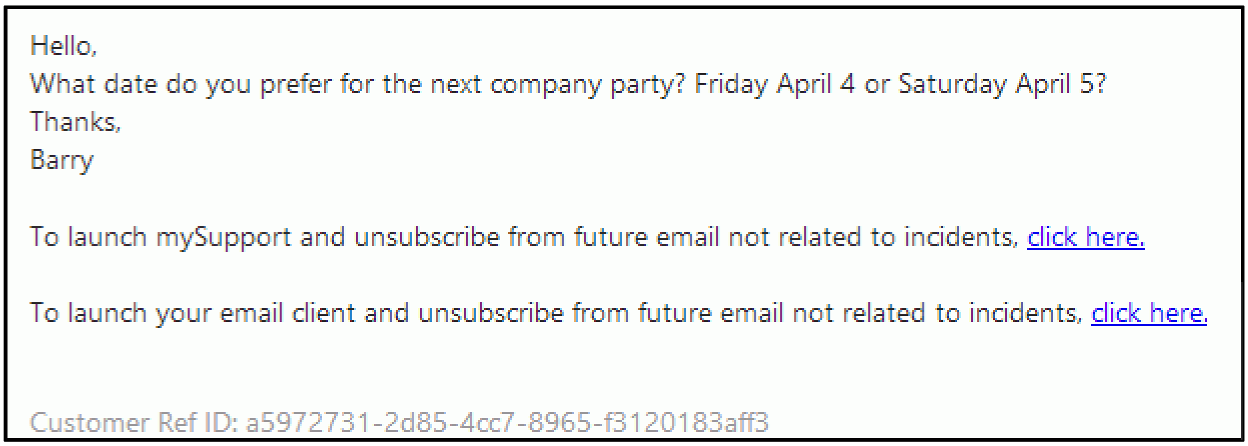
Unsubscribe Option for Customer Correspondence

You can now enable customers to unsubscribe from email sent by support representatives via the Desktop, Customer Profile, and Opportunity screens. (Note that all other iSupport notifications will still be sent.)

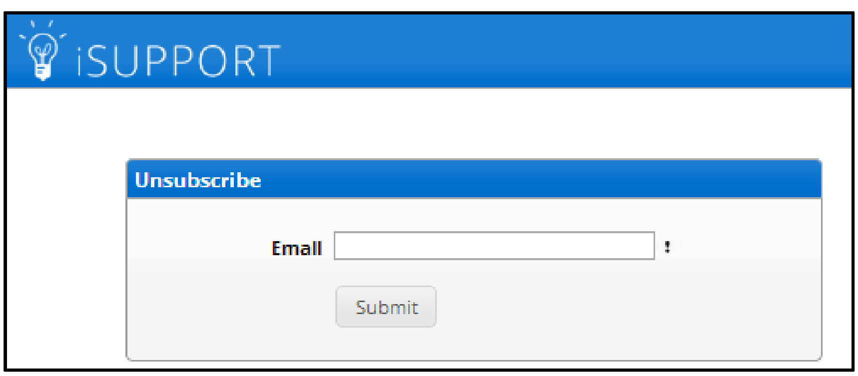
Links can be configured for launching a new email or mySupport (previously named the Social Client). Use the Customer Management | Unsubscribe Settings screen to configure link labels and text, as well as the email address to populate the To field in the response email.



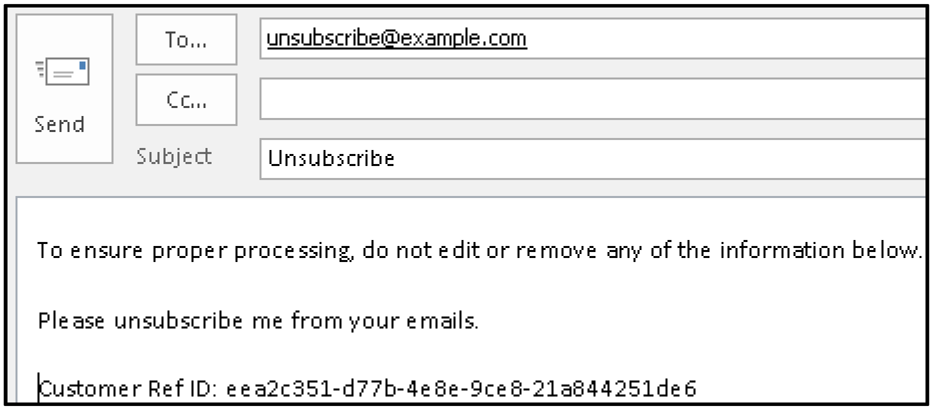
Configured links and text will be appended to outbound email correspondence. With the example above, links will appear in an email as follows:



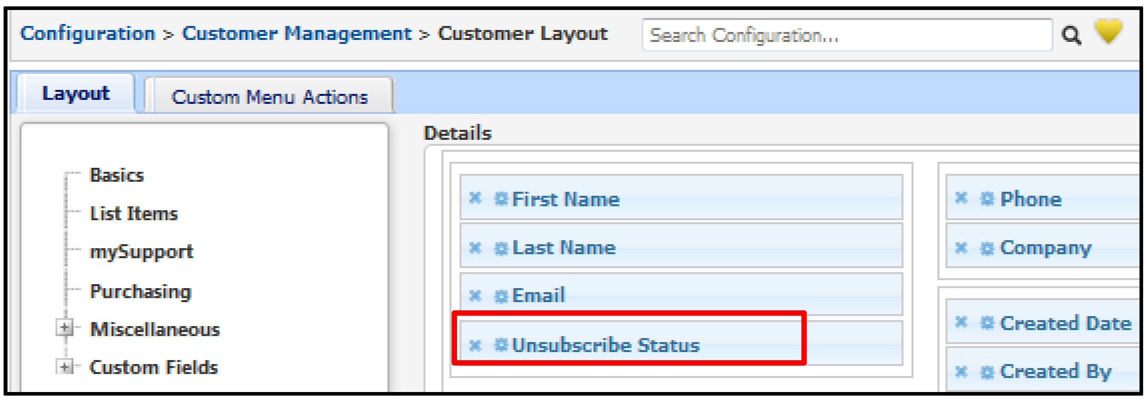
When the user clicks the link to mySupport, an Unsubscribe dialog will appear for the customer to enter their email address.



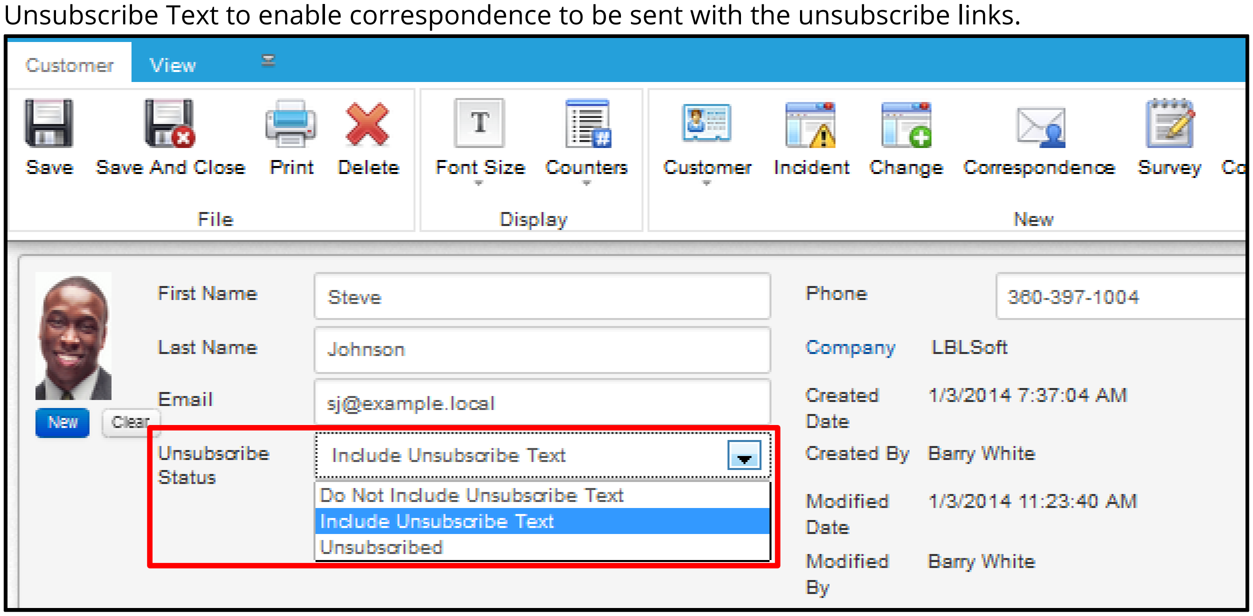
When the user clicks the email link text, his/her email client will launch and create a new email as shown in the example below. The To field will be populated with the configured Email Link To Address.



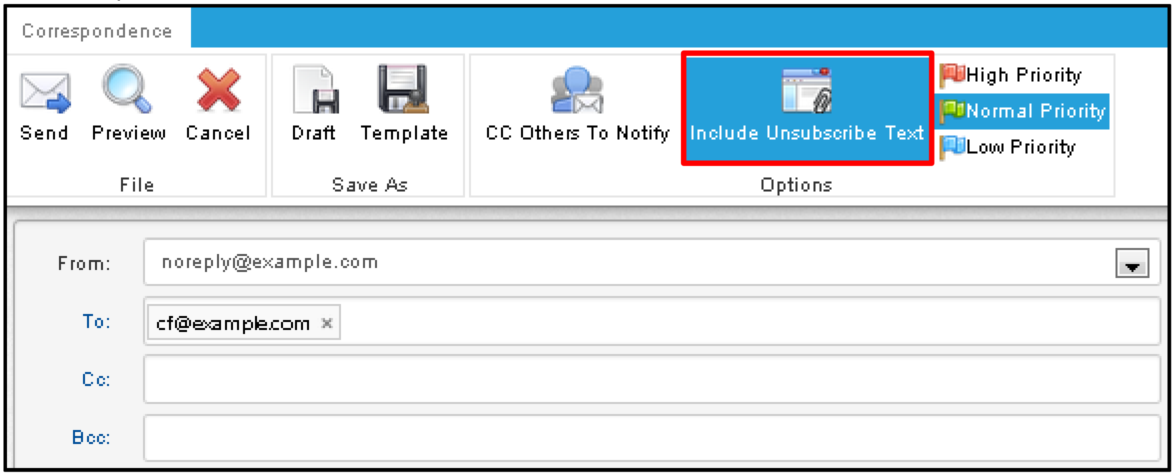
An Unsubscribe Status field has been added to the Customer Layout configuration screen in support of this functionality.



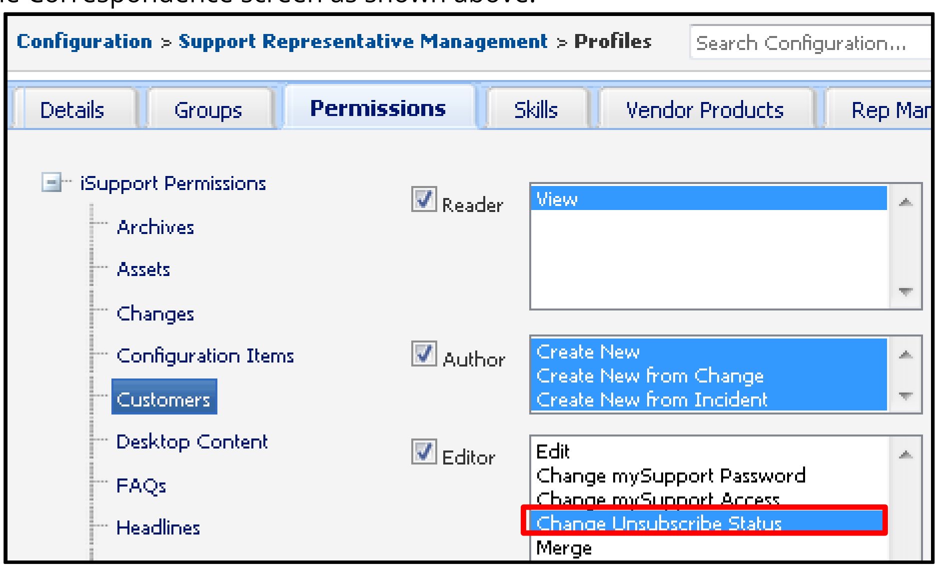
After a customer has unsubscribed, the status in the Unsubscribe Status field in the Customer Profile screen will change to Unsubscribed. Support representatives with the Change Unsubscribe Status permission can change this status to Do Not Include Unsubscribe Text to enable correspondence to be sent without the configured links, or Include Unsubscribe Text to enable correspondence to be sent with the unsubscribe links.



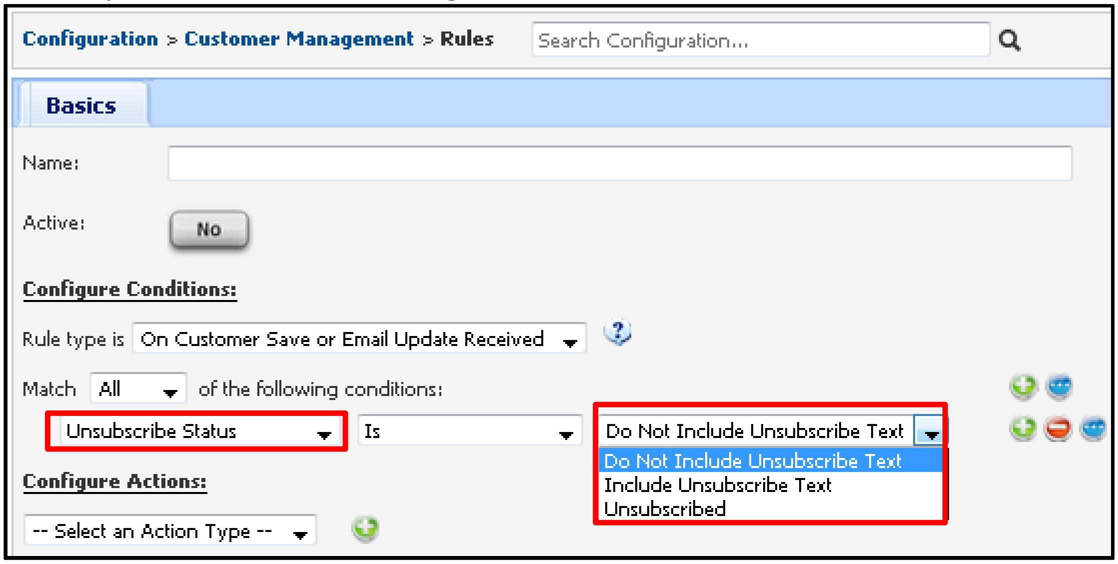
Support representatives with the Change Unsubscribe Status permission can use the Include Unsubscribe Text option in the Correspondence menu to override the Do Not Include Unsubscribe Text status.



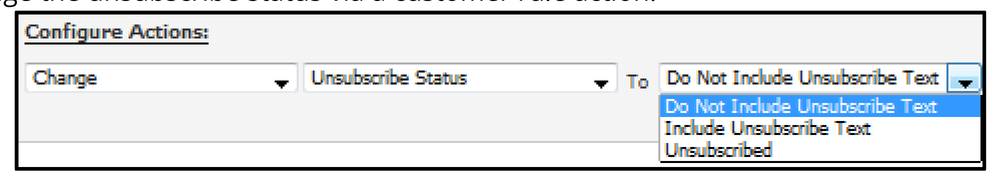
Use the Change Unsubscribe Status permission in the Support Representative Profile screen or the Support Representative Group screen to control a support representative's ability to change a customer's unsubscribe status. If a support representative does not have this permission, the Correspondence menu option will be disabled in the Customer Profile and Opportunity screens and the support representative will not be able to send correspondence to unsubscribed customers via the Desktop. If a support representative has this permission, the prompt "Customer has unsubscribed from correspondence. Click Continue to proceed." will appear when a correspondence is initiated for a customer with an Unsubscribed status, and the Include Unsubscribe Text option will be included in the Correspondence screen as shown above.



You can use the Add Unsubscribe Status condition in a Customer Management rule to perform an action such as changing a customer profile field value or sending a notification based on the unsubscribe status.



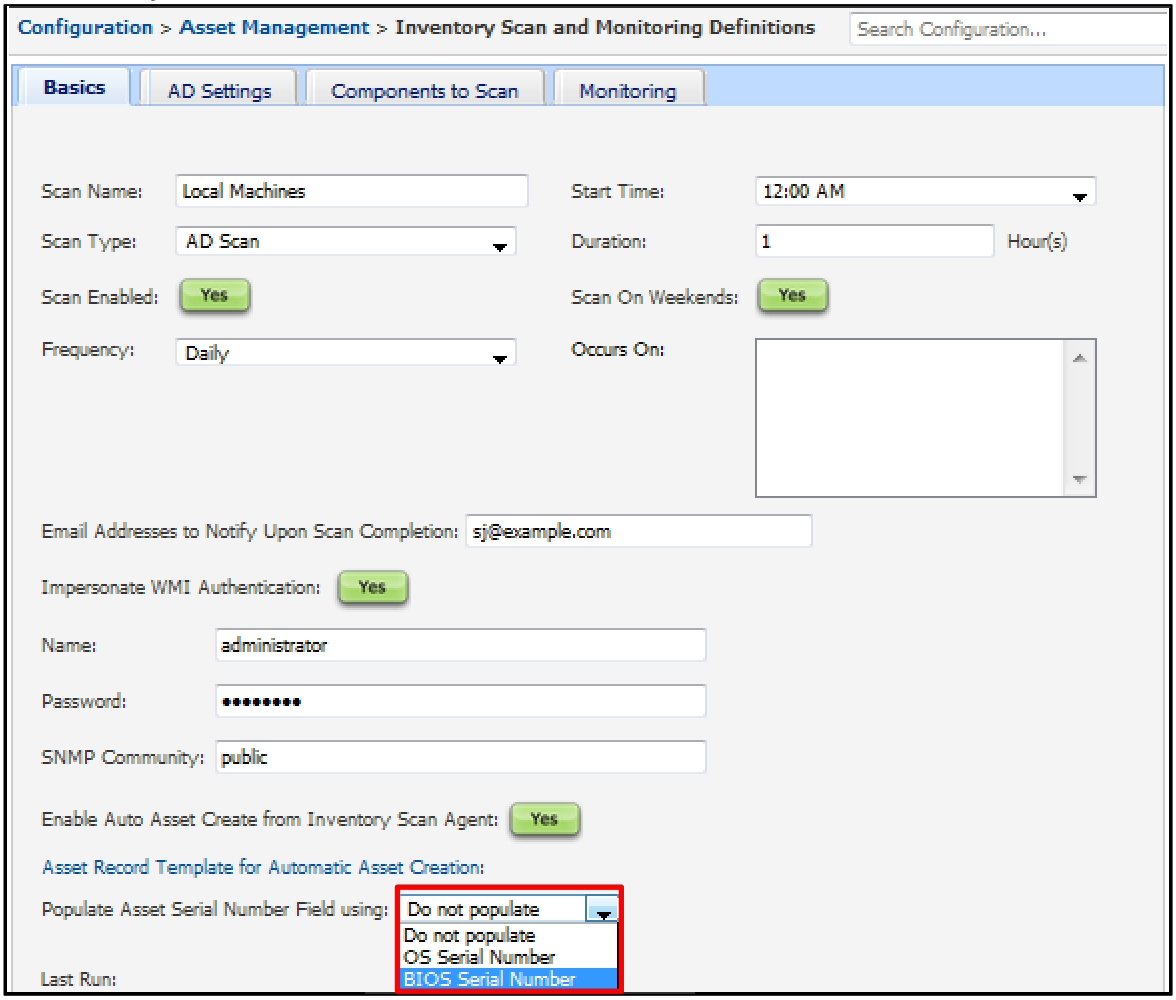
You can also change the unsubscribe status via a customer rule action.



Asset Scanning and Monitoring

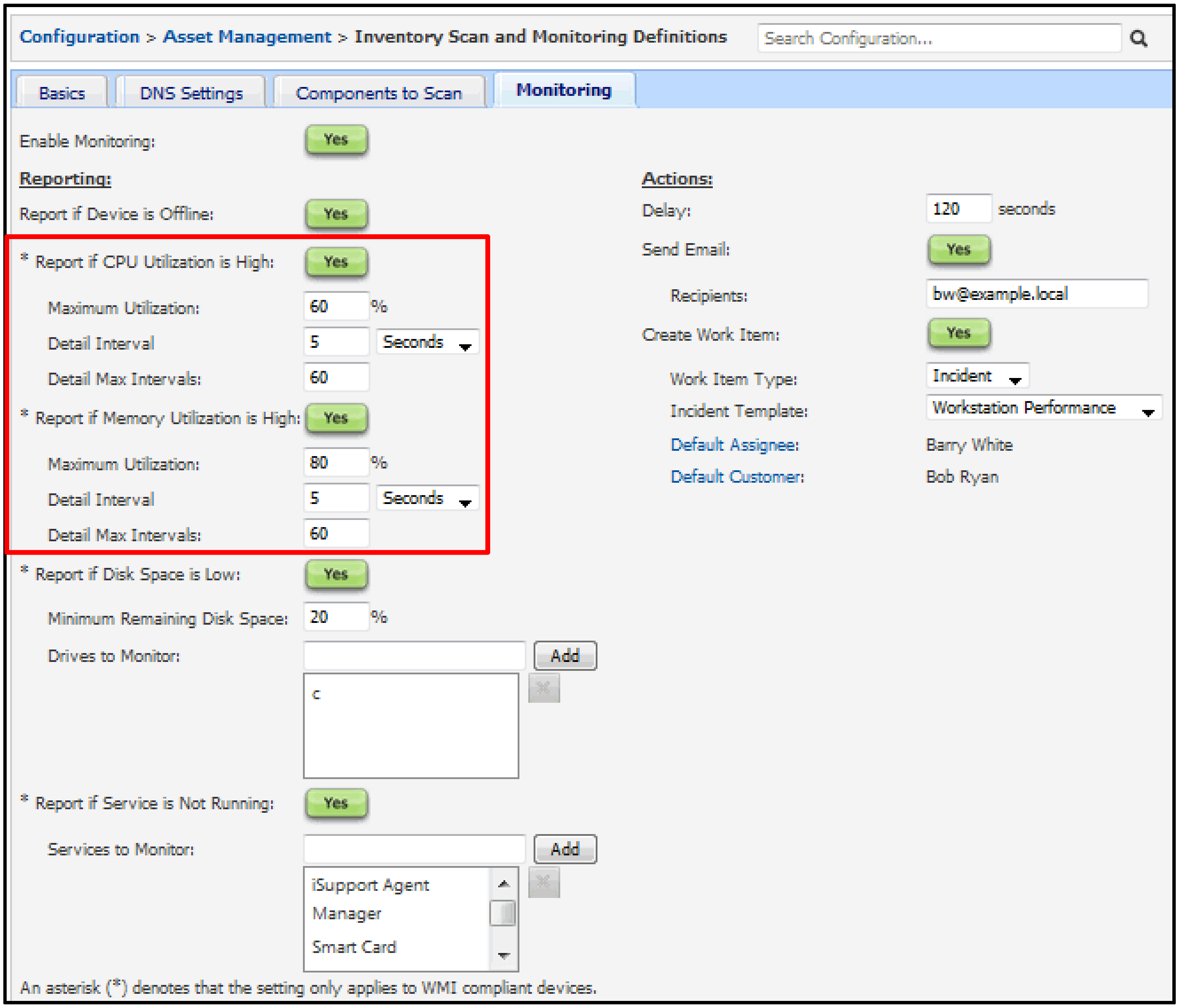
System BIOS for Inventory Scan Sync Key When Available

When creating a new asset record from an inventory scan, the BIOS serial number will be used as the unique identifier for the asset to scan association. If the BIOS serial number is not available, the machine name or ID defined in the inventory scan definition will be used.

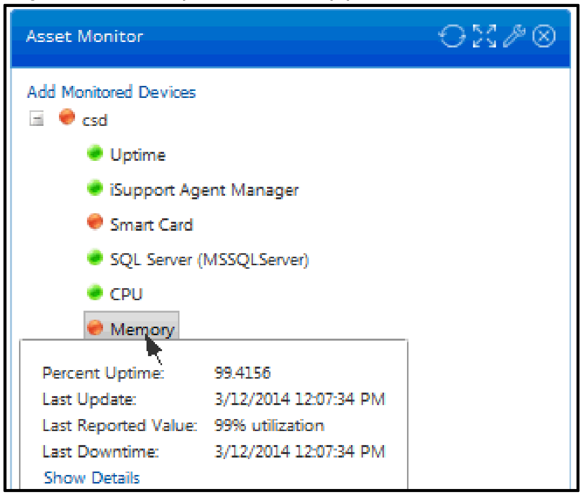


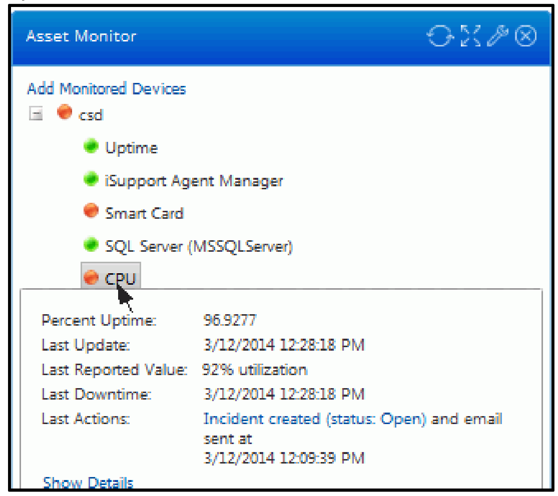
Memory and CPU Utilization Added to Monitoring

You can now monitor memory and CPU utilization using the Report if CPU Utilization is High and Report if Memory Utilization is High fields on the Monitoring tab in the Asset Management | Inventory Scan and Monitoring Definitions configuration screen. You can configure the maximum percentage of utilization at which reporting will start, as well as the duration and frequency of occurrences to track. In the example below, if CPU utilization reaches 61%, CPU utilization will be recorded for a duration of 5 seconds for a maximum of 60 times.

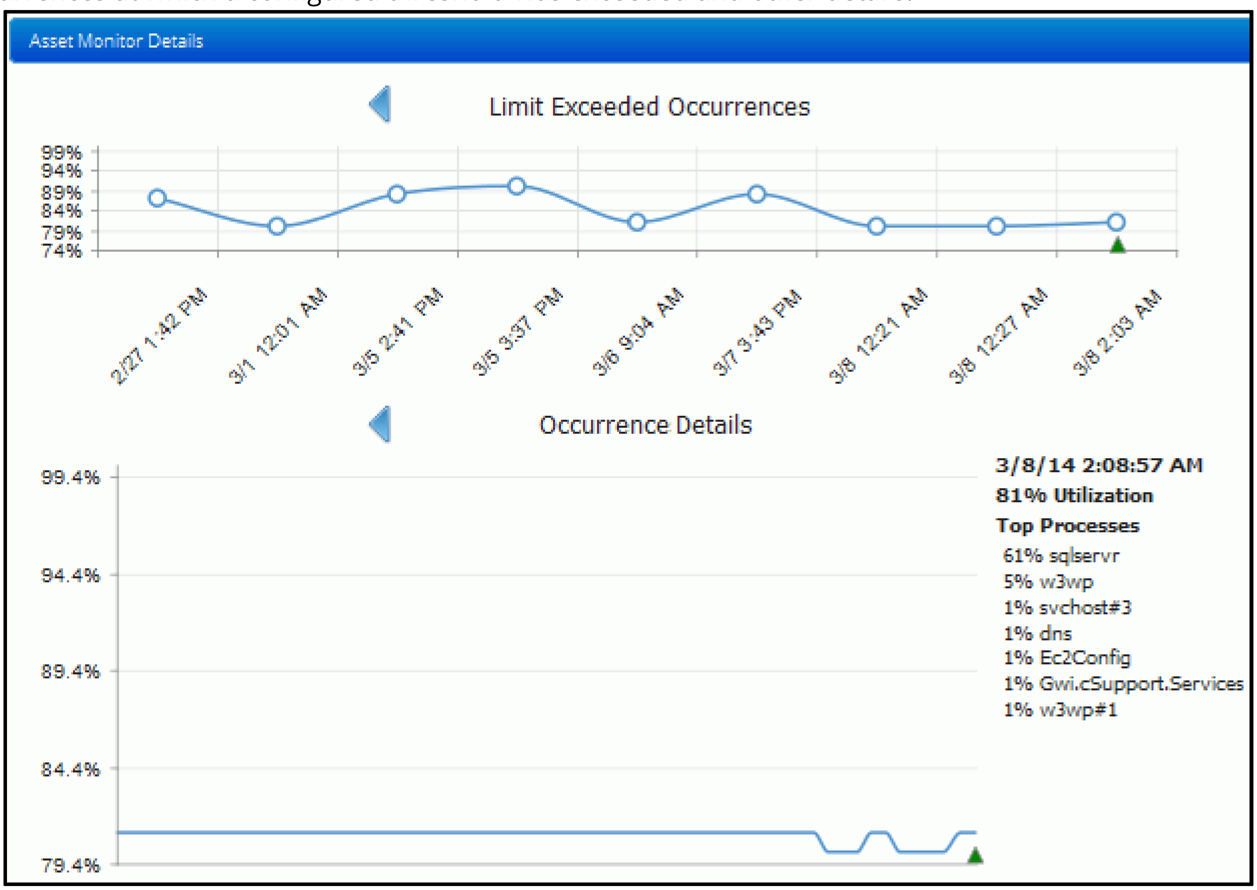


The Memory and CPU options will appear as shown in the example below:

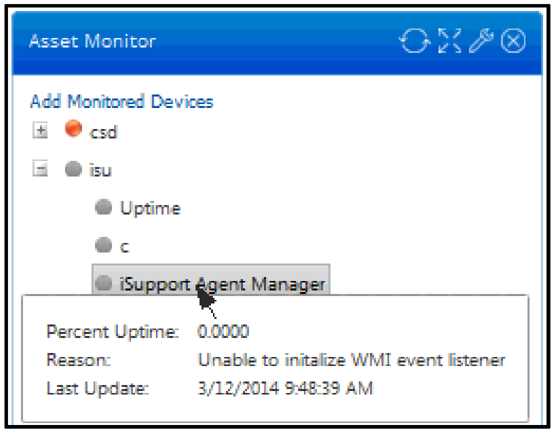




The Show Details link will appear in the tooltip if a configured threshold was exceeded; click it to display a chart of the occurrences at which a configured threshold was exceeded and other details:



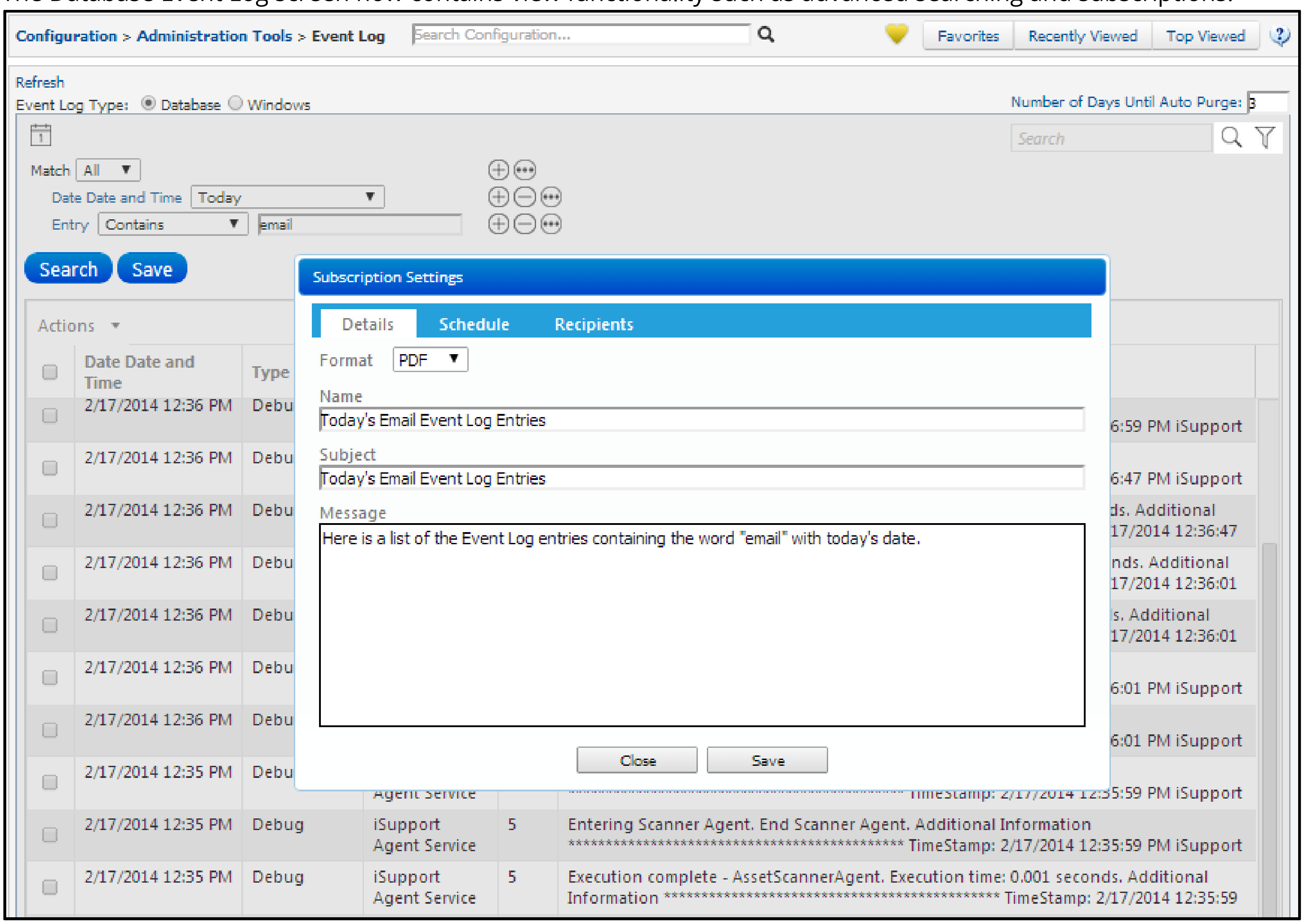
A gray dot will appear if you set up asset monitoring for a device on which the WMI listeners cannot be started (for example, if an error occurred with permissions).



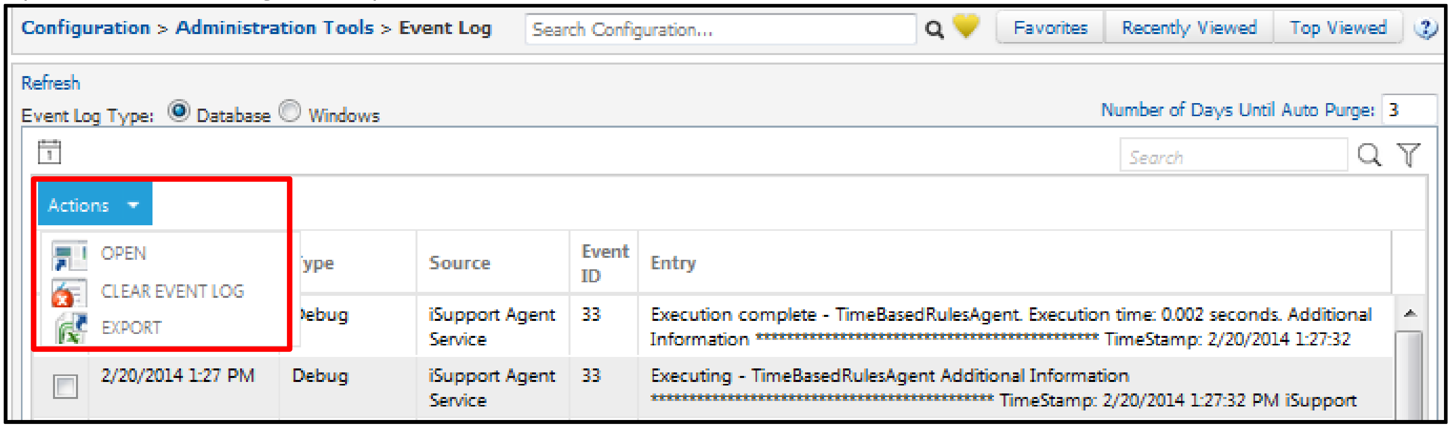
Note that if monitoring has been disabled for a device, the entry will now be removed from the component.

Event Log View Enhancements

The Database Event Log screen now contains view functionality such as advanced searching and subscriptions.



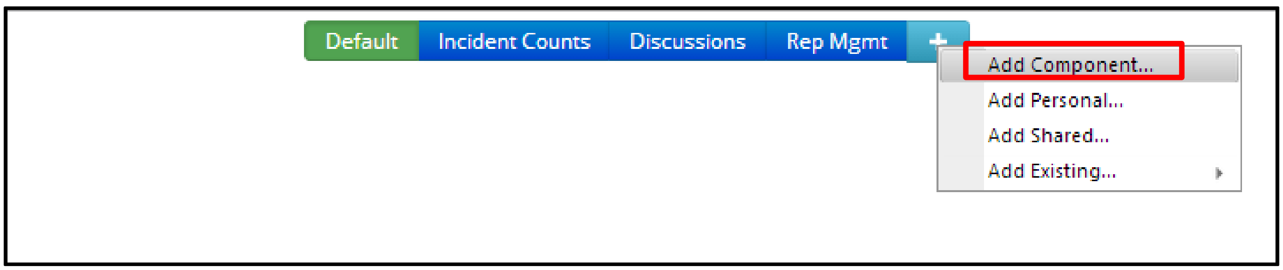
Open, Clear Event Log, and Export view actions are also included.



Desktop Components

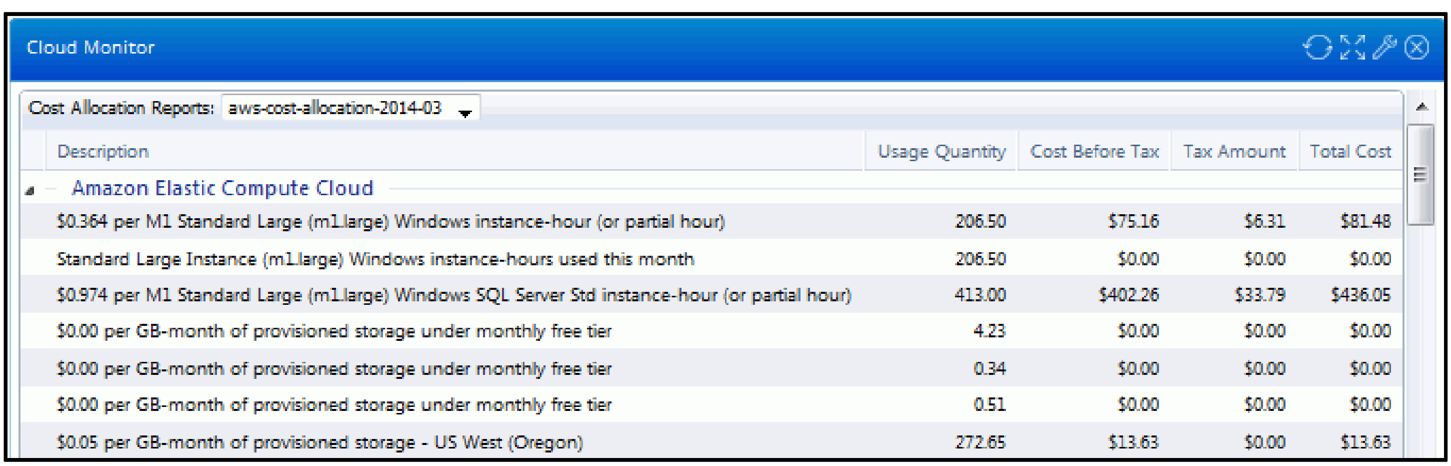
Add Component Function Moved to Dashboard Menu

The Add Component **+ Components** function on the iSupport Desktop has moved to the dashboard menu accessed via the Add Dashboard or Component **+** icon at the top of the Desktop.

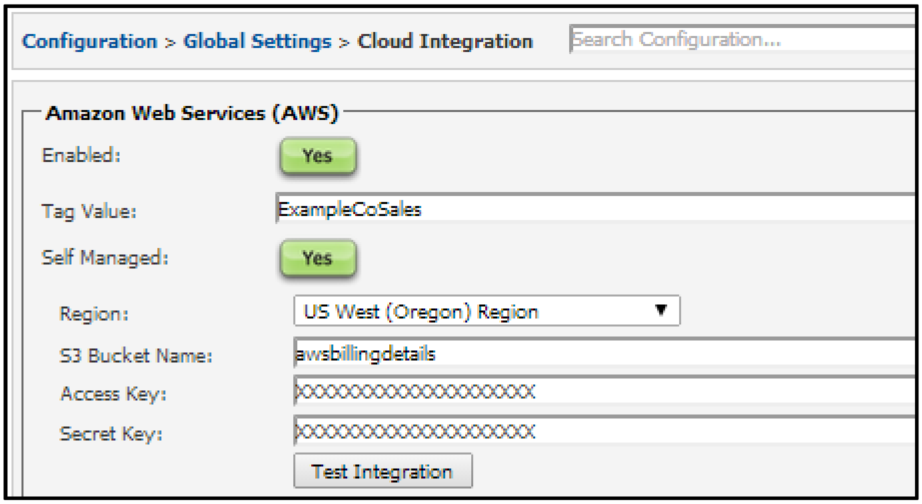


Cloud Monitor Component

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

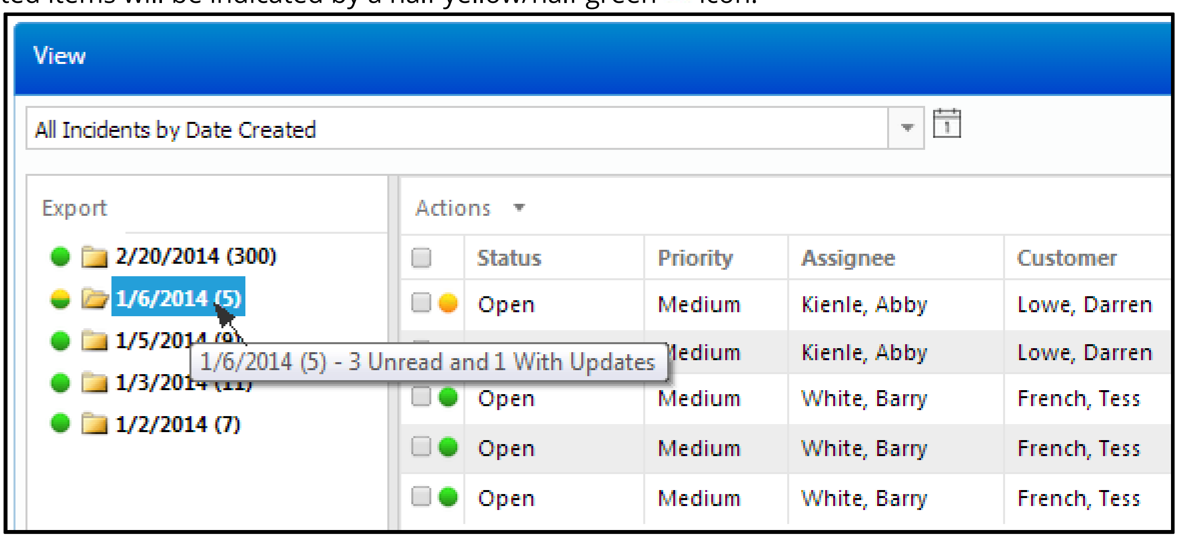


AWS uses tag keys to label and organize costs for the report; if iSupport is managing your AWS data, iSupport will provide the tag value for you to enter in the Global Settings | Cloud Integration screen. If you are managing your AWS data, you'll need to configure access to the report via the AWS account settings and Amazon Elastic Compute Cloud (EC2) web service interface that works in conjunction with Amazon Simple Storage Service (Amazon S3). You'll then complete the fields in the Global Settings | Cloud Integration screen using configured values. Contact iSupport for instructions.

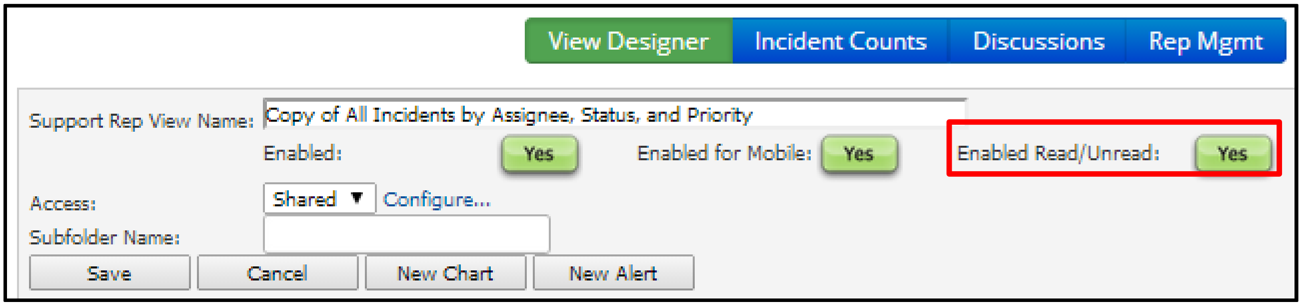


Read/Unread/Updated Indicators for Views

You can now enable unread and read/updated indicators on incident, problem, change, and purchase views. The indicator will disappear if you have read an item or all items in a folder. A folder with both unread and read/updated items will be indicated by a half yellow/half green icon.



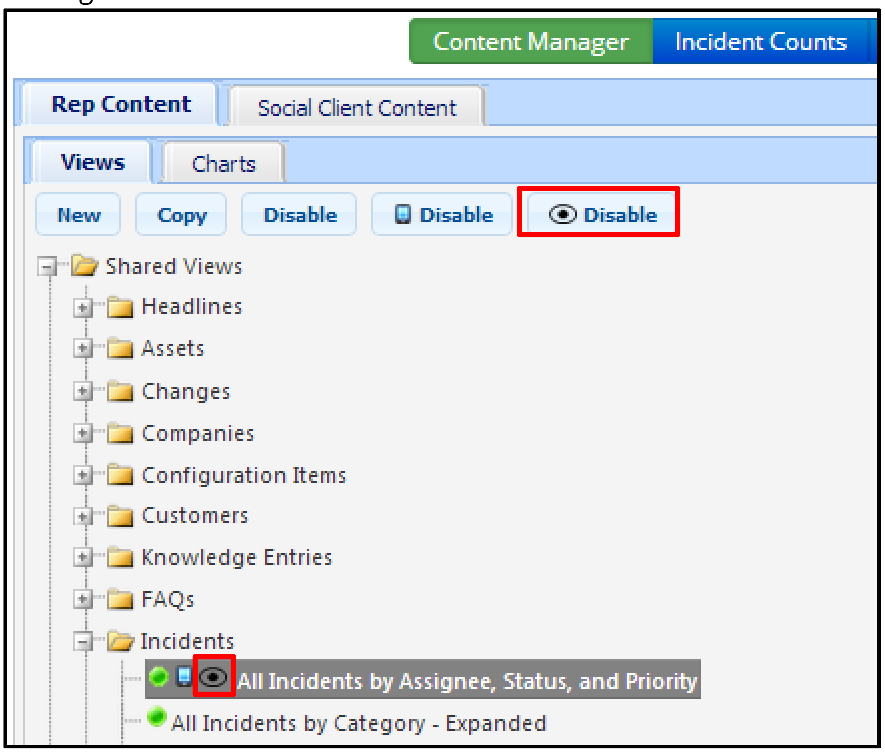
You can enable read/unread indicators for a custom view via the Enabled Read/Unread button in the View Designer.



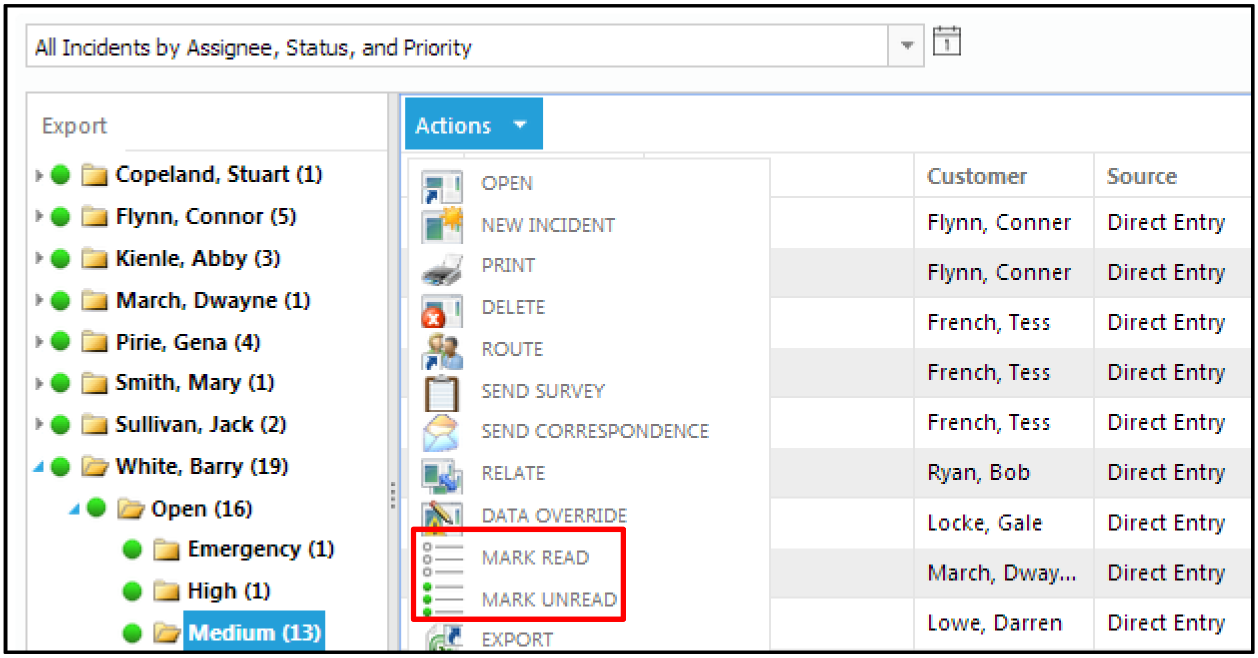
To enable or disable read/unread indicator for a default view, use the Enable 

and Disable 

buttons in the Content Manager.



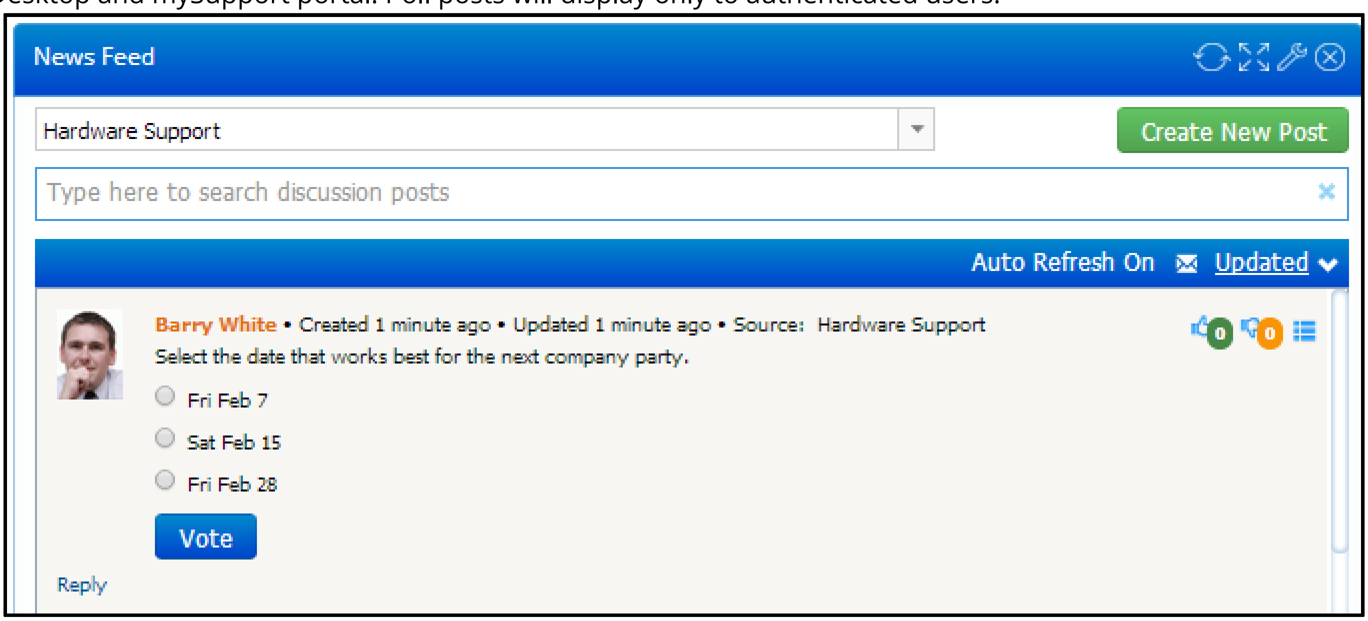
If read/unread indicators are enabled, you can use the Mark Read and Mark Unread options in the View component Actions menu.



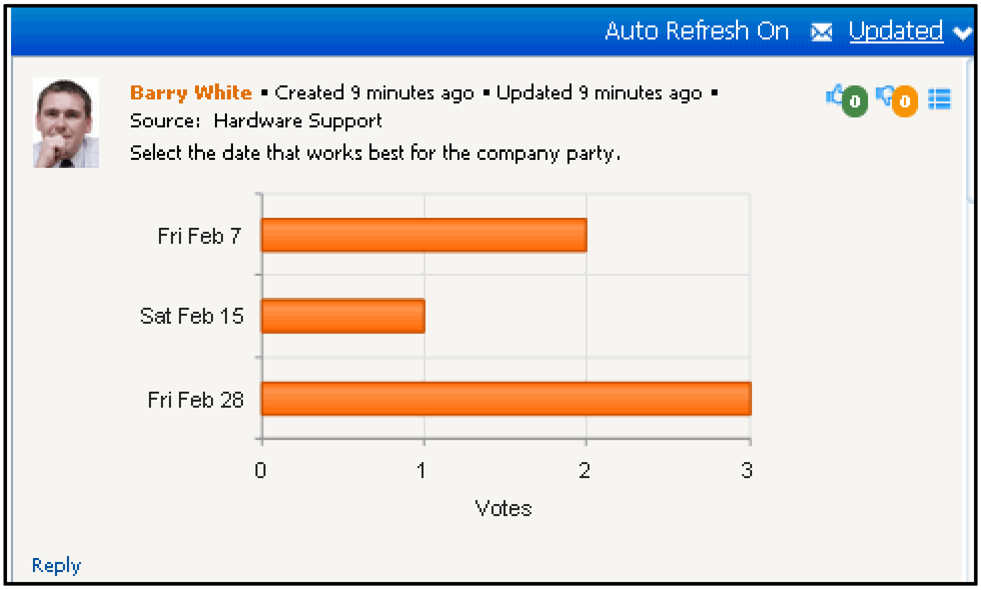
Discussion News Feed Enhancements

Polling

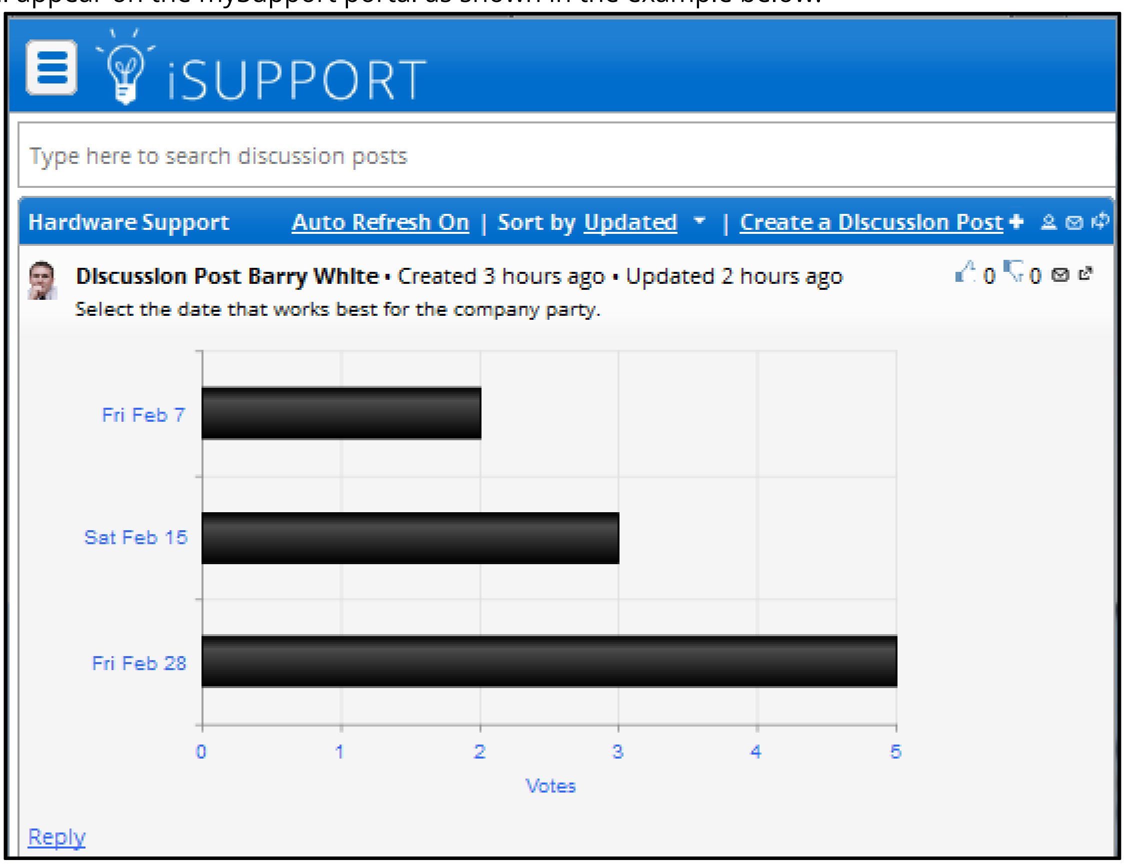
You can now create a poll-type post with radio button response options in discussion-only news feeds on the Desktop and mySupport portal. Poll posts will display only to authenticated users.



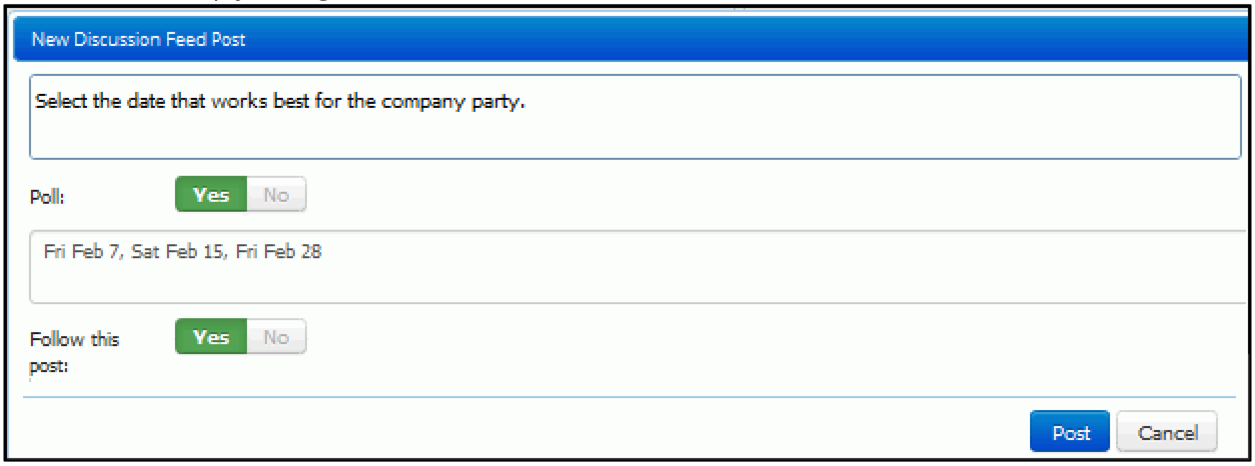
After a user selects a response, results will appear in a graph:



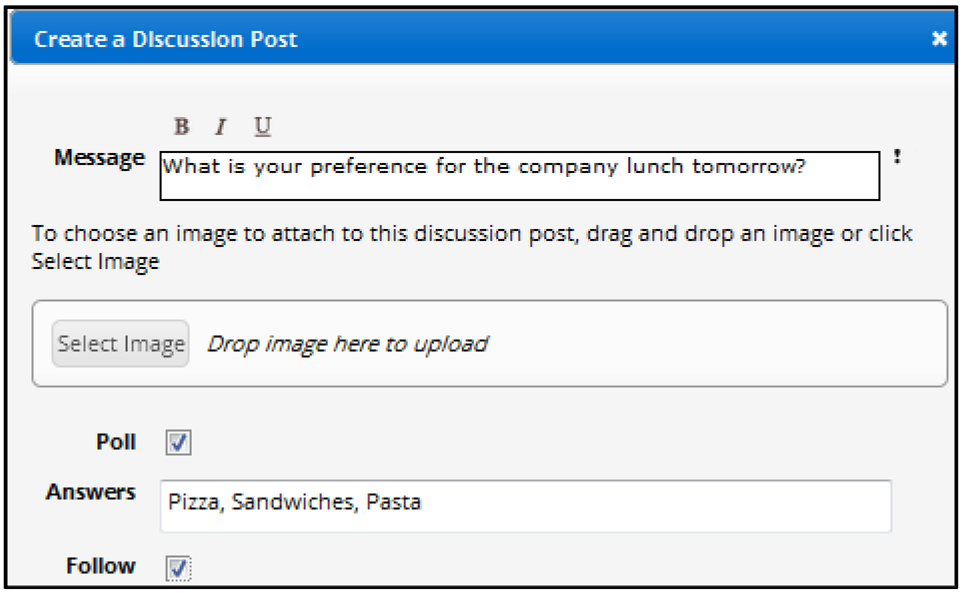
Poll posts will appear on the mySupport portal as shown in the example below:



To create a poll post, select Yes in the **Poll** field in the New Discussion Feed Post dialog and enter answer options in the area below the post, separating each with a comma. Note that a **Follow This Post** option is now included in this dialog; it is also in the Reply dialog.

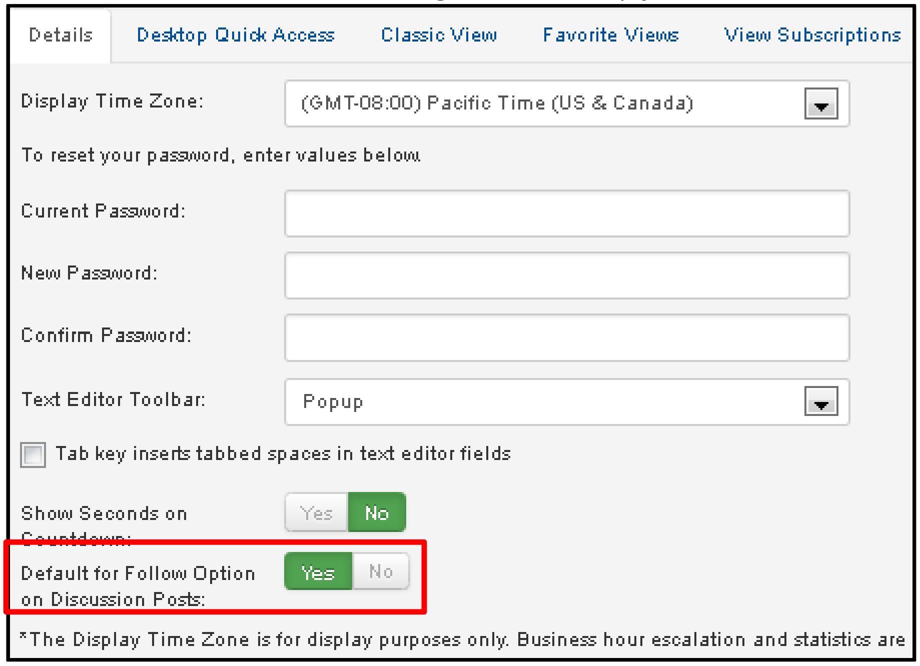


Poll posts can also be created via the mySupport portal.



Default for Following Posts

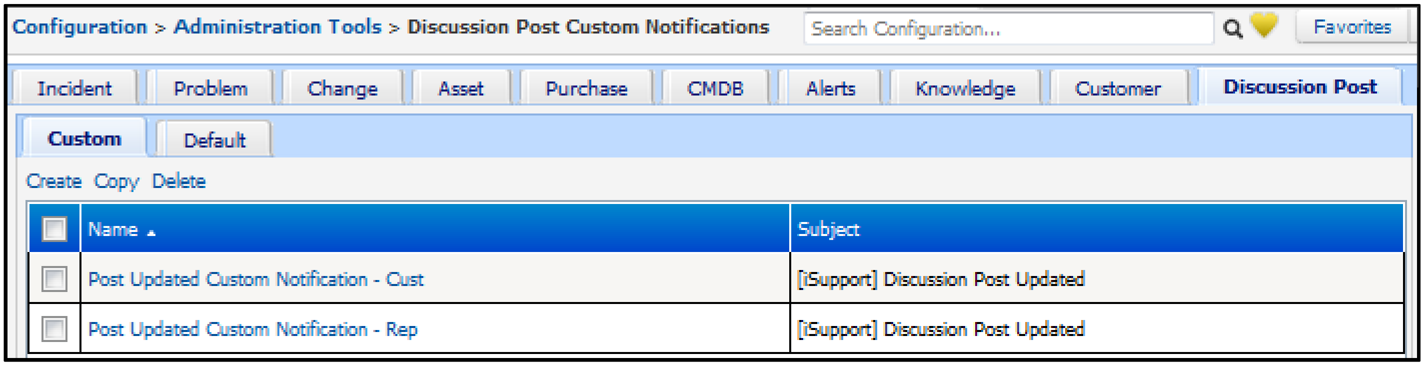
A Default for Follow Option on Discussion Posts field is now included in Desktop Preferences for setting a default for the Follow option in the Create Discussion Post dialog and in the Reply field on a discussion feed.



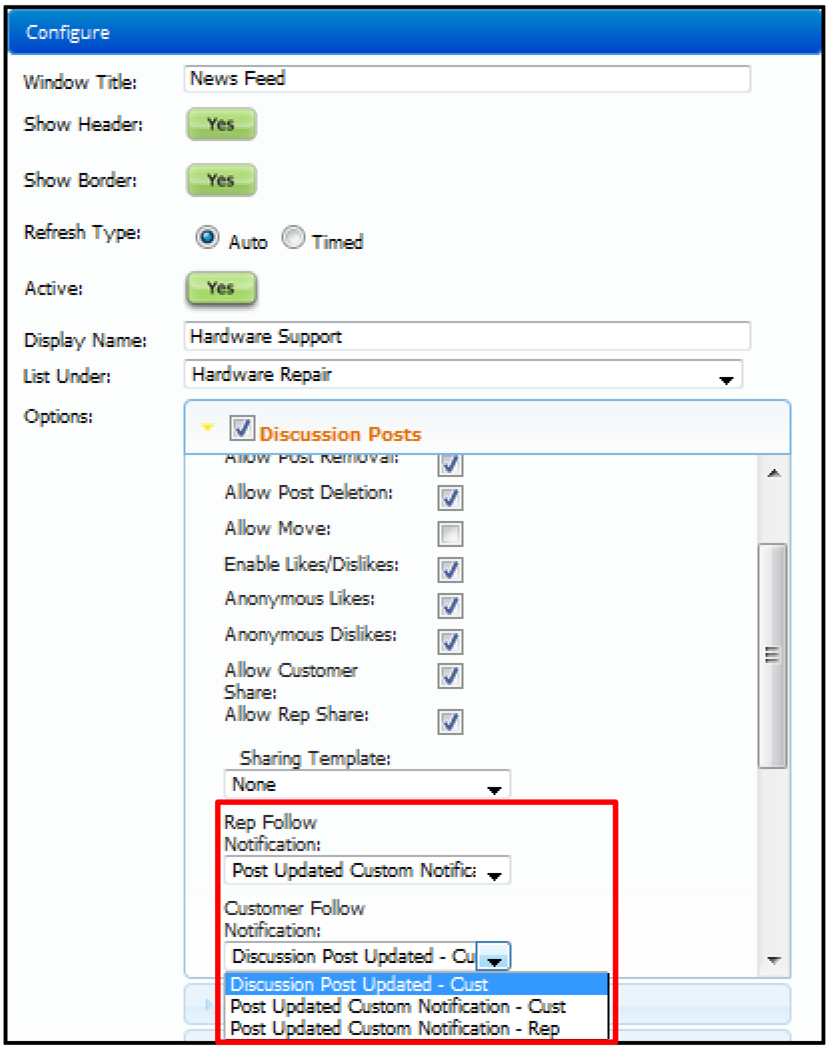
On the mySupport portal, a user's first discussion post or reply will determine the default for the Follow option in the Create Discussion Post dialog and the following reminder will appear. The default can be changed in Account Settings.

Custom Follow Notifications

You can now use the Custom Notification screen to customize the notification sent when you are following a discussion post and the post is updated.

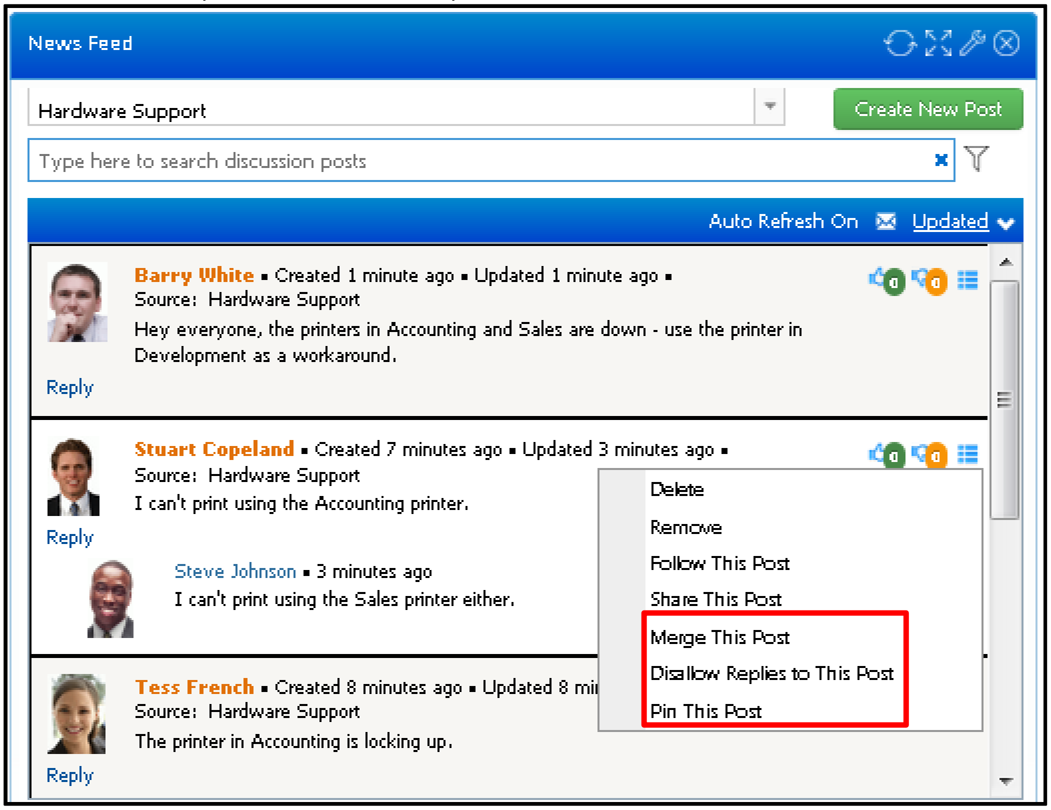


Select follow notifications for support representatives and customers via the Rep Follow Notification and Customer Follow Notification fields in the News Feed configuration dialog.

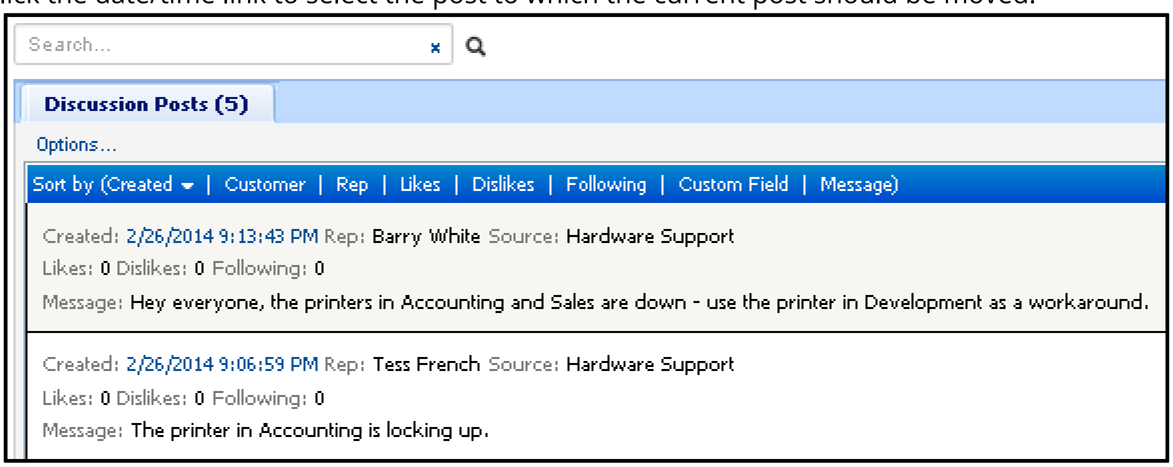


Merging, Preventing Post Replies, and Pinning Posts
Three new functions have been added to the discussion post action menu: Merge This Post. Disallow Replies to This Post, and Pin This Post.

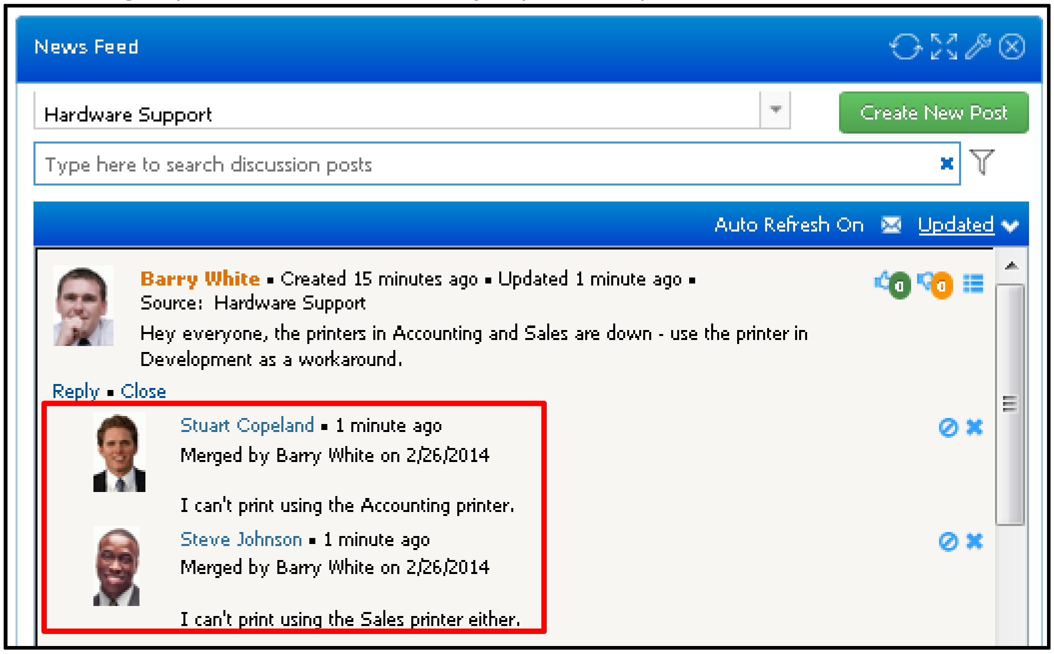
- Disallow Replies to This Post will prevent the Reply link from appearing on a post.
- Merge This Post will move a post under another post.



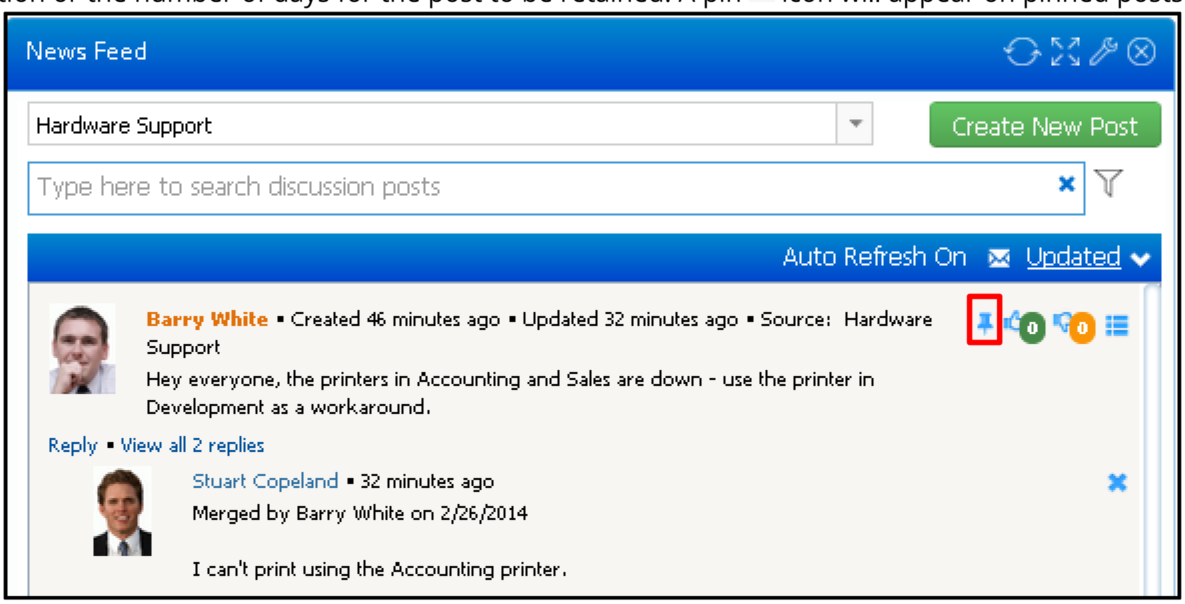
After selecting Merge This Post on the post action menu, a search dialog will appear with other posts in the feed. Click the date/time link to select the post to which the current post should be moved.



An example of a merged post is shown below. Any replies to a post are also moved.

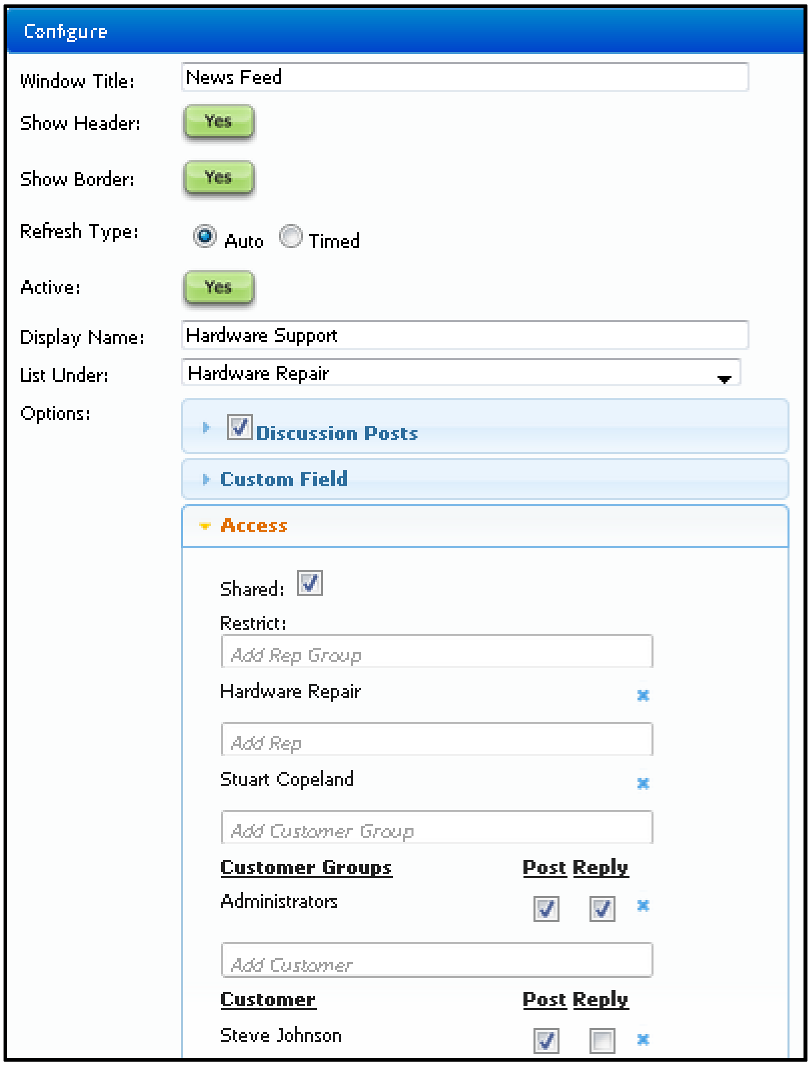


- The Pin This Post option appears on the discussion post action menu if you are designated as a Discussion Administrator in your support representative profile; this option retains the post at the top of the feed for you and others viewing the feed. After selecting this option, a Pin Expiration dialog will appear for you to specify no expiration or the number of days for the post to be retained. A pin icon will appear on pinned posts.



Post and Reply Access Control for Customers and Customer Groups

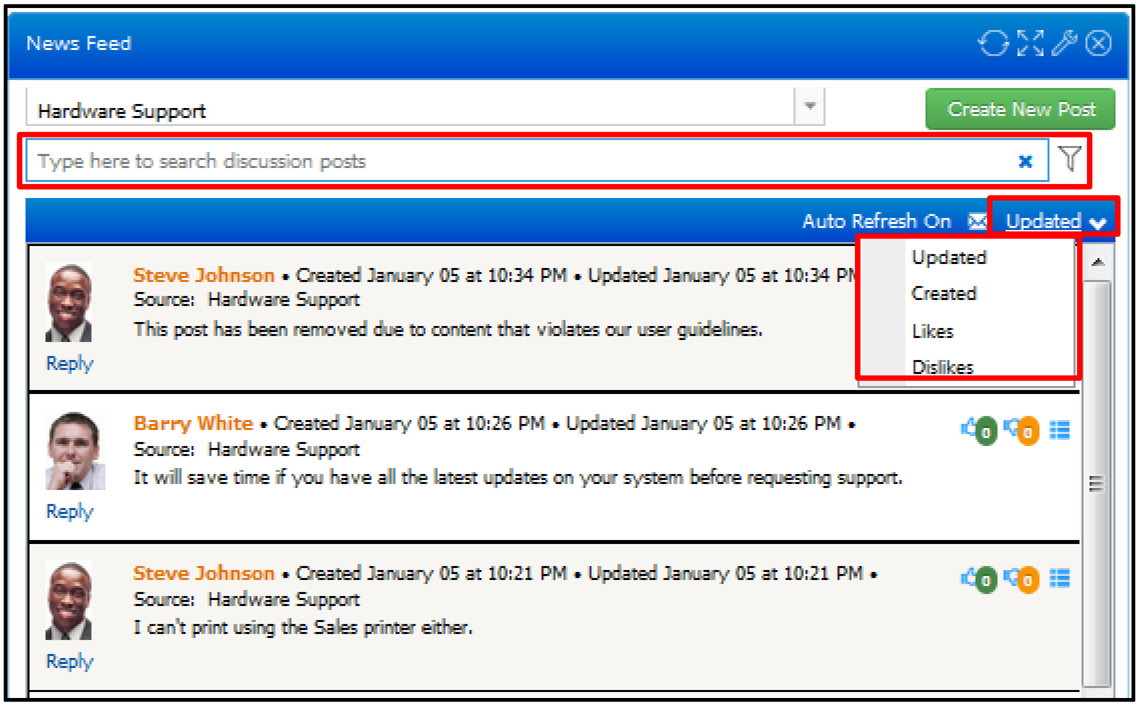
For discussion-only feeds, you can now control access to post and reply creation for customers and customer groups. In the Options | Access section in the Discussion Feed Configure dialog, use the Post checkbox to enable the Create Discussion Post link for a customer or customer group, and the Reply checkbox to enable the Reply link for a customer or customer group. Clear both checkboxes to restrict a customer or customer group to view-only access for a feed.



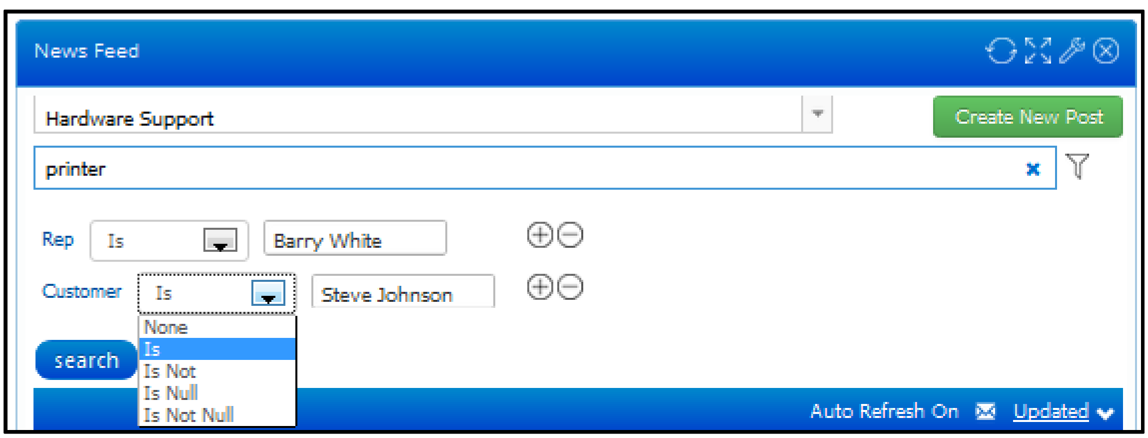
Sorting, Searching, and Customer Profile Click-Through

You can now do the following on discussion-only feeds:

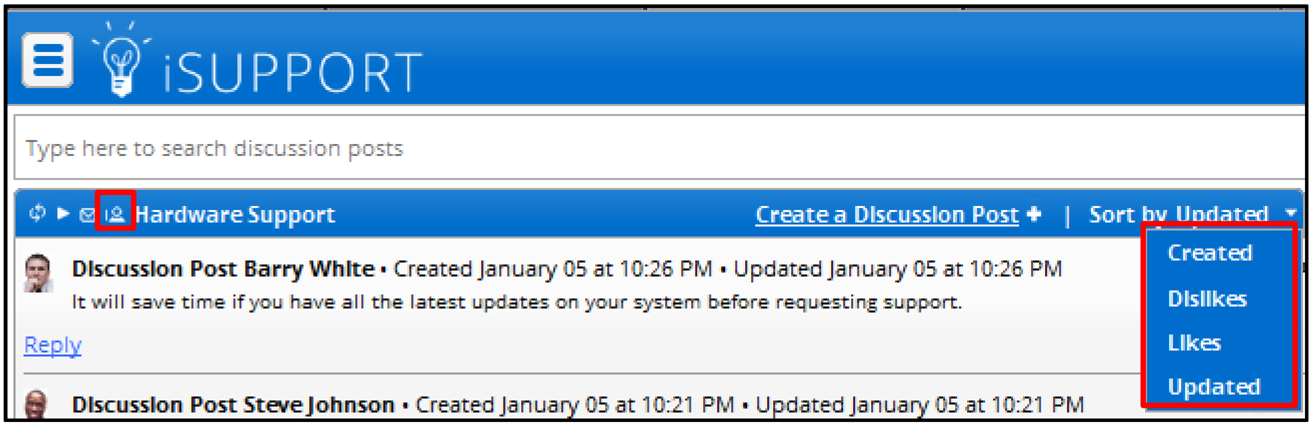
- Sort by last updated date/time, creation date/time, number of likes, and number of dislikes. The creation date and time for originating posts is now included.
- Perform a search



You can perform a literal (but not case sensitive) search for a character string within all posts in a discussion feed; click the Filter icon to refine the search by support representative or customer. Use the Add Condition and Remove Condition icons to add or remove search filters.



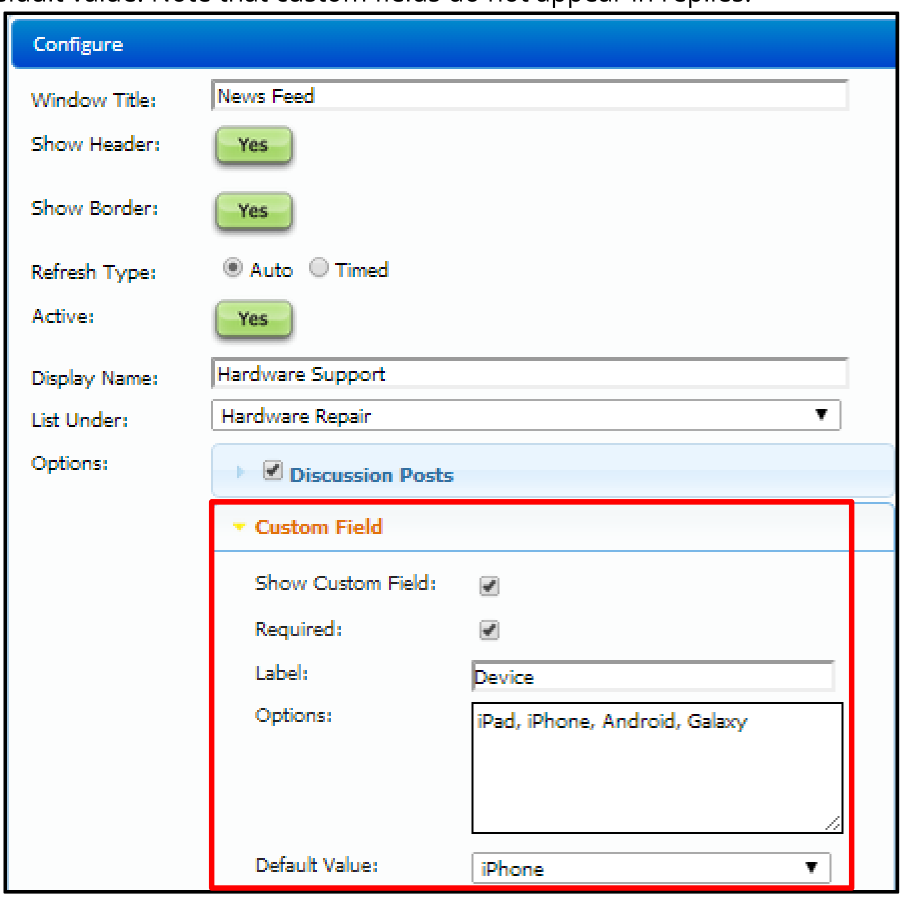
Searching is also available on the mySupport portal, however, filtering is not available. Customers can sort feed entries by last updated date/time, creation date/time, number of likes, and number of dislikes as well. A View My Posts Only option was added.



- For discussion feeds on the Desktop, you can click on a customer's avatar or name to open the Customer Profile record.

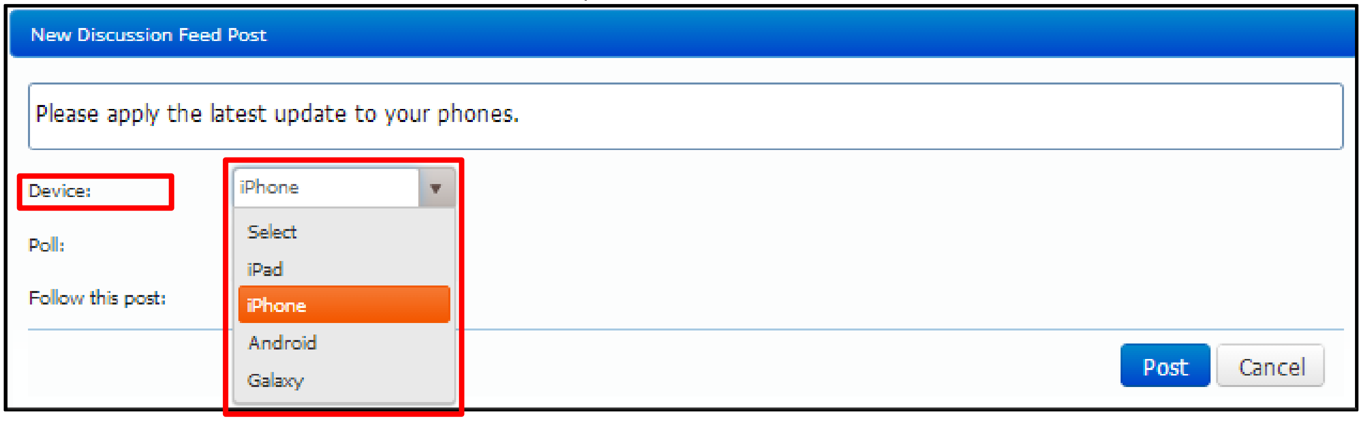
Custom Fields

You can now add a custom field to posts in a discussion-only news feed. You can make it required, enter options for selection, and set a default value. Note that custom fields do not appear in replies.

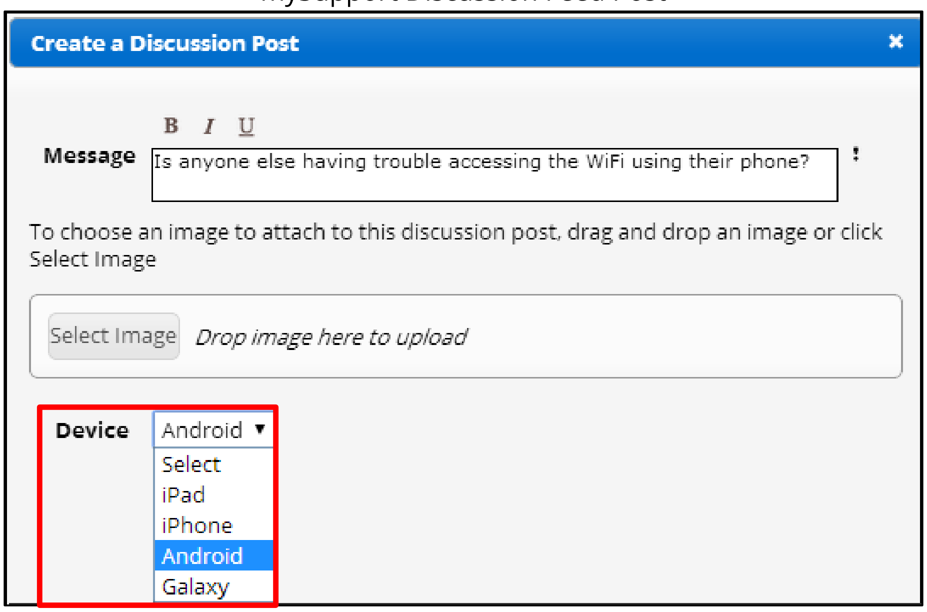


Support representatives and customers can select a value for the custom field while creating a new post.

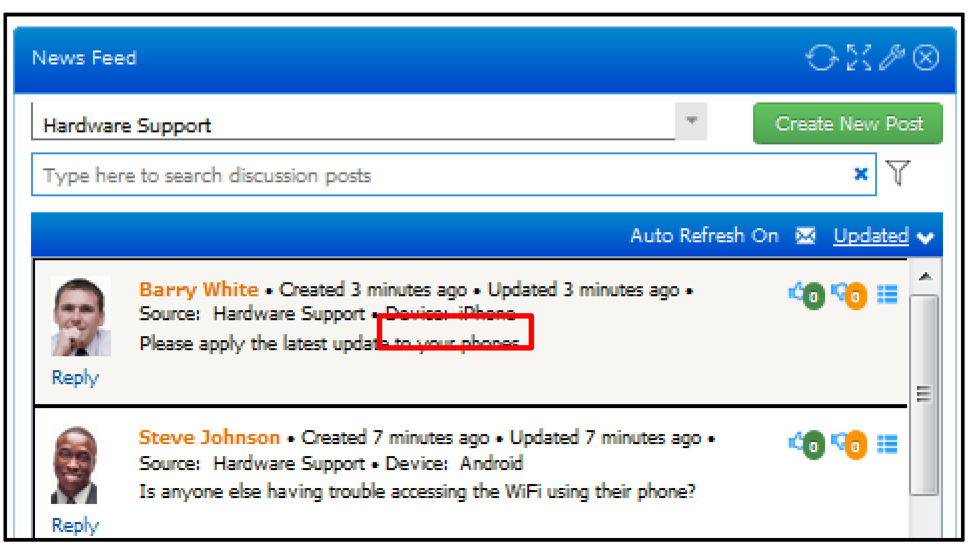
Desktop Discussion Feed Post



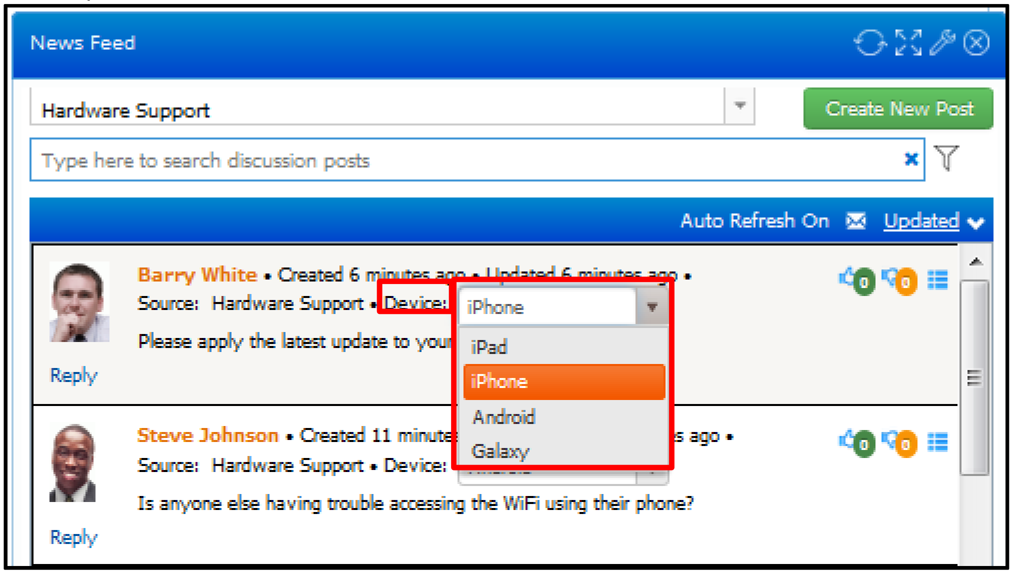
mySupport Discussion Feed Post



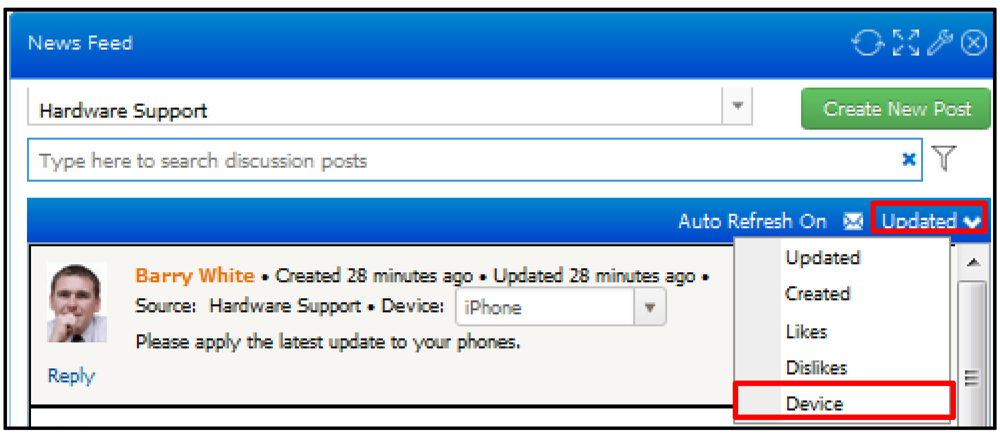
The custom field will appear as shown below to support representatives without Discussion Feed Administrator access.



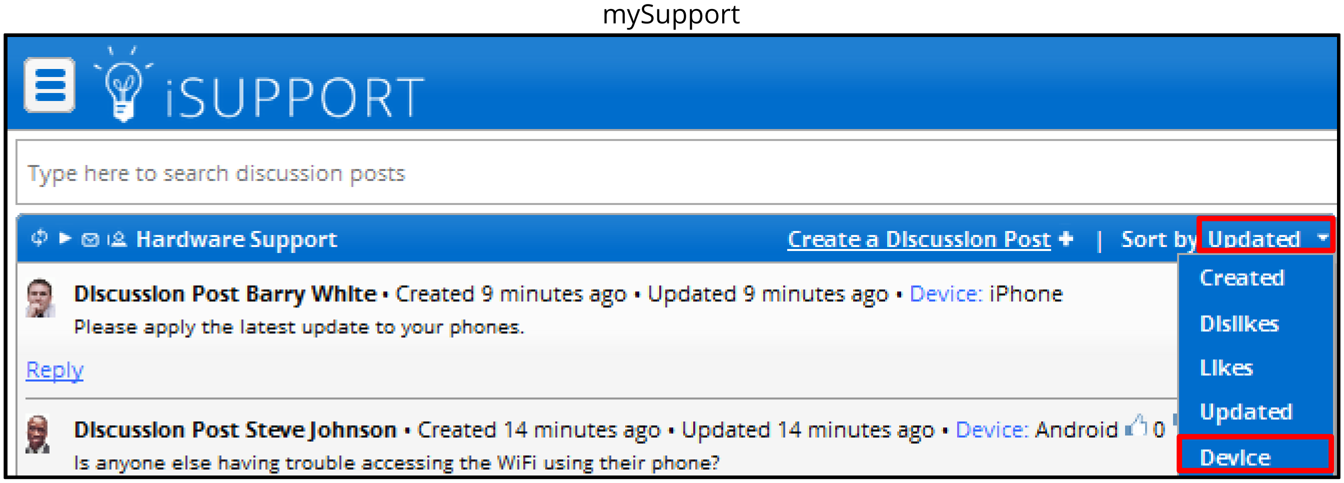
The custom field will appear as follows to support representatives with Discussion Feed Administrator access; another value in the dropdown list can be selected or a different value can be entered.



Posts can be sorted by the custom field configured for a feed.



mySupport

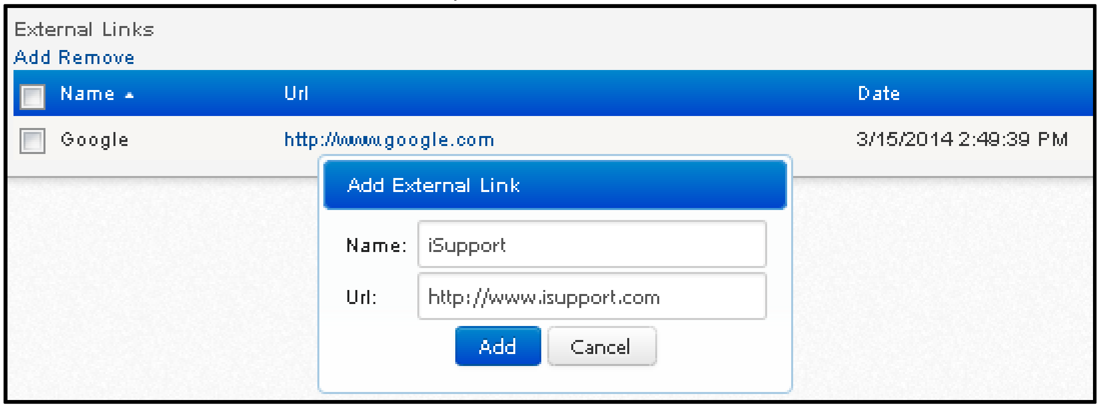


Field/Layout Additions

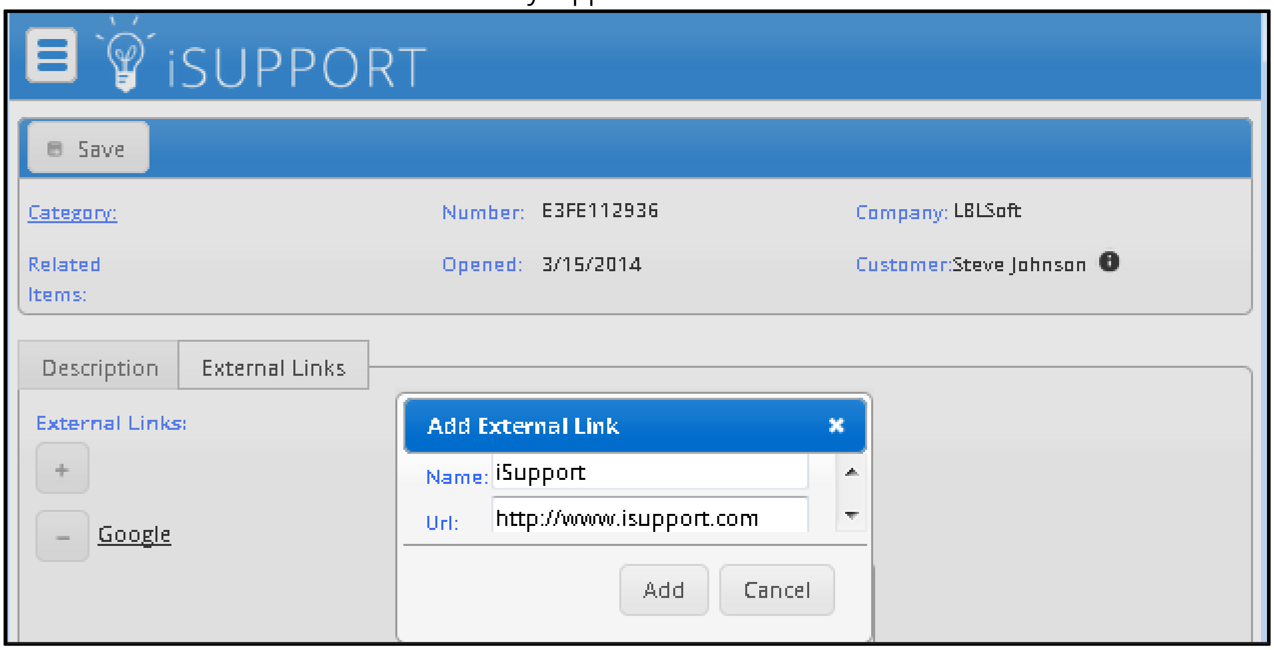
External Web Links

You can now enable support representatives and customers to add a link to a work item.

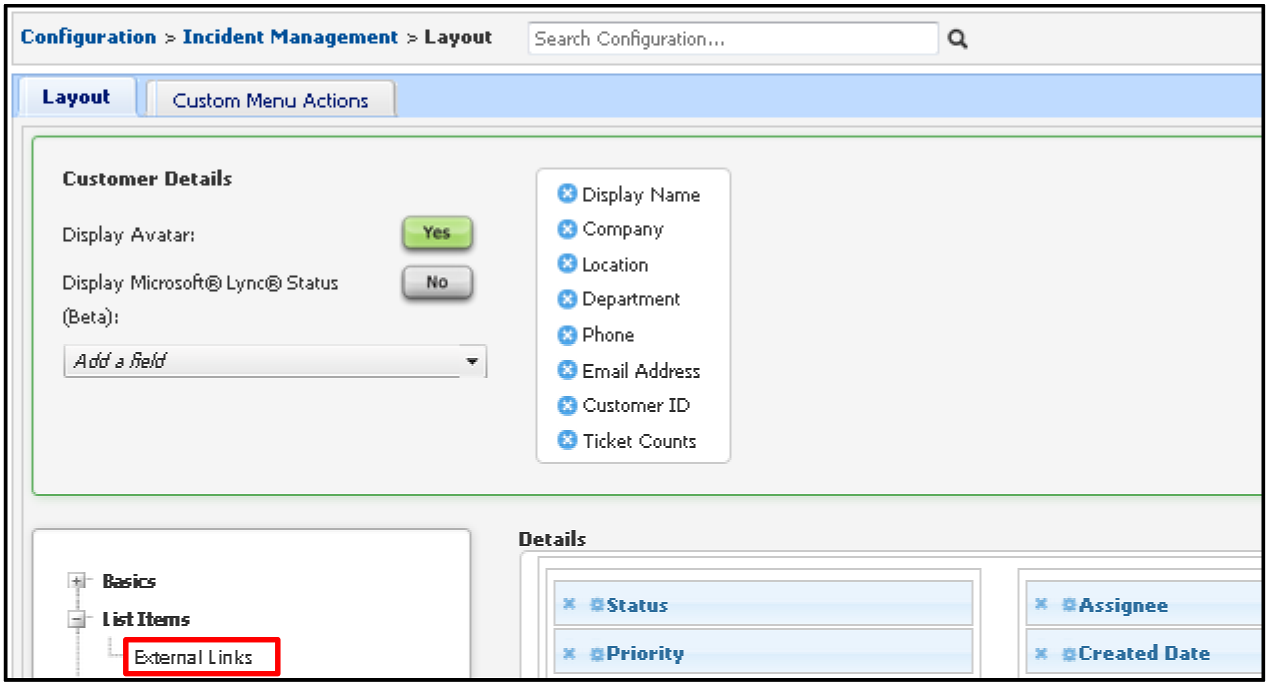
Rep Client work item



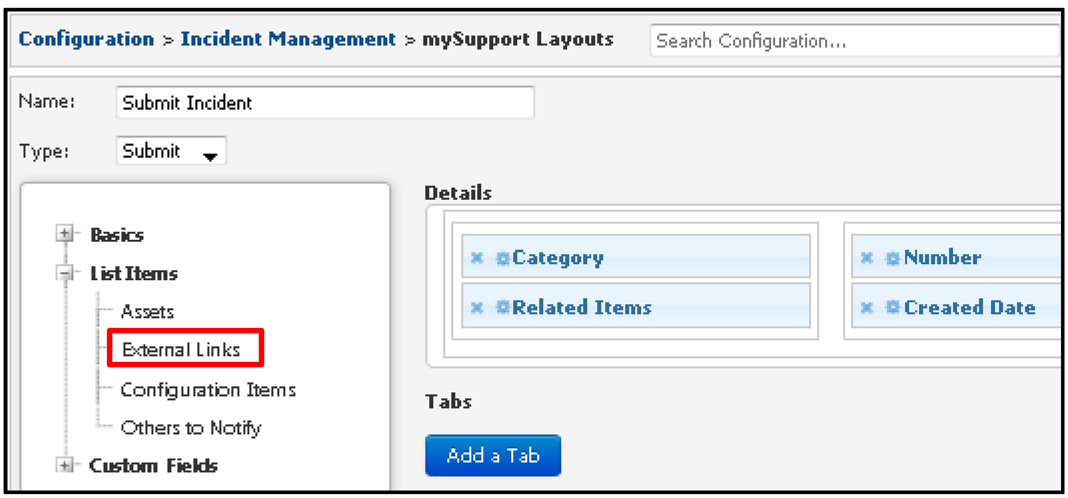
mySupport work item



You can add the External Links field to a work item layout via the Incident, Problem, Change, and Purchasing Layout screens.

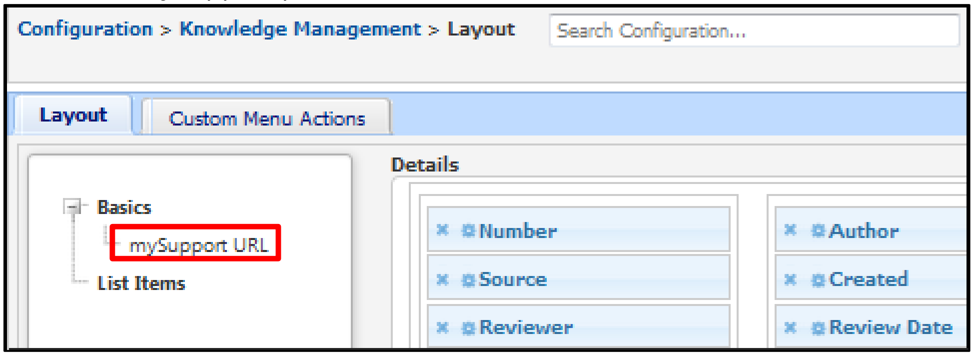


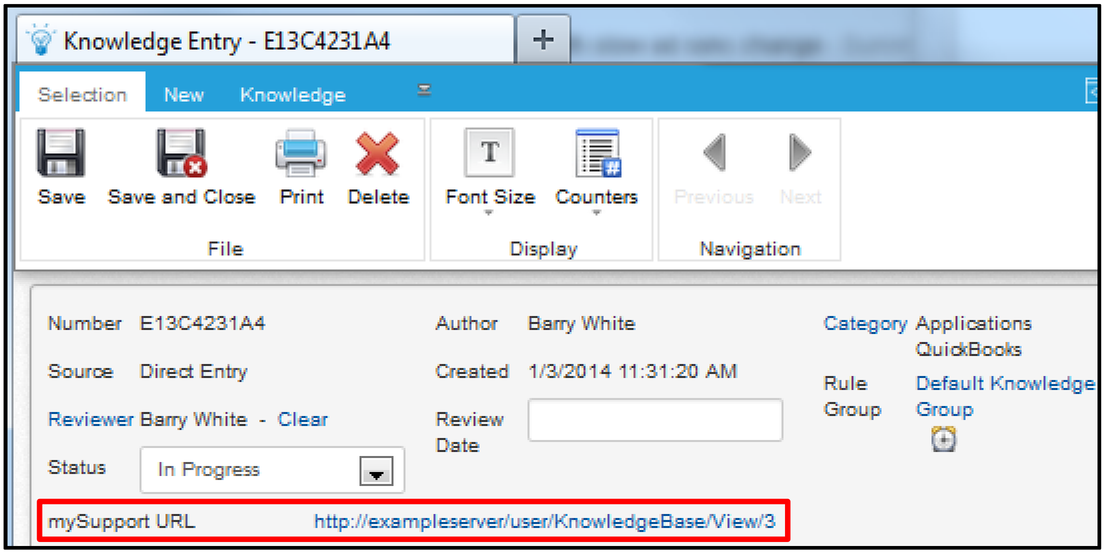
You can add the External Links field to a mySupport work item layout via the Incident, Problem, Change, Purchasing mySupport Layout screens.



Knowledge Entry Links

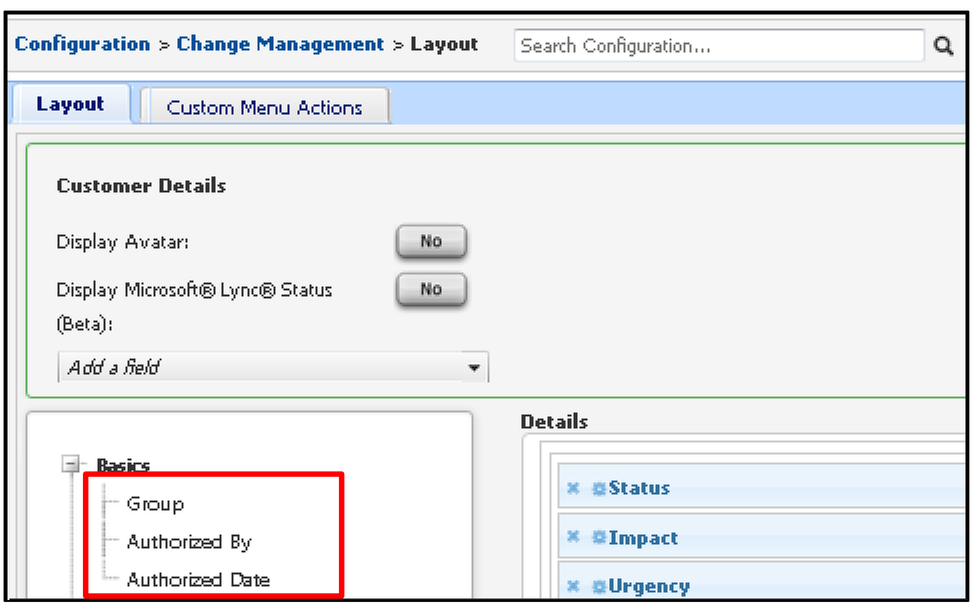
A mySupport URL field has been added to the Knowledge screen layout for including a link to a knowledge entry on the default mySupport portal.





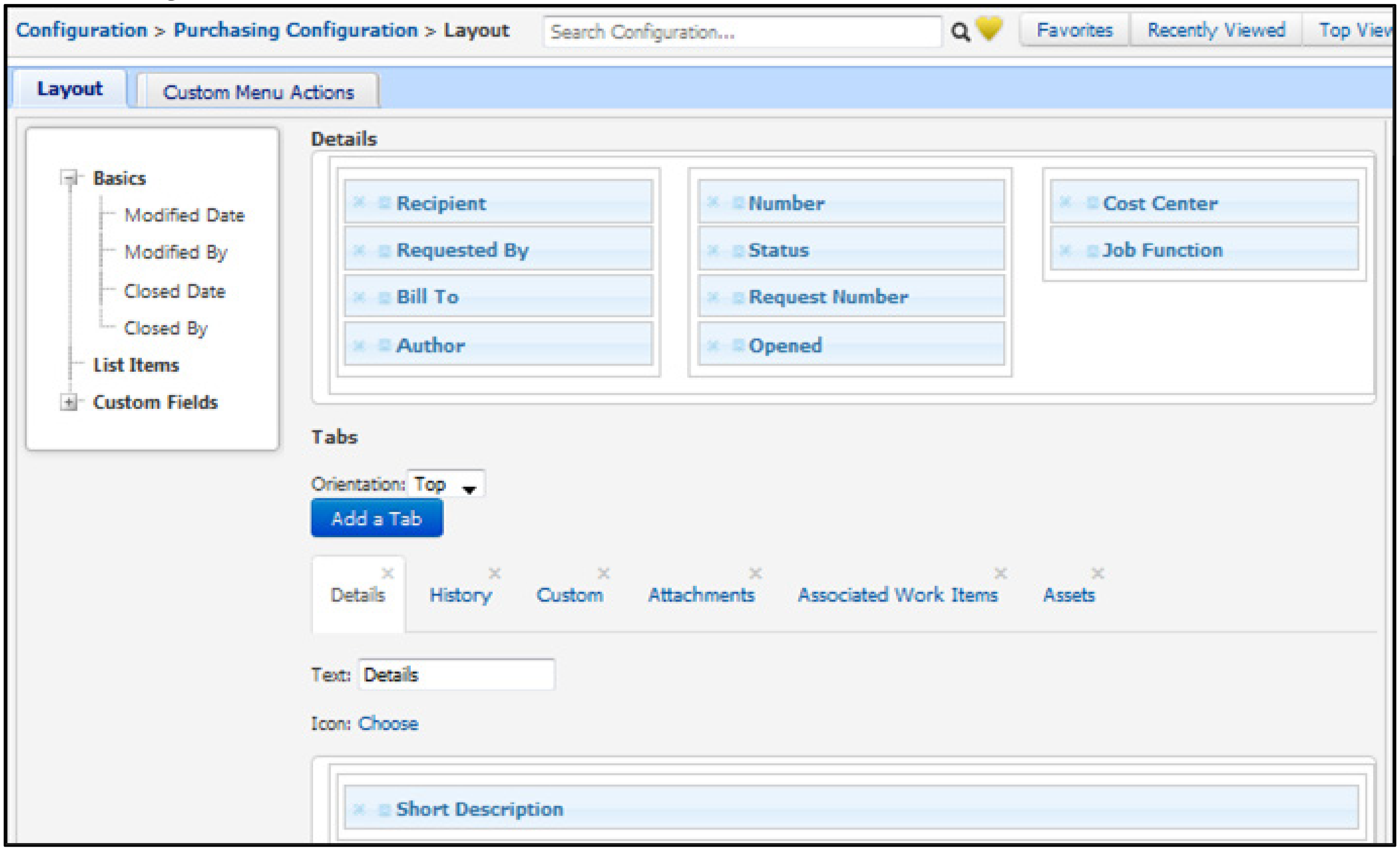
Rep Group, Authorized by, and Authorized Date/Time

A Rep Group field has been added to work item layouts, and Authorized By and Authorized Date/Time fields have been added to Change layout options.

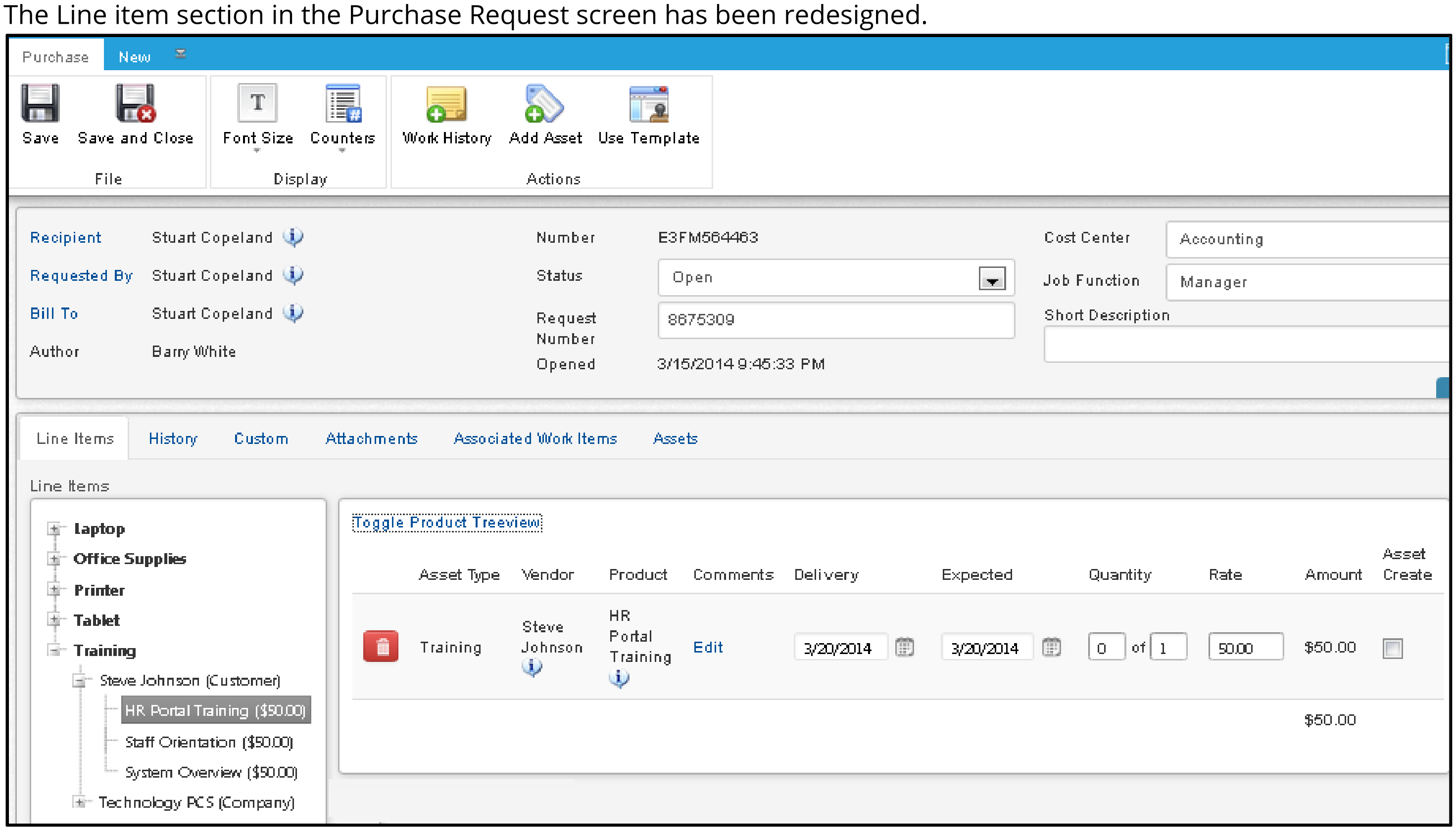


Purchase Request Screen Layout

You can now configure the fields included in the Purchase Request screen via the Purchasing Configuration | Layout screen in configuration.

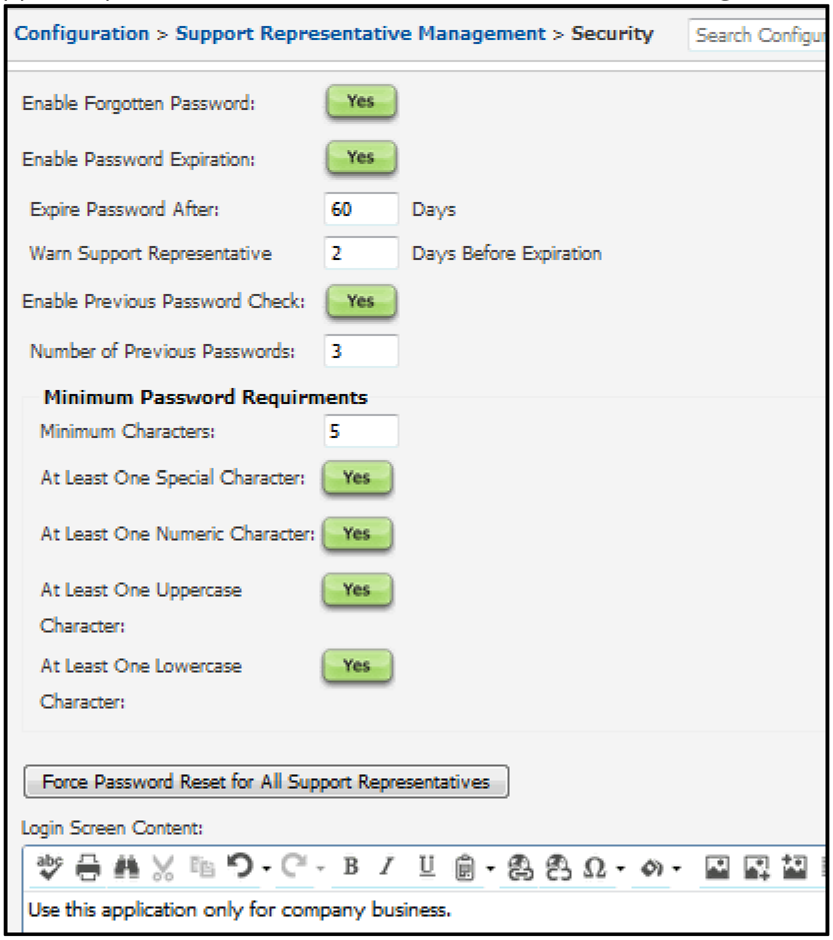


The Line item section in the Purchase Request screen has been redesigned.



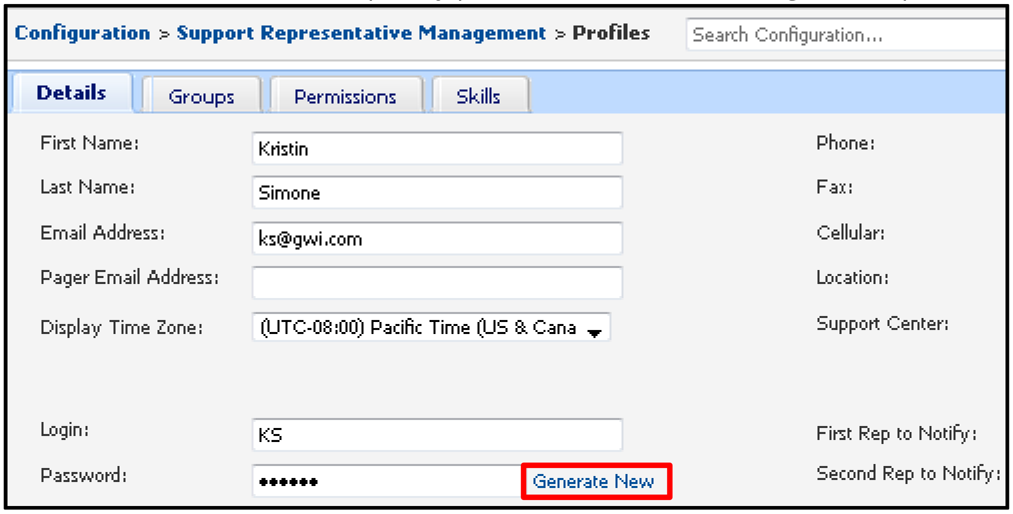
Password Complexity and Expiration for Support Representatives

If you are not using Microsoft® Windows-based authentication with iSupport, you can now use the Security screen to enable a Forgot Password link, password expiration after a specified number of days, a previous password check with a specified number of previous passwords, and minimum password requirements. You can also force a password reset for all support representatives and include formatted text and images in the login screen.

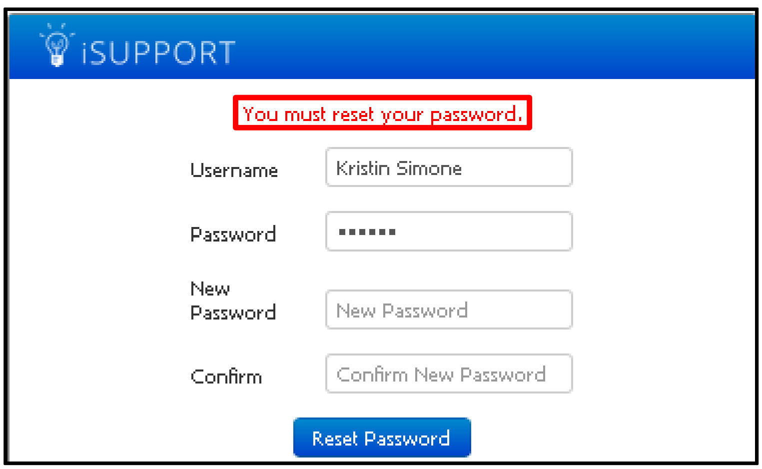


Note that after you upgrade to version 12.7, the minimum number of characters in a password will default to five.

Only temporary passwords can be entered via the Support Representative Profile screen, and configured password requirements will be enforced when you enter a password in the Support Representative Profile screen. You can use the Generate New link to create a new temporary password that meets configured requirements.

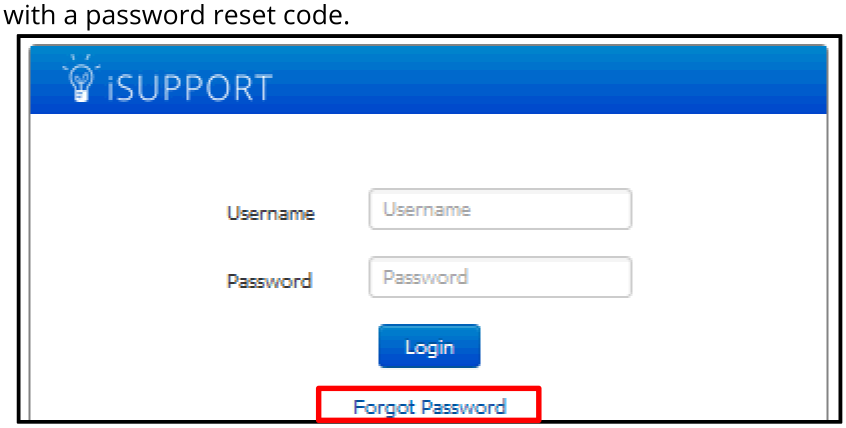


The support representative will be forced to enter a new password after entering his/her username and the temporary password.

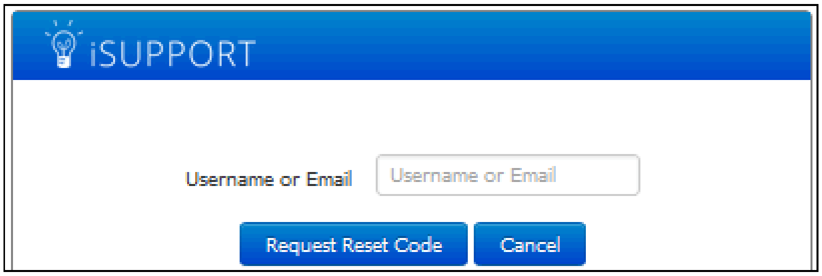


Forgot Password

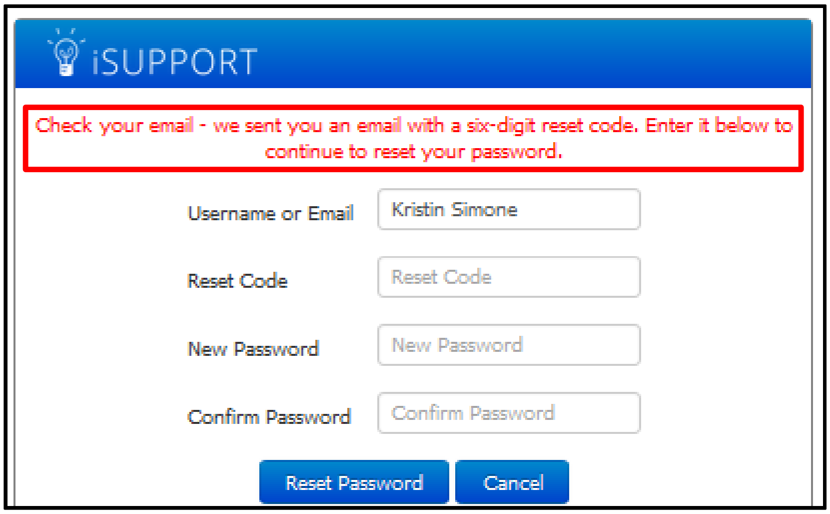
Use the Forgot Password option to include a Forgot Password link in the Login dialog and send an email to a support representative with a password reset code.



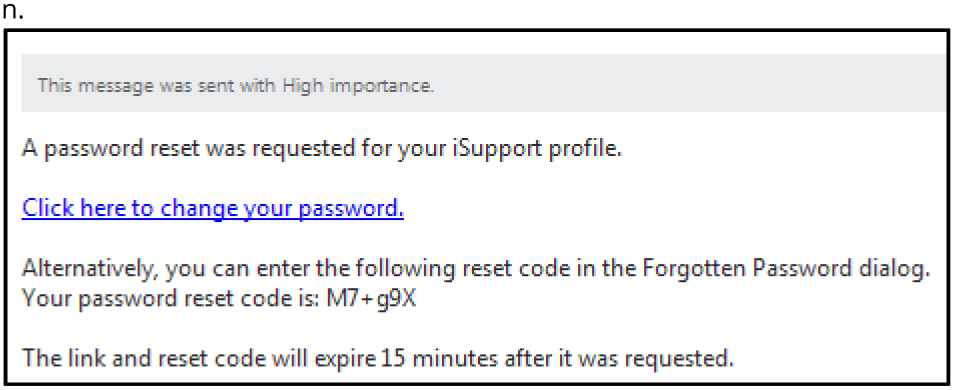
If the support representative hasn't entered a username or email address in the login dialog, the following dialog will appear:



Once a username or email address has been entered, the following dialog will appear:



An email with High importance will be sent to the support representative with a six-digit reset code and a link to the Desktop login screen.


This message was sent with High importance.

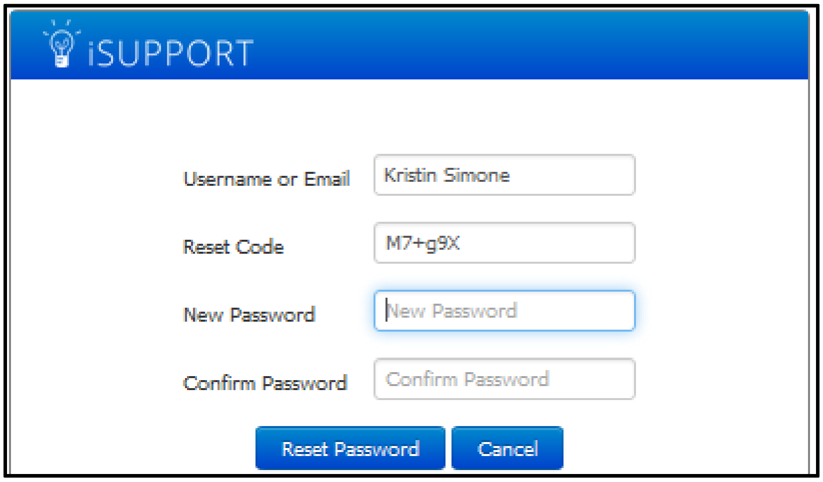
A password reset was requested for your iSupport profile.

Click here to change your password.

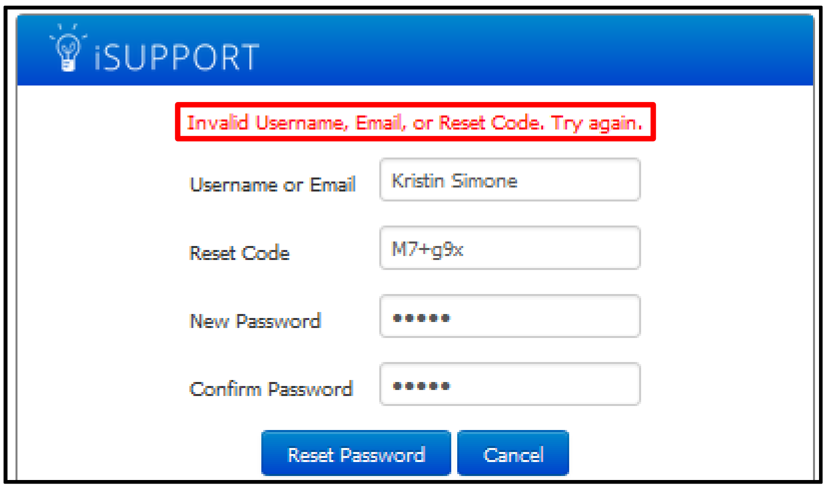
Alternatively, you can enter the following reset code in the Forgotten Password dialog.
Your password reset code is: M7+g9X

The link and reset code will expire 15 minutes after it was requested.

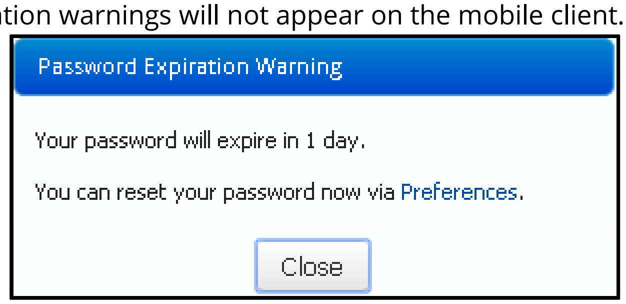
The following appears when the link is clicked:



The reset code expires if more than 15 minutes has passed since the password request; the following dialog will appear. The support representative can click Cancel to click the Forgot Password link again, and a new reset code must be configured by the administrator.

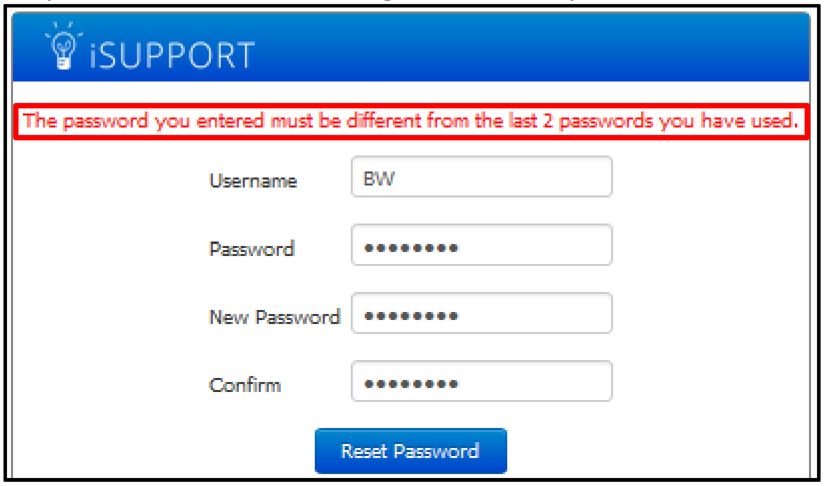


<u>Password Expiration</u>
The Password Expiration feature enables you to specify a number of days after which a login password will expire; the Password Expiration Warning dialog will display to the support representative after every login via the iSupport Desktop until the configured timeframe has been reached. The expiration timeframe will be based on the last time a support representative reset their password or the date and time at which the Password Expiration feature was last configured. Note that expiration warnings will not appear on the mobile client.



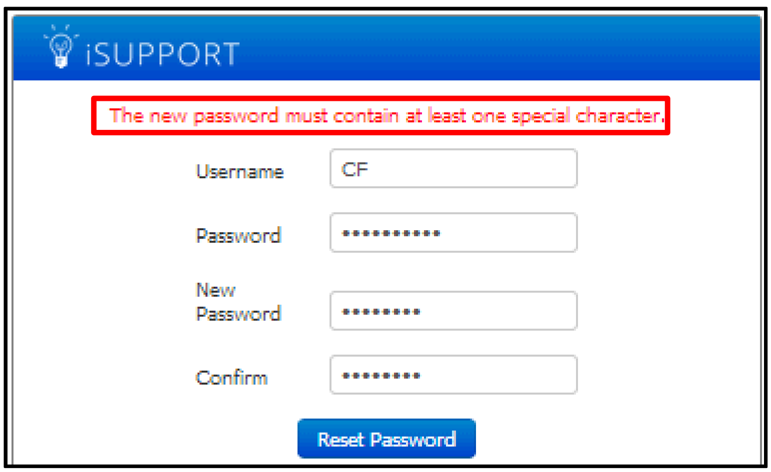
<u>Previous Password Check</u>
Use the Previous Password Check feature to compare a support representative's new password with a configured number of the support representative's previous passwords and prevent use of a matching password. Note that

when this feature is initially enabled after you upgrade to version 12.7, a support representative's current password will not be used in the list of passwords to be checked against the new password.



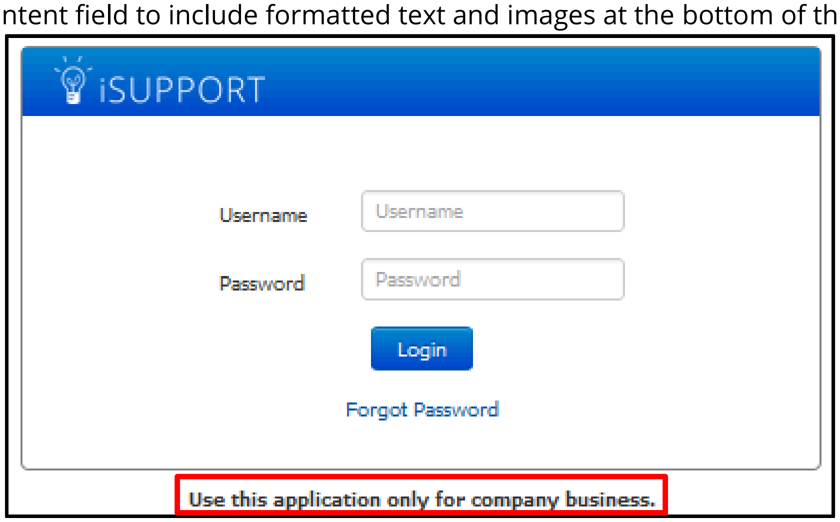
Minimum Requirements

You can require new passwords to contain at least one special character, numeric character, uppercase character, and lowercase character, as well as a minimum number of characters. If a support representative tries to enter a password without the minimum requirements, a message will appear with the missing requirement.



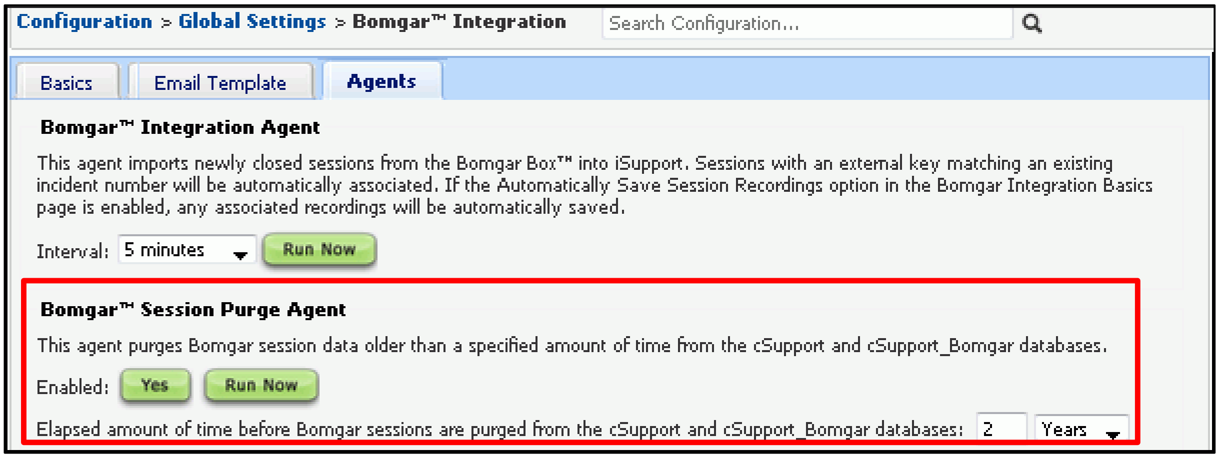
Login Screen Content

Use the Login Screen Content field to include formatted text and images at the bottom of the login dialog.

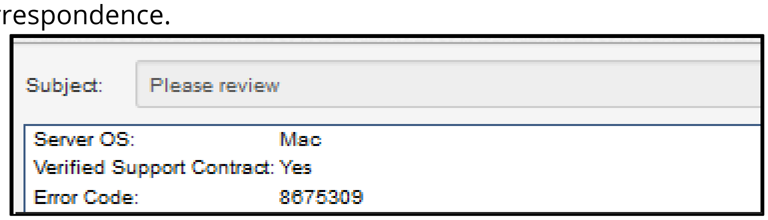


Miscellaneous

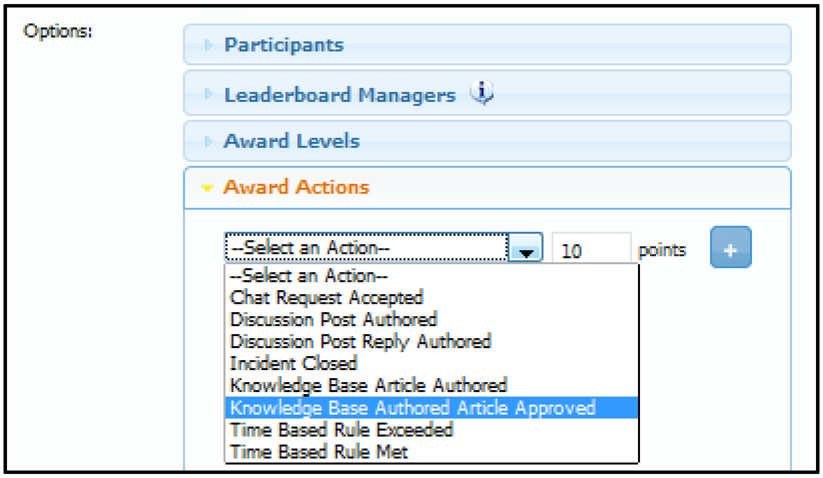
- If you add an existing work item to a hierarchy of work items, a prompt will appear for copying any custom values from the parent work item.
- Archive agent settings have been removed from the Incident Basics configuration screen. (These settings remain in the Administration Tools | Agents screen.)
- A Bomgar Session Purge agent has been added to permanently delete Bomgar sessions that are older than a specified number of days or years from the cSupport and cSupport_Bomgar databases after a specified number of years past the archive date.



- Problem, Change, and Purchase archives have been added to Global Search options.
- An Open in New Window option has been added to the History field in the Customer Profile screen.
- An Active button has been added to the Customer | Rules screen; you can use it to prevent the rule from executing after every save of a Customer Profile record.
- You can now pin Problem records to the Pin Board component.
- A Custom Field List include field has been added to the list of include fields available for work item custom notifications and correspondence; this include field will list all of the custom fields and values for the work item associated with the correspondence.



- A Knowledge Base Authored Article Approved award action has been added to Leaderboard component configuration.



- For the Route to Self feature on incidents, problems, and changes, if the support representative to which a work item is being routed is in a group a work item is already linked with, the group stays as set. If the assignee is not in the work item's existing group, the assignee and group will be changed.

- You can now set a start time when you select Daily in the AD, LDAP, and RDB synchronization interval field in the Directory Integration configuration screen.