



iSupport® Asset User's Guide

July 2010

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Portions of iSupport are derived from works created by the following companies:

- Licensing functionality from Xheo (www.xheo.com)
- Spell-check functionality from Keyoti Inc (www.keyoti.com)
- HTML parsing functionality from HTML Agility Pack by Simon Mourier (simonm@microsoft.com)
- Text Editor toolbar functionality from Telerik (www.telerik.com)

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1 Introduction

iSupport® Asset helps you perform help desk functions such as setting up customers, companies, assets, and software license profiles. You can also generate reports on iSupport Asset data. Administrators can enable and configure all of the features in the application.

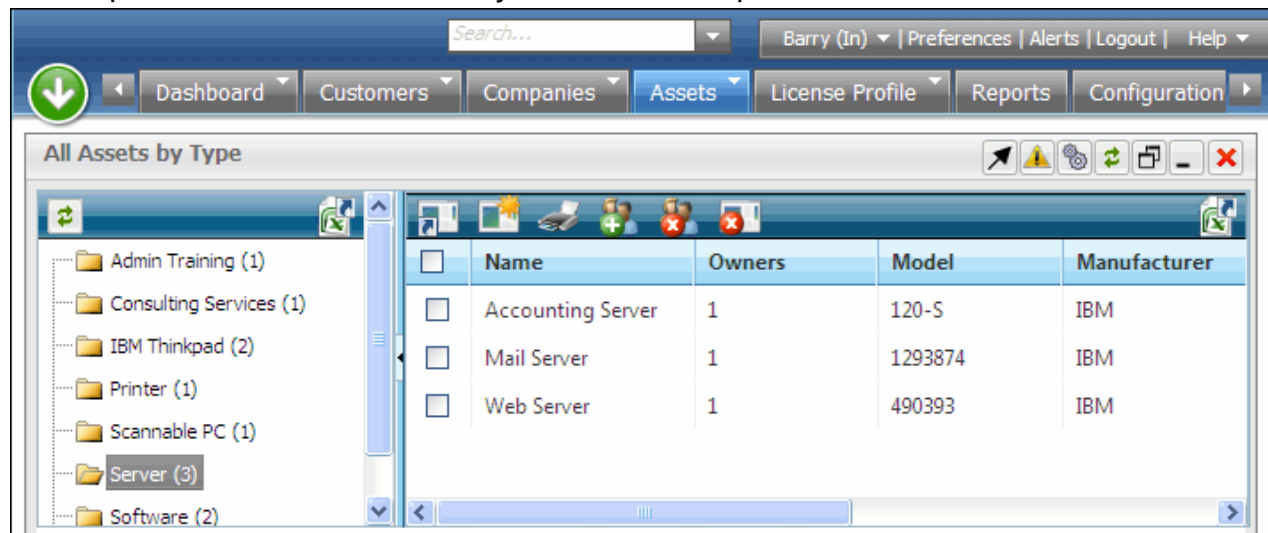
iSupport Asset Documentation

This guide contains information on entering and viewing customer profiles, companies, assets, software license profiles in the iSupport Asset application. The *iSupport Asset Administrator's Guide* provides information on enabling and setting up all iSupport Asset functionality, and the *iSupport Asset Installation Guide* contains information on how to install the product. Access the *iSupport Asset Administrator's Guide* via the Desktop Help menu.

Documentation guides are published in PDF format. Use Adobe Acrobat® Reader™ to view PDFs; to download a free copy of Adobe Acrobat® Reader™, go to www.adobe.com.

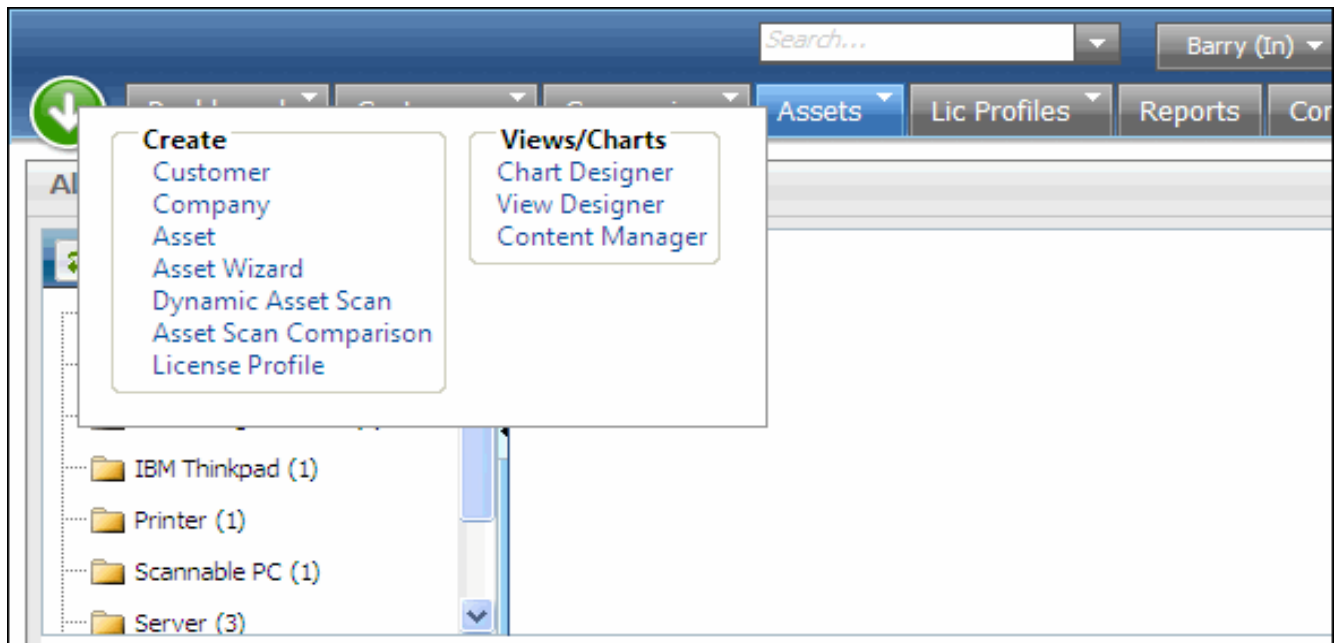
The Desktop

The Desktop contains customizable views and tabs, global search, alerts, and links for logging out and specifying availability. To access all iSupport Asset functionality on the Desktop, use Microsoft® Internet Explorer® 7 or 8, Mozilla® Firefox® 3.5, Google™ Chrome 3.0, or Apple® Safari® 4.0. The URL is: `http://<server>/<virtual directory in which Desktop is installed>/`



You can add URLs, RSS feeds, reports, weather, and views and reports of iSupport Asset data to your Desktop tabs. You can also create a To Do list. Selected view data can also be converted into formats such as Microsoft Excel.

Use the action menu to access iSupport Asset entry screens and other features.



If you are set up as administrator in your Support Representative record, the Configuration option appears in the function bar on the upper right corner of the Desktop for configuring all iSupport Asset functionality. You can set an option in Preferences to retain the Configuration tab on your Desktop. These options enable administrators to configure all iSupport Asset functionality and view configured options and data.

Configuration



Administration

This section contains options central to configuring and monitoring iSupport functionality.

[Agents](#), [Diagnostics](#), [Event Log](#), [Global Configuration](#)



Asset Management

iSupport's Asset functionality enables you to collect and record information about any type of item. This information can be associated with incidents, problems, changes, and customers.

[Custom Fields](#), [Groups](#), [Integration](#), [Inventory Scan Definitions](#), [Scan Maintenance](#), [Types](#)



Custom Notifications

iSupport's Notification functionality enables you to customize text and recipients for iSupport event notifications. You can also create correspondence templates for the Incident, Problem, Change, Configuration Item, Customer Profile, Service Contract, and Purchase Request screens.

[Alert Custom Notifications](#), [Asset Custom Notifications](#), [Correspondence Templates](#)



Customer Management

iSupport's Customer functionality enables you to set up a Customer database, pull this data into Asset, Change, Incident, and Problem records, and communicate with your customers.

[Custom Fields](#), [Directory Integration](#), [Groups](#)



Support Representatives

Set up a Support Representative Profile record for every person using iSupport. You can create groups, locations, and support centers for use in routing and permissions functionality.

[Groups](#), [Licensed Sessions](#), [Locations](#), [Permissions](#), [Profiles](#), [Support Centers](#), [Tabs](#)

For more information on the Desktop, see [“Using the Desktop”](#) on page 17.

Options Available on the Desktop

Tracking Customers

Use the Customer Profile screen to store contact, login, and company information for customers.

The screenshot shows the iSupport Customer Profile screen. At the top, there is a navigation bar with 'Selection', 'New', and 'Find' dropdown menus, and the 'iSupport' logo. Below the navigation bar is a toolbar with icons for file operations. The main form area contains fields for 'First Name' (Steve), 'Last Name' (Johnson), 'Email' (sj@lblsoft.com), 'Phone' (360-397-1004), and 'Company' (LBLSoft, Inc.). To the right of these fields is an 'Avatar' section with a photo of a man and 'Add Remove' links. Below the main form is a tabbed interface with tabs for 'Details', 'Address', 'History', 'Groups', 'Others to Notify', 'Assets', 'Custom Fields', 'Attachments', and 'Miscellaneous'. The 'Details' tab is active, showing fields for 'Customer ID' (8675309), 'Title' (Accounting Manager), 'Fax' (360-397-1007), 'Cellular' (360-397-1000), 'Location' (Headquarters), 'Manager' (John Collins), and 'Department' (Administration). To the right of these fields is an 'Additional Email Addresses' section with a text area containing 'sjohnson@lblsvc.com' and 'Add Remove' links.

Selection	New	Find	iSupport
-----------	-----	------	----------


First Name:

Last Name:

Email:

Phone:

Company:

Avatar:  [Add](#) [Remove](#)

Details | Address | History | Groups | Others to Notify | Assets | Custom Fields | Attachments | Miscellaneous

Customer ID:

Title:

Fax:

Cellular:

Location:

Manager:

Department:

Additional Email Addresses: [Add](#) [Remove](#)

Tracking Companies

Use the Company screen to record the following for a company: primary customer, identification and address information, custom fields, associated groups, others to notify, and miscellaneous information such as comments to display when a customer of the company is selected.

The screenshot shows the iSupport Company screen. At the top, there is a navigation bar with 'Selection', 'New', and 'Find' dropdown menus, and the 'iSupport' logo. Below the navigation bar is a toolbar with icons for file operations. The main form area contains fields for 'Company Name' (LBLSoft, Inc.) and 'Primary Customer' (Steve Johnson). Below these fields is a tabbed interface with tabs for 'Details', 'Address', 'History', 'Groups', 'Others to Notify', 'Assets', 'Custom Fields', 'Attachments', and 'Miscellaneous'. The 'Details' tab is active, showing fields for 'Company Number' (6544), 'Region' (North), 'Phone' (360-397-1000), 'Industry' (Technology), and 'Company Location' (Northwest Division).

Selection	New	Find	iSupport
-----------	-----	------	----------

Company Name:

Primary Customer:

Details | Address | History | Groups | Others to Notify | Assets | Custom Fields | Attachments | Miscellaneous

Company Number:

Region:

Phone:

Industry:

Company Location:

Tracking Assets

You can **record information about assets** such as computers, printers, and communication equipment. This information can be associated with a customer.

In addition to identification numbers and purchase, warranty, and maintenance information, asset types can be used for sorting assets for reporting purposes. Notifications can be configured to be sent before warranty and maintenance expiration dates.

You can scan system details on customer PCs running Microsoft Windows® 98 and above (or any other WMI-compliant machine) as well as non-Windows devices on your local subnet. You can also directly enter details about assets that cannot be scanned. Warranty and maintenance contract details can be tracked.

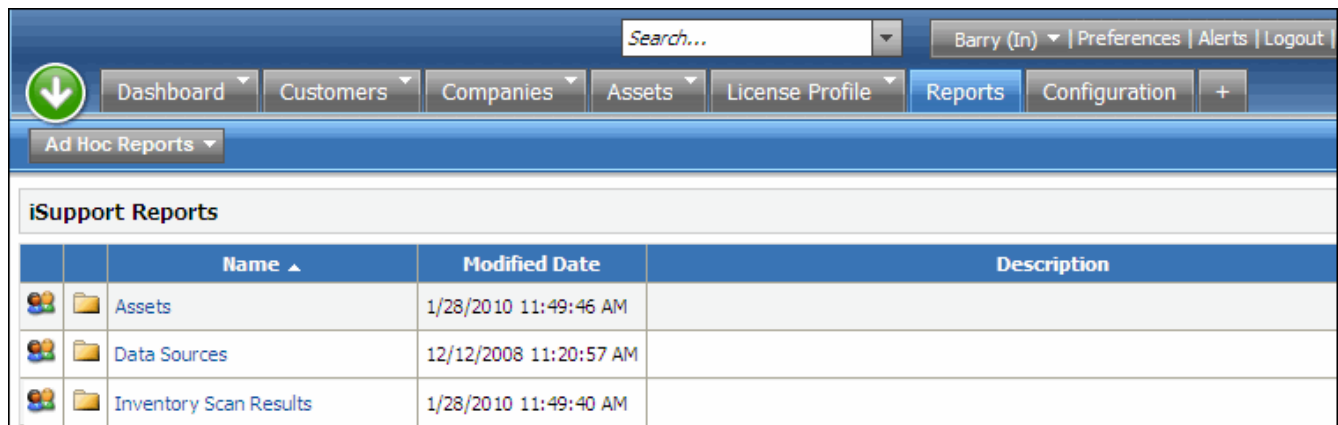
The screenshot displays the iSupport application interface. At the top, there is a header bar with 'Selection' and 'New' dropdown menus, and the 'iSupport' logo on the right. Below the header, there is a toolbar with icons for file operations and a search function. The main form area contains the following fields and sections:




- Name:** BW Laptop
- Type:** IBM Thinkpad
- Source:** Direct Entry
- Tabs:** Details (selected), Owners, Custom Fields, Groups, Attachments, Dynamic Asset Scans
- Inventory Asset Scans:** A sub-section header.
- Model:** Thinkpad
- Manufacturer:** IBM
- Tag Number:** C8484
- Serial Number:** 10293-20394-2039
- Location:** Accounting Department
- Purchase Date:** 10/1/2009
- Maintenance Expiration Date:** 1/22/2011
- Warranty Expiration Date:** 1/12/2011
- Comments:** A text area containing the text 'Replaced motherboard on 10/10/2009'.

Reporting

Use the Reports feature to generate reports of iSupport Asset data for a specified timeframe. If you have Report Viewer permissions in iSupport Asset, you can view SQL reports on the Desktop via the Reports tab or a Report Viewer frame. Reports in the cSupport/Reports folder on the report server will be included.

iSupport Asset includes report models of iSupport Asset database data built with Microsoft Report Designer. If you have a version of Microsoft SQL Server 2005 other than Express Edition, you can create reports based on these models using Microsoft Report Builder and Microsoft Report Designer. If you have iSupport Asset's Ad Hoc Reports permission, you can access Microsoft Report Builder via the iSupport Asset Reports tab to create ad hoc reports using a simple drag and drop interface. More information on this feature is available by selecting Ad Hoc Reports | Documentation on the Reports tab.



	Name ▲	Modified Date	Description
	Assets	1/28/2010 11:49:46 AM	
	Data Sources	12/12/2008 11:20:57 AM	
	Inventory Scan Results	1/28/2010 11:49:40 AM	

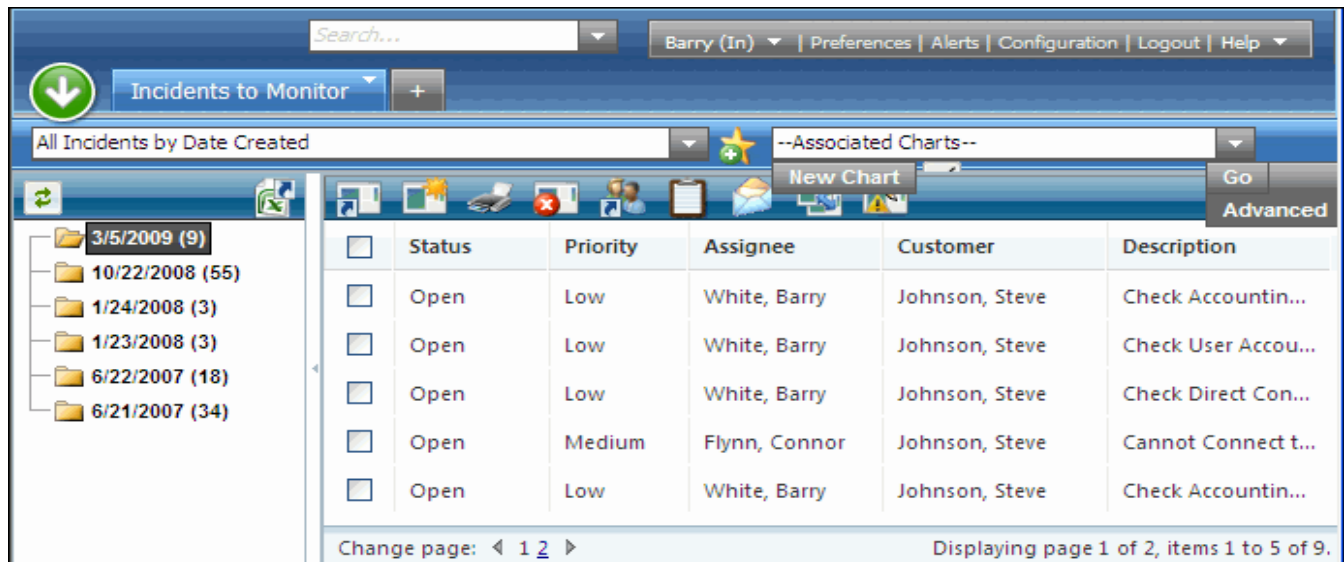
Keyboard Shortcuts

Throughout the application, you can use Microsoft® Internet Explorer® keyboard shortcuts such as Ctrl+W to close a window or Ctrl+F to display the Microsoft® Internet Explorer® Find dialog for text searching.

You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page




- Press Alt < to jump back to the last page




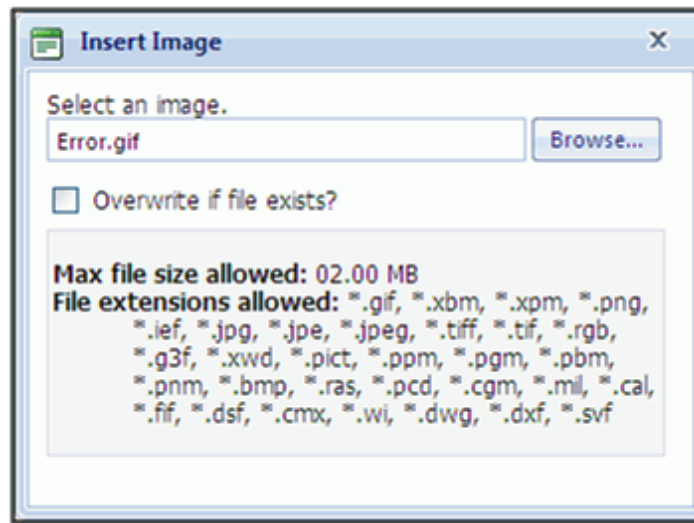
Using the Text Editor Toolbar

Use the text editor toolbar to manipulate text and images in an entry field. In the HTML-based text editor toolbar, tooltips with keyboard shortcuts display as you hover over each icon with the mouse. When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field in fields with the text editor; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen. See [“Setting Preferences for the Desktop” on page 52](#) for more information.



The toolbar options are similar to those in Microsoft Word, with the following exceptions:

- If you have formatted content from Microsoft Word on the clipboard and click the Paste  icon, a prompt will appear with the option of clearing the Microsoft Word formatting.
- You can use the Paste From Word  option to retain Microsoft Word formatting (but all unnecessary Microsoft Office related tags will be cleared).
- The Insert Symbol  icon displays a dropdown list of special characters for insertion.

- You can use the Image Upload  icon to paste saved images up to 2 MB. The following will appear; click the Browse button and select the image. The image will be inserted immediately.

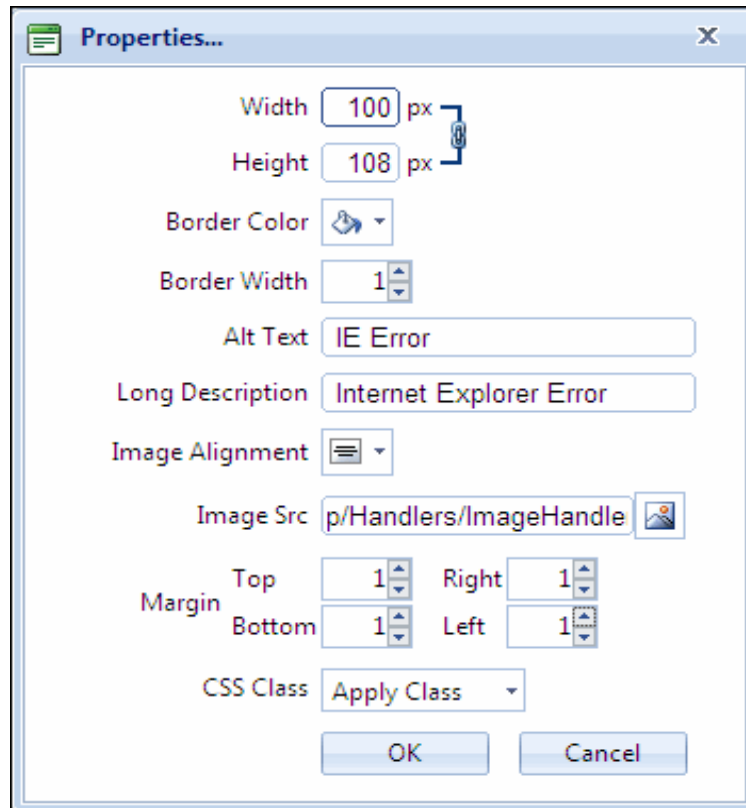





The image will be saved in a folder with the name of the support representative inserting the image. Access to images can be controlled via functionality in the Configuration module.

- You can use the Image Manager  icon to create a new folder for images, upload saved screenshots and other images up to 2 MB, and access the Image Editor  to manipulate images.

Setting Image Properties

After an image is inserted, you can right-click on it and select Properties to create a border, enter alternate text and a description, and other options.

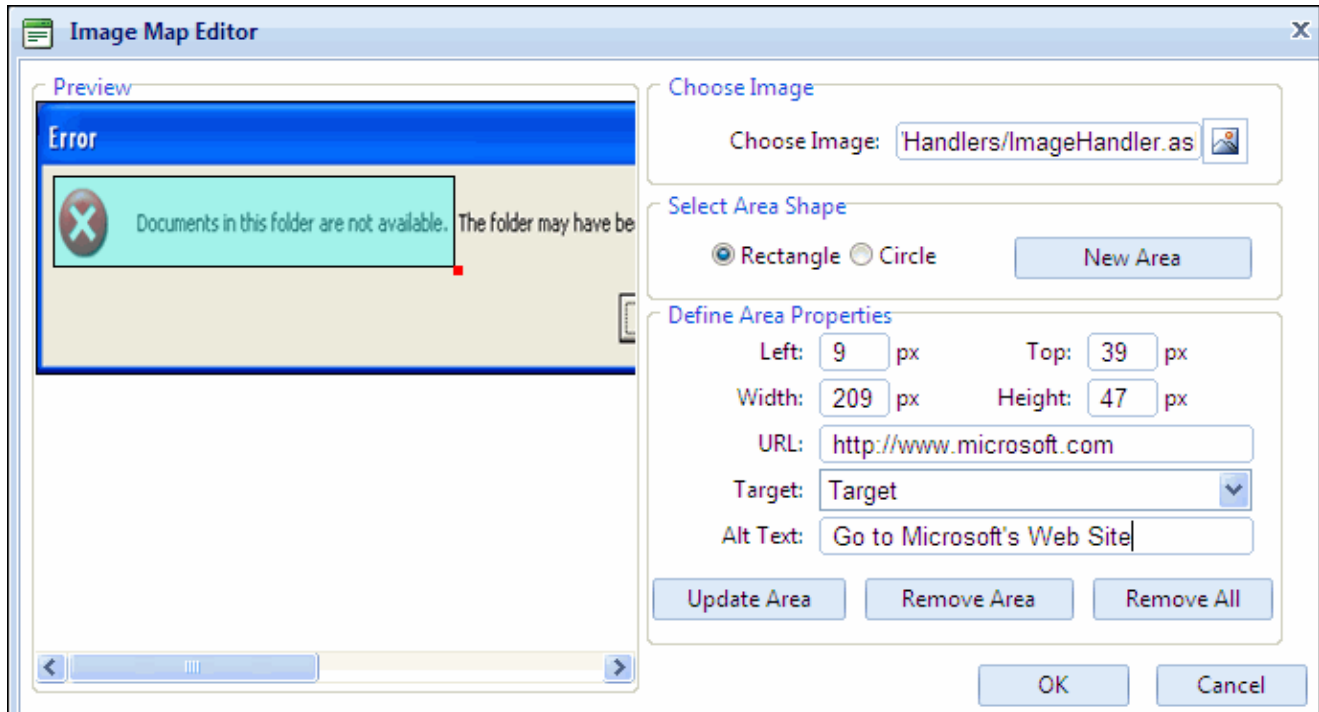


Field	Description
Width Height	Enter the width and/or height for display of the image. (The actual image file will not be changed.) Use the Constrain icon to lock and unlock the aspect ratio:  Locks the aspect ratio  Unlocks the aspect ratio
Border Color	Select the color of the border surrounding the image.
Border Width	Use the + and - symbols to select the thickness of the border surrounding the image. Select 0 to remove the border.
Image Alt Text	Enter text to appear as you hover over the image with your mouse. It will also appear if the image does not display (for example, due to a server connection problem).
Long Description	Enter a description of the graphic. This is for reference only.
Image Alignment	Select the alignment of the image: top, bottom, left, center, or right.
Image Src	Enter the path to the image file on the web server or click the  icon to display the Image Manager dialog.

Field	Description
Margin	Use the + and - symbols to select the amount of space around the image.

Using the Image Map Editor

You can right-click on an image to access the Image Map Editor for creating an area on which, if a user clicks on it, will take the user to a specified URL. Note that image maps are only active on non-editable fields such as those on knowledge entries and closed incidents.



Select the area shape, rectangle or circle, and then click the **New Area** button.

Drag your mouse to create an area on the image. The dimensions of the area populate the **Left**, **Width**, **Top**, and **Height** fields; you can adjust it if necessary. If you later decide you don't want the image map area, you can use the **Remove Area** and **Remove All** buttons to remove one or all of the areas you have defined.



In the **URL** field, enter the URL to which the user will be directed.

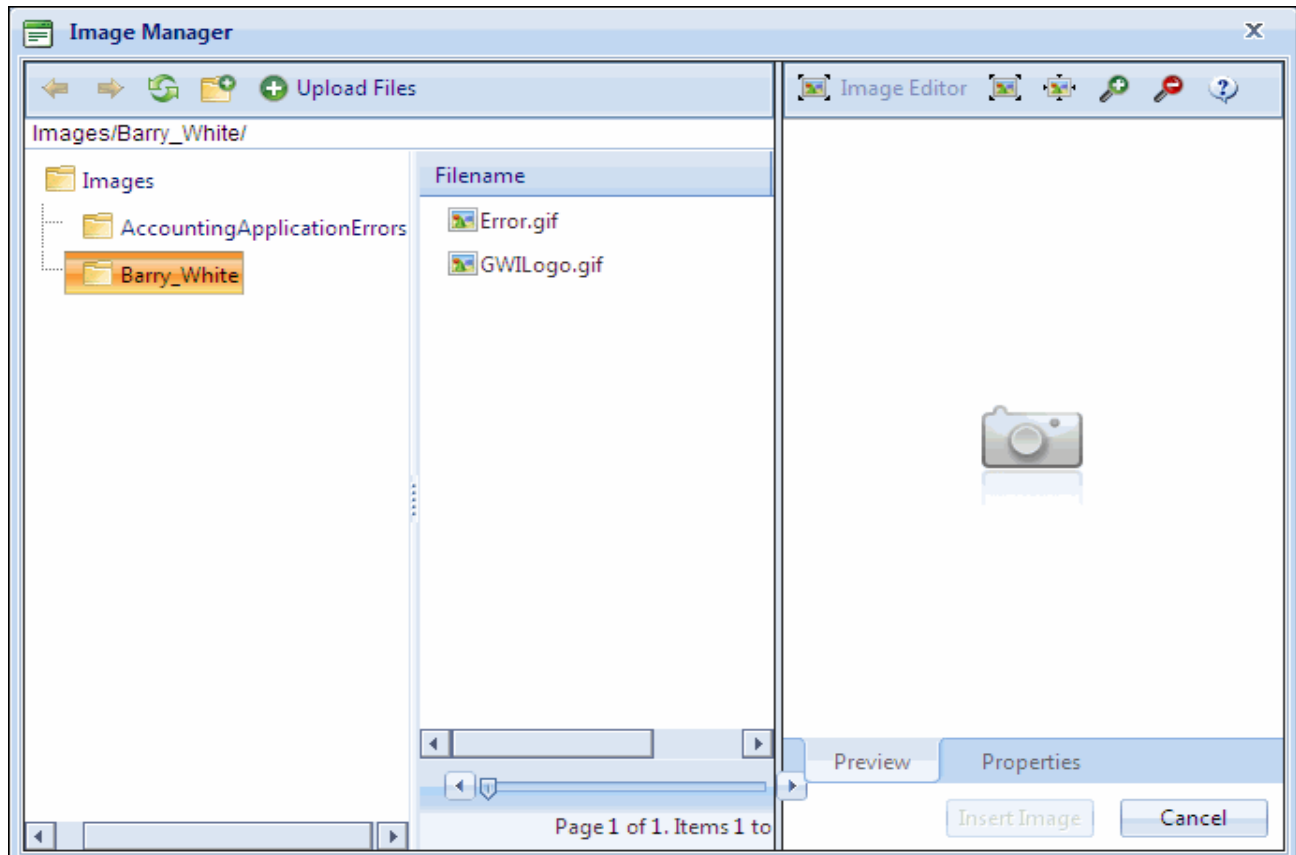
In the **Target** field, select how to display the web page to which the URL will appear.

In the **Comment** field, enter a comment to appear when the mouse hovers over the area.

When finished, click OK.

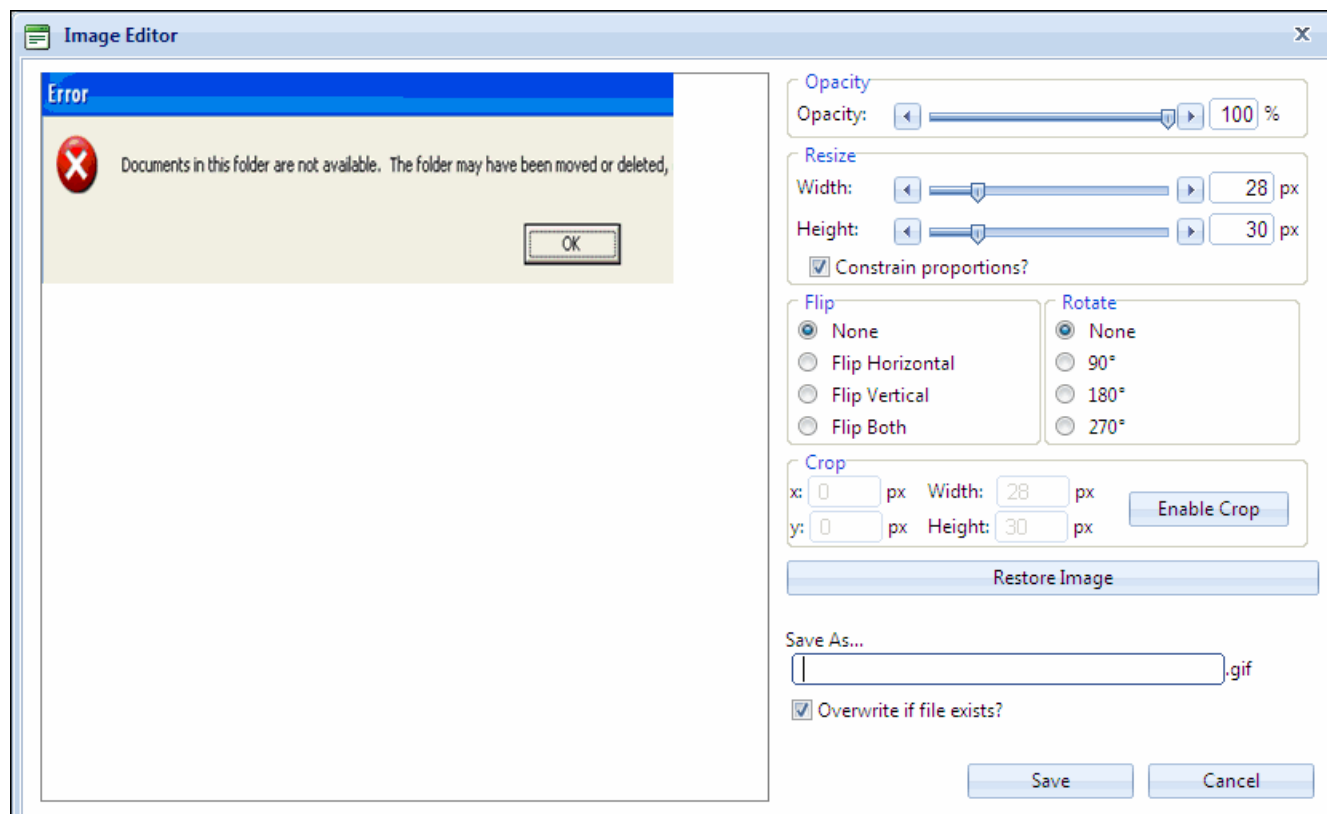
Using the Image Manager

You can use the Image Manager  to create a new folder for images, upload saved screenshots and other images up to 2 MB, and access the Image Editor  to manipulate images. Images are saved in the database and associated with directories on which group access restrictions can be enabled; this is done via the Administration | Image Management option in the Configuration module. (Note that images in inbound email are stored as attachments on the Correspondence record.)



Using the Image Editor

Use the Image Editor  to resize, flip, rotate, crop, or change the opacity of an image.

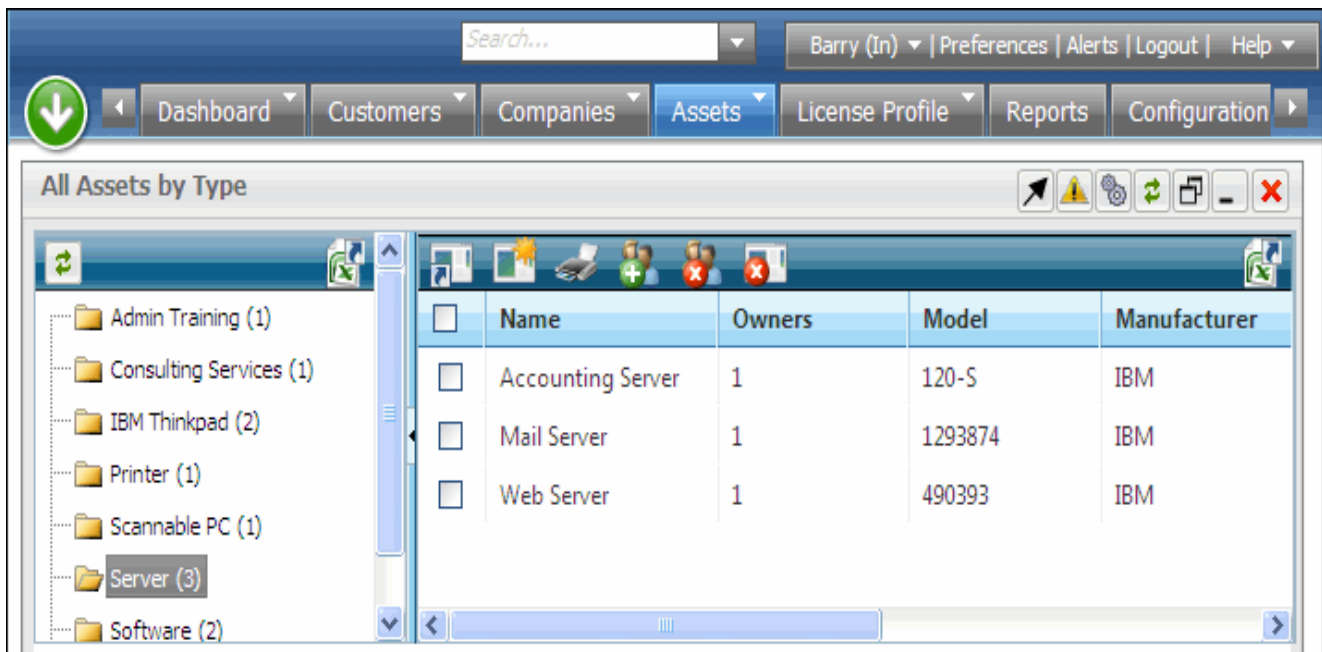


Field	Description
Opacity	Use the slider bar, icons, or entry fields to change the transparency of the image.
Resize Width Height	Use the slider bar, icons, or entry fields to change the size of the image. Select the Constrain Proportions checkbox to lock the proportion ratio.
Flip	Select the direction to turn the image: horizontally, vertically, or both.
Rotate	Select the degree in which to turn the image.
Crop	Select the Enable Crop button to display a red resizable box around the image, and then use your mouse or enter the number of pixels for the dimensions in which an area should be cut from the image.
Save As	Enter a name for the changed image. Select the Overwrite If File Exists checkbox to overwrite the file if your entry is the same as an existing file.


2 Using the Desktop

Overview

The Desktop provides access to all iSupport Asset functionality.



You can:

- Click the **action**  menu icon to access to all of iSupport Asset's entry screens as well as the viewing and charting options. See ["Using the Action Menu" on page 19](#) for more information.
- The **Home and Views tabs** are included by default; you can rename tabs, add and name tabs and include content in varying widths, set up tabs to display on the Desktops of other support representatives, and save tabs for use later. See ["Working With Tabs" on page 23](#) for more information. See ["Using Views" on page 19](#) for information on using icons and functions related to iSupport Asset data views.
- Access the **View Designer** to create views of iSupport Asset data for display on the Desktop. See ["Using the View Designer" on page 27](#) for more information.
- Access the **Chart Designer** and manage access to charts. See ["Using the Chart Designer" on page 37](#) for more information.


- Create **alerts** that will appear at the top of the Desktop tabs when a view field reaches a certain threshold. The alert can also be sent via email and page. See [“Creating Alerts” on page 44](#) for more information.
- Use the **Search** dropdown to perform a literal search for a character string within all iSupport Asset data. If only one record matches the search, the record will open automatically when selected. See [“Performing Searches” on page 49](#) for more information.
- Display a **Reports tab** for creating and viewing SQL reports. See [“Creating and Viewing SQL Reports” on page 57](#) for more information.
- Display a **Configuration tab** for configuring all iSupport Asset functionality.
- Use the **function bar** in the upper right corner for setting preferences and availability, creating alerts, accessing the Configuration module, logging out, and accessing documentation. See [“Using Options on the Function Bar” on page 50](#) for more information.
- Add a **customized toolbar** for commonly used actions. See [“Configuring a Create Toolbar” on page 53](#).

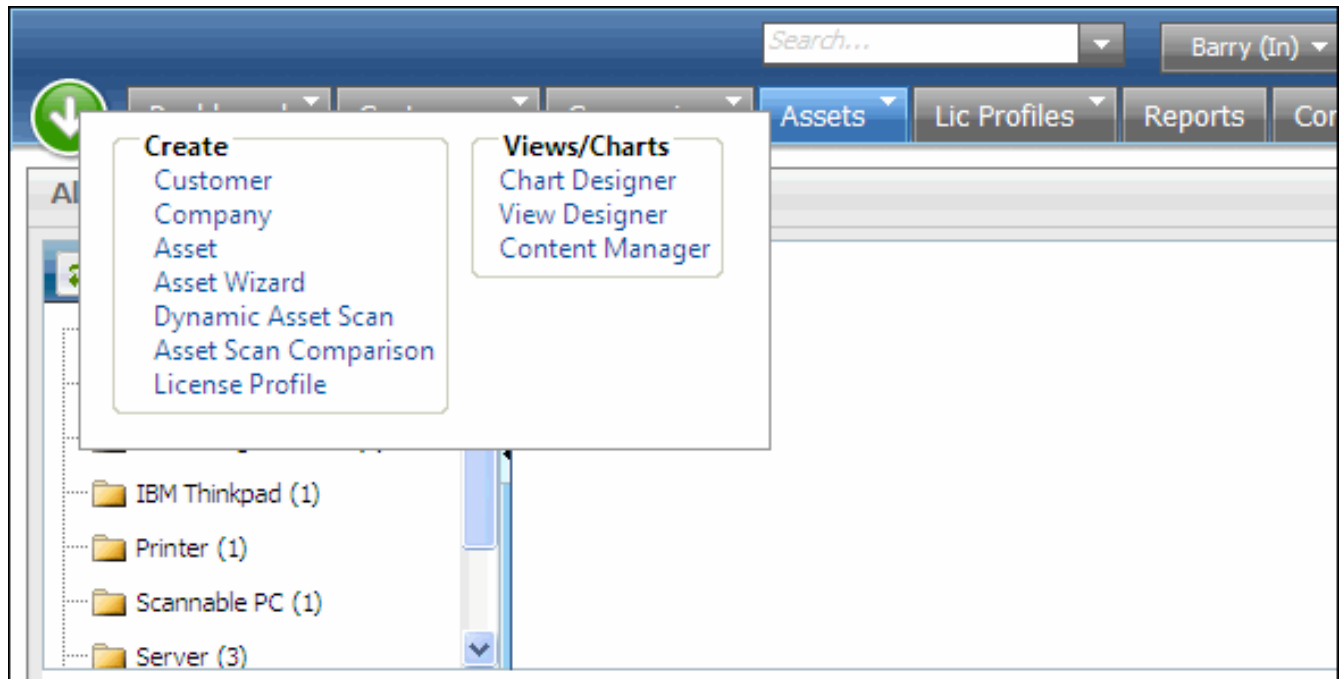


If permissions are enabled during configuration, you may not be able to:

- View reports, assets, companies, or Customer Profile records
 - Create or delete assets, companies, or Customer Profile records
-

Using the Action Menu

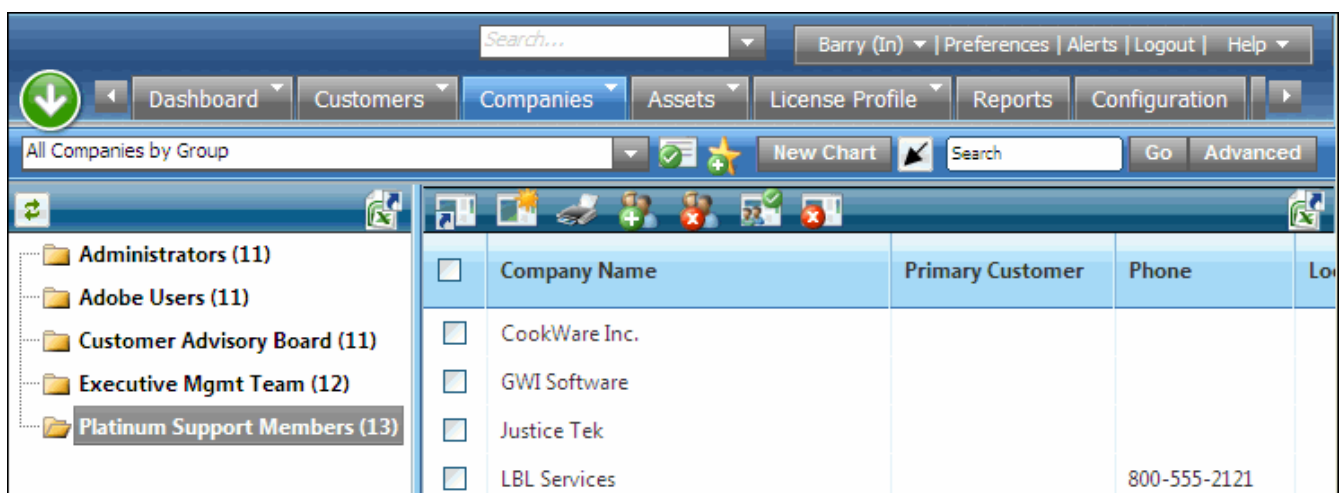
Click the action  menu icon to access to all of iSupport Asset's entry screens as well as the viewing and charting options.






Functionality may not appear for support representatives if permissions are enabled in the Configuration module.


Using Views


Use the view area to display and open customer, company, software license profile, and asset records. Use the View dropdown to select the view to display.

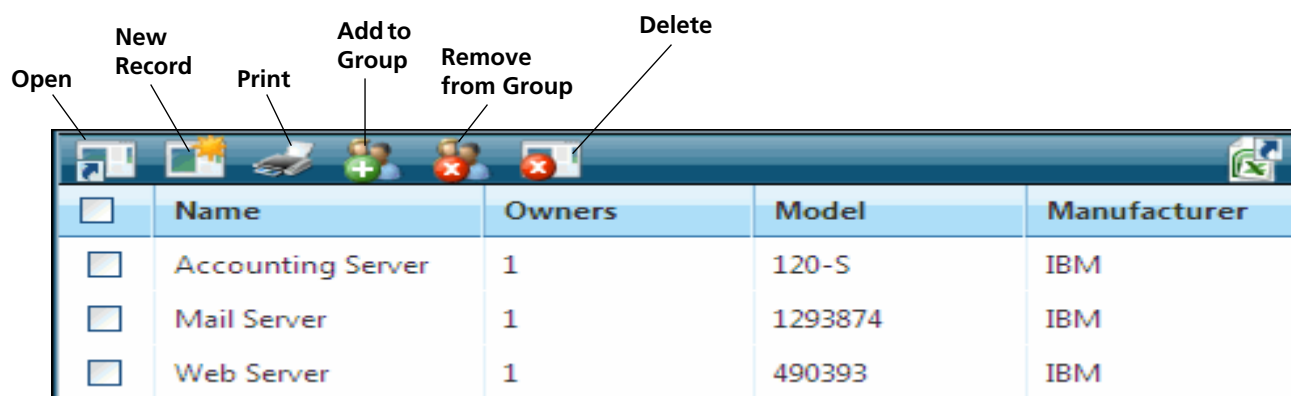


The following options appear when the view is maximized:

- Use the **Make Default**  icon to change the default view to the current view (applies to maximized content only).
- Use the **Add to Favorites**  icon to add the current view to your Favorite Views list.
- Use the **Associated Chart** menu to display any chart associated with the view in a new window. The **New Chart** button displays the Chart Designer.
- Use the **Minimize in Tab**  icon to display the view in a frame instead of maximized in the tab.
- Use the **Search** field to perform a literal case-insensitive search for a character string within all data displayed in the current view. Place the cursor in the Search field, enter the character string, and click Go. You can search for a number in a view even if it doesn't exist in a displayed column.

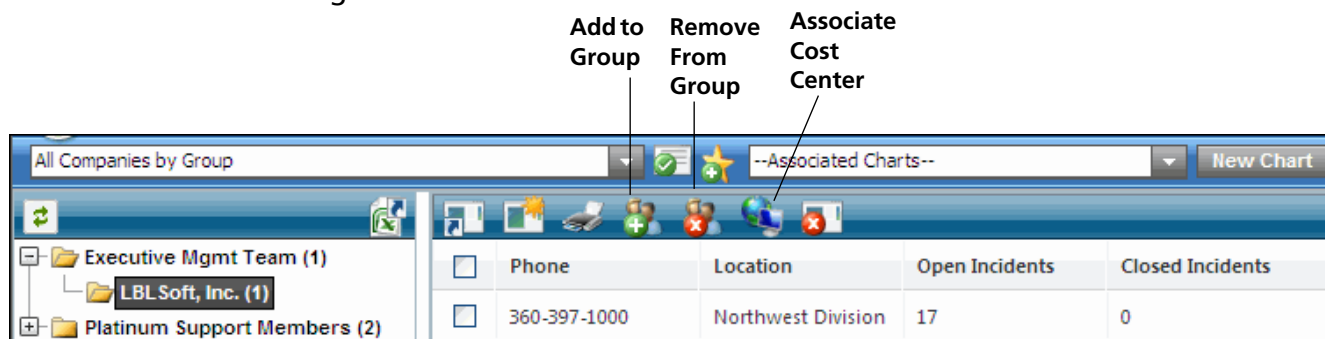
The **Advanced** link on the Desktop enables you to define up to three sets of criteria for searching data in the view. In the Advanced Search dialog, select a field and a comparison method and enter the text string. Click the Add link to enter another set of criteria. When finished, click the Search button. After the results display, you can click the Cancel Search  icon to clear the search results.

- Views do not refresh automatically when items are created, changed, or deleted. To refresh a view, click on the **Refresh**  icon.
- You can open any item in a view by clicking on it, and you can click on a column heading to sort it in ascending/descending order.
- Use the icons in the view column area to print, delete, and open multiple records. You can also add to customer and asset groups. If a field includes an ellipsis (...), the full text will appear when you hover over it with your mouse.

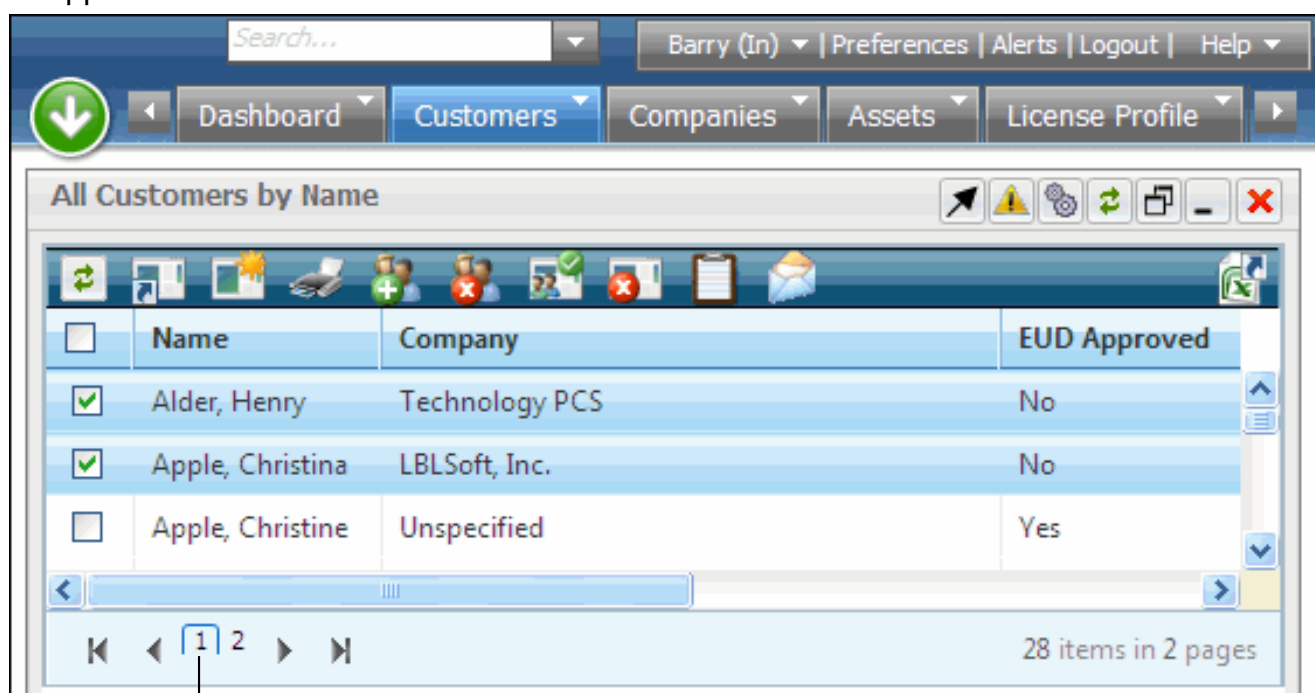


	Name	Owners	Model	Manufacturer
<input type="checkbox"/>	Accounting Server	1	120-S	IBM
<input type="checkbox"/>	Mail Server	1	1293874	IBM
<input type="checkbox"/>	Web Server	1	490393	IBM

The icons that appear relate to the view selected; for example, Customer and Company views include the following icons.



- You can specify the number of entries per page in the Preferences screen; when the number of entries exceeds the specified number of view entries per page, a set of view paging links appear at the bottom of the entries as shown below:




View paging links

You can use the following keyboard shortcuts for paged views on the Desktop:

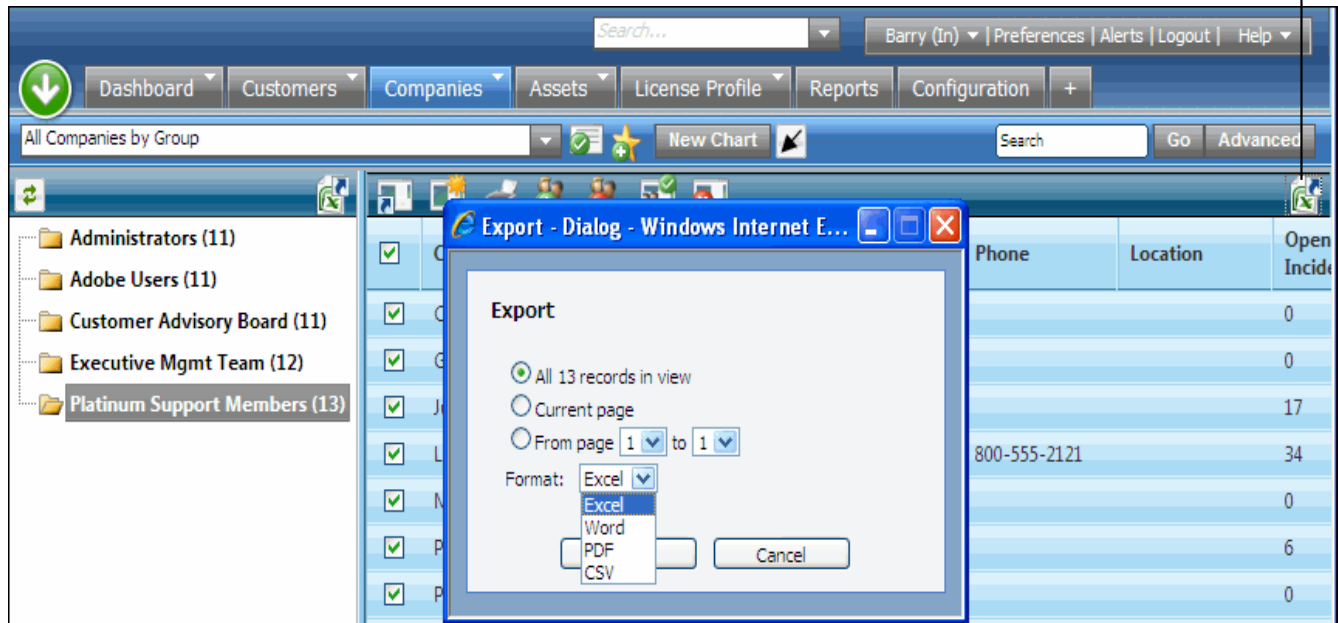
- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page
- Press Alt < to jump back to the first page

Exporting View Data

The Export View  icon enables you to export view data in Microsoft® Excel (*.xls) format, Microsoft® Word (*.doc) format, Portable Document Format (*.pdf), or Comma Separated Value Format (*.csv). Comma Separated Value Format is usable with Microsoft Excel and other third party tools.

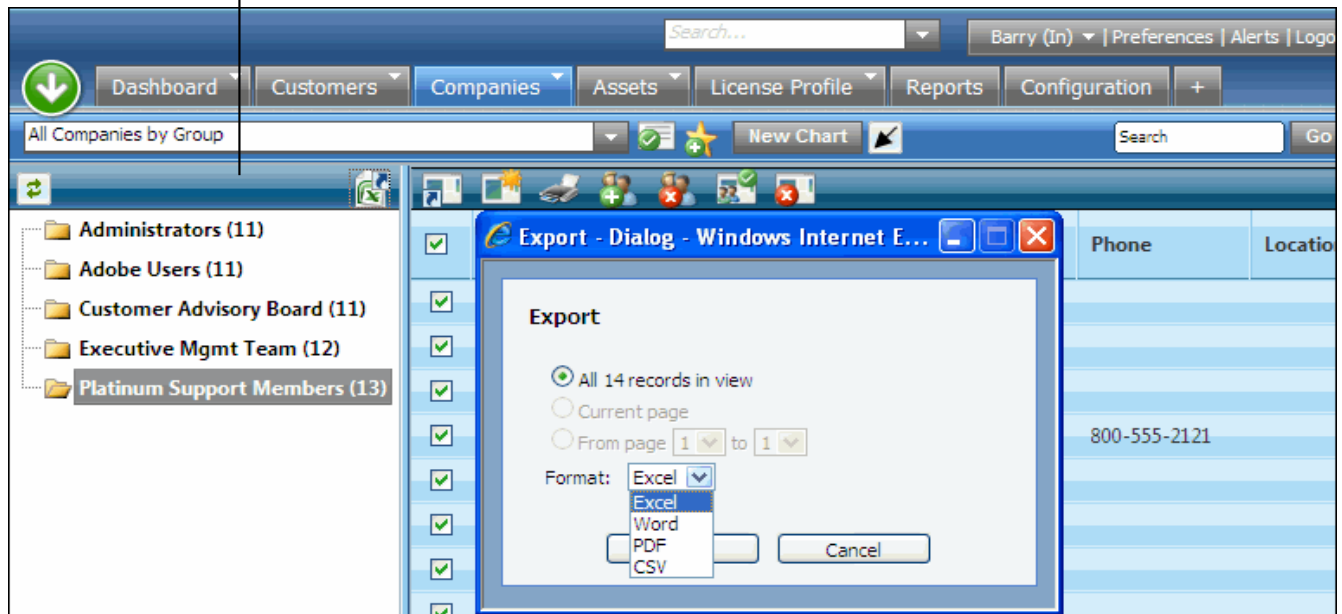
Use the Export icon in the right frame to export the data represented in the right frame; you'll be able to export all records at once, the current page, or a range of pages, all based on your current view, search, and sorting criteria.

Export icon



Use the Export All Records in View icon in the left categorized frame to export all records in the view, preserving any search results.

Export All Records in View icon



A warning message may appear if using Microsoft® Excel® 2007. This occurs because iSupport Asset exports the file as HTML and places an .xls extension on the file so users can view the file in Microsoft® Internet Explorer® if needed. Click Yes in the warning dialog to continue the export.

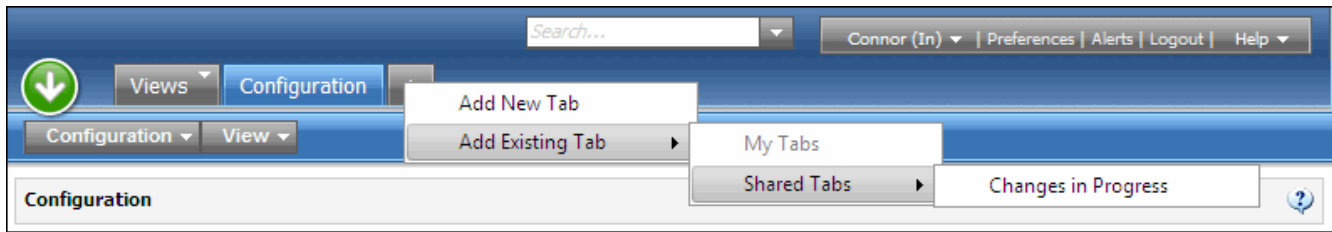
If you export more than Microsoft® Excel®'s limitation of 65,536 records, you'll have the option of exporting the data in comma-separated value (CSV) format or exporting only up to the limit of 65,536 records.


Working With Tabs

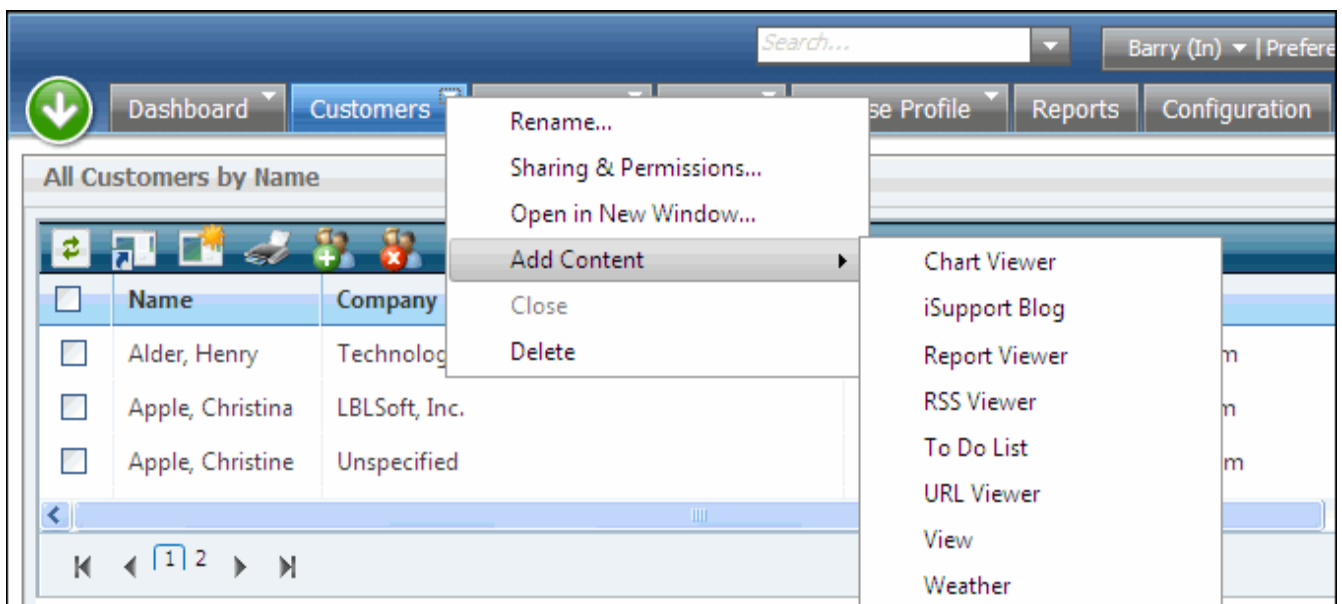
You can add charts, URLs, RSS feeds, reports, weather, and views of iSupport Asset data to Desktop tabs. You can also add a To Do list and include a field for searching for knowledge entries. The content can display in frames of varying sizes or maximized in the tab. You can save tabs for use later, and share tabs with other support representatives.

Adding Tabs

To add a new or existing tab, click the Add Tab  icon on the Desktop. Select Add New Tab to create a new tab; select Add Existing Tab | Shared Tabs to add a tab that has been created with Shared access (enabling others to add it to their Desktop).




The tab appears on the Desktop; use the tab dropdown  icon display a menu for renaming, sharing, opening in a new window, adding content, closing, and deleting the tab.



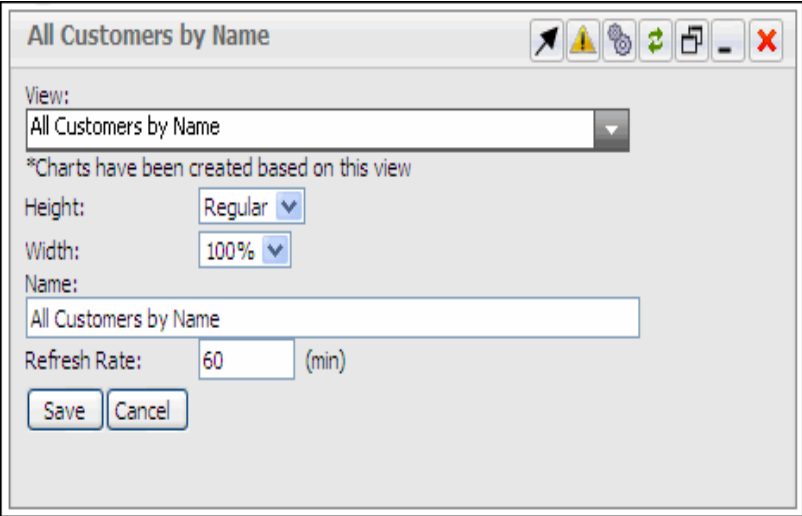
Adding Tab Content

To add content to a tab, select Add Content on the tab menu. You can add the following:

- **Chart Viewer** - Displays private or shared charts (predefined or created via the Chart Designer). See ["Using the Chart Designer" on page 37](#) for information on creating charts.
- **iSupport Blog** - The iSupport Blog enables you to view and comment on the iSupport and iSupport Marketing blogs.
- **Knowledge Search** - Displays the Knowledge Search field.
- **Report Viewer** - Displays a specified SQL report in the cSupport/Reports folder on your report server. Note that due to a limitation in Microsoft's RSClientPrint control, iSupport Asset's SQL Report Viewer functionality is only supported with Microsoft® Internet Explorer®. Mozilla® Firefox®, Google™ Chrome, and Apple® Safari® can be used to view a report, but certain reporting features are not supported with those browsers.

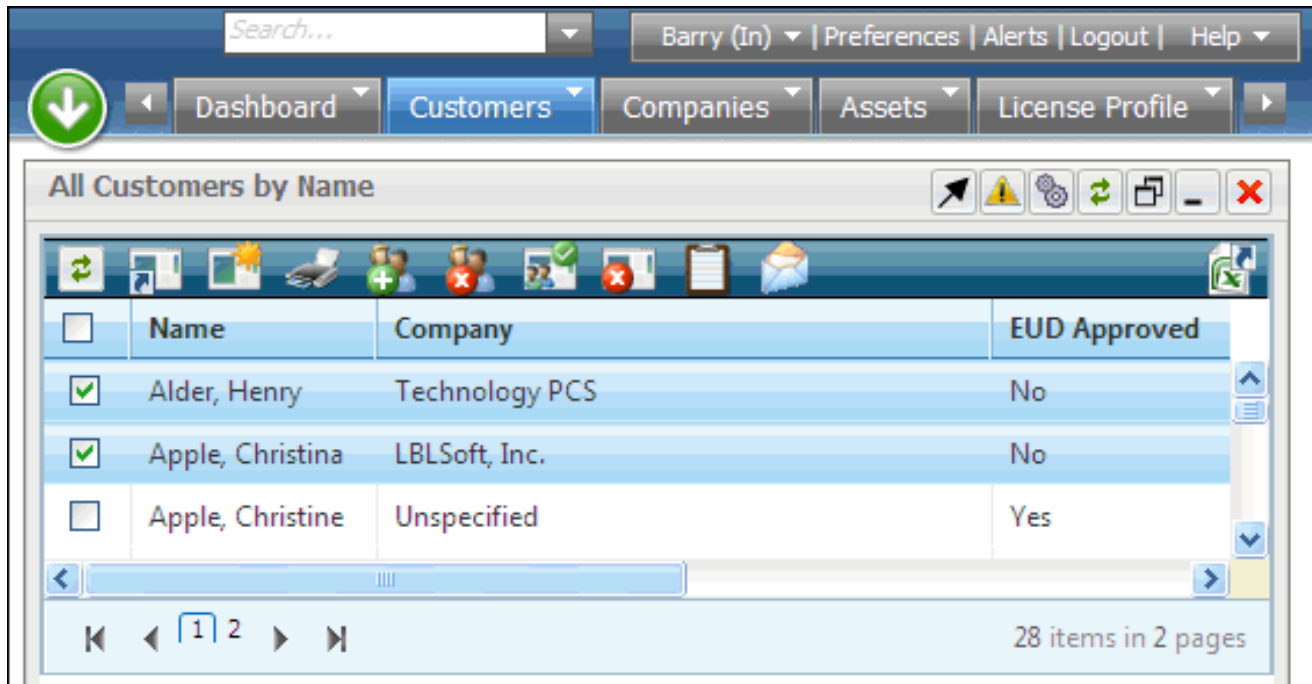
- **RSS Viewer** - Displays an RSS 2.0 feed. When you specify the RSS Feed URL, be sure to include "http://" in your entry.
- **To Do List** - Enables you to create entries with a deadline and check off items when finished.
- **URL Viewer** - Displays a web page. When you specify the URL in the Preferences screen, be sure to include "http://" in your entry.
- **View** - Displays iSupport Asset's predefined views and views created via the View Designer. See ["Using the View Designer" on page 27](#) for information on creating views. If you display a different view on a tab, you can click the Make Default  icon to designate the current view as the content for the tab.
- **Twitter Viewer** - Displays Twitter entries for a valid Twitter account.
- **Weather** - Displays the weather report from www.nws.noaa.gov.
- **Configuration Item Relationship Viewer** - Graphically displays the configuration items related to a specified configuration item.

After creating the tab, the fields for configuring the content will appear. The Height, Width, Display, Name, and Refresh Rate fields will appear with every component:











Field	Description
Height	Select the height of the component frame: Regular or Tall. Select Tall for content such as vertical thermometer charts.
Width	Select the percentage for the width of the component: 16%, 25%, 30%, 50%, 70%, or 100% of the Desktop window.
Name	Enter the name to appear at the top of the frame.
Refresh Rate	Enter the number of minutes in the interval for the frame content to automatically refresh.

A feature-specific field will also appear; for example, if you selected View, you'll be able to select the view. Click the Save button. The content appears in a frame as shown in the example below:



Using Frame Icons

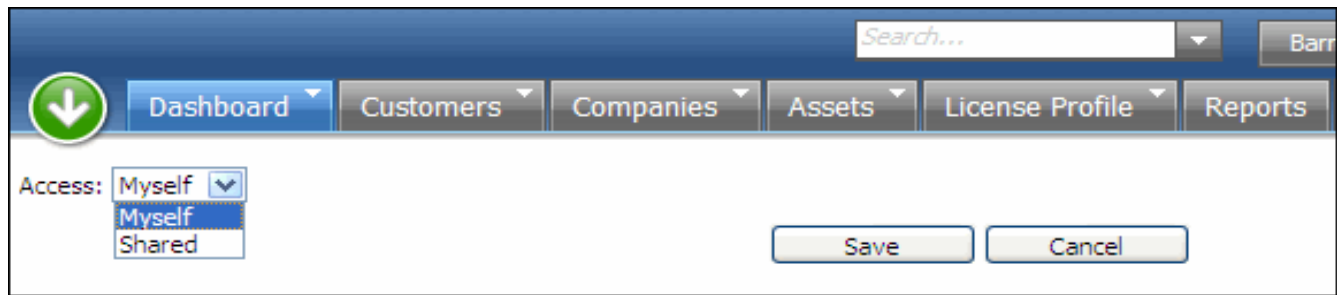
After frame content has been created, you can do the following:

- Use the Maximize in Tab  icon to display the content in the entire tab. After the content is maximized, you can click the Minimize in Tab  icon to revert back to the original frame size.
- Use the Alert  icon to create an alert that will appear at the top of the Desktop tabs when a view field reaches a certain threshold. The alert can also be sent via email and page. See ["Creating Alerts" on page 44](#) for more information.
- Use the Configure  icon to make changes to the frame height, width, name, refresh rate, and content.
- Use the Refresh  icon to refresh the content on the tab.
- Use the New Window  icon to display the content in a new browser window.
- Use the Minimize  icon to minimize the content and display only the title bar of the frame.
- Click the Delete  icon to delete frame from the tab.

After adding a frame and saving, if the frame is not maximized in the window, you can reposition the frame by clicking on the frame title bar and dragging and dropping it to another position.

Specifying Tab Access

Use the Sharing and Permissions option the tab menu to control tab access.



The screenshot shows the iSupport Asset Desktop interface. At the top, there is a search bar and a user profile dropdown (Barry). Below this is a navigation bar with tabs: Dashboard, Customers, Companies, Assets, License Profile, and Reports. The 'Assets' tab is currently selected. Below the navigation bar, there is an 'Access' dropdown menu with options: Myself, Myself, and Shared. The 'Myself' option is selected. To the right of the dropdown are 'Save' and 'Cancel' buttons.

In the Access field:

- Select Myself to keep a tab private so only you can add it to your Desktop.
- Select Shared to make the tab available so that other support representatives can add it to their Desktop. Note: a tab set as your default cannot be designated as a shared tab.

Tab access (including restricting access by group) may be further controlled via options in the Configuration module.

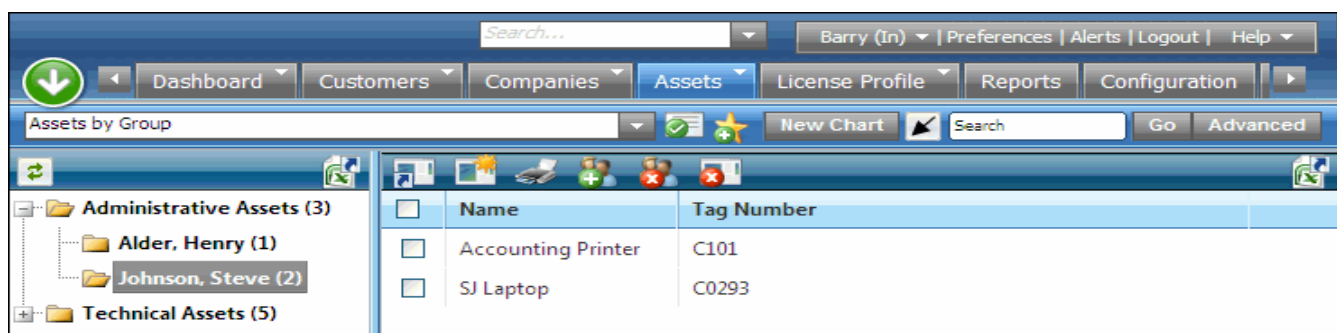
Using the View Designer

Use iSupport Asset's View Designer to create a new view or make a copy of an existing view and modify it to create a new view of iSupport Asset data for display on the Desktop. (Note, however, that you cannot modify shared views included by default in iSupport Asset.) You can utilize iSupport Asset's predefined data fields or any custom SQL views/queries that you have created.

You can access the View Designer via the View Designer option on the Desktop action menu, the Edit button on a Desktop tab content frame, and the Edit and Copy links after selecting a view in the Content Manager.

To make a copy of an existing view, select Content Manager on the Desktop action menu, select the view on which to base your customized view, and select Copy.

The following sections reference creation of a custom view named Assets by Group:



The screenshot shows the iSupport Asset Desktop interface with the 'Assets by Group' view selected. The view displays a list of assets grouped by category. The left sidebar shows a tree view with 'Administrative Assets (3)' and 'Technical Assets (5)'. The main area shows a table of assets.

Name	Tag Number
Accounting Printer	C101
SJ Laptop	C0293

An example of view settings in the View Designer is shown below.

The screenshot shows the View Designer interface. At the top, the 'View Name' is 'Assets by Group', 'Access' is 'Myself', 'Enabled' is 'Yes', and 'Subfolder Name' is 'Management Reports'. Below these are buttons for 'Save', 'Cancel', 'New Chart', and 'New Alert'. The main area is divided into 'Design' and 'Preview' tabs. Under 'Design', the 'Data Source' is 'Assets' and 'For Records Pending Deletion' is 'Exclude Records Pending Deletion'. On the left, a tree view shows 'Asset fields' including Comments, Company, Custom Fields, Groups, Is Inventory Type, Location, Maintenance Expiration Date, Manufacturer, Model, Name, Owners, Purchase Date, Serial Number, Service Contracts, and Source. On the right, a table lists columns with their settings.

<input type="checkbox"/>	Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction	Column Width (px)	Null Text	True/False Text
<input type="checkbox"/>	Owners Name	Add	2	Hidden	2	Ascending	100	Unspecified	
<input type="checkbox"/>	Groups Name	Add	1	Hidden	1	Ascending	100	Unspecified	
<input type="checkbox"/>	Name	Add	None	1	3	Ascending	100	Unspecified	
<input type="checkbox"/>	Tag Number	Add	None	2	Unsorted	None	100	Unspecified	

Naming the View and Specifying Access

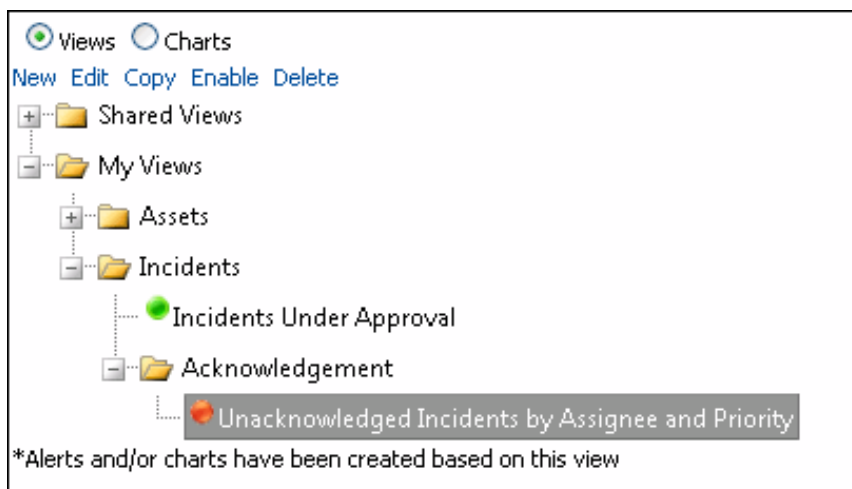
Enter the name of the view in the **View Name** field.

This close-up shows the 'View Name' field containing 'Assets by Group'. To its right is a dropdown menu also showing 'Assets by Group' with an 'Edit' link. Below the 'View Name' field are the 'Access' (Myself), 'Enabled' (Yes/No), and 'Subfolder Name' (Management Reports) fields, along with 'Save', 'Cancel', 'New Chart', and 'New Alert' buttons.

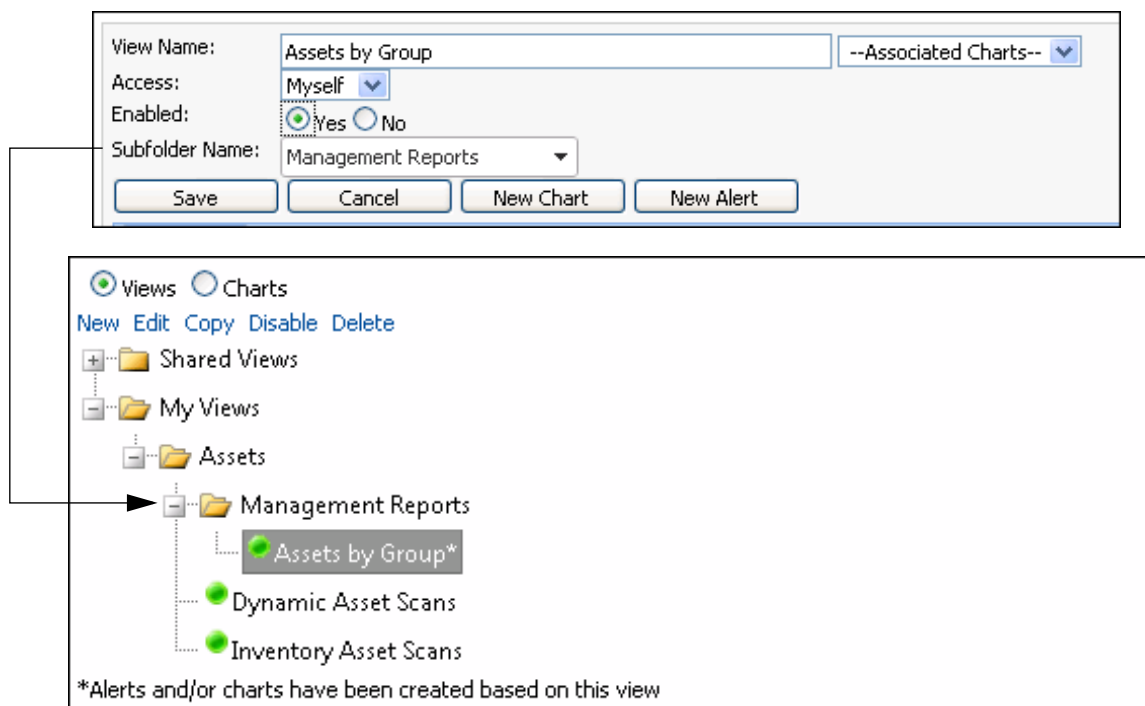
This name will appear in view lists (for example, in the view dropdown field in the tab content configuration dialog).

If displaying settings for an existing view on which one or more charts have been defined, the charts appear in the **Associated Charts** dropdown along with an Edit link. You can select a chart and click the Edit link to display the chart settings in the Chart Designer. In the **Enabled** field, select No if you wish to prevent the view from being included in the Chart Designer, Alert settings

screen, and in the list of views available for selection in the View dropdown field in the tab content configuration dialog. Disabled views will appear as follows:



In the **Subfolder Name** field, enter the name of the folder in which to place the view in the Content Manager and in view lists. This folder will be placed under the folder named after the data source selected for the view.



In the **Access** field, select:

- **Myself** to keep the view private so only you can add it to your Desktop. The view will appear in the My Views folder in view lists (for example, in the View dropdown field in the tab content configuration dialog).

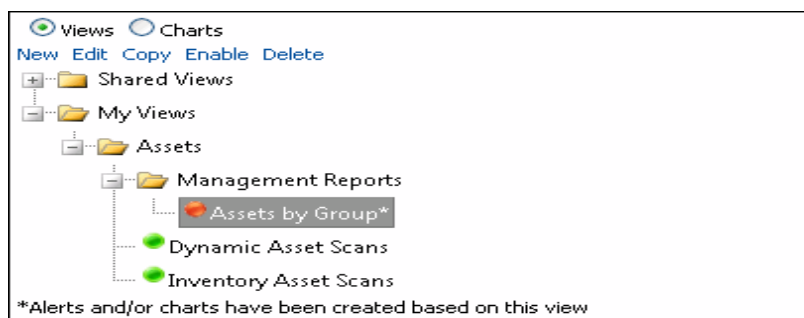


- **Shared** to make the view available for other support representatives to add to their Desktops. You can click the Configure link to restrict access to the view to only specified support representatives and support representative groups.



If you designate a view as Shared, it will appear to you under in the My Views folder; the My Views folder contains views that you have personally created via the View Designer.

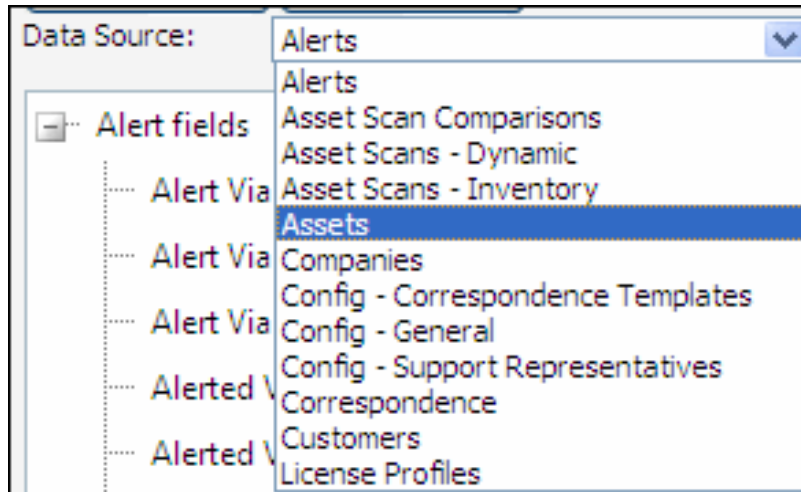
In the **Enabled** field, select No to prevent the view from being included in the Chart Designer, Alert settings screen, and in the list of views available for selection in the View dropdown field in the tab content configuration dialog. Disabled views will appear as follows in the Content Manager:



Selecting the Data Source

Select the source of the data on which the view will be based. The Config options correspond to

settings in the Configuration module.



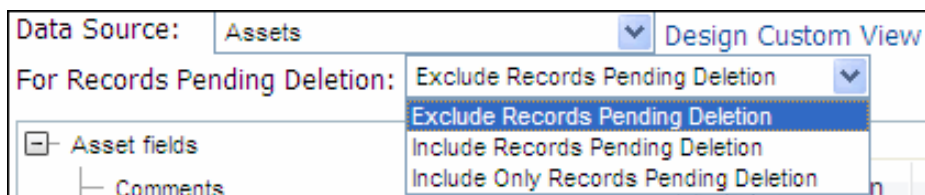
Use the **Design Custom View** link next to the Data Source Field to utilize any custom SQL views/queries of iSupport Asset data. The Custom Table or View Name field appears for you to enter the name of the query or custom SQL table of iSupport Asset data. Click the Load Columns button to display the fields available for the view.

Custom Table or View Name:	<input type="text" value="ImportedAssets"/>	<input type="button" value="Load Columns"/>	Design Standard View
----------------------------	---	---	--------------------------------------

Use the **Design Standard View** link to redisplay the Data Source field.

Using the For Records Pending Deletion Field

The **For Records Pending Deletion** field appears for data sources that have pending deletion functionality (Assets, Companies, Config - Support Representatives, and Customers).



Records pending deletion have been deleted by an iSupport Asset user but are retained in the system because of references to other records (for example, correspondence). The Database Maintenance agent ultimately removes the record. Use the For Records Pending Deletion field to specify whether to include, exclude, or include only records pending deletion.

Including Fields in the View

The data source fields available for the view appear in the navigator on the left; drag the applicable fields to the section on the right.

Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction	Column Width (px)	Null Text	True/False Text
<input type="checkbox"/> Owners Name	<input type="checkbox"/> Add	2	Hidden	2	Ascending	100	Unspecified	
<input type="checkbox"/> Groups Name	<input type="checkbox"/> Add	1	Hidden	1	Ascending	100	Unspecified	
<input type="checkbox"/> Name	<input type="checkbox"/> Add	None	1	3	Ascending	100	Unspecified	
<input type="checkbox"/> Tag Number	<input type="checkbox"/> Add	None	2	Unsorted	None	100	Unspecified	

To remove a field from the view, select the checkbox next to the field and click the Remove link.

Under **Column Heading**, enter the text labeling the folder or column. If you select a field on a lower level in the navigator, all levels will appear in this field; edit it as necessary. You can hover your cursor over the Details icon to display the original name of the data source field.

	Column Heading	Filter	Folder Level	Column Display Order	Sort Order
<input type="checkbox"/>	Owner Name	Add	2	Hidden	2
<input type="checkbox"/>	Group Name	Add	1	Hidden	1
<input type="checkbox"/>	Name	Add	None	1	3
<input type="checkbox"/>	Tag Number	Edit	None	2	Unsorted

Filtering Your View

To set parameters for minimizing the amount of data that appears in the view, click the Add link. The Add Filter link appears; comparison methods applicable to the field appear in the dropdown. Select the comparison method and then enter the value to be used with it if applicable. Click Add to select another comparison method or click Finish when you are done.



If a date field is selected, the Between comparison method does not include beginning and ending dates. The Current Week method is based on a Sunday through Saturday timeframe.

In the following example, the view will only include assets with a tab number.

<input type="checkbox"/>	Column Heading	Filter	Folder Level	Column Display Order ^	Sort Order	Sort Direction	Column Width (px)
<input type="checkbox"/>	Owner Name	Add	2	Hidden	2	Ascending	100
<input type="checkbox"/>	Group Name	Add	1	Hidden	1	Ascending	100
<input type="checkbox"/>	Name	Add	None	1	3	Ascending	100
<input type="checkbox"/>	Tag Number	Edit	None	2	Unsorted	None	100
Remove Filter <input type="button" value="Is Not Null"/> Add							
Finish							
<div><div>None</div><div>Contains</div><div>Does not contain</div><div>Is</div><div>Is Not</div><div>Is Null</div><div>Is Not Null</div><div>Starts with</div><div>Ends with</div></div>							

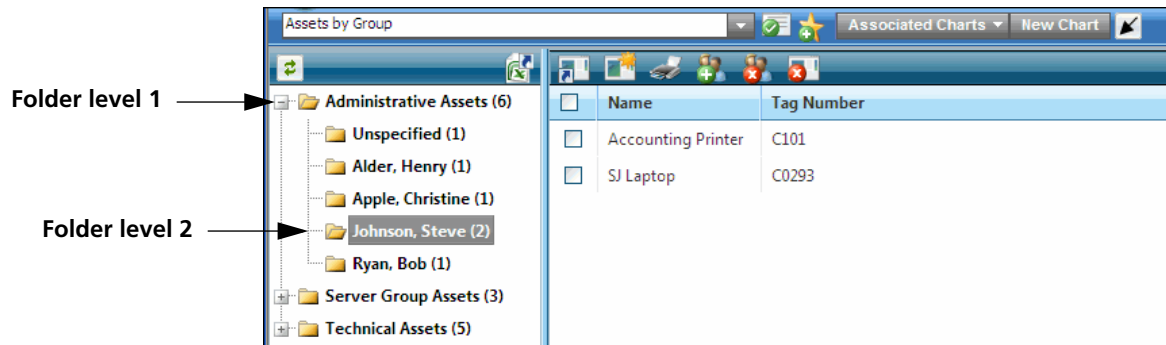
After a filter is created, you can hover your cursor over the Edit link to quickly display your filter.

<input type="checkbox"/>	Name	Add	None	1	3
<input type="checkbox"/>	Tag Number	Edit	None	2	Unsorted
<div>Is Not Null</div>					

Specifying Folders in the View

Use the Folder Level column to display a view field as a folder in the left navigator; enter the number for the position of the field as shown in the following example. If you wish to only display the data as a folder, be sure to select Hidden in the Column Display Order field.

Folders in View



Settings in View Designer

Column Heading	Filter	Folder Level
Owner Name	Add	2
Group Name	Add	1

Specifying View Columns

Select the number for the position of the column in the view (listed left to right): 1 = first column, 2 = second column, etc. Select Hidden if you do not wish to display the column (for example, if it is used as a folder in the left navigation frame).

View Columns

1
↓

2
↓

Name	Tag Number
Accounting Printer	C101
SJ Laptop	C0293

Settings in View Designer

Column Heading	Filter	Folder Level	Column Display Order ^
<input type="text" value="Owner Name"/> ⓘ	Add	2 ▼	Hidden ▼
<input type="text" value="Group Name"/> ⓘ	Add	1 ▼	Hidden ▼
<input type="text" value="Name"/> ⓘ	Add	None ▼	1 ▼
<input type="text" value="Tag Number"/> ⓘ	Edit	None ▼	2 ▼

Setting the Sort Order and Direction

In the **Sort Order** column, select the number for the order in which the field will be sorted relative to the rest of the fields in the view.

If a sort order was selected, select the following in the **Sort Direction** field:

- Ascending to sort field values in order from first to last/lowest to highest (alphabetically A-Z, lowest number to highest number).
- Descending to sort field values in order from last to first/highest to lowest (alphabetically Z-A, highest number to lowest number).

In the example below, assets are sorted first by asset group, then by owner name, then by asset name.

View

Sort Order 1: Group in Ascending Order

Sort Order 2: Owner in Ascending Order

Sort Order 3: Name in Descending Order

Name	Tag Number
Accounting Printer	C101
SJ Laptop	C0293

Settings in View Designer

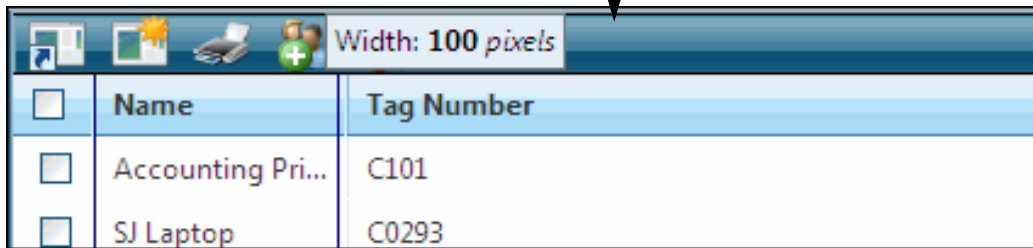
Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction
Owner Name	Add	2	Hidden	2	Ascending
Group Name	Add	1	Hidden	1	Ascending
Name	Add	None	1	3	Ascending
Tag Number	Edit	None	2	Unsorted	None

Specifying the Column Width

Under Column Width (px), enter the width (in pixels) for the field to appear in the view column.

When you display the view and resize the column, the width in pixels will appear in a tooltip.

Width appears in the view when you resize a column



	Name	Tag Number
<input type="checkbox"/>	Accounting Pri...	C101
<input type="checkbox"/>	SJ Laptop	C0293

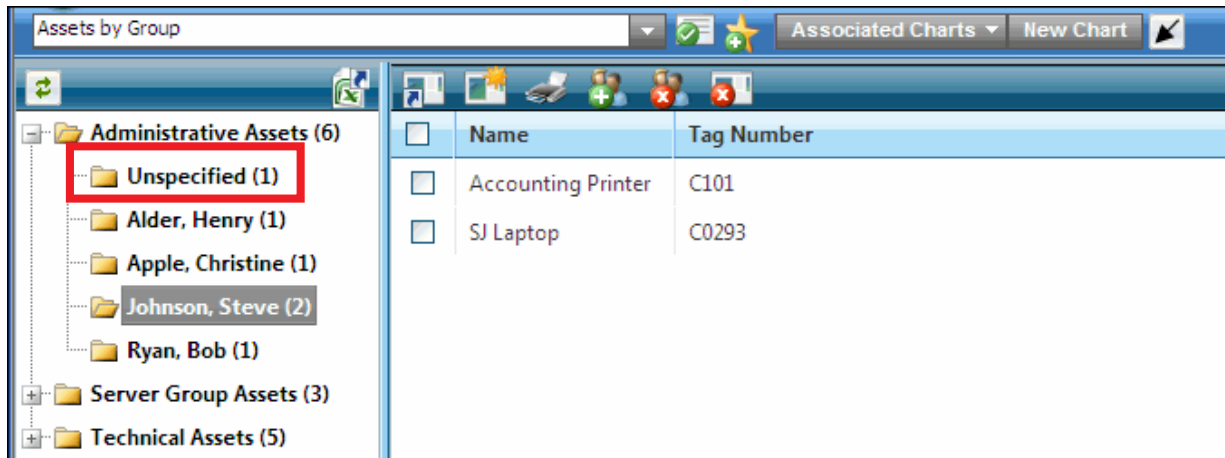
Settings in View Designer

Column Heading	Filter	Folder Level	Column Display Order ^	Sort Order	Sort Direction	Column Width (px)
Owner Name	Add	2	Hidden	2	Ascending	100
Group Name	Add	1	Hidden	1	Ascending	100
Name	Add	None	1	3	Ascending	100
Tag Number	Edit	None	2	Unsorted	None	100

Specifying Null and True/False Text

In the **Null Text** column, enter the text to appear when the data value in the view is nothing or zero. The same principle applies to the **True/False Text** column.

View



	Name	Tag Number
<input type="checkbox"/>	Accounting Printer	C101
<input type="checkbox"/>	SJ Laptop	C0293

Settings in View Designer

Column Heading	Filter	Folder Level	Column Display Order ^	Sort Order	Sort Direction	Column Width (px)	Null Text
Owner Name	Add	2	Hidden	2	Ascending	100	Unspecified
Group Name	Add	1	Hidden	1	Ascending	100	Unspecified

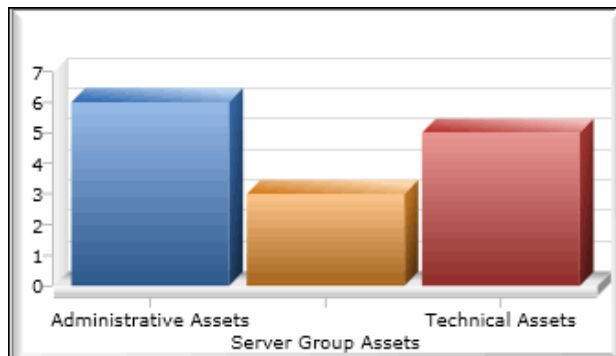
Using the Chart Designer

Use the Chart Designer to create charts based on views of iSupport Asset data. You can make the chart available to all other support representatives or restrict access to specified support representatives and/or groups. You can access the Chart Designer from the Desktop action menu or the New Chart button in the View Designer.

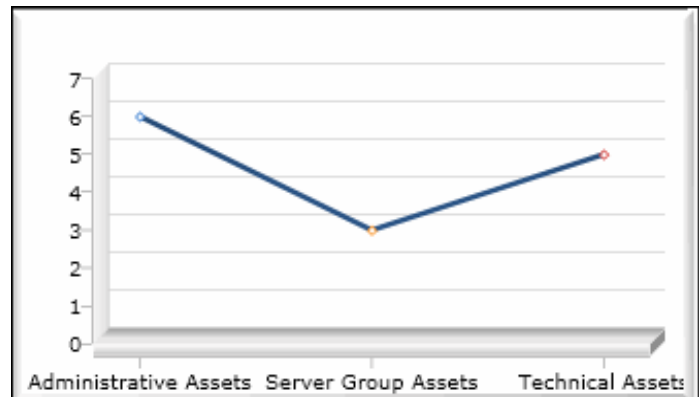
Display Types

Display types include both charts and gauges. You can create the following types of **charts**; the chart colors change dynamically based on value.

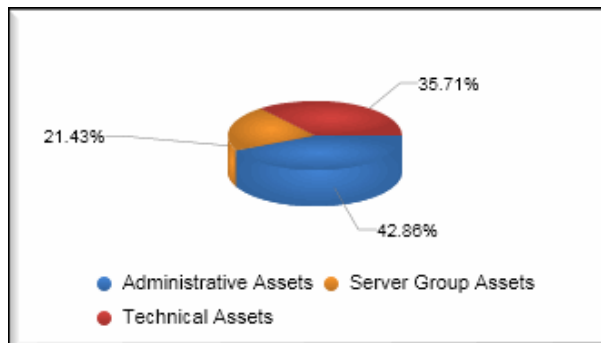
Bar Chart



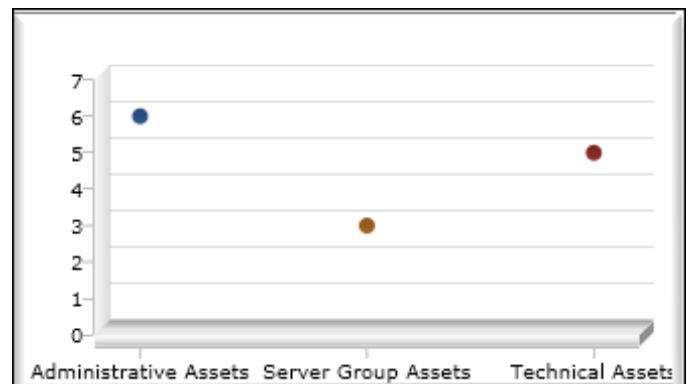
Line Chart



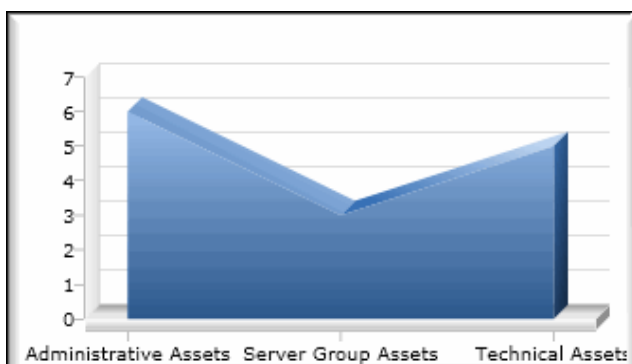
Pie Chart



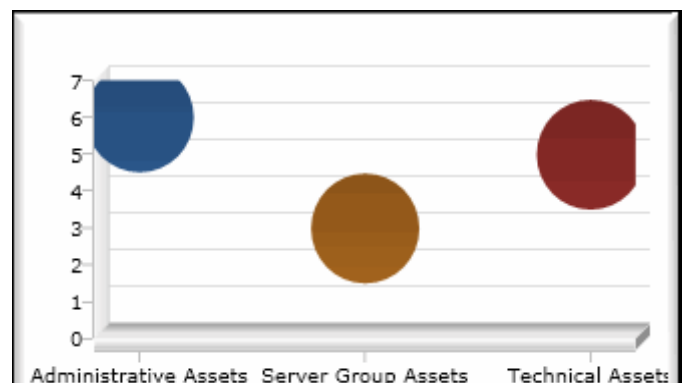
Point Chart



Area Chart

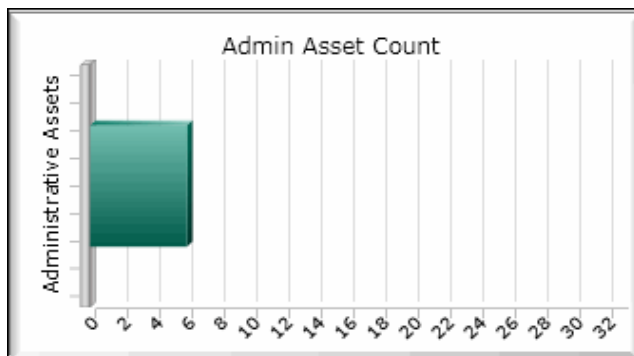


Bubble Chart



You can create the following types of **gauges**.

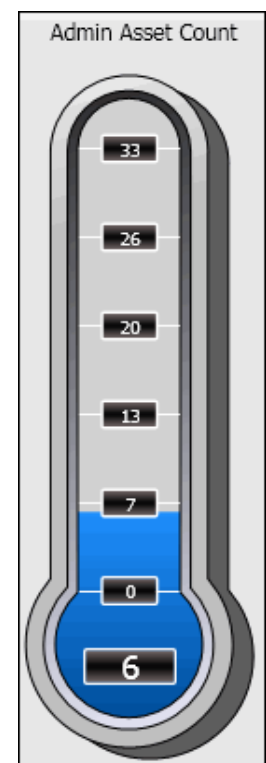
Horizontal Gauge



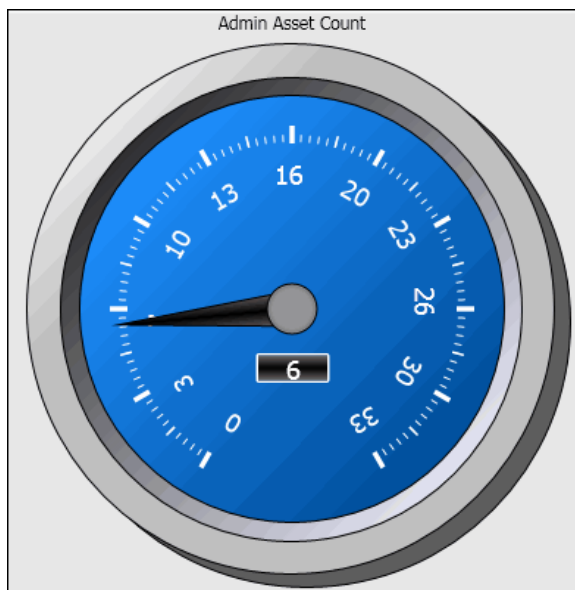
Vertical Gauge



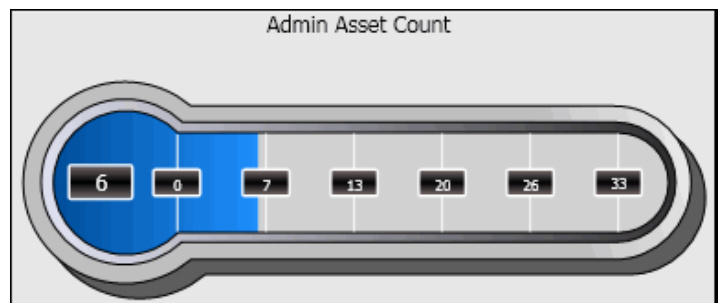
Vertical Thermometer



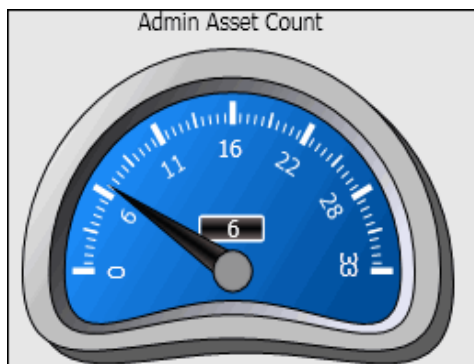
Full Gauge



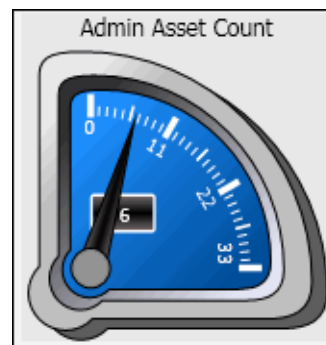
Horizontal Thermometer



Half Gauge



Quarter Gauge



Creating a Chart

Charts are based on view values; to get started, you'll need to use the View and Chart fields to select the view or existing chart on which to base the new chart. If you select an existing chart, the view, value, and other parameters configured for the chart will appear; you can make changes and save with a different chart title. The values in the views appear under Step 2.

Use the dropdown in the View field to select one of your favorite views, a shared view, or a private view that you created previously.

The values in the view appear here; it will change depending on the display type. If you select a Chart display type, the chart will depict multiple types of values (for example, all types of priority).

Step 1: Select a Starting View or Chart:

View: [Edit](#)

Step 2: Select a Value to Chart:

Step 3: Configure Chart Parameters:

Display Type: ☒ Chart ☐ Gauge

Chart Type:

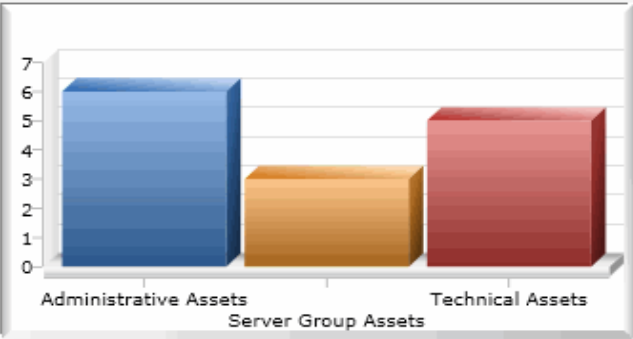
Chart Title:

Access:

Sort Order:

Only Include the Top Group Name Values Based Upon Total Assets: ☐ Yes ☒ No

Only Include the First Group Name Values Based Upon Total Assets: ☐ Yes ☒ No



Asset Group	Count
Administrative Assets	6
Server Group Assets	3
Technical Assets	5

The values in the **Step 2: Select a Value to Chart** section change if creating a Gauge display type.

If you select a Gauge display type, it will depict the amount of a specific value, so you'll need to select a specific value in Step 2 if creating a gauge chart.

Step 1: Select a Starting View or Gauge:

View: Assets by Group Edit

Step 3: Configure Gauge Parameters:

Display Type: ☐ Chart ☒ Gauge


Gauge Type: Half

Gauge Title: Admin Asset Count

Max Gauge Value: 33

Gauge Face Color: #1e90ff ☐ Dynamic ☒ Static

Access: Myself



Step 2: Select a Value to Gauge:

- Name
- Owner Name
- Tag Number
- Group Name
 - Administrative Assets
 - Server Group Assets
 - Technical Assets
 - Add unlisted Group Name
- Total

Use the fields in the **Step 3: Configure Chart Parameters** section to design the chart.

Field	Description
Display Type	<p>Select:</p> <ul style="list-style-type: none"> ■ Chart to depict multiple types of values (for example, all types of priority) in the format of a bar, line, pie, point, area, or bubble chart. ■ Gauge to depict the amount of a specific value in the format of a thermometer or dial.
Chart/Gauge Type	<ul style="list-style-type: none"> ■ If Chart is selected in the Display Type field, you can select one of the following: Bar, Line, Pie, Point, Area, and Bubble. ■ If Gauge is selected in the Display Type field, you can select one of the following: Horizontal, Vertical, Full, Half, Quarter, Horizontal Thermometer, and Vertical Thermometer. <p>See "Display Types" on page 38 for examples of each.</p>
Chart/Gauge Title	Enter a name for the newly created chart or gauge.

Field	Description
Max Gauge Value	This field appears if Gauge is selected in the Display Type field. Enter the number to appear at the top of the gauge.
Gauge Face Color	<p>This field appears if Gauge is selected in the Display Type field and Full, Half, Quarter, Horizontal Thermometer, or Vertical Thermometer is selected in the Chart Type field. Select:</p> <ul style="list-style-type: none"> ■ Static to display a specified color for the gauge; the gauge will remain this color as the amount of the selected value changes. You can choose the color from the color selector or enter the hexadecimal color code. ■ Dynamic to display a gauge that will change color (calculated along the color scale from blue to red) every time the amount of the value changes. If the current value exceeds the number entered in the Max Gauge Value field, the gauge will remain red.
Access	<p>Select:</p> <ul style="list-style-type: none"> ■ Select Myself to keep the chart or gauge private so only you can display it on your Desktop. ■ Select Shared to make the chart or gauge available for other support representatives for displaying on their Desktops.
Sort Order	Select the direction in which to sort the chart: Ascending or Descending.
Only Include the Top (<i>Entity</i>) Values Based on Total (<i>View Entity</i>)	<p>If Chart is selected in the Display Type field, select Yes to only include a specified number of the top grouping. Then enter the number. For example, enter 10 to only include the top ten companies.</p>

Field	Description
Only Include the First (Entity) Values Based Upon Total (View Entity)	If Chart is selected in the Display Type field, select Yes to only include a specified number of values, from the start of the list according to the specified sort order. Then enter the number.

Step 1: Select a Starting View or Chart:
View: [Edit](#)

Step 2: Select a Value to Chart:

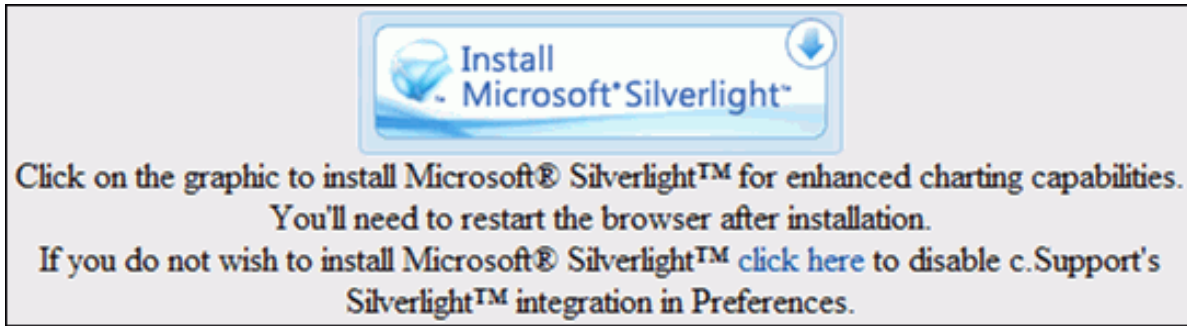
Name
Owner Name
Tag Number
Group Name

Step 3: Configure Chart Parameters:
Display Type: ☒ Chart ☐ Gauge
Chart Type:
Chart Title:
Access:
Sort Order:
Only Include the Top Group Name Values Based Upon Total Assets: ☐ Yes ☒ No
Only Include the First Group Name Values Based Upon Total Assets: ☒ Yes ☐ No
Number of Values:

Category	Value
Administrative Assets	6
Server Group Assets	3
Technical Assets	5

You can utilize Microsoft® Silverlight™ for enhanced charting capabilities; enable use of Silverlight charts via the Use Microsoft® Silverlight™ Charts on the Functionality tab in Global Configuration. If enabled, a Use Microsoft® Silverlight™ Charts field appears on the Basics tab in the Preferences screen for each support representative. Microsoft® Silverlight™ must be

installed locally in order to utilize its capabilities; the following will appear if the Microsoft® Silverlight™ Charts fields are enabled but the Microsoft® Silverlight™ client is not installed.



Depending on your gauge limit, iSupport Asset will attempt to spread that value over the range of gauge tick marks, in whole integer values. Some values may not display well as they are calculated across the gauge face. For example, a quarter gauge, with a limit of 5 has the value 2 displayed twice on the tick marks, changing the value from 5 to 6 will cause the gauge to look correct and convey better information.


When displaying a guage in a component window on the Desktop, you can use the Scale Mode field in the component configuration dialog to stretch or proportionally display the guage.

Creating Alerts

You can configure an alert to appear at the top of the Desktop tabs when a view field reaches a certain threshold. The alert will appear until you select it and click the Acknowledge, Reinstate, or Delete link. Alerts can also be sent via email and page.

New Acknowledge Delete											
<input type="checkbox"/>	Title ▲	Comparison Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
<input type="checkbox"/>	New Customer Profiles	Total		Greater Than	28	29	29	2/1/2010 10:00:07 AM		Barry White	All Customers by Name

Alert criteria is evaluated based on the schedule of the Alert agent.

To configure an alert, click the Alerts link in the menu bar at the top of the Desktop screen or click the Alert  icon in a Desktop content frame.

As with charts, alerts are based on view values; use the View field or the Chart field to select the view or existing chart on which to base the alert. If you select an existing chart, the view and value on which it is based will appear.

Step 1: Select a Starting Chart or View:

View: All Customers by Name

Chart:

Step 3: Configure Alert Parameters:

Alert Title:

Comparison Type:

Threshold:

Reinstatement Interval:

Assets

Companies

Customers

All Customers - Incident Counts

All Customers by Company's Primary Group

All Customers by Name

The values in the view appear in the Step 2: Select a Value to Chart section; select the value to be used as the basis for the alert. Use the fields in the Step 3: Configure Chart Parameters section to specify the title, criteria, and notification options.

Step 3: Configure Alert Parameters:

Alert Title: New Customer Profiles

Comparison Type: Greater Than

Threshold: 28

Reinstatement Interval: 0 Hr(s) 1 Min(s)

Current Value: 30 Customers

Alert via Desktop Tab: ☒ Yes ☐ No

Alert via Email: ☒ Yes ☐ No

Email Custom Notification: New Customer Profiles

Alert via Pager: ☒ Yes ☐ No

Pager Custom Notification: New Customer Profiles

Send to: [Configure...](#)

Field	Description
Alert Title	Enter a name for the alert.
Comparison Type	Select the condition that will use the value in the Threshold field to trigger the alert: Greater Than, Equal, Less Than, Less than or Equal, or Greater Than or Equal.
Threshold	Enter the number that will be used by the value in the Comparison Type field to trigger the alert.
Reinstatement Interval	After an alert is acknowledged, enter the number of hours after which the alert criteria should be automatically evaluated (based on the schedule of the Alert agent). The alert criteria will also be evaluated when a support representative clicks the Reinstate link in the alert display frame.

Field	Description
Current Value	The current number of view items appears; for example, if your view is based on customers, the current number of customers appears.
Alert via Desktop Tab	Select Yes to display the alert on the Desktops of the support representatives and/or support representative groups designated in the Send To field.
Alert via Email	Select Yes to send an alert email to the support representatives and/or support representative groups designated in the Send To field. The email will contain the following: Subject: [iSupport] <alert name> Alert Met Body: Threshold of <comparison type> <threshold> <data source> for <selected value to monitor> met.
Email Custom Notification	Select a custom notification created via the Alert Custom Notifications link under Custom Notifications in the Configuration module.
Alert via Pager	Select Yes to send an alert page to the support representatives and/or support representative groups designated in the Send To field.
Pager Custom Notification	Select a custom notification created via the Alert Custom Notifications link under Custom Notifications in the Configuration module.
Send To	Click the Configure link to display a screen for selecting the support representatives and/or support representative groups that should receive the alert when the criterion is met.

After you click Save, the alert appears on the Desktop as shown below:

New Acknowledge Reinstate Delete											
<input type="checkbox"/>	Title ▲	Comparison Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
<input type="checkbox"/>	New Customer Profiles	Total		Greater Than	28	28	0			Barry White	All Customers by Name
<div> <input checked="" type="checkbox"/> Acknowledged <input type="checkbox"/> Awaiting Tab Acknowledgment <input type="checkbox"/> Not Met </div> <div> <input type="checkbox"/> The underlying view has changed. Edit alert to correct. </div>											

Be sure to schedule the Alert agent after you configure an alert; see the [Miscellaneous Administrative Tasks](#) chapter in the *iSupport Asset Administrator's Guide* for more information.

When the alert is triggered, it appears as shown below to the support representative who configured it or support representatives specified in the Send To field:

<div> Dashboard Customers Companies Assets License Profile Reports Configuration + </div>											
New Acknowledge Delete											
<input type="checkbox"/>	Title ▲	Comparison Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
<input type="checkbox"/>	New Customer Profiles	Total		Greater Than	28	29	29	2/1/2010 10:00:07 AM		Barry White	All Customers by Name
<div> < > </div>											

To acknowledge an alert, select it and click the **Acknowledge** link. The alert appears as shown below:

New Acknowledge Reinstatement Delete

<input type="checkbox"/>	Title ▲	Comparison Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
<input type="checkbox"/>	New Customer Profiles	Total		Greater Than	28	29	29	2/1/2010 10:00:07 AM	2/1/2010 10:26:39 AM	Barry White	All Customers by Name

☒ Acknowledged

☐ Awaiting Tab Acknowledgment

☐ Not Met

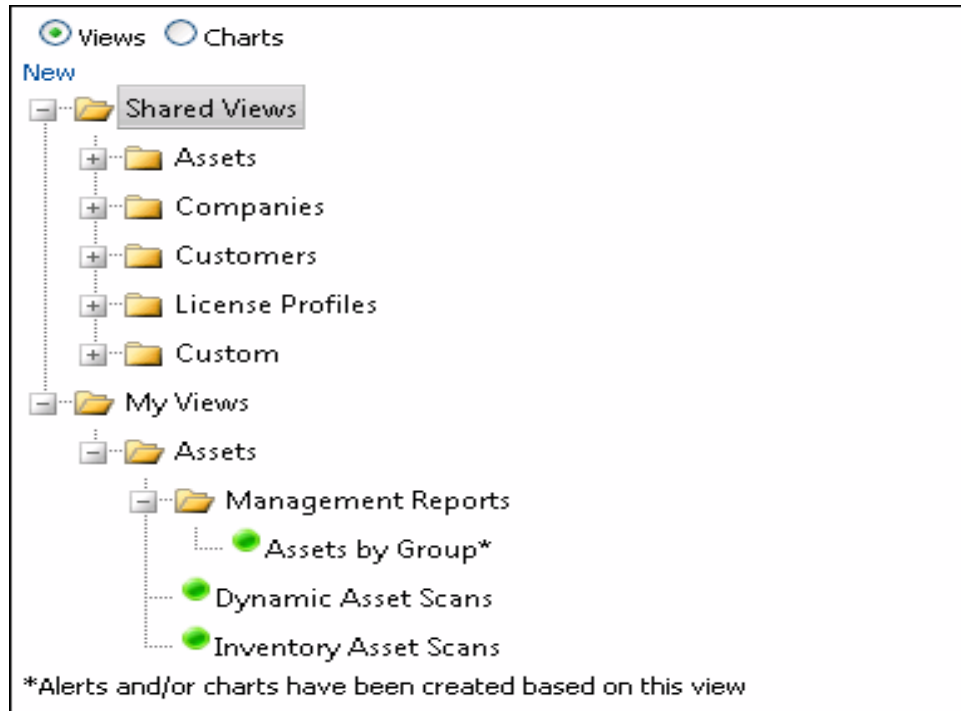
☒ The underlying view has changed. Edit alert to correct.

You can click the **Reinstatement** link in the alert display frame to force the alert criteria to be evaluated the next time the Alert agent runs after the reinstatement interval has started.

If red appears, it is because an alert was based on a column in a view and then that column was later removed from the view. Select the alert in the Title column to change its settings.

Managing View and Chart Content

Use the Content Manager to create, edit, copy, enable/disable, and delete a view or chart. An asterisk indicates that alerts and/or charts are based on a view.



Use the View and Chart radio buttons to select the type of content you wish to work with.

Views

The views that appear under My Views are views that you have personally created via the View Designer.

- To **create** a view, click the New link to display the View Designer.
- To **edit** a view, select the view and click the Edit link to open the view in the View Designer. Note that you cannot modify views that are included in iSupport Asset by default.
- To **copy** a view, select the view and then click the Copy link to open the view in the View Designer with "Copy of" in the View Name field.
- To **disable** a chart (enabled charts appear with a green dot), select the chart and click the Disable link. To enable a chart that has been disabled (it will appear with a red dot), select the chart and click the Enable link.
- To **delete** a view, select the view and click the Delete link.


Charts

The charts that appear under My Charts are charts that you have personally created via the Chart Designer.

- To **create** a chart, click the New link to display the Chart Designer.
- To **edit** a chart, select the chart and then click the Edit link to open the chart in the Chart Designer. Note that you cannot modify charts that are included in iSupport Asset by default.
- To **copy** a chart, select the chart and then click the Copy link to open the chart in the Chart Designer.
- To **disable** a chart (it will appear with a green dot), select the chart and click the Disable link. To enable a chart that has been disabled (it will appear with a red dot), select the chart and click the Enable link.
- To **delete** a chart, select the chart and click the Delete link. Note that you cannot delete charts that are included in iSupport Asset by default.

Performing Searches

Use the Search dropdown on the Desktop to perform a literal search for a character string within all iSupport Asset data. The 10 most recent records will be returned. If only one record matches the search, the record will open automatically when selected.



The screenshot shows the iSupport Asset Desktop interface. At the top, there is a navigation bar with tabs: Dashboard, Customers, Companies, Assets (selected), License Profile, Reports, and Configuration. Below the navigation bar, there is a search bar with the text "Assets for Custom Reporting" and a dropdown menu showing "printer". To the right of the search bar, there is a button labeled "Associated Charts" and a "New Chart" button. Below the search bar, there is a table with the following columns: Asset Type, Name, Owners, Model, Manufacturer, Location, Purchased, and Tag Number. The table contains three rows of data:

Asset Type	Name	Owners	Model	Manufacturer	Location	Purchased	Tag Number
Printer	Accounting Pr...	1	HP1033	HP	Headquarters	6/1/2007	C101
IBM Thinkpad	SJ Laptop	1	Thinkpad	IBM	Headquarters	6/1/2007	C0293
Server	Accounting S...	1	120-S	IBM	Northwest Div...	11/1/2007	15346

The following fields are searched:

Record Type	Fields Included in Global Search
Asset	Name, Comments, Owner, Tag Number, Serial Number
Company	Name, City, State
Customer	First name, Last Name, Customer ID, Company, EUD Login

Using Options on the Function Bar

Specifying Availability

The first name in your login user name appears in the function bar in the upper right corner of the Desktop; click the dropdown to check in and out.

Click to check in and out

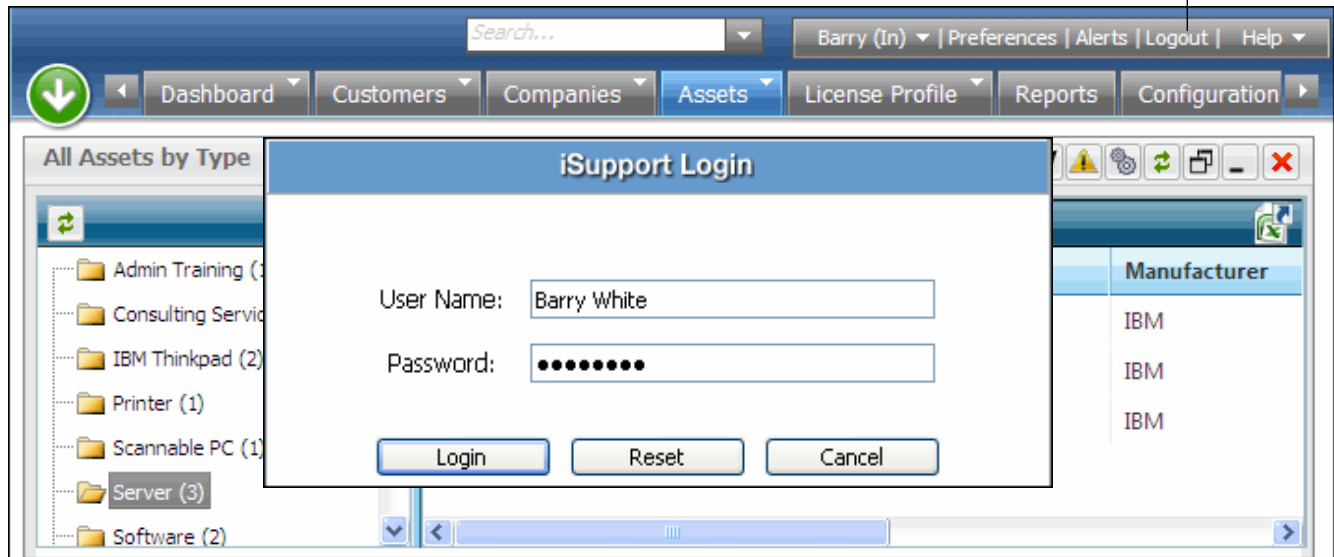
The screenshot displays the software's function bar at the top, which includes a search field, navigation tabs (Dashboard, Customers, Companies, Assets), and a user profile dropdown for 'Barry (In)'. The dropdown menu is open, showing 'In' and 'Out' options. Below the function bar is a table of assets. The table has columns for Asset Type, Name, Owners, Model, Manufacturer, and Location. Two assets are listed: a Printer (Accounting Pr...) and an IBM Thinkpad (SJ Laptop).

	Asset Type	Name	Owners	Model	Manufacturer	Location
<input type="checkbox"/>	Printer	Accounting Pr...	1	HP1033	HP	Headquarters
<input type="checkbox"/>	IBM Thinkpad	SJ Laptop	1	Thinkpad	IBM	Headquarters

Logging In and Out

Use the **Logout** link on the menu bar to log off of the Desktop and display the iSupport Asset Login screen. (This link does not display if using Microsoft Windows-based authentication.)

Click to log off



In the Login dialog, use the Reset button to clear the User Name and Password fields. Your user name and password are set up in your Support Representative Profile record, and you can change your password via the Preferences option.



The Password field in the Login dialog is case sensitive.

Setting Preferences for the Desktop

Use the **Preferences** link to set display, password, tab, view, and signature block options for your Desktop.

Click to display the Preferences screen

The screenshot shows the iSupport Asset Desktop interface. At the top is a navigation bar with a search field, a user dropdown (Barry (In)), and links for Preferences, Alerts, Logout, and Help. Below this is a secondary navigation bar with buttons for Dashboard, Customers, Companies, Assets, and License Profile. The main content area is titled 'Details' and contains several settings:

- Display Time Zone:** A dropdown menu set to '(GMT-08:00) Pacific Time (US & Canada)'.
- To reset your password, enter values below.** This section includes three text input fields for 'Current Password', 'New Password', and 'Confirm Password'.
- Default Desktop Tab:** A dropdown menu set to 'Dashboard'.
- Text Editor Toolbar:** A dropdown menu set to 'Popup'.
- Four checkboxes for toolbar behavior:
 - ☐ Tab key inserts tabbed spaces in text editor fields
 - ☒ Always show the Reports tab
 - ☒ Always show the Configuration tab
 - ☒ Use Microsoft® Silverlight™ Charts

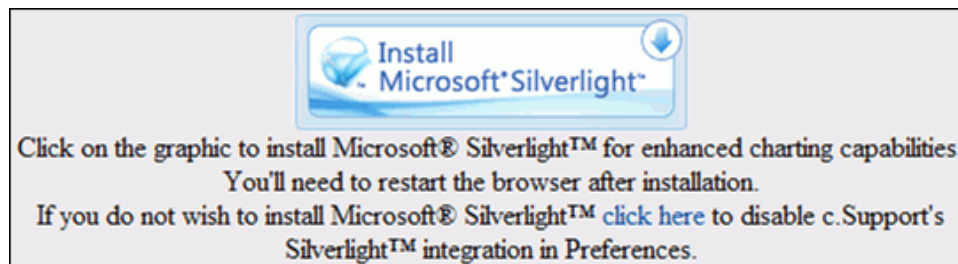
At the bottom, a note states: '*The Display Time Zone is for display purposes only. Business hour escalation and statistics are based on the assignee's support center time zone setting.'

Setting Your Display Time Zone, Password, and Other Desktop Options

On the Details tab, you can:

- Select the display time zone to use for all date/time stamps. This is for display purposes only on your Desktop client.
- Change your password to log into iSupport Asset. The new password will be updated in your Support Representative record.
- Use the **Default Desktop Tab** field to set the tab to display by default on the Desktop when you log in. Note that tabs can be set as default in the Support Representative Tabs screen in the Configuration module.
- Use the **Text Editor Toolbar** field to control whether to display the text editor toolbar when you place your cursor in a toolbar-enabled field (Popup), retain display of the toolbar over those fields (Always Show), or prevent display of the toolbar in those fields (Never Show). Note that if you select Never Show, you can still display the toolbar by clicking the field label link that displays a larger window.

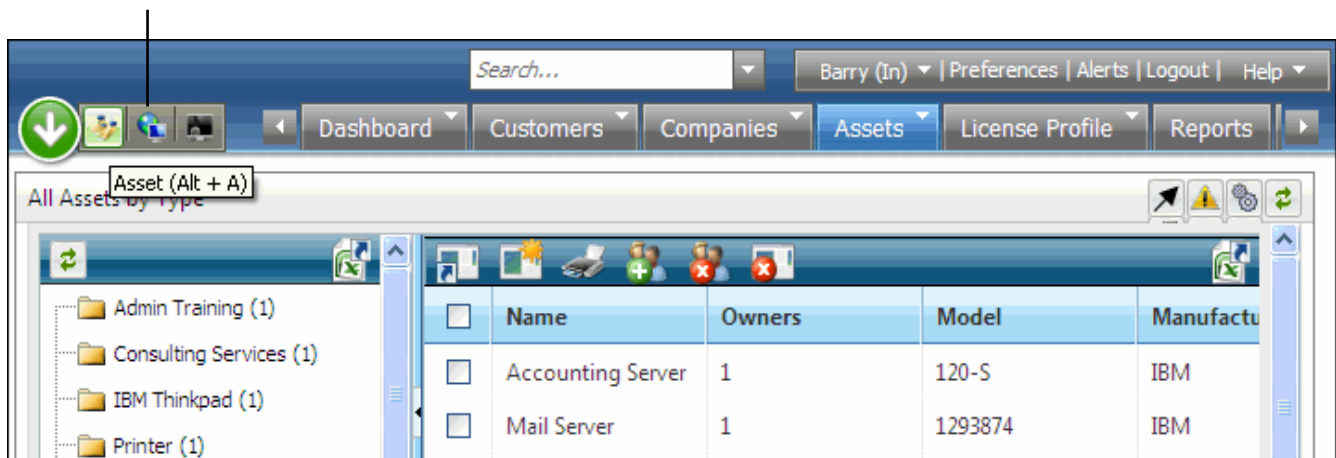
- Select the **Tab Key Inserts Tabbed Spaces in Text Editor Fields** checkbox to enable the Tab key to insert spaces (instead of moving between fields) in fields with a text editor toolbar (such as the Issue Description and Issue Resolution fields). See [“Using the Text Editor Toolbar” on page 13](#) for more information on the text editor toolbar.
- Use the **Always Show the Reports Tab** option to retain the Reports tab on the Desktop tab bar for creating and viewing SQL reports.
- Use the **Always Show the Configuration Tab** option to retain the Configuration tab on the Desktop tab bar for accessing the iSupport Asset Configuration module.
- If use of Silverlight Charts is enabled on the Functionality tab in Global Configuration, the **Use Microsoft® Silverlight™ Charts** field appears on the Details tab in the Preferences screen. Select this checkbox to utilize Microsoft® Silverlight™ for enhanced charting capabilities. Microsoft® Silverlight™ must be installed locally in order to utilize its capabilities; the following will appear if the Use Microsoft® Silverlight™ Charts fields are enabled but the Microsoft® Silverlight™ client is not installed:



Configuring a Create Toolbar

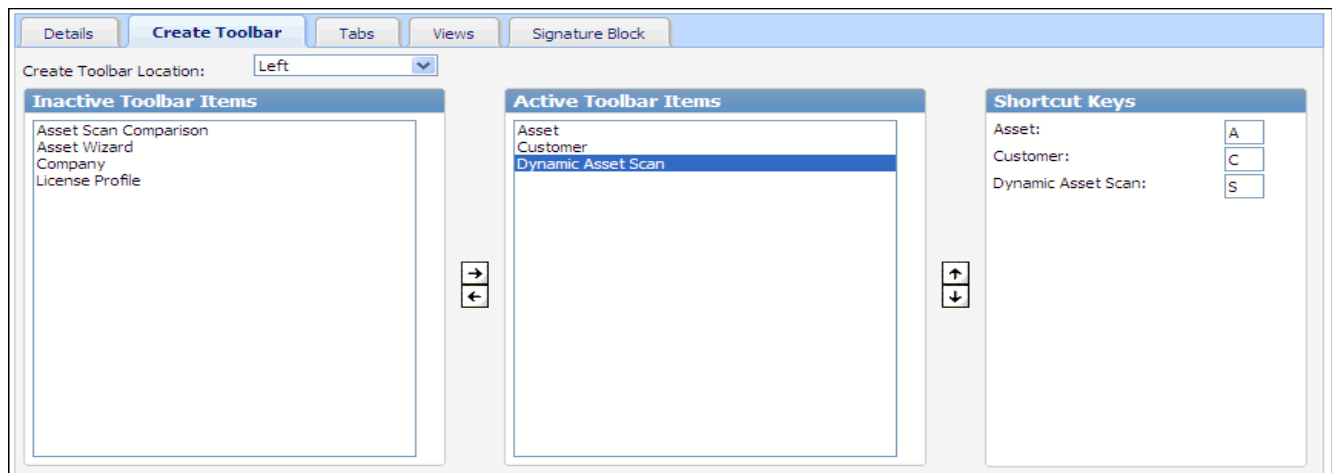
Use the Create Toolbar tab to add a toolbar with icons for creating records.

Customizable Create Toolbar



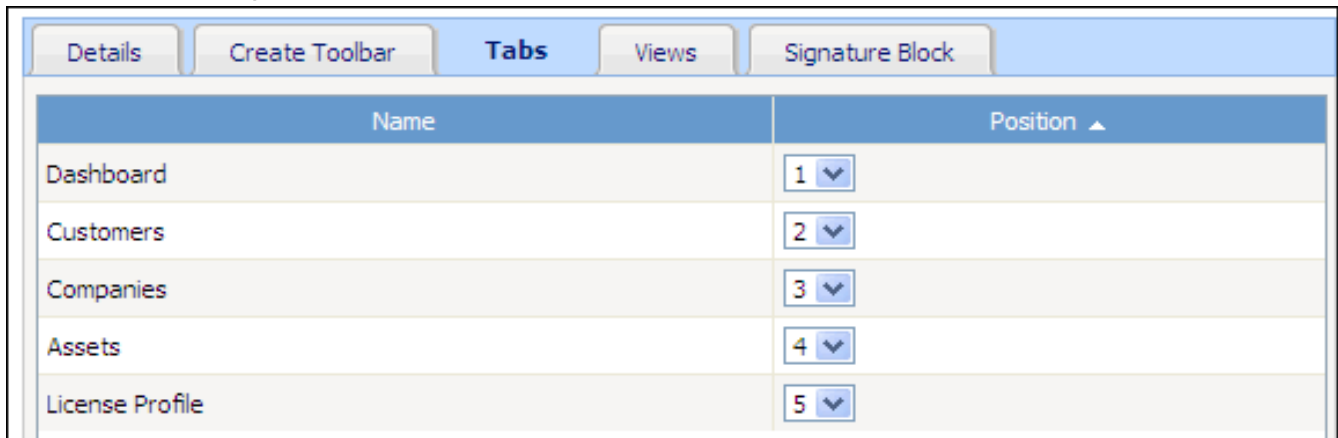
On the Create Toolbar tab in the Preferences screen, specify the position (left, right, or above the tabs) of the toolbar in the Create Toolbar Location field. In the Inactive Toolbar Items section, select the record types to include on the toolbar, and then click the icon. In the Shortcut Keys section, assign an alphanumeric key (0-9 a-z) to each item. This key is used with the Alt key for

Internet Explorer, Google Chrome, and Apple Safari, and it used with the Alt Shift keys for Mozilla Firefox.



Reordering Tab Position


Use the Tabs tab to reposition the tabs on your Desktop. Select the number for the position of the tab on the Desktop.

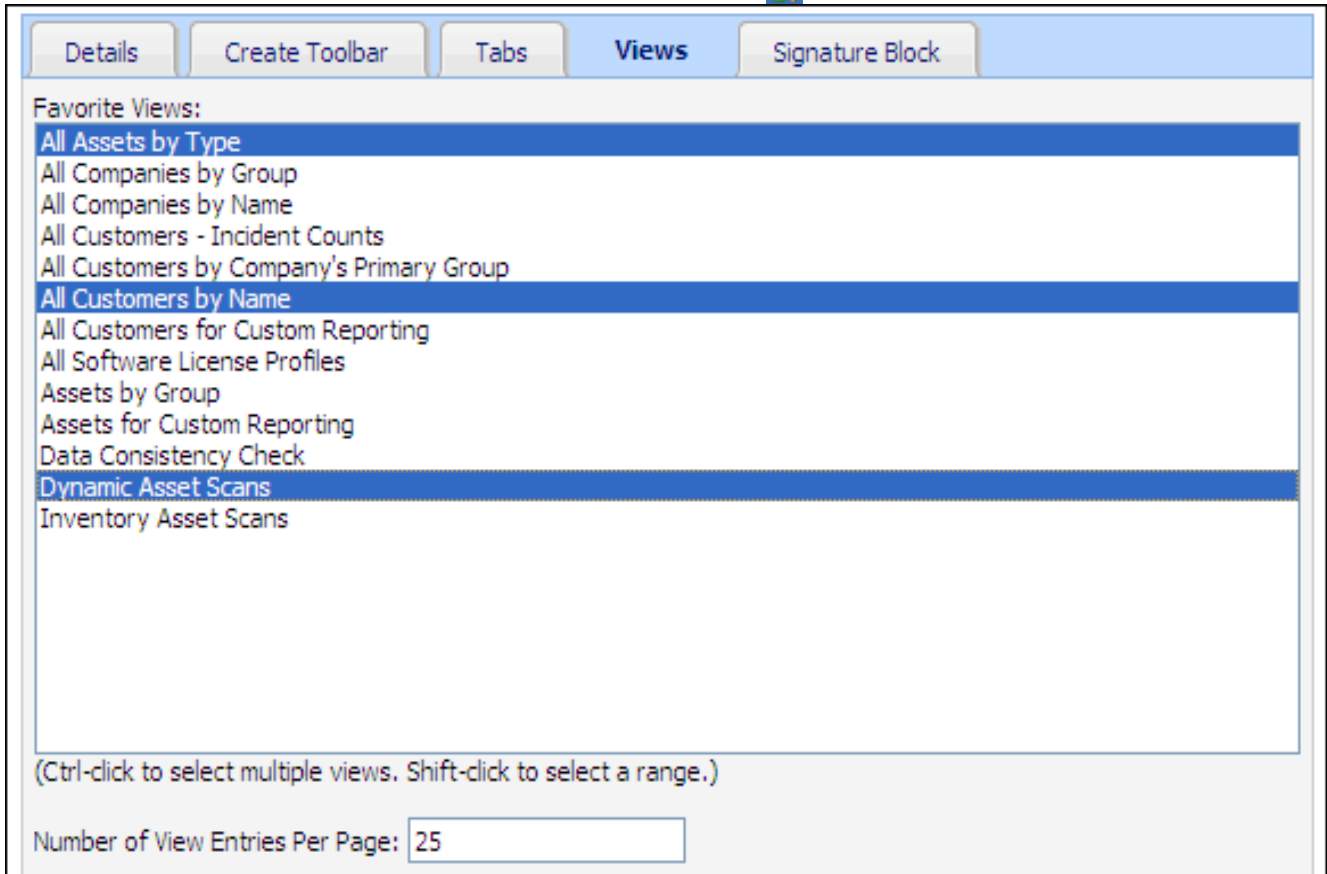


Designating Your Favorite Views

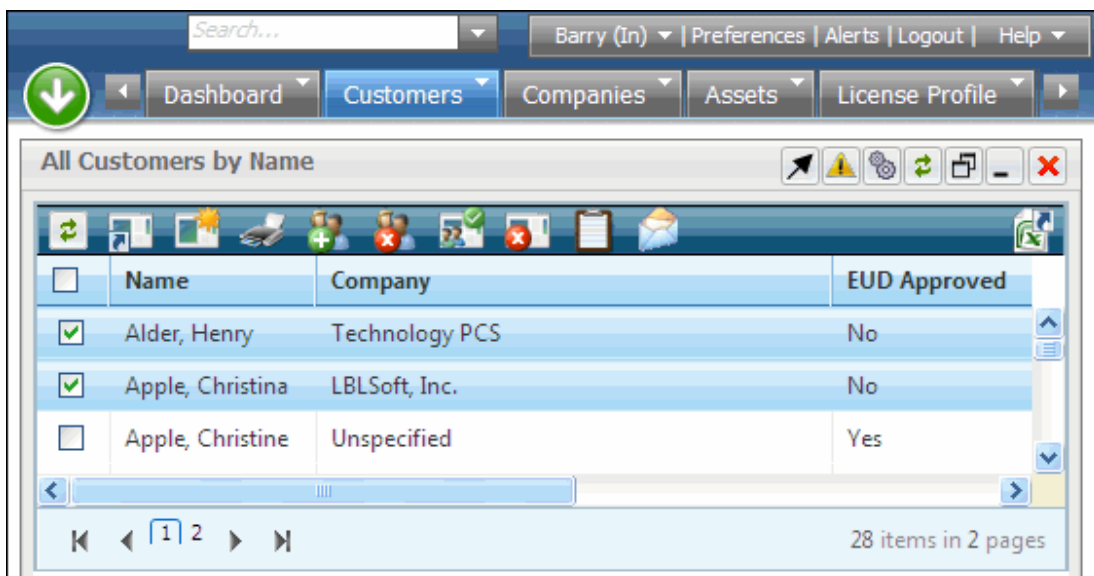
Use the Views tab in the Preferences screen to:

- Specify a set of favorite views; this list typically includes the views that you use most frequently. These views will appear in the Favorite Views folder at the top of the View dropdown list available in the View Designer, Chart Designer, Alert configuration, and tab content

configuration frame. To select multiple entries, hold down the Ctrl key and click on each entry. You can also add to this list via the Add to Favorites  icon on a Desktop tab.



- Specify the number of entries to display at a time. When the number of entries exceeds the specified number of view entries per page, a set of view paging links appear at the bottom of the entries as shown below:



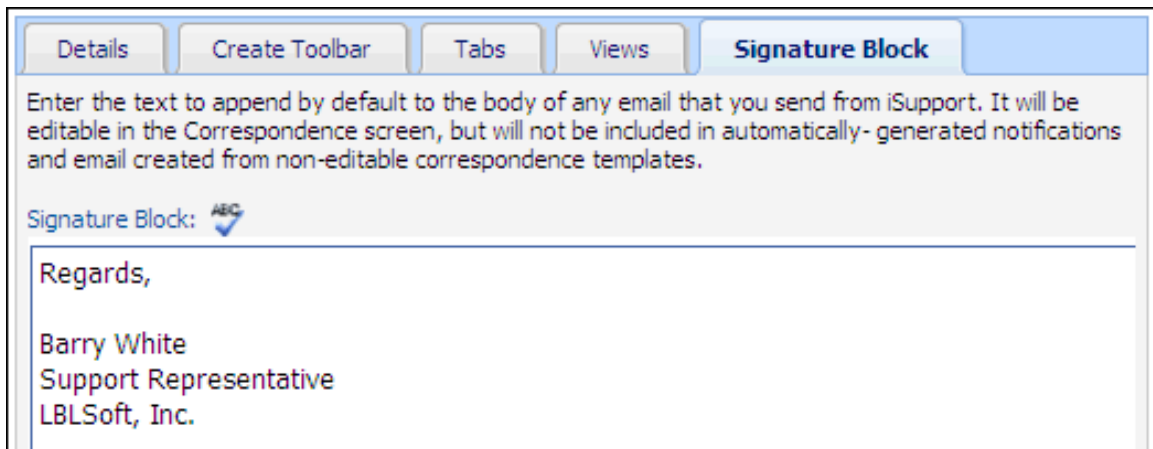
View paging links

You can use the following keyboard shortcuts for paged views on the Desktop:

- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page
- Press Alt < to jump back to the first page

Entering Your Signature Block

Use the Signature Block tab in the Preferences screen to enter text to append to all editable email that you send from iSupport Asset.

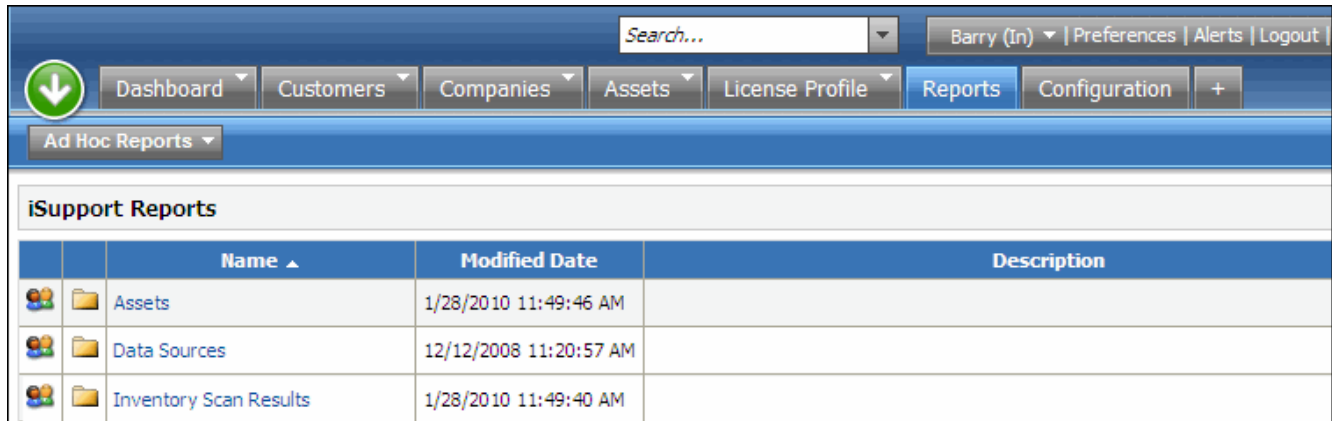





The text editor toolbar appears when you place your cursor in the field or click the Signature Block link to display a larger window. See [“Using the Text Editor Toolbar” on page 13](#) for more information.

You do not need to enter blank lines before the text; two blank lines will be inserted before the signature block when a blank correspondence is initiated. If an editable correspondence template is selected in the Customer Profile screen, one blank line is inserted automatically before the signature block. You can edit the signature block text in the Correspondence screen if needed.

Creating and Viewing SQL Reports

If Report Viewer permission is enabled in your Support Representative Profile record in iSupport Asset, you can view SQL reports on the Desktop via the Reports tab or a Report Viewer frame on the Desktop. You can retain the Reports tab on your Desktop via an option in the Preferences screen.

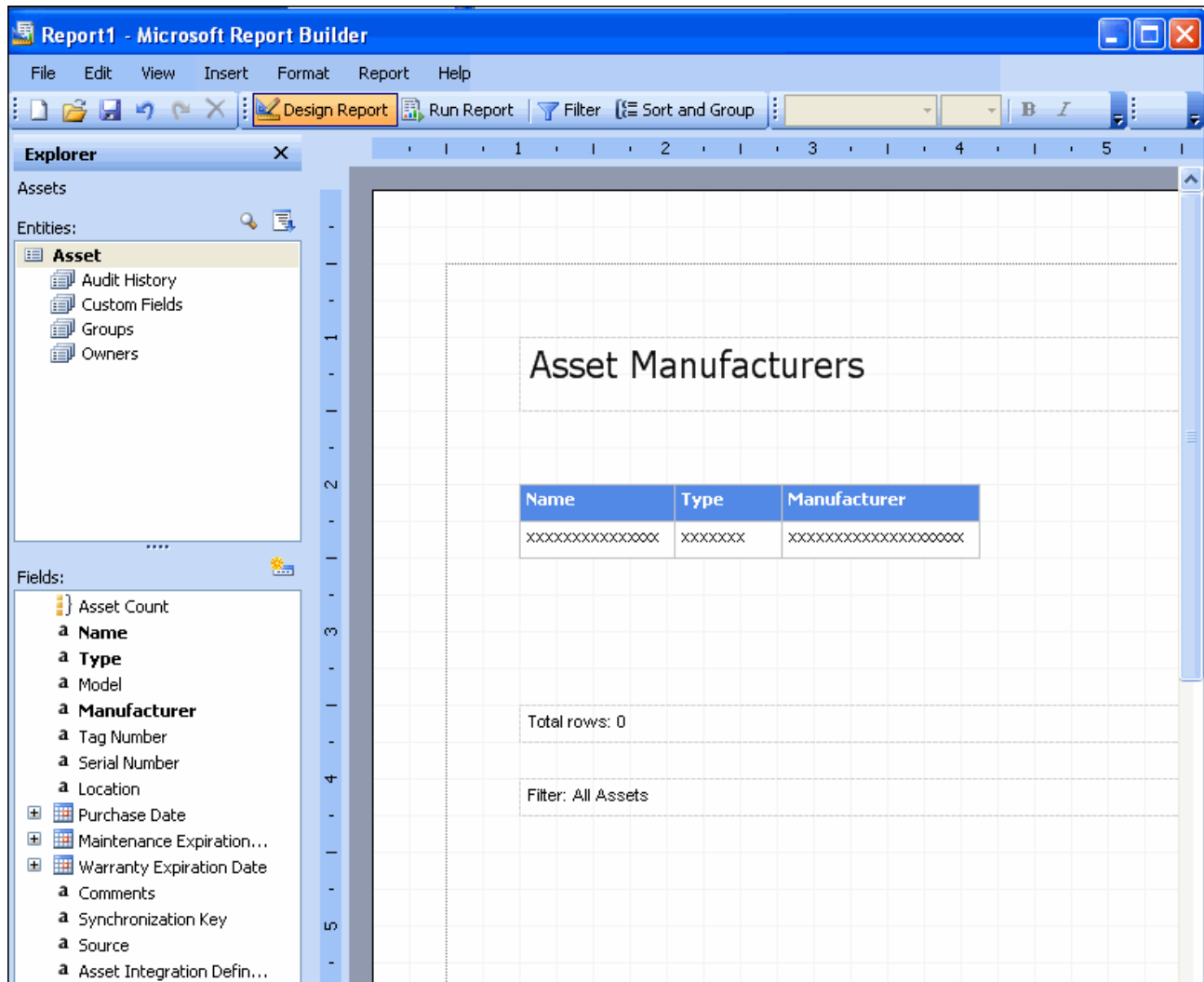


	Name ▲	Modified Date	Description
	Assets	1/28/2010 11:49:46 AM	
	Data Sources	12/12/2008 11:20:57 AM	
	Inventory Scan Results	1/28/2010 11:49:40 AM	

Access to SQL-based iSupport Asset reports and report folders can be restricted via group access permissions; if the Manage Folders and Reports permission is enabled in your Support Representative Profile record, the Group Access  icon will appear next to the folders and reports on the iSupport Asset Reports tab.

iSupport Asset includes several report models for iSupport Asset database fields, tables, and relationships. These models can be used to create ad hoc reports via Microsoft Report Builder or custom reports via Microsoft Report Designer. If you have iSupport Asset's Ad Hoc Reports permission, you can access Microsoft Report Builder via the Desktop by selecting New Report on the Ad Hoc Reports menu on the Reports tab. (Note: This feature is not enabled for Express

editions of Microsoft SQL Server.) For more information, select Documentation on the Ad Hoc Reporting menu on the Desktop Reports tab.



3 Working with Customer Profiles

Overview

The Customer Profiles screen enables you to record customer information that can be used in all iSupport Asset functionality.

The screenshot displays the iSupport Customer Profile interface. At the top, there are tabs for 'Selection', 'New', and 'Find', and a user icon. Below this is a toolbar with icons for file operations. The main form contains the following fields:

- First Name:
- Last Name:
- Email:
- Phone:
- Company:

To the right of these fields is an 'Avatar' section showing a photo of a man with the text 'Add Remove' below it.

Below the main form is a row of tabs: 'Details', 'Address', 'History', 'Groups', 'Others to Notify', 'Assets', 'Custom Fields', 'Attachments', and 'Miscellaneous'. The 'Details' tab is currently selected.

Under the 'Details' tab, the following fields are visible:

- Customer ID:
- Title:
- Fax:
- Cellular:
- Location:
- Manager:
- Department:

On the right side of the 'Details' tab, there is a section for 'Additional Email Addresses' with a text area containing 'sjohnson@lblsvc.com' and 'Add Remove' links.

Customer Groups

If you have the appropriate permissions set up in the configuration module, you can add a customer to one or more customer groups defined in the Configuration module. This allows you to generate correspondence and assign assets to a group of customers. You can use the Groups tab in the Company screen to assign all of a company's current customers to a group. You can view customer group membership on the Desktop.

Others to Notify

If enabled in configuration, you can set up an Others to Notify list for a customer for use in sending correspondence to those not directly involved in the process. An Others to Notify list can be set up for an individual customer, all customers in a company, and an individual record.



If permissions are enabled during configuration, you may not be able to create a new Customer Profile record, view, edit, or delete an existing Customer Profile record.

Customer Data Source Integration

iSupport Asset can integrate with Microsoft Active Directory®, an LDAP source, Microsoft® Business Solutions Customer Relationship Management (CRM), Domino Directory, and/or a Microsoft SQL Server database as a source of customer information.

All integration features are set up in the Configuration module. The *iSupport Asset Administrator's Guide* contains more information.

Active Directory Integration

iSupport Asset's Active Directory® integration enables an agent that updates the records in iSupport Asset Customer Profiles with the information in one or more Active Directory sources. This synchronizes the data in iSupport Asset Customer Profiles with the data in Active Directory. If enabled, the following occurs when the agent runs:

- If there is an entry in Active Directory that does not exist in Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Active Directory, it must contain a first name, last name, and email address. The password will not be changed by re-enabling Active Directory integration.
- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, depending on the configured order of precedence, the Customer Profiles record is updated with the latest information from Active Directory. If a Customer Profile entry has already been synchronized with Active Directory, the Last Modified dates are compared and the Customer Profile is updated with the latest information.
- If an entry is deleted in the Active Directory, the record will be flagged for deletion.

The interval at which the agent runs is set up in the Configuration module. The Active Directory Integration feature does not modify the contents in Active Directory in any way.



If a Customer Profile record has been synchronized with Active Directory, the synchronized fields (except for Secondary User Name) cannot be edited in the Customer Profiles screen. These fields can only be edited via Active Directory.

The *iSupport Asset Administrator's Guide* contains information about setting up iSupport Asset's Active Directory Integration features.

LDAP Integration

The LDAP integration feature enables an agent that, based on the email address and first and last name, updates the records in iSupport Asset Customer Profiles with the information in one or more LDAP sources such as e-Directory. This synchronizes the data in iSupport Asset Customer Profiles with the data in the LDAP source. The following occurs when the agent runs:

- If there is an entry in the LDAP source that does not exist in Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from the LDAP source, it must contain a first name, last name, and email address.
- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, depending on the configured order of precedence, the Customer Profiles record is updated with the latest information from the LDAP source. If a Customer Profile entry has already been synchronized with the LDAP source, the Last Modified dates are compared and the Customer Profile is updated with the latest information.
- If an entry is deleted in the LDAP source, the record will be flagged for deletion.



If a Customer Profile record has been synchronized with the LDAP source, the synchronized fields (except for Secondary User Name) cannot be edited in the Customer Profiles screen. These fields can only be edited via the LDAP source.

When the feature is enabled, the agent runs immediately and then on an interval basis according to the selection in the LDAP Synchronization field. The LDAP Integration feature does not modify the contents in the LDAP source in any way.

Microsoft® CRM Integration

iSupport Asset's Microsoft Business Solutions Customer Relationship Management (CRM) Integration feature enables an agent that updates the records in iSupport Asset Customer Profiles with the information in Microsoft CRM.

- If there is an entry in Microsoft CRM that does not exist in iSupport Asset Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Microsoft CRM, it must contain a first and last name and email address.

- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, the Customer Profiles record is updated with the latest information from Microsoft CRM. If a Customer Profile entry has already been synchronized with Microsoft CRM, the Customer Profile is updated with the latest information.



If a Customer Profile record has been synchronized with Microsoft CRM, the synchronized fields cannot be edited in the Customer Profiles screen. These fields can only be edited via Microsoft CRM.

iSupport Asset's Microsoft Business Solutions Customer Relationship Management (CRM) Integration feature is set up in the Configuration module. The Microsoft CRM Integration feature does not modify the contents in Microsoft CRM in any way.

The *iSupport Asset Administrator's Guide* contains more information about setting up Microsoft CRM integration.

Domino Directory Integration

iSupport Asset's Domino Directory integration enables an agent that updates the records in iSupport Asset Customer Profiles with the information in a specified IBM Lotus®/Domino™ Directory (previously termed "NAB"). (Note: The customer's login information cannot be populated.)

Integration With Other Remote Databases

iSupport Asset's Remote Database integration enables an agent that updates the records in iSupport Asset Customer Profiles with the information in a specified Microsoft SQL Server database that contains customer data.

Entering Customer Profiles

To access the Customer Profile screen, select Create | Customer on the Desktop action menu.

Selection New Find iSupport


First Name: Steve

Last Name: Johnson

Email: sj@lblsoft.com

Phone: 360-397-1004

Company: LBLSoft, Inc.

Avatar:  Add Remove

Details Address History Groups Others to Notify Assets Custom Fields Attachments Miscellaneous

Customer ID: 8675309

Title: Accounting Manager

Fax: 360-397-1007

Cellular: 360-397-1000

Location: Headquarters

Manager: John Collins

Department: Administration

Additional Email Addresses: Add Remove

sjohnson@lblsvc.com

Field	Description
First Name Last Name	Enter the customer's name. These fields are required in order to save the record.
Email	Enter the customer's email address. This is a required field. If enabled, notifications will be sent to this address. Note: each customer profile must have a unique email address/first name/last name combination.
Phone	Enter the customer's telephone number.
Company	Click the Company link to select an existing company or enter a new company name. To enter complete company information, access the Company screen from the Desktop.
Avatar	Click the Browse button to select a picture to associate with the customer.

Entering Details

Use the Details tab to enter miscellaneous information about the customer.

Field	Description
Customer ID	Enter an identification number for the customer.

Field	Description
Title	Enter the customer's title.
Fax	Enter the customer's fax number. This number is used for reference.
Cellular	Enter the customer's cellular telephone number.
Location	Enter the location in which the customer works.
Manager	Enter the customer's manager. This information is used for reference.
Department	Enter the department in which the customer works.
Additional Email Addresses	Click the Add link to enter additional email addresses for reference purposes.

Entering Address Information

Use the Address tab to enter the customer's address. This information is used for reference purposes. You can click the Open Map link to search Google Maps® using the specified address, city, state, and ZIP/Postal code. This functionality requires an Internet connection.

The screenshot shows a web-based form with a top navigation bar containing tabs: Details, Address (selected), History, Groups, Others to Notify, Assets, Custom Fields, and Attachments. Below the navigation bar is a sub-tab labeled 'Miscellaneous'. The main form area contains the following fields:

- Address:** A text input field containing '10000 NE 7th Avenue'. Below it is a smaller text input field containing 'Suite 401'.
- City:** A text input field containing 'Vancouver'.
- State:** A text input field containing 'WA'.
- ZIP/Postal:** A text input field containing '98685'.
- Country:** A text input field containing 'USA'.

At the bottom left of the form area, there is a blue link labeled 'Open Map'.

Field	Description
Address	Enter the customer's street address or post office box.
City	Enter the city in which the customer is located.
State	Enter the state in which the customer is located.
ZIP/Postal	Enter the ZIP code or postal code for the customer's address.
Country	Enter the country in which the customer is located.



Viewing Audit History

After you save a Customer Profile record, an entry appears on the Audit History tab. This tab includes a notation of every action performed on the record with the date, time, and author stamp.

The screenshot shows the 'History' tab selected in a customer profile interface. The tab bar includes 'Details', 'Address', 'History', 'Groups', 'Others to Notify', 'Assets', 'Custom Fields', and 'Attachments'. Below the tabs, the 'Miscellaneous' section displays the following audit history:

- 22-Oct-2008 2:39:25 PM - Barry White
 - Changed Cost Center **From:** To: Accounting
 - Changed Job Function **From:** To: Manager

Assigning to Customer Groups



Customer groups enable you to generate correspondence and assign assets to a group of customers. If you have Customer | Editor | Edit permission, you can add a customer to a group or remove a customer from a group. This can also be accomplished for selected customers and companies using the Add to Group  and Remove From Group  icons in customer views on the Desktop.

The screenshot shows the 'Groups' tab selected in a customer profile interface. The tab bar includes 'Details', 'Address', 'History', 'Groups', 'Others to Notify', 'Assets', 'Custom Fields', and 'Attachments'. Below the tabs, the 'Miscellaneous' section displays two panels:

- No Membership**: Lists customer groups set up in the Configuration module:
 - Administrators
 - Customer Advisory Board
 - Executive Mgmt Team *
- Membership**: Shows the current group assignment. The 'Primary' field is set to 'Adobe Users'. Below it, 'Platinum Support Members' is listed.

Between the two panels are four arrow icons: a right arrow, a left arrow, a right arrow, and a left arrow, used for moving groups between the two panels.

* Denotes groups associated with the customer's company

Field	Description
No Membership Membership	<p>The No Membership field includes customer groups set up in the Configuration module.</p> <ul style="list-style-type: none">■ To assign a customer to a group, select the group in the No Membership field and click the  icon.■ To remove a customer from a group, select the group in the Membership field and click the  icon.

Asterisks will appear next to any groups associated with the company. Groups are associated with companies for the purpose of easy customer assignment.

If customer groups are associated with a selected company, the following prompt will appear when you save a new record in the Customer Profile screen:

The screenshot shows the iSupport Customer Profile screen. The main form contains fields for First Name (Steve), Last Name (Johnson), Email (sj@lblsoft.com), Phone (360-397-1004), and Company (LBLSoft, Inc.). An avatar of a man is shown with 'Add Remove' links. Below these are tabs for Details, Address, Attachments, and Miscellaneous. The Details tab is active, showing Customer ID (8675309), Title (Accounting Manager), Fax (360-397-1007), Cellular (360-397-1000), Location (Headquarters), Manager (John Collins), and Department (Administration). A Windows Internet Explorer dialog box is overlaid on the form, asking: 'Apply the company's associated groups to this customer's group membership? Selecting Cancel will not affect the customer's group membership.' with OK and Cancel buttons.

Click OK to assign the customer to the company's associated groups (those with asterisks).

Specifying Others to Notify

If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and support representatives that are not directly involved to be sent event notifications and other correspondence. An Others to Notify list can be set up for an individual customer or all customers in a company. This list can be viewed by clicking the All radio button.

To add someone to the Others to Notify list for a customer, click the Add link. Use the Remove link to delete anyone from this list.

The screenshot shows the iSupport Others to Notify screen. It has tabs for Details, Address, History, Groups, Others to Notify (selected), Assets, Custom Fields, and Attachments. Below the tabs is a 'Miscellaneous' section with 'Add Remove' links and radio buttons for 'Customer' (selected) and 'All'. A table lists the Others to Notify list:

<input type="checkbox"/>	Last Name ▲	First Name	Email	Company
<input type="checkbox"/>	Adams	John	ja@lblsoft.com	LBLSoft, Inc.

When you create a correspondence document from the Customer Profile screen or select a customer on the Desktop, you can choose to copy (CC) those in the selected customer's Others to

Notify list. Note that the correspondence will also be sent to the Others to Notify list of the company assigned to the customer.

An Others to Notify list can be set up for a specific customer; however, a record-specific list is only a subset. The comprehensive Others to Notify list also includes any Others to Notify lists for the selected company. When an event (for example, save or close) notifications are set up in the Configuration module, Others to Notify lists can be included in the To field or in the CC field. The comprehensive Others to Notify list will be used for these system-generated notifications as well as for any correspondence sent via the Desktop or applicable entry screen.

Associating Assets

You can associate assets with Customer and Company records; this enables targeted customer and asset lookups. Click the Add link to select the asset(s) to associate with the customer.

Details	Address	History	Groups	Others to Notify	Assets	Custom Fields	Attachments
Miscellaneous							
Add Remove							
<input type="checkbox"/>	Name ▲	Type	Tag Number	Serial Number			
<input type="checkbox"/>	Accounting Printer	Printer	C101	656-8987654-54545			
<input type="checkbox"/>	SJ Laptop	IBM Thinkpad	C0293	987654-65435-6546			

Completing Custom Fields

If custom fields have been set up for the Customer Profile screen, the Custom Fields tab will display as shown in the example below. You may be required to enter information in these fields.

Details	Address	History	Groups	Others to Notify	Assets	Custom Fields	Attachments
Miscellaneous							
Customer Advisory Information: <input type="text" value="Please verify address."/>							

Attaching Files

To attach a file to the customer profile, click on the Browse button in the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.

The screenshot shows the 'Attachments' tab selected in a customer profile interface. At the top, there are tabs for Details, Address, History, Groups, Others to Notify, Assets, Custom Fields, and Attachments. Below the tabs, there is a 'Miscellaneous' section. In this section, there is an 'Attachment:' label followed by a text input field and two buttons: 'Browse...' and 'Add'. Below this, there is a table with three columns: 'File Name', 'Size', and 'Type'. The table contains one row with the file 'CompanyContract.pdf', a size of '3840.498K', and a type of 'application/pdf'. To the right of the table, there is a 'Delete' button.

Completing the Miscellaneous Tab

Use the Miscellaneous tab to enter comments that will display when the customer is selected.



The screenshot shows the 'Miscellaneous' tab selected in a customer profile interface. At the top, there are tabs for Details, Address, History, Groups, Others to Notify, Assets, Custom Fields, and Attachments. Below the tabs, there is a 'Miscellaneous' section. In this section, there is a 'Source:' label followed by the text 'Direct Entry'. Below this, there is a 'Comments:' label followed by a checkmark icon and a text input field. The text input field contains the text 'This customer reports to the president of the company.'

Field	Description
Source	<p>One of the following will display in this field:</p> <ul style="list-style-type: none">■ Direct Entry if the profile was created via the Desktop.■ Active Directory. If there is an entry in an Active Directory® source that does not exist in Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Active Directory®, it must contain a first name, last name, and email address.■ Microsoft CRM. If there is an entry in Microsoft® CRM that does not exist in Customer Profiles, the entry is created in Customer Profiles.■ Domino Directory. If there is an entry in Domino Directory that does not exist in Customer Profiles, the entry is created in Customer Profiles.■ Other RDB. If there is an entry in an RDB source that does not exist in Customer Profiles, the entry is created in Customer Profiles.

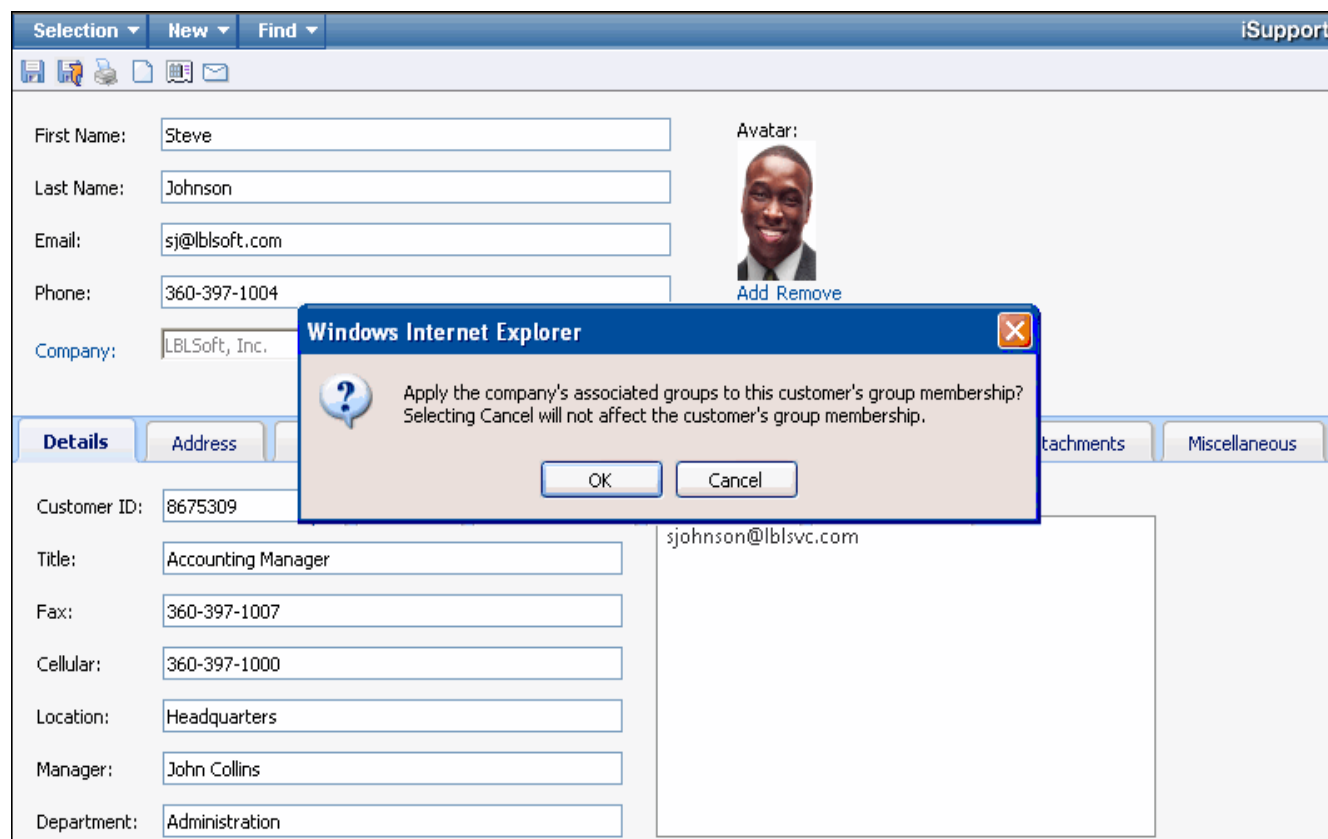
Field	Description
	<ul style="list-style-type: none"> LDAP. If there is an entry in the LDAP source that does not exist in Customer Profiles, the entry is created in Customer Profiles. <p>The Customers View All By Source view displays a list of all Customer Profile records sorted by the source from which they were created.</p>
Comments	Enter comments that will display in an uneditable dialog when the customer is selected. If a comment is entered for the customer's company as well, the company comment will appear before the customer's comment.

Saving a Customer Profile

To save a customer profile, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save  or Save and Close Window  icon.

If customer groups are associated with a selected company, the following prompt will appear when you save a new record in the Customer Profile screen:





The screenshot shows the iSupport application window with the 'Customer Profile' form. The form has tabs for 'Details', 'Address', 'Attachments', and 'Miscellaneous'. The 'Details' tab is active, showing fields for First Name (Steve), Last Name (Johnson), Email (sj@lblsoft.com), Phone (360-397-1004), and Company (LBLSoft, Inc.). Below these are fields for Customer ID (8675309), Title (Accounting Manager), Fax (360-397-1007), Cellular (360-397-1000), Location (Headquarters), Manager (John Collins), and Department (Administration). An 'Avatar' section shows a photo of a man with 'Add Remove' links. A 'Windows Internet Explorer' dialog box is overlaid on the form, asking: 'Apply the company's associated groups to this customer's group membership? Selecting Cancel will not affect the customer's group membership.' with 'OK' and 'Cancel' buttons.

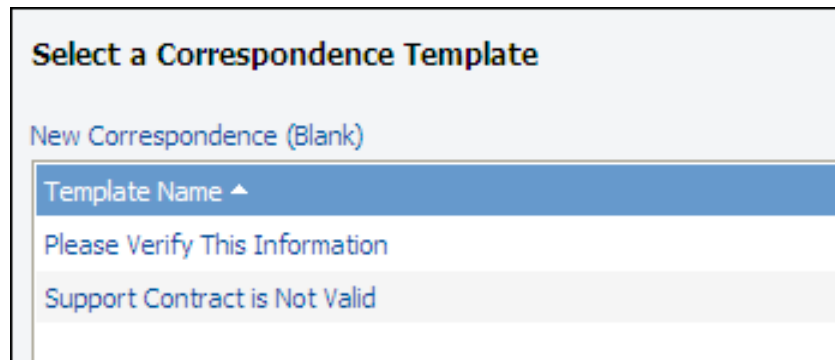
Click OK to assign the customer to the company's associated groups (those with asterisks).

Creating New Records From the Customer Profile Screen

Use the New menu to create a new Customer Profile record or correspondence document from the Customer Profile screen.

- To create a new Customer Profile record, select New | Customer or click the New Customer  icon. To create a new customer profile with the address, company, location, manager, groups, OTN, and department fields populated from the existing Customer Profile record, select New | Customer Similar Profile.
- To create and send an email to the customer, after saving the Customer Profile record, select New | Correspondence or click the New Correspondence  icon.

If creating correspondence, you can select from templates set up during configuration or create a new email by selecting New Correspondence (blank).



Correspondence templates may be configured to contain only read-only (greyed out) fields. Notifications have a limit of 2000 characters (including any custom text, added fields, etc.).

If creating a new correspondence document, the CC, BCC, Subject, and Attachment fields are blank. The Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop). If selecting a template, some or all of the fields may be populated.

In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. If using a correspondence template, a different email address may be included.


By default, the To field contains the email address set up for the customer in his/her Customer Profile record.

The screenshot shows the iSupport email composition interface. At the top, there are tabs for 'Selection' and 'Include'. The 'Basics' tab is active, displaying the following fields: 'From' (bw@lblsoft.com), 'To' (sj@lblsoft.com), 'Cc', 'Bcc', 'Subject' (Please Verify for Our Records), 'Date' (11/25/2009 Time: 8:27 PM), 'Priority' (Normal), and 'CC: Others To Notify' (unchecked). A 'Preview' button is located next to the 'Cc' field. Below the 'Basics' tab is the 'Body' tab, which contains a text editor. The text editor has a toolbar with various icons for text formatting (bold, italic, underline, link, unlink, list, indent, outdent, etc.) and a font face dropdown set to 'Tahoma'. The message body text is: 'Hello, We are in the process of verifying that our customer records are complete. Please review the following information and respond with corrections if applicable. <First Name> <Last Name> <Phone> <Department> <Company> <Location> <Manager> Regards, Barry White, Support Representative'. At the bottom of the window are 'Send' and 'Cancel' buttons.

You can choose to copy (CC) those in the selected customer's Others to Notify list. Note that the correspondence will also be sent to the Others to Notify list of companies in which the customer is a member.

If using a template, fields (for example, <First Name>) may be included as set up during configuration. These fields will be replaced with corresponding data from the Customer screen when the email is sent. You can insert additional fields using the Include menu. If data does not exist for a value, nothing will be inserted when the email is sent.

If configured in the Preferences screen, the text editor toolbar will appear when you place your cursor in the Body field; you can also display it by clicking the field label link to display a larger window. See ["Using the Text Editor Toolbar" on page 13](#) for more information. The icons in the toolbar will display tooltips with keyboard shortcuts.

You can use the Image Upload  icon to upload saved screenshots and other images up to 2 MB.

When you enter a URL or email address with a space after it, the entry turns into a hyperlink. By default the Tab key will move from field to field; you can enable the Tab key to insert spaces instead by setting an option in the Preferences screen (accessed via the Desktop).

Use the Preview link to view the email using values from the Customer Profile record.

Selection iSupport

Basics ?

From: Date: 11/25/2009 Time: 8:27 PM

To: Priority:

Cc: CC: Others To Notify ☐

Bcc:

Subject:

Body Attachments

Hello,

We are in the process of verifying that our customer records are complete. Please review the following information and respond with corrections if applicable.

Steve Johnson
360-397-1004
Administration
LBLSoft, Inc.
Headquarters
John Collins

Regards,
Barry White
Support Representative

When finished completing fields in the Correspondence dialog, click the Send button.

Viewing Items Associated with a Customer

Use the Find menu in the Customer Profile screen to display assets entered for a customer and correspondence sent to a customer. To display a list of assets owned by the customer, select Find | Assets for Customer.


View Assets		
Tag Number ^	Name	Type
203948	IBM Workstation	Desktop PC
C39839	Johnson Laptop	Computer
<input type="button" value="Close Window"/>		

- To display a list of all correspondence sent to the customer from the Customer Profile screen, select Find | Correspondence For Customer.

Correspondence Documents		
Date Time ^	Subject	Sender
8/19/2008 11:18:29 AM	More Information Required	bw@lblsoft.com
<div>Close Window</div>		


From the Correspondence Documents dialog, you can open a document by clicking on it.

Printing Customer Profiles

To print a customer profile, you can open the profile and select Print from the Selection menu or select the profile on the Desktop and then click the Print  icon.

Deleting Customer Profiles

If you have permission to delete a Customer Profile record, you can:

- Open the profile and select Delete from the Selection menu.
- Select the profile on the Desktop and then click the Delete  icon.

4 Working with Company Records

Overview

Use the Company screen to record company information that can be used in iSupport's Asset functionality.

The screenshot shows the iSupport application interface. At the top, there is a header bar with 'Selection', 'New', and 'Find' dropdown menus, and the 'iSupport' logo on the right. Below the header, there are icons for file operations. The main form area contains the following fields:

- Company Name: LBLSoft, Inc.
- Primary Customer: Steve Johnson

Below these fields is a tabbed interface with the following tabs: Details, Address, History, Groups, Others to Notify, Assets, Custom Fields, Attachments, and Miscellaneous. The 'Details' tab is currently selected, showing the following fields:

- Company Number: 6544
- Region: North
- Phone: 360-397-1000
- Industry: Technology
- Company Location: Northwest Division

After entering a company in this screen, it will be available for selection when a customer is added via the Customer Profile screen. You can send an email to all customers within a company.



If permissions are enabled during configuration, you may not be able to create a new Company record, or view, edit, or delete an existing Company record.

Groups

Customer groups are defined in the Configuration module, and enable you to Send correspondence for a selected group of customers via the Desktop.

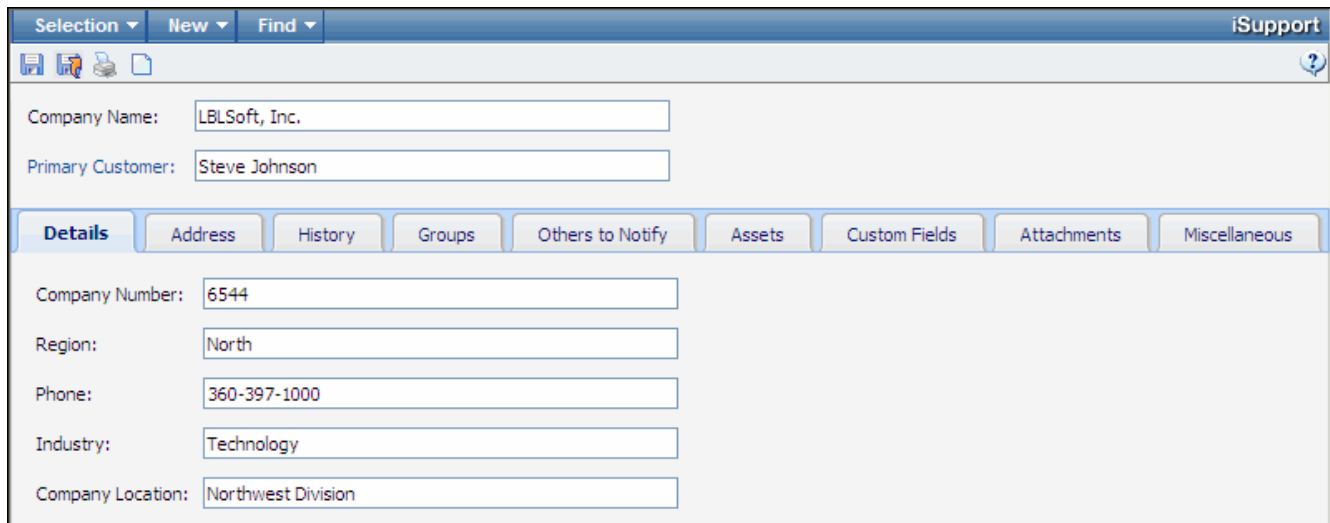
If you have the appropriate permissions set up in the Configuration module, you can add customers to groups via the Customer Profile screen. You can also use the Groups section in the Company screen to assign all of a company's current customers to a group. You can view customer group membership in the Customer Profile screen and on the Desktop.

Others to Notify

If enabled in configuration, you can set up an Others to Notify list for a company, to be used for sending correspondence notifications to those not directly involved in the process. An Others to Notify list can be set up for an individual customer or all customers in a company.

Entering Company Records

To access the Company screen, select Company on the Desktop action menu. Enter the company name and the primary customer who will be the primary contact for the company.



The screenshot shows the iSupport application window. At the top, there is a menu bar with 'Selection', 'New', and 'Find' dropdowns, and a 'iSupport' title bar. Below the menu bar is a toolbar with icons for file operations. The main form area has two input fields: 'Company Name' with the value 'LBLSoft, Inc.' and 'Primary Customer' with the value 'Steve Johnson'. Below these fields is a tabbed interface with tabs for 'Details', 'Address', 'History', 'Groups', 'Others to Notify', 'Assets', 'Custom Fields', 'Attachments', and 'Miscellaneous'. The 'Details' tab is currently selected. Under the 'Details' tab, there are five input fields: 'Company Number' with the value '6544', 'Region' with the value 'North', 'Phone' with the value '360-397-1000', 'Industry' with the value 'Technology', and 'Company Location' with the value 'Northwest Division'.

Entering Company Details

Use the Details tab to enter basic information about the company.

Field	Description
Company Number	Enter an identification number for the company.
Region	Enter the region for the company.
Phone	Enter the primary telephone number for the company.
Industry	Select the industry in which the company is involved.
Company Location	Enter the location of the company.

Entering Address Information

Use the Address tab to enter the company's street and mailing address information; it is used for reference purposes. If you have internet access, you can click the Open Map link to search Google Maps using the specified address, city, state, and ZIP/Postal code.

Details	Address	History	Groups	Others to Notify	Assets	Custom Fields	Attachments
Miscellaneous							
Street Address:		<input type="text" value="10000 NE 7th Avenue"/>					
		<input type="text" value="Ste 401"/>					
		<input type="text"/>					
City:	<input type="text" value="Vancouver"/>						
State:	<input type="text" value="WA"/>						
ZIP/Postal:	<input type="text" value="98685"/>						
Country:	<input type="text" value="USA"/>						
Open Map							
Mailing Address:		<input type="text" value="10010 NE 7th Avenue"/>					
		<input type="text"/>					
		<input type="text"/>					
City:	<input type="text" value="Vancouver"/>						
State:	<input type="text" value="WA"/>						
ZIP/Postal:	<input type="text" value="98685"/>						
Country:	<input type="text" value="USA"/>						
Open Map							

Viewing Audit History

After you save a Company record, an entry appears on the Audit History tab. This section includes a notation of every action performed on the record with the date, time, and author stamp.

Details	Address	History	Groups	Others to Notify	Assets	Custom Fields	Attachments
Miscellaneous							
01-Feb-2010 11:35:22 AM - Barry White							
- Changed Mailing Address 1 From: 10000 NE 7th Avenue To: 10010 NE 7th Avenue							
- Changed Mailing Address 2 From: Ste 401 To:							

Assigning to Customer Groups

Customer groups enable you to generate correspondence for a group of customers. If you have the appropriate permissions set up in the Configuration module, you can use the Groups tab to assign all of a company's current customers to a group. (Note that group assignment and removal from groups can be accomplished via the Customer Profile screen and Desktop.)

DetailsAddressHistory**Groups**Others to NotifyAssetsCustom Fields

AttachmentsMiscellaneous

Defined Groups



Administrators
Adobe Users
Customer Advisory Board

→
←
→
←

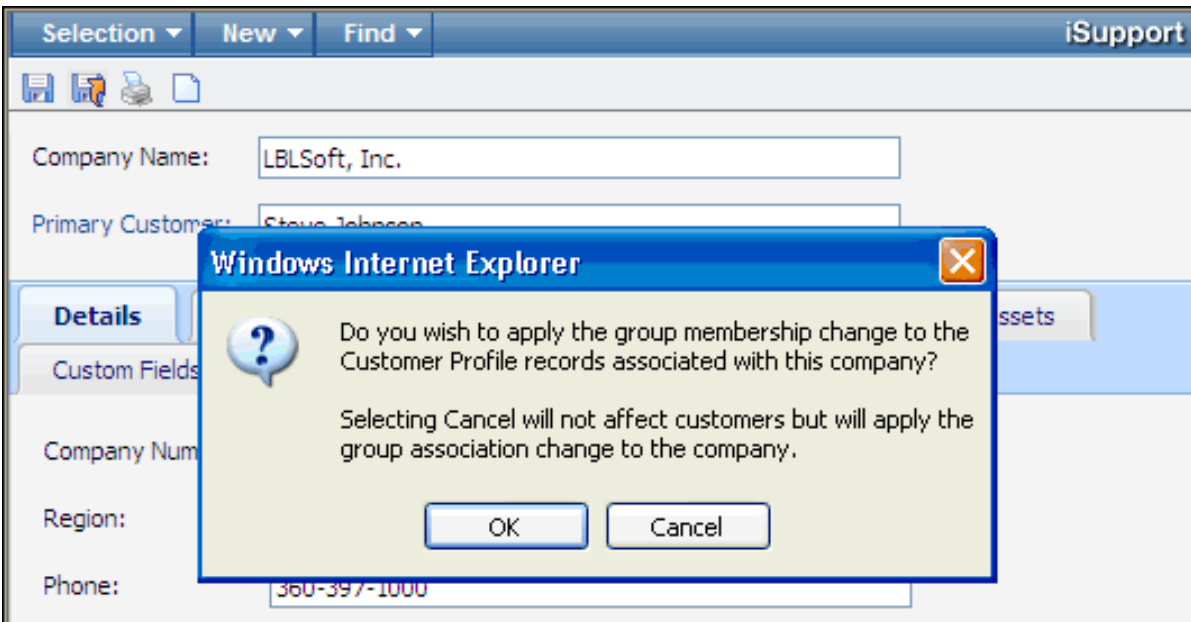
Associated Groups

Primary: Executive Mgmt Team
Platinum Support Members

Group association does not imply customer membership. A customer's group membership can be verified in the Customer Profile screen.

Field	Description
Defined Groups Associated Groups	<p>The Defined Groups field includes customer groups set up in the Configuration module. To assign the all of the company's current customers to the group, select the group and click the  icon.</p> <p>To remove a group from the Associated Groups field, select the group and click the  icon.</p>

The following prompt appears when you save the record:



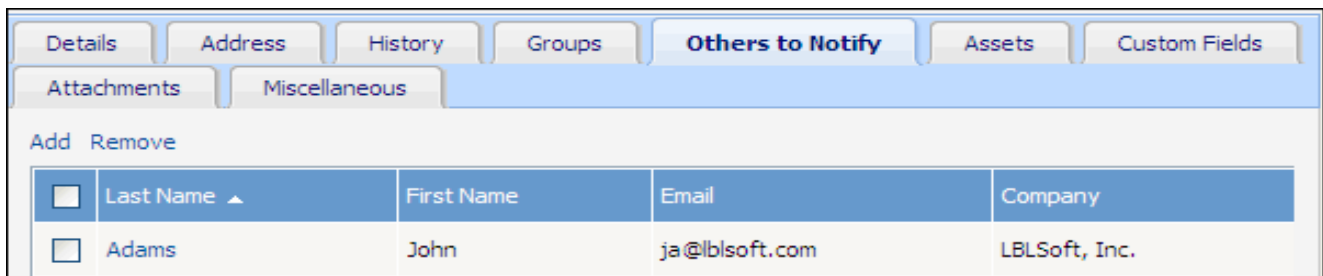
If you select OK at the prompt, the company's customers will be assigned to the group and the group will appear in the Associated Groups field in the Groups section in each customer's profile record.

If you select Cancel at this prompt, the group will still be included in the Associated Groups field for future customer assignment. See ["Assigning to Customer Groups" on page 65](#) for more information.

Specifying Others to Notify

If enabled in configuration, you can set up a list of customers to be sent event notifications and other correspondence. An Others to Notify list can be set up for an individual customer or all customers in a company.

To add to the Others to Notify list for all customers assigned to the company, click the Add link. Use the Remove link to delete anyone from this list.



When you create a correspondence document from the Customer Profile screen or select a customer on the Desktop, you can choose to copy (CC) those in the selected customer's Others to Notify list. Note that the correspondence will also be sent to the Others to Notify list of the company assigned to the customer.

Associating Assets

You can associate assets with Customer and Company records; click the Add link to select the asset(s) to associate with the company

The screenshot shows a software interface with a top navigation bar containing tabs: Details, Address, History, Groups, Others to Notify, Assets (selected), and Custom Fields. Below this is a sub-navigation bar with Attachments and Miscellaneous. The main content area has a header with 'Add' and 'Remove' links. Below the header is a table with the following data:

<input type="checkbox"/>	Name ▲	Type	Tag Number	Serial Number
<input type="checkbox"/>	Accounting Printer	Printer	C101	656-8987654-54545
<input type="checkbox"/>	Accounting Server	Server	15346	213412-23412-2412341

Completing Custom Fields

If custom fields have been set up for the Company screen, fields will appear on the Custom Fields tab. You may be required to enter information in these fields.

The screenshot shows a software interface with a top navigation bar containing tabs: Details, Address, History, Groups, Others to Notify, Assets, Custom Fields (selected), and Attachments. Below this is a sub-navigation bar with Miscellaneous. The main content area has a label 'IMPORTANT COMMENTS:' followed by a text input field.

Attaching Files

To attach a file to the Company record, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.

The screenshot shows a software interface with a top navigation bar containing tabs: Details, Address, History, Groups, Others to Notify, Assets, Custom Fields, and Attachments (selected). Below this is a sub-navigation bar with Miscellaneous. The main content area has a label 'Attachment:' followed by a text input field, a 'Browse...' button, and an 'Add' button. Below this is a table with the following data:

File Name	Size	Type	
CompanyContract.pdf	3840.498K	application/pdf	<input type="button" value="Delete"/>



Completing the Miscellaneous Tab

Use the Miscellaneous tab to enter comments regarding the company.

Field	Description
Comments	Enter comments regarding the company. These comments will display in an uneditable dialog when a customer of the company is selected. The comments will appear before any customer comments.


Saving a Company Record

To save a Company record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save  or Save and Close Window  icon.

Creating New Records From the Company Screen

Use the New menu to create a new Company record or customer profile from the Company screen.

- To create a new Company record, select New | Company or click the New Company  icon.
- To create a new Customer Profile record, select New | Customer Profile.

Viewing Items Associated with a Company

Use the Find menu in the Company screen to display assets entered for customers of the company, correspondence sent to customers in the company, and a list of customers in the company.

- To display a list of assets associated with customers of the company, select Find | Assets for Company.

View Assets		
Tag Number ^	Name	Type
203948	IBM Workstation	Desktop PC
C39839	Johnson Laptop	Computer
Close Window		

- To display a list of all correspondence sent to customers of the company (via the Customer Profile screen), select Find | Correspondence For Company.


Correspondence Documents		
Date Time ^	Subject	Sender
8/19/2008 11:18:29 AM	More Information Required	bw@lblsoft.com
Close Window		

From the Correspondence Documents dialog, you can open a document by clicking on it.

- To display a list of all customers associated with the company (via the Customer Profile screen), select Find | Customers for Company.


Customers				
First ^	Last	Phone	Email	Location
Barry	White	360-397-1088	bw@lblsoft.com	Headquarters
Donna	Erickson	360-397-1099	de@lblsoft.com	Northwest Division
Gregg	Williams	360-397-1000	gw@lblsoft.com	Northwest Division
Close Window				

Printing Company Records

To print a company record, you can open the record and select Print from the Selection menu or select the record on the Desktop and then click the Print  icon.

Deleting Company Records

To delete a Company record, you can:

- Open the record and select Delete from the Selection menu.
- Select the record on the Desktop and then click the Delete  icon.

5 Working with Assets

Overview

Use the Asset screen to record information about any type of item. This information can be associated with a customer. The Asset entry screen allows you to record identification numbers and purchase, warranty, and maintenance information if applicable.

The screenshot displays the iSupport Asset entry interface. At the top, there are 'Selection' and 'New' dropdown menus. Below them are icons for file operations. The main form has fields for 'Name' (BW Laptop), 'Type' (IBM Thinkpad), and 'Source' (Direct Entry). Below these are tabs for 'Details', 'Owners', 'Custom Fields', 'Groups', 'Attachments', and 'Dynamic Asset Scans'. The 'Details' tab is active, showing fields for 'Model' (Thinkpad), 'Manufacturer' (IBM), 'Tag Number' (C8484), 'Serial Number' (10293-20394-2039), 'Location' (Accounting Department), 'Purchase Date' (10/1/2009), 'Maintenance Expiration Date' (1/22/2011), and 'Warranty Expiration Date' (1/12/2011). There is also a 'Comments' section with a text area containing 'Replaced motherboard on 10/10/2009'.

Before you can enter an asset record, you'll need to select an asset type. Asset types enable you to track information on similar assets (for example, printers, laptops, furniture). Custom fields (specific to your company) and fields such as Owner, Tag Number, and Location are associated with asset types. These fields will appear when an asset type is selected in the Asset screen.

Asset groups enable you to associate assets for viewing and reporting. For example, you can create a group called Accounting Assets for assets such as computers and printers in the Accounting department.

Asset Scans

Asset scans collect hardware, software, and service details automatically on a computer (Windows 98 and above or any other WMI-compliant machine; WMI must be installed and active) and on non-Windows devices on your local subnet. There are two types of scans in iSupport Asset:

- You can perform a **dynamic asset scan** from the Asset screen or Desktop.
- **Inventory asset scans** can be scheduled and run automatically according to an Inventory Scan Definition, which defines the hosts (remote machines) to be scanned during a specified start time and duration. Inventory scans include a more comprehensive set of data than dynamic scans.

To perform the scan, you will need to enter the IP address or NetBIOS name of the machine to be scanned. The login used for accessing the machine will be validated by the WMI process of the target machine in order to return the requested data. Traditionally, the login must be a member of the Administrators group of the machine to be scanned, but machine permissions may be modified to a different structure. A default login may be set up during iSupport Asset configuration and accessed automatically by iSupport Asset.

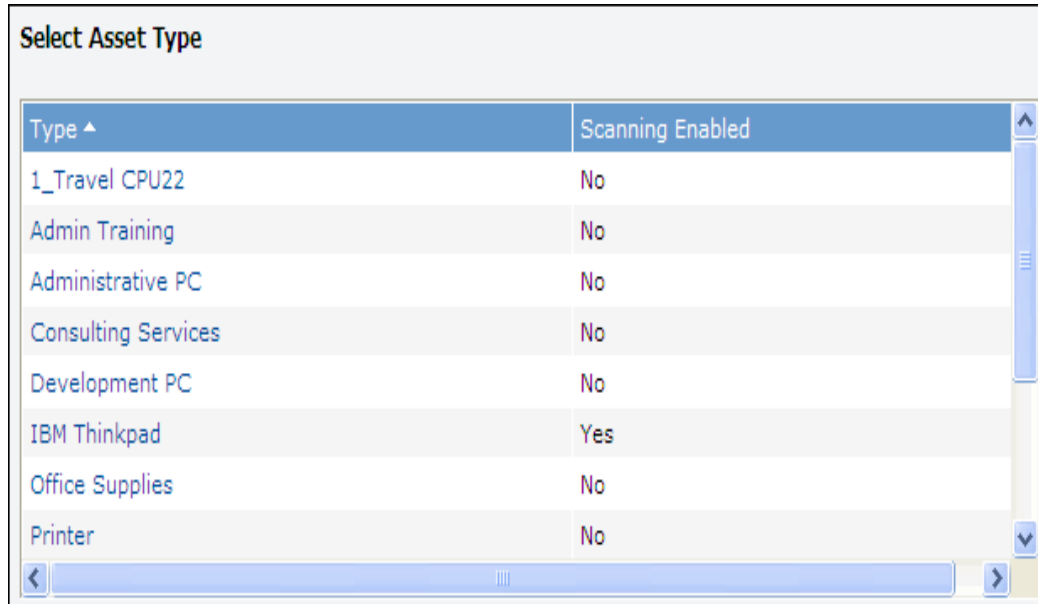
When a dynamic scan is initiated, the support representative can specify the types of data to include in the scan.

Selection ▾	New ▾	iSupport
Summary	Title:	Baseline Workstation Scan
Computer System	Scan Date:	11/25/2009 11:22:55 PM
Operating System		
Processes	COMPUTER SYSTEM	
	Description:	AT/AT COMPATIBLE

Entering an Asset Record

Use the Asset entry screen to create Asset records for a specific item with identification information.

To access the Asset entry screen, select Create | Asset on the Desktop action menu. The Select Asset Type dialog appears; select the applicable asset type.



The image shows a 'Select Asset Type' dialog box. It contains a table with two columns: 'Type' and 'Scanning Enabled'. The table lists several asset types, with 'IBM Thinkpad' being the only one with 'Scanning Enabled' set to 'Yes'. The dialog has a scroll bar on the right and a search bar at the bottom.

Type ▲	Scanning Enabled
1_Travel CPU22	No
Admin Training	No
Administrative PC	No
Consulting Services	No
Development PC	No
IBM Thinkpad	Yes
Office Supplies	No
Printer	No

Entering Asset Details

Use the fields on the Details tab to enter general information about the asset. The fields that appear depend on the configuration of the selected asset type.

The screenshot shows the iSupport application interface. At the top, there's a header bar with 'Selection' and 'New' dropdowns, and the 'iSupport' logo. Below the header, there's a toolbar with icons for file operations. The main form area has a top section with 'Name: BW Laptop', 'Type: IBM Thinkpad', and 'Source: Direct Entry'. Below this is a tabbed interface with 'Details' selected, and other tabs for 'Owners', 'Custom Fields', 'Groups', 'Attachments', and 'Dynamic Asset Scans'. Under the 'Details' tab, there's a sub-tab 'Inventory Asset Scans'. The form fields include: 'Model: Thinkpad', 'Manufacturer: IBM', 'Tag Number: C8484', 'Serial Number: 10293-20394-2039', 'Location: Accounting Department', 'Purchase Date: 10/1/2009', 'Maintenance Expiration Date: 1/22/2011', and 'Warranty Expiration Date: 1/12/2011'. Each date field has a small calendar icon. At the bottom, there's a 'Comments:' section with a text area containing 'Replaced motherboard on 10/10/2009'.

Field	Description
Name	Enter the name of the asset.
Type	The selected asset type appears; click this link to change it.
Tag Number Serial Number Location Model Purchase Date Manufacturer Comments	One or more of these fields may appear depending on the selected asset type. These fields (except Comments) will appear when the asset is selected.
Maintenance Expiration Date	This field will appear if maintenance tracking is enabled for the specified asset type. Enter the date on which the maintenance contract ends. Expiration notifications may be configured to be sent before this date.
Warranty Expiration Date	This field will appear if warranty tracking is enabled for the specified asset type. Enter the date on which the warranty ends. Expiration notifications may be configured to be sent before this date.

Viewing Audit History

After you save an asset record, an entry appears on the History tab. This tab includes a notation of every action performed on the asset record with the date, time, and author stamp.

The screenshot shows the 'History' tab selected in a software interface. The tab bar includes 'Details', 'History', 'Owners', 'Custom Fields', 'Groups', 'Attachments', and 'Dynamic Asset Scans'. Below the tabs, there is a sub-tab 'Inventory Asset Scans'. The main content area displays a log of actions performed on an asset, starting with a timestamp '01-Feb-2010 11:54:26 AM' and the user 'Barry White'. The log lists several actions: 'New asset record created.', 'Set Name To: BW Laptop', 'Set Type To: IBM Thinkpad', 'Set Model To: Thinkpad', 'Set Manufacturer To: IBM', 'Set Tag Number To: C8484', 'Set Serial Number To: 10293-20394-2039', 'Set Location To: Accounting Department', 'Set Purchase Date To: 10/1/2009', 'Set Maintenance Expiration Date To: 1/22/2011', 'Set Warranty Expiration Date To: 1/12/2011', 'Set Comments To: Replaced motherboard on 10/10/2009', and 'Set Source To: Direct Entry'.

Timestamp	Author	Action
01-Feb-2010 11:54:26 AM	Barry White	New asset record created.
		- Set Name To: BW Laptop
		- Set Type To: IBM Thinkpad
		- Set Model To: Thinkpad
		- Set Manufacturer To: IBM
		- Set Tag Number To: C8484
		- Set Serial Number To: 10293-20394-2039
		- Set Location To: Accounting Department
		- Set Purchase Date To: 10/1/2009
		- Set Maintenance Expiration Date To: 1/22/2011
		- Set Warranty Expiration Date To: 1/12/2011
		- Set Comments To: Replaced motherboard on 10/10/2009
		- Set Source To: Direct Entry

Selecting Owners

If the Owners tab is configured to display for the asset type, click the Add link to assign one or more owners to the asset. You can also click the Company link to associate a company with the asset; this enables targeted customer and asset lookups. (Note that only one company can be associated with an asset.) A prompt will appear for adding the company's customers added to the Owners field.

The screenshot shows the 'Owners' tab selected in the same software interface. The tab bar includes 'Details', 'History', 'Owners', 'Custom Fields', 'Groups', and 'Attachments'. Below the tabs, there is a sub-tab 'Inventory Asset Scans'. The main content area shows an 'Add Remove' link and a 'Company: LBLSoft, Inc.' label. Below this is a table with columns: 'Last Name', 'First Name', 'Email', and 'Company'. The table contains one entry for 'Jones, Bob' with email 'bj@lblsoft.com' and company 'LBLSoft, Inc.'.

	Last Name ▲	First Name	Email	Company
<input type="checkbox"/>	Jones	Bob	bj@lblsoft.com	LBLSoft, Inc.

Completing Custom Fields

If custom fields have been set up for the specified asset type and/or for the Asset screen, the fields will appear on the Custom Fields tab. You may be required to enter information in these fields.

Assigning to Asset Groups

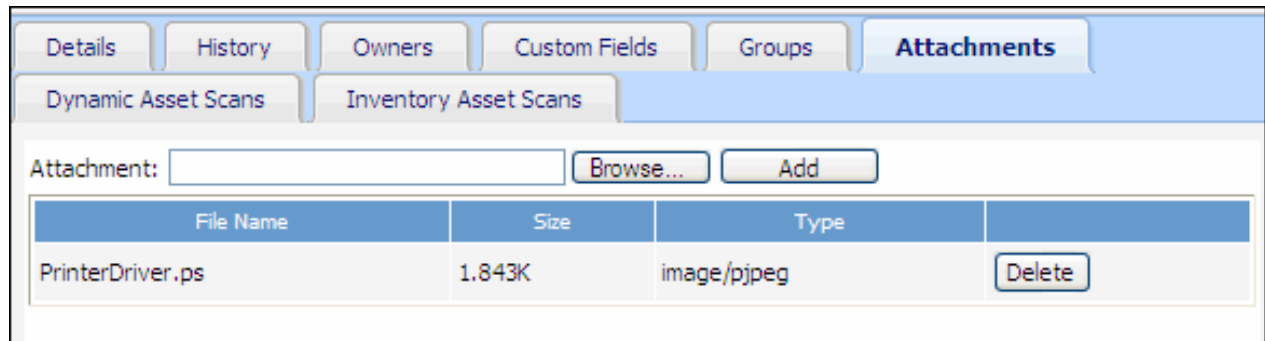
Asset groups enable you to associate assets for viewing and reporting. If you have Asset | Editor | Edit permission, you can add an asset to a group or remove an asset from a group. This can also be accomplished for selected assets on the Desktop.

An asset group may be configured with group access restrictions; this allows only those in the related support representative group to edit Asset records in the asset group (or any other asset record not included in an asset group). If configured, a support representative can select only his/her groups to add to an asset. Other unrelated groups could be present on an existing asset; these unrelated groups could be removed but not added.

Field	Description
No Membership Membership	<p>The No Membership field includes asset groups set up in the Configuration module.</p> <ul style="list-style-type: none">■ To assign the asset to a group, select the group in the No Membership field and click the → icon.■ To remove the asset from a group, select the group in the Membership field and click the ← icon.

Attaching Files

To attach a file to the asset record, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.



The screenshot shows a software interface with a top navigation bar containing tabs: Details, History, Owners, Custom Fields, Groups, and Attachments. The Attachments tab is selected. Below the navigation bar, there are two sub-tabs: Dynamic Asset Scans and Inventory Asset Scans. The main area of the Attachments tab contains an 'Attachment:' label followed by a text input field, a 'Browse...' button, and an 'Add' button. Below this is a table with the following structure:

File Name	Size	Type	
PrinterDriver.ps	1.843K	image/jpeg	Delete

Performing a Dynamic Scan

From the Asset entry screen, you can scan non-Windows devices on your local subnet and computers with Windows 98 and above or any other WMI (Windows Management Instrumentation)-compliant machine over the network. This allows you to collect hardware, software, and service details automatically. The login used to run the scan must be in the Administrators group on the machine to be scanned. If you do not have this login, it can be set during iSupport Asset configuration and accessed automatically by iSupport Asset.

Dynamic asset scans can be performed from the Desktop or Asset screen. To perform a scan in the Asset screen, you can select New | Scan, click the New Scan  icon, or click the New Scan link.

From the Desktop, click Dynamic Asset Scan on the Create menu. The Dynamic Asset Scan dialog appears:

Dynamic Asset Scan Uncheck All Check All

Computer Systems ☐ ☒

- ☒ Computer System
- ☒ Services
- ☒ Running Processes
- ☒ Operating System
- ☒ Software Titles
- ☒ Hot Fixes

System Ports ☐ ☒

- ☒ Modems
- ☒ Parallel Ports
- ☒ Port Connectors
- ☒ Network Adapters
- ☒ Serial Ports
- ☒ Logical Drives

Peripherals ☐ ☒

- ☒ Infrared Devices
- ☒ Pointing Devices
- ☒ Keyboards
- ☒ Desktop Monitors

Hardware Controllers ☐ ☒

- ☒ IDE Controllers
- ☒ Video Controllers
- ☒ Floppy Controllers
- ☒ PCMCIA Controllers

System Hardware ☐ ☒

- ☒ Processors
- ☒ BIOS
- ☒ Physical Memory
- ☒ System Slots

Drives ☐ ☒

- ☒ Disk Drives
- ☒ Floppy Drives
- ☒ CD-ROM Drives

Host Address:

User Name:

Password:

Community:

Use Default Credentials ☒ Yes ☐ No

Scan Close Window

Field	Description
Computer Systems System Ports Peripherals Hardware Controllers System Hardware Drives	Select the types of data to include in the scan. To select all checkboxes in a section, use the <input checked="" type="checkbox"/> icon; to clear the checkboxes in a section, use the <input type="checkbox"/> icon. Use the Uncheck All and Check All links for all checkboxes.
Host Address	Enter the identifier of the system to be scanned (IP address, machine name to scan in the current domain, or domain\machine name).

Field	Description
User Name Password	<p>These fields will be enabled if:</p> <ul style="list-style-type: none"> ■ A default user name and password have not been entered for the selected asset type during configuration. ■ No is selected in the Use Default Credentials field. <p>Enter a user name and password with rights for accessing the machine to be scanned.</p>
Community	<p>If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device). Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".</p>
Use Default Credentials	<p>If the user name and password with administrative rights was set up for the asset type during configuration, select Yes to use that login (instead of completing the User Name and Password fields in this dialog) to perform the scan.</p> <p>Select No to enable the User Name and Password fields and enter the login for accessing the machine to be scanned.</p>

When finished, click the Scan button.

After the scan has finished, the Scan Results dialog appears as shown in the example below. Use the links on the left to quickly move to a certain portion of the scan. Choose Save on the Selection menu to save the scan and enter a title.

Selection ▾	New ▾	iSupport	
Summary	Title:	Baseline Workstation Scan	
Computer System	Scan Date:	11/25/2009 11:22:55 PM	
Operating System			
Processes	COMPUTER SYSTEM		
	Description:	AT/AT COMPATIBLE	

Choose Attach to Asset on the scan's Selection menu to attach the scan to the current Asset record. The scan appears in the Dynamic Scans section in the Asset screen as shown in the example below. You can click on the date/time link to view the scan. To detach the scan from the asset record, click

on the date/time link to open the scan and choose Detach From Asset on the scan's Selection menu.

Details	History	Owners	Custom Fields	Groups	Attachments
Dynamic Asset Scans					
Inventory Asset Scans					
New Scan Delete					
<input type="checkbox"/>	Scan Date ▼	Title	Machine Name	Scanned By	
<input type="checkbox"/>	10/27/2009 10:53:03 AM	Baseline Workstation Scan	DOC	Barry White	

Associating Inventory Scans

Asset scans can be scheduled and run automatically according to an Inventory Scan Definition set up during configuration. The Inventory Scan Definition defines the system(s) to be scanned during a specified start time and duration.

To select an existing inventory scan to be associated with the asset record, click the Inventory Scan Source link on the Inventory Scans tab. The Select Inventory Scan Source dialog appears with a list of all of the systems on which an inventory scan has been performed. The inventory scans that have run against the selected machine (up to 15 of the most recent scans) will appear on the Inventory Scans tab as shown in the example below. You can click on the date/time link to view a scan.

Details	History	Owners	Custom Fields	Groups	Attachments
Dynamic Asset Scans					
Inventory Asset Scans					
Inventory Scan Source: DOC					
Created ▼					
10/27/2009 11:22:39 AM					

Comparing Asset Scans

If you have sufficient permissions, you can select two scans (dynamic or inventory) and then generate and save a side-by-side comparison. From the Desktop, select Create | Asset Scan Comparison. From a scan, select New | Scan Comparison. The following dialog appears; use the

drop-down list to display either all dynamic scans or all inventory scans for the first scan in the comparison. You can use the search dropdown fields for finding the scans to compare.

Select First Scan for Comparison

All Dynamic Scans

Title
Contains
*
Search
Show All

☐ Search within results

Scan Date	Title
8/5/2009 1:32:33 PM	Monthly Workstation Scan
8/5/2009 1:27:36 PM	Baseline Scan

The following dialog appears; use the drop-down list to display either all dynamic scans or all inventory scans for the second scan in the comparison.

Select Second Scan for Comparison

All Dynamic Scans
All Dynamic Scans
All Inventory Scans

Contains
*
Search
Show All

☐ Search within results



Scan Date	Title
8/5/2009 1:32:33 PM	Monthly Workstation Scan
8/5/2009 1:27:36 PM	Baseline Scan

The scan comparison appears. Choose Save on the Selection menu to enter a title and save the scan comparison.


Selection	New Comparison		
Summary	Scan Comparison Title:	Untitled	
Computer System	Date Created:	3/25/2008 12:29:38 PM	
Operating System			
Processes	Scan Title:	Initial Setup Scan	Second Scan
Services	Scan Date:	1/23/2008 2:16:49 PM	1/23/2008 2:27:12 PM
Logical Drives			
Software Titles	COMPUTER SYSTEM		
Hot Fixes	Domain:	QA.com	QA.com
Network Adapters	Domain Role:	Member Workstation	Member Server
Parallel Ports	Name:		
Serial Ports	Model:	8307313	830731U
	Processors:	2	1

Saving an Asset Record

To save an asset record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save  or Save and Close Window  icon.

Creating New Records

Click the  icon or select New | Asset to create a new Asset record.

Using the Multiple Asset Creation Wizard

The Asset Creation Wizard enables you to automatically create more than one asset record. You can enter data to populate asset fields in all records created and display prompts for entering data unique to a record. You can save your settings in a profile for use later.

The Asset Wizard option appears on the Create menu on the Desktop if the Use Multiple Asset Wizard permission has been assigned to you in your Support Representative Profile record. Select New in the first screen to start the process.

Asset Information

Asset Type and Quantity
 Asset Type: Administrative PC Asset Quantity: 5

Asset Fields

	Field	Prompt?
*Asset Name:	Laptop	<input type="radio"/> Yes <input checked="" type="radio"/> No
Owner	Steve Johnson	<input type="radio"/> Yes <input checked="" type="radio"/> No
Model:	Thinkpad	<input type="radio"/> Yes <input checked="" type="radio"/> No
Manufacturer:	IBM	<input type="radio"/> Yes <input checked="" type="radio"/> No
Tag Number:	C10-	<input checked="" type="radio"/> Yes <input type="radio"/> No
Serial Number:	94818-86182	<input checked="" type="radio"/> Yes <input type="radio"/> No
Location:	Headquarters	<input type="radio"/> Yes <input checked="" type="radio"/> No
Purchase Date:	10/18/09 21	<input type="radio"/> Yes <input checked="" type="radio"/> No
Comments:	Shipment - Computers Inc	<input type="radio"/> Yes <input checked="" type="radio"/> No

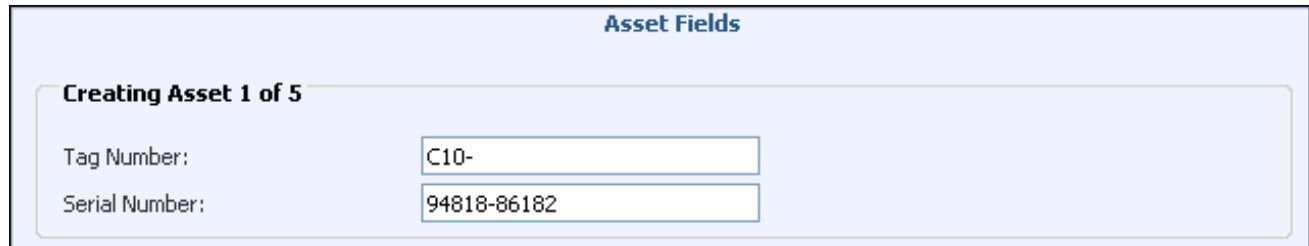
Custom Fields
 Used For: Working at home

Enter the asset type, quantity, and data to populate asset fields in all records created. Select Yes in the Prompt column to display prompts for entering data unique to a record. Click Next when finished.

Field	Description
Asset Type	Select the asset type to assign to all of the Asset records created. Asset types are set in the Configuration module.
Asset Quantity	Enter the number of Asset records to be created.
Field column	Enter the data to populate the corresponding fields in all of the Asset records created. With the exception of the required fields (marked with an asterisk), you can leave a field blank to leave the corresponding field blank. The Asset Name field is required.

Field	Description
Prompt column	Select Yes to display the field on a screen for each record created so you can enter a value unique to each record.
Custom Fields	Enter the data to populate the corresponding custom fields on all records created. Custom fields are set in the Configuration module.

If you selected Yes for a field in the Prompt column, a screen appears for each record to be created. Enter the data unique to each record and click Next.



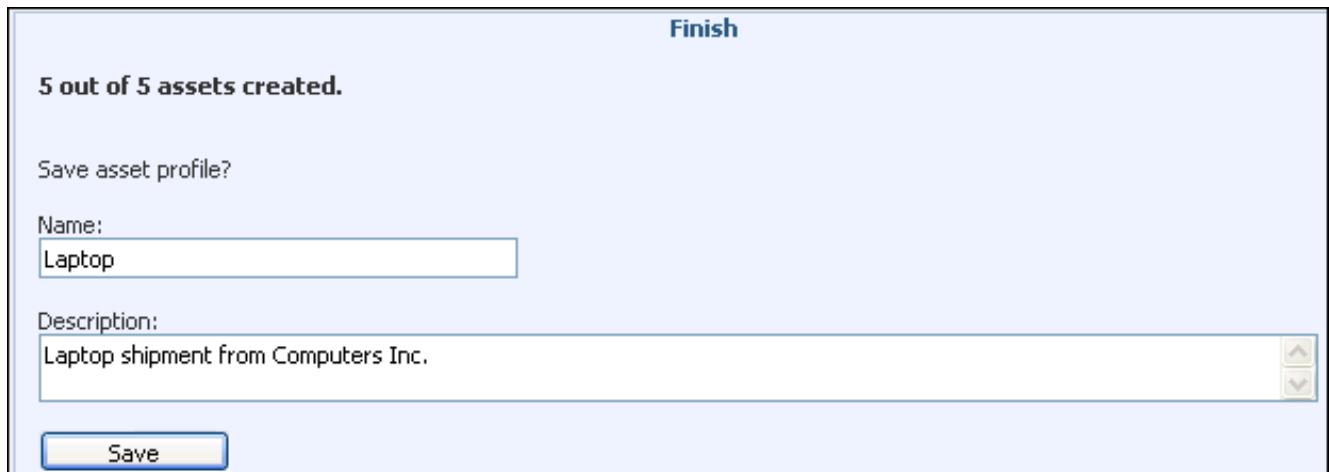
Asset Fields

Creating Asset 1 of 5

Tag Number:

Serial Number:

After the Asset records have been created, you can enter a name and description and save the profile. Click Finish to exit without saving.



Finish


5 out of 5 assets created.

Save asset profile?

Name:

Description:

Printing an Asset Record

To print an asset record, select Print from the Selection menu or click the  icon. You can also print from the Desktop.

Deleting an Asset Record

To delete an asset record, select Delete from the Selection menu. You can delete multiple asset records via the Desktop.

6 Tracking Software Licenses

Overview

iSupport Asset’s License Management functionality enables you to track instances of one or more software titles against a specified condition and quantity. You’ll set up a profile that includes a condition (actual quantity is not or is greater than or less than a specified quantity), the software titles, and notification to be sent if the condition is met.

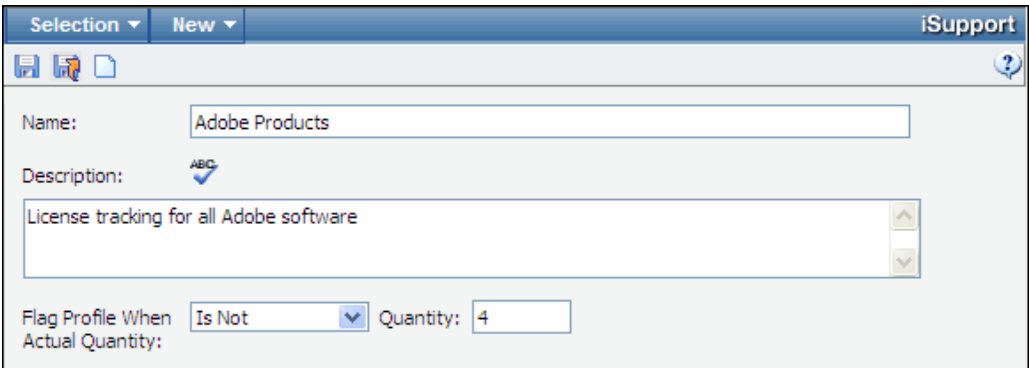
The License Management agent scans all inventory scans and searches for instances of the software titles specified in Software License Profile records. It compares the actual quantities found against the conditions, flags the profiles that meet the conditions, and updates the profiles with the actual quantities. Notifications are sent if configured. The *iSupport Asset Administrator’s Guide* contains more information about the License Management agent.

Creating a License Profile

To create a license profile, select License Management | Create Software License Profile on the Desktop action menu.

Entering Details

Use the upper portion of the screen to enter a name and description for the profile and specify the condition for flagging software licenses.

A screenshot of a software window titled "iSupport" with a menu bar containing "Selection" and "New". The window has a toolbar with icons for file operations. The main area contains a "Name:" field with the text "Adobe Products", a "Description:" field with a blue checkmark icon and the text "License tracking for all Adobe software", and a "Flag Profile When Actual Quantity:" section with a dropdown menu set to "Is Not" and a "Quantity:" field set to "4".

Field	Description
Name	Enter a name for the profile.

Field	Description
Description	Enter a description of the profile. This description will appear in License Management views on the Desktop.
Flag Profile When Actual Quantity	Select: <ul style="list-style-type: none"> ■ Is Not to flag the profile if the actual number of software application instances is not equal to the number specified in the Quantity field. ■ Is Greater Than to flag the profile if the actual number of software application instances is greater the number specified in the Quantity field. ■ Is Less Than to flag the profile if the actual number of software application instances is less than the number specified in the Quantity field.
Quantity	Enter the total number of software application instances to compare against the actual number of software application instances detected.

The actual quantity appears below the condition when the profile is saved; it is updated every time the License Management agent runs and the profile is saved.

The screenshot shows the 'iSupport' application window for creating a new software profile. The 'Name' field is filled with 'Adobe Products'. The 'Description' field contains 'License tracking for all Adobe software'. Under the 'Flag Profile When Actual Quantity' section, the condition is set to 'Is Not' and the 'Quantity' is set to '2'. The bottom status bar indicates the 'Actual Quantity' is '2 as of 11/17/2009 2:34:18 PM'.

Adding Software Titles

You can add software titles by entering the title information manually or by selecting titles detected from a compilation of all saved inventory scans. Enter the title information manually by selecting the New Software Title radio button as shown below. You can enter an asterisk (*) as a

wildcard in the Publisher or Version field to flag all instances of the publisher or version (respectively) for the title; ensure that it is the only entry in the field.

The screenshot shows a form titled 'Software Titles' with three tabs: 'Software Titles', 'Profile Notification', and 'Comments'. The 'Software Titles' tab is active. Below the tabs are two radio buttons: 'Inventory Scan Title' (unselected) and 'New Software Title' (selected). Below the radio buttons are three text input fields: 'Title' with the value 'Adobe Acrobat 3D', 'Publisher' with the value 'Adobe Systems', and 'Version' with the value '*'. At the bottom of the form, there is a note: 'For a wildcard match on Publisher or Version, use an asterisk as the only entry in the field.'

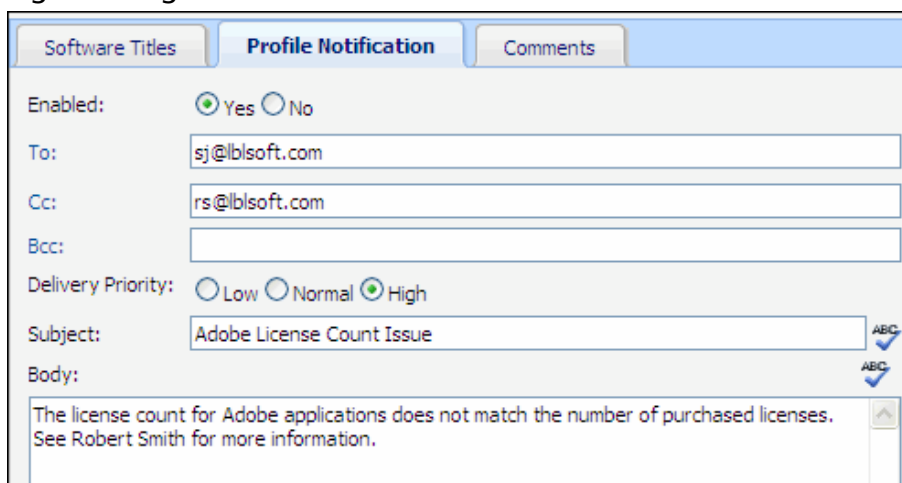
Use the Inventory Scan Title radio button to display the software titles detected from all saved inventory scans. Select the titles to be included in the search and click Add.

The screenshot shows the same 'Software Titles' form, but now the 'Inventory Scan Title' radio button is selected. Below the radio buttons, there is a search interface with a dropdown menu set to 'Title', a dropdown menu set to 'Contains', and a text input field containing '*'. To the right of these are 'Search' and 'Show All' buttons. Below the search interface is a table with 12 rows. The first row is a header with columns: 'Title', 'Publisher', and 'Version'. The subsequent rows are data rows. The first data row is 'AddressBook'. The second data row is 'Adobe Flash Player ActiveX' with publisher 'Adobe Systems Incorporated' and version '9.0.45.0'. The third data row is 'Adobe Reader 8.1.1' with publisher 'Adobe Systems Incorporated' and version '8.1.1'. Each row has a checkbox in the first column. The checkbox for 'Adobe Flash Player ActiveX' is checked and highlighted with a dashed border.

	Title	Publisher	Version
<input type="checkbox"/>	AddressBook		
<input checked="" type="checkbox"/>	Adobe Flash Player ActiveX	Adobe Systems Incorporated	9.0.45.0
<input type="checkbox"/>	Adobe Reader 8.1.1	Adobe Systems Incorporated	8.1.1

Setting Up the Flagged Profile Notification

Complete the Flagged Profile Notification tab to be sent when a profile is flagged because the condition specified in the Details section is met. Notifications are sent according to the schedule of the License Management agent.



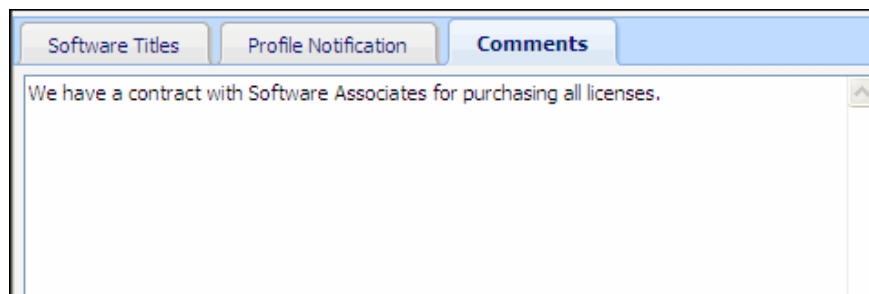
The screenshot shows the 'Profile Notification' tab of a software management interface. It contains the following fields and options:

- Enabled:** Radio buttons for 'Yes' (selected) and 'No'.
- To:** Text field containing 'sj@lblsoft.com'.
- Cc:** Text field containing 'rs@lblsoft.com'.
- Bcc:** Empty text field.
- Delivery Priority:** Radio buttons for 'Low', 'Normal', and 'High' (selected).
- Subject:** Text field containing 'Adobe License Count Issue'.
- Body:** Text area containing the message: 'The license count for Adobe applications does not match the number of purchased licenses. See Robert Smith for more information.'

There are 'ABC' icons with checkmarks next to the Subject and Body fields, and a scroll bar on the right side of the Body text area.

Entering Comments



Use the Comments tab to enter any notes regarding the profile.



The screenshot shows the 'Comments' tab of the same software management interface. It features a large text area with the following comment entered: 'We have a contract with Software Associates for purchasing all licenses.' A scroll bar is visible on the right side of the text area.

Saving a License Profile

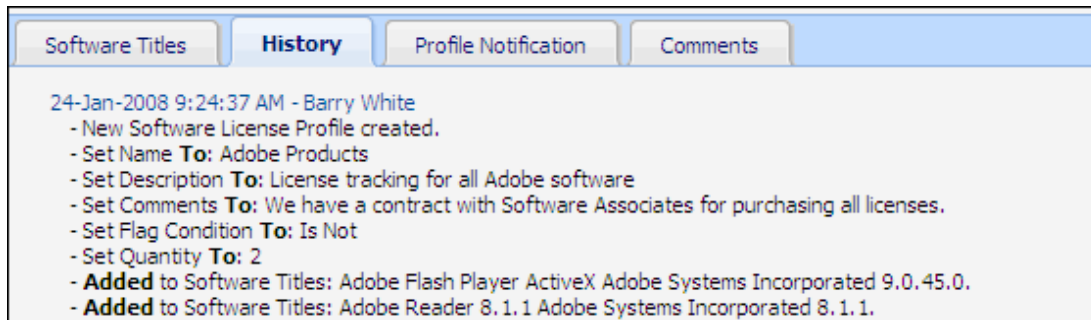
To save a License Profile record, you can:

- Select Save or Save and Close Window from the Selection menu.
- Click the Save  or Save and Close Window  icon.

The actual quantity appears in the Details section when the profile is saved; it is updated every time the License Management agent runs and the profile is saved.

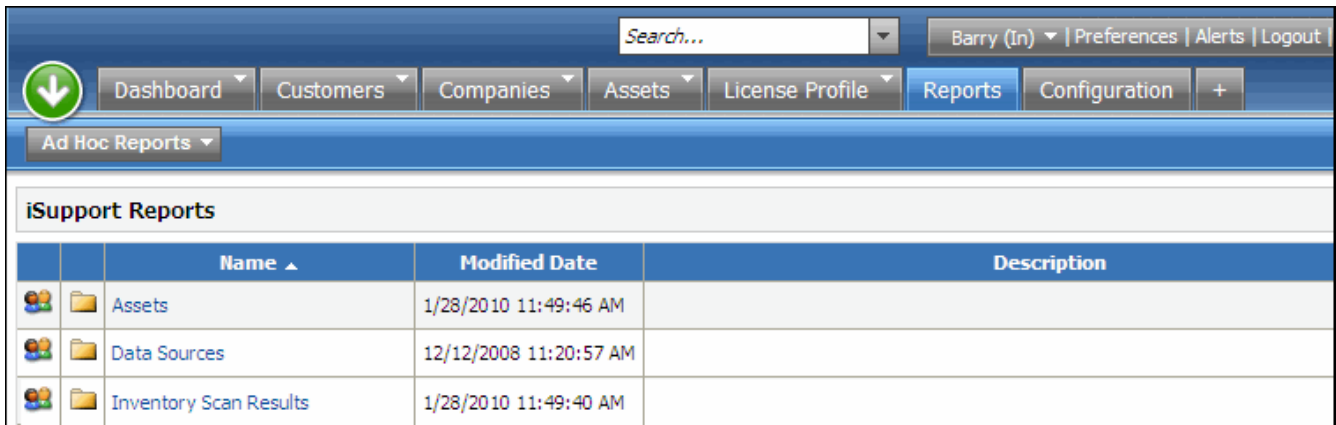
Viewing Audit History

After you save a license profile, entries appear on the Audit History tab. This tab includes a notation of every action performed on the record with the date, time, and author stamp.



7 Generating Reports

iSupport Asset's SQL reporting functionality is accessible if you have iSupport Asset's Report Viewer permission.



Viewing a Report

To display a report, click on its title. The report appears in a Report Viewer with paging, zoom, search, and print options. Note that due to a limitation in Microsoft's RSClientPrint control, iSupport Asset's SQL Report Viewer functionality is only supported with Microsoft® Internet Explorer®. Mozilla® Firefox®, Google™ Chrome, and Apple® Safari® can be used to view a report, but certain reporting features are not supported with those browsers. You can export a report in one of the following formats: XML file with report data, CSV (comma delimited), TIFF, Acrobat (PDF), Web archive, and Excel.

Access to SQL-based iSupport Asset reports and report folders can be restricted via group access permissions; if the Manage Folders and Reports permission is enabled in your Support Representative Profile record, the Group Access  icon will appear next to the folders and

reports on the Reports tab. Click the icon to display the following dialog for selecting the support representative groups that can access the report or folder.

iSupport Reports/Assets - Access Management: Assets by Maintenance Renewal Date

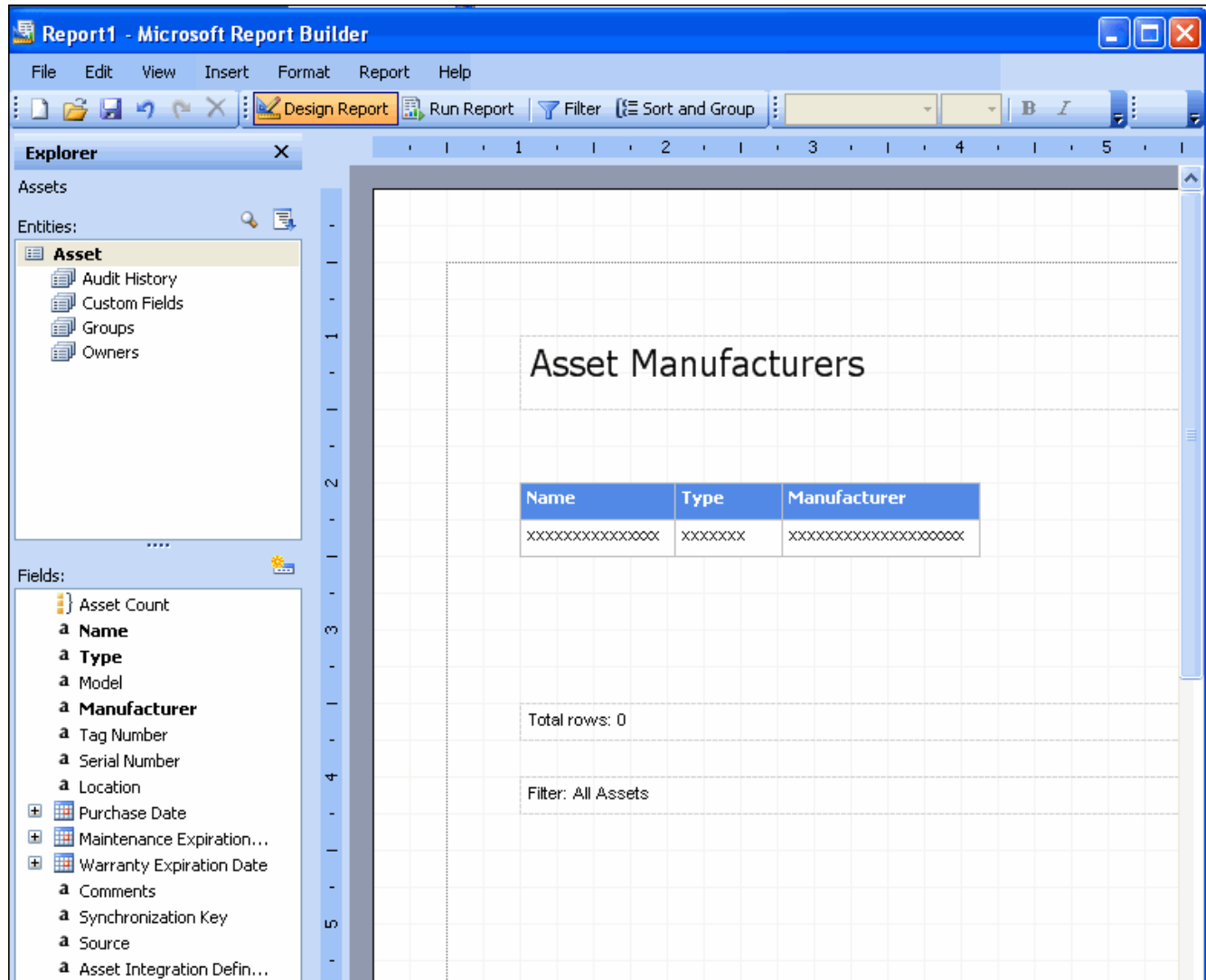
Restricted to the following groups:
[Add](#) [Remove](#)

<input type="checkbox"/>	Name ▲	Type
<input type="checkbox"/>	Applications	Support Representative
<input type="checkbox"/>	Development	Support Representative

Creating an Ad Hoc Report

iSupport Asset includes report models of iSupport Asset database data built with Microsoft Report Designer. If you have a version of Microsoft SQL Server 2005 other than Express Edition, you can create reports based on these models using Microsoft Report Builder and Microsoft Report Designer. If you have iSupport Asset's Ad Hoc Reports permission, you can access Microsoft Report Builder via the iSupport Asset Reports tab to create ad hoc reports using a simple drag and drop interface. You can view SQL reports via the Reports tab or Report Viewer on the Desktop if the report is saved in the cSupport/Reports folder (or any subfolder underneath it) on your report

server. More information on this feature is available by selecting Ad Hoc Reports | Documentation on the Desktop Reports tab.



8 Getting Help

This is a free utility and support is not included. Comments and feedback can be sent to iSupportAsset@GWI.com.

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