

New in iSupport® v12.7

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

Social Client renamed to “mySupport”

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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.

Configuration > mySupport > mySupport Portals Search Configuration...

Basics Access

mySupport Portal Name: mySupport Portal

mySupport Portal URL: http://example/user

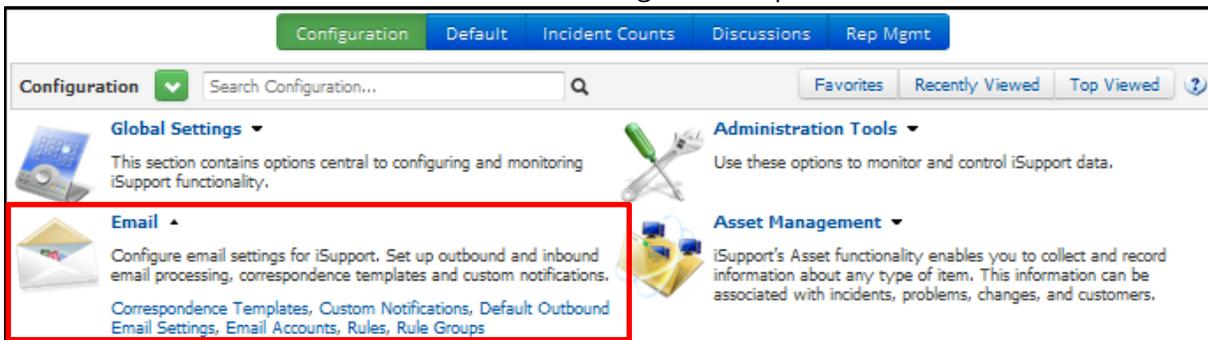
Default for mySupport URL in Notifications

Default mySupport Options: Select an Item

Default Mobile mySupport Options: None

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.

Configuration > Email > Email Accounts Search Configuration...

Inbound Settings | Outbound Settings

Account Details | **Email Processing**

Use HTML from Email Body in Description:

Include "EMAIL SUBJECT:" in Description:

Include "EMAIL BODY:" in Description:

Attach Alternate Version to Correspondence:

Enable Social Client Access for Auto-Created Customer Records from Email:

Append Additional Email Addresses to Others to Notify:

Rule Group:

- None
- Default Email Rule Group**

Configuration > Email > Rule Groups Search Configuration...

Basics | Email Accounts

Name:

This is the default Email Rule Group

Add Rules to This Rule Group:

On Save

Add

<input type="checkbox"/>	Name	Position
<input type="checkbox"/>	Password Reset Incident Creation	1
<input type="checkbox"/>	Spam Rule - Discount	2
<input type="checkbox"/>	Update Customer Profile	3

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.

The screenshot shows the 'Configuration > Email > Rules' interface. The rule name is 'Password Reset Incident Creation'. Under 'Configure Conditions', the rule type is 'On Email Received'. The match criteria are 'All' of the following conditions. The first condition is 'Subject' 'Contains' 'password'. The second condition is 'From' 'Is' (with a dropdown menu open showing options like 'Contains', 'Does Not Contain', 'Is', 'Is Not', 'Starts With', 'Ends With', 'Is Any Customer', and 'Is Not Any Customer'). The 'Configure Actions' section shows 'Create' 'Incident From Template' 'To' 'Password Reset' and an 'Append Email Content:' checkbox which is checked and highlighted with a red box.

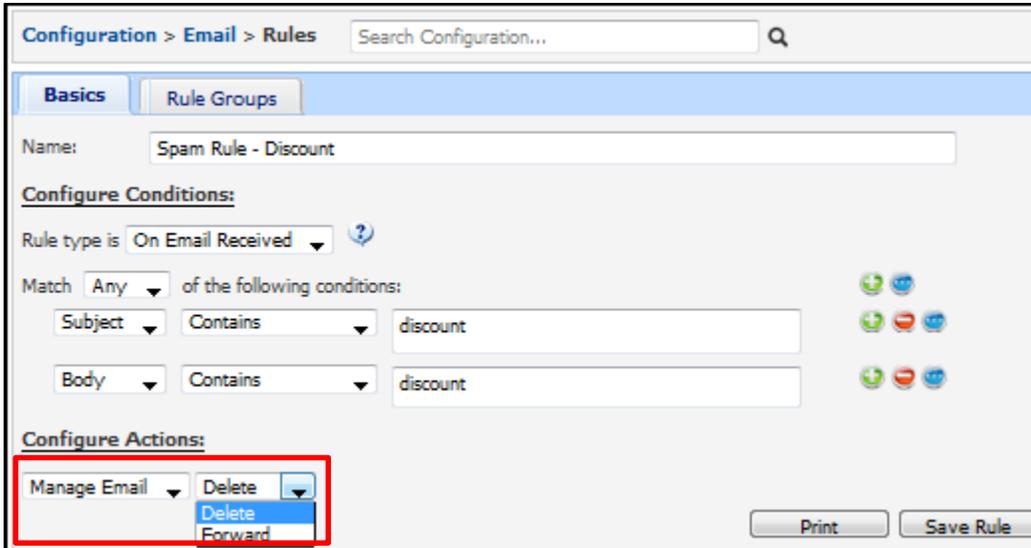
When configuring an action to create an incident or change using a template, use the Append Email Content button to enable the subject and/or body of the email to be added after the content in the template's Description field to the incident or change created by the rule. If the Short Description field 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.

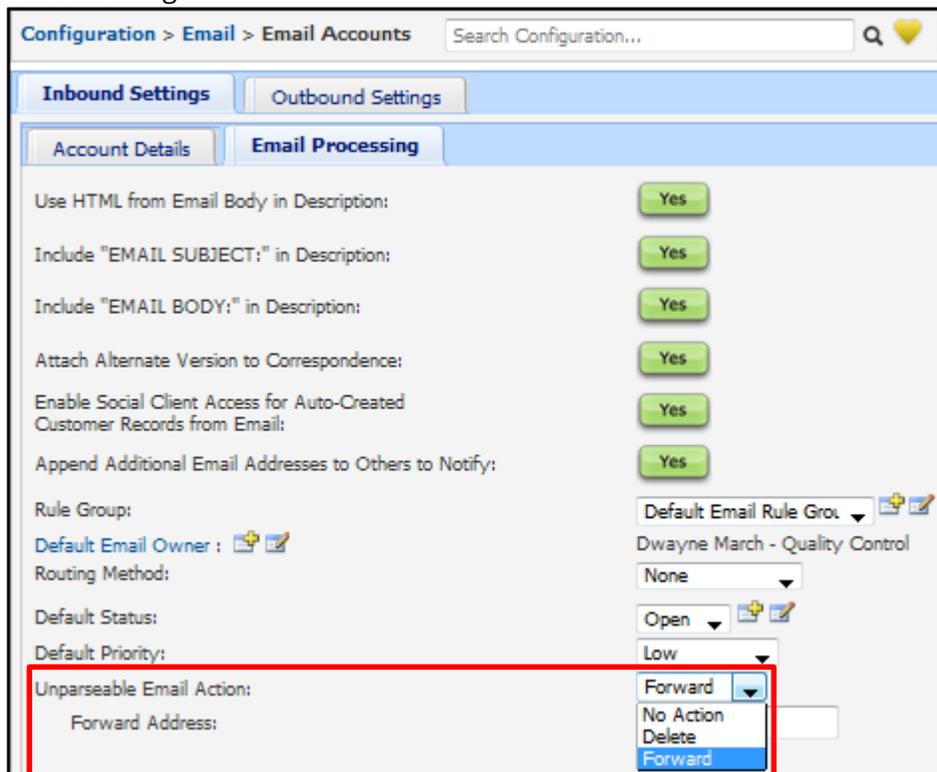
The screenshot shows the 'Configuration > Email > Rules' interface. The rule name is 'Update Customer Profile'. Under 'Configure Conditions', the rule type is 'On Email Received'. The match criteria are 'All' of the following conditions. The first condition is 'From' 'Is Customer'. The second condition is 'Body' 'Contains' 'sale'. The 'Configure Actions' section shows 'Create' 'Customer Profile History' which is highlighted with a red box.

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.

The screenshot shows the 'Email Accounts' configuration page in a web application. The 'Email Processing' tab is active. The page contains various settings for email processing, including options to include HTML, subject, and body in descriptions, and to attach alternate versions. A red box highlights the 'Update History' section, which contains a descriptive paragraph and several 'Update History' options, each with a 'Yes' button.

Configuration > Email > Email Accounts Search Configuration... Favorites

Inbound Settings | Outbound Settings

Account Details | **Email Processing**

Use HTML from Email Body in Description:

Include "EMAIL SUBJECT;" in Description:

Include "EMAIL BODY;" in Description:

Attach Alternate Version to Correspondence:

Enable mySupport Access for Auto-Created Customer Records from Email:

Append Additional Email Addresses to Others to Notify:

Rule Group: Default Email Rule Gro...  

Default Email Owner:   Dwayne March - Quality Control

Routing Method: None

Default Status: Open  

Default Priority: Low

Unparseable Email Action: Delete

For each of the following, select Yes to enable searches for existing work item numbers; history will be updated if a match is found. Email rules and processing will not apply; however, you can configure work item rules to perform additional actions.

Update History in Existing Incident Record if Number Included in Email:

Update History in Existing Change Record if Number Included in Email:

Update History in Existing Problem Record if Number Included in Email:

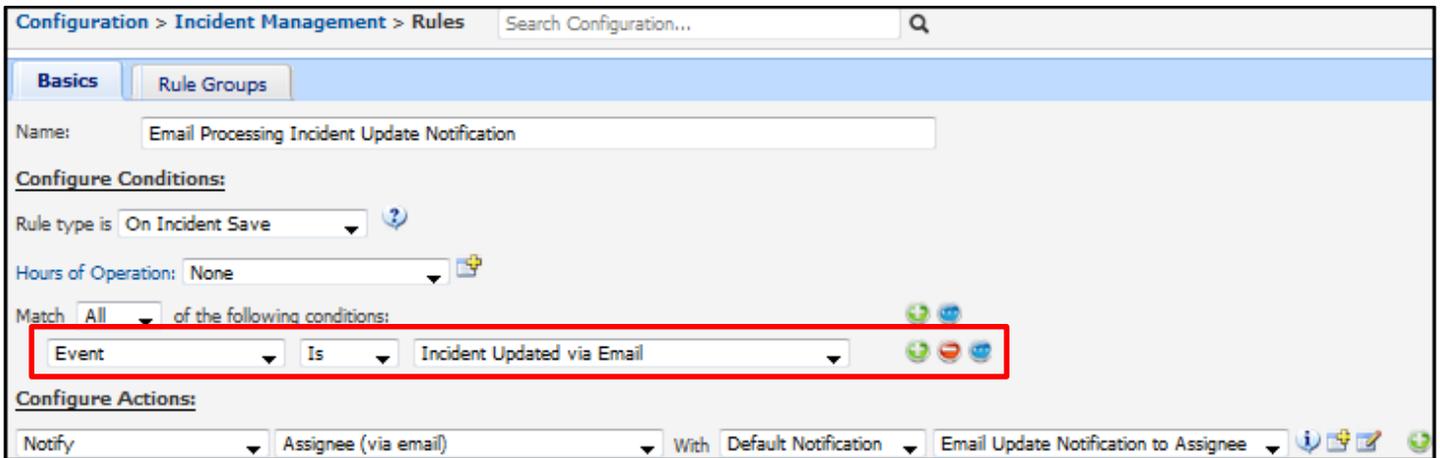
Update History in Existing Opportunity Record if Number Included in Email:

Update History in Existing Purchase Record if Number Included in Email:

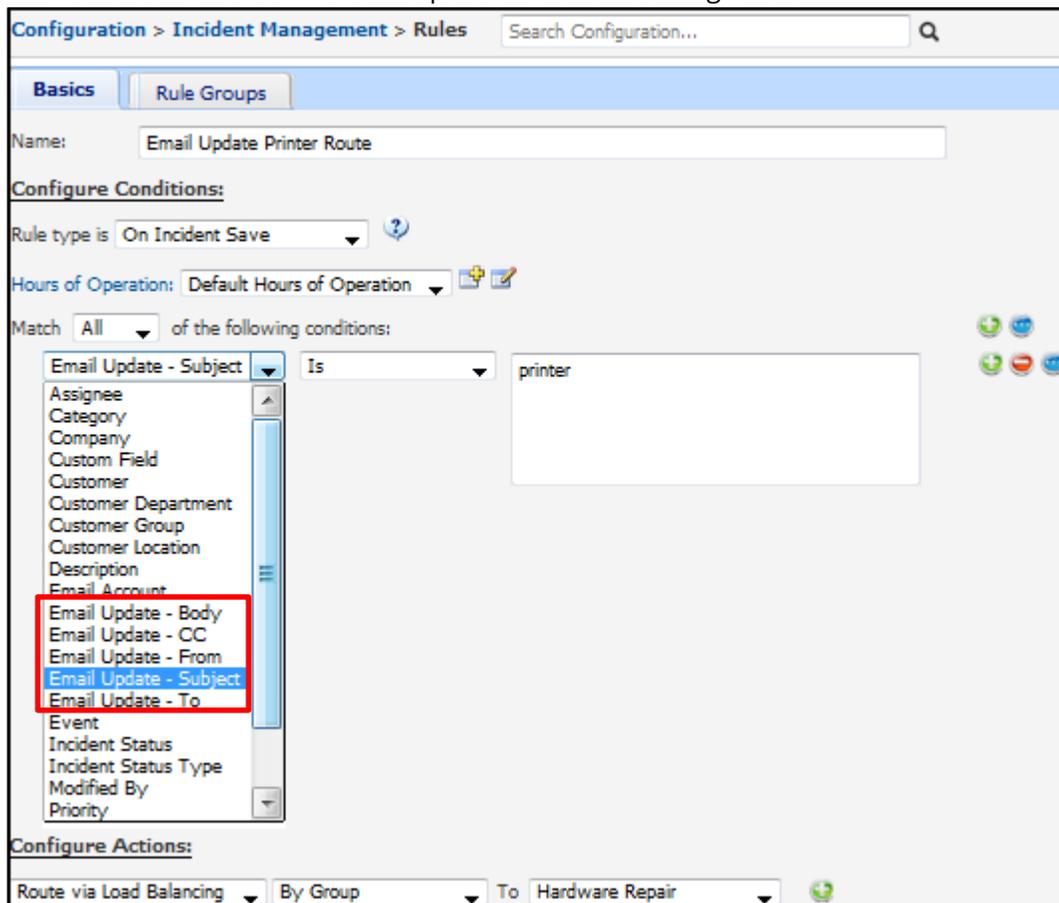
 Recipient Notification Mappings

Update History in Existing Customer Record if Ref ID Included in Email:

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.

The screenshot shows the configuration page for a rule named "Night Support Escalation". The breadcrumb navigation is "Configuration > Incident Management > Rules". There are two tabs: "Basics" (selected) and "Rule Groups". The "Name" field contains "Night Support Escalation". Under "Configure Conditions:", the "Rule type is" dropdown is set to "On Incident Save". The "Hours of Operation" dropdown is highlighted with a red box and set to "Night Support". Below this, the "Match" dropdown is set to "All", and the condition is "Customer Group" Is "Executive Mgmt Team". There are several status icons on the right side of the page.

New Conditions and Actions

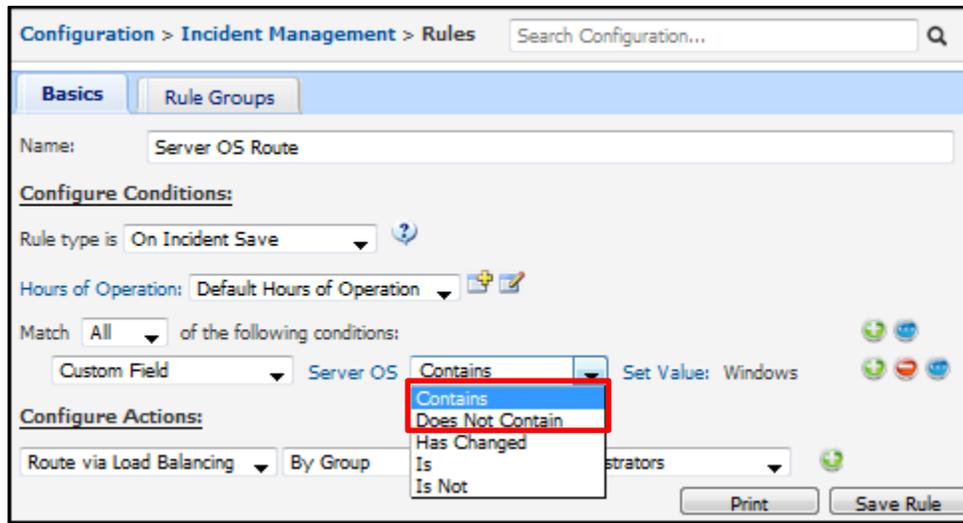
Create Related Work Item Action for Incident and Change Rules

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.

The screenshot shows the configuration page for a rule named "Computer Request". The breadcrumb navigation is "Configuration > Incident Management > Rules". There are two tabs: "Basics" (selected) and "Rule Groups". The "Name" field contains "Computer Request". Under "Configure Conditions:", the "Rule type is" dropdown is set to "On Incident Save". The "Hours of Operation" dropdown is set to "Default Hours of Operation". Below this, the "Match" dropdown is set to "All", and the condition is "Custom Field" New Computer Needed Is "Set Value: Yes". Under "Configure Actions:", the "Create Related" dropdown is highlighted with a red box, and the action is "Incident From Template" To "New Laptop Request". There are "Print" and "Save Rule" buttons at the bottom right.

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.

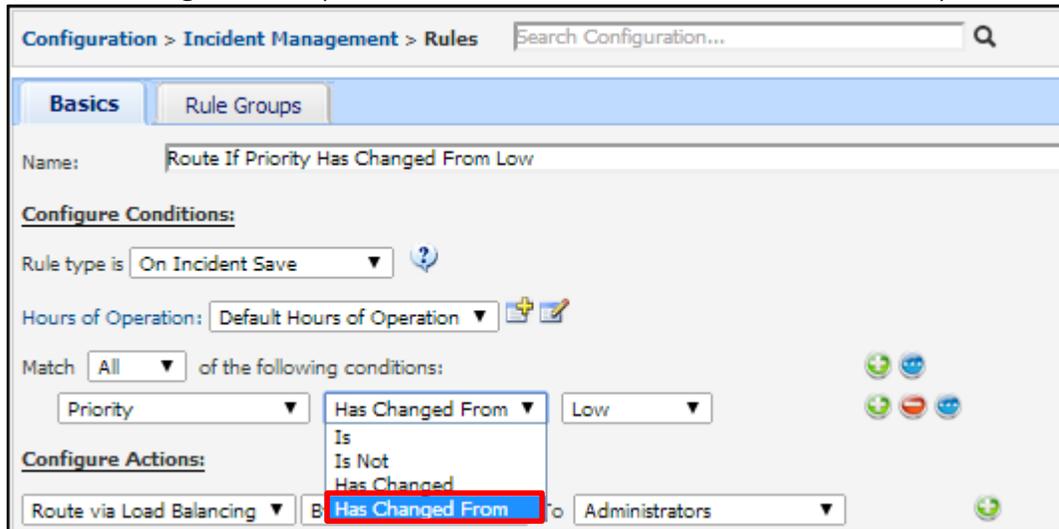


Modified By Condition Now Contains Any Customer and Assigned Customer Options

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.

The screenshot shows the 'Webhooks' configuration page in the iSupport system. The breadcrumb navigation is 'Configuration > Incident Management > Webhooks'. The page has a search bar labeled 'Search Configuration...'. The 'Name' field is 'Incident Webhook' and the 'URL' field is 'http://www.example.com'. Under the 'Parameters' section, there is a tree view on the left under 'Basics' with items: Number, Status, Status Identifier, Priority, and Assignee. On the right, a table maps iSupport fields to parameter names:

iSupport Field	Parameter Name
Number	Number
Assignee	Assignee
Customer	Customer

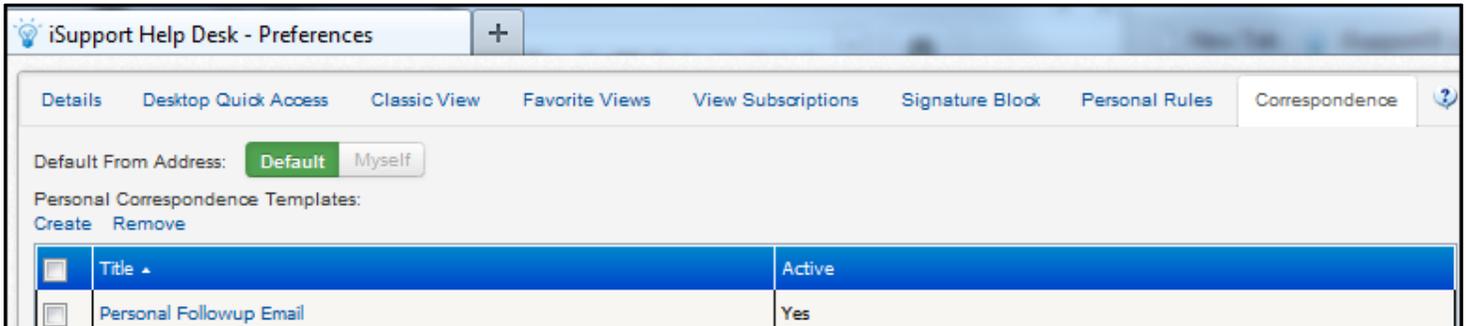
Use the Rule screen to configure the conditions and time frame for triggering the post action. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition.

The screenshot shows the 'Rules' configuration page in the iSupport system. The breadcrumb navigation is 'Configuration > Incident Management > Rules'. The page has a search bar labeled 'Search Configuration...'. The 'Basics' tab is selected, and the 'Name' field is 'Incident Webhook Rule'. Under 'Configure Conditions:', the 'Rule type is' dropdown is set to 'On Incident Save or Email Update Received'. The 'Hours of Operation' is '24/7'. The 'Match' dropdown is 'All' of the following conditions. One condition is shown: 'Category' is 'Web Site - Access Request' and 'Is' 'Categorization: Web Site - Access Request'. Under 'Configure Actions:', the 'Change' dropdown is open, showing a list of actions: 'Change', 'Change', 'Create Related', 'Execute Webhook' (highlighted with a red box), 'Initiate Approvals', 'Notify', 'Route via Load Balancing', and 'Route via Round Robin'. The 'Incident Webhook' dropdown is also visible. At the bottom right, there are 'Print', 'Save Rule', and 'Cancel' buttons.

Correspondence and Custom Notifications

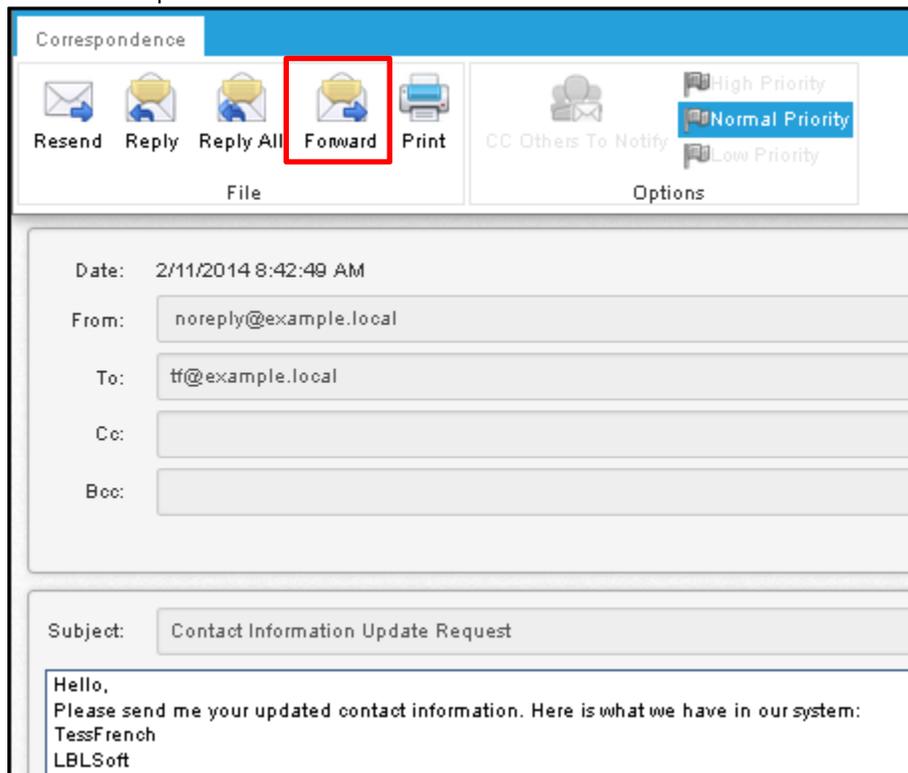
Correspondence Tab/Default From Address in Preferences

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.



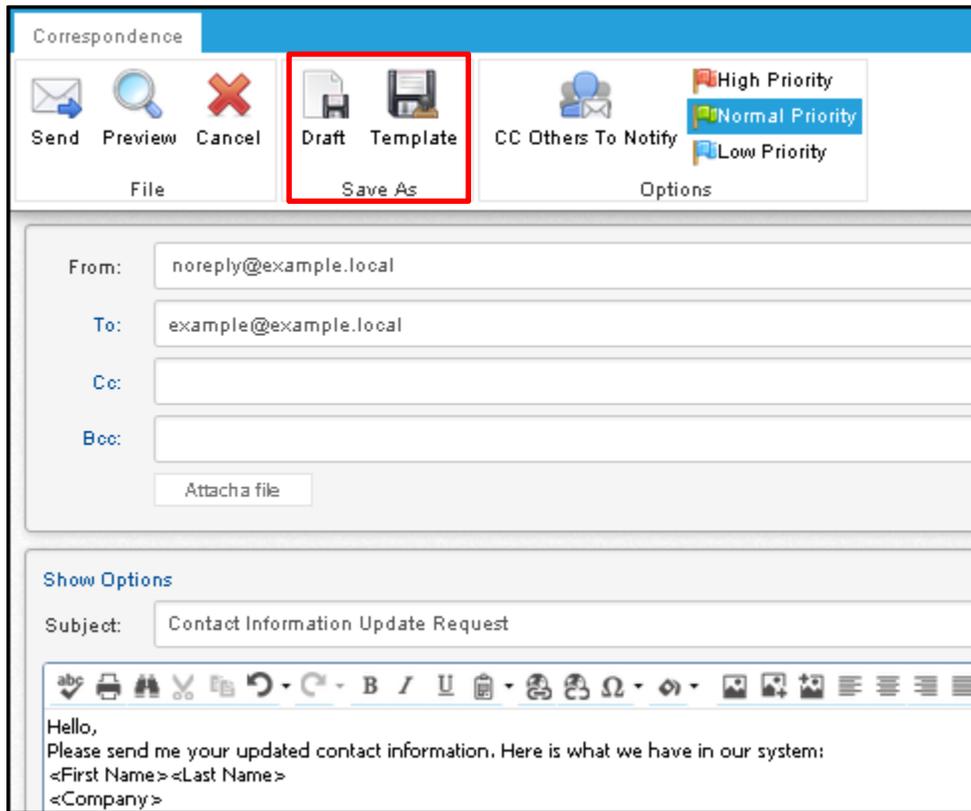
Forwarding Correspondence

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.

The screenshot shows the 'Correspondence' ribbon with the following groups:

- File:** Send, Preview, Cancel
- Save As:** Draft, Template
- Options:** CC Others To Notify, High Priority, Normal Priority, Low Priority

The draft editor fields are:

- From:** noreply@example.local
- To:** tf@example.local
- Cc:** (empty)
- Bcc:** (empty)
- Subject:** Troubleshooting Your Issue

The 'Drafts' tab is selected in the 'Hide Options' section. The tree view shows:

- Related
 - Troubleshooting Your Issue
- All
 - Contact Information Update Request

The draft body text is: Hello <First Name>, I am currently troubleshooting your issue and will contact you shortly. Thanks, Barry

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

The screenshot shows the 'Drafts' tab selected in the 'Hide Options' section. The tree view shows:

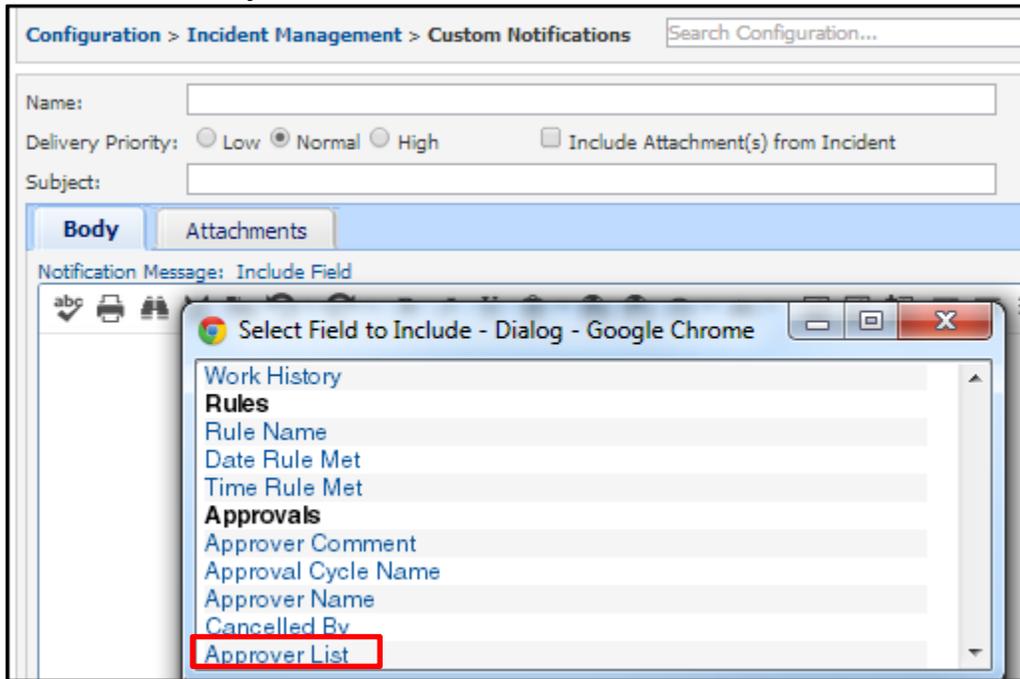
- Related
 - Troubleshooting Your Issue
- All
 - Contact Information Update Request

A context menu is open over 'Troubleshooting Your Issue' with a 'Delete' option. The 'Draft Details' pane is open, showing:

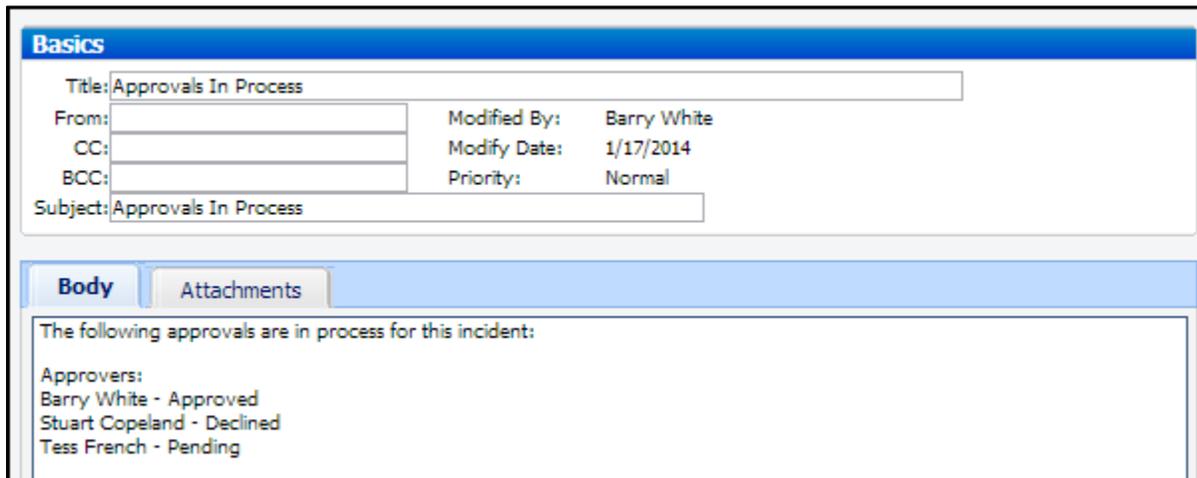
- Source:** Incident - E16A555534
- Saved:** 2/11/2014 8:22:14 AM
- From:** noreply@example.local
- To:** tf@example.local
- Subject:** Troubleshooting Your Issue
- Body:** Hello <First Name>, I am currently troubleshooting your issue and will contact you shortly. Thanks, Barry

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.

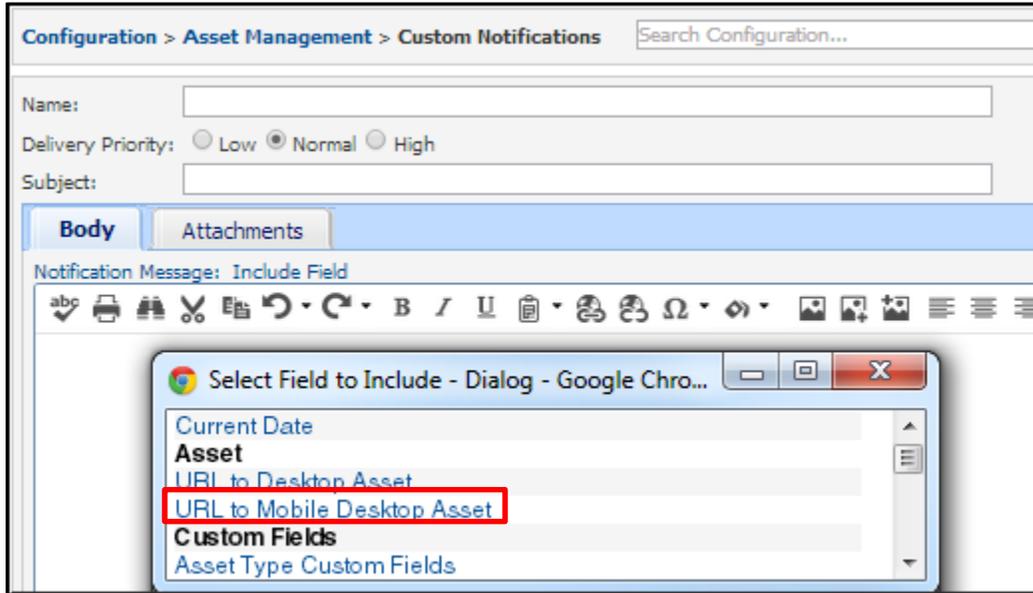


Field values will include a list of the approvers in the current approval cycle as well as any verdict specified by an approver.



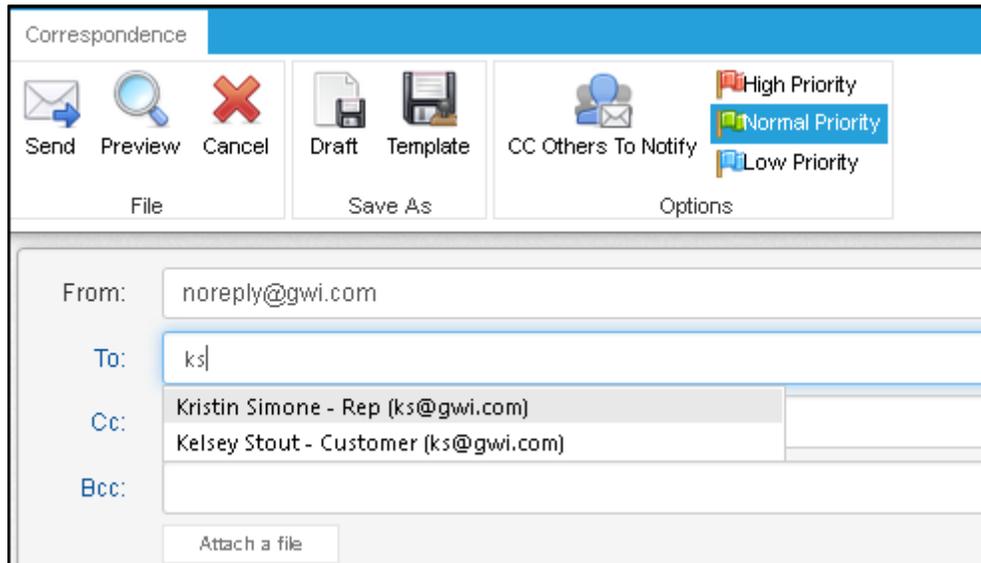
URL to Mobile Desktop Include Field for Correspondence and Custom Notifications

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

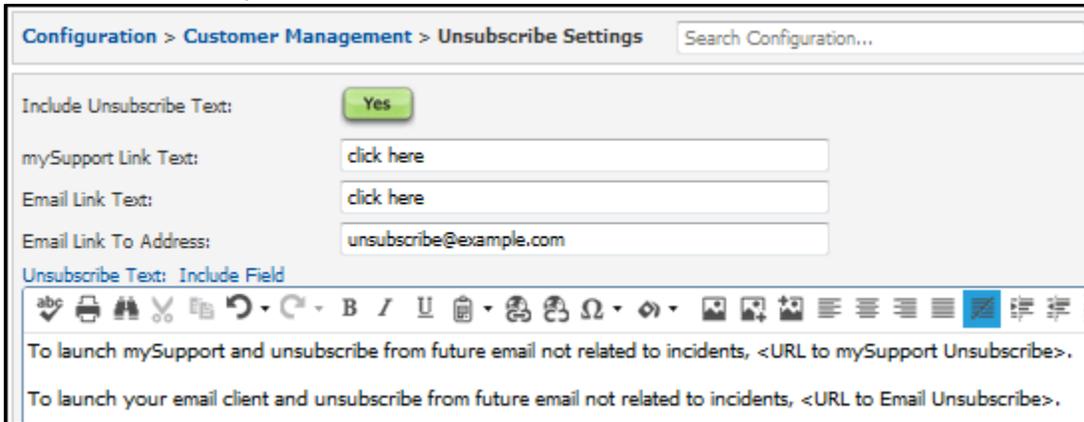
When typing in an address field in the Correspondence screen, matching names and address will appear for selection.



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.



The screenshot shows the 'Unsubscribe Settings' configuration page. At the top, there is a breadcrumb trail: 'Configuration > Customer Management > Unsubscribe Settings' and a search box labeled 'Search Configuration...'. Below this, there are several settings:

- 'Include Unsubscribe Text:' is set to 'Yes' (indicated by a green button).
- 'mySupport Link Text:' is set to 'click here'.
- 'Email Link Text:' is set to 'click here'.
- 'Email Link To Address:' is set to 'unsubscribe@example.com'.

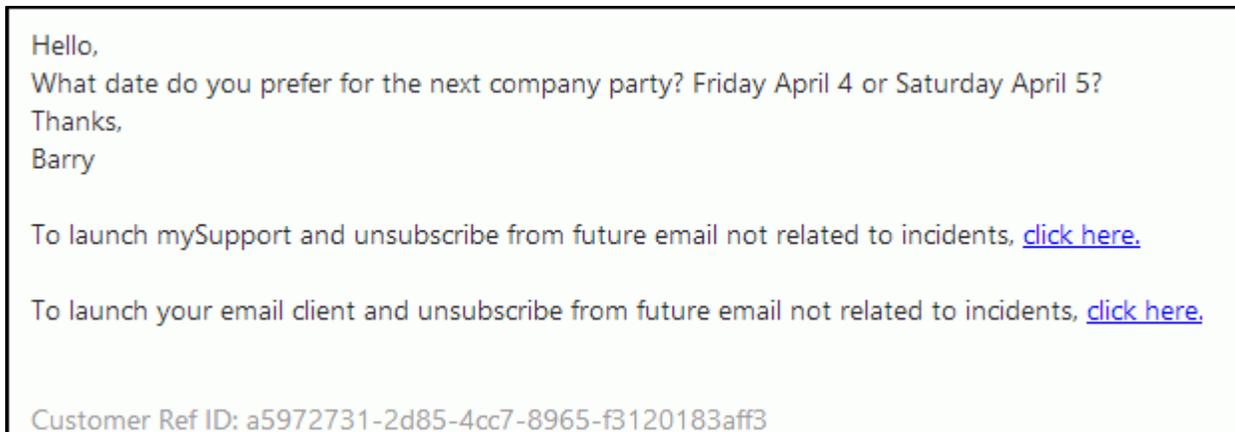
Below the settings is a rich text editor with a toolbar. The text in the editor reads:

Unsubscribe Text: Include Field

To launch mySupport and unsubscribe from future email not related to incidents, <URL to mySupport Unsubscribe>.

To launch your email client and unsubscribe from future email not related to incidents, <URL to Email Unsubscribe>.

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



The screenshot shows an email body with the following content:

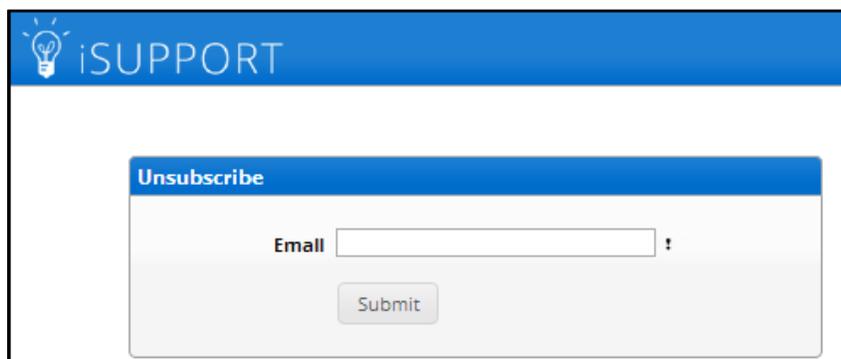
Hello,
What date do you prefer for the next company party? Friday April 4 or Saturday April 5?
Thanks,
Barry

To launch mySupport and unsubscribe from future email not related to incidents, [click here](#).

To launch your email client and unsubscribe from future email not related to incidents, [click here](#).

Customer Ref ID: a5972731-2d85-4cc7-8965-f3120183aff3

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



The screenshot shows the 'Unsubscribe' dialog box. It has a blue header with the 'iSUPPORT' logo. Below the header, there is a text input field labeled 'Email' with a colon to its right. Below the input field is a 'Submit' button.

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.

To... unsubscribe@example.com

Cc...

Send

Subject Unsubscribe

To ensure proper processing, do not edit or remove any of the information below.

Please unsubscribe me from your emails.

Customer Ref ID: eea2c351-d77b-4e8e-9ce8-21a844251de6

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

Configuration > Customer Management > Customer Layout

Layout Custom Menu Actions

Basics

List Items

mySupport

Purchasing

Miscellaneous

Custom Fields

Details

- First Name
- Last Name
- Email
- Unsubscribe Status**
- Phone
- Company
- Created Date
- Created By

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.

Customer View

Save Save And Close Print Delete Font Size Counters Customer Incident Change Correspondence Survey Co

File Display New

First Name Steve Phone 360-397-1004

Last Name Johnson Company LBLSoft

Email sj@example.local Created Date 1/3/2014 7:37:04 AM

Created By Barry White

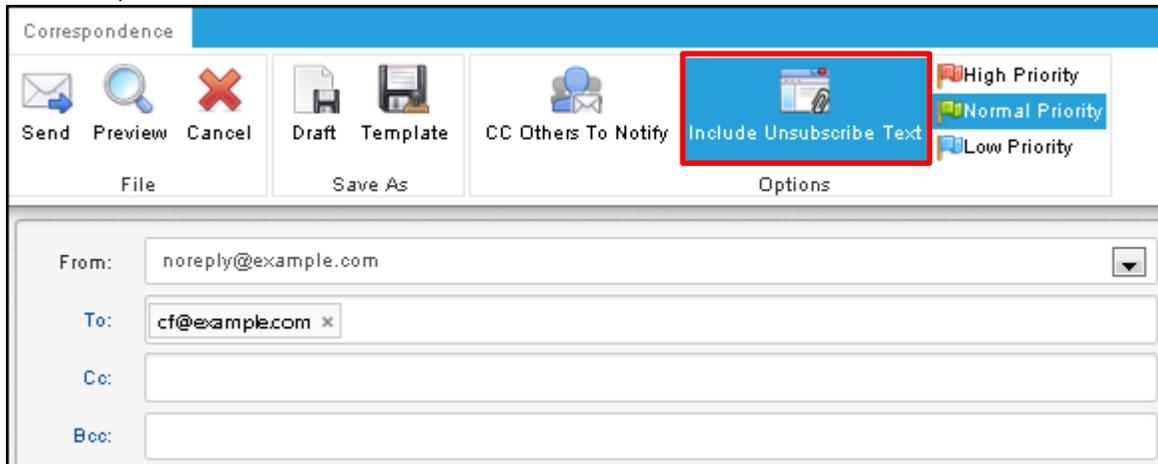
Unsubscribe Status

- Include Unsubscribe Text
- Do Not Include Unsubscribe Text
- Include Unsubscribe Text**
- Unsubscribed

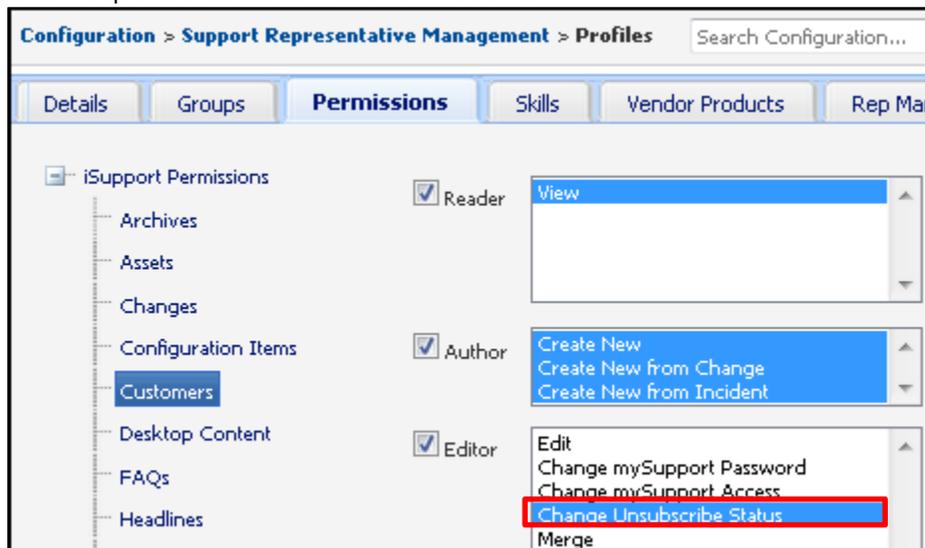
Modified Date 1/3/2014 11:23:40 AM

Modified By Barry White

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.

Configuration > Customer Management > Rules

Search Configuration...

Basics

Name:

Active:

Configure Conditions:

Rule type is

Match of the following conditions:

Is

Configure Actions:

-- Select an Action Type --

- Do Not Include Unsubscribe Text
- Do Not Include Unsubscribe Text
- Include Unsubscribe Text
- Unsubscribed

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

Configure Actions:

To

- Do Not Include Unsubscribe Text
- Do Not Include Unsubscribe Text
- Include Unsubscribe Text
- Unsubscribed

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.

Configuration > Asset Management > Inventory Scan and Monitoring Definitions

Basics | AD Settings | Components to Scan | Monitoring

Scan Name: Start Time:

Scan Type: Duration: Hour(s)

Scan Enabled: Scan On Weekends:

Frequency: Occurs On:

Email Addresses to Notify Upon Scan Completion:

Impersonate WMI Authentication:

Name:

Password:

SNMP Community:

Enable Auto Asset Create from Inventory Scan Agent:

Asset Record Template for Automatic Asset Creation:

Populate Asset Serial Number Field using:

- Do not populate
- Do not populate
- OS Serial Number
- BIOS Serial Number**

Last Run:

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.

Configuration > Asset Management > Inventory Scan and Monitoring Definitions

Basics | DNS Settings | Components to Scan | **Monitoring**

Enable Monitoring: Yes

Reporting:

Report if Device is Offline: Yes

* Report if CPU Utilization is High: Yes

Maximum Utilization: %

Detail Interval: Seconds

Detail Max Intervals:

* Report if Memory Utilization is High: Yes

Maximum Utilization: %

Detail Interval: Seconds

Detail Max Intervals:

* Report if Disk Space is Low: Yes

Minimum Remaining Disk Space: %

Drives to Monitor:

* Report if Service is Not Running: Yes

Services to Monitor:

Actions:

Delay: seconds

Send Email: Yes

Recipients:

Create Work Item: Yes

Work Item Type:

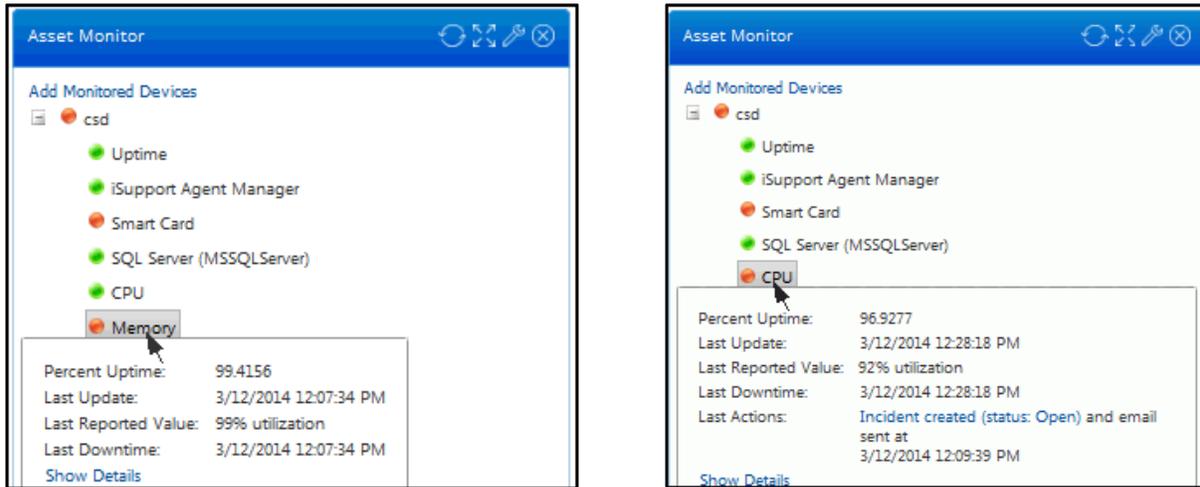
Incident Template:

Default Assignee: Barry White

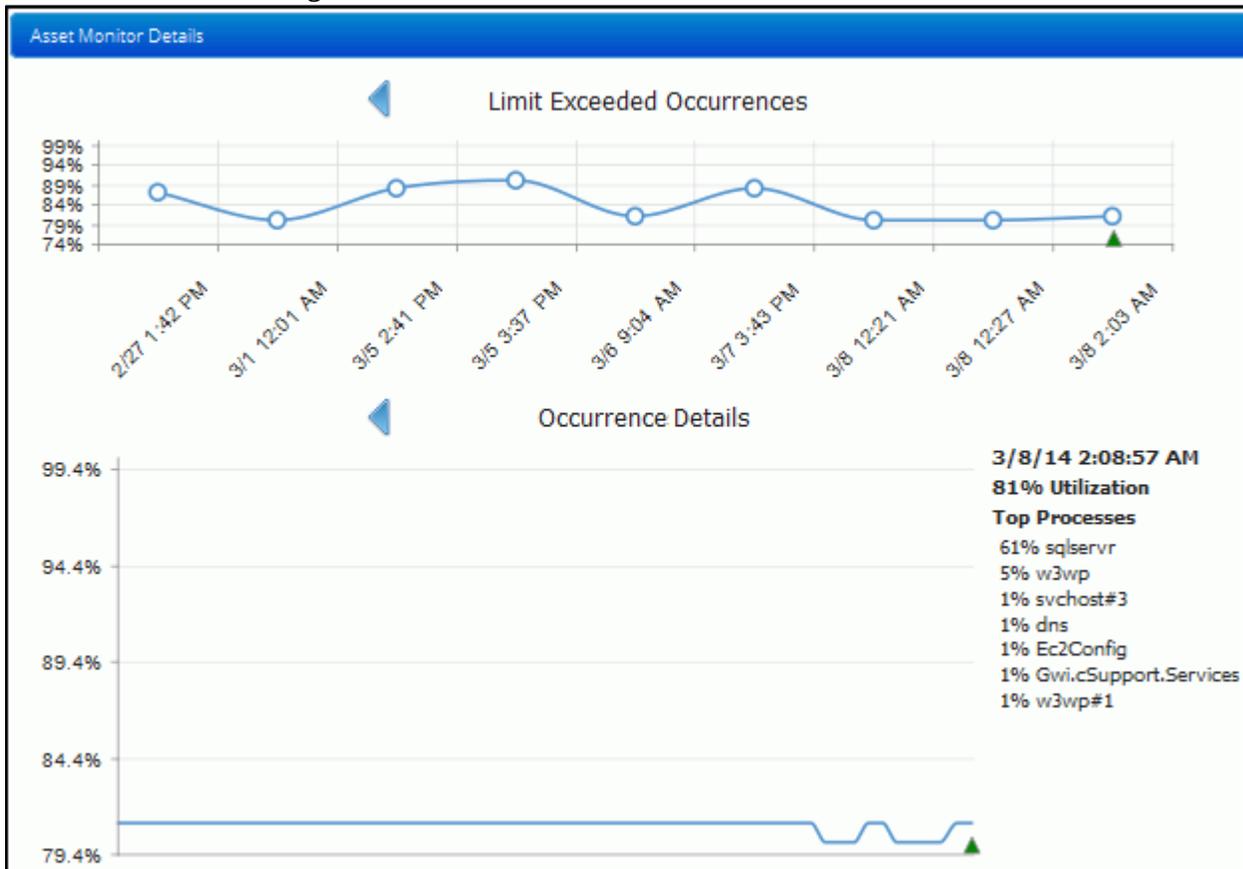
Default Customer: Bob Ryan

An asterisk (*) denotes that the setting only applies to WMI compliant devices.

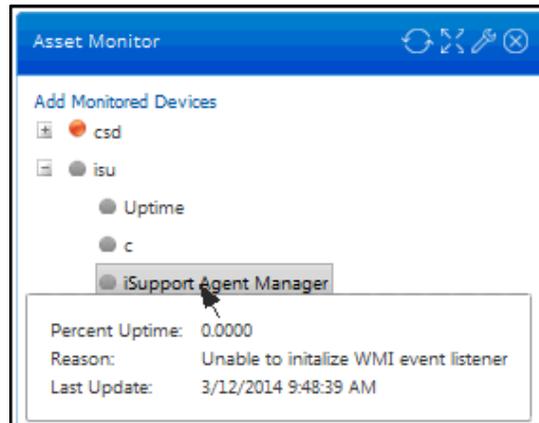
The Memory and CPU options will appear as shown in the example below:



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.

Configuration > Administration Tools > Event Log

Event Log Type: Database Windows

Number of Days Until Auto Purge: 3

Match: All

Date Date and Time: Today

Entry: Contains | email

Search Save

Subscription Settings

Details Schedule Recipients

Format: PDF

Name: Today's Email Event Log Entries

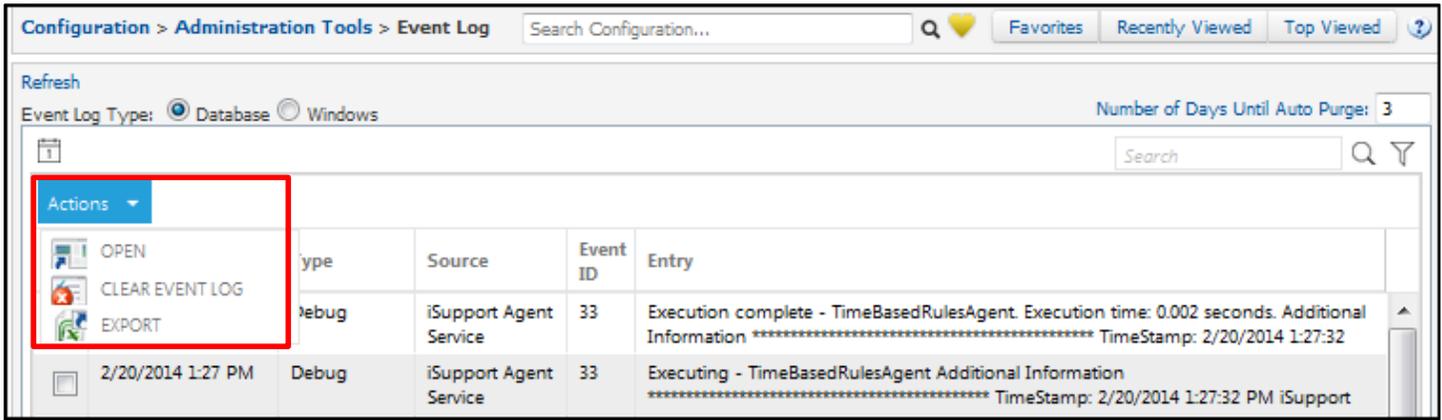
Subject: Today's Email Event Log Entries

Message: Here is a list of the Event Log entries containing the word "email" with today's date.

Close Save

Date Date and Time	Type	Agent Service	Timestamp
2/17/2014 12:36 PM	Debug	iSupport Agent Service	6:59 PM iSupport
2/17/2014 12:36 PM	Debug	iSupport Agent Service	6:47 PM iSupport
2/17/2014 12:36 PM	Debug	iSupport Agent Service	ds. Additional 17/2014 12:36:47
2/17/2014 12:36 PM	Debug	iSupport Agent Service	nds. Additional 17/2014 12:36:01
2/17/2014 12:36 PM	Debug	iSupport Agent Service	s. Additional 17/2014 12:36:01
2/17/2014 12:36 PM	Debug	iSupport Agent Service	6:01 PM iSupport
2/17/2014 12:36 PM	Debug	iSupport Agent Service	6:01 PM iSupport
2/17/2014 12:35 PM	Debug	iSupport Agent Service	timestamp: 2/17/2014 12:35:59 PM iSupport
2/17/2014 12:35 PM	Debug	iSupport Agent Service	5 Entering Scanner Agent. End Scanner Agent. Additional Information ***** TimeStamp: 2/17/2014 12:35:59 PM iSupport
2/17/2014 12:35 PM	Debug	iSupport Agent Service	5 Execution complete - AssetScannerAgent. Execution time: 0.001 seconds. Additional Information ***** TimeStamp: 2/17/2014 12:35:59

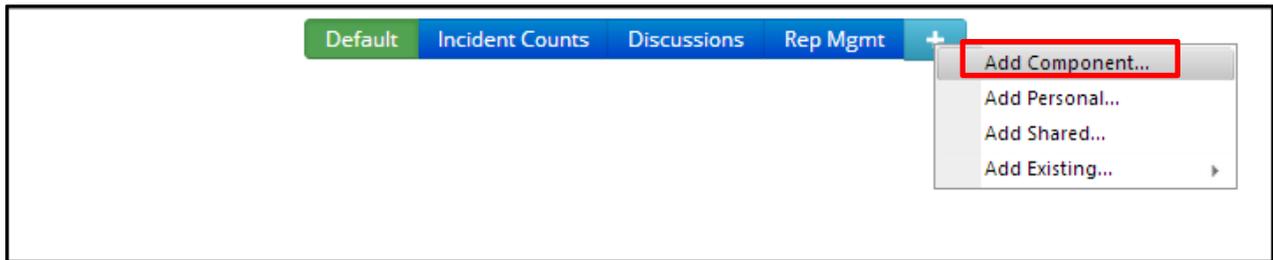
Open, Clear Event Log, and Export view actions are also included.



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.



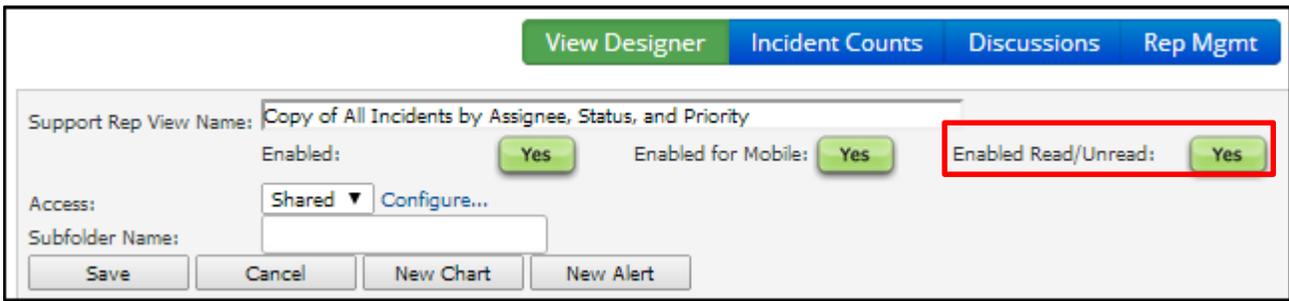
Cloud Monitor Component

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.

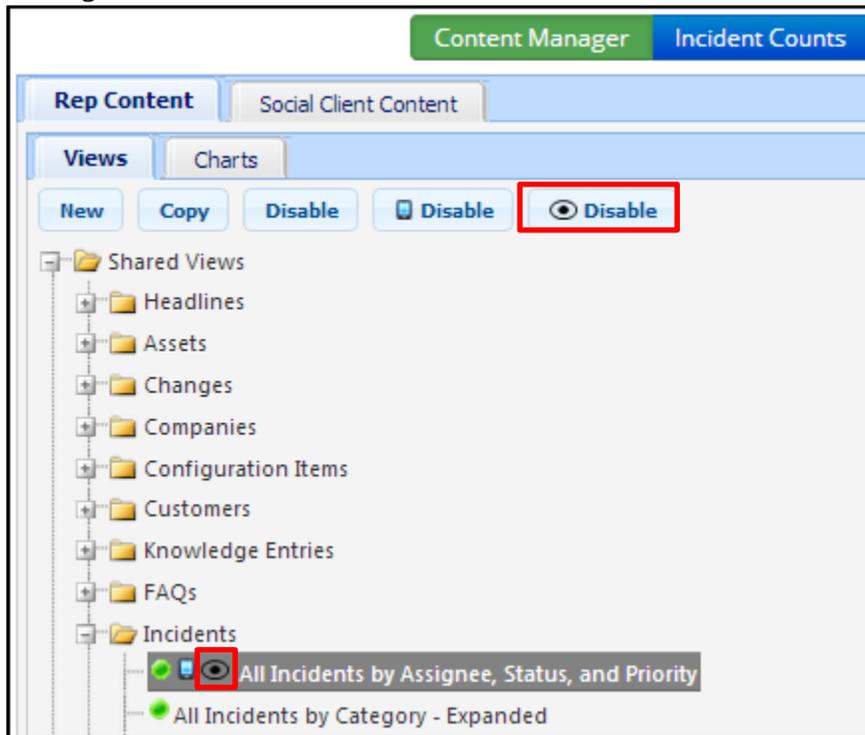
The screenshot shows the 'Cloud Monitor' interface. At the top, it says 'Cost Allocation Reports: aws-cost-allocation-2014-03'. Below this is a table with columns: 'Description', 'Usage Quantity', 'Cost Before Tax', 'Tax Amount', and 'Total Cost'. The table is expanded to show details for 'Amazon Elastic Compute Cloud'. The data is as follows:

Description	Usage Quantity	Cost Before Tax	Tax Amount	Total Cost
Amazon Elastic Compute Cloud				
\$0.364 per M1 Standard Large (m1.large) Windows instance-hour (or partial hour)	206.50	\$75.16	\$6.31	\$81.48
Standard Large Instance (m1.large) Windows instance-hours used this month	206.50	\$0.00	\$0.00	\$0.00
\$0.974 per M1 Standard Large (m1.large) Windows SQL Server Std instance-hour (or partial hour)	413.00	\$402.26	\$33.79	\$436.05
\$0.00 per GB-month of provisioned storage under monthly free tier	4.23	\$0.00	\$0.00	\$0.00
\$0.00 per GB-month of provisioned storage under monthly free tier	0.34	\$0.00	\$0.00	\$0.00
\$0.00 per GB-month of provisioned storage under monthly free tier	0.51	\$0.00	\$0.00	\$0.00
\$0.05 per GB-month of provisioned storage - US West (Oregon)	272.65	\$13.63	\$0.00	\$13.63

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 Enable and Disable 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.

The screenshot shows a software interface with a left sidebar, a central actions menu, and a table of incidents. The sidebar lists assignees and their incident counts, such as 'Copeland, Stuart (1)', 'Flynn, Connor (5)', and 'White, Barry (19)'. The actions menu includes options like 'OPEN', 'NEW INCIDENT', 'DELETE', and 'MARK READ'. The table lists incident details including assignee names and 'Direct Entry' sources. The 'MARK READ' and 'MARK UNREAD' options in the actions menu are highlighted with a red box.

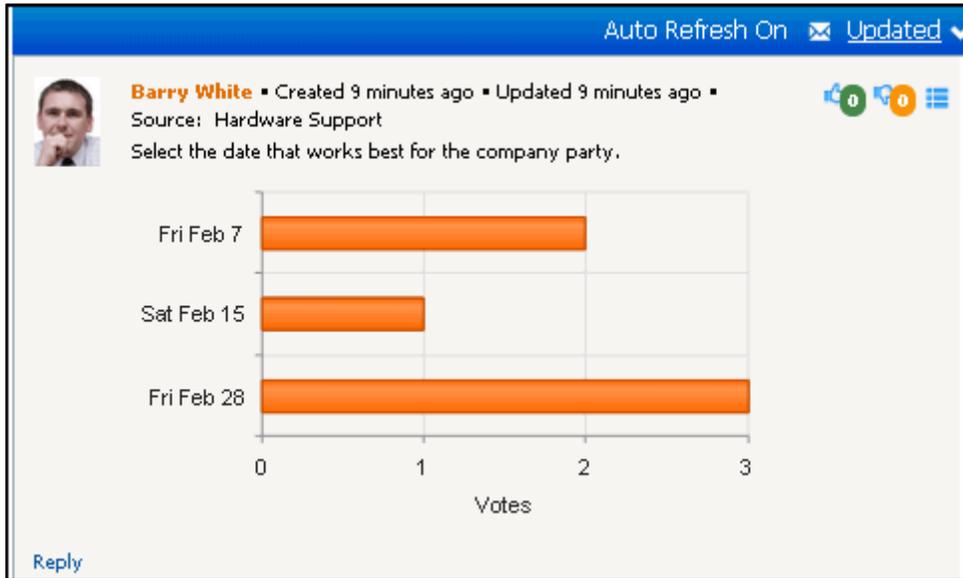
Discussion News Feed Enhancements

Polling

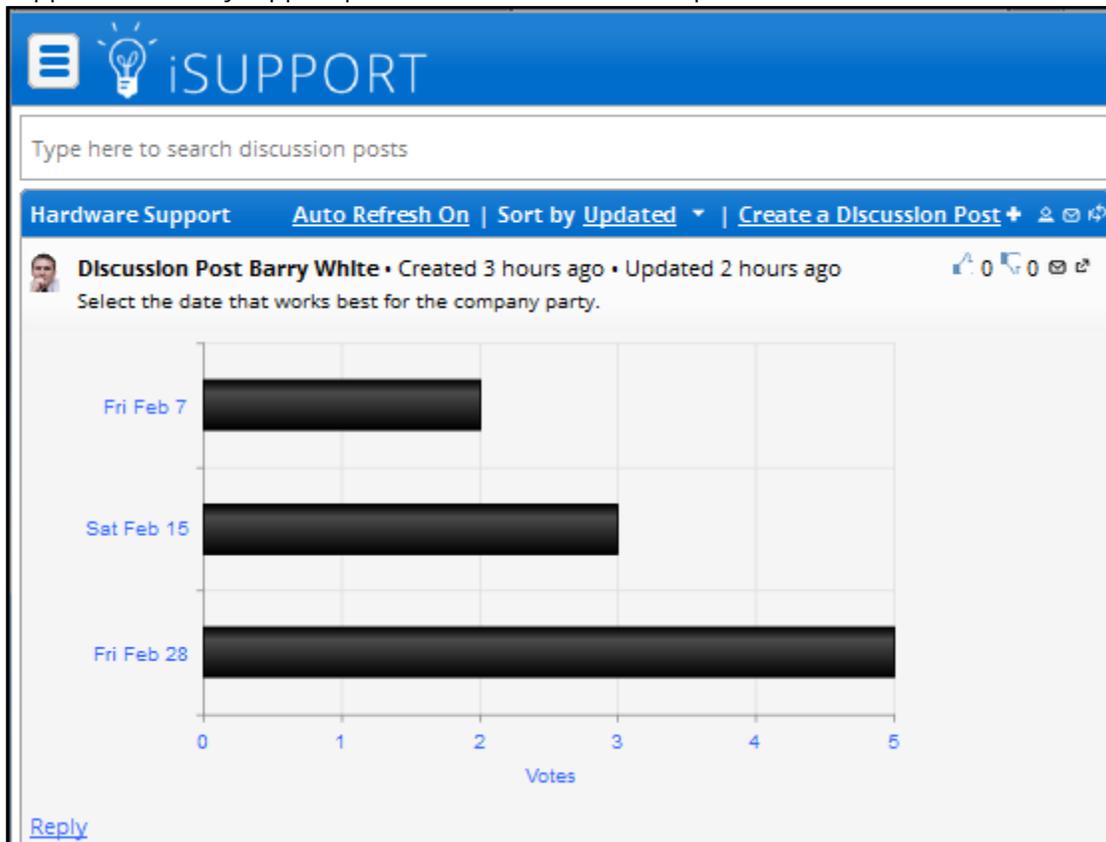
You can now create a poll-type post with radio button response options in discussion-only news feeds on the Desktop and mySupport portal. Poll posts will display only to authenticated users.

The screenshot shows a news feed interface. At the top, there's a 'News Feed' header with a search bar containing 'Hardware Support' and a 'Create New Post' button. Below the search bar is a search input field. The main content area shows a post by 'Barry White' with a profile picture. The post text is 'Select the date that works best for the next company party.' Below the text are three radio button options: 'Fri Feb 7', 'Sat Feb 15', and 'Fri Feb 28'. A 'Vote' button is located below the options. The interface also includes 'Auto Refresh On' and 'Updated' indicators.

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



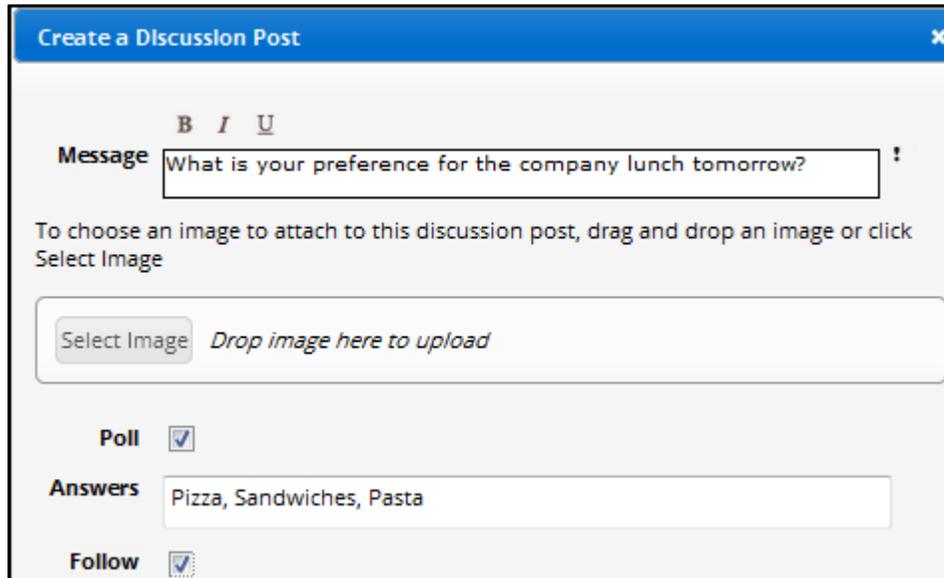
Poll posts will appear on the mySupport portal as shown in the example below:



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.

The screenshot shows the 'Desktop Preferences' dialog box with several tabs: 'Details', 'Desktop Quick Access', 'Classic View', 'Favorite Views', and 'View Subscriptions'. The 'Details' tab is active. It contains the following settings:

- Display Time Zone: (GMT-08:00) Pacific Time (US & Canada)
- To reset your password, enter values below:
 - Current Password: [text input]
 - New Password: [text input]
 - Confirm Password: [text input]
- Text Editor Toolbar: Popup
- Tab key inserts tabbed spaces in text editor fields
- Show Seconds on Countdown: Yes No
- Default for Follow Option on Discussion Posts: Yes No** (highlighted with a red box)

*The Display Time Zone is for display purposes only. Business hour escalation and statistics are

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.

Default for Follow Option on Discussions has been set to "No". You can change this default in Account Settings.

OK

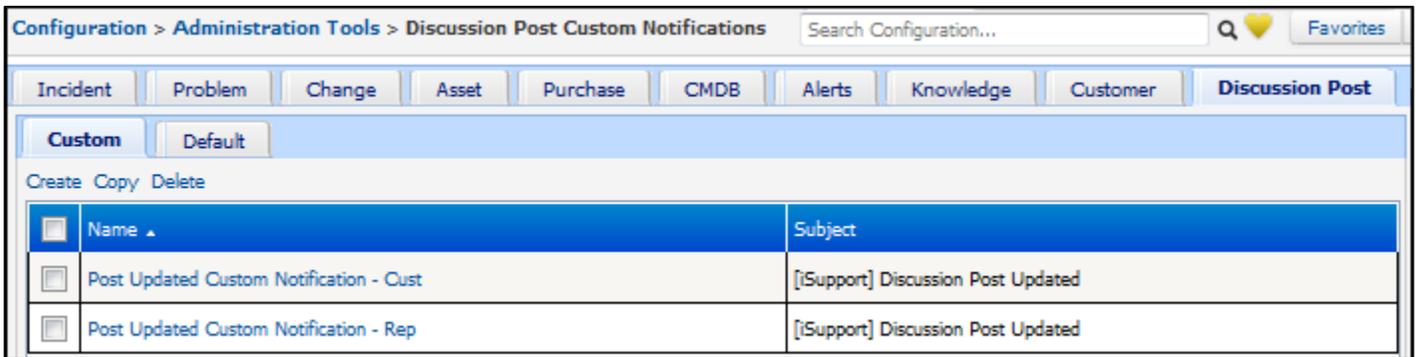
The screenshot shows the 'Account Settings' dialog box with the following sections:

- Avatar
- Password
- Time Zone
- Follow Discussion Posts** (highlighted with a red box)

Set default Follow option on Create Discussion Post and Reply dialog to Yes:

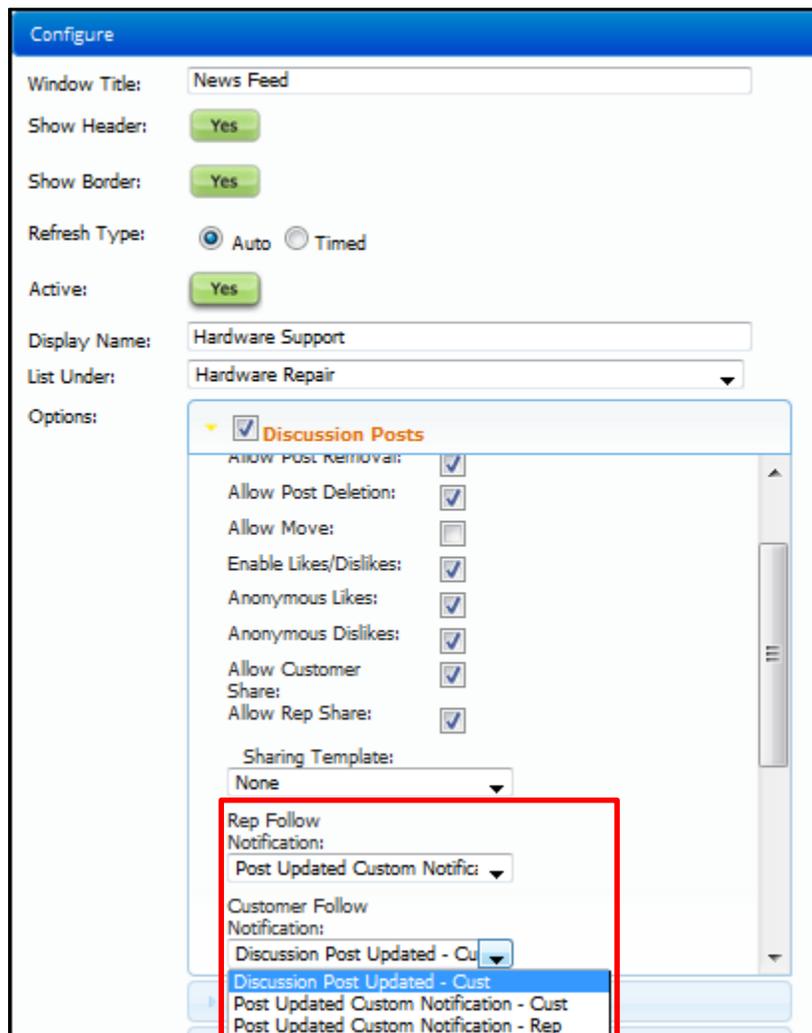
Custom Follow Notifications

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.



Name	Subject
Post Updated Custom Notification - Cust	[Support] Discussion Post Updated
Post Updated Custom Notification - Rep	[Support] Discussion Post 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.



Configure

Window Title: News Feed

Show Header: Yes

Show Border: Yes

Refresh Type: Auto Timed

Active: Yes

Display Name: Hardware Support

List Under: Hardware Repair

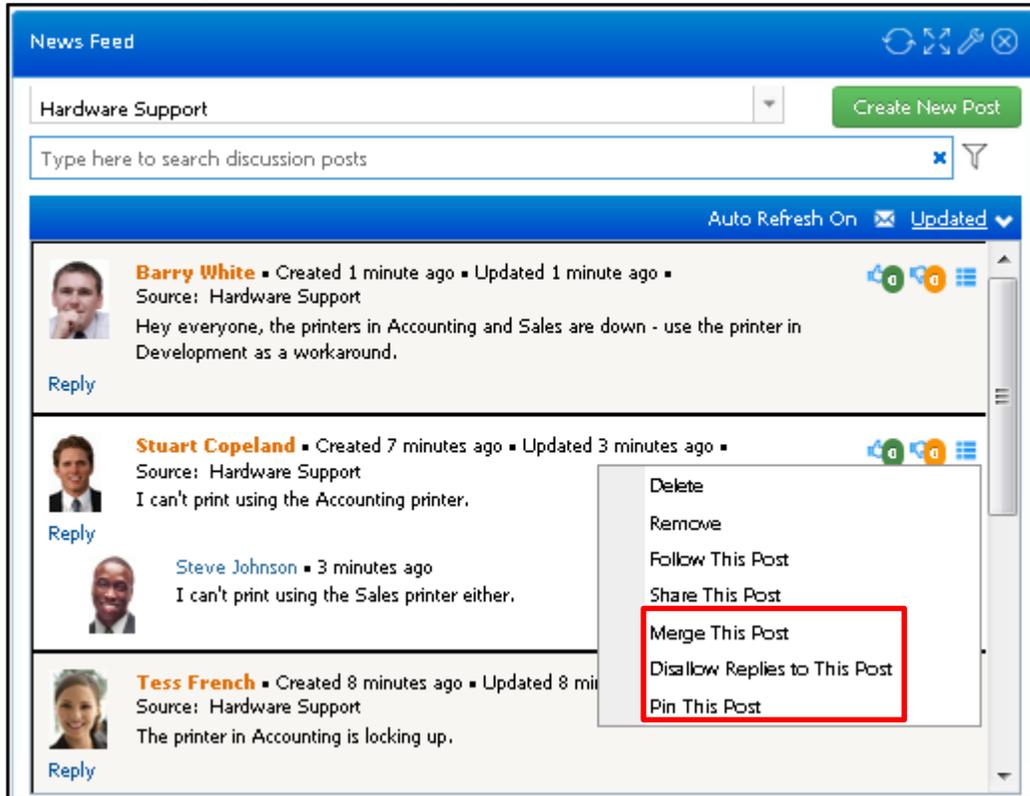
Options:

- Discussion Posts
 - Allow Post Removal:
 - Allow Post Deletion:
 - Allow Move:
 - Enable Likes/Dislikes:
 - Anonymous Likes:
 - Anonymous Dislikes:
 - Allow Customer Share:
 - Allow Rep Share:
 - Sharing Template: None
 - Rep Follow Notification: Post Updated Custom Notific:
 - Customer Follow Notification: Discussion Post Updated - Cu
 - Discussion Post Updated - Cust
 - Post Updated Custom Notification - Cust
 - Post Updated Custom Notification - Rep

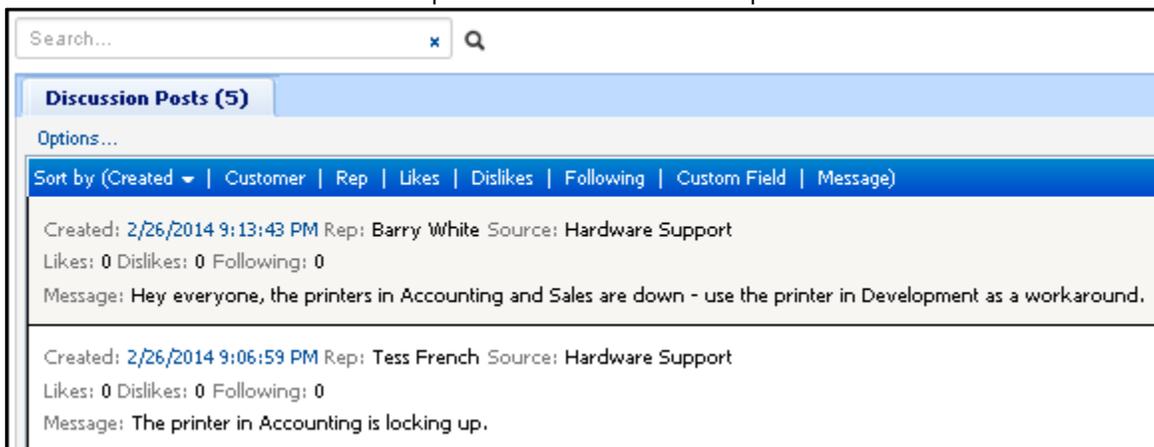
Merging, Preventing Post Replies, and Pinning Posts

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

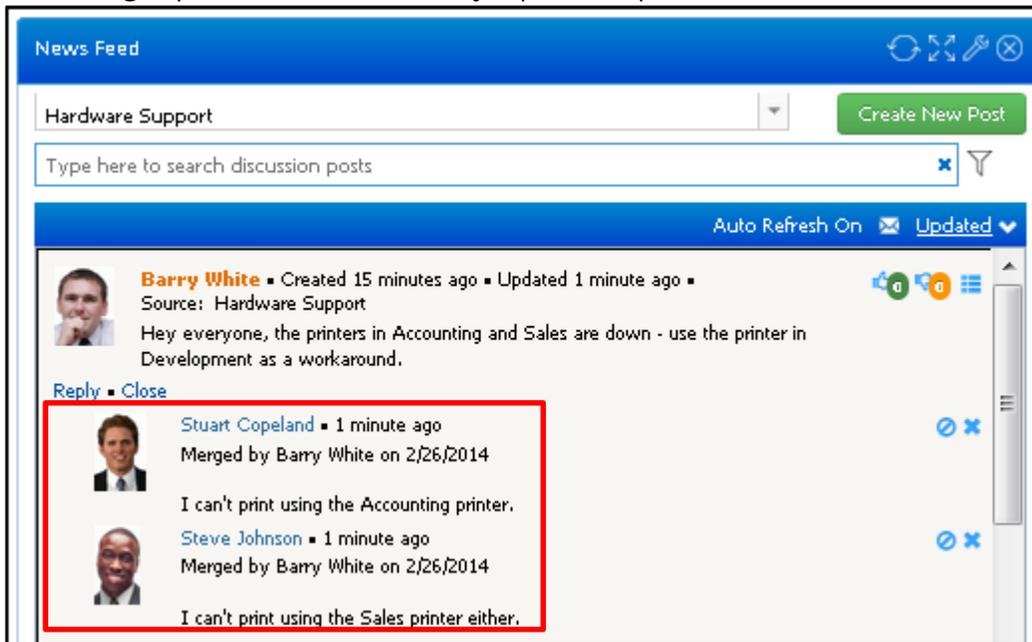
- Disallow Replies to This Post will prevent the Reply link from appearing on a post.
- Merge This Post will move a post under another post.



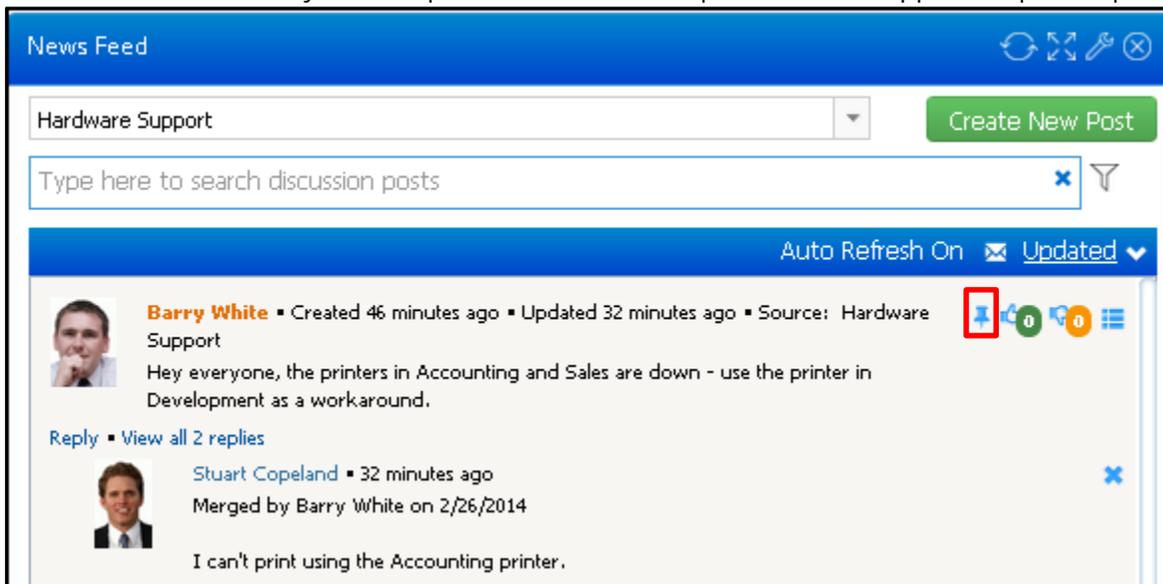
After selecting Merge This Post on the post action menu, a search dialog will appear with other posts in the feed. Click the date/time link to select the post to which the current post should be moved.



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.

Configure

Window Title: News Feed

Show Header: Yes

Show Border: Yes

Refresh Type: Auto Timed

Active: Yes

Display Name: Hardware Support

List Under: Hardware Repair

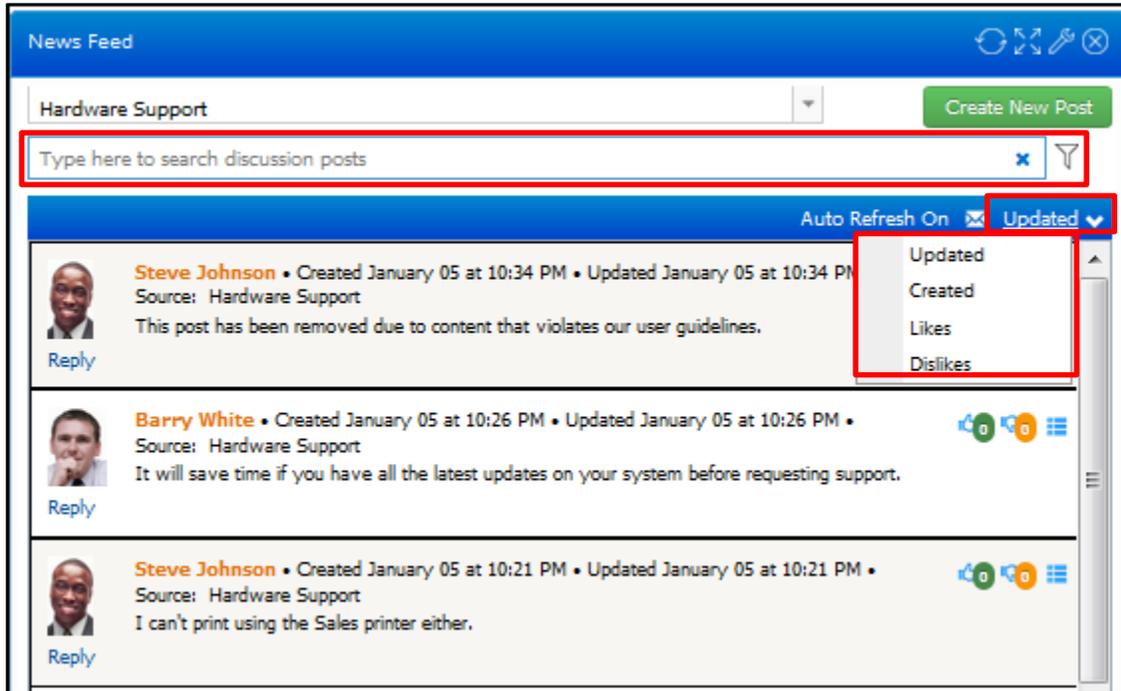
Options:

- Discussion Posts
- Custom Field
- Access**
 - Shared:
 - Restrict: Add Rep Group
 - Hardware Repair
 - Add Rep
 - Stuart Copeland
 - Add Customer Group
 - Customer Groups** **Post Reply**
 - Administrators
 - Add Customer
 - Customer** **Post Reply**
 - Steve Johnson

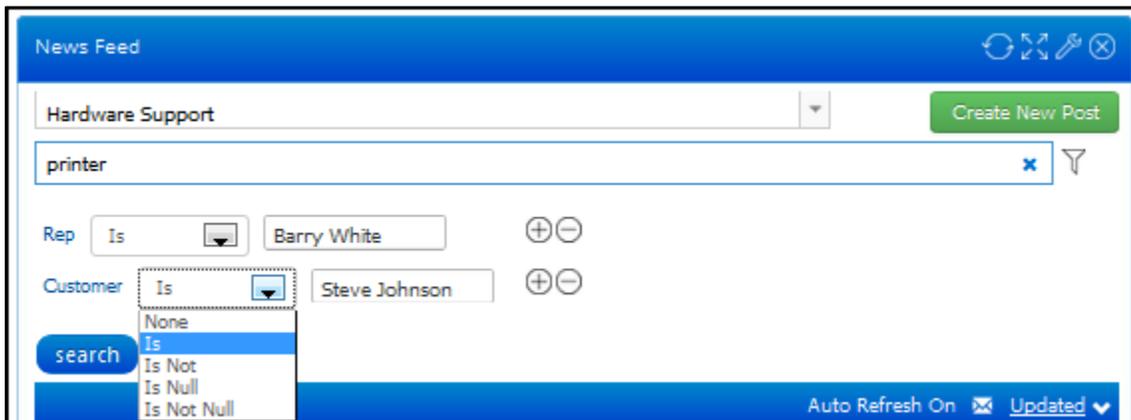
Sorting, Searching, and Customer Profile Click-Through

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

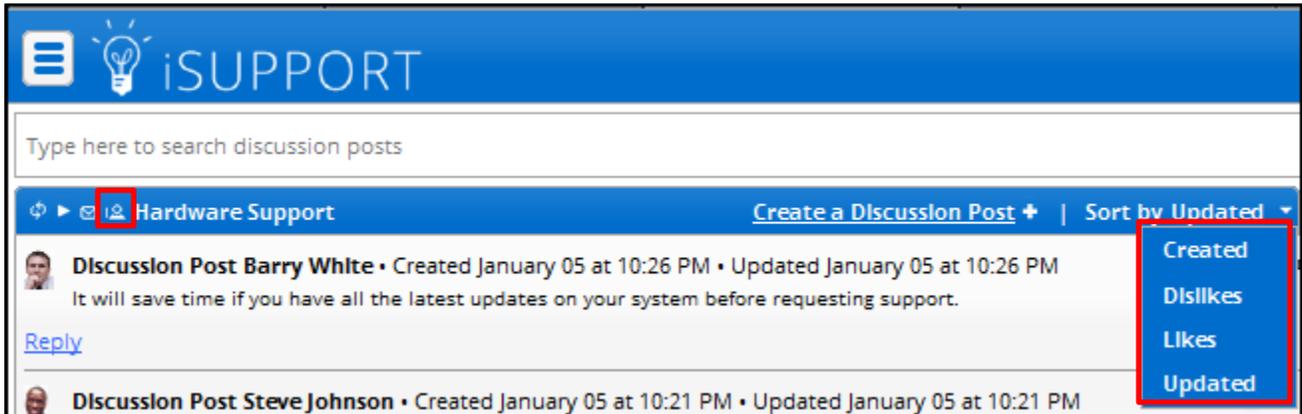
- Sort by last updated date/time, creation date/time, number of likes, and number of dislikes. The creation date and time for originating posts is now included.
- Perform a search



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.



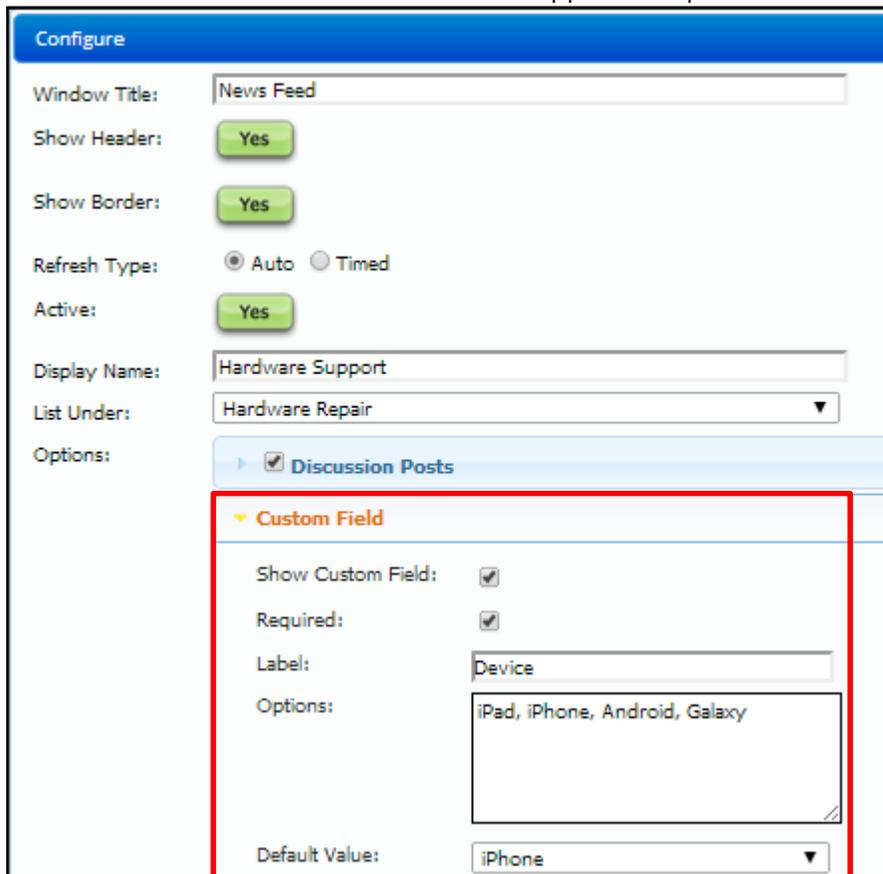
Searching is also available on the mySupport portal, however, filtering is not available. Customers can sort feed entries by last updated date/time, creation date/time, number of likes, and number of dislikes as well. A View My Posts Only  option was added.



- 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

New Discussion Feed Post

Please apply the latest update to your phones.

Device: iPhone

Poll:

Follow this post:

Post Cancel

mySupport Discussion Feed Post

Create a Discussion Post

Message **B I U**

Is anyone else having trouble accessing the WiFi using their phone?

To choose an image to attach to this discussion post, drag and drop an image or click Select Image

Select Image Drop image here to upload

Device Android

Select

iPad

iPhone

Android

Galaxy

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

News Feed

Hardware Support Create New Post

Type here to search discussion posts

Auto Refresh On Updated

Barry White • Created 3 minutes ago • Updated 3 minutes ago • Source: Hardware Support • Device: iPhone

Please apply the latest update to your phones.

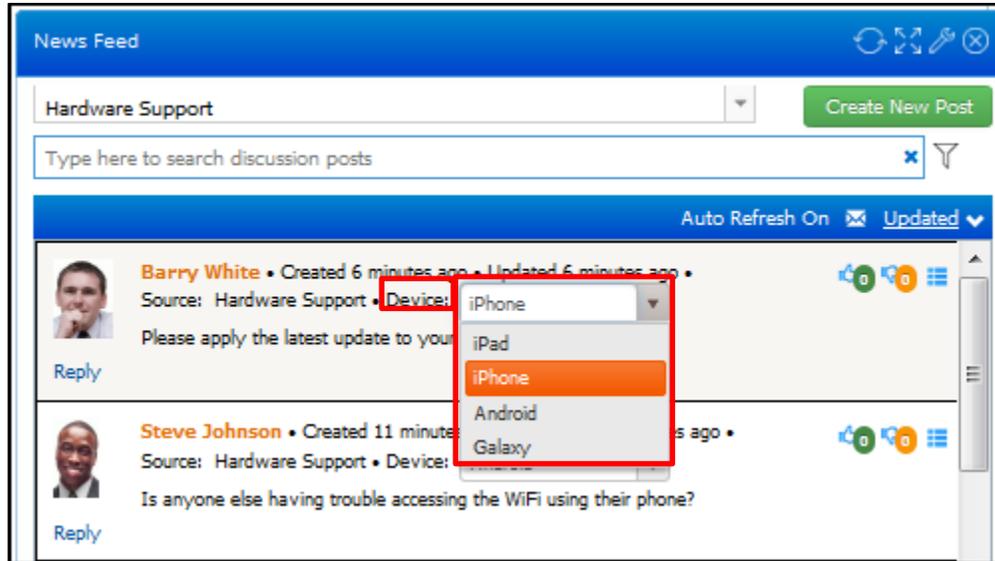
Reply

Steve Johnson • Created 7 minutes ago • Updated 7 minutes ago • Source: Hardware Support • Device: Android

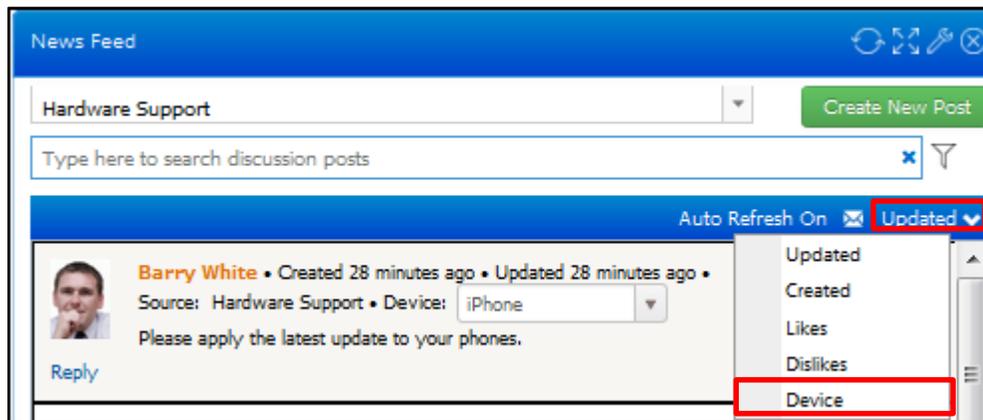
Is anyone else having trouble accessing the WiFi using their phone?

Reply

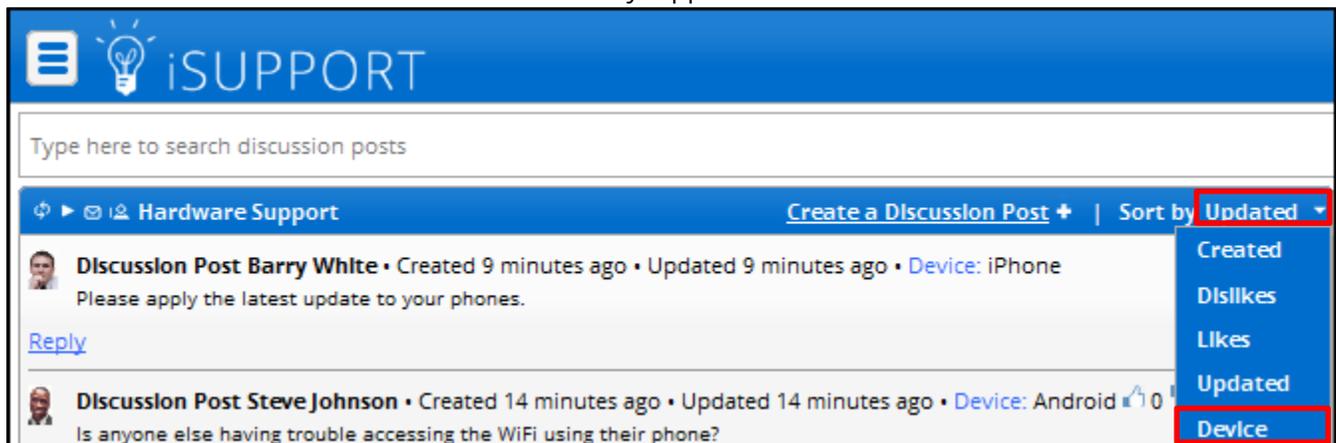
The custom field will appear as follows to support representatives with Discussion Feed Administrator access; another value in the dropdown list can be selected or a different value can be entered.



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

<input type="checkbox"/>	Name	Uri	Date
<input type="checkbox"/>	Google	http://www.google.com	3/15/2014 2:49:39 PM

Add External Link

Name:

Uri:

mySupport work item

iSUPPORT

Category: Number: E3FE112936 Company: LBLSoft

Related Items: Opened: 3/15/2014 Customer: Steve Johnson ⓘ

Description External Links

External Links:

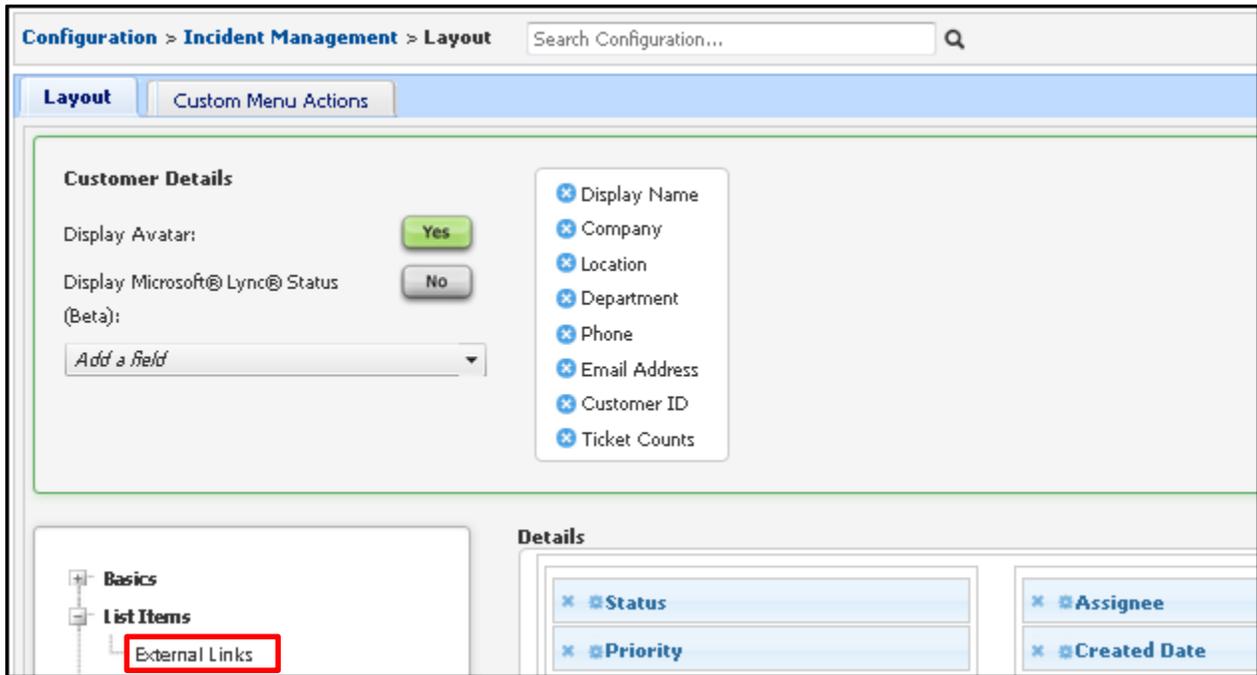
+ Google

Add External Link

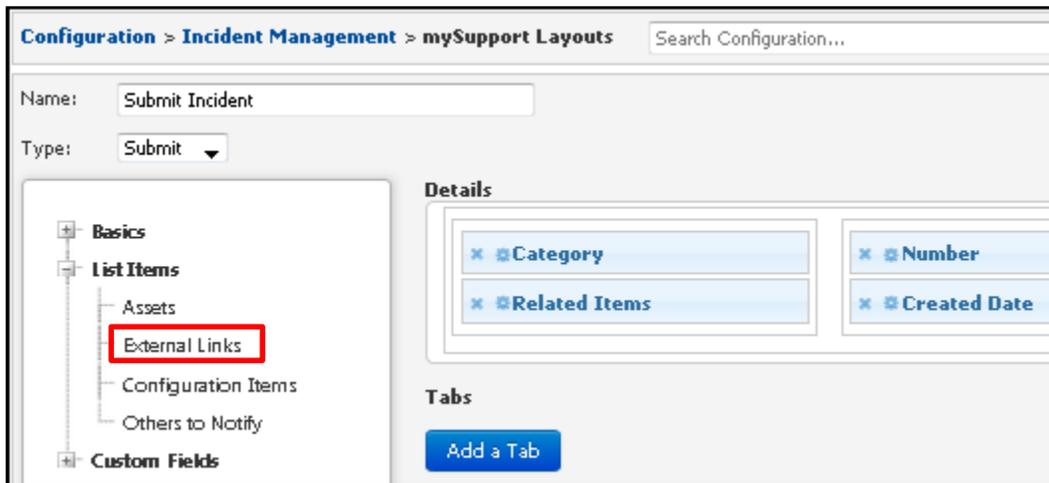
Name:

Uri:

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

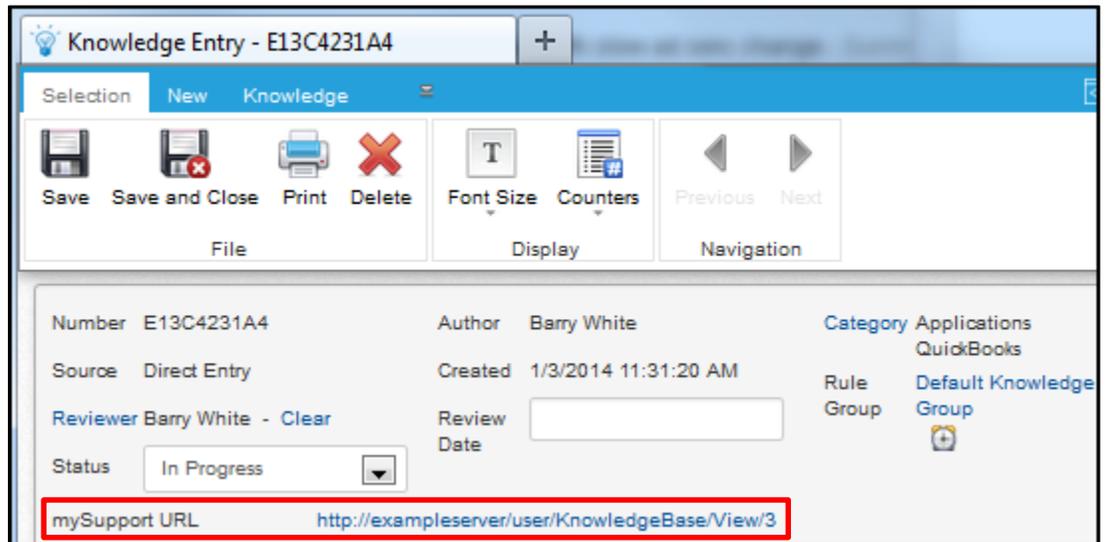
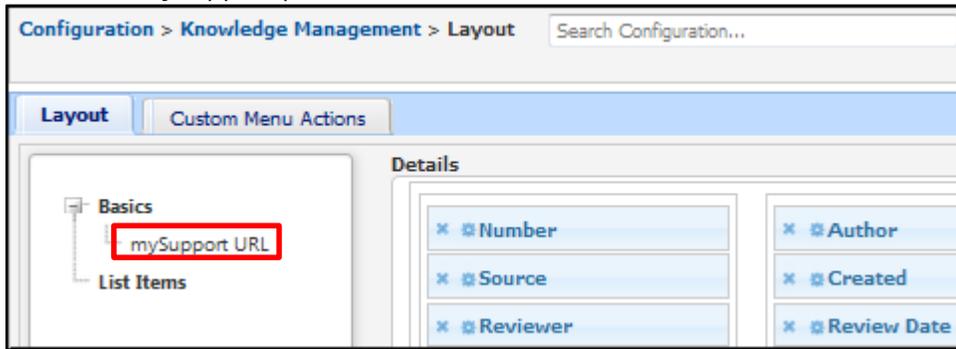


You can add the External Links field to a mySupport work item layout via the Incident, Problem, Change, Purchasing mySupport Layout screens.



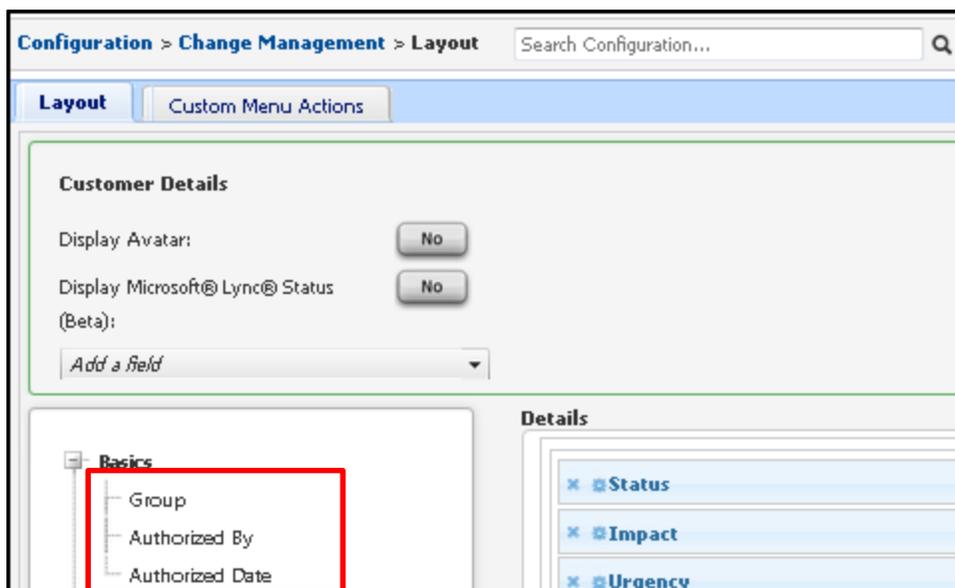
Knowledge Entry Links

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.



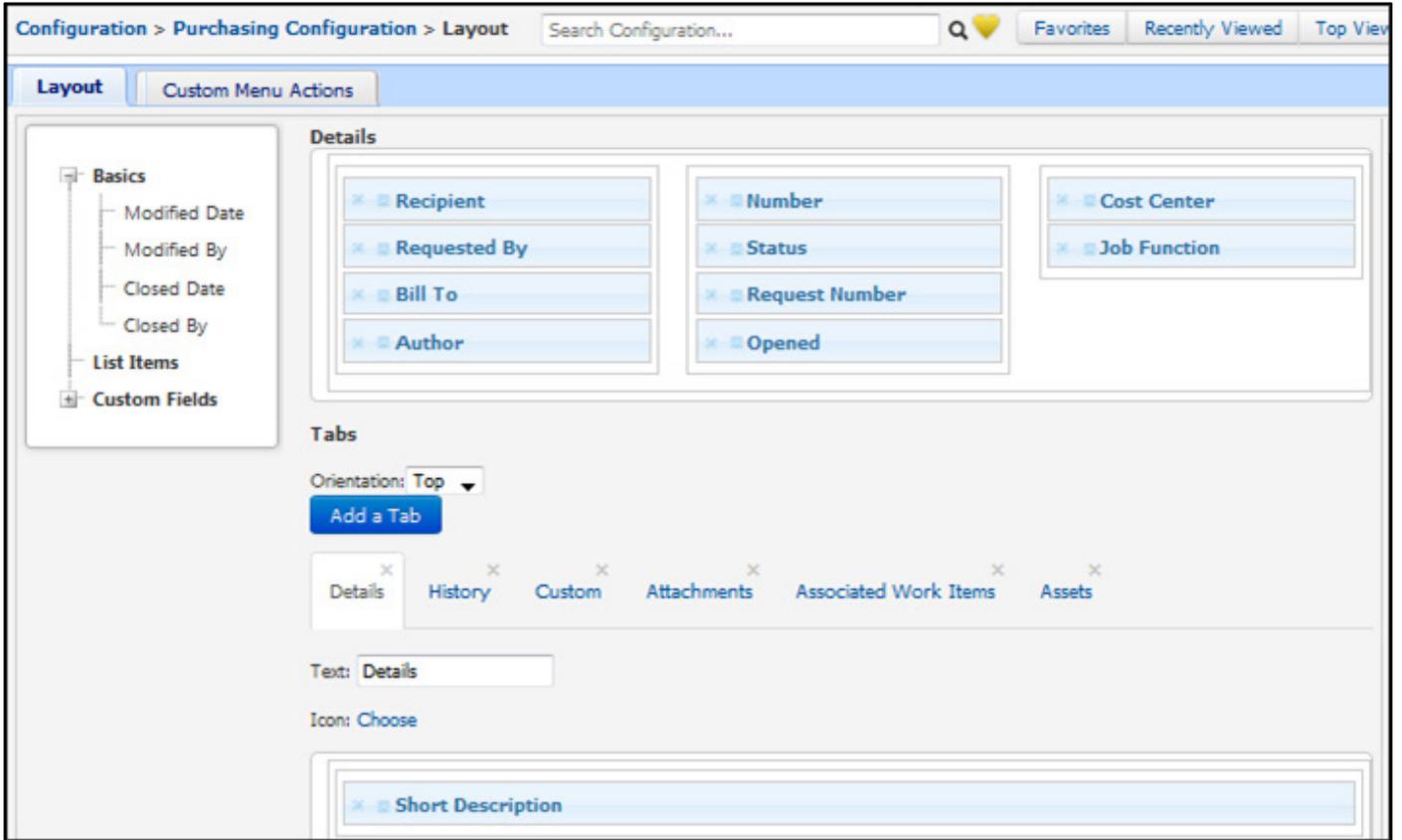
Rep Group, Authorized by, and Authorized Date/Time

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.

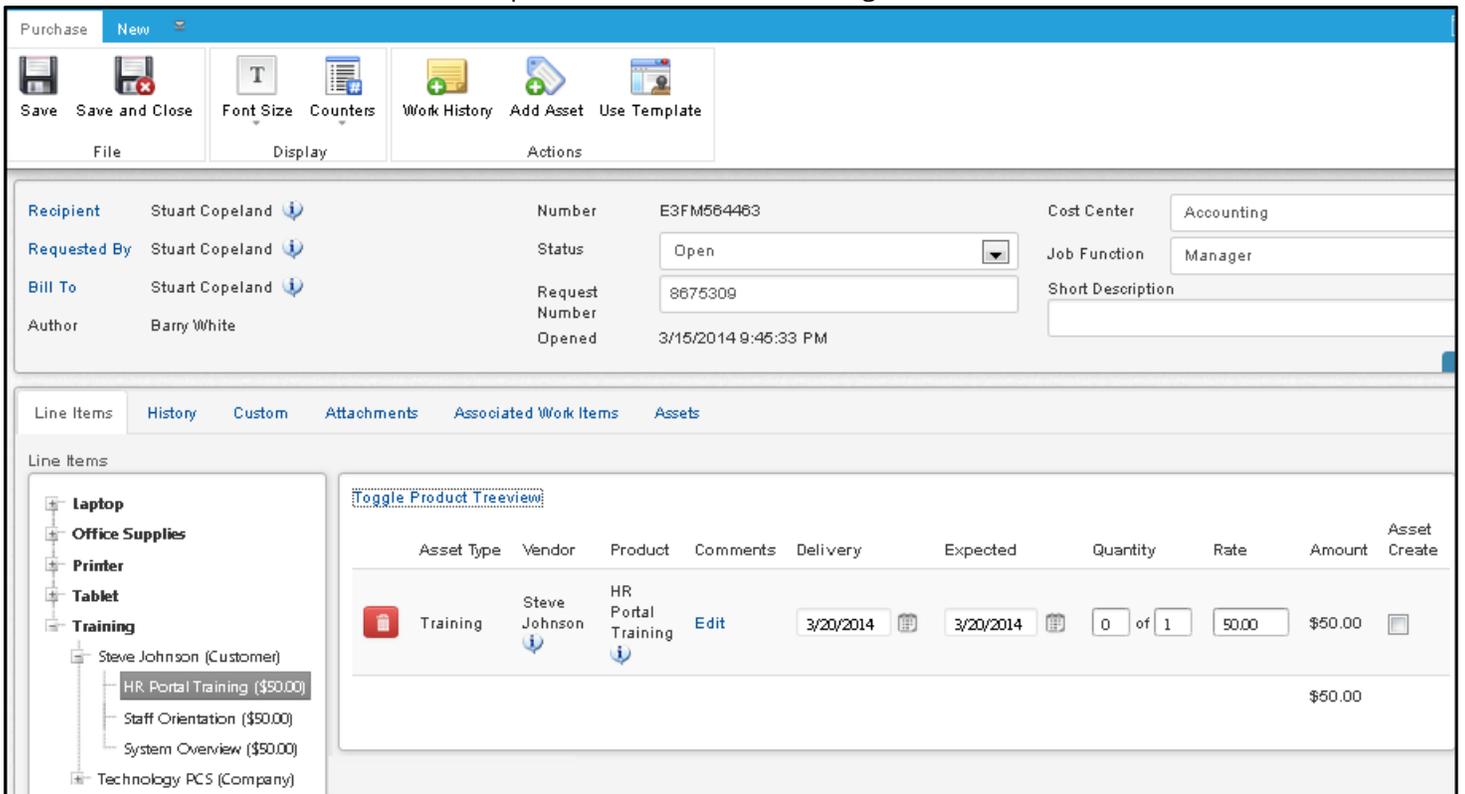


Purchase Request Screen Layout

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.

The screenshot shows the 'Security' configuration page for 'Support Representative Management'. The page has a breadcrumb trail: 'Configuration > Support Representative Management > Security'. A search box is visible in the top right corner. The configuration options are as follows:

- Enable Forgotten Password: Yes
- Enable Password Expiration: Yes
- Expire Password After: Days
- Warn Support Representative: Days Before Expiration
- Enable Previous Password Check: Yes
- Number of Previous Passwords:

Minimum Password Requirements

- Minimum Characters:
- At Least One Special Character: Yes
- At Least One Numeric Character: Yes
- At Least One Uppercase Character: Yes
- At Least One Lowercase Character: Yes

Force Password Reset for All Support Representatives

Login Screen Content:

Use this application only for company business.

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.

Configuration > Support Representative Management > Profiles Search Configuration...

Details Groups Permissions Skills

First Name: Kristin Phone:

Last Name: Simone Fax:

Email Address: ks@gwi.com Cellular:

Pager Email Address: Location:

Display Time Zone: (UTC-08:00) Pacific Time (US & Cana) Support Center:

Login: KS First Rep to Notify:

Password: ***** **Generate New** Second Rep to Notify:

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

iSUPPORT

You must reset your password.

Username Kristin Simone

Password *****

New Password New Password

Confirm Confirm New Password

Reset 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.

iSUPPORT

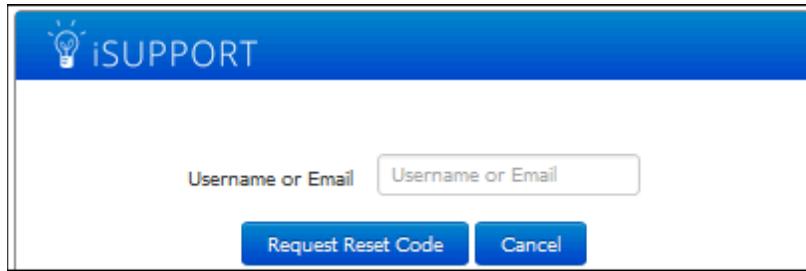
Username Username

Password Password

Login

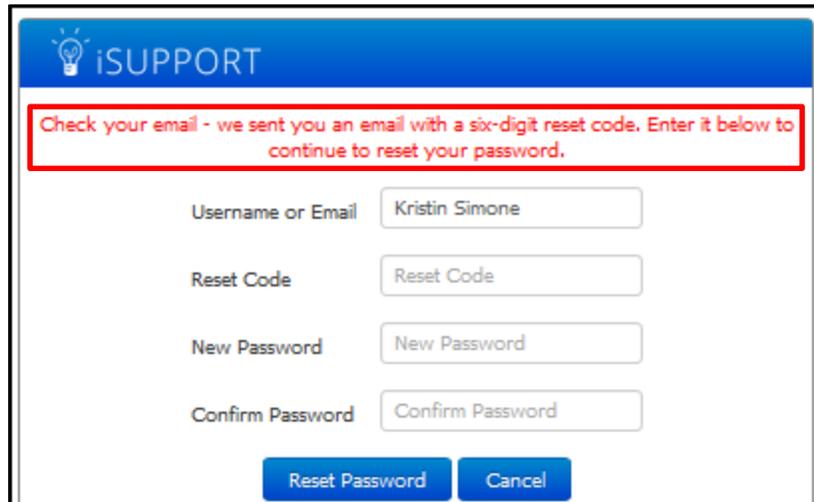
Forgot Password

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



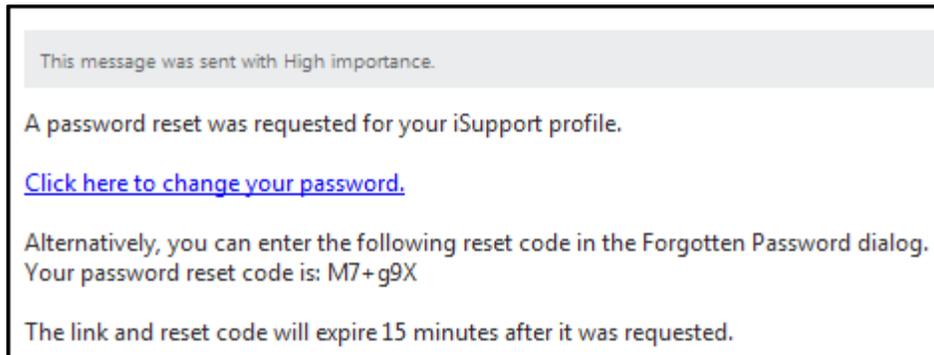
The image shows a dialog box with a blue header containing a lightbulb icon and the text 'iSUPPORT'. Below the header, there is a text input field labeled 'Username or Email' with the placeholder text 'Username or Email'. At the bottom of the dialog, there are two buttons: 'Request Reset Code' and 'Cancel'.

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



The image shows a dialog box with a blue header containing a lightbulb icon and the text 'iSUPPORT'. Below the header, there is a red-bordered box containing the text: 'Check your email - we sent you an email with a six-digit reset code. Enter it below to continue to reset your password.' Below this box, there are four text input fields: 'Username or Email' (containing 'Kristin Simone'), 'Reset Code', 'New Password', and 'Confirm Password'. At the bottom of the dialog, there are two buttons: 'Reset Password' and 'Cancel'.

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.



The image shows an email body with the following text:

This message was sent with High importance.

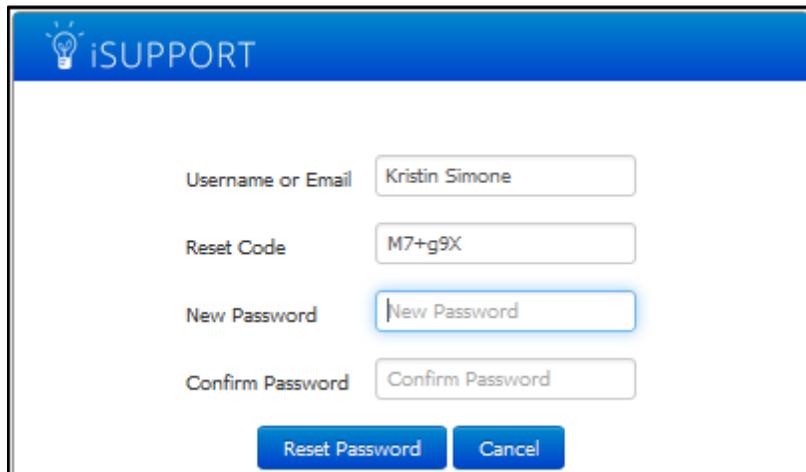
A password reset was requested for your iSupport profile.

[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

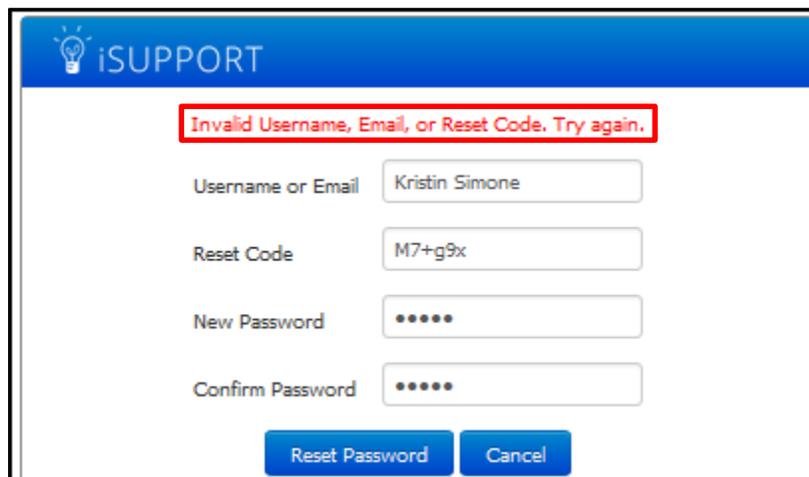
The link and reset code will expire 15 minutes after it was requested.

The following appears when the link is clicked:



The screenshot shows the iSUPPORT password reset interface. At the top is the iSUPPORT logo. Below it are four input fields: 'Username or Email' with the value 'Kristin Simone', 'Reset Code' with the value 'M7+g9X', 'New Password' with the placeholder 'New Password', and 'Confirm Password' with the placeholder 'Confirm Password'. At the bottom are two buttons: 'Reset Password' and 'Cancel'.

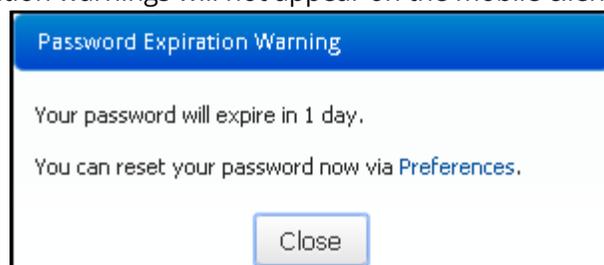
The reset code expires if more than 15 minutes has passed since the password request; the following dialog will appear. The support representative can click Cancel to click the Forgot Password link again, and a new reset code must be configured by the administrator.



The screenshot shows the iSUPPORT password reset interface with an error message. A red box highlights the text 'Invalid Username, Email, or Reset Code. Try again.' above the input fields. The 'Username or Email' field contains 'Kristin Simone', the 'Reset Code' field contains 'M7+g9x', the 'New Password' field contains six dots, and the 'Confirm Password' field contains six dots. The 'Reset Password' and 'Cancel' buttons are at the bottom.

Password Expiration

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.

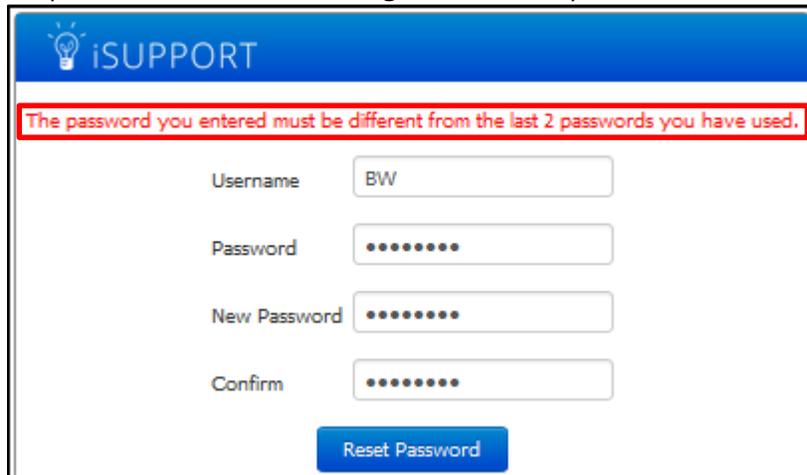


The screenshot shows a 'Password Expiration Warning' dialog box. The title bar is blue with the text 'Password Expiration Warning'. The main content area contains the text 'Your password will expire in 1 day.' and 'You can reset your password now via [Preferences](#).' At the bottom is a 'Close' button.

Previous Password Check

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

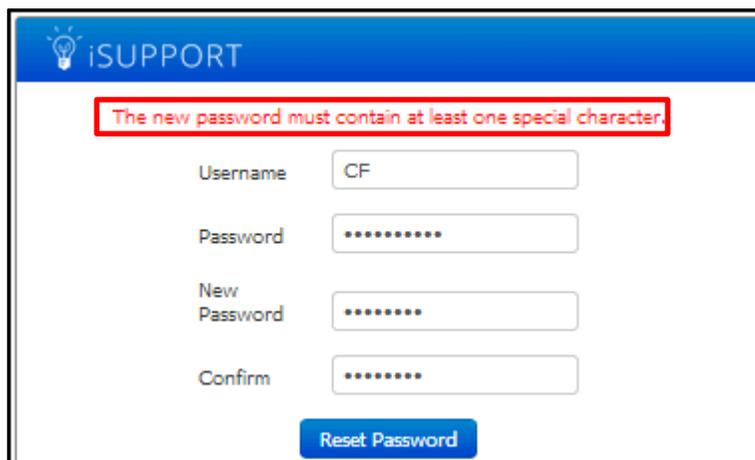
when this feature is initially enabled after you upgrade to version 12.7, a support representative's current password will not be used in the list of passwords to be checked against the new password.



The screenshot shows the iSUPPORT password reset interface. At the top, there is a blue header with the iSUPPORT logo. Below the header, a red-bordered box contains the error message: "The password you entered must be different from the last 2 passwords you have used." The form includes four input fields: "Username" with the value "BW", "Password" (masked with dots), "New Password" (masked with dots), and "Confirm" (masked with dots). A blue "Reset Password" button is located at the bottom of the form.

Minimum Requirements

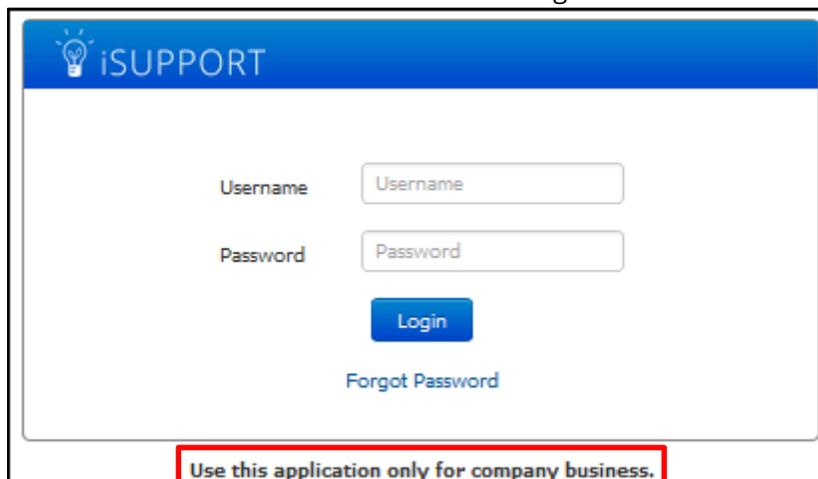
You can require new passwords to contain at least one special character, numeric character, uppercase character, and lowercase character, as well as a minimum number of characters. If a support representative tries to enter a password without the minimum requirements, a message will appear with the missing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



The screenshot shows the iSUPPORT password reset interface. At the top, there is a blue header with the iSUPPORT logo. Below the header, a red-bordered box contains the error message: "The new password must contain at least one special character." The form includes four input fields: "Username" with the value "CF", "Password" (masked with dots), "New Password" (masked with dots), and "Confirm" (masked with dots). A blue "Reset Password" button is located at the bottom of the form.

Login Screen Content

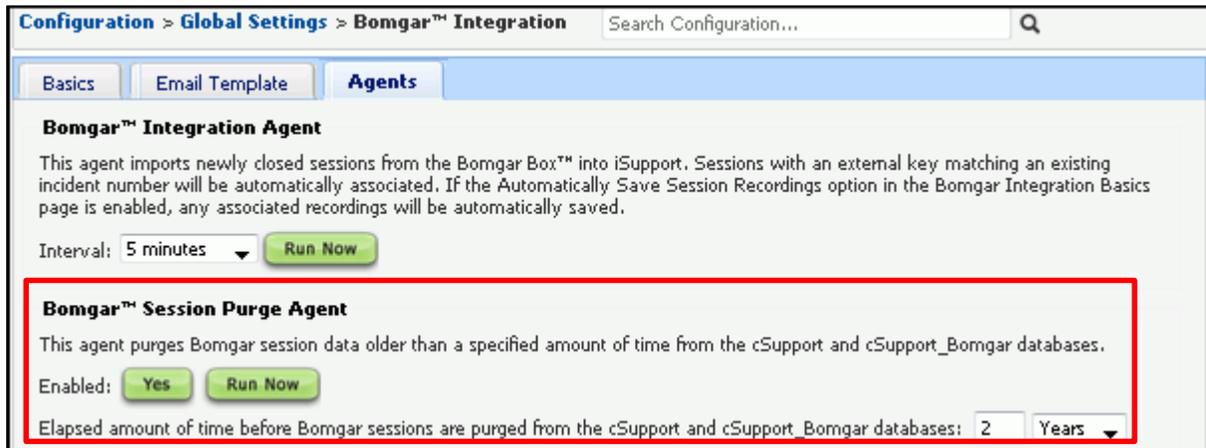
Use the Login Screen Content field to include formatted text and images at the bottom of the login dialog.



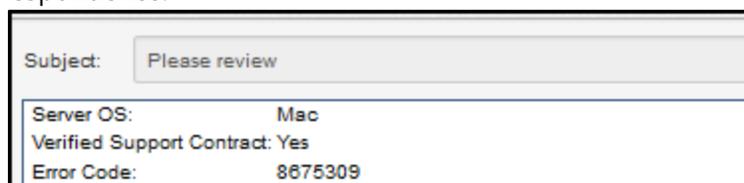
The screenshot shows the iSUPPORT login interface. At the top, there is a blue header with the iSUPPORT logo. Below the header, there are two input fields: "Username" with the placeholder text "Username" and "Password" with the placeholder text "Password". A blue "Login" button is positioned below the password field. Below the "Login" button, there is a link for "Forgot Password". At the bottom of the form, a red-bordered box contains the custom message: "Use this application only for company business."

Miscellaneous

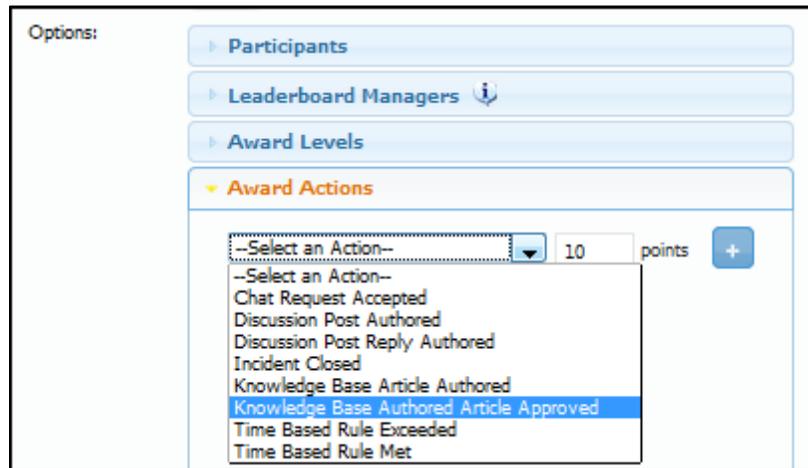
- If you add an existing work item to a hierarchy of work items, a prompt will appear for copying any custom values from the parent work item.
- Archive agent settings have been removed from the Incident Basics configuration screen. (These settings remain in the Administration Tools | Agents screen.)
- 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.