



iSupport® Asset Administrator's Guide

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Groupware Incorporated d.b.a. GWI Software
110 E 17th Street
Vancouver, Washington 98663
Phone: 360-397-1000
Fax: 360-397-1007

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- 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 Getting Started with iSupport Asset Administration

iSupport® Asset helps support representatives perform help desk functions such as setting up customers and companies and creating and managing assets. Administrators can enable and configure all features in the application.

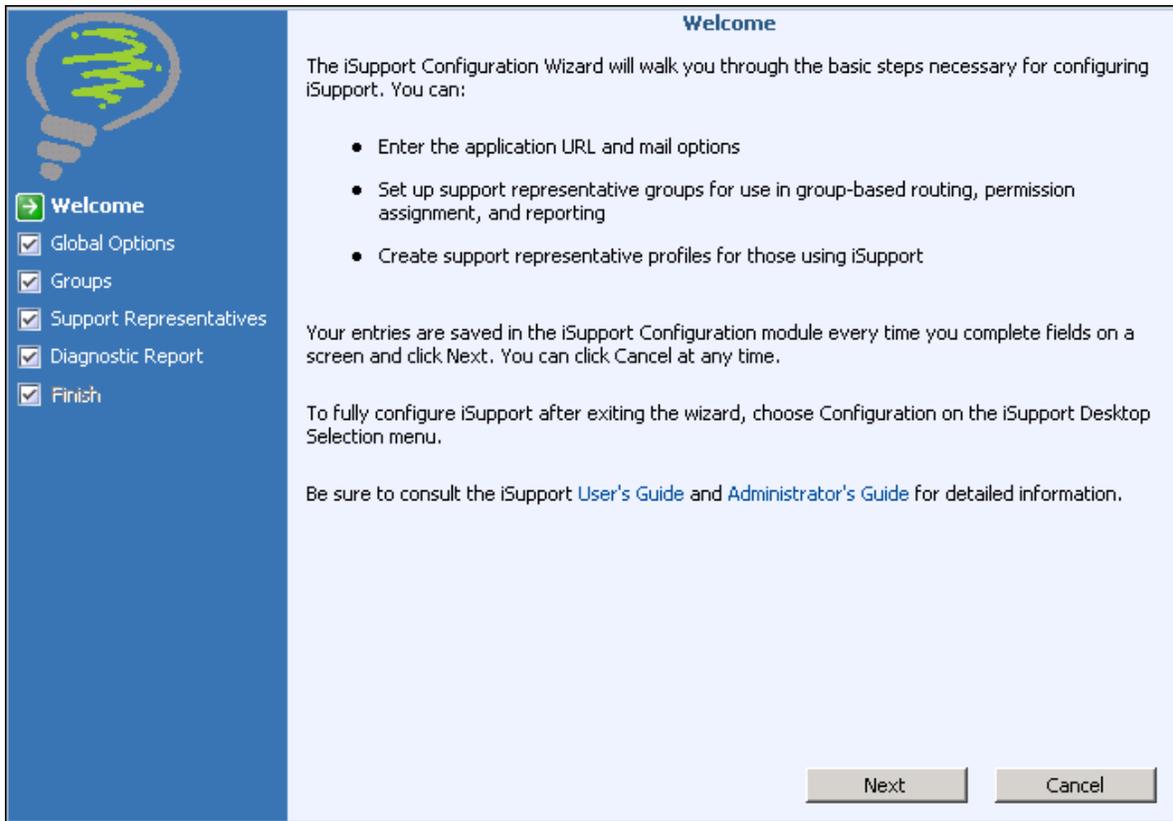
iSupport Asset Documentation

This guide provides information on enabling and setting up all iSupport Asset functionality. The *iSupport Asset Installation Guide* contains information on how to install the product. The *iSupport Asset User's Guide* contains information on entering and viewing customer profiles, companies, assets, software license profiles in the iSupport Asset application. Access these guides 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 Configuration Wizard

After you install iSupport Asset and access the Desktop for the first time, the Configuration Wizard appears for you to set basic configuration options that will get you started with iSupport Asset.

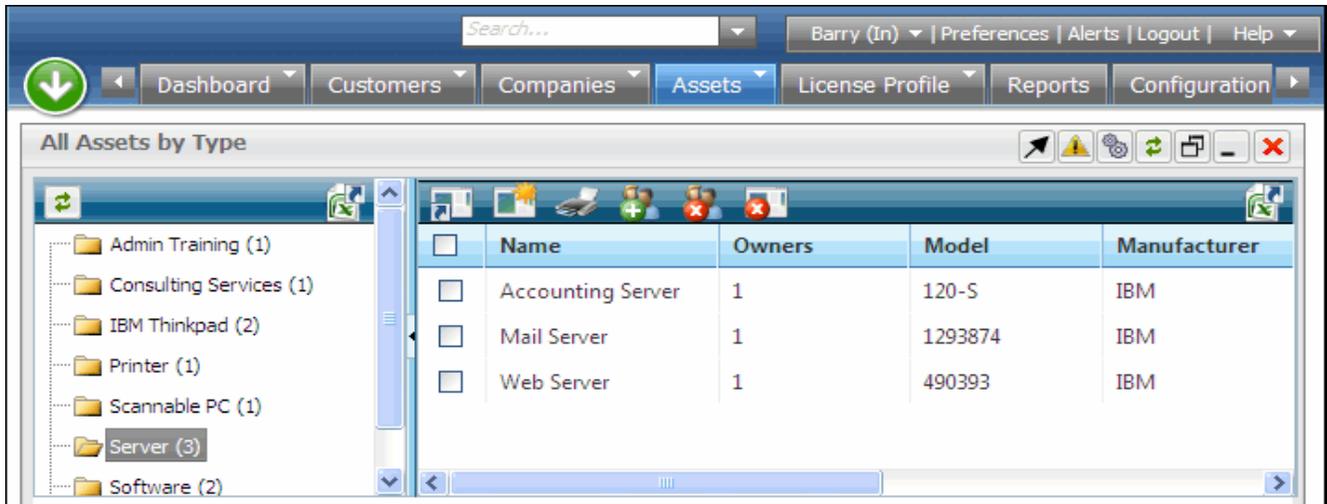


You'll be able to enter the application URL and mail options, create support representative groups and profiles, and enable notifications. Be sure to set up a support representative profile in the Administrators group for yourself.

A diagnostic report will be generated at the end of the wizard to document your settings.

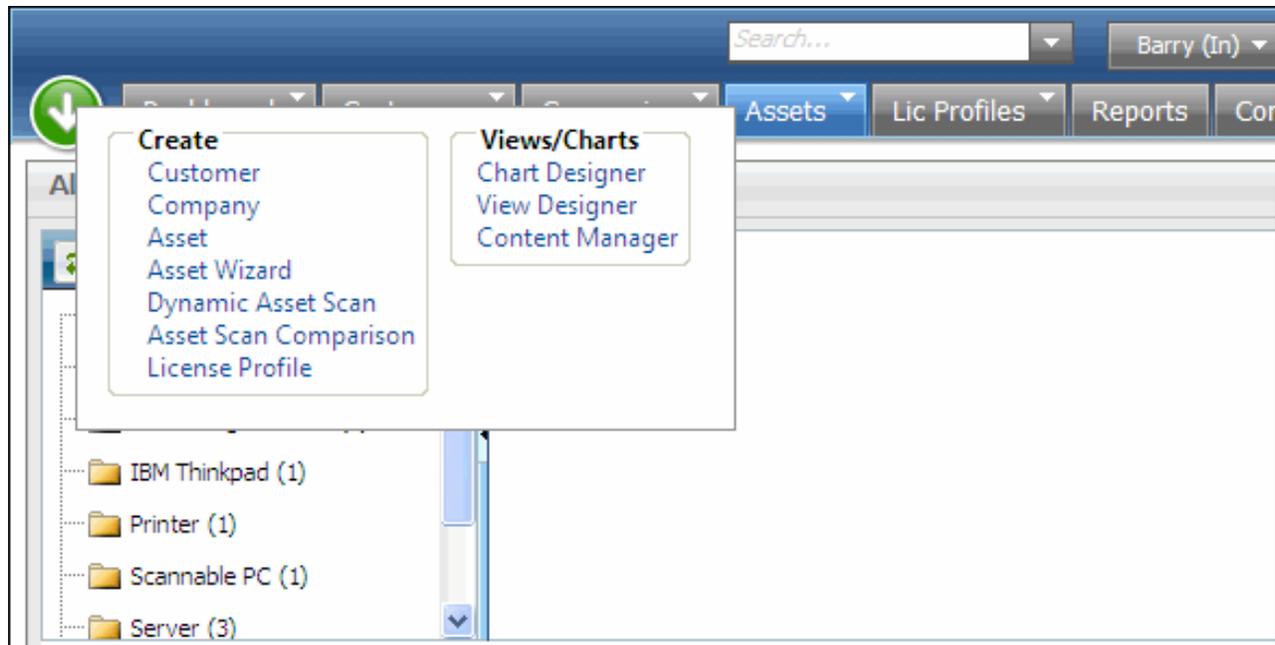
The Desktop

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 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.

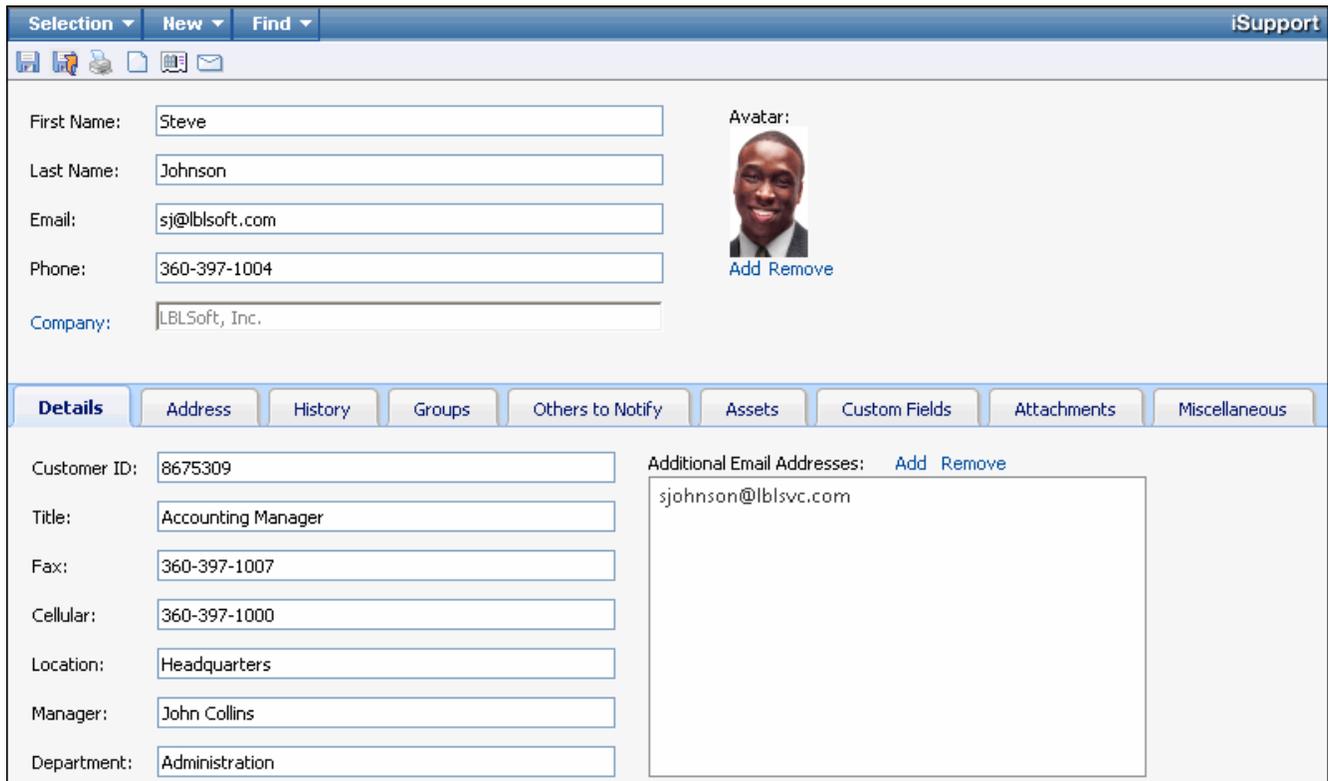
Configuration ?

<p>Administration  This section contains options central to configuring and monitoring iSupport functionality. Agents, Diagnostics, Email, Event Log, Global Configuration, Image Management</p> <p>Change Management  iSupport's Change functionality enables you to record, automate, and control requests related to services and assets. Approval Cycles, Basics, Categories, Change Templates, Custom Fields, Custom Status Labels, Hierarchy Templates, Impact and Urgency, Service Level Agreements</p> <p>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, Change Custom Notifications, Configuration Item Custom Notifications, Correspondence Templates, Incident Custom Notifications, Problem Custom Notifications, Purchase Custom Notifications, Service Contract Custom Notifications</p> <p>Incident Management  iSupport's Incident functionality enables you to efficiently record, track, and resolve incidents. Approval Cycles, Basics, Categories, Custom Fields, Custom Status Labels, Hierarchy Templates, Incident Templates, Service Level Agreements</p> <p>Problem Management  iSupport's Problem functionality enables you to document and track the root cause of issues and incidents. Basics, Categories, Custom Fields, Custom Status Labels, Impact and Urgency</p> <p>Service Catalog Management  Use Service Catalog functionality to utilize Purchase and Change templates for tracking customer requests for items such as products and services. Catalog Sections</p> <p>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</p>	<p>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</p> <p>Configuration Management (CMDB)  iSupport's CMDB functionality enables you to set up and track configuration items and their relationships. Custom Fields, Custom Status Labels, Groups, Integration, Relationships, Types</p> <p>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. Company Relationship Labels, Custom Fields, Directory Integration, End User Desktop, Groups, Surveys</p> <p>Knowledge Resources  iSupport's Knowledge functionality enables you to set up a knowledge base. You can optionally enable approvals, RightAnswers, and feedback features. Custom Fields, Knowledge Management</p> <p>Purchasing  iSupport's Purchasing functionality enables you to request products and generate purchase orders from these requests. Approval Cycles, Basics, Cost Centers and Job Functions, Custom Fields, Custom Status Labels, Purchase Request Templates, Vendor Product Import</p> <p>Service Contracts  iSupport's Service Contract functionality tracks and restricts incidents and changes based on customers, companies, and/or assets. You can set up contracts based on incident count, duration, or both. Basics, Custom Fields, Custom Status Labels, Service Contract Templates</p>
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Options Available on the Desktop

Tracking Customers

Support representatives can record contact, login, and company information for customers. A custom service level agreement can be associated with a customer if applicable. Comments can be entered for display when the customer is selected. You can set up custom fields for the Customer Profile screen for recording customer-specific information.



The screenshot shows the iSupport Customer Profile interface. At the top, there are menu options: Selection, New, Find, and iSupport. Below the menu is a toolbar with icons for file operations. The main form contains the following fields:

- First Name: Steve
- Last Name: Johnson
- Email: sj@lblsoft.com
- Phone: 360-397-1004
- Company: LBLSoft, Inc.

To the right of these fields is an Avatar section with a photo of a man and the text "Add Remove".

Below the main form is a tabbed interface with the following tabs: Details (selected), Address, History, Groups, Others to Notify, Assets, Custom Fields, Attachments, and Miscellaneous.

The Details tab shows the following information:

- Customer ID: 8675309
- Title: Accounting Manager
- Fax: 360-397-1007
- Cellular: 360-397-1000
- Location: Headquarters
- Manager: John Collins
- Department: Administration

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

The Active Directory® Integration feature enables an agent that updates the records in iSupport Asset Customer Profiles with the information in one or more Active Directory® sources. For more information, see [“Integrating with Active Directory®” on page 193](#).

The LDAP integration feature enables an agent that, based on the email address, updates the records in iSupport Asset Customer Profiles with the information in one or more LDAP sources such as e-Directory. For more information, see [“Integrating with LDAP” on page 200](#).

The Domino Directory Integration feature enables you to perform a scheduled one-way synchronization between a specified IBM Lotus®/Domino™ Directory (previously termed “NAB”) and the iSupport Asset customer table. For more information, see [“Integrating with Domino Directory” on page 206](#).

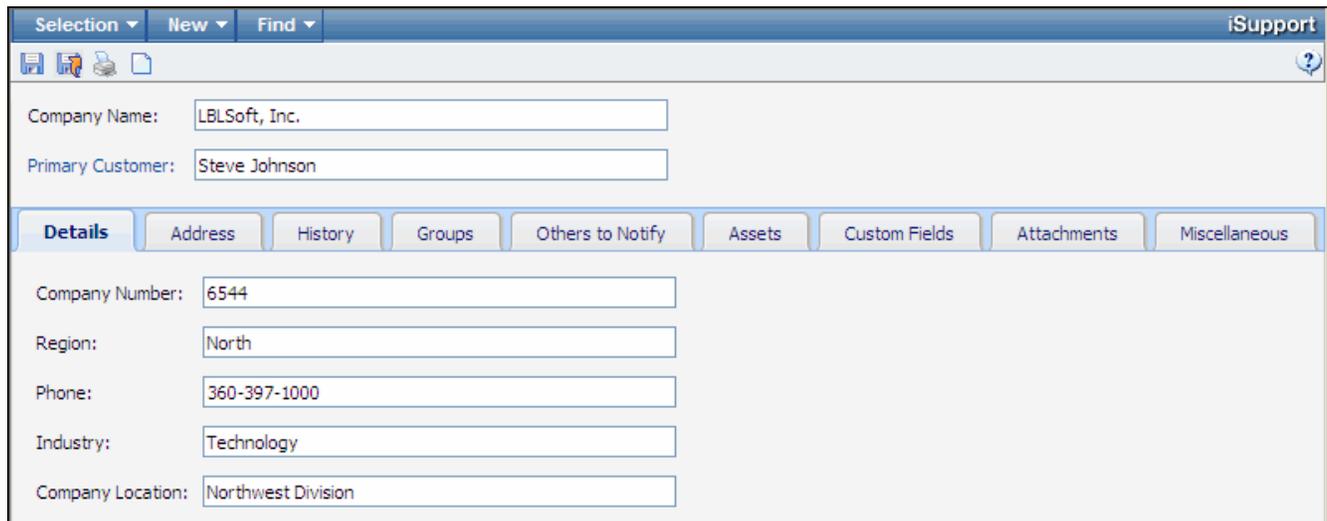
The Microsoft® CRM Integration feature enables an agent that updates the records in iSupport Asset Customer Profiles with the information in Microsoft® Customer Relationship Management. For more information, see [“Integrating with Microsoft® CRM” on page 208](#).

The Remote Database Integration feature enables you to perform a scheduled one-way synchronization between a specified Microsoft SQL Server database and the iSupport Asset

Customers table. For more information, see [“Integrating With Other Remote Databases”](#) on page 210.

Tracking Companies

Support representatives can record the following for a company: primary customer, identification and address information, custom fields, group membership, others to notify, attachments, and miscellaneous information such as comments to display when a customer of the company is selected.



The screenshot displays the iSupport application interface for editing a company record. The window title is "iSupport". At the top, there are menu options: "Selection", "New", and "Find". Below the menu is a toolbar with icons for file operations and a help icon. The main form area contains the following fields:

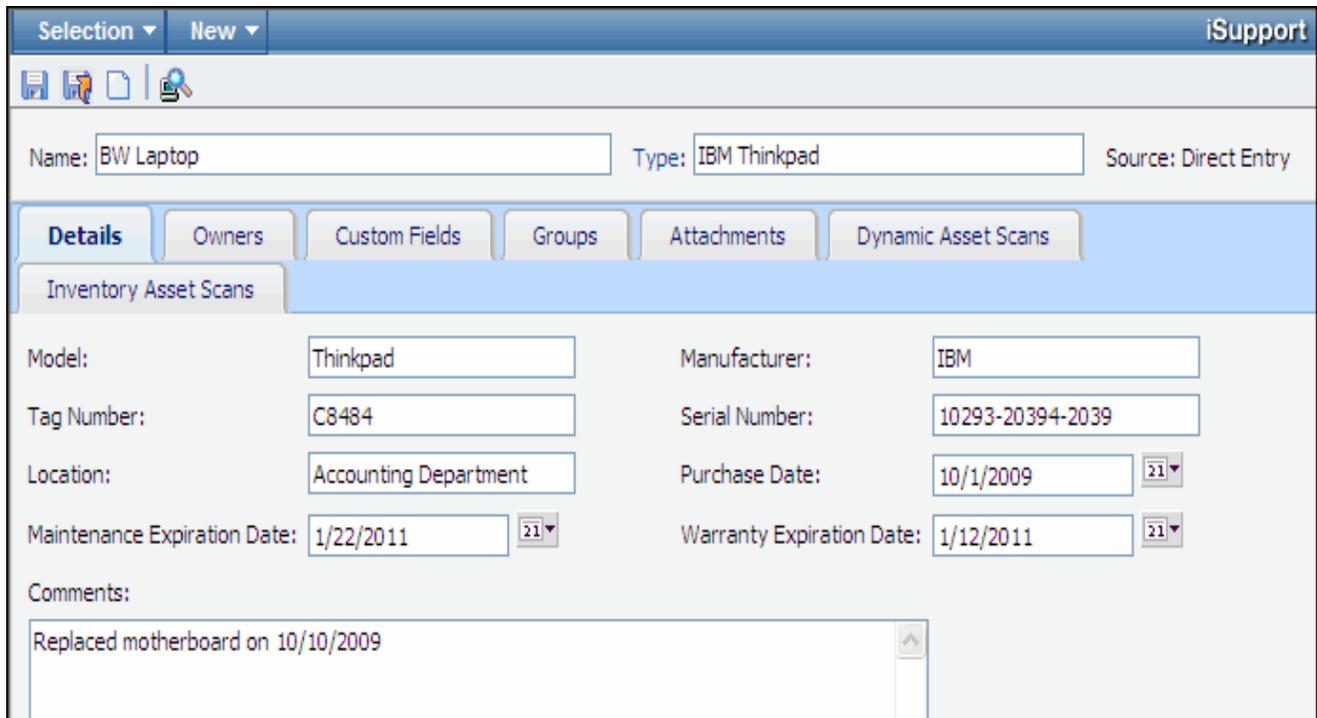
- Company Name: LBLSoft, Inc.
- Primary Customer: Steve Johnson

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

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

Tracking Assets

iSupport Asset's Asset functionality enables you to collect and record information about any type of item. This information can be associated with a Customer Profile or Company record. The Asset entry screen enables you to record identification numbers and purchase, warranty, and maintenance information if applicable.



The screenshot displays the iSupport Asset Administration interface. At the top, there are tabs for 'Selection' and 'New', and the 'iSupport' logo. Below this is a toolbar with icons for file operations and search. The main form area has a header with 'Name: BW Laptop', 'Type: IBM Thinkpad', and 'Source: Direct Entry'. Below the header are several tabs: 'Details', 'Owners', 'Custom Fields', 'Groups', 'Attachments', and 'Dynamic Asset Scans'. The 'Details' tab is active, showing a sub-tab for 'Inventory Asset Scans'. The form fields are organized into two columns. The left column contains: Model (Thinkpad), Tag Number (C8484), Location (Accounting Department), and Maintenance Expiration Date (1/22/2011). The right column contains: Manufacturer (IBM), Serial Number (10293-20394-2039), Purchase Date (10/1/2009), and Warranty Expiration Date (1/12/2011). At the bottom, there is a 'Comments' section with a text area containing the text 'Replaced motherboard on 10/10/2009'.

From the Asset screen, support representatives can dynamically scan a computer (Microsoft Windows® 98 and above or any other Windows® Management Instrumentation-compliant machine; WMI must be installed and active) or non-Windows devices on your local subnet. Hardware, software, and service details are collected automatically. You can associate a scan with an asset.

Asset scans can also 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. You can specify a range of IP addresses, domain names, or an Active Directory path to be scanned.

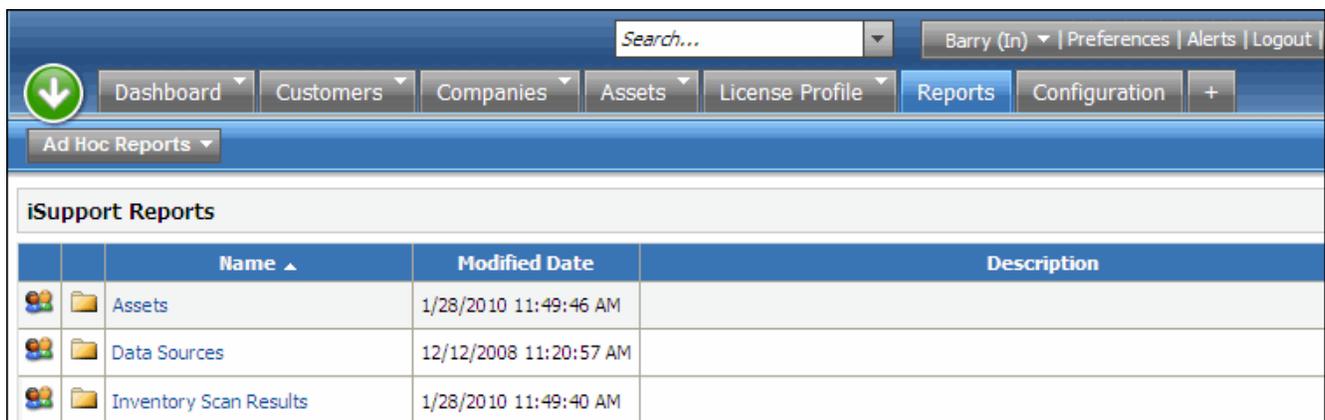
Count tracking can be enabled for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit List Price fields to appear in the Asset screen if the type is selected.

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 iSupport/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 Desktop Reports tab.

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.

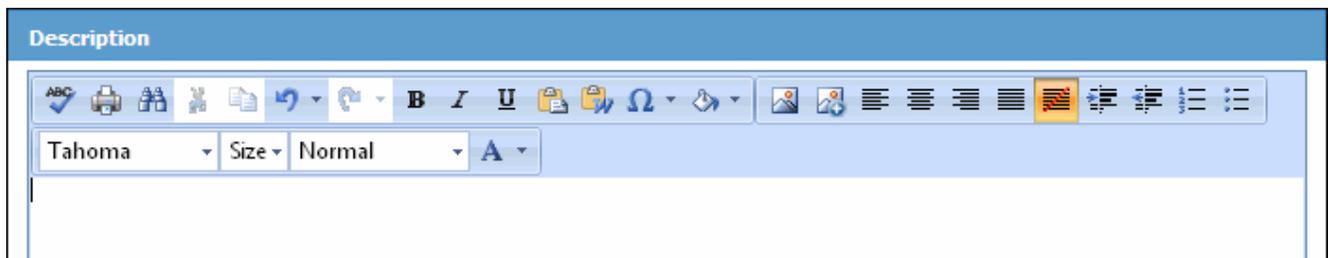


The screenshot shows the iSupport Asset Reports interface. At the top, there is a search bar and user information for Barry (In). Below that is a navigation menu with tabs for Dashboard, Customers, Companies, Assets, License Profile, Reports, and Configuration. The Reports tab is active, and there is a sub-tab for Ad Hoc Reports. The main content area is titled "iSupport Reports" and contains a table with the following data:

	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	

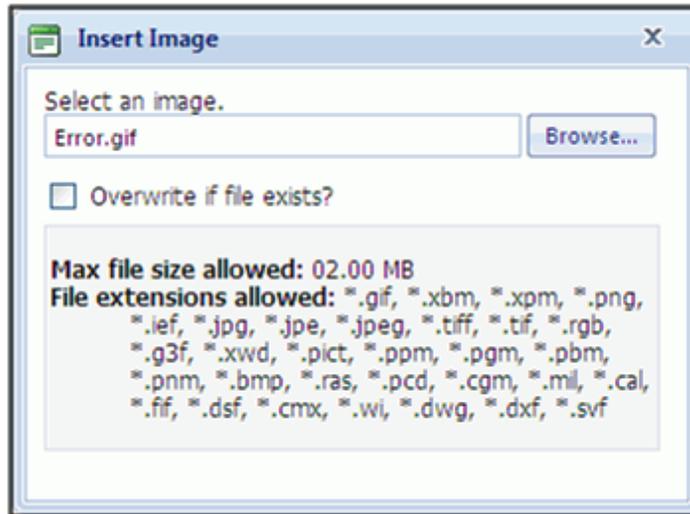
Using the Text Editor Toolbar

Use the HTML-based text editor toolbar to manipulate text and images in an entry field. 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 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.

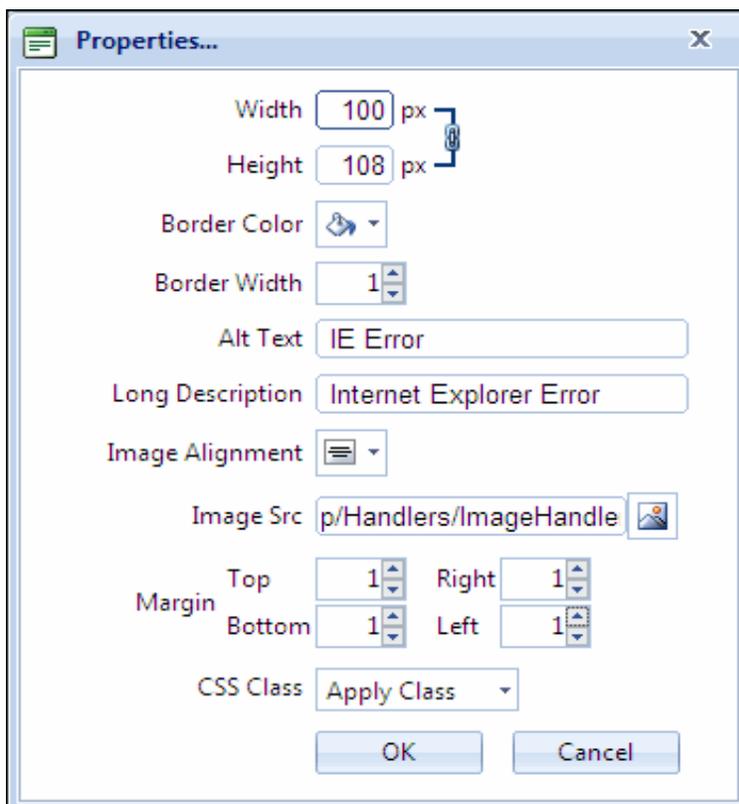


The image will be saved in a folder with the name of the support representative inserting the image. Access to images can be controlled; see [“Managing Access to Images”](#) on page 173.

- 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. See [“Using the Image Manager”](#) on page 20 for more information.

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.

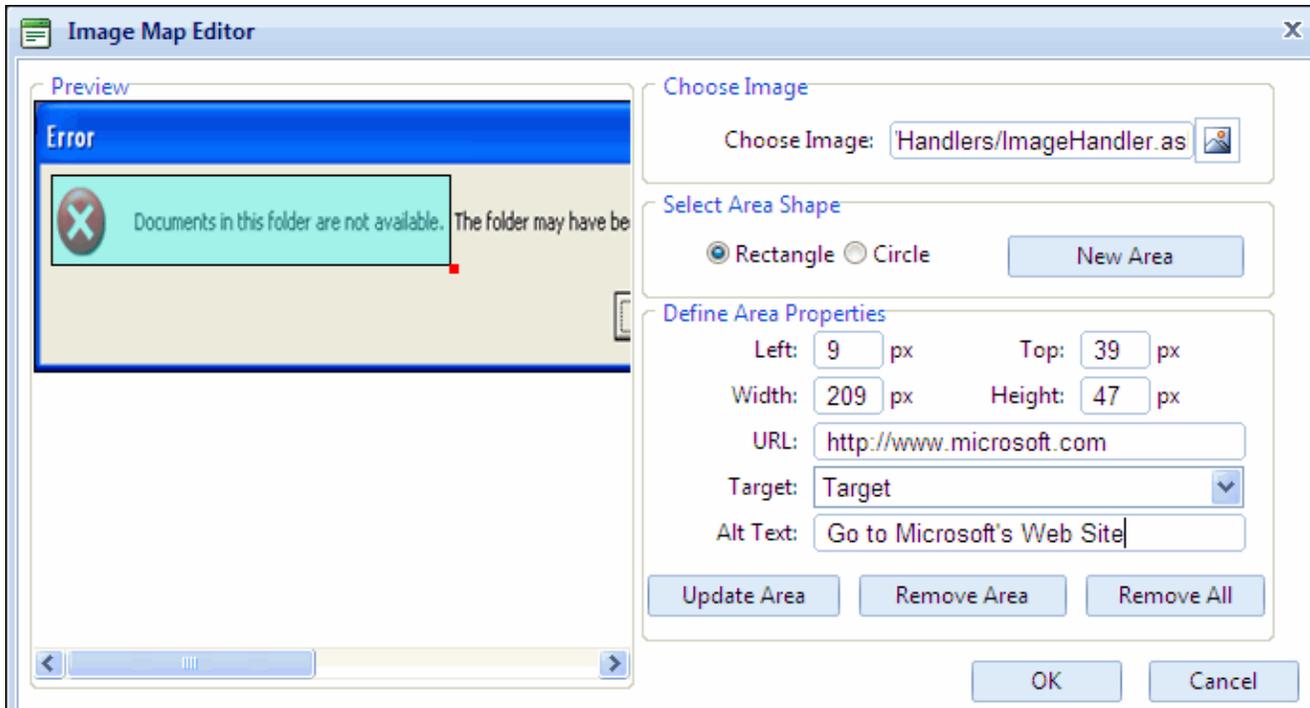


Field	Description
Width Height	Enter the width and/or height for display of the image. (The actual image file will not be changed.) Use the Constrain icon to lock and unlock the aspect ratio:  Locks the aspect ratio  Unlocks the aspect ratio
Border Color	Select the color of the border surrounding the 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 the 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.

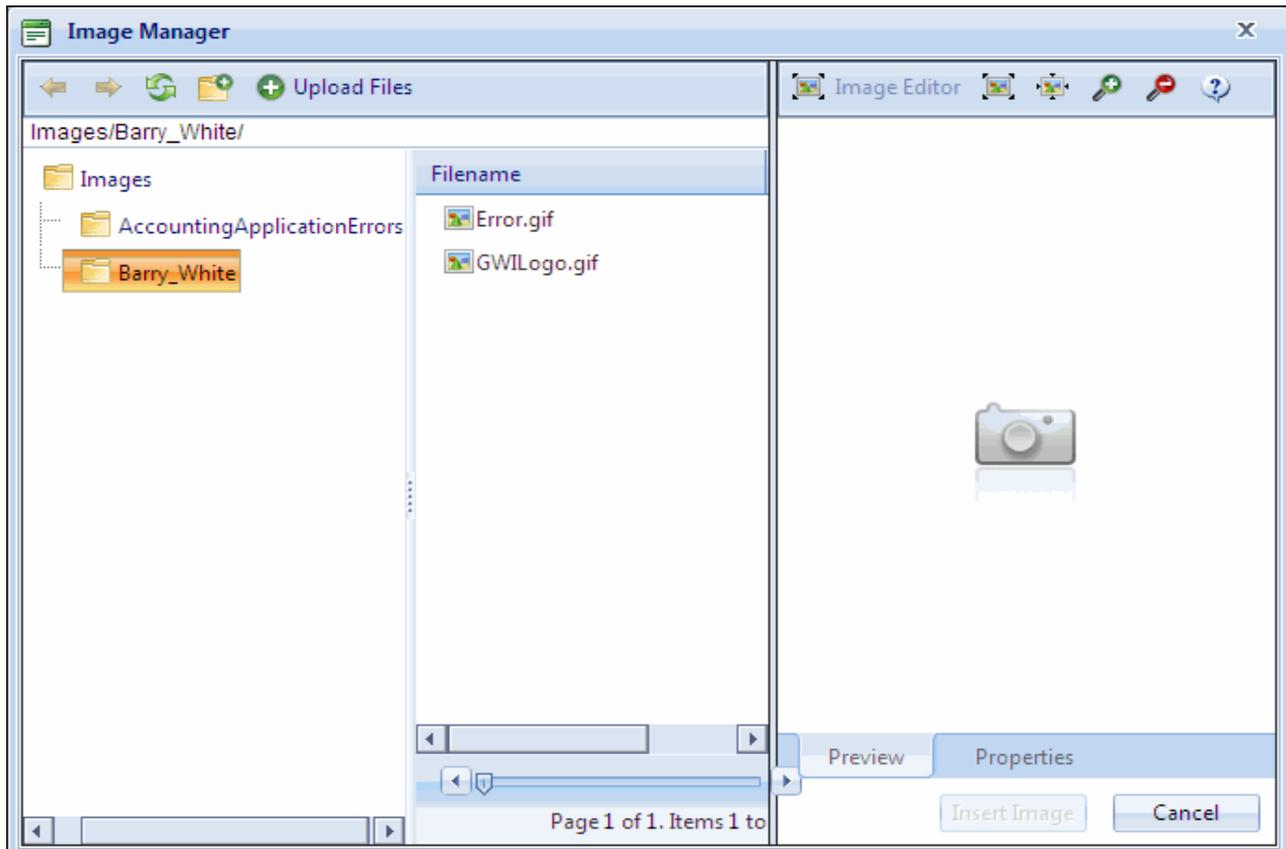
In the **Target** field, select how to display the web page to which the URL will appear.

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

When finished, click OK.

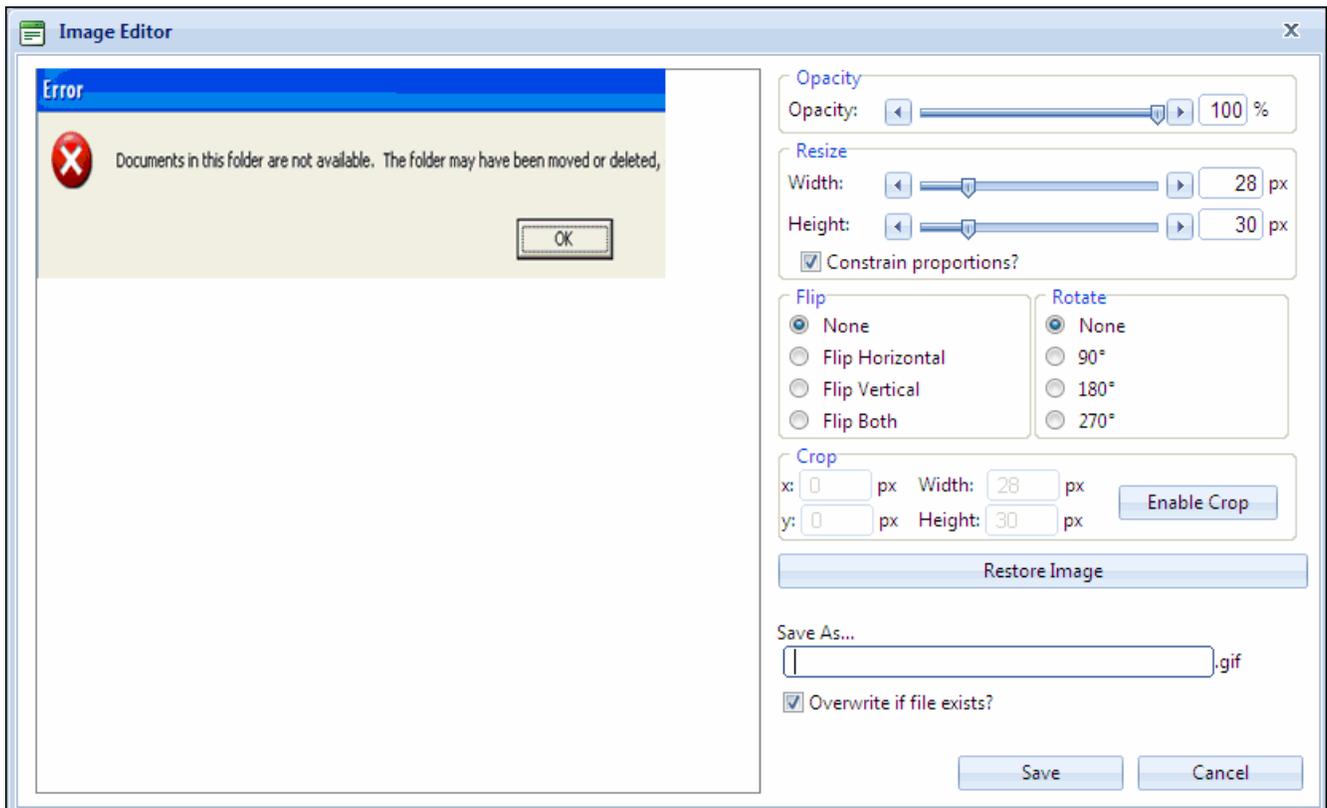
Using the Image Manager

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 graphic.
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.

Configuration Overview

Before You Begin

Because support organizations have unique aspects of operation and workflow, it is important that you document and discuss the operation of your organization as you expect it to operate with the implementation of iSupport Asset. Managing the expectations of both your staff and the customers you are supporting is important to the successful implementation of iSupport Asset. The following section may be helpful as you develop your implementation plan. We recommend that you implement functionality gradually.

Items to Consider When Implementing iSupport Asset

When planning your iSupport Asset implementation, consider the following:

- Plans for running parallel systems for a period of time. If you have an existing help desk tool, you may choose to manage all existing issues in your old system and create new records using iSupport Asset.
- Implementing a pilot phase. Some organizations start with a group of support representatives that use iSupport Asset within their environment. The result of the pilot phase is usually documentation describing the process and procedures for using iSupport Asset effectively within your support group.
- Training support representatives on the use of iSupport Asset.
- Workflow. Many companies generate a workflow chart of their current processes and then compare it to the expectations of the process when utilizing iSupport Asset. This can help you determine the options to configure and the training issues to address.

The iSupport Asset Setup Process

- Follow the steps in the *iSupport Asset Installation Guide* to install the iSupport Asset application.
- The **Configuration Wizard** will appear when the Desktop is initially accessed. Complete the screens to set basic configuration options such as the application URL and mail options, support representative groups and profiles, and notifications.
- Use the **Global Configuration** screen to enable functionality and set options that affect the entire application. See [“Setting Global Configuration Options” on page 71](#).
- Set up **support representative groups** for controlling access to iSupport Asset functionality. See [“Setting Up Support Representative Groups” on page 81](#) and [“Setting Up Support Representatives” on page 97](#).
- Set up **support centers** for assigning support representatives to different areas within a single installation of iSupport Asset. You can associate different time zones with support centers for

business hour statistics and service level calculations. See [“Setting Up Support Centers” on page 77](#).

- If you wish to use locations for reporting, create **locations**. See [“Setting Up Locations” on page 79](#).
- Set up **Support Representative Profile records**, which include contact and login information, managers, groups, and availability. You can also set up permissions on an individual basis to allow or disallow access to iSupport Asset functionality. See [“Setting Up Support Representatives” on page 97](#).
- Create **customer groups** for sending correspondence and reporting via the Desktop. See [“Creating Customer Groups” on page 117](#).
- Set up **Asset** functionality:
 - If applicable, use the **Asset Type** screen to set up asset scan login information and fields for asset types. See [“Setting Up Asset Types” on page 136](#).
 - Create **inventory scan definitions** for assets to be scanned automatically on a scheduled basis. For more information, see [“Setting Up Inventory Scans” on page 154](#).
 - If applicable, create **Software License Profiles** for tracking instances of one or more software titles against a specified condition and quantity. You can configure notifications to be sent if the condition is met. See the *iSupport Asset User’s Guide* for more information.
- If applicable, set up **correspondence templates** for frequently used email text. See [“Setting Up Correspondence Templates” on page 125](#).
- If applicable, use the **Directory Integration** screen to utilize Active Directory®, Domino Directory, Microsoft® CRM, and/or Microsoft® SQL Server as a source for iSupport Asset's customer information and authentication. See [“Integrating with Active Directory®” on page 193](#), [“Integrating with Domino Directory” on page 206](#), [“Integrating With Other Remote Databases” on page 210](#), and [“Integrating with Microsoft® CRM” on page 208](#).
- Schedule **agents**, which perform tasks in the background such as sending notifications. See [“Scheduling and Running Agents” on page 176](#).
- View the **event log**, which reflects the date and time that iSupport Asset agents run. See [“Viewing the Event Log” on page 182](#).
- Run **diagnosis reports** for documenting current configuration settings. See [“Backing Up iSupport Asset Databases” on page 189](#).
- Use the **Reports** feature to generate reports of iSupport asset data and inventory scans.

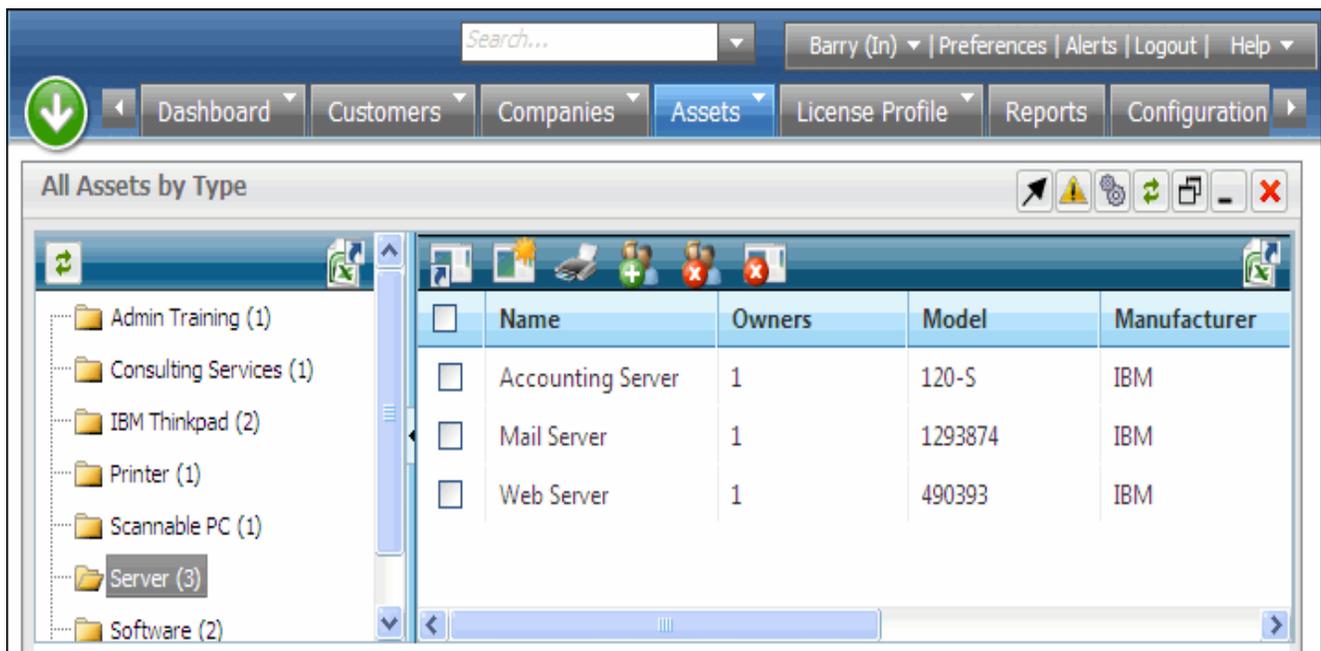


Date/time stamps rely on accurate time and time zone settings on the operating system of both clients and servers.

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 27](#) for more information.
- The Home and Views tabs are included by default in iSupport Asset; you can 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 31](#) for more information. See ["Using Views" on page 27](#) 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 35](#) for more information.
- Access the Chart Designer and manage access to charts. See ["Using the Chart Designer" on page 46](#) for more information.

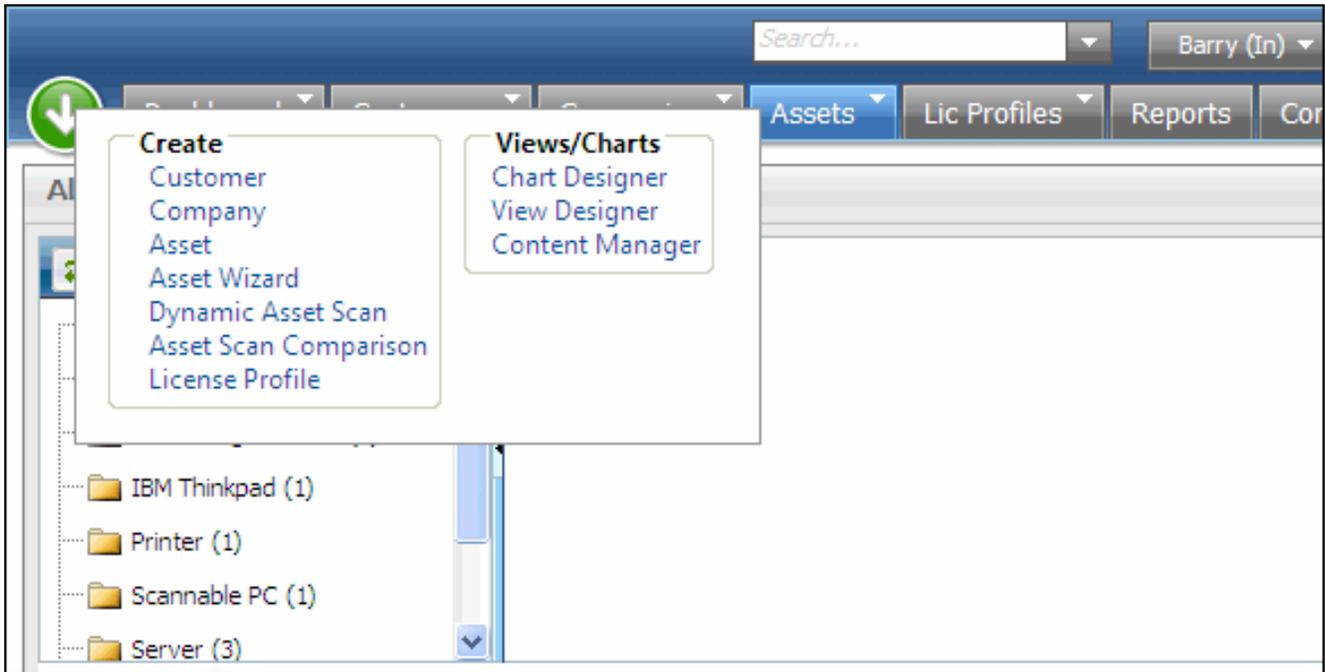
- Create alerts that will appear at the top of the Desktop tabs when a view field reaches a certain threshold. The alert can also be sent via email and page. See [“Creating Alerts” on page 53](#) for more information.
- Use the Content Manager to create, edit, copy, enable/disable, and delete a view or chart. See [“Managing View and Chart Content” on page 59](#).
- 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 60](#) for more information.
- Display a Reports tab for creating and viewing SQL reports. See [“Creating and Viewing SQL Reports” on page 68](#) 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 61](#) for more information.
- Add a customized toolbar for commonly used actions. See [“Configuring a Create Toolbar” on page 64](#).



Functionality may not appear for support representatives if permissions are enabled in the Configuration module. See [“Setting Up Support Representatives and Customer Groups” on page 75](#) for more information.

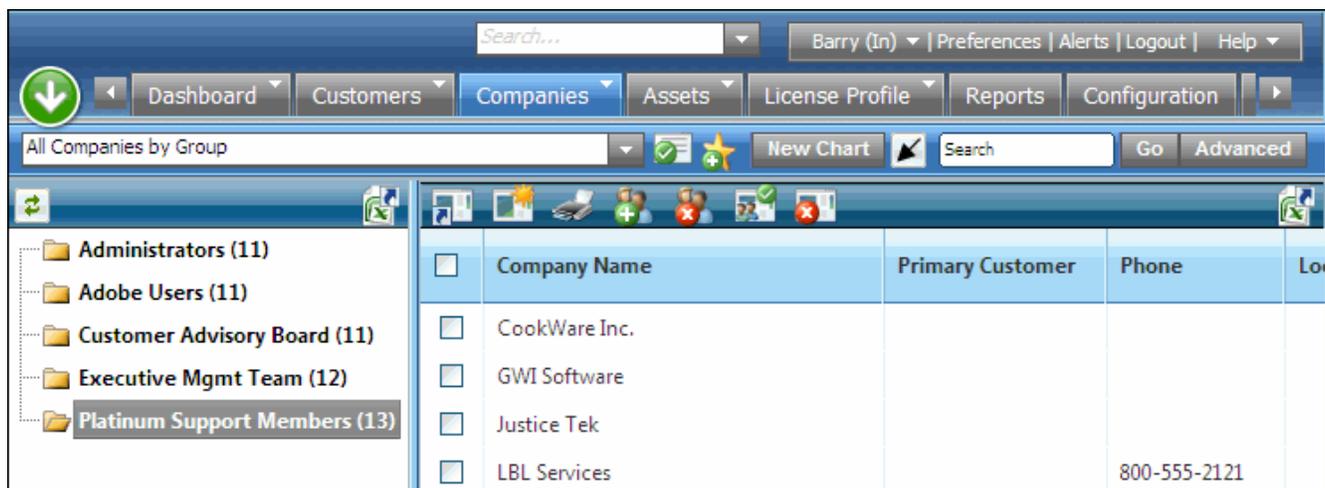
Using the Action Menu

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



Using Views

Use the view area to display, open, and report on iSupport Asset data. Use the View dropdown to select the view to display.



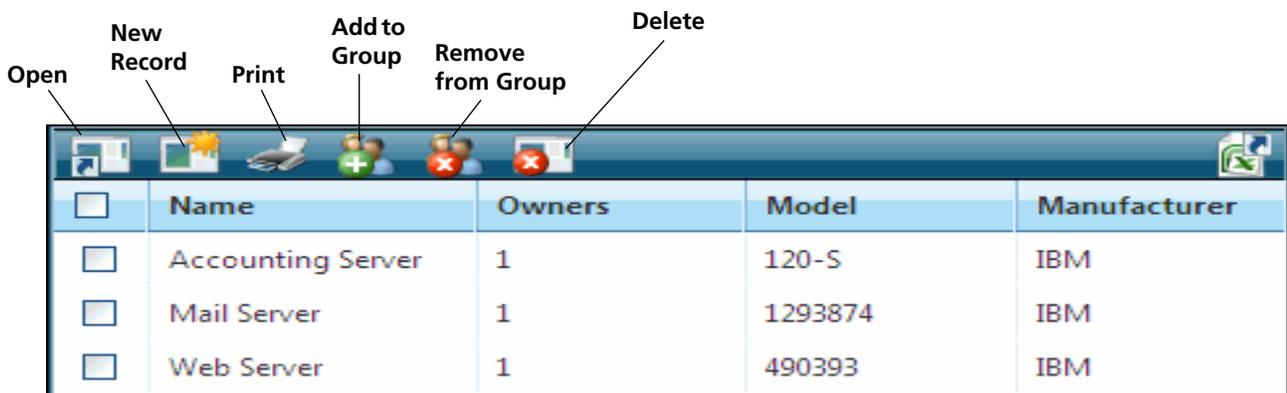
The following options appear when the view is maximized:

- Use the **Make Default**  icon to change the content of the view to the current view (applies to maximized content only).
- Use the **Add to Favorites**  icon add the current view to your Favorite Views list.

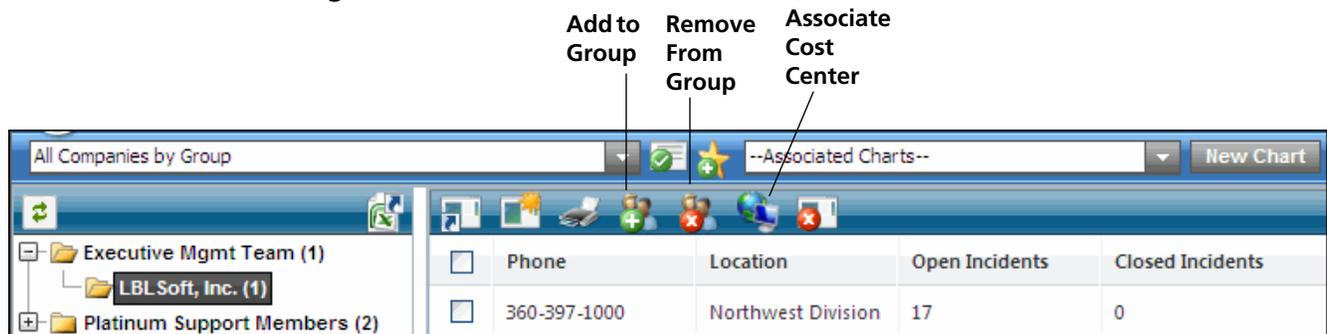
- Use the **Associated Chart** dropdown to display any chart associated with the view in a new window. The **New Chart** button displays the Chart Designer.
- Use the **Minimize in Tab**  icon to display the view in a frame instead of maximized in the tab.
- Use the **Search** field to perform a literal case-insensitive search for a character string within all data displayed in the current view. Press Control-Shift-F or 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.

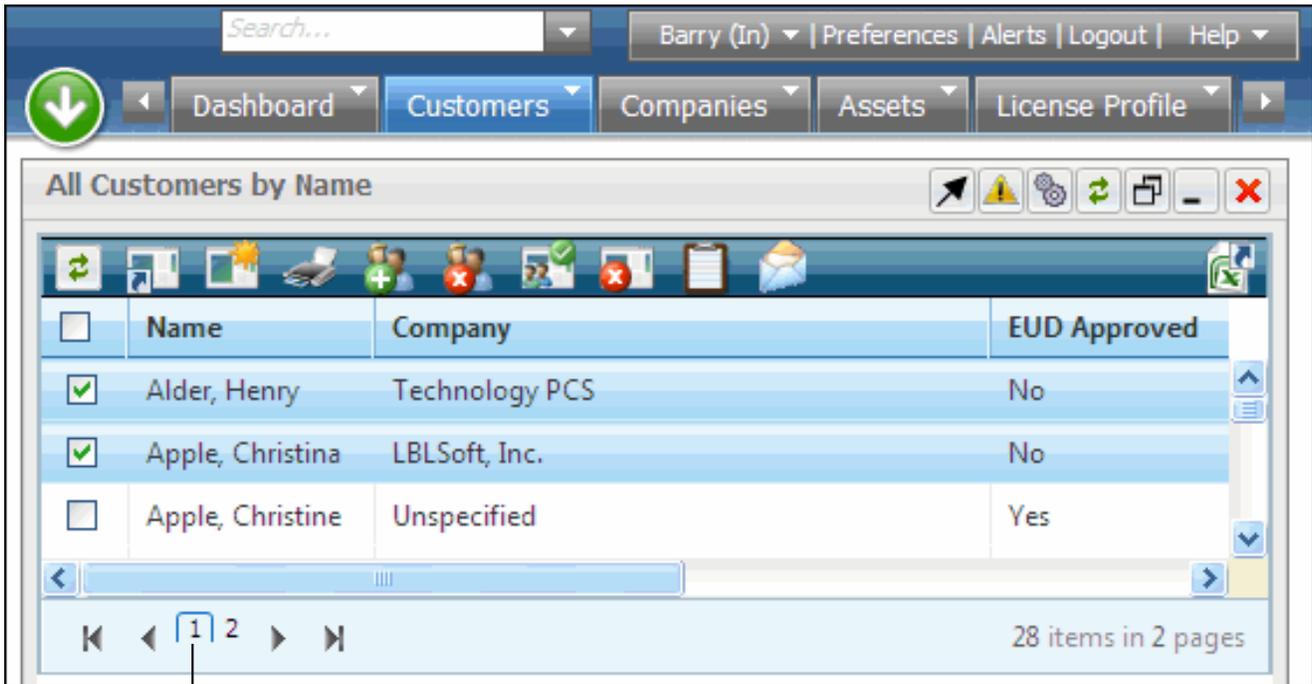
- Views do not refresh automatically when items are created, changed, or deleted. To refresh a view, click on the **Refresh**  icon.
- You can open any item in a view by clicking on it, and you can click on a column heading to sort it in ascending/descending order.
- Use the icons in the view column 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.



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:

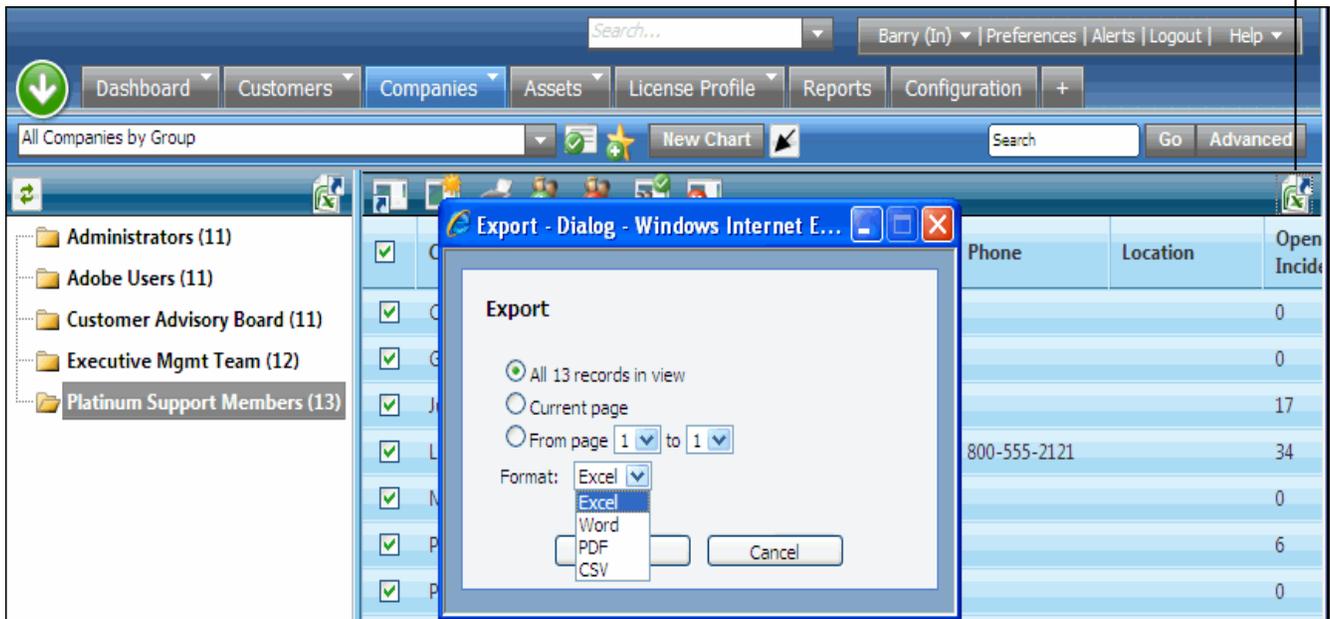
- Press Alt + to move forward one page
- Press Alt - to move back one page
- Press Alt > to jump forward to the last page
- Press Alt < to jump back to the first page

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.

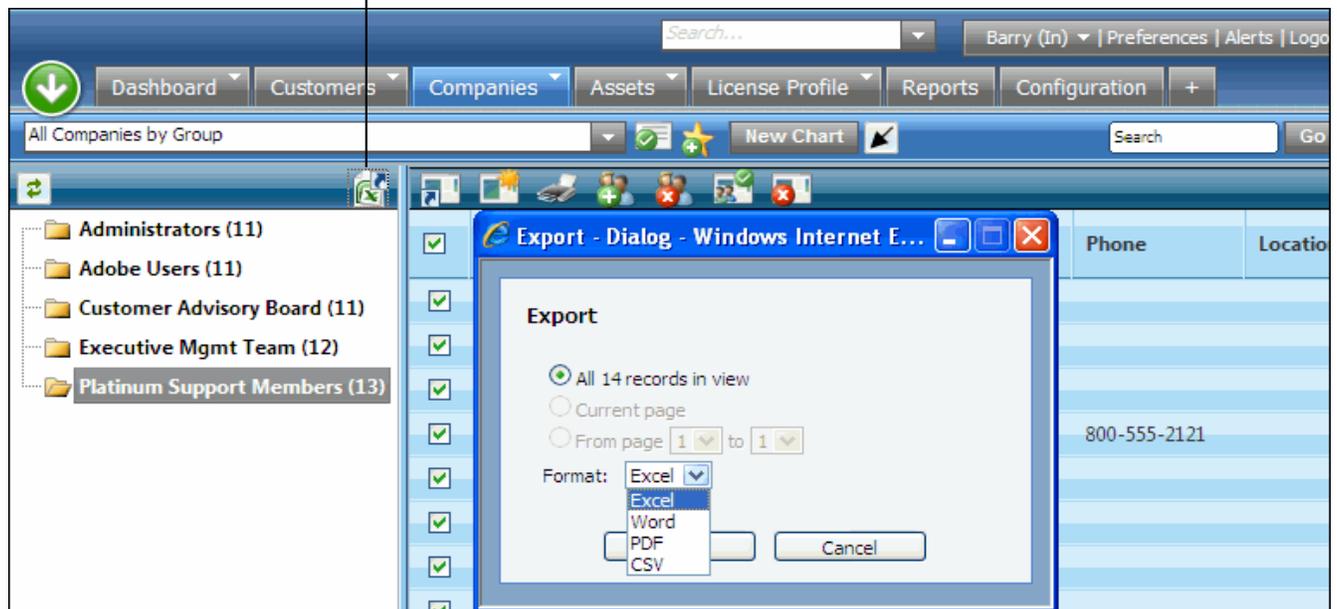
Use the Export icon in the right frame to export the data represented in the right frame; you'll be able to export all records at once, the current page, or a range of pages, all based on your current view, search, and sorting criteria.

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.

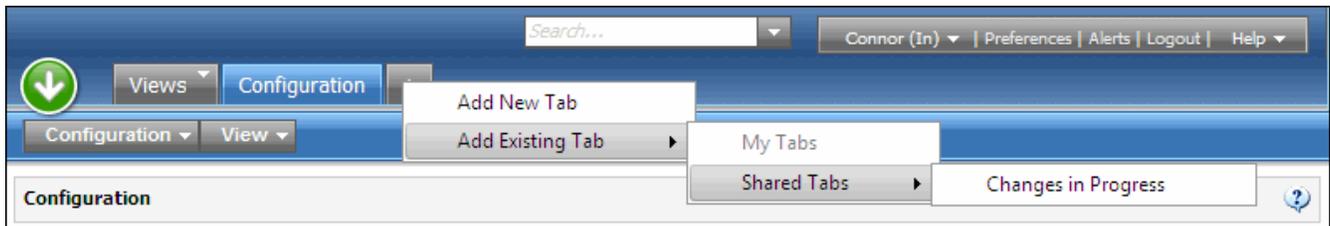
If you export more than Microsoft® Excel®'s limitation of 65,536 records, you'll have the option of exporting the data in comma-separated value (CSV) format or exporting only up to the limit of 65,536 records.

Working With Tabs

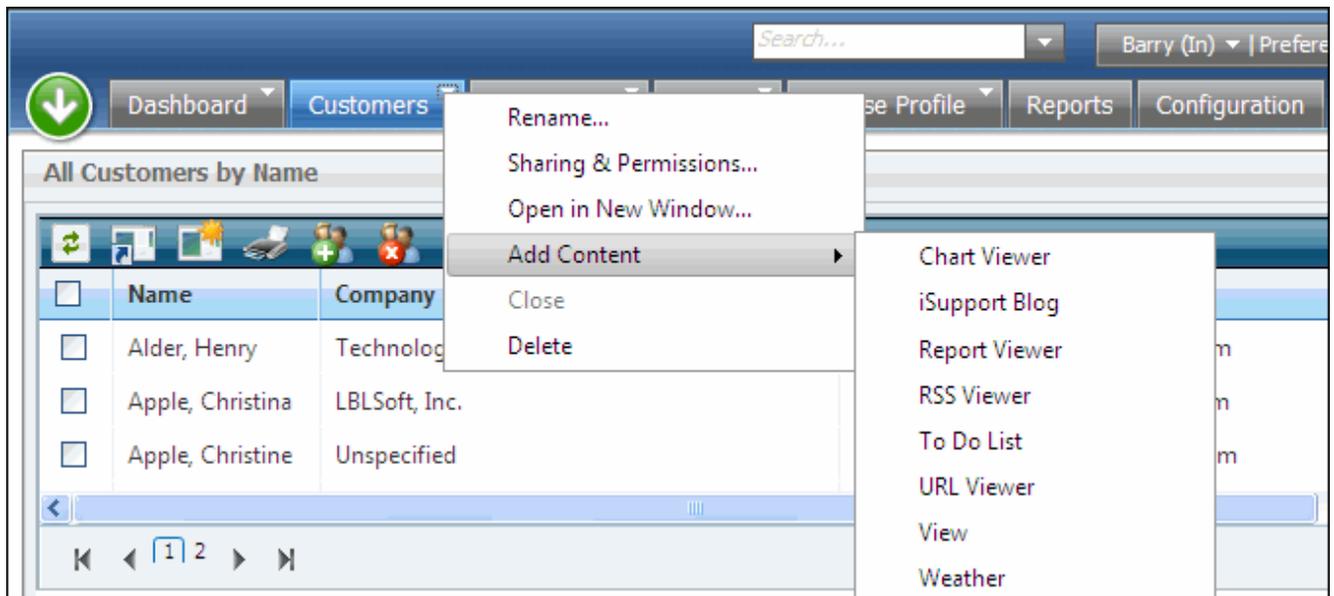
You can add charts, URLs, RSS feeds, reports, weather, and views of iSupport Asset data to Desktop tabs. You can also add a To Do list and include a field for searching for knowledge entries. The content can display in frames of varying sizes or maximized in the tab. You can save tabs for use later, 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 to display a menu for renaming, sharing, opening in a new window, adding content, closing, and deleting the tab.



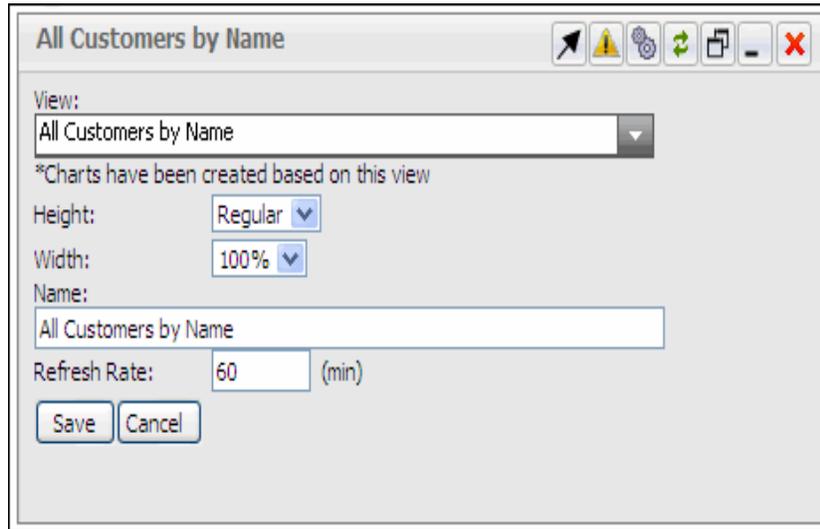
Adding Tab Content

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 46](#) for information on creating charts.
- **iSupport Blog** - The iSupport Blog enables you to view and comment on the iSupport and iSupport Marketing blogs.
- **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.
- **Twitter Viewer** - Displays Twitter entries for a valid Twitter account.
- **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 35](#) 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.

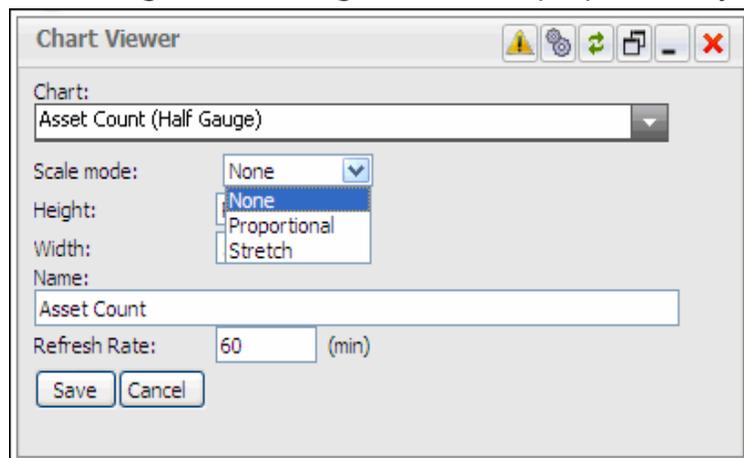
- **Weather** - Displays the weather report from www.nws.noaa.gov.

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:

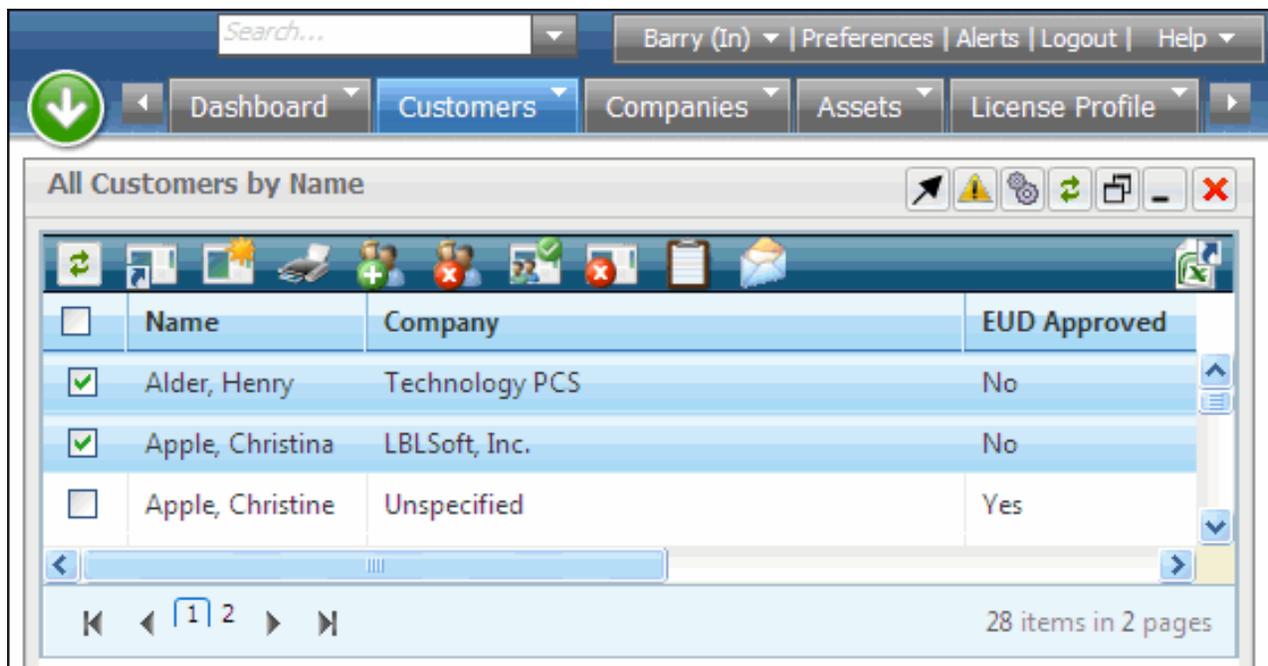


Field	Description
Height	Select the height of the component frame: Regular or Tall. Select Tall for content such as vertical thermometer charts.
Width	Select the percentage for the width of the component: 16%, 25%, 30%, 50%, 70%, or 100% of the Desktop window.
Name	Enter the name to appear at the top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

When displaying a gauge 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 gauge.



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

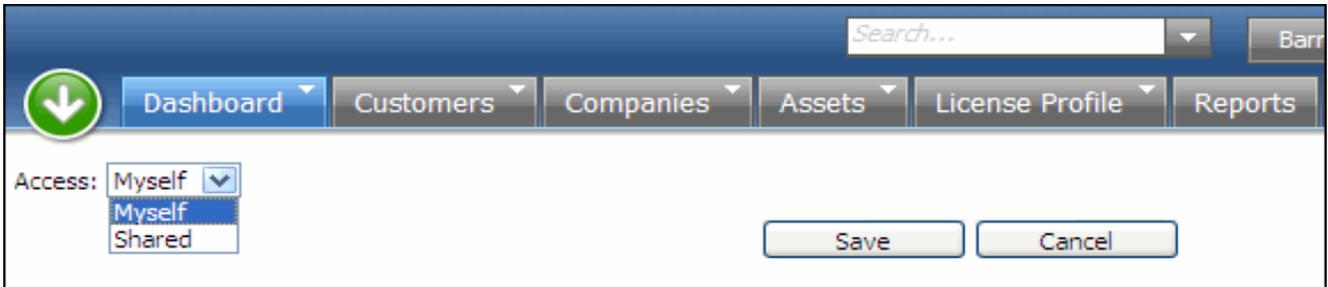
After frame content has been created, you can do the following:

- 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 53](#) 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 the 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. You can set support representative permissions on display of this field; see [“Permissions for Report Functionality”](#) on page 92 for more information.



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.

To further control tab access (including restricting access by group), select Support Representatives | Tabs in the Configuration module. See [“Managing Tabs for Support Representatives”](#) on page 115 for more information.

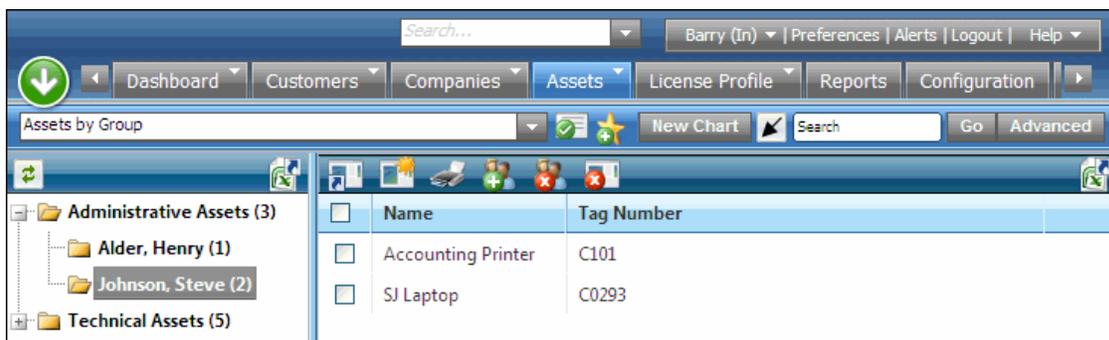
Using the View Designer

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:



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

View Name: Assets by Group --Associated Charts--

Access: Myself

Enabled: Yes No

Subfolder Name: Management Reports

Save Cancel New Chart New Alert

Design Preview

Data Source: Assets

For Records Pending Deletion: Exclude Records Pending Deletion

Asset fields	Remove	Column Heading	Filter	Folder Level	Column Display Order	Sort Order	Sort Direction	Column Width (px)	Null Text	True/False Text
Comments	<input type="checkbox"/>									
Company	<input type="checkbox"/>	Owners Name	Add	2	Hidden	2	Ascending	100	Unspecified	
Custom Fields	<input type="checkbox"/>	Groups Name	Add	1	Hidden	1	Ascending	100	Unspecified	
Groups	<input type="checkbox"/>	Name	Add	None	1	3	Ascending	100	Unspecified	
Is Inventory Type	<input type="checkbox"/>	Tag Number	Add	None	2	Unsorted	None	100	Unspecified	
Location	<input type="checkbox"/>									
Maintenance Expiration Date	<input type="checkbox"/>									
Manufacturer	<input type="checkbox"/>									
Model	<input type="checkbox"/>									
Name	<input type="checkbox"/>									
Owners	<input type="checkbox"/>									
Purchase Date	<input type="checkbox"/>									
Serial Number	<input type="checkbox"/>									
Service Contracts	<input type="checkbox"/>									
Source	<input type="checkbox"/>									

Naming the View and Specifying Access

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



The screenshot shows a configuration dialog box with the following fields and controls:

- View Name:** A text input field containing "Assets by Group" and a dropdown menu also showing "Assets by Group" with an "Edit" link to its right.
- Access:** A dropdown menu set to "Myself".
- Enabled:** Radio buttons for "Yes" (selected) and "No".
- Subfolder Name:** A dropdown menu set to "Management Reports".
- Buttons at the bottom: "Save", "Cancel", "New Chart", and "New Alert".

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 **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.

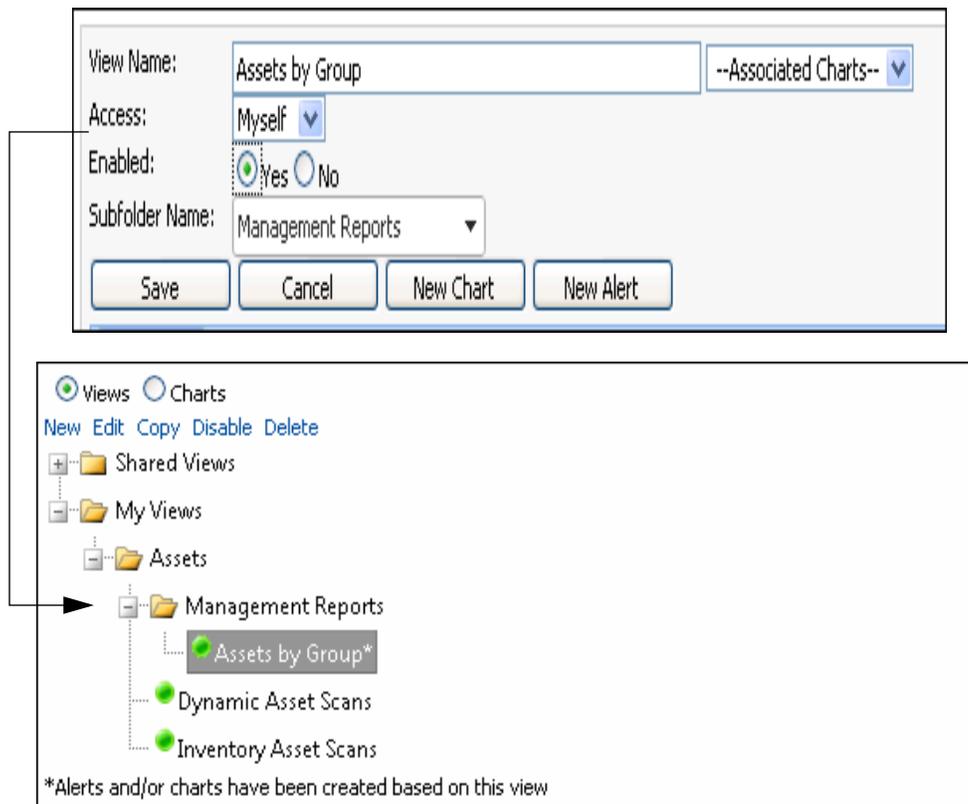


If you designate a view as Shared, it will appear to you under in the My Views folder; the My Views folder contains views that you have personally created via the View Designer.

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:



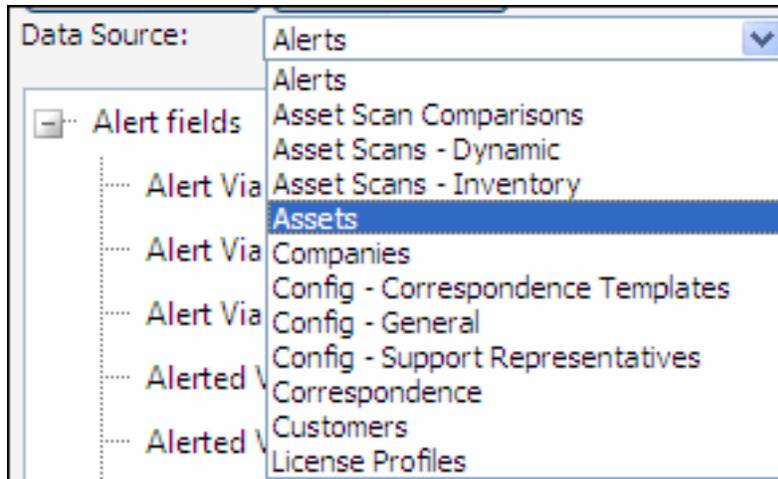
In the **Subfolder Name** field, enter the name of the folder in which to place the view in the Content Manager and in view lists. This folder will be placed under the folder named after the data source selected for the view.



Selecting the Data Source

Select the source of the data on which the view will be based. The Config options in the dropdown

list correspond to functionality enabled 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.



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

Using the For Records Pending Deletion Field

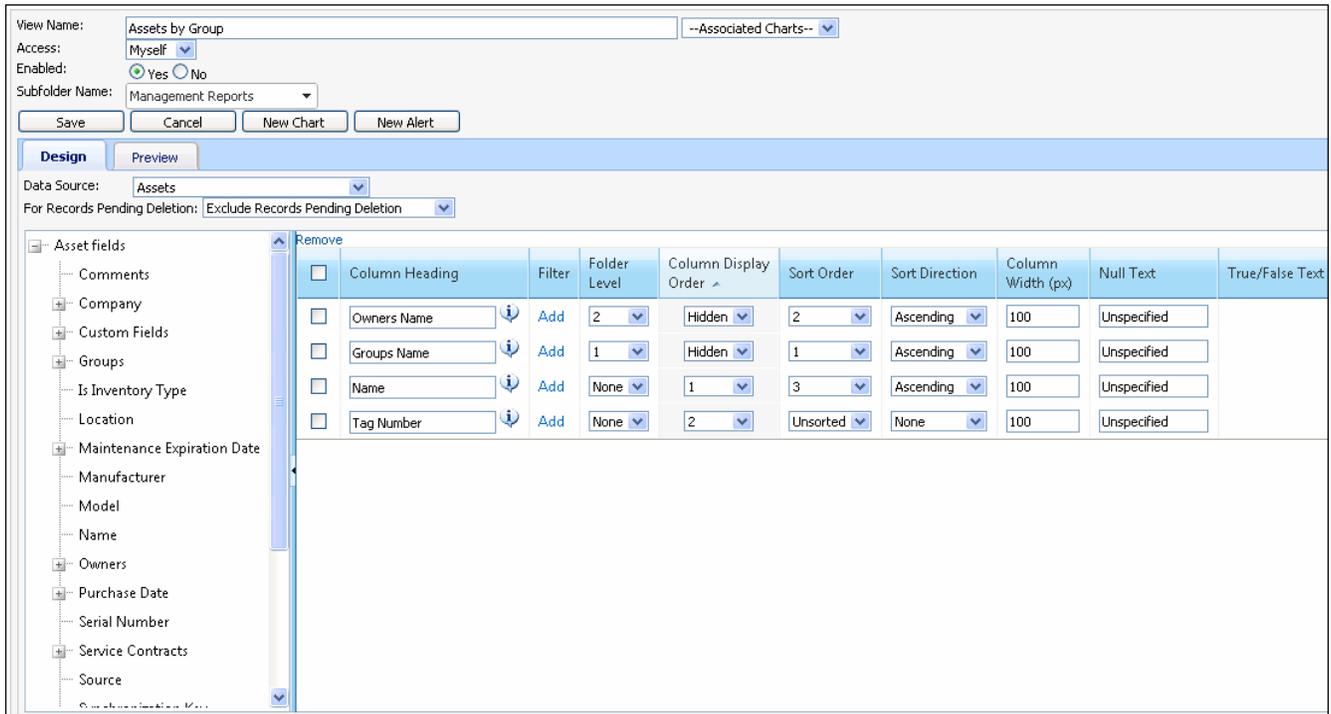
The **For Records Pending Deletion** field appears for data sources that have pending deletion functionality (Assets, Companies, Config - Support Representatives, and Customers).



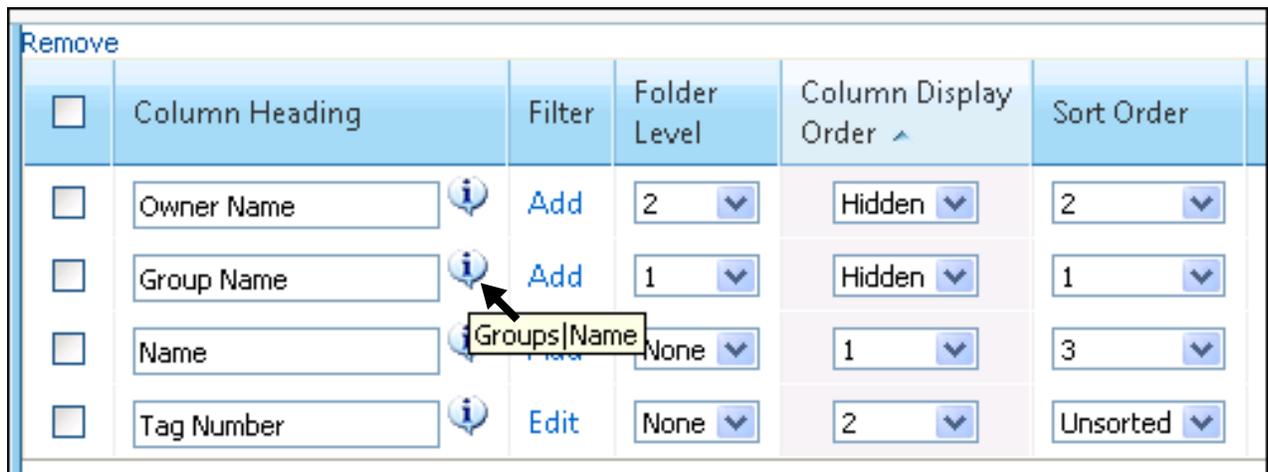
Records pending deletion have been deleted by an iSupport Asset user but are retained in the system because of references to other records (for example, correspondence). The Database Maintenance agent ultimately removes the record. Use the For Records Pending Deletion field to specify whether to include,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



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.



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.

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](#) [Finish](#)
Is Not Null [Add](#)
None
Contains
Does not contain
Is
Is Not
Is Null
Is Not Null
Starts with
Ends with

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

Is Not Null

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

The screenshot shows a software interface titled "Assets by Group". On the left, a tree view displays a hierarchy of folders: "Administrative Assets (6)", "Unspecified (1)", "Alder, Henry (1)", "Apple, Christine (1)", "Johnson, Steve (2)", "Ryan, Bob (1)", "Server Group Assets (3)", and "Technical Assets (5)". Two arrows point to "Administrative Assets (6)" and "Johnson, Steve (2)", labeled "Folder level 1" and "Folder level 2" respectively. On the right, a table lists assets:

Name	Tag Number
Accounting Printer	C101
SJ Laptop	C0293

Settings in View Designer

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

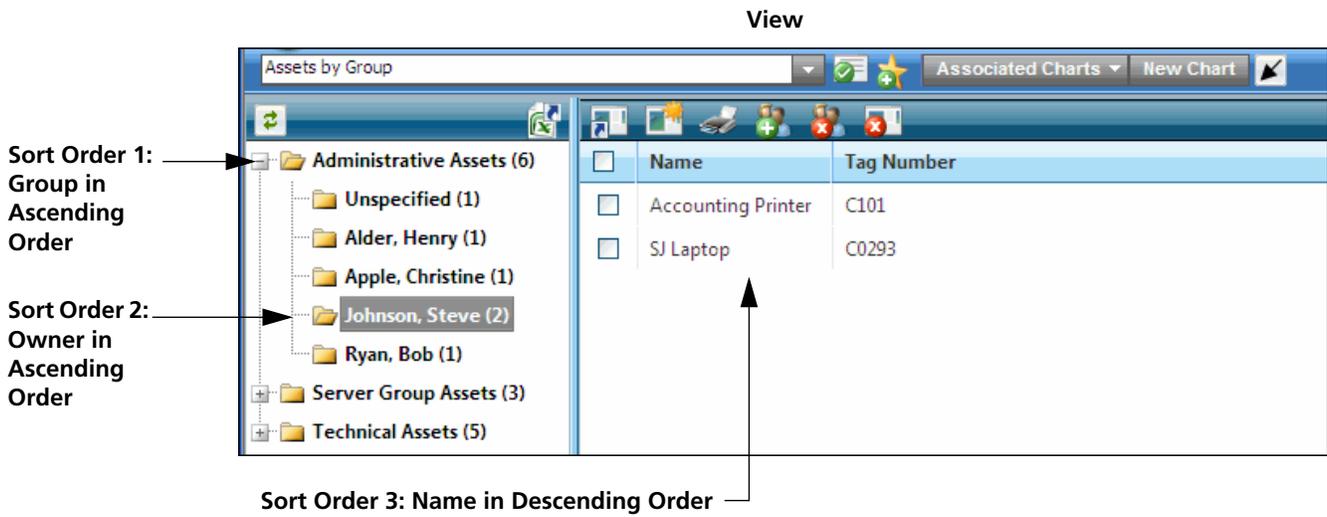
Setting the Sort Order and Direction

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.



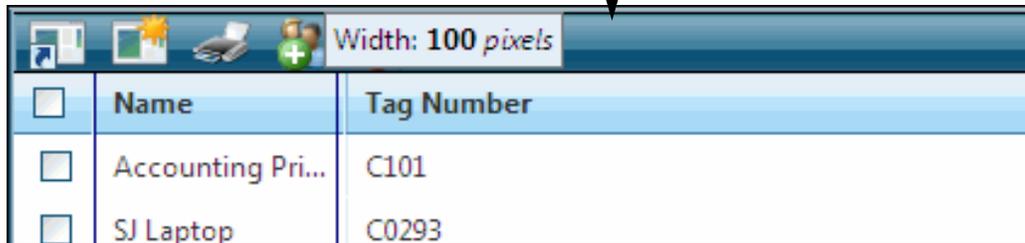
Settings in View Designer

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



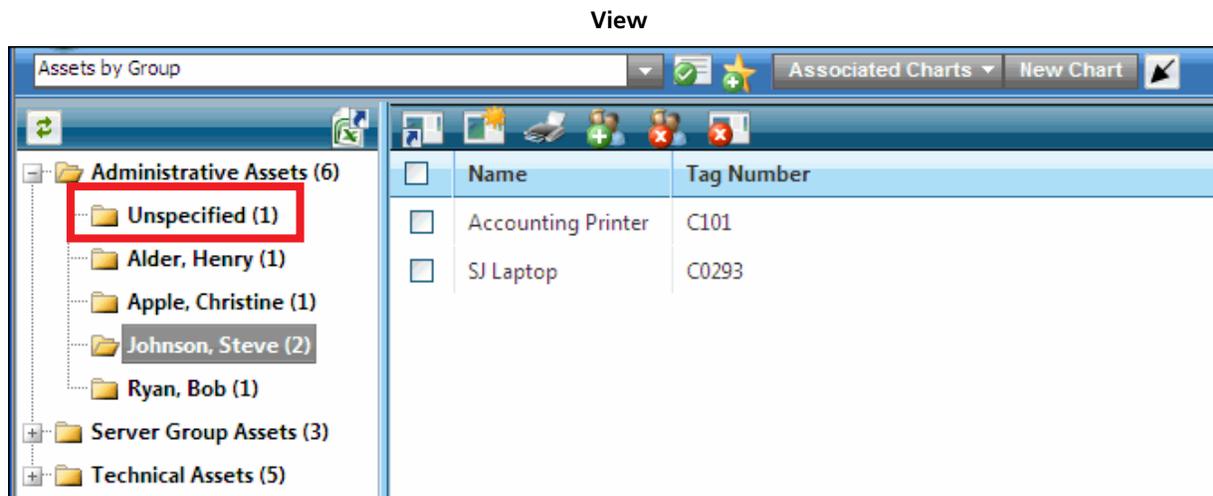
A screenshot of a software interface showing a table with two columns: 'Name' and 'Tag Number'. The 'Name' column contains three rows: 'Accounting Pri...', 'SJ Laptop', and 'C0293'. A tooltip is visible above the 'Name' column header, displaying the text 'Width: 100 pixels'. An arrow points from the text above to the tooltip.

Settings in View Designer

Column Heading	Filter	Folder Level	Column Display Order ^	Sort Order	Sort Direction	Column Width (px)
<input type="text" value="Owner Name"/> ⓘ	Add	2 ▾	Hidden ▾	2 ▾	Ascending ▾	100
<input type="text" value="Group Name"/> ⓘ	Add	1 ▾	Hidden ▾	1 ▾	Ascending ▾	100
<input type="text" value="Name"/> ⓘ	Add	None ▾	1 ▾	3 ▾	Ascending ▾	100
<input type="text" value="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.



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

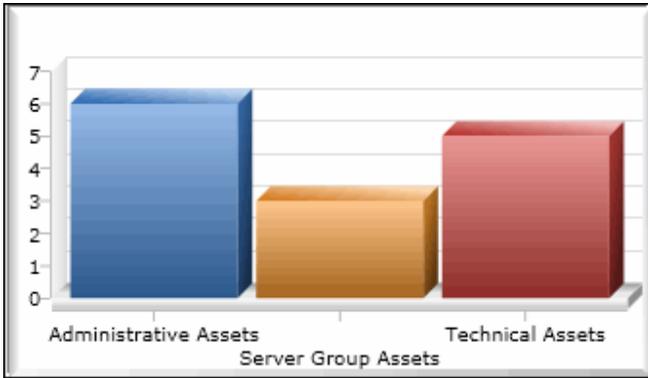
Using the Chart Designer

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.

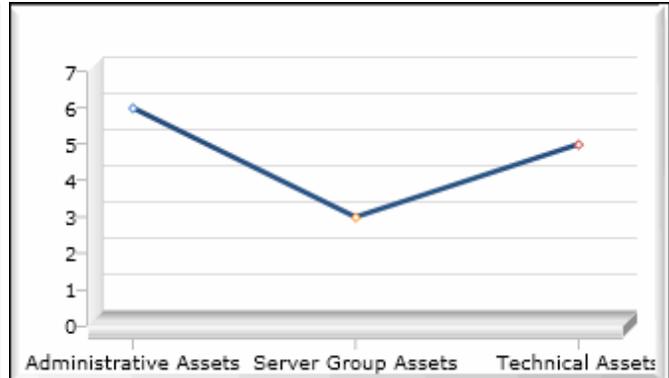
Display Types

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

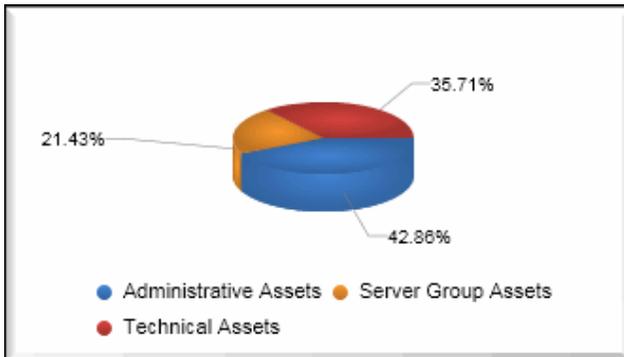
Bar Chart



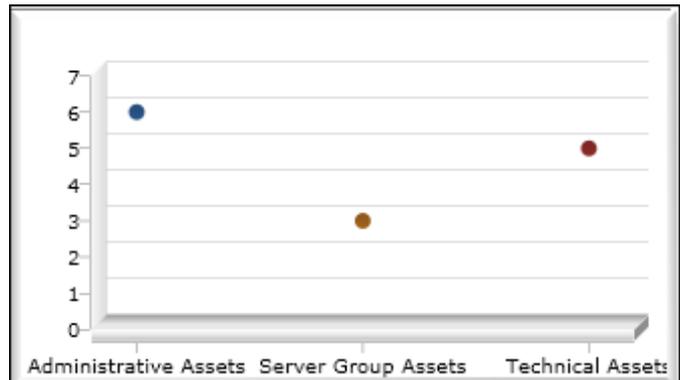
Line Chart



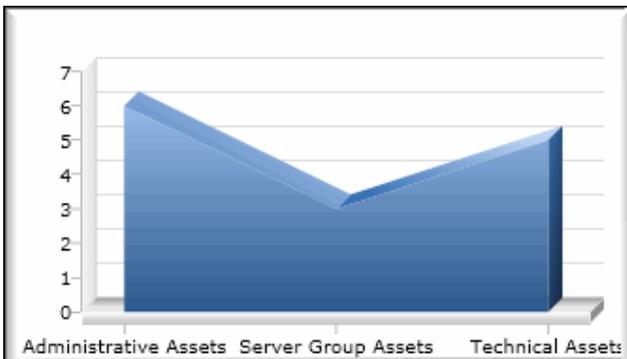
Pie Chart



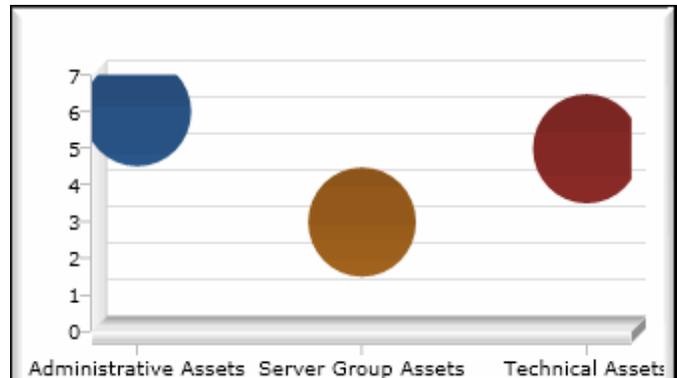
Point Chart



Area Chart

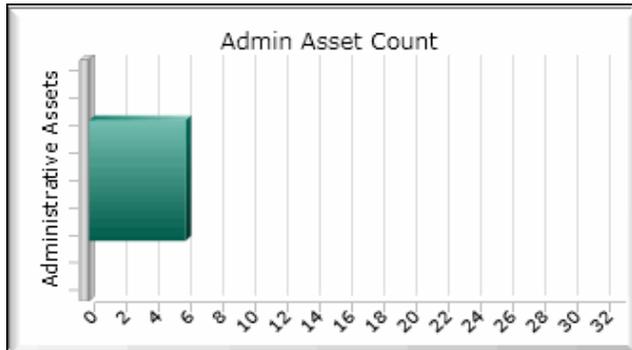


Bubble Chart



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

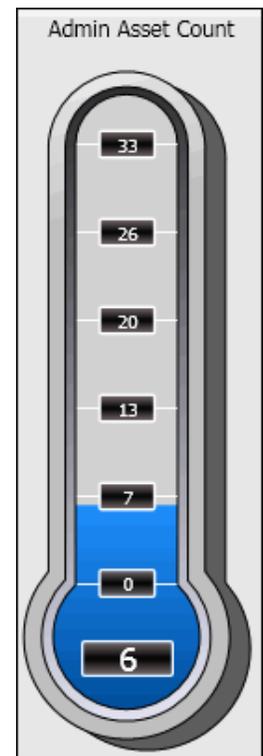
Horizontal Gauge



Vertical Gauge



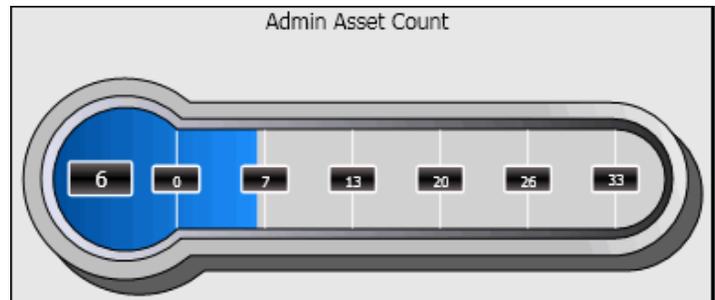
Vertical Thermometer



Full Gauge



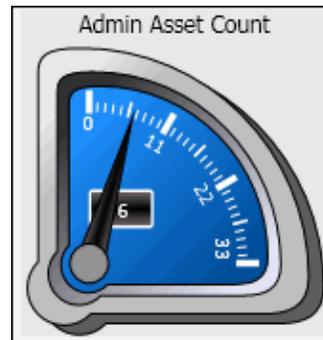
Horizontal Thermometer



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 groups).

Step 1: Select a Starting View or Chart:

View: Edit

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

Step 2: Select a Value to Chart:

- Name
- Owner Name
- Tag Number
- Group Name**

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 (for example, the number of assets in a group), 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

Admin Asset Count



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	Select: <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 (for example, the number of assets in a group) 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. See "Display Types" on page 47 for examples of each.
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

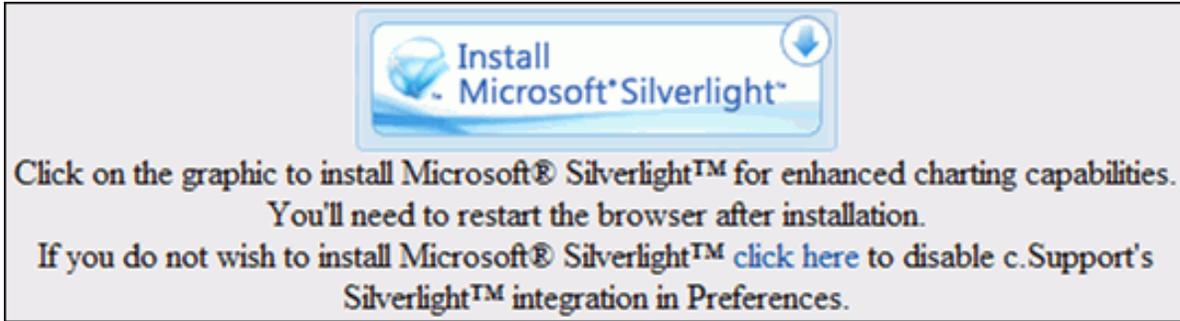
Only Include the First Group Name Values Based Upon Total Assets: Yes No

Number of Values:

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

You can utilize Microsoft® Silverlight™ for enhanced charting capabilities; use of Silverlight charts is enabled/disabled via the Use Silverlight Charts field on the Functionality tab in Global Configuration. If enabled, a Use 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 Use Silverlight Charts fields are enabled but the Microsoft Silverlight client is not installed.



Install Microsoft Silverlight

Click on the graphic to install Microsoft® Silverlight™ for enhanced charting capabilities. You'll need to restart the browser after installation. If you do not wish to install Microsoft® Silverlight™ click here to disable c.Support's Silverlight™ integration in Preferences.

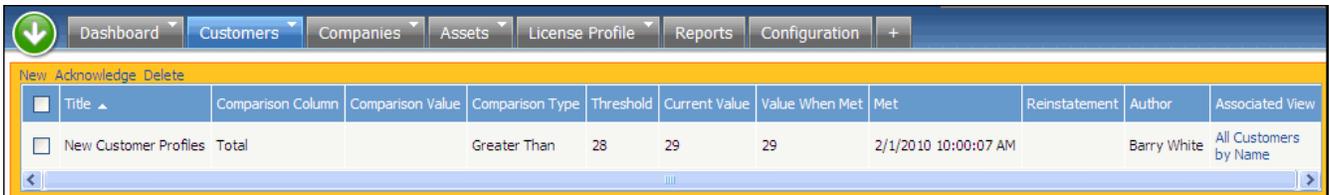


Depending on your gauge limit, iSupport Asset will attempt to spread that value over the range of gauge tick marks, in whole integer values. Some values may not display well as they are calculated across the gauge face. For example, a quarter gauge with a limit of 5 has the value 2 displayed twice on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

When displaying a gauge 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 gauge.

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.

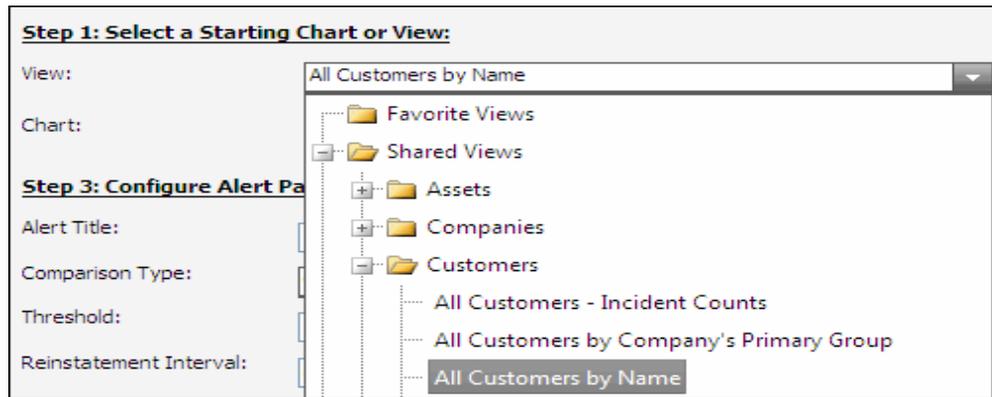


<input type="checkbox"/>	Title	Comparison Column	Comparison Value	Comparison Type	Threshold	Current Value	Value When Met	Met	Reinstatement	Author	Associated View
<input type="checkbox"/>	New Customer Profiles	Total		Greater Than	28	29	29	2/1/2010 10:00:07 AM		Barry White	All Customers by Name

Alert criteria is evaluated based on the schedule of the Alert agent; see [page 176](#) for more information.

To configure an alert, click the Alerts link in the function 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.



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 Alert Parameters section to specify the title, criteria, and notification options.

Step 3: Configure Alert Parameters:

Alert Title:

Comparison Type:

Threshold:

Reinstatement Interval: Hr(s) Min(s)

Current Value: 31 Incidents

Alert via Desktop Tab: Yes No

Alert via Email: Yes No

Email Custom Notification:

Alert via Pager: Yes No

Pager Custom Notification:

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 Reinstatement link in the alert display frame.
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.
Email Custom Notification	Select a custom notification created via the Alert Custom Notifications link under 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.

Field	Description
Pager Custom Notification	To customize the standard notification, first create a custom notification via the Alert Custom Notifications link under Notifications in the Configuration module. Then select the custom notification in this field.
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

Acknowledged |
 Awaiting Tab Acknowledgment |
 Not Met
 The underlying view has changed. Edit alert to correct.

Be sure to schedule the Alert agent after you configure an alert; see [page 176](#) 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:

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

To acknowledge an alert, select it and click the **Acknowledge** link. The alert appears 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	29	29	2/1/2010 10:00:07 AM	2/1/2010 10:26:39 AM	Barry White	All Customers by Name

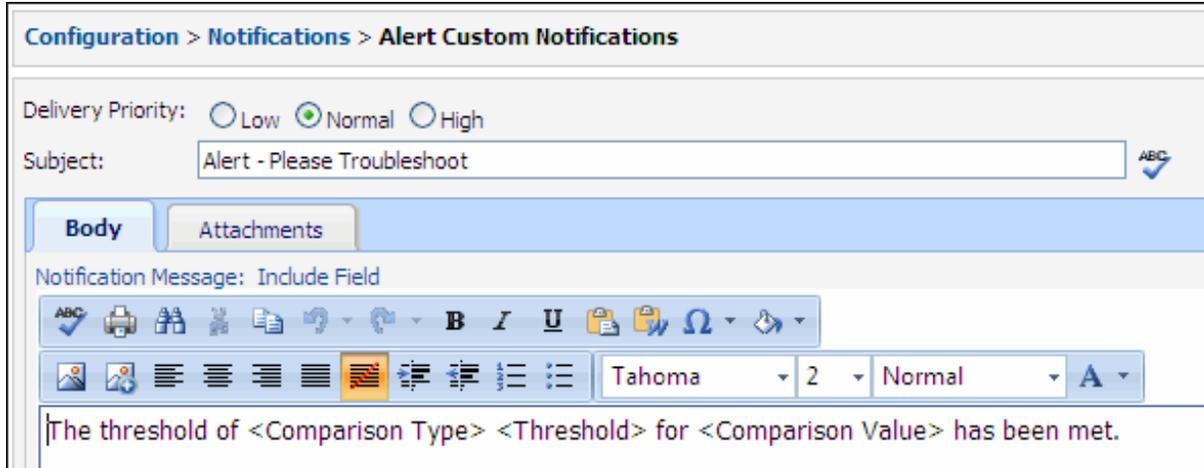
Acknowledged |
 Awaiting Tab Acknowledgment |
 Not Met
 The underlying view has changed. Edit alert to correct.

You can click the **Reinstate** 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.

Customizing Notifications for Alerts

Email notifications include standard system messages, which are listed in “Appendix I: Standard System Messages for Notifications” on page 867. To customize a notification, first create a custom notification via the Alert Custom Notifications link under Notifications in the Configuration module.



The screenshot shows the 'Alert Custom Notifications' configuration page. At the top, the breadcrumb path is 'Configuration > Notifications > Alert Custom Notifications'. Below this, there are three radio buttons for 'Delivery Priority': 'Low', 'Normal' (which is selected), and 'High'. A 'Subject' text box contains the text 'Alert - Please Troubleshoot'. Below the subject box are two tabs: 'Body' (selected) and 'Attachments'. Under the 'Body' tab, there is a 'Notification Message: Include Field' section with a rich text editor toolbar. The toolbar includes icons for undo, redo, print, insert link, unlink, bold, italic, underline, insert image, insert video, insert audio, insert table, and insert code. Below the toolbar, there are dropdown menus for font face (Tahoma), font size (2), and font weight (Normal). The text area contains the message: 'The threshold of <Comparison Type> <Threshold> for <Comparison Value> has been met.'

Field	Description
Delivery Priority	Select the priority level to assign to the email: <ul style="list-style-type: none">■ High■ Normal■ Low

Field	Description
Subject Notification Message	<p>In the Subject field, enter the subject line for the email notification.</p> <p>On the Body tab, enter the body of the email notification. You can click the Notification Message link to display a larger window for entry.</p> <p>In both fields, you can use the Include Field link to add values from the alert. Place the cursor where the data is to be inserted and click the Include Field link. The following dialog appears; select the field to insert.</p> <div data-bbox="727 470 1183 905" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Select Field to Include</p> <p>Current Date</p> <p>Alert</p> <p>Comparison Column</p> <p>Comparison Entity</p> <p>Comparison Type</p> <p>Comparison Value</p> <p>Threshold</p> <p>Value When Met</p> </div> <p>When the event occurs, the selected field data will be inserted into the email.</p>
Attachments	Use the Attachments tab to attach a specific file to be sent with the notification.

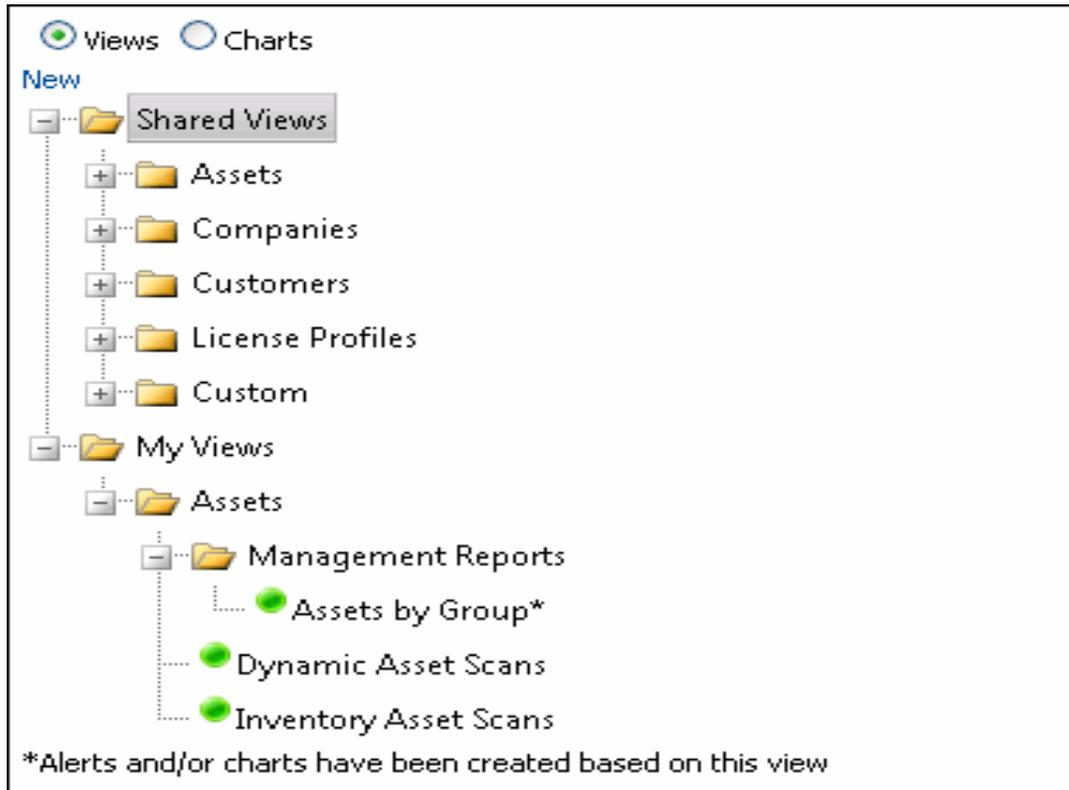
After creating the custom notification, you can select it for an alert in the Email Custom Notification and Pager Custom Notification fields in the Alert screen.

The screenshot shows a configuration window for an alert. It contains the following elements:

- Alert via Email:** A radio button group with Yes and No.
- Email Custom Notification:** A dropdown menu with "None" selected.
- Alert via Pager:** A radio button group with Yes and No.
- Pager Custom Notification:** A dropdown menu with "Alert - Please Troubleshoot" selected.

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.



<input type="checkbox"/>	Asset Type	Name	Owners	Model	Manufacturer	Location	Purchased	Tag Number
<input type="checkbox"/>	Printer	Accounting Pr...	1	HP1033	HP	Headquarters	6/1/2007	C101
<input type="checkbox"/>	IBM Thinkpad	SJ Laptop	1	Thinkpad	IBM	Headquarters	6/1/2007	C0293
<input type="checkbox"/>	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

Using Options on the Function Bar

Specifying Availability

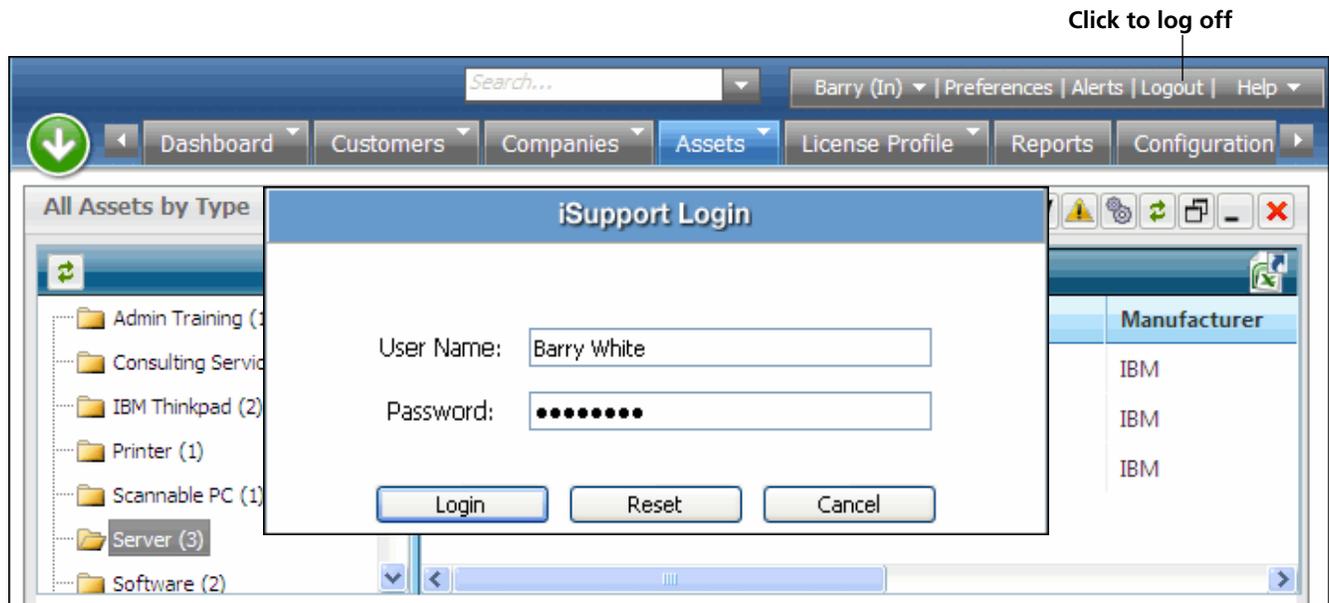
The first name in your login user name appears in the function bar in the upper right corner of the Desktop; click the dropdown to check in and out.

Click to check in and out

Asset Type	Name	Owners	Model	Manufacturer	Location
Printer	Accounting Pr...	1	HP1033	HP	Headquarters
IBM Thinkpad	SJ Laptop	1	Thinkpad	IBM	Headquarters

Logging In and Out

Use the **Logout** link on the function 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.)



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.

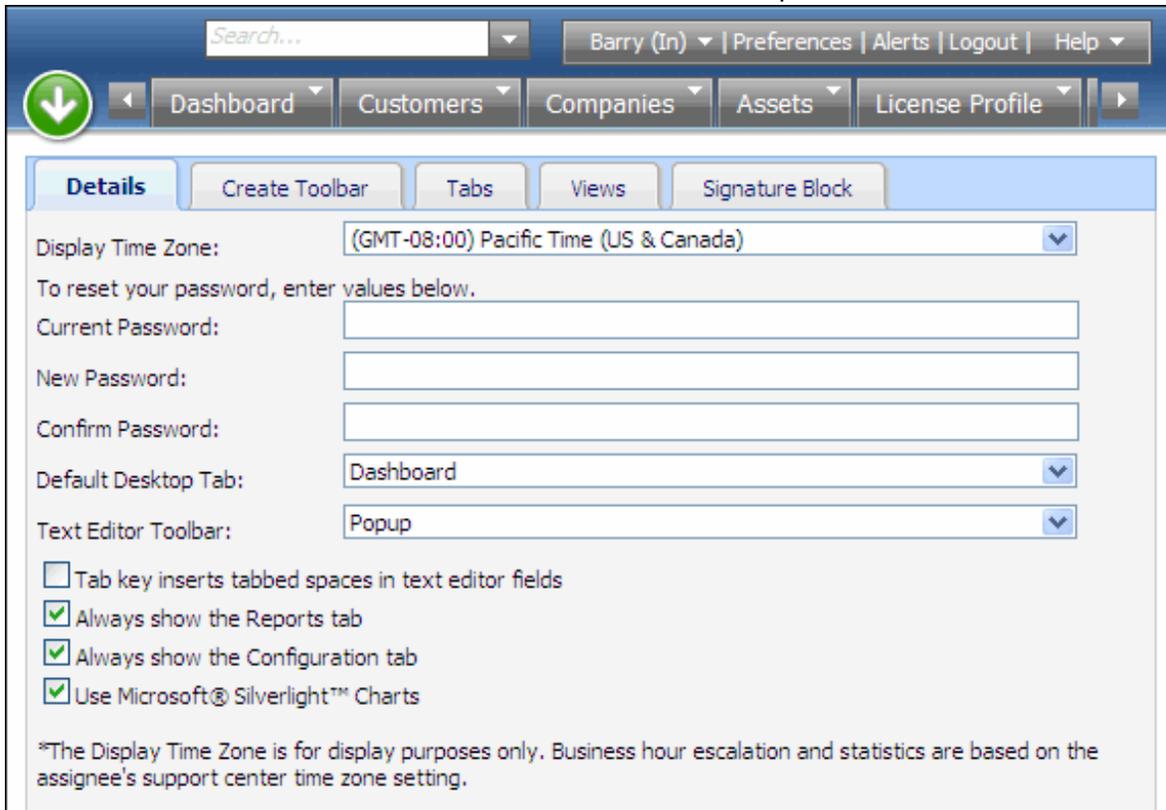


The Password field in the Login dialog is case sensitive.

Setting Preferences for the Desktop

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

Click to display the Preferences screen



The screenshot shows the iSupport Asset Desktop interface. At the top, there is a search bar and a user menu for Barry (In) with links for Preferences, Alerts, Logout, and Help. Below this is a 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)'. Below it is a note: 'To reset your password, enter values below.'
- Current Password:** An empty text input field.
- New Password:** An empty text input field.
- Confirm Password:** An empty text input field.
- Default Desktop Tab:** A dropdown menu set to 'Dashboard'.
- Text Editor Toolbar:** A dropdown menu set to 'Popup'.
- Four checkboxes:
 - 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.'

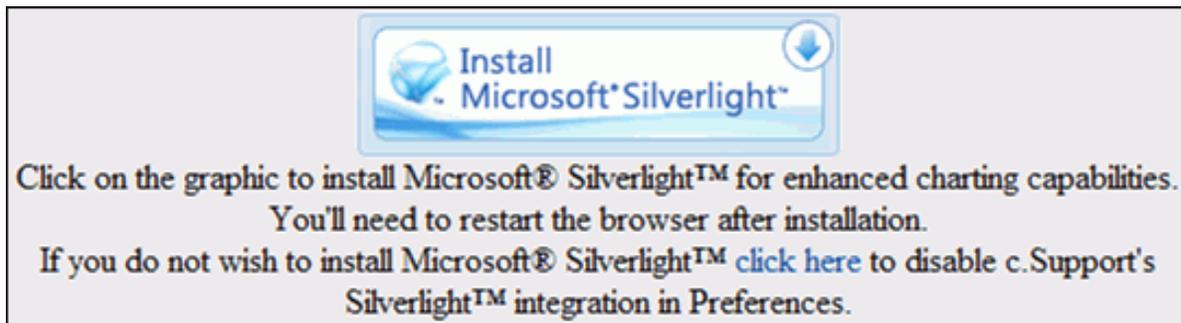
Setting Your Display Time Zone, Password, and Other Desktop Options

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; see [“Managing Tabs for Support Representatives”](#) on page 115 for more information.
- 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.

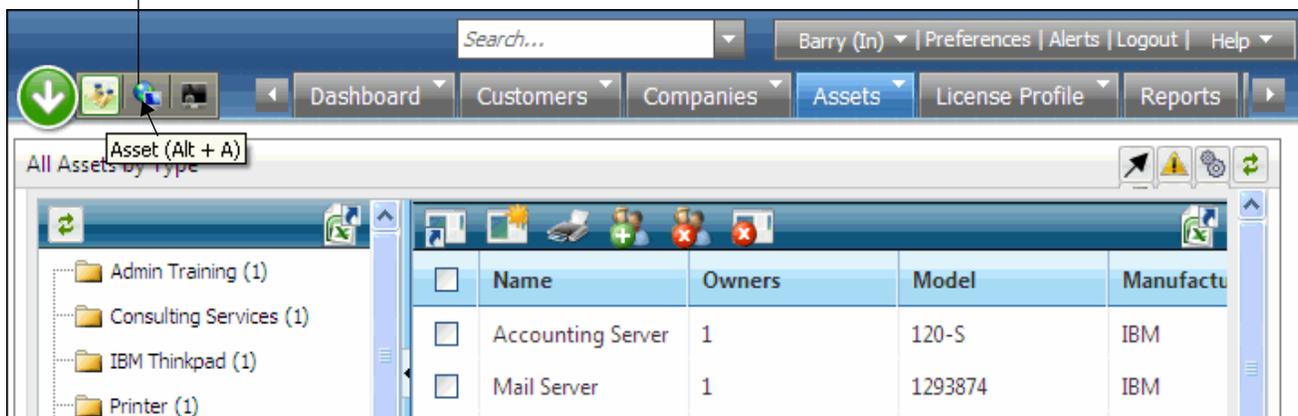
- Select the **Tab Key Inserts Tabbed Spaces in Text Editor Fields** checkbox to enable the Tab key to insert spaces (instead of moving between fields) in fields with a text editor toolbar (such as the Issue Description and Issue Resolution fields). See [“Using the Text Editor Toolbar” on page 16](#) for more information.
- 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 Microsoft 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:



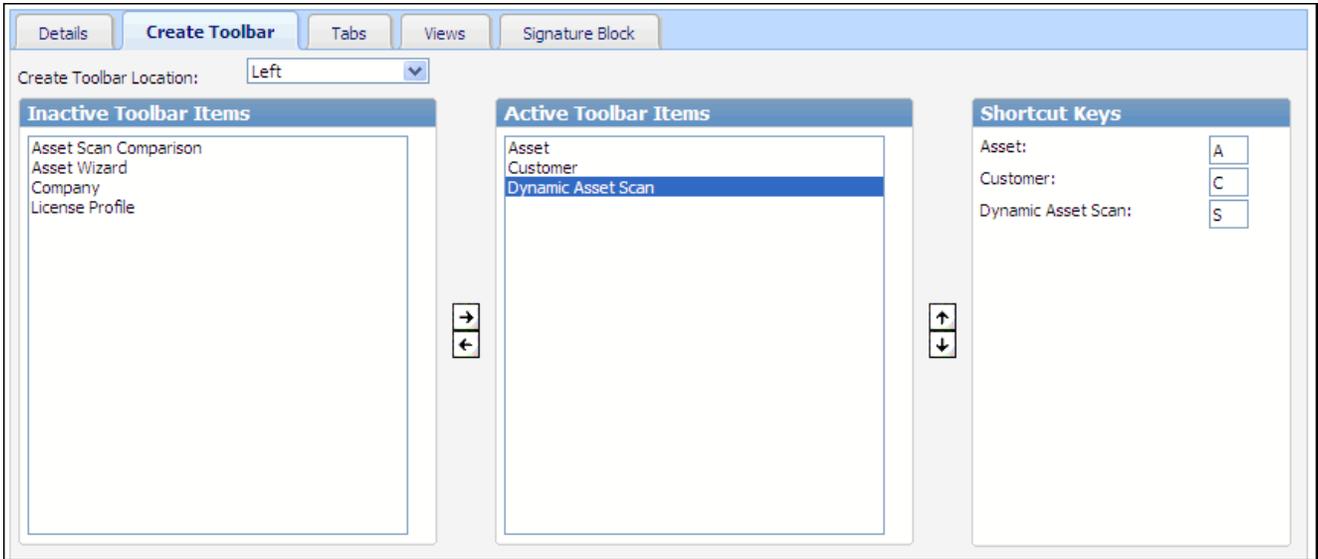
Configuring a Create Toolbar

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.

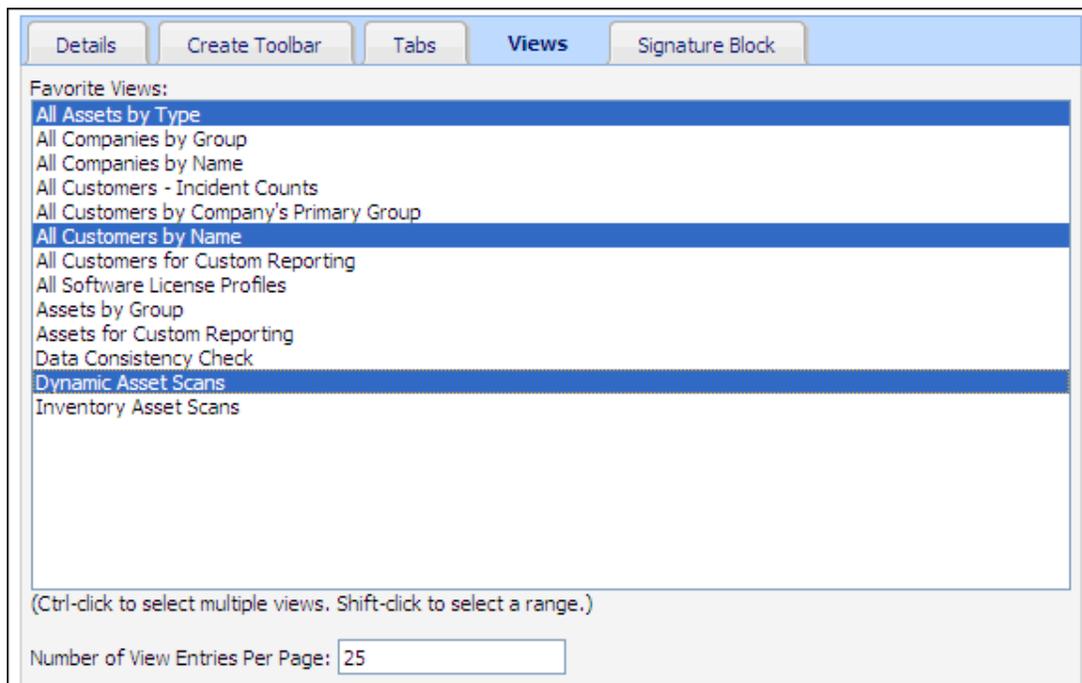


Designating Your Favorite Views

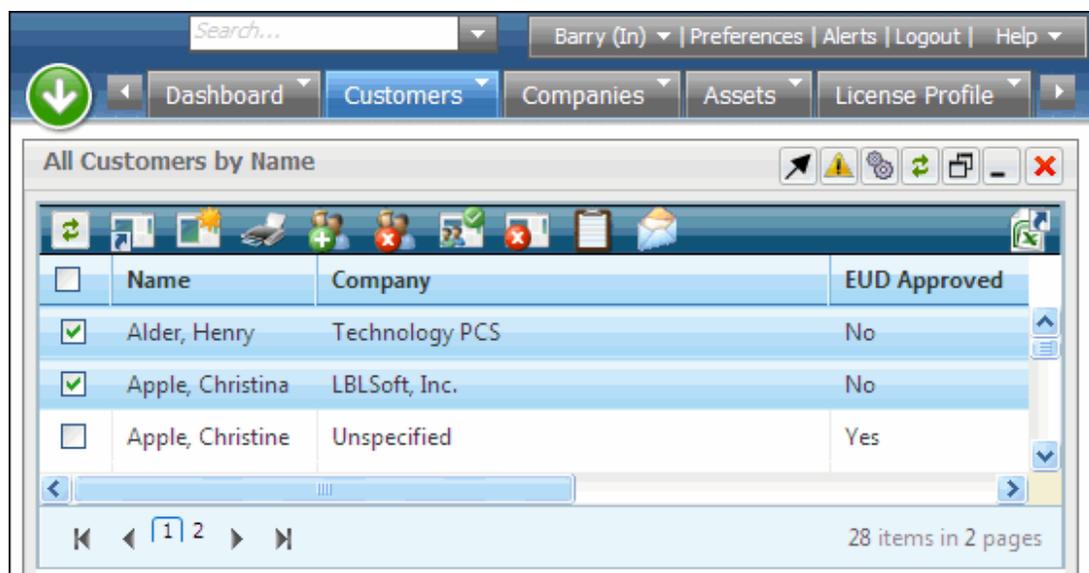
Use the Views tab in the Preferences screen to:

- 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

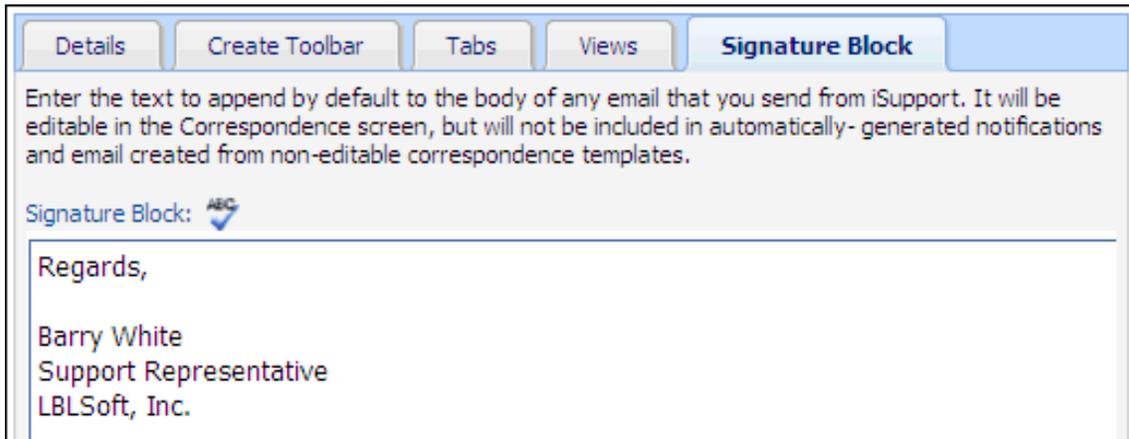
You can use the following keyboard shortcuts for paged views on the Desktop:

- 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.

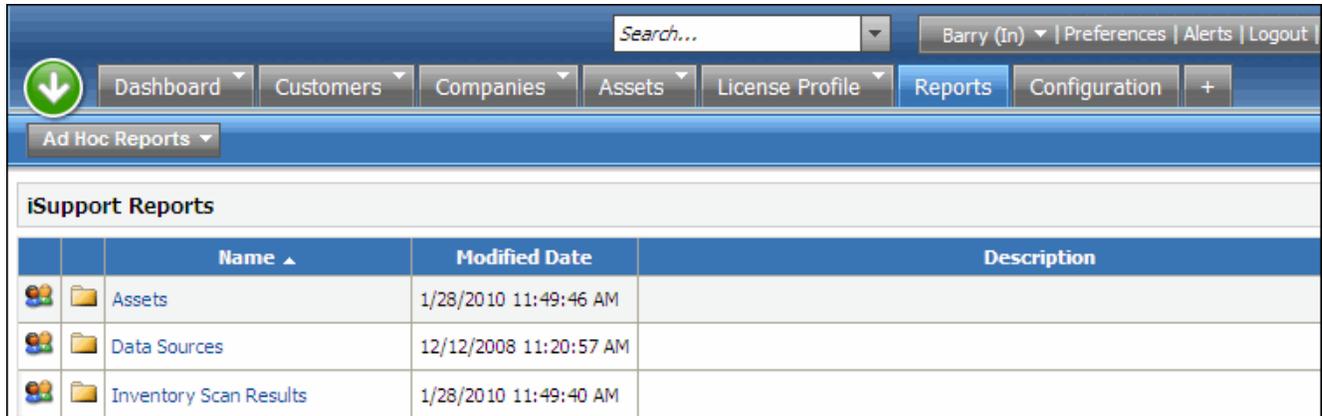


The text editor toolbar appears when you place your cursor in the field or click the Signature Block link to display a larger window. See [“Using the Text Editor Toolbar” on page 16](#) for more information.

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 an entry 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

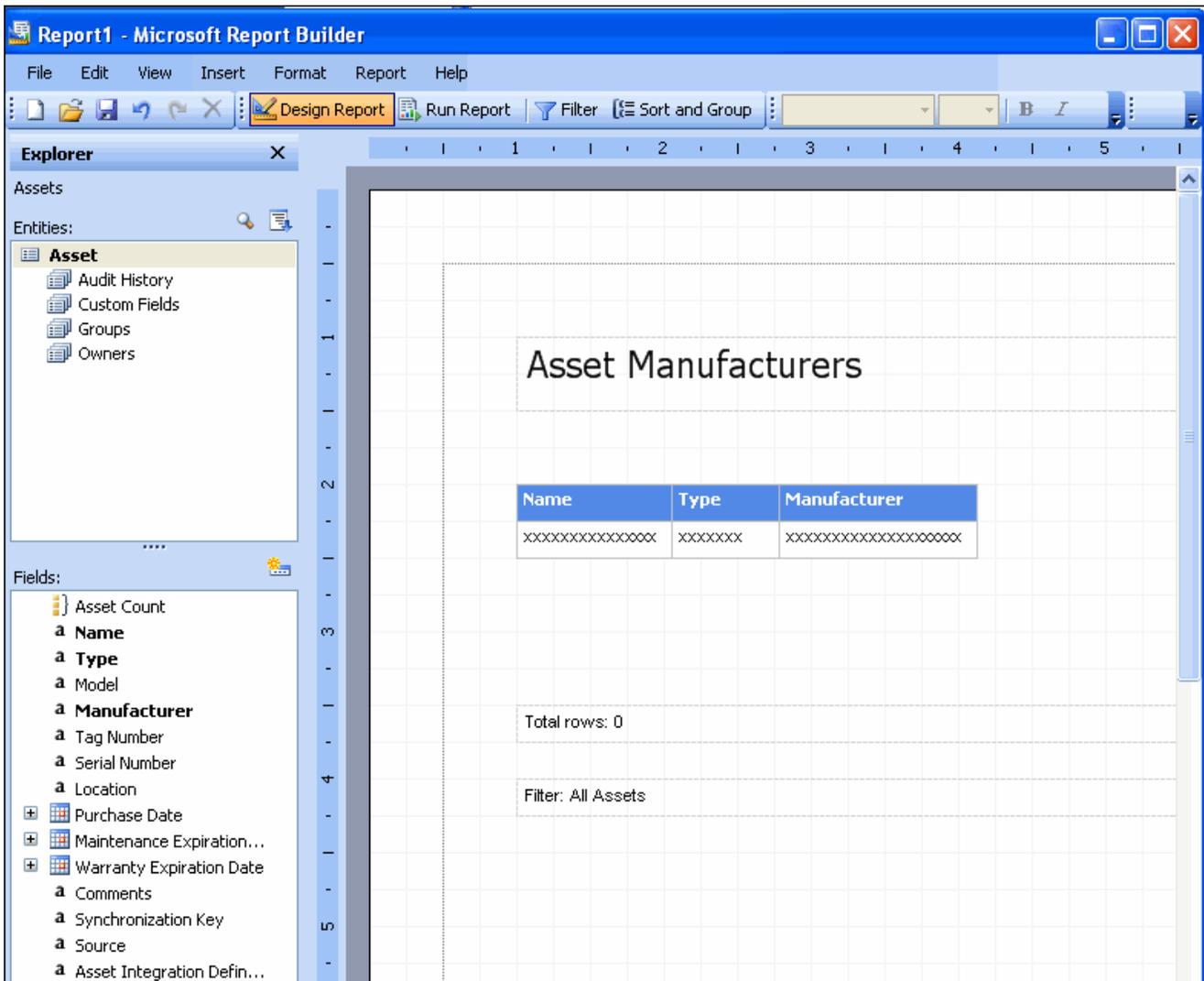
If Report Viewer permission is enabled in your Support Representative Profile record in iSupport Asset, you can view SQL reports on the Desktop via the Reports tab or a Report Viewer frame on the Desktop. You can retain the Reports tab on your Desktop via an option in the Preferences screen.



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.

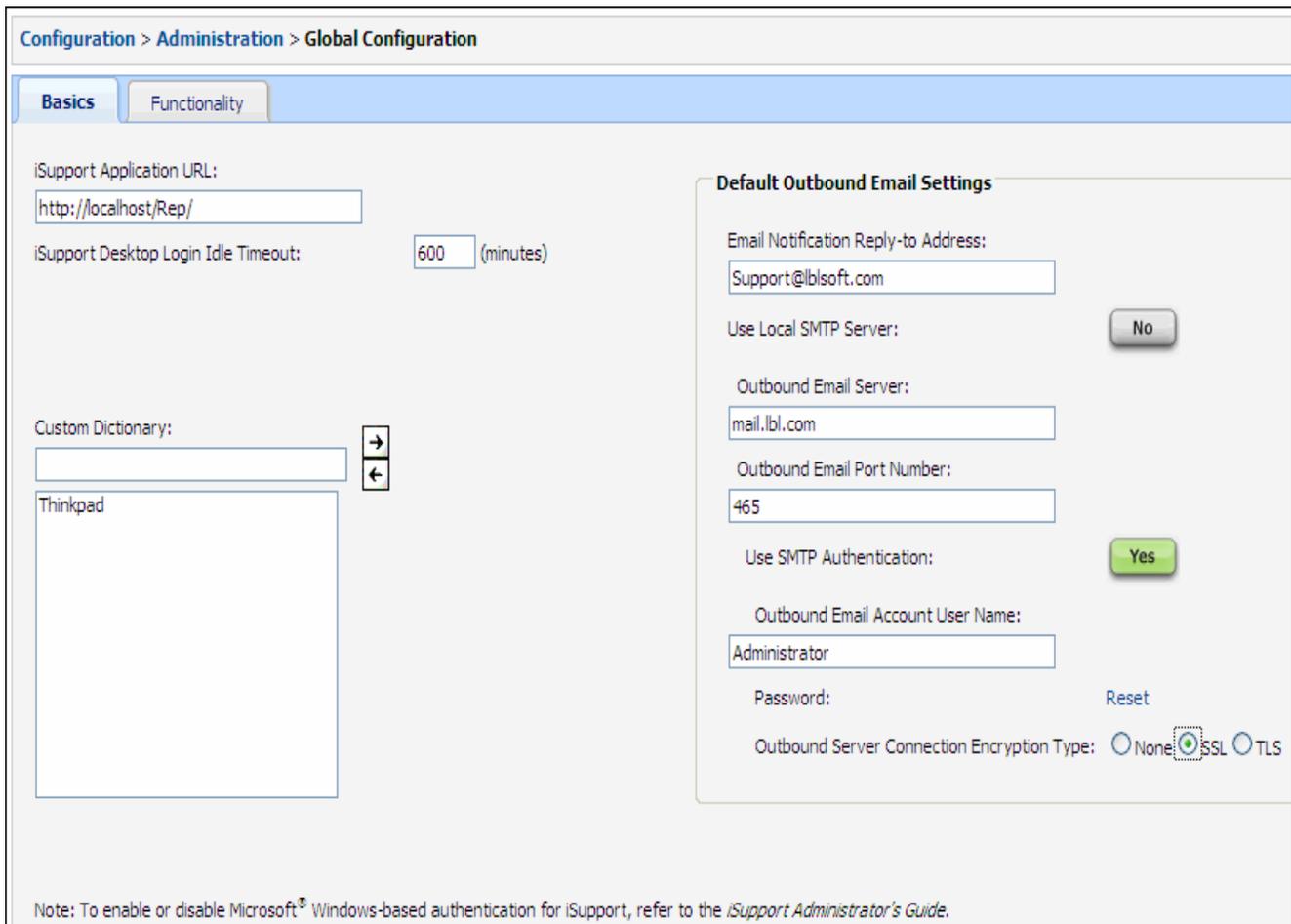
iSupport Asset includes several report models for iSupport Asset database fields, tables, and relationships. These models can be used to create ad hoc reports via Microsoft Report Builder or custom reports via Microsoft Report Designer. If you have iSupport Asset's Ad Hoc Reports permission, you can 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 Setting Global Configuration Options

Use the Global Configuration screen to enable functionality and set options that affect the entire application. To access the Global Configuration screen, select Administration | Global Configuration on the Configuration menu. Use the Basics tab to specify system-wide settings.

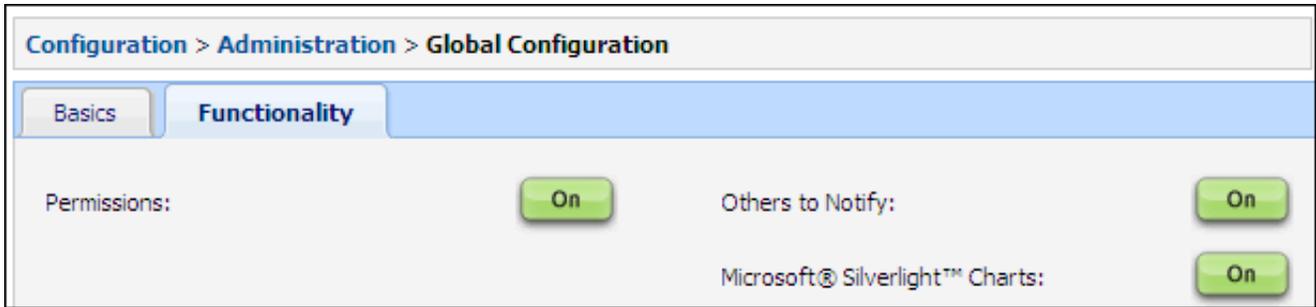


Field	Description
iSupport Application URL	Enter the URL for the installation location of iSupport Asset in the following format: http://<server>/<virtual directory in which Desktop is installed>/ This field also exists in the iSupport Asset Configuration Wizard.

Field	Description
Desktop Login Idle Timeout	<p>Enter the number of minutes the computer can be idle before iSupport Asset access will be disabled. After the computer is idle for the specified number of minutes, an iSupport Asset Login prompt will display when a support representative initiates an action in the iSupport Asset application.</p>
Custom Dictionary	<p>Enter the words to be ignored when the spell-check feature is accessed in fields throughout the iSupport Asset application. To access the spell-check feature, click the  icon or click the Check Spelling link. Note: custom dictionary functionality is case sensitive; the spell-check will stop if the capitalization does not match.</p> <ul style="list-style-type: none"> ■ To add a word to the list, enter the word in the field on the left and click the  icon to add it to the field on the right. ■ To remove a word from the list, select it in the field on the right and click the  icon.
Email Notification Reply-to Address	<p>Enter the address to be included in the Reply To field for standard iSupport Asset event notifications generated by iSupport Asset. These notifications are generated based on options selected in the Configuration module.</p> <p>You can format the email address according to the following example: support@gwi.com</p> <p>This field also exists in the iSupport Asset Configuration Wizard.</p>

Field	Description
Use Local SMTP Server Outbound Mail Server Outbound Mail Port Number	<p>Select:</p> <ul style="list-style-type: none"> ■ Yes to use the local SMTP server for standard outbound email event notifications sent by iSupport Asset. ■ No to use a server that is different from the local server on which iSupport Asset is installed for outbound mail. Then, in the Outbound Mail Server field, enter the name of the server to be used for outbound mail sent by iSupport Asset. See the next page for information on the rest of the fields that appear when you select No in the Use Local SMTP Server field. <p>The Use Local SMTP Server field also exists in the iSupport Asset Configuration Wizard.</p> <p>Regardless of your selection in this field, you'll need to set up your system to relay email. Use the following steps if you are using IIS:</p> <ol style="list-style-type: none"> 1 On the server on which the mail application is installed, select Start Programs Administrative Tools Internet Services Manager. 2 Right-click on Default SMTP Virtual Server and select Properties. On the Access tab, click the Relay button in the Relay Restrictions section. 3 Use the Relay Restrictions dialog to ensure that the server on which iSupport Asset is installed is allowed to relay email.
Use SMTP Authentication Outbound Email Account User Name Password Outbound Server Uses SSL Connection	<p>The Use SMTP Authentication field appears if No is selected in the Use Local SMTP Server field (you'll be using a server that is different than the local server on which iSupport Asset is installed for outbound email). Select Yes if you need to pass a user name and password to the outbound mail server.</p> <p>In the Outbound Email Account User Name and Password fields, enter the login to authenticate against the server for accessing the outbound email account.</p> <p>In the Outbound Server Connection Encryption Type field, if the server used for outbound email has an authentication certificate for secure communication, select the type: Transport Layer Security (TLS) or Secure Socket Layer (SSL). The default in the Outbound Mail Port Number field will change depending on your selection; verify that the number is correct and change it if necessary.</p>

Use the Functionality tab to enable or disable functionality throughout the application.



Field	Description
Permissions	Select Yes to use iSupport’s Permission security feature. To set permissions for groups of support representatives, see “Assigning Group Permissions” on page 82. To set permissions individually for support representatives, see “Assigning Permissions to Support Representatives” on page 101.
Others to Notify	<p>Select On to enable Others to Notify lists to be set up for sending event notifications and correspondence.</p> <p>You can set up an Others to Notify list for an individual customer or all customers in a company.</p>
Microsoft® Silverlight™ Charts	<p>Select On to enable Microsoft® Silverlight™ functionality for enhanced charting capabilities. 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 Use Microsoft® Silverlight™ Charts fields are enabled but the Microsoft® Silverlight™ client is not installed:</p> <div data-bbox="532 1230 1425 1549" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  <p>Click on the graphic to install Microsoft® Silverlight™ for enhanced charting capabilities. You'll need to restart the browser after installation.</p> <p>If you do not wish to install Microsoft® Silverlight™ click here to disable c.Support's Silverlight™ integration in Preferences.</p> </div>

4 Setting Up Support Representatives and Customer Groups

Overview

Depending on the size of your organization, you can use the following features for setting up support representatives in different functional or geographic areas:

- You can optionally use the Support Center screen to set up support centers with specified time zones. For support representatives assigned to a support center, the support center's time zone will be used.
- You can optionally use the Location screen to set up locations for location-based routing. You can also use the Location screen to set the display time zone for multiple support representatives.
- Use the Group screen to set up:
 - Support representative groups for reporting and permissions. The Administrators group and the Support group are included by default in iSupport Asset. You can associate asset groups with support representative groups for restricting access to assets.
 - Customer groups for reporting and asset assignment.
- Use the Support Representative screen to set up every person in your organization that will be using iSupport Asset. These settings are used in all types of iSupport Asset functionality.

You can also set up permissions to allow or disallow certain types of access to iSupport Asset functionality.

The Setup Process

- The iSupport Asset Configuration Wizard appears when the Desktop is initially accessed by the System Administrator profile. It includes options for creating groups, creating support representative profiles, and assigning support representatives to groups.
- If you wish to use support centers for assigning support representatives to different areas within a single iSupport Asset installation, create support centers. See ["Setting Up Support Centers"](#) on page 77.
- Create groups for support representatives and customers. See ["Setting Up Support Representative Groups"](#) on page 81.

- Use the Support Representative screen to set up all persons using iSupport Asset. See [“Setting Up Support Representatives” on page 97](#).
- If applicable, use the Group or Support Representative screen to set up security for support representatives. See [“Assigning Group Permissions” on page 82](#) or [“Assigning Permissions to Support Representatives” on page 101](#).
- If applicable, create **customer groups** for sending correspondence and reporting via the Desktop. See [“Creating Customer Groups” on page 117](#).

Setting Up Support Centers

You can use support centers for assigning support representatives to different areas within a single iSupport Asset installation. For example, you could set up support centers for geographic areas such as West Coast and East Coast, or for functional areas such as external and internal support. A Time Zone field will be available so that you can set up a support center with a time zone.

A support representative can be assigned to only one support center. If you choose not to use the Support Center feature, business hour statistics and service level agreement calculations will use the time zone settings of the server hosting iSupport Asset. To access the Support Center entry screen, select Support Representatives | Support Centers on the Configuration menu. Then click Create.

Field	Description
Support Center Name	Enter the name of the support center.
This is the Default Support Center	Select this checkbox to use the selected support center as default when you create Support Representative records.
Time Zone	Select the time zone for the support center. For all support representatives assigned to this support center, this time zone will be used for business hour statistics and service level agreement calculations.

Field	Description
Nonmembers/ Members	<p data-bbox="488 201 1458 268">Use these fields to assign support representatives to a support center. A support representative can be assigned to only one support center.</p> <p data-bbox="488 279 1430 346">The Nonmembers field includes support representatives set up in the Support Representative screen.</p> <ul data-bbox="488 369 1458 604" style="list-style-type: none"><li data-bbox="488 369 1458 478">■ To assign a support representative to the support center, select the support representative in the Nonmembers field and click the  icon.<li data-bbox="488 506 1458 604">■ To remove a support representative from the support center, select the support representative in the Members field and click the  icon.

Setting Up Locations

Locations are used to assign a display time zone for multiple support representatives at one time. iSupport Asset's Location functionality is an optional feature.

To access the Location entry screen, select Support Representatives | Locations on the Configuration menu.

Configuration > Support Representatives > Locations

Location Name:

Display Time Zone:

Non Members

- Abby Kienle
- Barry White
- Dwayne March
- Gena Pirie
- Jack Sullivan
- Jorge Quentin
- Kelsey Stout
- System Administrator
- Tess French

→

←

Members

- Connor Flynn
- Mary Smith
- Stuart Copeland

Apply the selected display time zone to members of this location upon save

*The Display Time Zone is for display purposes only. Incident business hour escalation and statistics are based on the assignee's support center time zone setting.

Field	Description
Location Name	Enter the name of the location. This name will appear for selection in the location-based routing dialogs.
Display Time Zone	Select the time zone to use for date/time stamps that will display for those in the Members field. This is for display purposes only on the Desktop client.

Field	Description
Nonmembers/ Members	<p>The Nonmembers field includes support representatives set up in the Support Representative screen.</p> <ul style="list-style-type: none"> ■ To assign a support representative to the location, select the support representative in the Nonmembers field and click the  icon. ■ To remove a support representative from the location, select the support representative in the Members field and click the  icon.
Apply the Selected Display Time Zone to Members of This Location Upon Save	<p>Use this checkbox to assign the selected display time zone to those in Members field. This will update the display time zone in each member's Support Representative record.</p>

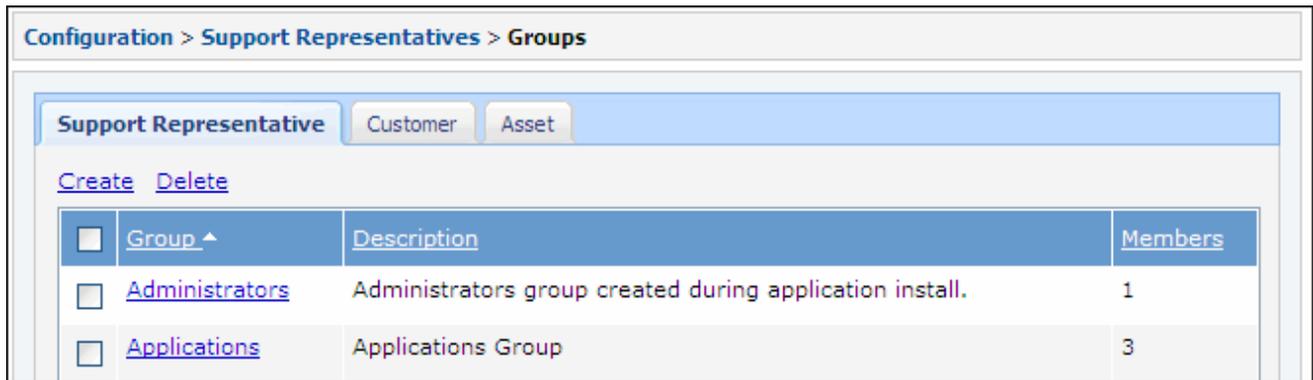


Only one location can be assigned to a support representative.

Setting Up Support Representative Groups

The Administrators group and the Support group are included by default in iSupport Asset. (The iSupport Asset Configuration Wizard appears when the Desktop is initially accessed by the System Administrator profile; it includes options for creating groups, creating support representative profiles, and assigning support representatives to groups.) Those assigned to the Administrators group via the wizard will have access to configuration options. You can use support representative groups to restrict access to assets; use the Group Access tab in the applicable screen to assign the support representative groups that can access the record.

To access the Group entry screen, select Support Representatives | Groups on the Configuration menu. Then click the Create link. For information on creating a customer group, see “[Creating Customer Groups](#)” on page 117.



On the Details tab, enter a name and description of the group to display in the Group view in the Configuration database.

The screenshot shows a web interface for configuring support representatives. The breadcrumb trail is 'Configuration > Support Representatives > Groups'. There are three tabs: 'Details' (selected), 'Permissions', and 'Membership'. Under the 'Details' tab, there is a 'Group Name' input field with the text 'Applications' and a 'Description' input field with a small 'ABC' icon and a checkmark. The description text is 'Representatives supporting all applications used by the Administration department'.

Field	Description
Group Name	Enter the name of the group. This name will appear for selection in views.
Description	Enter a description of the group. This description will display in the Group view in the Configuration database.

Assigning Group Permissions

If Permissions are enabled in the Global Configuration screen, you can use the Permissions tab to allow or disallow certain types of access to iSupport Asset functionality. You can assign permissions to support representatives in groups in the Group screen or to support representatives individually in the Support Representative screen. Support representatives must refresh their browsers in order for permissions to take effect.

When you select an option on the left on the Permissions tab, the applicable fields will display. Use the Select All link to select all permissions, or the Clear All link to deselect all permissions.

With the Reader permissions, functionality will only be allowed for selected permissions. With Author and Editor permissions, if a permission is *not* selected, the function will not display for the support representative.

Assigning Asset Permissions

On the Permissions tab, select Assets to allow or disallow access to asset functions such as creating, viewing, updating fields, and scanning. You can select Apply All Selected Module Permissions at the bottom of the screen to assign the permissions that you selected to support representatives with the group designated as their primary group.

The screenshot shows the 'Permissions' tab for a group. On the left, a tree view shows 'iSupport Permissions' expanded to 'Assets'. The main area lists three roles with their respective permissions:

- Reader** (checked): View Asset, View Scan/Comparison
- Author** (checked): Create New Asset, Use Multiple Asset Wizard, Create Scan/Comparison
- Editor** (checked): Edit Asset, Delete Asset, Delete Scan/Comparison

Buttons for 'Select All Asset Permissions' and 'Clear All Asset Permissions' are on the right. At the bottom, a checkbox is labeled 'Apply all selected module permissions to all primary members of this group upon save'.

Field	Description
Reader	<p>Click the Reader checkbox to select both Reader permissions, or select one or both of the following:</p> <ul style="list-style-type: none"> View Asset: Select to allow support representatives in the group to view any Asset record. If this option is <i>not</i> selected, for all members of the group, all views of Asset records will not be included on the Desktop.
	<ul style="list-style-type: none"> View Scan/Comparison: Select to allow support representatives in the group to view asset scans and scan comparisons via the Desktop.

Field	Description
Author	<p>Click the Author checkbox to select all Author permissions, or select one or all of the following:</p> <ul style="list-style-type: none"> ■ Create New Asset: Select to allow support representatives in the group to create Asset records. If this option is <i>not</i> selected, for all members of the group, the Create Asset option will not be included on the Desktop. ■ Use Multiple Asset Wizard: Select to include the Asset Creation Wizard on the Create menu on the Desktop for support representatives in the group. The Asset Creation Wizard enables automatic creation of multiple Asset records; you can enter data to populate asset fields in all records created, display prompts for entering data unique to a record, and save your settings in a profile for use later. ■ Create Scan/Comparison: Select to allow support representatives in the group to perform a scan on a computer that has Microsoft Windows® 98 and above or any other WMI (Windows® Management Instrumentation)-compliant machine over the network, and to perform a scan comparison. If this option is <i>not</i> selected and support representatives in the group have the View permission, they can view Asset records but the Scan fields will be disabled. Note: the View permission or the Create New permission is required for this permission.
Editor	<p>Click the Editor checkbox to select all Editor permissions, or select one or all of the following. Note: the View permission is required for these permissions. If a support representative has the Author Create New permission but no Editor Edit permission, the Save and Close Window menu option and icon will not be available after an Asset record is initially saved.</p> <ul style="list-style-type: none"> ■ Edit Asset: Select to allow support representatives in the group to update Asset records. If this option is <i>not</i> selected, support representatives in the group can view Asset records but the fields will be disabled. ■ Delete Asset: Select to allow the support representative to delete Asset records. If this option is <i>not</i> selected, for all members of the group, the Delete option will not be included in the Asset screen. ■ Delete Scan/Comparison: Select to allow the support representative to delete Asset records and scan comparisons. If this option is <i>not</i> selected, for all members of the group, the Delete option will not be included in the Asset screen.

Assigning Customer/Company Permissions

On the Permissions tab in the Groups screen, select Customers to allow or disallow access to customer functions such as creating, viewing, and updating fields. Company permissions are tied to these settings; if a group has permission to delete a Customer Profile record, it also has permission to delete a Company record. You can select Apply All Selected Module Permissions at the bottom of the screen to assign the permissions that you selected to support representatives with the group designated as their primary group.

The screenshot shows the 'Permissions' tab for a group. The left sidebar lists modules: iSupport Permissions, Assets, Customers (selected), Desktop Content, License Management, and Reports. The main area shows three permission roles: Reader, Author, and Editor, each with a checked checkbox. The Reader role has a dropdown menu with 'View' selected. The Author role has a dropdown menu with 'Create New' selected. The Editor role has a dropdown menu with 'Edit' and 'Delete' selected. On the right side, there are two buttons: 'Select All Customer Permissions' and 'Clear All Customer Permissions'. At the bottom, there is a checkbox labeled 'Apply all selected module permissions to all primary members of this group upon save'.

Field	Description
Reader	Click the Reader checkbox or select View to allow support representatives in the group to view any Customer Profile or Company record. If this option is <i>not</i> selected, for all members of the group, all views of Customer Profile and Company records will not be included on the Desktop.

Field	Description
Author	<p>Click the Author checkbox to select all Author permissions, or select one or more of the following.</p> <ul style="list-style-type: none"> ■ Select Create New to allow support representatives in the group to create Customer Profile and Company records. <p>If the Create New option is <i>not</i> selected, for all members of the group, the Create Customer and Create Company options will not be included on the Desktop. Only basic customer information can be entered for a new customer or company in the Select Customer dialog.</p>
Editor	<p>Click the Editor checkbox to select all Editor permissions, or select one or more of the following. Note: the View permission is required for these permission. If a support representative has the Author Create New permission but no Editor Edit permission, the Save and Close Window menu option and icon will not be available after a Customer Profile or Company Record is initially saved.</p> <ul style="list-style-type: none"> ■ Edit: Select to allow support representatives in the group to update Customer Profile and Company records. If this option is <i>not</i> selected, members of the group can view Customer Profile and Company records but the fields will be disabled. ■ Delete: Select to allow support representatives in the group to delete Customer Profile and Company records. If this option is <i>not</i> selected, for all members of the group, the Delete option will not be included in the Customer Profile and Company screens.

Assigning Desktop Content Permissions

On the Permissions tab, select Desktop Content to allow or disallow display of the tab, view, chart, and alert functionality on the Desktop. You can select Apply All Selected Module Permissions at the bottom of the screen to assign the permissions that you selected to support representatives with the group designated as their primary group.

The screenshot shows the 'Permissions' tab for a group. The left sidebar lists modules: iSupport Permissions, Assets, Customers, Desktop Content (selected), License Management, and Reports. The main area shows two roles: 'Author' and 'Editor'. The 'Author' role has a list of permissions: Create Private Tab, Create Shared Tab, Create Private View, Create Shared View, Create Custom View, Create Private Chart, Create Shared Chart, Create Private Alert, and Create Shared Alert. The 'Editor' role has a list of permissions: Edit Shared Tab, Edit Shared View, Edit Shared Chart, Edit Shared Alert, Delete Private Tab, Delete Shared Tab, Delete Private View, Delete Shared View, Delete Private Chart, Delete Shared Chart, Delete Private Alert, and Delete Shared Alert. On the right, there are links for 'Select All Desktop Content Permissions' and 'Clear All Desktop Content Permissions'. At the bottom, there is a checkbox labeled 'Apply all selected module permissions to all primary members of this group upon save'.

Field	Description
Author	<ul style="list-style-type: none"> Create Private Tab: Select Yes to enable members of the group to create tabs for display on their own Desktop. If this option is not enabled, If this option is not enabled, the Add New Tab option will be grayed out on the Add Tab menu for members of the group.

Field	Description
	<ul style="list-style-type: none"> <li data-bbox="399 201 1455 306">■ Create Shared Tab: Select to enable members of the group to create tabs that are designated as Shared (tabs that other support representatives can access via the Add Existing Tab option on the Add Tab menu). <li data-bbox="399 317 1442 390">■ Create Private View: Select to enable the View Designer to appear on the Desktop action menu for members of the group. <li data-bbox="399 401 1455 579">■ Create Shared View: This permission requires the Create Private View permission. Select this option to include the Access field in the View Designer for members of the group. Group members will be able to create private views that cannot be accessed by other representatives, as well as shared views that can be accessed by other representatives. <li data-bbox="399 590 1455 768">■ Create Custom View: This permission requires the Create Private View permission. Select this option to include the Design Custom View link in the View Designer for members of the group. The Design Custom View link enables users to access existing custom SQL queries within an iSupport Asset SQL table. <li data-bbox="399 779 1455 852">■ Create Private Chart: Select to enable the Chart Designer to appear on the Desktop action menu for members of the group. <li data-bbox="399 863 1455 1041">■ Create Shared Chart: This permission requires the Create Private Chart permission. Select this option to include the Access field in the Chart Designer for members of the group. Group members will be able to create private charts that cannot be accessed by other representatives, as well as shared charts that can be accessed by other representatives. <li data-bbox="399 1052 1455 1157">■ Create Private Alert: Select to, for members of the group, enable the Alert icon to appear in content frames, and the Alert button to appear in the View Designer and Chart Designer. <li data-bbox="399 1167 1455 1241">■ Create Shared Alert: Select to include the Send To field in the Alert creation screen for members of the group.

Field	Description
Editor	<ul style="list-style-type: none"> <li data-bbox="402 197 1463 344">■ Edit Shared Tab: Select to allow members of the group to change the content of a tab that is designated as Shared via the Sharing & Permissions option on the tab menu. Other support representatives can add tabs designated as Shared to their own Desktops. <li data-bbox="402 350 1463 464">■ Edit Shared View: Select to allow members of the group to change the content of a view that is designated as Shared via the Access field in the View Designer. <li data-bbox="402 470 1463 583">■ Edit Shared Chart: Select to allow members of the group to change the content of a chart that is designated as Shared via the Access field in the Chart Designer. <li data-bbox="402 590 1463 703">■ Edit Shared Alert: Select to allow members of the group to change the settings of an alert configured with specified support representatives in the Send To field. <li data-bbox="402 709 1463 823">■ Delete Private Tab: Select to allow members of the group to delete tabs designated as Private (via the Sharing &Permissions option on the tab menu). Private tabs are not available to other support representatives. <li data-bbox="402 829 1463 942">■ Delete Shared Tab: Select to allow members of the group to delete a tab that is designated as Shared via the Sharing & Permissions option on the tab menu. <li data-bbox="402 949 1463 1062">■ Delete Private View: Select to allow members of the group to delete a view that is designated as Private via the Access field in the View Designer. <li data-bbox="402 1068 1463 1104">■ Delete Shared View: Select to allow members of the group to delete a view that is designated as Shared via the Access field in the View Designer. <li data-bbox="402 1110 1463 1184">■ Delete Private Chart: Select to allow members of the group to delete a chart designated as Private via the Access field in the Chart Designer. <li data-bbox="402 1190 1463 1264">■ Delete Shared Chart: Select to allow members of the group to delete a chart designated as Shared via the Access field in the Chart Designer. <li data-bbox="402 1270 1463 1344">■ Delete Private Alert: Select to allow members of the group to delete an alert that they have created. <li data-bbox="402 1350 1463 1423">■ Delete Shared Alert: Select to allow members of the group to delete an alert that is designated as Shared.

Assigning License Management Permissions

The License Management feature enables you to track instances of one or more software titles against a specified condition and quantity. The License Management agent scans all existing 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.

On the Permissions tab, select License Management to allow or disallow access to License Management functions such as viewing, creating, editing, and deleting Software License Profile records. You can select Apply All Selected Module Permissions at the bottom of the screen to assign the permissions that you selected to support representatives with the group designated as their primary group.

Field	Description
Reader	Click the Reader checkbox or select View to allow support representatives in the group to view any Software License Profile record. If this option is <i>not</i> selected, for all members of the group, views of Software License Profile records will not be included on the Desktop.

Field	Description
Author	<p>Click the Author checkbox or select Create New to allow support representatives in the group to create new Software License Profile records. If this option is <i>not</i> selected, the Create option will not be available for Software License Profile records on the Desktop and in the Software License Profile screen.</p>
Editor	<p>Click the Editor checkbox to select both Editor permissions, or select one or both of the following. Note: the View permission is required for these permissions.</p> <ul style="list-style-type: none"> <li data-bbox="391 506 1442 646">■ Edit: Select to allow support representatives in the group to update Software License Profile records. If this option is <i>not</i> selected, support representatives in the group can view Software License Profile records but the fields will be disabled. <li data-bbox="391 659 1372 800">■ Delete: Select to allow support representatives in the group to delete Software License Profile records. If this option is <i>not</i> selected, for all members of the group, the Delete option will not be included on the Desktop and in the Software License Profile screen.

Permissions for Report Functionality

On the Permissions tab, select Reports to allow or disallow access to functions such as the Reports option on the Desktop. The Reports option enables you to generate reports of iSupport Asset data for a specified timeframe. You can use the Apply All Selected Module Permissions link at the bottom of the screen to assign the permissions that you selected to support representatives with the group designated as their primary group.

Configuration > Support Representatives > Groups

Details | **Permissions** | Membership

[-] iSupport Permissions

- Assets
- Customers
- Desktop Content
- License Management
- Reports**

Note: Report Viewer allows display of all customer and incident information, even if permissions have been restricted for viewing the information. This permission will also allow access (via iSupport) to reports in the cSupport\Reports folder.

Report Viewer: Yes No

Note: Ad Hoc Reporting is only available if you have a version of Microsoft SQL Server 2005 other than Express Edition.

Ad Hoc Reports: Yes No

Manage Folders and Reports: Yes No

Apply all selected module permissions to all primary members of this group upon save

Field	Description
Report Viewer	Select Yes to, for all members of the group, include the following on the Desktop: the Report Viewer option on the Tab Add Content menu, the Always Show the Reports Tab option in the Preferences screen, and the Reports option on the action menu. Note: support representatives can view all customer information using the Reports option, even if permissions have been restricted.
Ad Hoc Reports	Select Yes to, if a member of the group includes the Reports tab on the Desktop, enable display of the Ad Hoc Reports option that tab. The Ad Hoc Reports option enables support representatives to create SQL reports.

Field	Description
Manage Folders and Reports	Select Yes to, if a member of the group includes the Reports tab on the Desktop, enable display of the Manage Group Access icon next to the reports. The Groups Access feature enables support representatives to set group access permissions on SQL reports.

Applying All Permissions to Primary Group Members

You can use the Apply All Selected Module Permissions link to assign the permissions that you selected to support representatives with the group designated as their primary group.

Apply Permissions to Primary Group Members

Click OK to apply the following permissions to all primary members of the group.

Selected Permissions	
Archive Viewer	
Assets Author:	Create New Scan
Assets Editor:	Edit
Assets Reader:	View
Customers Author:	Create New
Customers Editor:	Edit Change EUD Password Change EUD Access
Customers Reader:	View
Incidents Author:	Create New Use Hierarchy Templates Add Work History to All

Primary Group Members
Joe Smith
Alice Jones
Nina Simone

Using Permissions Views

To view a list of support representatives and their permissions, there are two views in the Configuration module:

- Select Support Representatives | Permissions | Flat to view a list of each permission for each support representative. You can use the Export All to Microsoft Excel link to export the data in this view to a Microsoft® Excel spreadsheet.

Configuration > Support Representatives > Permissions > Flat				
Export All to Microsoft Excel				
First Name ▲	Last Name	Primary Group	Module	Permission
Abby	Kienle	Quality Control	Configuration	Administrator
Abby	Kienle	Quality Control	Knowledge	Approver
Abby	Kienle	Quality Control	Incident Data Override	Allowed
Abby	Kienle	Quality Control	Reports	Viewer

- Select Support Representatives | Permissions | Summarized to view all of the permissions for each support representative. You can use the Print link to print this view.

[Configuration](#) > [Support Representatives](#) > [Permissions](#) > **Summarized**

Print

Name	Group
Abby Kienle	Quality Control
Alerts Author:	Create Private Create Shared
Alerts Editor:	Edit Shared Delete Private Delete Shared
Assets Author:	Create New Asset Use Multiple Asset Wizard Create Scan / Comparison
Assets Editor:	Edit Asset Delete Asset Delete Scan / Comparison

Adding Support Representatives to a Group

Use the Membership tab to add support representatives to the group.

Configuration > Support Representatives > Groups

Details Permissions **Membership**

Non Members

- Abby Kienle
- Dwayne March
- Gena Pirie
- Jack Sullivan
- Jorge Quentin
- Kelsey Stout
- Mary Smith
- Stuart Copeland
- Tess French

Members

- Barry White *
- Connor Flynn
- System Administrator *

→
←

* Denotes primary group membership

Save Delete Cancel

Field	Description
Non Members/ Members	To add a support representative to the group, select the support representative in the Non Members field and click the  icon. To remove a support representative from the group, select the support representative in the Members field and click the  icon.

Setting Up Support Representatives

The iSupport Asset Configuration Wizard appears when the Desktop is initially accessed by the System Administrator profile. It includes options for creating groups, creating support representative profiles, and assigning support representatives to groups. Those assigned to the Administrators group via the wizard will have access to configuration options.

Use the Support Representative screen to set up every person in your organization that will be using iSupport Asset. To access the Support Representative entry screen, select Support Representatives | Profiles on the Configuration menu.

Configuration > Support Representatives > Profiles

Details | Groups | Permissions

First Name: Phone: Avatar:

Last Name: Fax:

Email Address: Cellular:

Pager Email Address: Location:

Support Center:

Display Time Zone:

Login:

Password:

iSupport Administrator: Yes No

First Rep to Notify:

Second Rep to Notify:

*The Display Time Zone is for display purposes only. Incident business hour escalation and statistics are based on the assignee's support center time zone setting.

Field	Description
First Name	Enter the name of the support representative.
Last Name	Enter the name of the support representative.
Email Address	Enter the support representative's email address.
Pager Email Address	Enter the pager address for the support representative.
Phone	Enter the phone number for the support representative.
Fax	Enter the fax number for the support representative.
Cellular	Enter the support representative's cellular phone number.
Location	Select the location for the support representative. Locations are used for location-based routing.

Field	Description
Support Center	If applicable, select the support center for the support representative or leave Default selected to use the support center specified as default in the Support Center screen. The support center's time zone will be used for business hour statistics and service level agreement calculations. If you choose not to assign a support center, business hour statistics and service level agreement calculations will use the time zone settings of the server hosting iSupport Asset.
Display Time Zone	Select the time zone to use for date/time stamps that will display for the support representative. This is for display purposes on the support representative's Desktop client only. If a support representative changes his/her display time zone in the Preferences screen, it will be updated in their Support Representative record.
iSupport Administrator	Select Yes to allow the Configuration option to appear on the function bar on the Desktop and on the Details tab in the Preferences screen for the support representative.
First Rep to Notify	Select first person to which notifications should be sent regarding events such as escalation. Notifications are enabled in the SLA and Custom Notification screens in the Configuration module.
Second Rep to Notify	Select second person to which notifications should be sent regarding events such as escalation. Notifications are enabled in the SLA and Custom Notification screens in the Configuration module.
Login	Enter the support representative's user name for logging into the Desktop. If using Microsoft® Windows-based authentication with iSupport to bypass the iSupport Login prompt, enter the support representative's Microsoft® Windows user name as follows: <i>DOMAINNAMEusername</i> .
Password	If you are <i>not</i> using Microsoft® Windows-based authentication with iSupport Asset, enter the support representative's password for logging into the Desktop. Support representatives can change their password via the Preferences link on the Desktop.
Avatar	Click the Browse button to select a picture to appear in the Support Representative Profile screen.

Designating Groups

Use the Groups tab to designate the support representative as a member of groups for reporting, permissions, and group-based routing.

The screenshot shows a web interface for configuring support representative profiles. The breadcrumb trail is "Configuration > Support Representatives > Profiles". There are three tabs: "Details", "Groups" (which is selected), and "Permissions".

The "Groups" tab is divided into two main sections:

- No Membership:** A list of groups that are not currently assigned to the support representative. The list includes: Support, Applications, Development, Quality Control, Tier One, and Tier Two.
- Membership:** A list of groups currently assigned to the support representative. The "Primary" field is set to "Administrators". Below it, the "Network" group is listed.

Navigation controls include a right-pointing arrow icon between the "No Membership" and "Membership" panels, and a set of right and left arrow icons below it. At the bottom of the interface are three buttons: "Save", "Delete", and "Cancel".

Field	Description
No Membership/ Membership	Use the Primary field to designate the primary group for the support representative.
Primary	To designate the support representative's primary group, select the group in the No Membership field and click the  icon next to the Primary field.

Field	Description
	<p>Then select the groups in which the support representative should be a member.</p> <ul style="list-style-type: none"> ■ To add a support representative to a group, select the group in the No Membership field and click the  icon. ■ To remove a support representative from a group, select the group in the Membership field and click the  icon.

Changing the Primary Group for Multiple Support Representatives

To change the primary group for more than one support representative at one time, select Support Representatives | Profiles and use the checkboxes on the left in the Support Representatives screen to select the support representatives. Then click the Change Primary Group link.

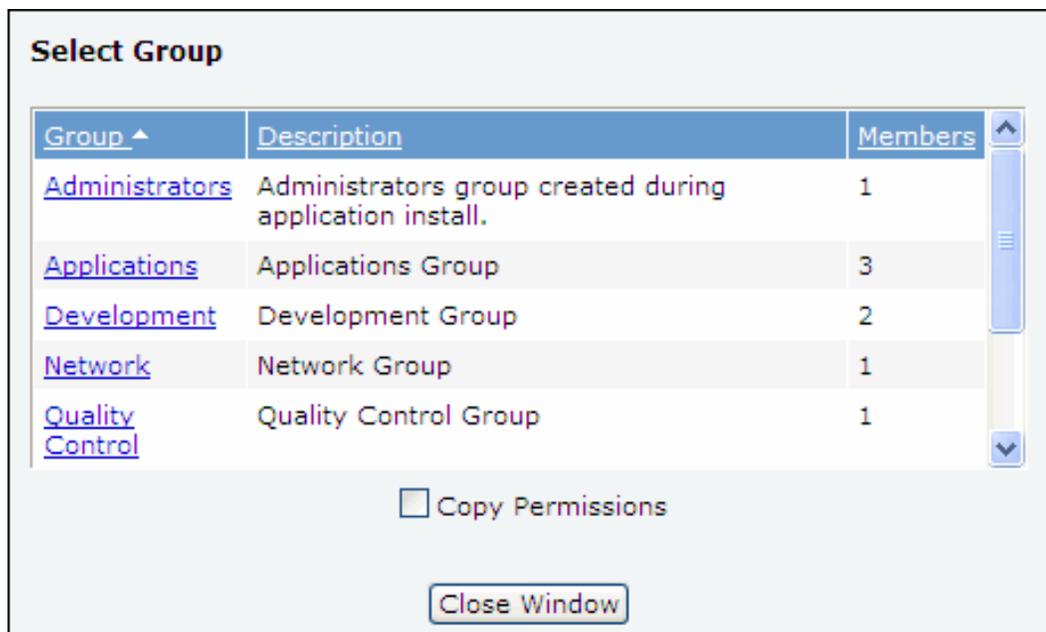


Configuration > Support Representatives > Profiles

[Create](#) [Change Primary Group](#) [Change Permissions](#) [Export All to Microsoft Excel](#) [Delete](#)

<input type="checkbox"/>	First Name ^	Last Name	Available	Primary Group
<input type="checkbox"/>	Abby	Kienle	Yes	Quality Control
<input type="checkbox"/>	Barry	White	Yes	Development
<input type="checkbox"/>	Connor	Flynn	Yes	Applications
<input type="checkbox"/>	Dwayne	March	Yes	Network

The following dialog appears:



Select Group

Group ^	Description	Members
Administrators	Administrators group created during application install.	1
Applications	Applications Group	3
Development	Development Group	2
Network	Network Group	1
Quality Control	Quality Control Group	1

Copy Permissions

[Close Window](#)

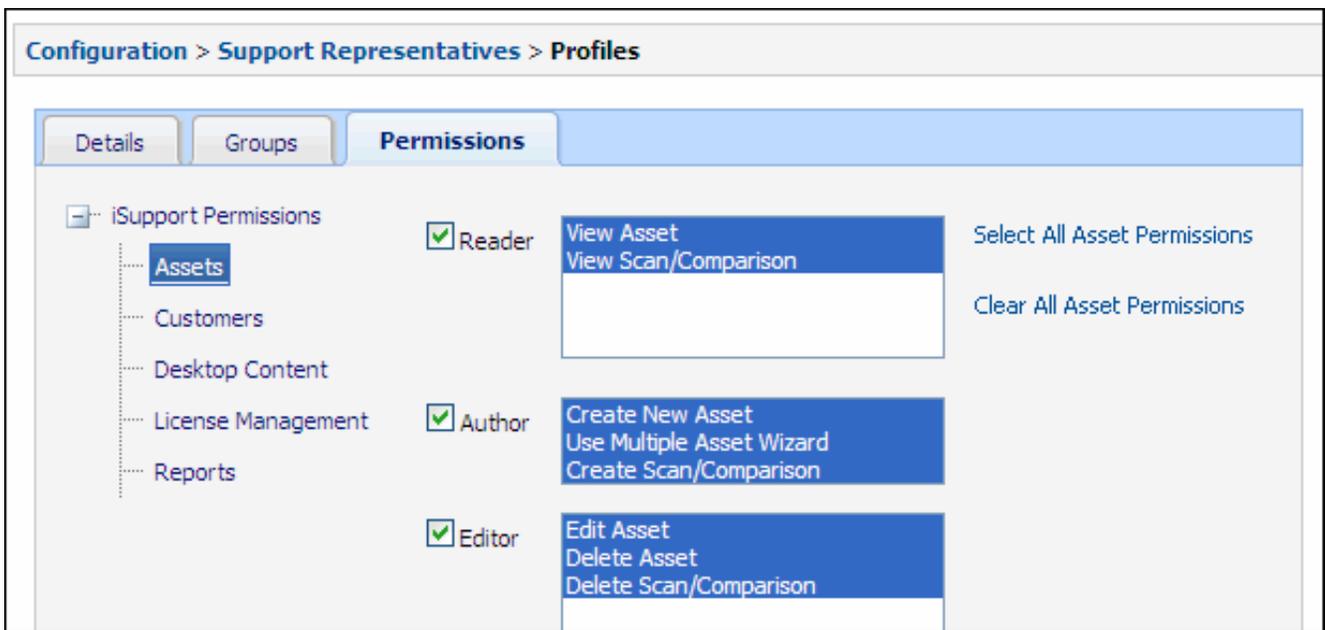
Select the group to be the primary group for the selected support representatives. Select the Copy Permissions checkbox to replace the permissions of the selected support representatives with the permissions of the group.

Assigning Permissions to Support Representatives

If Permissions are enabled in the Global Configuration screen, you can use the Permissions tab to allow or disallow certain types of access to iSupport Asset functionality.

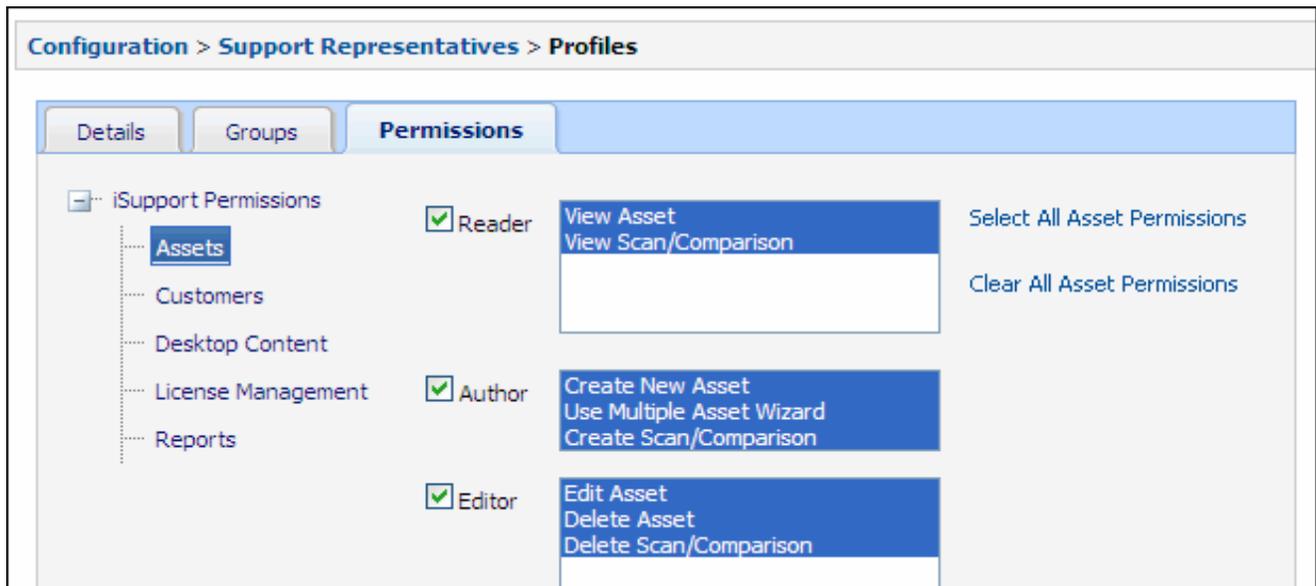
When you select an option on the left on the Permissions tab, the applicable fields will display. Use the Select All link to select all permissions, or the Clear All link to deselect all permissions.

With the Reader permissions, functionality will only be allowed for selected permissions. With Author and Editor permissions, if a permission is *not* selected, the function will not display for the support representative.



Assigning Asset Permissions

On the Permissions tab, select Assets to allow or disallow access to asset functions such as creating, viewing, updating fields, and scanning.

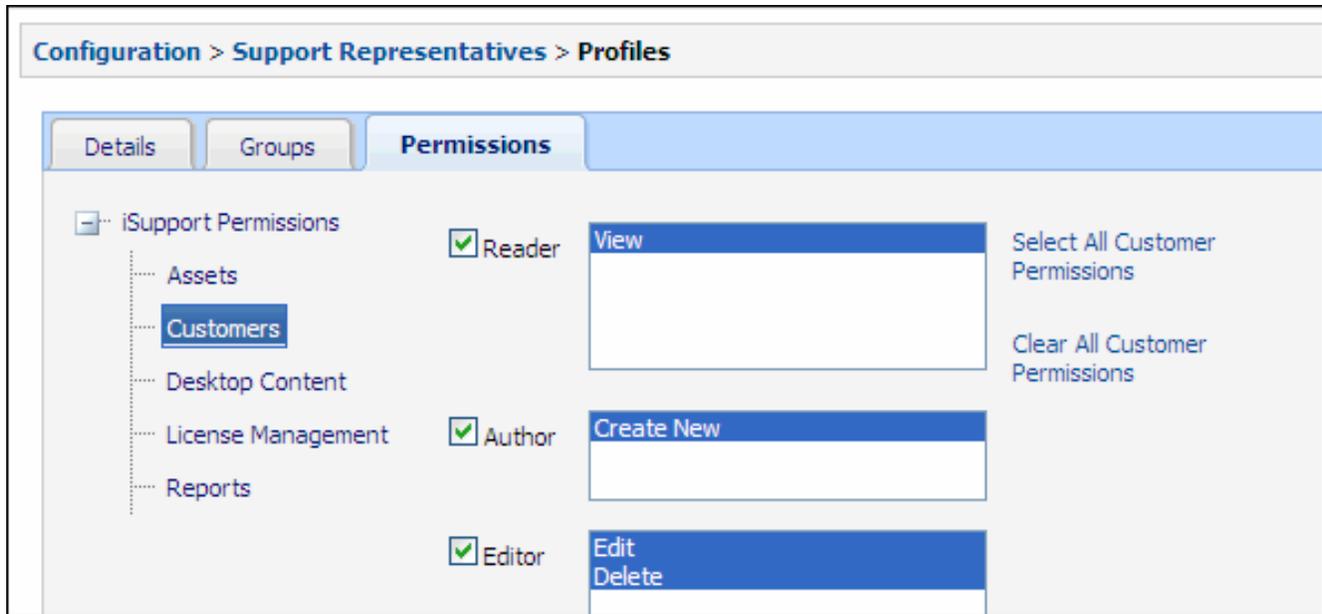


Field	Description
Reader	<p>Click the Reader checkbox or select View Asset to allow the support representative to view any Asset record. If this option is <i>not</i> selected, all views of Asset records will not be included on the Desktop.</p> <ul style="list-style-type: none"> ■ View Scan/Comparison: Select to allow the support representative to view any Asset Scan Comparison record. If this option is <i>not</i> selected, all views of Asset Scan Comparison records will not be included on the Desktop.
Author	<p>Click the Author checkbox to select all Author permissions, or select one or all of the following:</p> <ul style="list-style-type: none"> ■ Create New: Select to allow the support representative to create Asset records. If this option is <i>not</i> selected, the Create Asset option will not be included on the Desktop. ■ Use Multiple Asset Wizard: Select to include the Asset Creation Wizard on the Create menu on the Desktop Home page for the support representative. The Asset Creation Wizard enables automatic creation of multiple Asset records; you can enter data to populate asset fields in all records created, display prompts for entering data unique to a record, and save your settings in a profile for use later. ■ Scan/Comparison: Select to allow the support representative to perform a scan on a computer that has Microsoft Windows® 98 and above or any other WMI (Windows® Management Instrumentation)-compliant machine over the network, and to perform a scan comparison. If this option is <i>not</i> selected and the support representative has the View permission, he/she can view Asset records but the Scan fields will be disabled.

Field	Description
Editor	<p>Click the Editor checkbox to select all Editor permissions, or select one or all of the following. Note: the View permission is required for these permissions.</p> <ul style="list-style-type: none"> ■ Edit Asset: Select to allow the support representative to update Asset records. ■ Delete Asset: Select to allow the support representative to delete Asset records. If this option is <i>not</i> selected, the Delete option will not be included in the Asset screen and on the Desktop. ■ Delete Scan/Comparison: Select to allow the support representative to delete Asset records. If this option is <i>not</i> selected, the Delete option will not be included in the Asset Scan Comparison screen and on the Desktop.

Assigning Customer/Company Permissions

On the Permissions tab, select Customers to allow or disallow access to customer functions such as creating, viewing, and updating fields. Company permissions are tied to these settings; if a support representative has permission to delete a Customer Profile record, he/she also has permission to delete a Company record.

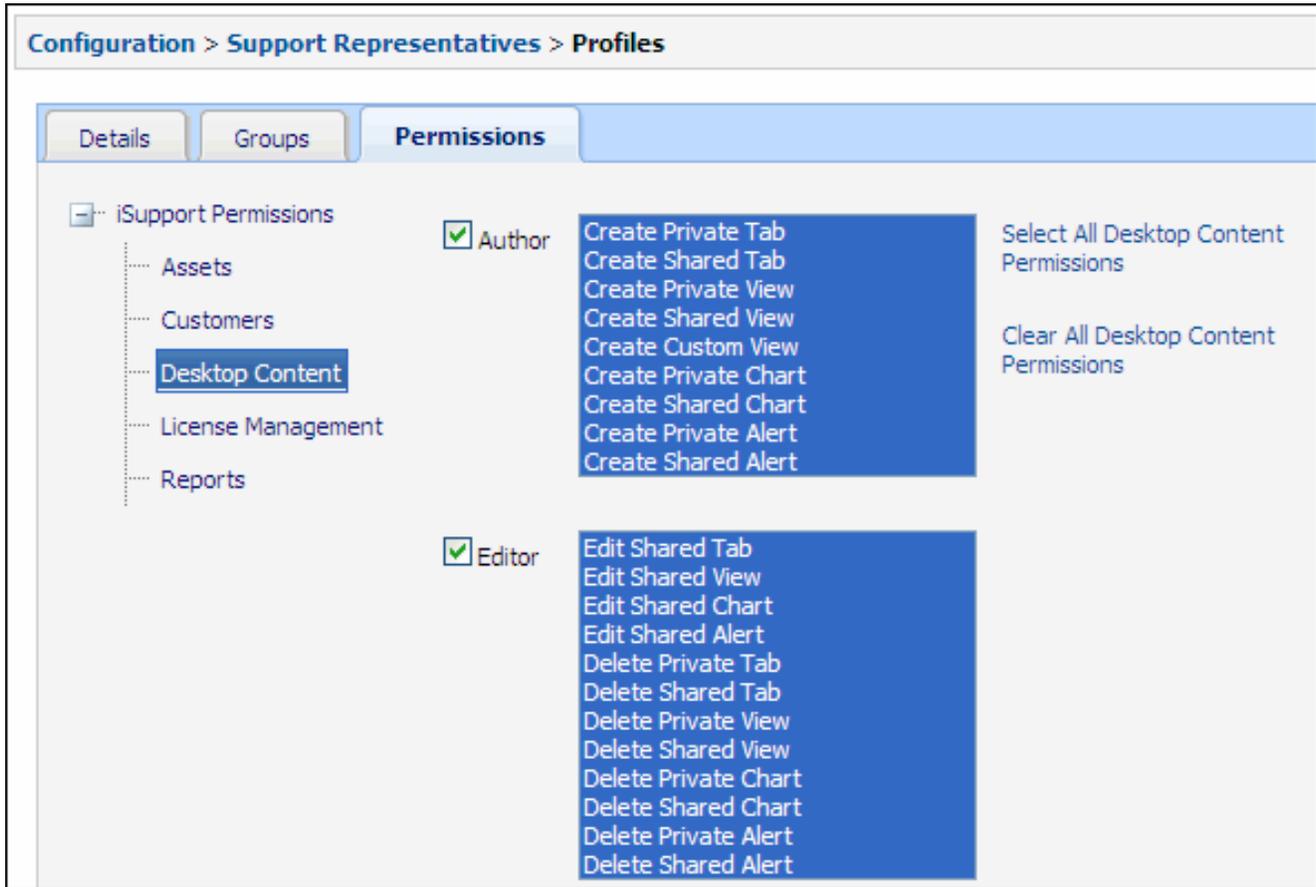


Field	Description
Reader	Click the Reader checkbox or select View to allow the support representative to view any Customer Profile or Company record. If this option is <i>not</i> selected, all views of Customer Profile and Company records will not be included on the Desktop.
Author	Click the Author checkbox to select all Author permissions, or select one or all of the following. <ul style="list-style-type: none"> ■ Select Create New to allow the support representative to create Customer Profile and Company records. If this option is <i>not</i> selected, the Create Customer and Create Company options will not be included on the Desktop. Only basic customer information can be entered for a new customer or company in the Select Customer dialog. <p>If the Create New option is <i>not</i> selected, the Create Customer and Create Company options will not be included on the Desktop. Only basic customer information can be entered for a new customer or company in the Select Customer dialog.</p>

Field	Description
Editor	<p data-bbox="358 201 1463 268">Click the Editor checkbox to select all Editor permissions, or select one or more of the following.</p> <p data-bbox="358 279 1463 417">Note: the View permission is required in order to select any of these permissions. If a support representative has the Author Create New permission but no Editor Edit permission, the Save and Close Window menu option and icon will not be available after a Customer Profile or Company Record is initially saved.</p> <ul data-bbox="358 428 1463 611" style="list-style-type: none"><li data-bbox="358 428 1463 495">■ Edit: Select to allow the support representative to update Customer Profile and Company records.<li data-bbox="358 506 1463 611">■ Delete: Select to allow the support representative to delete Customer Profile and Company records. If this option is <i>not</i> selected, the Delete option will not be included in the Customer Profile and Company screen.

Assigning Desktop Content Permissions

On the Permissions tab, select Desktop Content to allow or disallow display of the tab, view, chart, and alert functionality on the Desktop.



Field	Description
Author	<ul style="list-style-type: none"> ■ Create Private Tab: Select Yes to enable the support representative to create tabs for display on their own Desktop. If this option is not enabled, the Add New Tab option is grayed out on the Add Tab menu for the support representative.

Field	Description
	<ul style="list-style-type: none"> <li data-bbox="402 203 1458 306">■ Create Shared Tab: Select to enable the support representative to create tabs that are designated as Shared (tabs that other support representatives can access via the Add Existing Tab option on the Add Tab menu). <li data-bbox="402 321 1442 390">■ Create Private View: Select to enable the View Designer to appear on the Desktop action menu for the support representative. <li data-bbox="402 405 1458 621">■ Create Shared View: This permission requires the Create Private View permission. Select this option to include the Access field in the View Designer for the support representative. The support representative will be able to create private views that cannot be accessed by other representatives, as well as shared views that can be accessed by other representatives. <li data-bbox="402 636 1458 810">■ Create Custom View: This permission requires the Create Private View permission. Select this option to include the Design Custom View link in the View Designer for the support representative. The Design Custom View link enables users to access existing custom SQL queries within an iSupport Asset SQL table. <li data-bbox="402 825 1458 894">■ Create Private Chart: Select to enable the Chart Designer to appear on the Desktop action menu for the support representative. <li data-bbox="402 909 1458 1125">■ Create Shared Chart: This permission requires the Create Private Chart permission. Select this option to include the Access field in the Chart Designer for the support representative. The support representative will be able to create private charts that cannot be accessed by other representatives, as well as shared charts that can be accessed by other representatives. <li data-bbox="402 1140 1442 1243">■ Create Private Alert: Select to enable the Alert icon to appear in content frames, and the Alert button to appear in the View Designer and Chart Designer for the support representative. <li data-bbox="402 1257 1458 1440">■ Create Shared Alert: Select to include the Send To field in the Alert creation screen for the support representative. The support representative will be able to create private alerts that cannot be accessed by other representatives, as well as shared alerts that can be accessed by other representatives.

Field	Description
Editor	<ul style="list-style-type: none"> <li data-bbox="402 201 1458 342">■ Edit Shared Tab: Select to allow the support representative to change the content of a tab that is designated as Shared via the Sharing & Permissions option on the tab menu. Other support representatives can add tabs designated as Shared to their own Desktops. <li data-bbox="402 359 1458 459">■ Edit Shared View: Select to allow the support representative to change the content of a view that is designated as Shared via the Access field in the View Designer. <li data-bbox="402 476 1458 577">■ Edit Shared Chart: Select to allow the support representative to change the content of a chart that is designated as Shared via the Access field in the Chart Designer. <li data-bbox="402 594 1458 695">■ Edit Shared Alert: Select to allow the support representative to change the settings of an alert configured with specified support representatives in the Send To field. <li data-bbox="402 711 1458 812">■ Delete Private Tab: Select to allow the support representative to delete tabs designated as Private (via the Sharing & Permissions option on the tab menu). Private tabs are not available to other support representatives. <li data-bbox="402 829 1458 930">■ Delete Shared Tab: Select to allow the support representative to delete a tab that is designated as Shared via the Sharing & Permissions option on the tab menu. <li data-bbox="402 947 1458 1047">■ Delete Private View: Select to allow the support representative to delete the content of a view that is designated as Private via the Access field in the View Designer. <li data-bbox="402 1064 1458 1131">■ Delete Shared View: Select to allow the support representative to delete a view that is designated as Shared via the Access field in the View Designer. <li data-bbox="402 1148 1458 1215">■ Delete Private Chart: Select to allow the support representative to delete a chart designated as Private via the Access field in the Chart Designer. <li data-bbox="402 1232 1458 1299">■ Delete Shared Chart: Select to allow the support representative to delete a chart designated as Shared via the Access field in the Chart Designer. <li data-bbox="402 1316 1458 1383">■ Delete Private Alert: Select to allow the support representative to delete an alert they have created. <li data-bbox="402 1400 1458 1467">■ Delete Shared Alert: Select to allow the support representative to delete an alert configured with specified support representatives in the Send To field.

Assigning License Management Permissions

The License Management feature enables you to track instances of one or more software titles against a specified condition and quantity. The License Management agent scans all existing 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.

On the Permissions tab, select License Management to allow or disallow access to License Management functions such as viewing, creating, editing, and deleting Software License Profile records.



Field	Description
Reader	Click the Reader checkbox or select View to allow the support representative to view any Software License Profile record. If this option is <i>not</i> selected, views of Software License Profile records will not be included on the Desktop for the support representative.
Author	Click the Author checkbox or select Create New to allow the support representative to create new Software License Profile records. If this option is <i>not</i> selected, the Create option will not be available to the support representative for Software License Profile records on the Desktop and in the Software License Profile screen.

Field	Description
Editor	<p>Click the Editor checkbox to select both Editor permissions, or select one or both of the following. Note: the View permission is required for these permissions.</p> <ul style="list-style-type: none"><li data-bbox="386 310 1461 422">■ Edit: Select to allow the support representative to update Software License Profile records. If this option is <i>not</i> selected, the support representative can view Software License Profile records but the fields will be disabled.<li data-bbox="386 428 1461 575">■ Delete: Select to allow the support representative to delete Software License Profile records. If this option is <i>not</i> selected, the Delete option will not be included on the Desktop and in the Software License Profile screen for the support representative.

Assigning Permissions for Reporting Functionality

On the Permissions tab, select Reports to allow or disallow access to the Report Viewer, Ad Hoc reports, and Report Access functionality.

Configuration > Support Representatives > Profiles

Details Groups **Permissions**

iSupport Permissions

- Assets
- Customers
- Desktop Content
- License Management
- Reports**

Note: Report Viewer allows display of all customer and incident information, even if permissions have been restricted for viewing the information. This permission will also allow access (via iSupport) to reports in the cSupport\Reports folder.

Report Viewer: Yes No

Note: Ad Hoc Reporting is only available if you have a version of Microsoft SQL Server 2005 other than Express Edition.

Ad Hoc Reports: Yes No

Manage Folders and Reports: Yes No

Field	Description
Report Viewer	Select Yes to include the following on the Desktop for the support representative: the Report Viewer option on the Tab Add Content menu, the Always Show the Reports Tab option in the Preferences screen, and the Reports option on the action menu. Note: the support representative will be able to view all customer using the Reports option, even if permissions have been restricted.
Ad Hoc Reports	Select Yes to, if a support representative includes the Reports tab on the Desktop, enable display of the Ad Hoc Reports option that tab. The Ad Hoc Reports option enables support representatives to create SQL reports.
Manage Folders and Reports	Select Yes to, if a support representative includes the Reports tab on the Desktop, enable display of the Manage Group Access icon next to the reports. The Groups Access feature enables support representatives to set group access permissions on SQL reports.

Assigning Permissions to Multiple Support Representatives

To change permissions for more than one support representative at one time, select Support Representatives | Profiles and use the checkboxes on the left in the Support Representatives screen to select the support representatives. Then click the Change Permissions link.

Configuration > Support Representatives > Profiles				
Create Change Primary Group Change Permissions Export All to Microsoft Excel Delete				
<input type="checkbox"/>	<u>First Name</u> ^	<u>Last Name</u>	<u>Available</u>	<u>Primary Group</u>
<input type="checkbox"/>	Abby	Kienle	Yes	Quality Control
<input type="checkbox"/>	Barry	White	Yes	Development
<input type="checkbox"/>	Connor	Flynn	Yes	Applications
<input type="checkbox"/>	Dwayne	March	Yes	Network

Using Permissions Views

To view a list of support representatives and their permissions, there are two views:

- Select Support Representatives | Permissions | Flat to view a list of each permission for each support representative. You can use the Export All to Microsoft Excel link to export the data in this view to a Microsoft® Excel spreadsheet.

Configuration > Support Representatives > Permissions > Flat

Export All to Microsoft Excel

First Name ▲	Last Name	Primary Group	Module	Permission
Abby	Kienle	Quality Control	Configuration	Administrator
Abby	Kienle	Quality Control	Knowledge	Approver
Abby	Kienle	Quality Control	Incident Data Override	Allowed
Abby	Kienle	Quality Control	Reports	Viewer

- Select Support Representatives | Permissions | Summarized to view all of the permissions for each support representative. You can use the Print link to print this view.

Configuration > Support Representatives > Permissions > Summarized

Print

Name	Group
Abby Kienle	Quality Control
Alerts Author:	Create Private Create Shared
Alerts Editor:	Edit Shared Delete Private Delete Shared
Assets Author:	Create New Asset Use Multiple Asset Wizard Create Scan / Comparison
Assets Editor:	Edit Asset Delete Asset Delete Scan / Comparison

Deleting Support Representative Records

To delete one or more Support Representative records, select Support Representatives | Profiles and use the checkboxes on the left in the Support Representatives screen to select the support representatives. Then click the Delete link.

Configuration > Support Representatives > Profiles				
Create Change Primary Group Change Permissions Export All to Microsoft Excel Delete				
<input type="checkbox"/>	<u>First Name</u> ^	<u>Last Name</u>	<u>Available</u>	<u>Primary Group</u>
<input type="checkbox"/>	Abby	Kienle	Yes	Quality Control
<input type="checkbox"/>	Barry	White	Yes	Development
<input type="checkbox"/>	Connor	Flynn	Yes	Applications
<input type="checkbox"/>	Dwayne	March	Yes	Network

Managing Tabs for Support Representatives

Select Support Representatives | Tabs in the Configuration module to add, delete, and rename tabs, specify tab access, and designate a tab as default for newly-created support representative profiles. This screen lists all tabs created and designated as Shared, as well as all private tabs that you have created. After making entries in a row, use the Save  icon to save it or the Cancel  icon to undo your entry. Use the Edit  icon to modify entries in a row.

Configuration > Support Representatives > Tabs							
Add Delete							
<input type="checkbox"/>		Name ▲	Author	Access	Default	Usage	Components
<input type="checkbox"/>		Assets	Barry White	Myself		1	1
<input type="checkbox"/>		Companies	Barry White	Myself		1	1
<input type="checkbox"/>		Customers	Barry White	Myself		1	2
<input type="checkbox"/>		Dashboard	Barry White	Myself		1	5
<input type="checkbox"/>		License Profile	Barry White	Myself		1	1
<input type="checkbox"/>		Shared	Barry White	Shared	Default	0	7

Field	Description
Name	Enter the tab name. If renaming a tab, you'll need to log off the Desktop and log back in to display the change.
Author	The support representative who created the tab.
Access	Select: <ul style="list-style-type: none"> ■ Myself to keep the tab private. ■ Shared to enable other support representatives to add the tab to their Desktop. You can click the Configure link to only allow specified support representatives and support representative groups to access the tab.
Default	Select this checkbox to, when a support representative with a newly-created profile adds the tab to his/her Desktop, set the tab as their default so it displays when the support representative logs in. Note that you can only designate shared tabs as default.
Usage	The number of support representatives that have added the tab. (This includes the support representatives and members of support representative groups added via the Configure link.)
Components	The number of content frames on the tab.

Restricting Access to a Tab

Use the Configure link on a tab row to only allow specified support representatives and support representative groups to add the tab. Click the Add link to display the following dialog for selecting the groups. **After you add one or more groups and save, the tab will be available only to members of the selected groups.**

[Configuration](#) > [Support Representatives](#) > [Tabs](#)

Restricted to the following groups and/or reps:
[Add](#) [Remove](#)

[Configuration](#) > [Support Representatives](#) > [Tabs](#)

Groups Support Representatives

Select Support Rep Groups:

<input type="checkbox"/>	Name ▲	Description
<input checked="" type="checkbox"/>	Administrators	Administrators group crea...
<input type="checkbox"/>	Applications	Applications Group
<input type="checkbox"/>	Development	Development Group
<input checked="" type="checkbox"/>	Network	Network Group
<input type="checkbox"/>	Quality Control	Quality Control Group
<input type="checkbox"/>	Support	Support group created dur...
<input type="checkbox"/>	Tier One	Tier One Support
<input type="checkbox"/>	Tier Two	Tier Two Support

Creating Customer Groups

Use customer groups for reporting and asset assignment. You can also assign customers to a group via the Customer Profile screen, Company screen, and Desktop.

Configuration > Customer Management > Groups

Support Representative Customer Asset

[Create](#) [Delete](#)

<input type="checkbox"/>	Group ▲	Description	Company Members	Customer Members
<input type="checkbox"/>	Adobe Users	Customers using Adobe products	0	2
<input type="checkbox"/>	Customer Advisory Board	Customers submitting feedback on our products	0	4
<input type="checkbox"/>	Executive Mgmt Team	Officers of the company	1	0
<input type="checkbox"/>	Platinum Support Members	Maximum support	1	3

To create a customer group, select Customer Management | Groups and click the Create link. The following screen appears:

Configuration > Customer Management > Groups

Details | Membership

Group Name:

Location: ▼

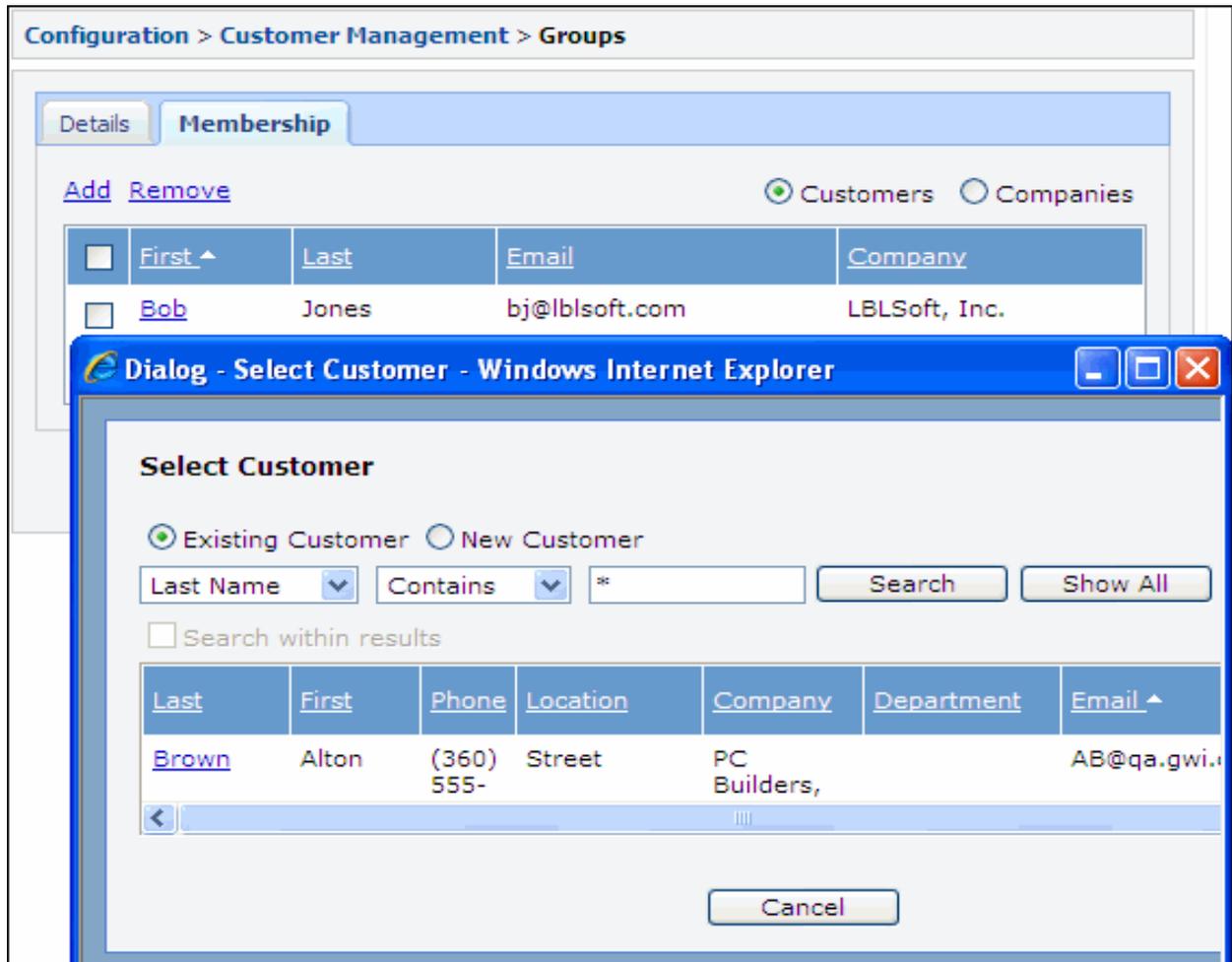
Description:

Customer group membership can be modified by support representatives with Customer Edit permission. It can be done from the Membership tab in this screen, from all customer and company views on the c.Support Desktop, and from Customer Profile and Company records.

Field	Description
Group Name	Enter the name of the customer group.
Location	Select the support representative location to associate with the customer group.
Description	Enter a description of the customer group.

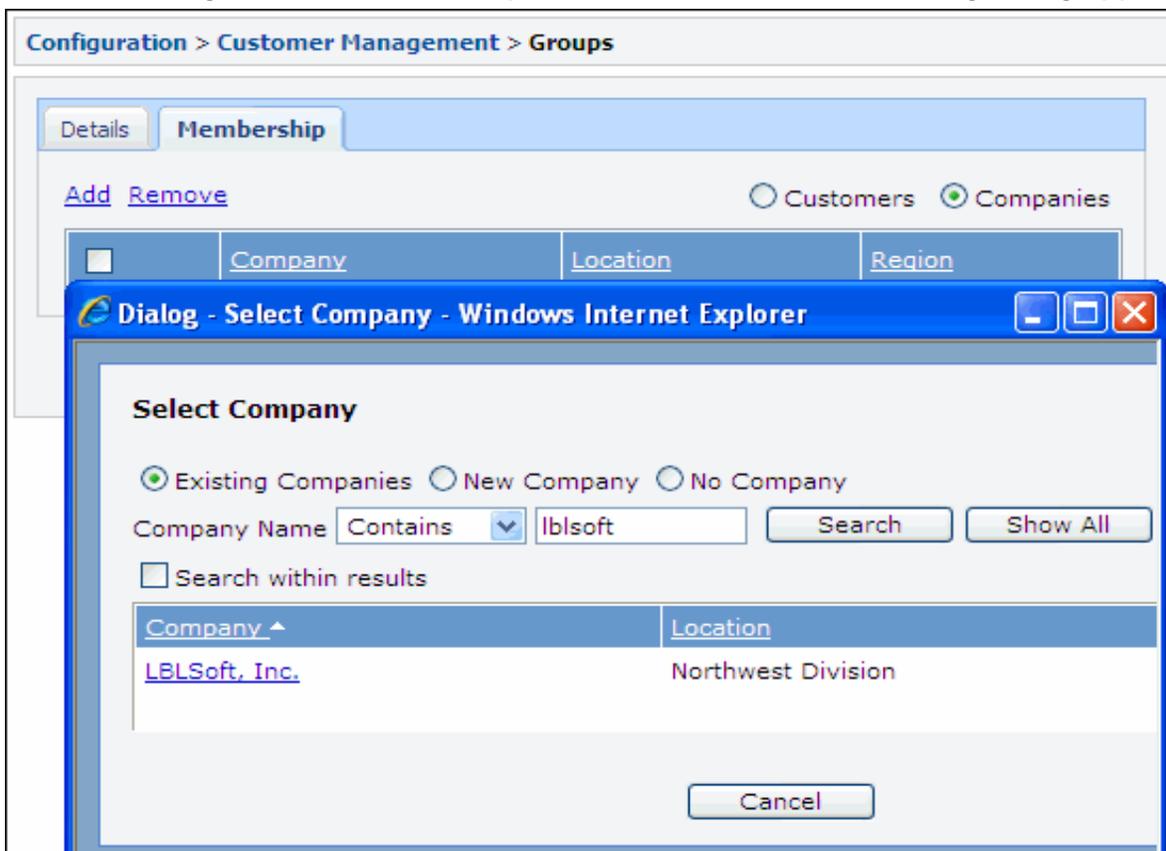
Adding Customers to Customer Groups

Use the Membership tab to assign selected customers to the group or to associate the group with a company for future customer assignment.

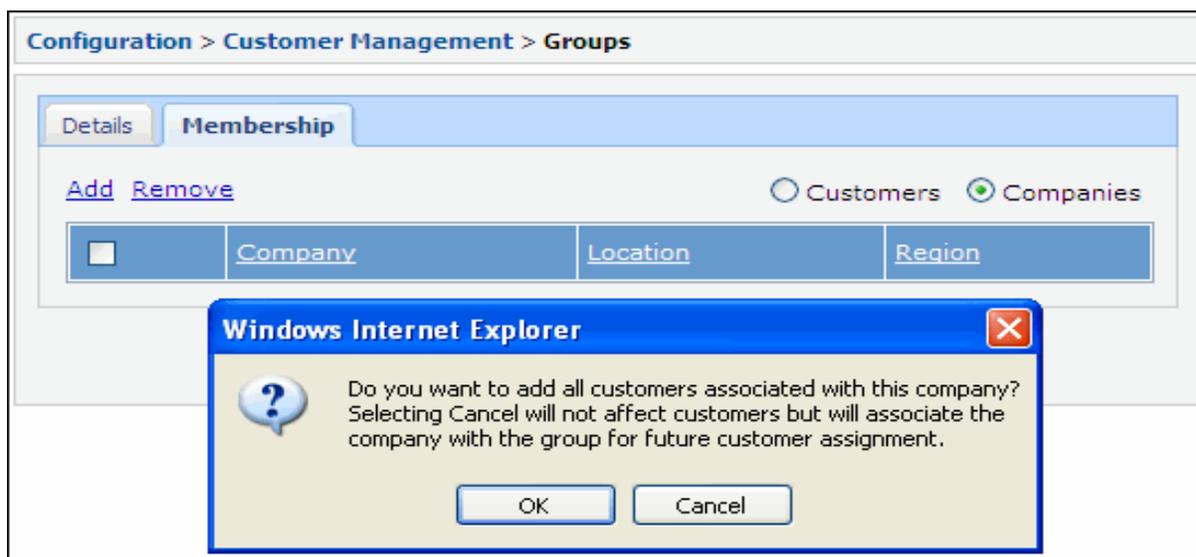


To add a customer to the group, click the Customers radio button and then click the Add link. Select an existing customer or create a new one.

To add all current customers of a company to the group or associate the group with a company for future customer assignment, click the Companies radio button. The following dialog appears:



Once you select an existing company or create a new one, following dialog appears:



If you select OK at this prompt, all of the company's current customers will become members of the group. The company will be associated with the group for future customer assignment.

If you select Cancel at this prompt, none of its current customers will be assigned to the group. However, the company will still be associated with the group for future customer assignment.

This future customer assignment can occur in the Customer Profile screen; when you add a customer for the company and save the record, the customer will become a member of the group after clicking OK at the prompt:

The screenshot shows the 'Customer Profile' screen in the iSupport application. The main form contains the following fields:

- First Name: Steve
- Last Name: Johnson
- Email: sj@lblsoft.com
- Phone: 360-397-1004
- Company: LBLSoft, Inc.

An 'Avatar' section shows a photo of a man with the text 'Add Remove' below it. Below the main form are tabs for 'Details', 'Address', 'Attachments', and 'Miscellaneous'. The 'Details' tab is active, showing:

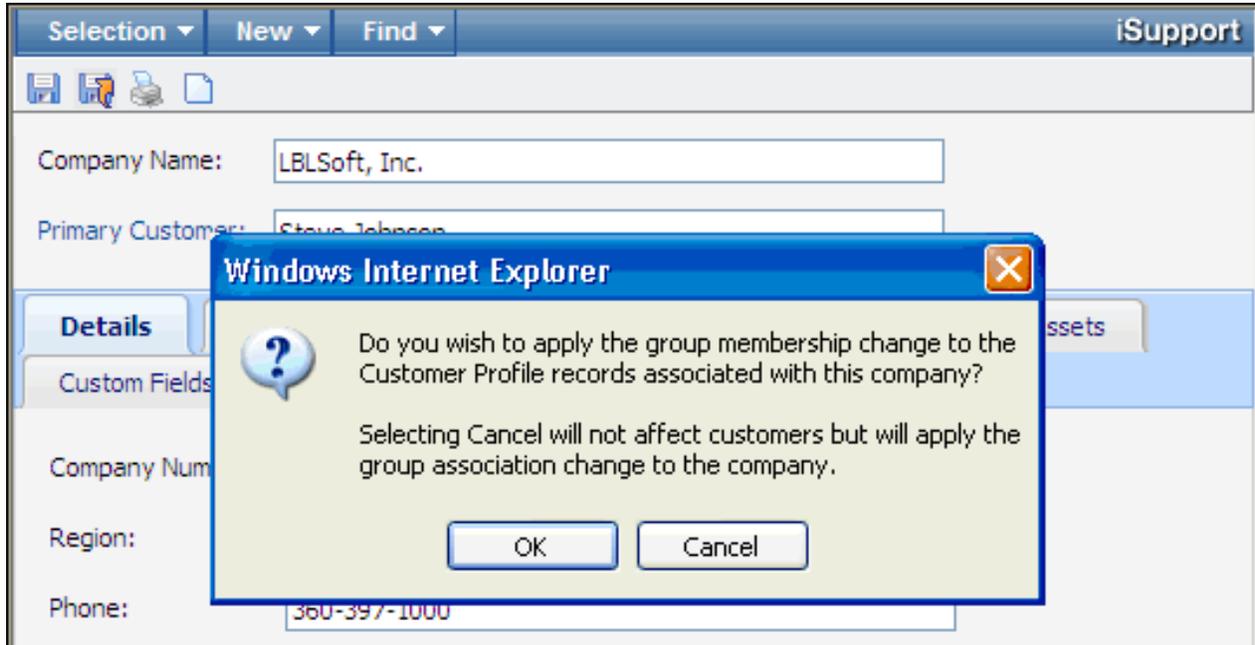
- Customer ID: 8675309
- Title: Accounting Manager
- Fax: 360-397-1007
- Cellular: 360-397-1000
- Location: Headquarters
- Manager: John Collins
- Department: Administration

A 'Windows Internet Explorer' dialog box is overlaid on the screen. The dialog contains a question mark icon and the text: 'Apply the company's associated groups to this customer's group membership? Selecting Cancel will not affect the customer's group membership.' There are 'OK' and 'Cancel' buttons at the bottom of the dialog.

You can also manually add a customer to a group or remove a customer from a group using the arrows in the Groups section in the Customer Profile screen.

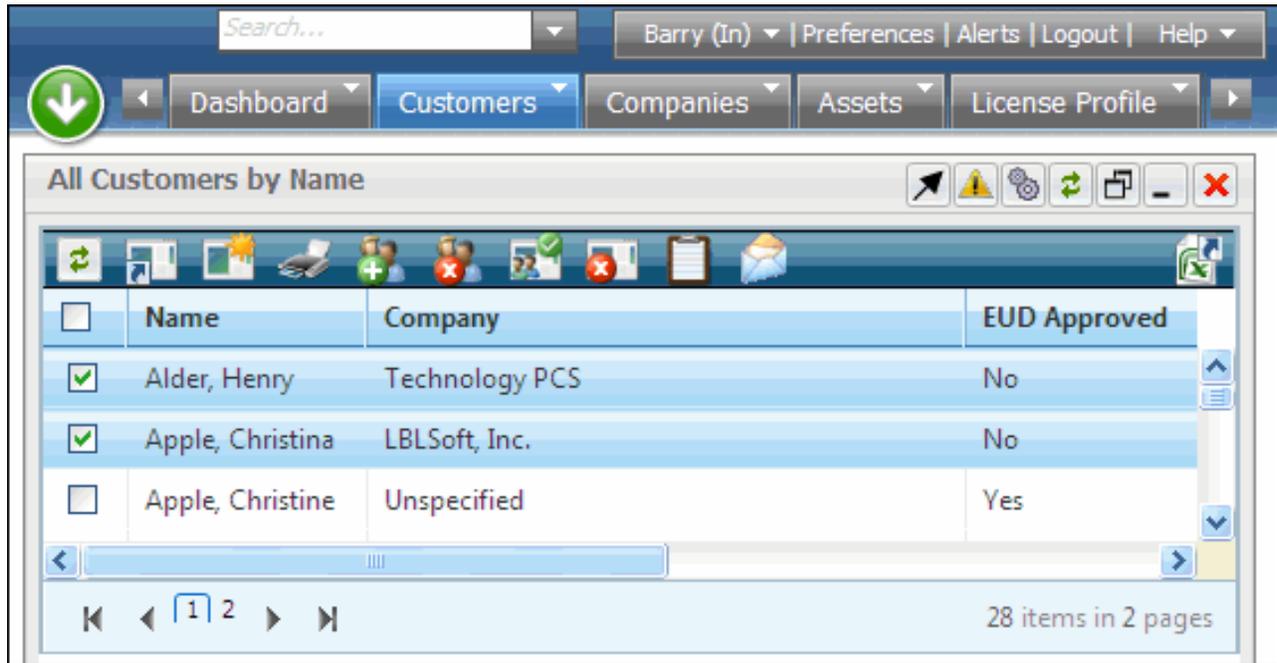
Assigning Customers via the Company Screen

In the Company screen, support representatives with Customer | Editor | Edit permission can use the Groups section to assign all of a company's current customers to a group. When you select a group and click the right arrow, a dialog appears regarding the assignment. If you select OK, all of the company's customers will become members of the selected group. If you select Cancel, the group will still be included in the Associated Groups field for future customer assignment.



Adding Customers to Groups via the Desktop

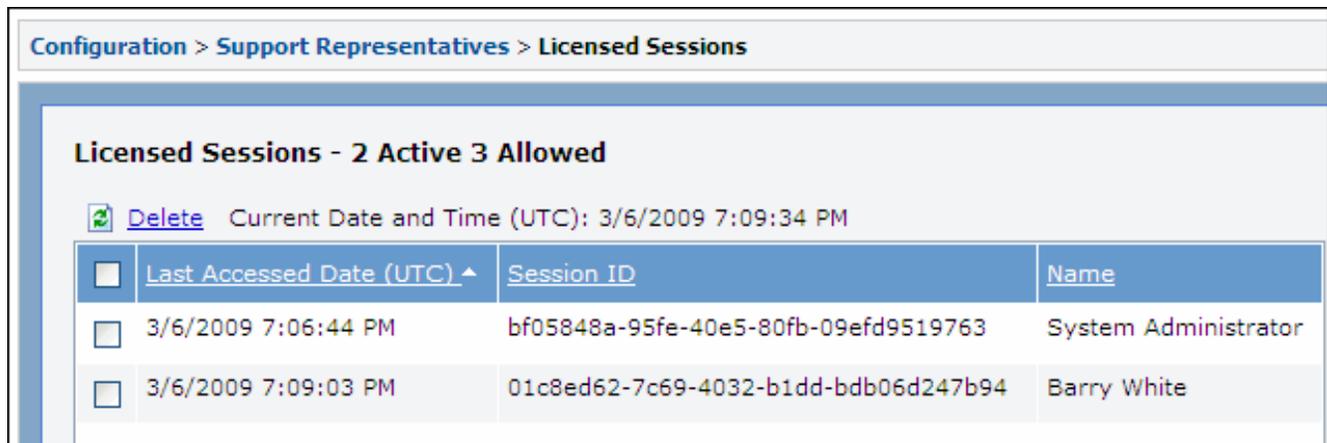
You can add selected customers to a group and remove selected customers from a group using the Add to Group  and Remove From Group  icons in customer views on the Desktop.



<input type="checkbox"/>	Name	Company	EUD Approved
<input checked="" type="checkbox"/>	Alder, Henry	Technology PCS	No
<input checked="" type="checkbox"/>	Apple, Christina	LBLSoft, Inc.	No
<input type="checkbox"/>	Apple, Christine	Unspecified	Yes

Monitoring Licensed Sessions

Use the Support Representatives | Licensed Sessions option in the Configuration module to display the support representatives currently logged into iSupport Asset. You can log off a support representative by selecting an entry and clicking the Delete link.



<input type="checkbox"/>	Last Accessed Date (UTC) ^	Session ID	Name
<input type="checkbox"/>	3/6/2009 7:06:44 PM	bf05848a-95fe-40e5-80fb-09efd9519763	System Administrator
<input type="checkbox"/>	3/6/2009 7:09:03 PM	01c8ed62-7c69-4032-b1dd-bdb06d247b94	Barry White

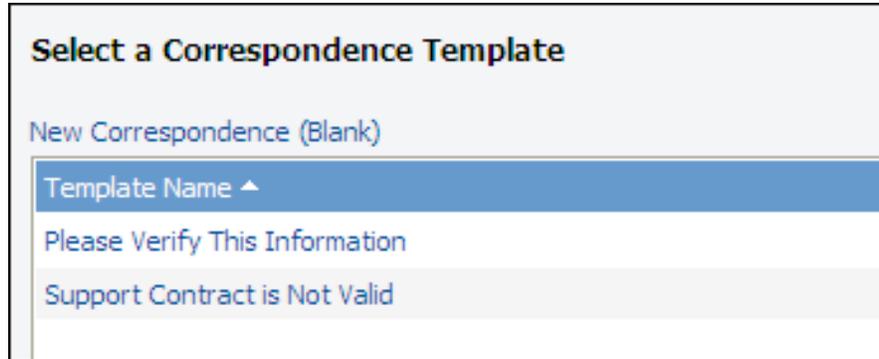
5 Setting Up Correspondence Templates

Overview

Use the Correspondence Template screen to set up correspondence templates for use in iSupport Asset entry screens. You can include all aspects of an email, including attachments.

The screenshot shows the 'Correspondence Template' configuration screen. At the top, the breadcrumb navigation reads 'Configuration > Notifications > Correspondence Templates'. The main title is 'Correspondence Template'. The form includes several fields: 'Title' (Please Verify This Information), 'From' (bw@blsoft.com), 'Subject' (More Information Required), and 'To', 'Cc', and 'Bcc' (all empty). There are checkboxes for 'Active' (checked), 'Prohibit Editing' (unchecked), and 'CC Others To Notify' (unchecked). On the right, 'Modified By' is Barry White, 'Modify Date' is 1/29/2010, and 'Priority' is Normal. Below these fields, there are dropdowns for 'Preview Correspondence with' (Customer) and 'Use With' (Customers, checked). The 'Body' tab is selected, showing a rich text editor with a toolbar and a message body containing: 'Hello, Please send me your updated contact information. This is currently in your database: <First Name><Last Name> <Email> <Company> <Phone> Thank you, Barry White'. At the bottom are 'Save', 'Delete', and 'Cancel' buttons.

When creating a correspondence, you can select a template set up during configuration or create a new email.



If creating a new correspondence document, the CC, BCC, Subject, and Attachment fields are blank. In either a blank correspondence or correspondence created from an editable template, the Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).

After the email is sent and the record is saved, Audit History notations are included on the History tab. Notations regarding system-generated notifications (for example, when a record is saved) are included.

You can select Find | Correspondence | For Customer to display all correspondence sent to the customer from the Customer Profile screen. From the Correspondence Documents dialog, you can open a document by clicking on it. System-generated correspondence documents are not included in this dialog.

You can also use the Correspondence views on the Desktop.

Creating a Correspondence Template

To access this feature, select Notifications | Correspondence Templates from the Configuration menu.

Configuration > Notifications > Correspondence Templates

Correspondence Template

Title: ABC

To:

From: Active

Cc: Prohibit Editing

Bcc: CC Others To Notify

Subject: ABC

Modified By: Barry White

Modify Date: 1/29/2010

Priority:

Preview Correspondence with: Use With: Customers

Body | Attachments

Message: Include Field

Font Name | Size | Paragraph St... | A

Hello,
 Please send me your updated contact information. This is currently in your database:
 <First Name> <Last Name>
 <Email>
 <Company>
 <Phone>
 Thank you,
 Barry White

Save | Delete | Cancel

Field	Description
Title	Enter a name for the correspondence template. If the Active checkbox is selected in this screen, this template title will display for selection in the correspondence template selection dialog.
To	Select or enter the address to which correspondence using this template should be sent.
From	Select or enter the address to be included in the Reply To field when an email is created from the template. You can format the email address according to the following examples: <ul style="list-style-type: none"> ■ support@gwi.com ■ "Support" <support@gwi.com>

Field	Description
CC	Select or enter the address to be included in the CC field when an email is created from the template. You can format the email address according to the following examples: <ul style="list-style-type: none"> ■ support@gwi.com ■ "Support" <support@gwi.com>
BCC	Select or enter the address to be included in the BCC field when an email is created from the template. You can format the email address according to the following examples: <ul style="list-style-type: none"> ■ support@gwi.com ■ "Support" <support@gwi.com>
Subject	Enter the text to be included in the Subject field when an email is created from the template.
CC Others to Notify	This field appears if the Others to Notify option is enabled in the Global Configuration screen. Select this checkbox to enable the CC: Others to Notify field when a correspondence is created from the template. If originating from a customer profile or for customers selected on the Desktop, this will copy the correspondence to those on the customer's Others to Notify list as well as the Others to Notify list of the company assigned to the customer.
Prohibit Editing	Select this checkbox to, when the template is selected, prevent all fields on the email from being edited.
Active	Select this checkbox to include the template in the correspondence template selection dialog in the Customer Profile screen.
Modified By	The name of the person who created or last modified the template is included in this field after the template is saved.
Modify Date	The date on which the template was created or last modified is included in this field after the template is saved.
Priority	Select the priority delivery level for the email created from the template.
Use With	Select Customers if the template should be included for selection in the Customer Profile screen.
Body	Enter the text to be included in the Body field when an email is created from the template. See "Including Field Values in the Template Body" on page 129 for information on including field values.

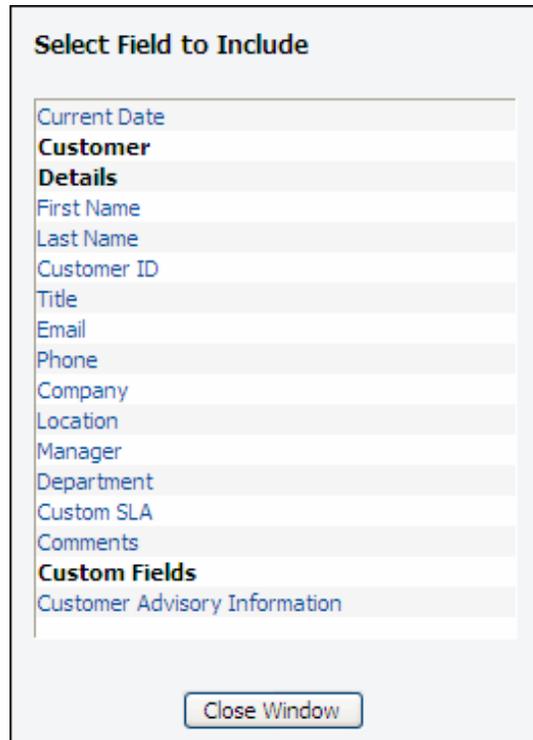
The text editor toolbar appears when you place your cursor in the Body field or click the field label link to display a larger window. See ["Using the Text Editor Toolbar" on page 16](#) for more information. You can use the Image Manager  to upload saved screenshots and other images up to 2 MB.

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).

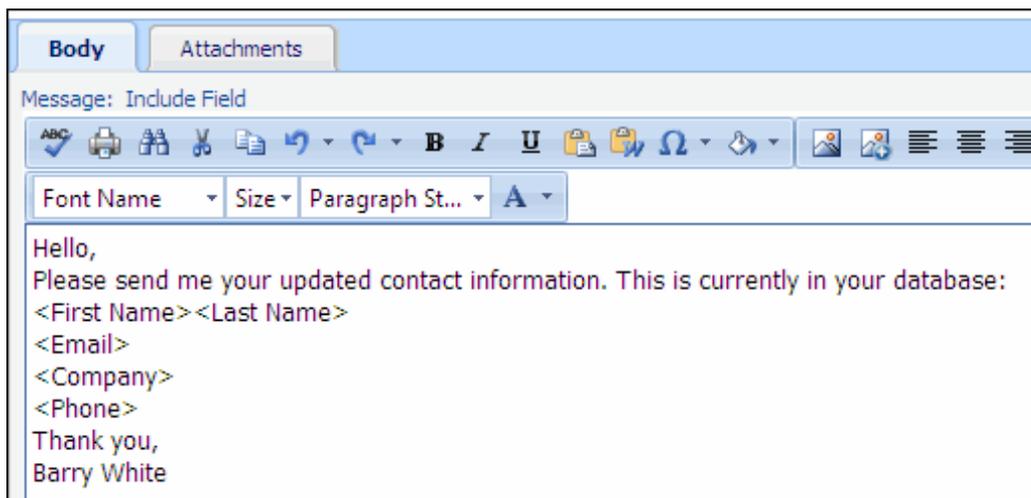
Including Field Values in the Template Body

Use the Include Field link to add field values from the current record to the Body field. When the correspondence template is selected, the selected field data will be inserted into the email.

When you click the Include Field link, the following dialog will appear for selecting values.



The values are inserted as shown in the example below:



Attaching Files

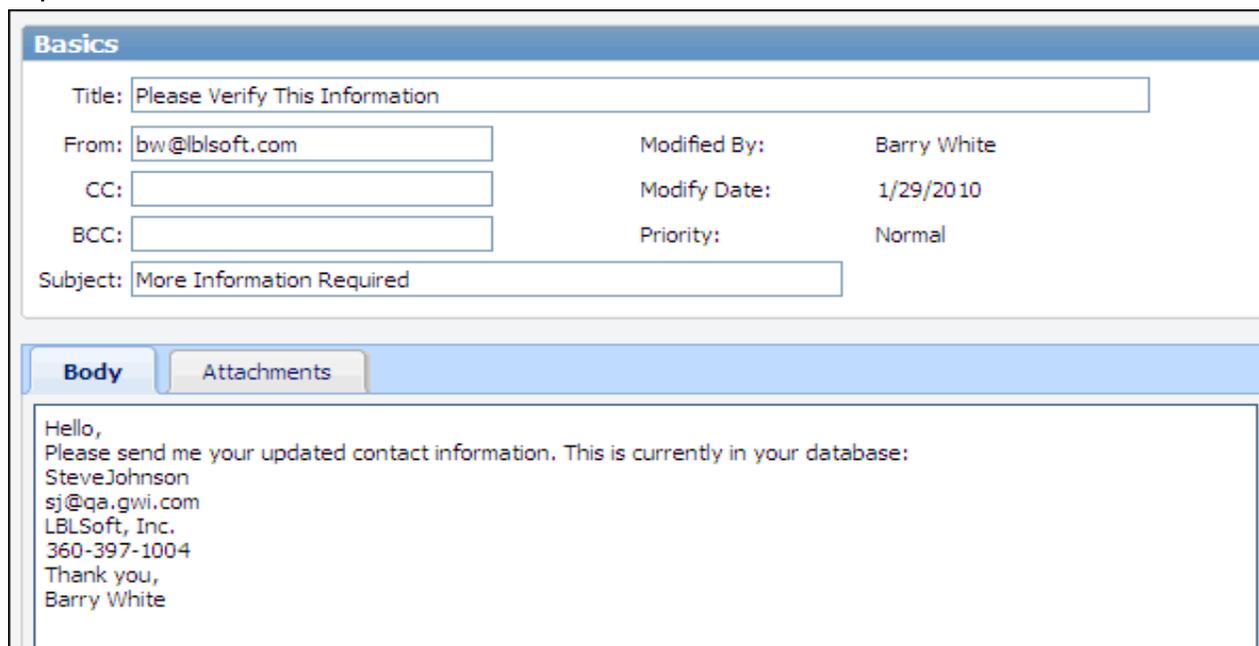
To attach a file to the correspondence template, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list.



File Name	Size	Type	
License.lic	0.916K	text/plain	Delete

Previewing a Correspondence Template

Use the Preview Correspondence link to view the template using values from a selected record. The Select dialog appears for you to select a customer. The template appears as shown in the example below:



Basics

Title: Please Verify This Information

From: bw@lblsoft.com Modified By: Barry White

CC: Modify Date: 1/29/2010

BCC: Priority: Normal

Subject: More Information Required

Body Attachments

Hello,
Please send me your updated contact information. This is currently in your database:
SteveJohnson
sj@qa.gwi.com
LBLSoft, Inc.
360-397-1004
Thank you,
Barry White



If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

When using a multiselect view to send a correspondence, if there is a value specified in the To field on a template, previewing correspondence will include the value in an Also Send To field.

6 Setting Up Assets

Overview

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

The screenshot shows the iSupport Asset entry screen. At the top, there are tabs for 'Selection' and 'New'. The main header area contains 'Name: BW Laptop', 'Type: IBM Thinkpad', and 'Source: Direct Entry'. Below this is a navigation bar with tabs for 'Details', 'Owners', 'Custom Fields', 'Groups', 'Attachments', and 'Dynamic Asset Scans'. The 'Details' tab is active, and a sub-tab 'Inventory Asset Scans' is also visible. The form fields are as follows:

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:
Replaced motherboard on 10/10/2009

You use asset types to track information on similar assets. You can set up custom fields and fields such as Owner, Tag Number, and Location to display when the asset type is selected.

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.

You can import asset data from a specified Microsoft SQL Server database to populate iSupport's Asset database.

About Asset Scans

Asset scans collect hardware, software, and service details automatically on non-Windows devices on your local subnet and on computers with Windows 98 and above or any other WMI-compliant machine (WMI must be installed and active). 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.

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 permissions may be modified to a different structure. You can set up a default login that can be 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. A partial example of a dynamic scan is shown below:

Selection ▾		New ▾		iSupport	
Summary	Title:	Baseline Workstation Scan			
Computer System	Scan Date:	11/23/2009 12:37:20 PM			
Operating System	COMPUTER SYSTEM				
Processes	Description:	AT/AT COMPATIBLE			
Services	Domain:	nec.com			
Logical Drives	Domain Role:	Member Workstation			
Software Titles	Manufacturer:	LENOVO			
Hot Fixes	Name:	DOC			
Network Adapter	Model:	88109AU			
Modem	Processors:	1			
Parallel Ports	Owner Name:	Lisa			
Serial Ports	Status:	OK			
Port Connections	Total Physical Memory:	3 GB			
Desktop Monitor	OPERATING SYSTEM				
Keyboard	Name:	Microsoft Windows XP Professional			
Pointing Device	Version:	5.1.2600 Service Pack 3			

Asset scans can also be scheduled and run automatically according to an Inventory Scan Definition, which defines the hosts (remote machines) to be scanned during a specified start and end time. You can specify a range of IP addresses, domain names, or an Active Directory path to be scanned.

Inventory scans include a comprehensive set of data. A partial example of an inventory scan is shown below:

Selection ▾	New ▾	iSupport	
Summary	Title:	Inventory Scan	
Computer System	Scan Date:	11/23/2009 1:25:35 PM	
Operating System	COMPUTER SYSTEM		
Processes	Description:	AT/AT COMPATIBLE	
Services	Domain:	nec.com	
Logical Drives	Domain Role:	Member Workstation	
Software Titles	Manufacturer:	LENOVO	
Hot Fixes	Name:	DOC	
Network Adapter	Model:	88109AU	
Modem	Processors:	1	
Parallel Ports	Owner Name:	Lisa	
Serial Ports	Status:	OK	
Port Connections	Total Physical Memory:	3 GB	
Desktop Monitor	OPERATING SYSTEM		
Keyboard	Name:	Microsoft Windows XP Professional	
Pointing Device	Version:	5.1.2600 Service Pack 3	

Inventory scans are viewed on the Desktop, and can be associated with asset records. If configured, asset records can be created automatically and associated with machines involved in inventory scans.

From the Scan screen or Desktop, you can generate and save a side-by-side comparison of dynamic or inventory scans. This functionality is controlled by support representative/group permissions.

The Setup Process

- 1 Use the Asset Type screen to set up **asset types** for classifying similar assets. You can set up fields to display in the Asset screen when an asset with a specified type is selected. If you wish to allow support representatives to perform scans without entering a login with local administrative rights, enter the user name and password for dynamic asset scans. See [“Setting Up Asset Types” on page 136](#) for more information.

If performing asset **scans** and you need to add a login with local administrative rights on a customer’s computer, right-click on My Computer and select Manage. Under Local Users and Groups, click on Groups and then double-click on Administrators. Click Add. Select the name from one of the groups in the Look In drop-down list and click Add. Click OK. In the Administrators Properties dialog, click Apply and then click OK.

- 2 If dynamic or inventory scans will be performed, ensure that **WMI** is installed and active on the machines to be scanned.
- 3 If **maintenance and warranty expiration notifications** have been set up, enable the Asset Reminder agent on the Miscellaneous tab in the Agent Configuration screen. For more information about enabling agents, see [“Scheduling and Running Agents” on page 176](#).
- 4 If applicable, set up global **custom fields** for assets. These fields will display in the Asset screen. See [“Setting Up Global Custom Fields for Assets” on page 147](#).
- 5 If applicable, **import asset data** from a specified Microsoft SQL Server database into iSupport’s Asset database. See [“Importing and Synchronizing Asset Data” on page 166](#) for more information.
- 6 Use the Support Representative Profile screen to grant **permissions** to support representatives for asset functionality. See [“Assigning Group Permissions” on page 82](#) and [“Assigning Permissions to Support Representatives” on page 101](#) for more information.
- 7 Create **asset records** using the Asset screen. See the *iSupport Asset User’s Guide* for more information.
- 8 Create **inventory scan definitions** for assets to be scanned automatically on a scheduled basis. For more information, see [“Setting Up Inventory Scans” on page 154](#). Then enable the Asset Inventory Scan agent on the Basics tab in the Agent Configuration screen. For more information about enabling agents, see [“Scheduling and Running Agents” on page 176](#).

The Inventory Scan Messages tab in the Scan Maintenance screen contains messages regarding the progress of scans run using inventory scan definitions. This includes errors that occur while retrieving or saving the data, details regarding the machines included in the range to be scanned and the machines that were unreachable, and status information. These messages are stored in the cSupport database and can accumulate quickly; it is important to use the **Clear All Messages** link in that screen to maintain the size of the stored data.

The Microsoft® Windows Event Viewer contains log entries regarding the c.Support Agent Manager. **It’s important to check the size of the Microsoft Windows Event Viewer and increase it if necessary.**

To access the Microsoft Windows Event Viewer, on the Windows Desktop, go to Start | Programs | Administrative Tools | Event Viewer | cSupport. Right-click on cSupport in the left pane and select Properties. In the cSupport Properties dialog, make adjustments in the fields in the Log Size section.

- 9 To configure automatic creation of asset records for machines that are involved in inventory scans but not associated with an existing record:
 - Create or find an asset record to be used as a template for records created for machines that are involved in inventory scans but not associated with an existing record. The asset type in the template record will determine the fields that will appear on the automatically-created record. It’s a good idea to create an Asset record specifically for use as a template.

- In the Agents screen, enable the Auto Asset Create from Inventory Scan agent, which will run every hour based on the time at which the c.Support Agent Manager service is started.

You can also execute this agent immediately via the Advanced tab in the Agents screen. You'll be able to select an existing asset record to use as a template, so this is a good method to use for control in building asset records for certain types of assets in your inventory.

For more information, see ["Creating Asset Records Automatically Based on Inventory Scans"](#) on page 164.

Setting Up Asset Types

You use asset types to classify similar assets (for example, printers and laptops). You can set up custom fields and fields such as Owner and Tag Number to display when the asset type is selected. When you enable maintenance/warranty tracking for an asset type, expiration notifications will be sent for assets associated with the asset type. To access the Asset Type screen, select Asset Management | Types on the Configuration menu. Then click the Create link. Use the Basics tab to set up asset types, enter a login for running asset scans, and set up optional and custom fields.

Configuration > Asset Management > Types

Basics | Maintenance/Warranty | Custom Notifications

Asset Type Name:

Enable Scanning: Yes No

Default User Name for Dynamic Scanning:

Default Password for Dynamic Scanning: [Reset](#)

Default SNMP Community String for Dynamic Scanning:

Optional Fields:

Owner Location Model Manufacturer

Tag Number Serial Number Purchase Date Comments

Custom Fields:

[Add](#) [Delete](#)

<input type="checkbox"/>	Row	Label	Type
<input type="checkbox"/>	1	Service Date	Date Field

Field	Description
Asset Type Name	Enter the name of the asset type. Asset types classify similar assets and enable custom and optional fields to display when recording information about an asset.
Enable Scanning	Select Yes if asset scans will be performed on assets assigned this asset type. Asset scans can be performed on non-Windows devices on your local subnet and on computers with Microsoft Windows® 98 and above (WMI must be installed and active).

Field	Description
<p>Default User Name for Dynamic Scanning</p> <p>Default Password for Dynamic Scanning</p>	<p>If asset scans are enabled, enter the user name and password to be used for accessing the machine to be scanned. This login 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 permissions may be modified to a different structure.</p> <p>When a dynamic scan is initiated, the Dynamic Asset Scan dialog appears as shown below. If you have set up a default user name and password for the selected asset type, the support representative can select Yes in the Use Default Credentials checkbox to use this default user name and password.</p> <p>If No is selected in the Use Default Credentials field, the User Name and Password fields will be enabled for entering a login.</p>
<p>Default SNMP Community String for Dynamic Scanning</p>	<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>

The Dynamic Asset Scan dialog is shown below; it appears when a dynamic scan is initiated in the Asset.

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

System Hardware

- Processors
- BIOS
- Physical Memory
- System Slots

Hardware Controllers

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

Drives

- Disk Drives
- Floppy Drives
- CD-ROM Drives

Host Address:

User Name:

Password:

Community:

Use Default Credentials Yes No



If a login is used to access a Microsoft Windows XP machine, a profile and a folder are created in the Documents and Settings folder.

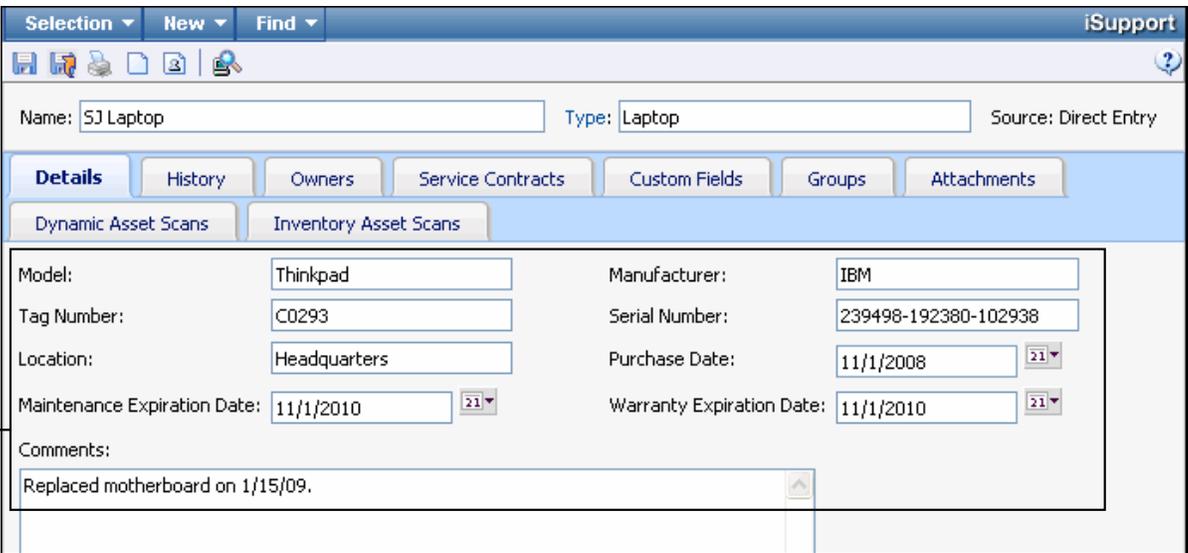
If using iSupport Asset's scanning features in a domain with a Windows 2003 domain controller, see ["Changing iSupport Asset's Access to SQL Databases"](#) on page 241 for information on integrating the security context of Windows Server 2003 Active Directory with the domain on which iSupport Asset resides.

Entering Optional and Custom Fields

You can set up custom fields and optional fields such as Owner, Tag Number, and Location to display in the Asset screen when the asset type is selected.

The custom and optional fields will display as shown below in the Asset screen:

Set up in the Optional Fields section of the Asset Type screen



Selection New Find iSupport

Name: SJ Laptop Type: Laptop Source: Direct Entry

Details History Owners Service Contracts Custom Fields Groups Attachments

Dynamic Asset Scans Inventory Asset Scans

Model: Thinkpad Manufacturer: IBM

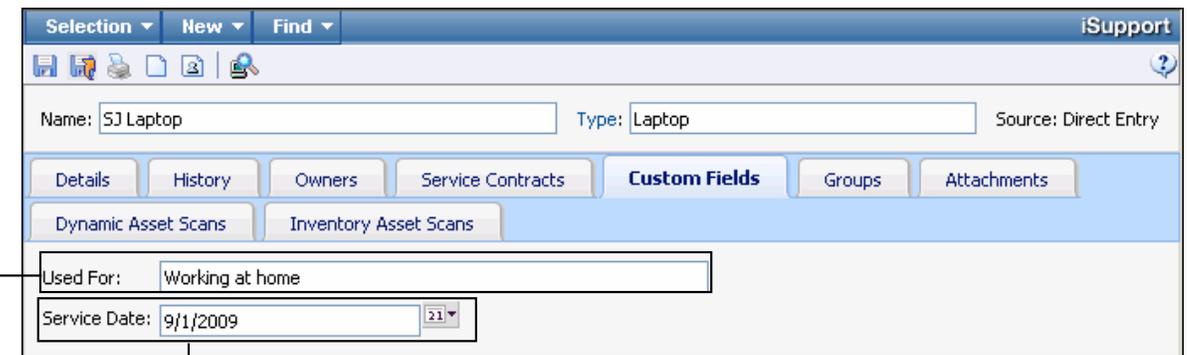
Tag Number: C0293 Serial Number: 239498-192380-102938

Location: Headquarters Purchase Date: 11/1/2008

Maintenance Expiration Date: 11/1/2010 Warranty Expiration Date: 11/1/2010

Comments:
Replaced motherboard on 1/15/09.

Set up in the Custom Fields screen



Selection New Find iSupport

Name: SJ Laptop Type: Laptop Source: Direct Entry

Details History Owners Service Contracts Custom Fields Groups Attachments

Dynamic Asset Scans Inventory Asset Scans

Used For: Working at home

Service Date: 9/1/2009

Set up in the Custom Fields section of the Asset Type screen

Use the following fields to set up optional and custom fields for the asset type.

Configuration > Asset Management > Types

Basics | Maintenance/Warranty | Custom Notifications

Asset Type Name:

Enable Scanning: Yes No

Default User Name for Dynamic Scanning:

Default Password for Dynamic Scanning: [Reset](#)

Default SNMP Community String for Dynamic Scanning:

Optional Fields:

Owner Location Model Manufacturer

Tag Number Serial Number Purchase Date Comments

Custom Fields:

[Add](#) [Delete](#)

<input type="checkbox"/>	Row	Label	Type
<input type="checkbox"/>	1	Service Date	Date Field

In the **Optional Fields** section, select the checkbox next to each field that should display when the asset type is selected in the Asset screen.

In the **Custom Fields** section, click the Add link to set up a custom field that will display in the Custom Fields section when the asset type is selected in the Asset screen.

Custom Field

Row:

Label:

Required: Yes No

Type:

Default Value:

Field	Description
Row	Enter the row number for the position of the field. Row one will be the first field, row two will be located under the first field, and so on. Note: Custom fields for an asset type will display below any global custom asset fields. For information on global custom fields for assets, see "Setting Up Global Custom Fields for Assets" on page 147 .
Label	Enter the label for the custom field.
Required	Select Yes to require the field to be completed before the record can be saved.
Type	<p>Select the type of field to be included:</p> <ul style="list-style-type: none"> ■ Check box (enables multiple selections) ■ Currency (dollar sign displayed next to field and allows the numbers 0 through 9, a decimal point, and two values after the decimal point). See "Changing the Currency Custom Field Symbol" on page 193 for information on changing the dollar sign symbol. ■ Date (MM/DD/YY) ■ Date Time (MM/DD/YY; a time can be entered in the field). Manual entry in date time fields can be disabled, requiring the user to click the  icon. See "Disabling Manual Entries in Date Time Fields" on page 290. ■ Hyperlink (you can specify default text and a URL to appear in the field (the user can change those entries), or you can leave the field blank and allow the user to enter the default text and URL. ■ Multiple selection list box ■ Number only (allows the numbers 0 through 9 and a decimal point) ■ Radio button (enables only one selection) ■ Single selection drop-down ■ Text area ■ Text field

Field	Description
The types of fields are shown below.	
Check box	Method of Payment: <input checked="" type="checkbox"/> Visa <input type="checkbox"/> American Express <input type="checkbox"/> Cash
Radio button	Security Code Required: <input checked="" type="radio"/> Yes <input type="radio"/> No
Text area	Cubicle Location: Third cubicle down, on the right side of Accounting
Text field	Security Code: BR549
Single selection drop-down	Physical Location of CPU: Under desk
Date field	Service Date: 9/12/2008
Date/Time field	Date/Time Issue First Noticed: 9/12/2008 01:16 PM
Multiple selection list box	Training Taken: <ul style="list-style-type: none"> Company Orientation Intro to PCs Using Microsoft Word Computer Hardware Maintenance
Hyperlink	For More Information: GWI's Web Site Edit
Currency only	Expense: \$ 50.88
Number only	Number of Users Affected: 5

Options	This field displays when creating a radio button, checkbox, or multiple selection list box, or single selection drop-down. Enter a list of items for a support representative to choose from when completing this field. Separate each value with a comma or a return.
Default Value	Enter a value to appear as an option in the custom field by default.

To delete a custom field, click the row number and then click the Delete link. To delete multiple custom fields, select the fields and click the Delete link.

To edit a custom field, click the label link.

Entering Maintenance and Warranty Defaults

Use the Maintenance/Warranty tab to set up notifications for maintenance and warranty expiration dates.

Configuration > Asset Management > Types

Basics **Maintenance/Warranty** Custom Notifications

Track Maintenance Information: Yes No

Who to Notify of Maintenance Expiration: Owner Other

Email Addresses of Other Recipients:

Number of Days After Asset Creation to Default Maintenance Expiration Date:

Number of Days Prior to Maintenance Expiration to Send Reminder:

Track Warranty Information: Yes No

Who to Notify of Warranty Expiration: Owner Other

Email Addresses of Other Recipients:

Number of Days After Asset Creation to Default Warranty Expiration Date:

Number of Days Prior to Warranty Expiration to Send Reminder:

Field	Description
Track Maintenance Information	Select Yes to enable maintenance notification functionality, which sends notifications when a maintenance expiration date is near.
Who to Notify of Maintenance Expiration Email Addresses of Other Recipients	<p>If tracking maintenance information, select the person to whom the maintenance expiration reminder email should be sent.</p> <ul style="list-style-type: none"> ■ Select Owner to send the maintenance reminder email to the owner assigned to the asset (in the Asset entry screen). The notification will contain asset details (for example, the name, type, and expiration date.) ■ Select Other to send the maintenance expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person. The notification will contain a link to the asset record.
Number of Days After Asset Creation to Default Maintenance Expiration Date	Enter the number of days after the asset record is created to display as default for the maintenance expiration date.

Field	Description
Number of Days Prior to Maintenance Expiration to Send Reminder	Enter the number of days before the expiration date in which the maintenance notification should be sent.
Track Warranty Information	Select Yes to enable warranty notification functionality, which sends notifications when a warranty expiration date is near.
Who to Notify of Warranty Expiration Email Addresses of Other Recipients	<p>If tracking warranty information, select the person to whom the warranty expiration reminder email should be sent.</p> <ul style="list-style-type: none"> ■ Select Owner to send the warranty reminder email to the owner assigned to the asset (in the Asset entry screen). ■ Select Other to send the warranty expiration reminder to someone other than the owner. In the Email Addresses of Other Recipients field, enter the email address of this person.
Number of Days After Asset Creation to Default Warranty Expiration Date	Enter the number of days after the asset record is created to display as default for the warranty expiration date.
Number of Days Prior to Warranty Expiration to Send Reminder	Enter the number of days before the expiration date in which the warranty notification should be sent.

Scheduling the Asset Reminder Agent

If you enabled maintenance and/or warranty expiration functionality, enable the Asset Reminder agent on the Miscellaneous tab in the Agent Configuration screen. For more information, see [“Scheduling and Running Agents” on page 176](#).

Customizing Notifications for Asset Events

Email notifications include standard system messages, which are listed in [“Appendix I: Standard System Messages for Notifications” on page 867](#). To customize a notification, first create a custom notification via the Asset Custom Notifications link under Custom Notifications in the

Configuration module. Note that standard system notifications will be sent to any recipients that are specified in the Asset Type screen but are not specified on a custom notification.

Configuration > Notifications > Asset Custom Notifications

Delivery Priority: Low Normal High

Subject: Include Attachment(s) from Asset

Body | Attachments

Notification Message: Include Field

Rich text editor toolbar: ABC, Print, Undo, Redo, Bold, Italic, Underline, Link, Unlink, Image, Video, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Undo, Redo.

Font: Tahoma | Size: 2 | Style: Normal | Color: A

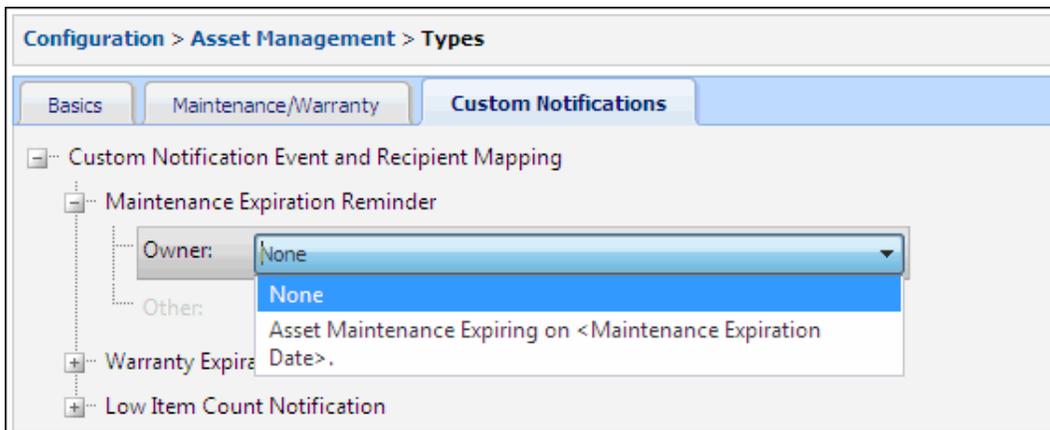
The maintenance contract for the following asset is set to expire on <Maintenance Expiration Date>.

Asset Details
 Name: <Asset Name>
 Type: <Asset Type>
 Manufacturer: <Manufacturer>
 Model: <Model>
 Purchase Date: <Asset Purchase Date>

Field	Description
Delivery Priority	Select the priority level to assign to the email: <ul style="list-style-type: none"> ■ High ■ Normal ■ Low

Field	Description
<p>Subject</p> <p>Notification Message</p>	<p>In the Subject field, enter the subject line for the email notification.</p> <p>On the Body tab, enter the body of the email notification. You can click the Notification Message link to display a larger window for entry.</p> <p>In both fields, you can use the Include Field link to add values from the asset. Place the cursor where the data is to be inserted and click the Include Field link. The following dialog appears; select the field to insert.</p> <div data-bbox="711 470 1208 1352" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Select Field to Include</p> <p>Current Date</p> <p>Asset</p> <p>URL to Desktop Asset</p> <p>Custom Fields</p> <p>Asset Type Custom Fields</p> <p>Monitor</p> <p>Asset Age</p> <p>Version</p> <p>Details</p> <p>Associated Configuration Item</p> <p>Audit History</p> <p>Comments</p> <p>Company</p> <p>Location</p> <p>Maintenance Expiration Date</p> <p>Manufacturer</p> <p>Model</p> <p>Name</p> <p>Owners</p> <p>Used Count</p> <p>Unit Label</p> <p>Unit Cost</p> <p>Unit List Price</p> <p>Purchase Date</p> <p>Serial Number</p> <p>Service Contracts</p> <p>Source</p> <p>Tag Number</p> <p>Type</p> <p>Warranty Expiration Date</p> </div> <p>When the event occurs, the selected field data will be inserted into the email.</p>
<p>Include Attachment(s) from Asset</p>	<p>Select this checkbox to associate any attachments from the referenced configuration item to the notification when it is sent.</p>
<p>Attachments</p>	<p>Use the Attachments tab to attach a specific file to be sent with the notification.</p>

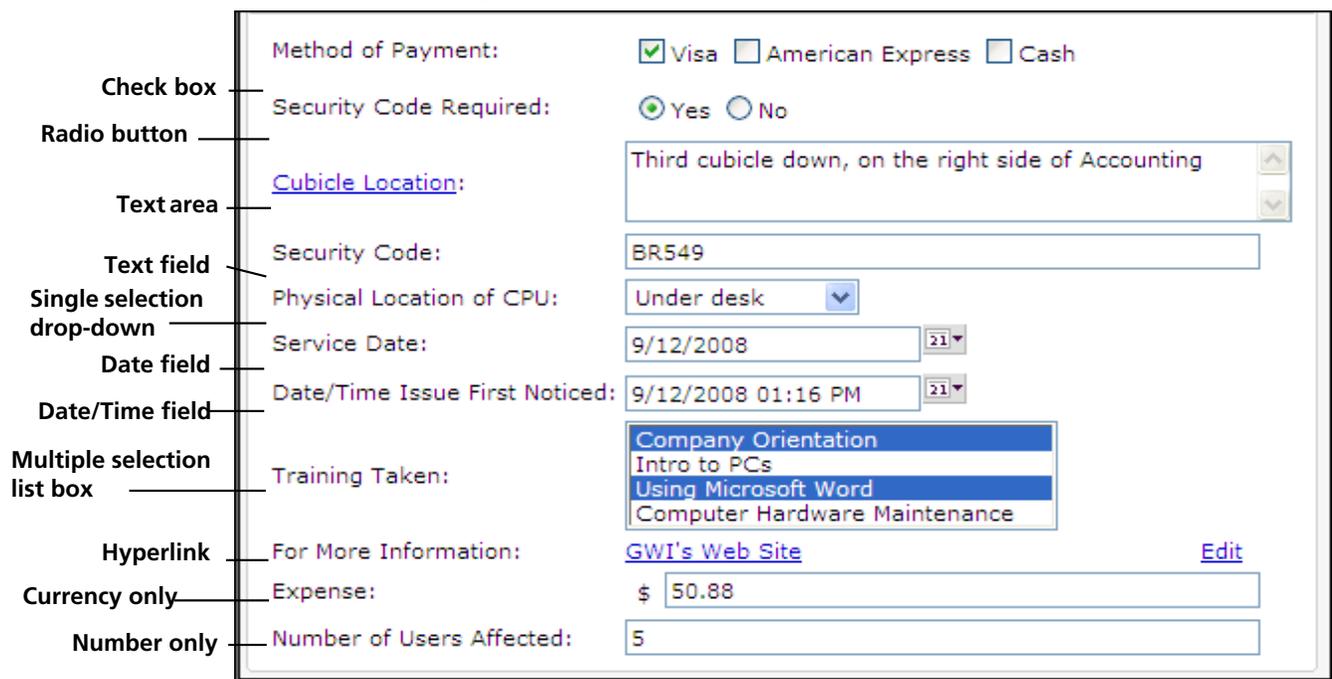
After creating the custom notification, select it for the applicable event and recipient on the Custom Notifications tab in the Types screen.



Setting Up Global Custom Fields for Assets

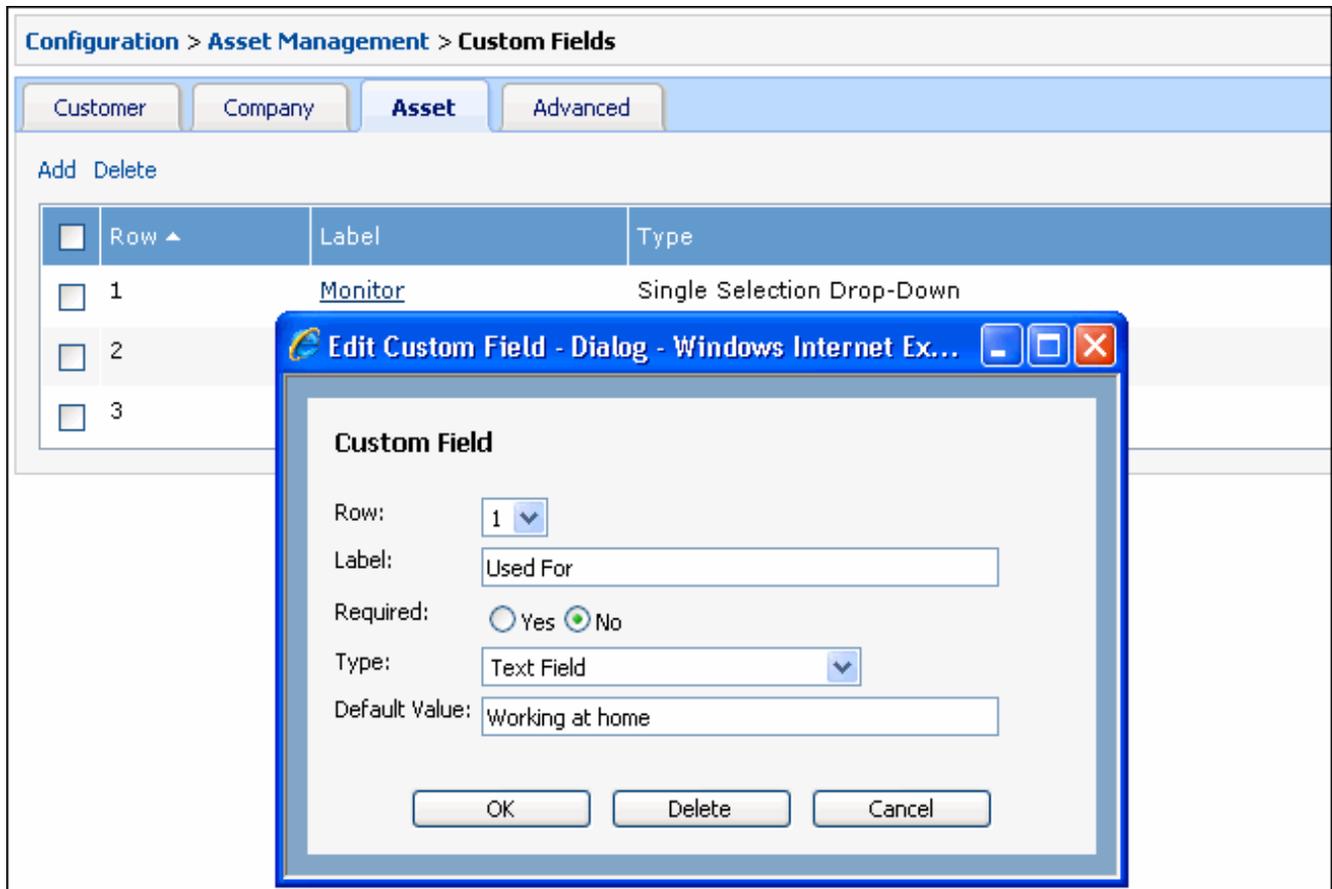
Use the Custom Fields screen to set up text, keyword, and date format fields for the Custom Fields section in the Asset screen.

For each field, you can set it up so that the field must be completed before the record can be saved. You can set up the following types of fields:



To access the Custom Fields screen, select Asset Management | Custom Fields on the Configuration menu.

To set up a field, select the Asset tab and then click the Add link.



Field	Description
Row	Enter the row number for the position of the field. Row one will be the first field in the section, row two will be located under the first field, and so on.
Label	Enter the label for the field.
Required	Select Yes to require the field to be completed before the record can be saved.

Field	Description
Type	<p>Select the type of field to be included:</p> <ul style="list-style-type: none"> ■ Check box (allows multiple selections) ■ Currency (dollar sign displayed next to field and allows the numbers 0 through 9, a decimal point, and two values after the decimal point). See “Changing the Currency Custom Field Symbol” on page 193 for information on changing the dollar sign symbol. ■ Date (MM/DD/YY) ■ Date (MM/DD/YY) Time Manual entry in date time fields can be disabled, requiring the user to click the  icon. See “Disabling Manual Entries in Date Time Fields” on page 290. ■ Hyperlink (you can specify default text and a URL to appear in the field (the user can change those entries), or you can leave the field blank and allow the user to enter the default text and URL. ■ Multiple selection list box ■ Number only (allows the numbers 0 through 9 and a decimal point) ■ Radio button (allows only one selection) ■ Single selection drop-down ■ Text area ■ Text field
Options	<p>If setting up a radio button, checkbox, multi-select, or single-select field, enter a list of items for a support representative to choose from when completing this field. Separate each value with a comma or a return.</p>
Default Value	<p>Enter a value to appear as an option in the custom field by default.</p>

Creating Asset Groups

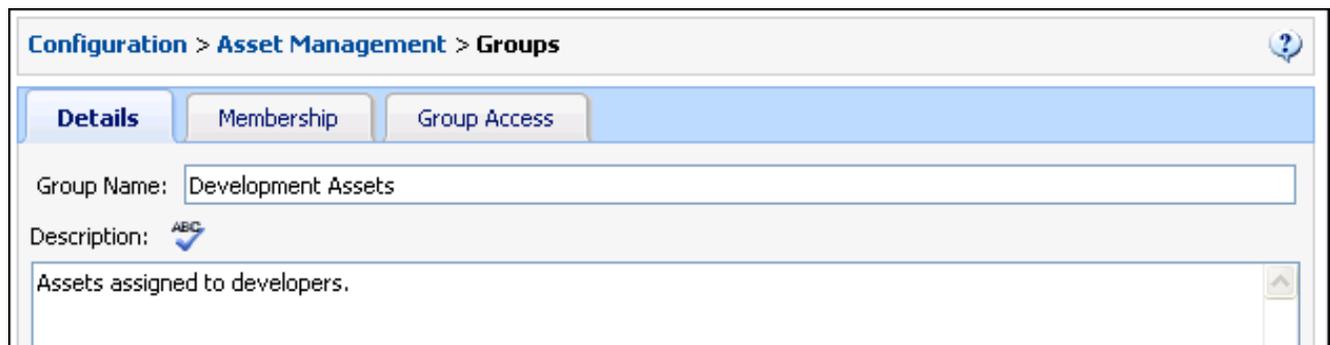
Asset groups enable you to associate a collection of assets for access, viewing, and reporting. You can assign assets to a group via the Asset Group screen and the Desktop. To create a group, select Asset Management | Groups on the Configuration menu.



The screenshot shows the 'Configuration > Asset Management > Groups' interface. It has three tabs: 'Support Representative', 'Customer', and 'Asset'. Below the tabs are 'Create' and 'Delete' links. A table lists existing groups:

<input type="checkbox"/>	Group ▲	Description	Company Members
<input type="checkbox"/>	Administrative Assets	Assets assigned to administrative users.	5
<input type="checkbox"/>	Technical Assets	Assets assigned to technical staff.	1

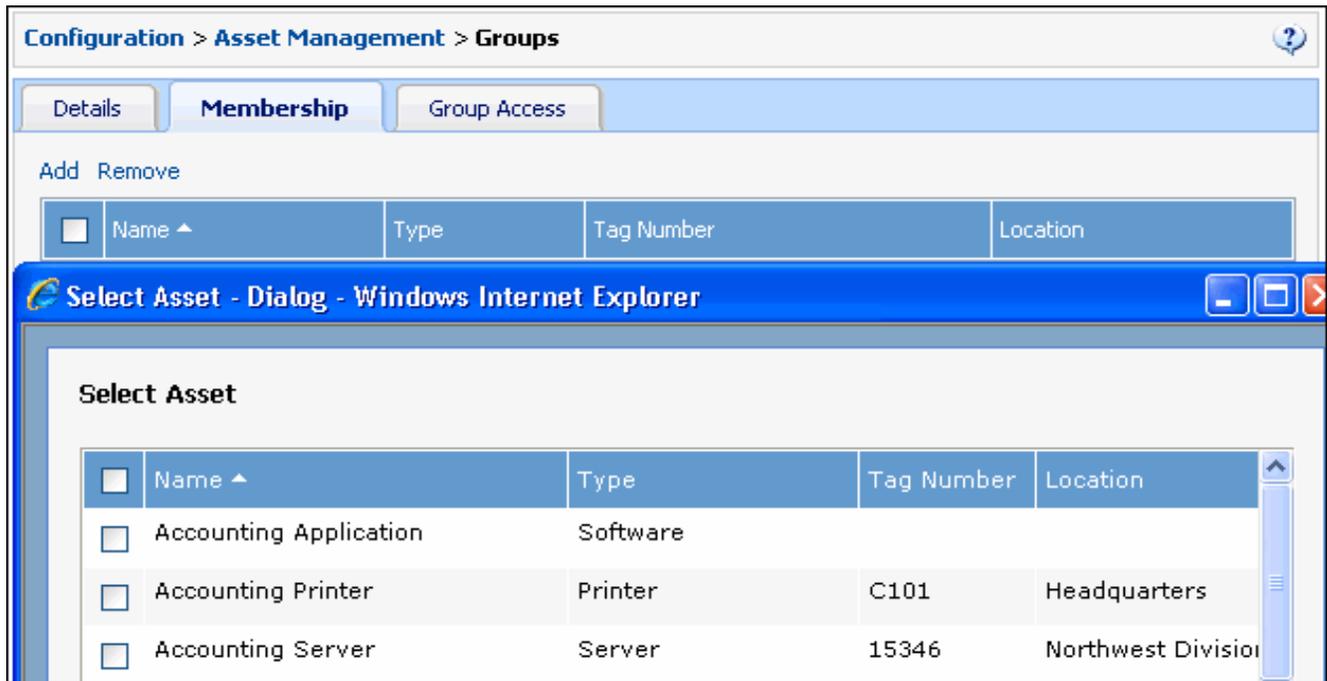
The following screen appears; enter the name and description of the group on the Details tab.



The screenshot shows the 'Configuration > Asset Management > Groups' interface with the 'Details' tab selected. The 'Group Name' field contains 'Development Assets' and the 'Description' field contains 'Assets assigned to developers.' There is a small 'ABC' icon and a checkmark next to the description field.

Adding Assets to Asset Groups

Use the Membership tab to add selected assets to a group.



The screenshot displays the 'Configuration > Asset Management > Groups' interface. The 'Membership' tab is active, showing a table with columns for Name, Type, Tag Number, and Location. Below this, a 'Select Asset' dialog box is open, listing three assets for selection:

<input type="checkbox"/>	Name ▲	Type	Tag Number	Location
<input type="checkbox"/>	Accounting Application	Software		
<input type="checkbox"/>	Accounting Printer	Printer	C101	Headquarters
<input type="checkbox"/>	Accounting Server	Server	15346	Northwest Division

To add an asset to the group, click the Add link. Select an existing asset and click OK.

Restricting Access

Use the Group Access tab to restrict access to assets in the group to members of support representative groups. 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. Click the Add link to select the groups. After saving, assets in the group will be available only to members of the selected support representative groups.

Configuration > Asset Management > Groups

Details Membership **Group Access**

Restricted to the following groups:
Add Remove

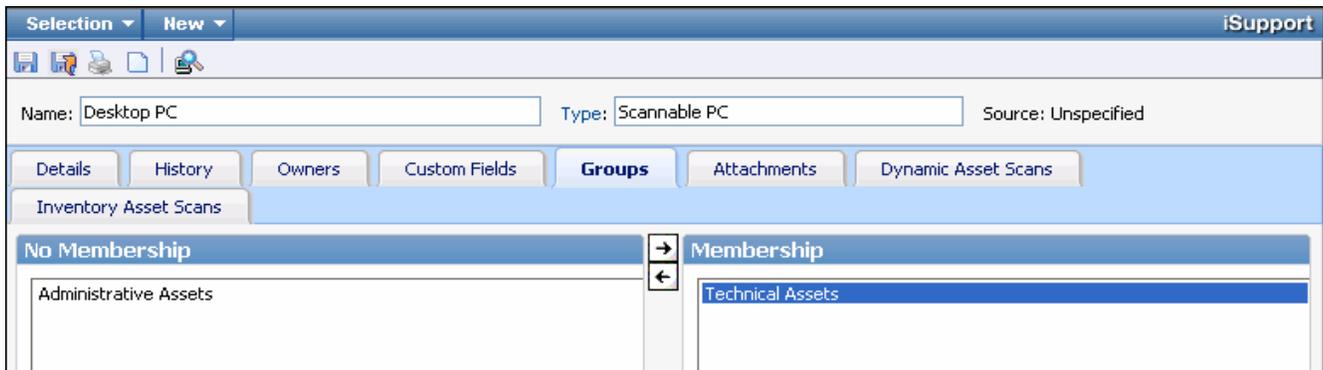
Add Group Access

Select Support Rep Groups:

<input type="checkbox"/>	Name ▲	Description
<input checked="" type="checkbox"/>	Administrators	Administrators group created during application install.
<input checked="" type="checkbox"/>	Applications	Applications Group

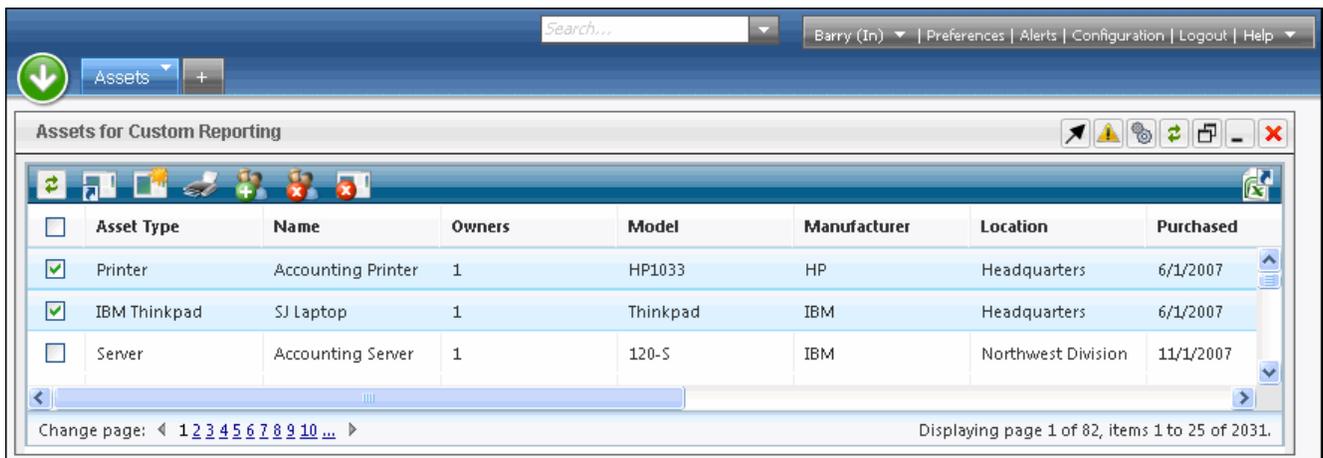
Adding Assets to Groups via the Asset Screen

You can add an asset to a group when you create an asset record via the Asset screen. In the Groups section, select a predefined group in the No Membership field and click the right arrow to move the group to the Membership field.



Adding Assets to Groups via the Desktop

You can add selected assets to a group and remove selected assets from a group via the Desktop. Select the assets via an asset view and then click the Add to Group  and Remove From Group  icons.



Setting Up Inventory Scans

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 and end time. You can specify a range of IP addresses, domain names, or an Active Directory path to be scanned. You can also initiate an inventory scan from this screen. Inventory scans run on the server on which iSupport Asset is installed.

To access the Inventory Scan Definition screen, select Asset Management | Inventory Scan Definitions on the Configuration menu. Then click the Create link. On the Basics tab, you'll specify the schedule and type of scan; on the second tab, you'll enter specifics depending on the type of scan. When finished, click the Save button or the Scan button to save the definition and initiate the scan.

The screenshot shows the 'Inventory Scan Definitions' configuration window. The 'Basics' tab is selected. The form includes the following fields and options:

- Scan Name:** Full System Scan
- Scan Type:** IP Scan
- Start Time:** 12:00 AM
- Duration:** 2 Hour(s)
- Scan Enabled:** Yes (selected)
- Scan On Weekends:** Yes (selected)
- Frequency:** Daily
- Occurs On:** (Empty text area)
- Email Addresses to Notify Upon Scan Completion:** sj@lblsoft.com
- Impersonate WMI Authentication:** Yes (selected)
- Name:** administrator
- Password:** (Masked with dots)
- SNMP Community:** public
- Enable Auto Asset Create from Inventory Scan Agent:** Yes (selected)
- Asset Record Template for Automatic Asset Creation:** Accounting Server
- Populate Asset Serial Number Field with OS Serial Number:** Yes (selected)
- Last Run:** (Empty field)

Field	Description
Scan Name	Enter a name describing the settings in the scan definition.

Field	Description
Scan Type	<p>Select the type of scan:</p> <ul style="list-style-type: none"> ■ A IP Scan searches based on a specified range of IP addresses. (You can exclude specified IP addresses.) ■ An AD Scan searches based on a specified Active Directory path. You can scan all machine names known by the domain controller, or scan using an LDAP query for returning a specific set of information. ■ A DNS Scan searches based on specified domain names.
Scan Enabled	Select Yes to allow scans to initiate based on the defined schedule and setting; otherwise, select No to prevent the scan from occurring.
Frequency	<p>Select one of the following:</p> <ul style="list-style-type: none"> ■ Daily to run the scan every day at the time designated in the Start Time field. ■ Weekly to run the scan once a week on the day designated in the Occurs On field. ■ Monthly to run the scan every month on the day designated in the Occurs On field.
Start Time	Select the time at which the scan should be initiated.
Duration	Enter the amount of time (in hours) at which, if the scan is still running, the scan should be terminated.
Scan On Weekends	This field is enabled if Daily or Monthly is selected in the Frequency field. Select Yes to schedule the scan to run on Saturdays and Sundays.
Occurs On	<p>This field is enabled if Weekly or Monthly is selected in the Frequency field.</p> <ul style="list-style-type: none"> ■ If Weekly is selected in the Frequency field, select the day of the week on which the scan should run. The scan will run every week on the selected day. ■ If Monthly is selected in the Frequency field, select the day on which the scan should run. The scan will run every month on the selected day. <p>To select more than one entry, click on entries while holding down the Control key. Use the Shift key to select a range.</p>
Email Addresses to Notify Upon Scan Completion	Enter the email addresses to which an automatic notification should be sent when the scan completes. The notification will contain the scan definition name and the time and date of completion.

Field	Description
Scan Type	<p>Select the type of scan:</p> <ul style="list-style-type: none"> ■ A IP Scan searches based on a specified range of IP addresses. (You can exclude specified IP addresses.) ■ An AD Scan searches based on a specified Active Directory path. You can scan all machine names known by the domain controller, or scan using an LDAP query for returning a specific set of information. ■ A DNS Scan searches based on specified domain names.
Scan Enabled	<p>Select Yes to allow scans to initiate based on the defined schedule and setting; otherwise, select No to prevent the scan from occurring.</p>
Frequency	<p>Select one of the following:</p> <ul style="list-style-type: none"> ■ Daily to run the scan every day at the time designated in the Start Time field. ■ Weekly to run the scan once a week on the day designated in the Occurs On field. ■ Monthly to run the scan every month on the day designated in the Occurs On field.
Start Time	<p>Select the time at which the scan should be initiated.</p>
Duration	<p>Enter the amount of time (in hours) at which, if the scan is still running, the scan should be terminated.</p>
Scan On Weekends	<p>This field is enabled if Daily or Monthly is selected in the Frequency field. Select Yes to schedule the scan to run on Saturdays and Sundays.</p>
Occurs On	<p>This field is enabled if Weekly or Monthly is selected in the Frequency field.</p> <ul style="list-style-type: none"> ■ If Weekly is selected in the Frequency field, select the day of the week on which the scan should run. The scan will run every week on the selected day. ■ If Monthly is selected in the Frequency field, select the day on which the scan should run. The scan will run every month on the selected day. <p>To select more than one entry, click on entries while holding down the Control key. Use the Shift key to select a range.</p>
Email Addresses to Notify Upon Scan Completion	<p>Enter the email addresses to which an automatic notification should be sent when the scan completes. The notification will contain the scan definition name and the time and date of completion.</p>

Field	Description
Scan Type	<p>Select the type of scan:</p> <ul style="list-style-type: none"> ■ A IP Scan searches based on a specified range of IP addresses. (You can exclude specified IP addresses.) ■ An AD Scan searches based on a specified Active Directory path. You can scan all machine names known by the domain controller, or scan using an LDAP query for returning a specific set of information. ■ A DNS Scan searches based on specified domain names.
Scan Enabled	<p>Select Yes to allow scans to initiate based on the defined schedule and setting; otherwise, select No to prevent the scan from occurring.</p>
Frequency	<p>Select one of the following:</p> <ul style="list-style-type: none"> ■ Daily to run the scan every day at the time designated in the Start Time field. ■ Weekly to run the scan once a week on the day designated in the Occurs On field. ■ Monthly to run the scan every month on the day designated in the Occurs On field.
Start Time	<p>Select the time at which the scan should be initiated.</p>
Duration	<p>Enter the amount of time (in hours) at which, if the scan is still running, the scan should be terminated.</p>
Scan On Weekends	<p>This field is enabled if Daily or Monthly is selected in the Frequency field. Select Yes to schedule the scan to run on Saturdays and Sundays.</p>
Occurs On	<p>This field is enabled if Weekly or Monthly is selected in the Frequency field.</p> <ul style="list-style-type: none"> ■ If Weekly is selected in the Frequency field, select the day of the week on which the scan should run. The scan will run every week on the selected day. ■ If Monthly is selected in the Frequency field, select the day on which the scan should run. The scan will run every month on the selected day. <p>To select more than one entry, click on entries while holding down the Control key. Use the Shift key to select a range.</p>
Email Addresses to Notify Upon Scan Completion	<p>Enter the email addresses to which an automatic notification should be sent when the scan completes. The notification will contain the scan definition name and the time and date of completion.</p>

Field	Description
Impersonate WMI Authentication	<p>Select one of the following for the login to be used to access the systems included in the scan:</p> <ul style="list-style-type: none"> ■ Select No to use the login that is set up for the c.Support Agent Manager (the service used to process scans). <p>To view the login for the c.Support Agent Manager: from the Start menu, select Programs Administrative Tools Computer Management. Expand the Services and Applications section and select Services. Right-click on the c.Support Agent Manager service and select Properties. The Logon tab includes the login used by the c.Support Agent Manager.</p> <ul style="list-style-type: none"> ■ Select Yes to enter a different login to be used to access the systems included in the scan.
Name Password	Enter the login to be used to access the systems included in the scan.
SNMP Community	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".
Enable Auto Asset Create from Inventory Scan Agent	Select Yes to enable the Auto Asset Create from Inventory Scan agent which creates Asset records automatically for machines that are involved in inventory scans but not associated with an existing record. (You can also enable this agent in the Agents screen.)
Asset Record Template for Automatic Asset Creation	Click this link to select the name of an existing Asset record to use as a template when the Auto Asset Create from Inventory Scan agent is run. The record's asset type will determine the fields that will appear on the automatically-created record. See "Creating Asset Records Automatically Based on Inventory Scans" on page 164 for a table listing how the fields are populated.
Populate Asset Serial Number Field With OS Serial Number	Select Yes to populate the Asset Serial Number field with the operating system serial number when Asset records are created automatically for machines that are involved in inventory scans but not associated with an existing record.

Specifying IP Settings

If IP Scan is selected in the Scan Type field, the IP Settings tab appears as shown in the example below.

The screenshot shows a web interface for configuring inventory scan definitions. The breadcrumb path is "Configuration > Asset Management > Inventory Scan Definitions". There are three tabs: "Basics", "IP Settings" (which is active), and "Components to Scan".

The "IP Settings" tab is divided into two main sections: "Included IP Address Ranges" and "Excluded IP Address Ranges".

Each section has two input fields: "Start Address:" and "End Address:". Below these fields are three icons: a downward arrow (to add a range), an upward arrow (to move a range), and a red 'X' (to delete a range).

Under the "Included IP Address Ranges" section, there is a list box containing one entry: "10.16.1.101 - 10.16.1.147".

Under the "Excluded IP Address Ranges" section, there is a list box containing one entry: "10.16.1.145 - 10.16.1.145".

Use the Included IP Address Ranges fields to enter the IP addresses of the systems to be scanned.

Use the Excluded IP Address Ranges fields to enter the IP addresses of the systems that should not be scanned.

To enter an IP Address range, enter the first IP address in the range in the Start Address field and the last IP address in the range in the End Address field, and then click the icon to move the IP range into the list. To move a range out of the list, click the icon. To delete a range from the list, click the icon.

Specifying AD Scan Settings

If AD Scan is selected in the Scan Type field, the AD Settings tab appears. You can specify the scan to:

- Scan all machine names known by the domain controller

- Scan using an LDAP query for locating a specific set of machines. An example is shown below.

Configuration > Asset Management > Inventory Scan Definitions

Basics **AD Settings** Components to Scan

AD Path: LDAP://LBLSOFT-AD

Scan Using Query Scan All Machines

LDAP Query:

(&(objectCategory=computer)(cn=SALES*))

Impersonate AD Authentication: Yes No

Name: LBLSOFT\Administrator

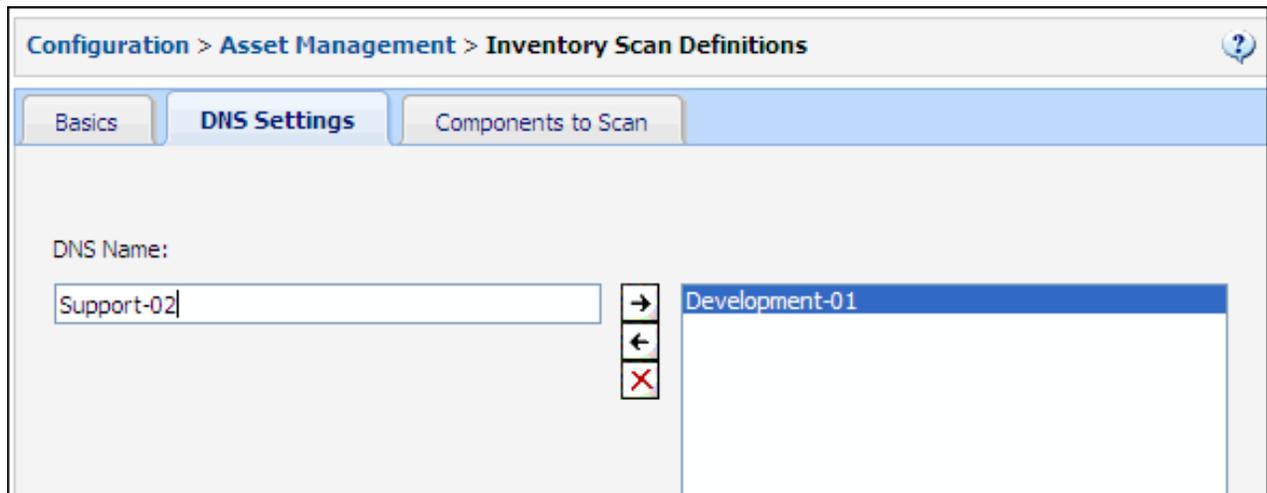
Password: ●●●●●●●●

Field	Description
AD Path	Enter the path for the Active Directory to be scanned.
Scan Using Query LDAP Query	Select this field to use an LDAP query for locating a specific set of machines. LDAP (Light Weight Directory Access Protocol) defines how information can be accessed in directories. In the example on the previous page, the query locates all machine names known by the domain controller that begin with "SALES". Active Directory supports the LDAP search filter syntax as specified in RFC 1960. For information on LDAP and search filters, see http://www.microsoft.com/windows2000/docs/uldap.doc .
Scan All Machines	Select this field to scan all machine names known by the domain controller.

Field	Description
Impersonate AD Authentication	Select one of the following for the login to be used to access systems in the specified Active Directory:
Name	<ul style="list-style-type: none"> Select No to use the login set up for the c.Support Agent Manager (the service used to process scans). To view the login for the c.Support Agent Manager: from the Start menu, select Programs Administrative Tools Computer Management. Expand the Services and Applications section and select Services. Right-click on the c.Support Agent Manager service and select Properties. The Logon tab includes the login used by the c.Support Agent Manager. Select Yes to enter a different login to be used to access the systems in the specified Active Directory.
Password	

Specifying DNS Settings

If DNS Scan is selected in the Scan Type field, the DNS Settings tab appears.

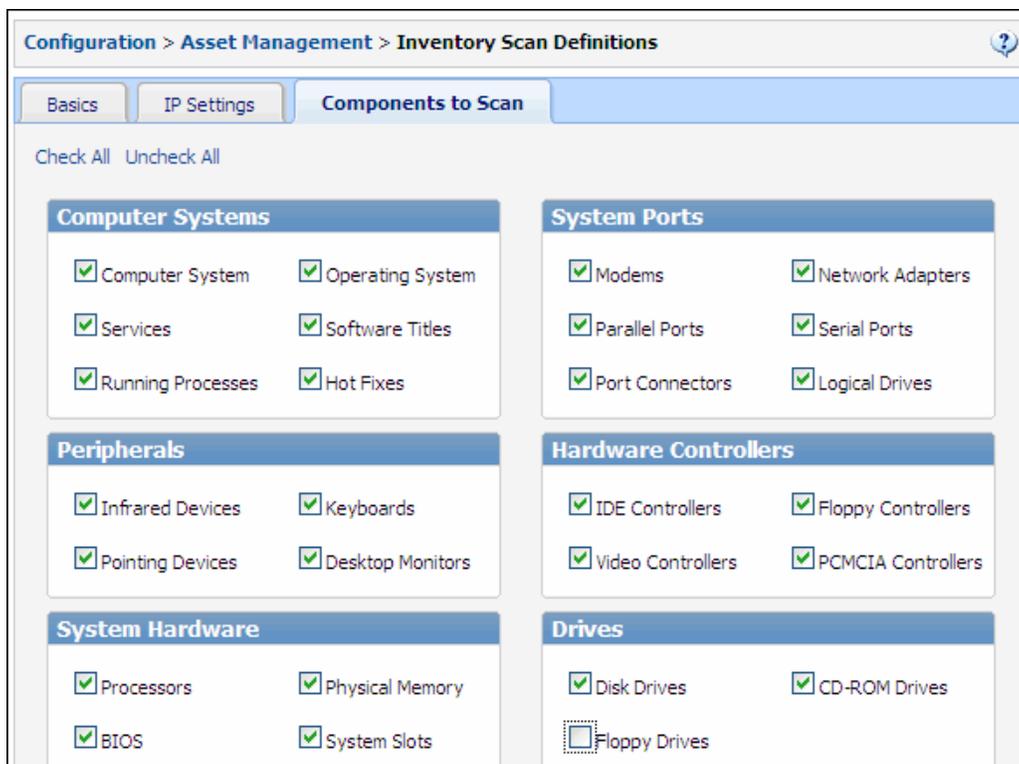


Use the DNS Name field to enter the domain names of the systems to be scanned. Wildcards are not allowed. Enter a domain name in the field on the left and click the  icon to enter it on the field on the right. To remove a domain name from the field on the right, select the name and click the  icon. To delete a domain name from the field on the right, click the  icon.

Selecting Components to Scan

Select the types of data to include in the scan. To select all checkboxes in a section, use the  icon; to clear the checkboxes in a section, use the  icon. Use the Uncheck All and Check All links

for all checkboxes.



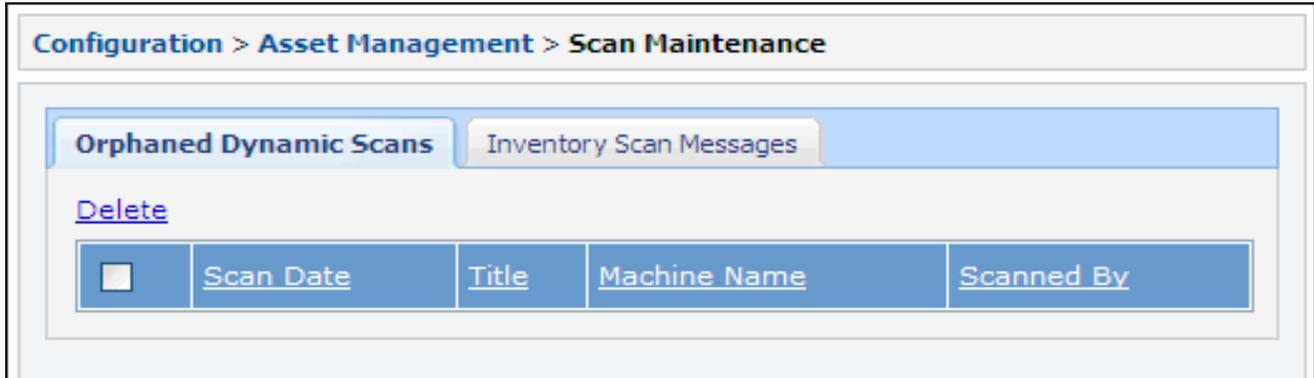
If using iSupport Asset's asset scanning features in a domain with a Windows 2003 domain controller, see ["Changing iSupport Asset's Access to SQL Databases"](#) on page 241 for information on integrating the security context of Windows Server 2003 Active Directory with the domain on which iSupport Asset resides.

Scheduling the Asset Inventory Scan Agent

After entering an inventory scan definition, enable the Asset Inventory Scan agent on the Basics tab in the Agent Configuration screen. For more information, see ["Scheduling and Running Agents"](#) on page 176.

Viewing Orphaned Dynamic Scans

The Orphaned Dynamic Scans tab in the Scan Maintenance screen contains a list of dynamic scans that have been associated with an asset, but the asset's asset type changed to non-scannable.

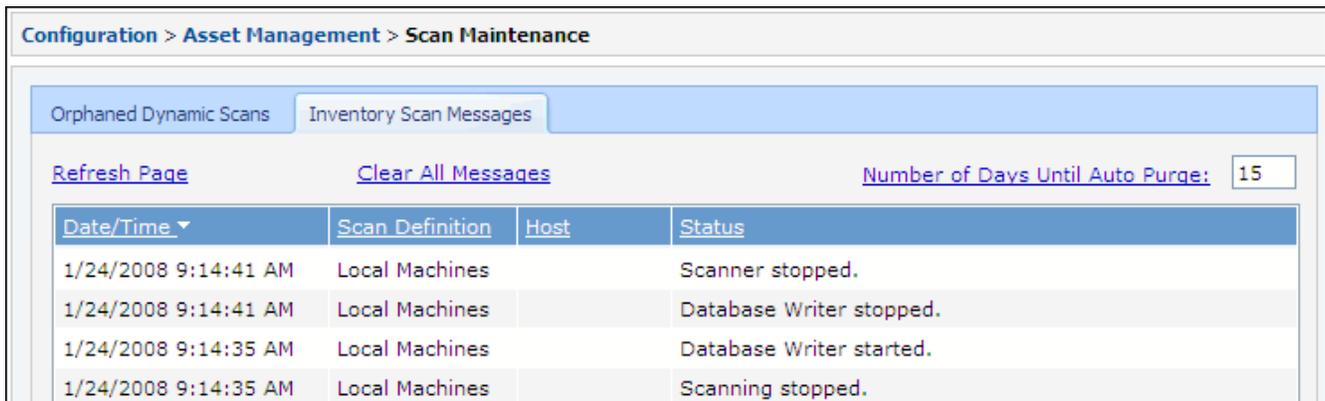


To delete these scans, select the checkbox next to the scan and click the Delete link.

Viewing Inventory Scan Messages

The Inventory Scan Messages tab in the Scan Maintenance screen contains messages regarding the progress of scans run using inventory scan definitions. This includes:

- Errors that occur while retrieving or saving the data.
- Details regarding the machines included in the range to be scanned, and the machines that were unreachable.
- Status information such as when the scan was started and stopped.



Use the Number of Days Until Auto Purge field to specify a number of days after which messages will be deleted automatically by the Database Maintenance agent. For information on scheduling the Database Maintenance agent, see ["Generating Diagnosis Reports" on page 181](#).



These messages are stored in the cAsset database and can accumulate quickly. It is important to use the **Clear All Messages** link or the Number of Days Until Auto Purge field to maintain the size of the stored data.

You can use the cSupport Event Log and **Microsoft® Windows Event Viewer** to view application errors and log entries regarding the c.Support Agent Manager. **It's important to check the size of the Microsoft Windows Event Viewer and increase it if necessary.**

To access the Microsoft Windows Event Viewer, on the Windows Desktop, go to Start | Programs | Administrative Tools | Event Viewer | cSupport. Right-click on cSupport in the left pane and select Properties. In the cSupport Properties dialog, make adjustments in the fields in the Log Size section.

Creating Asset Records Automatically Based on Inventory Scans

Assets can be created automatically for machines that are involved in inventory scans but not associated with an existing record. To do this, you'll need to do the following:

- 1 Create or find an asset record to be used as a template for creating records. The asset type in the template record will determine the fields that will appear on the automatically-created record; for example, if the Owner field is not set up for the asset type, it will not appear in the auto-created record. The fields are populated as shown below.

Field	Populated With
Asset Name	The machine name in the inventory scan. If an asset name already exists with the machine name, a numeric value will be appended to it.
Asset Type	The contents of the Asset Type field in the asset record used as a template
Owner	The contents of the Owner field in the Asset record used as a template
Model	Determined from inventory scan results
Manufacturer	Determined from inventory scan results
Tag Number	Blank
Serial Number	Blank unless determined from inventory scan results. You can populate this field with the operating system serial number by selecting the Populate Asset Serial Number Field with OS Serial Number option on the Asset tab in the Agents screen.
Location	The contents of the Location field in the Asset record used as a template
Purchase and Maintenance Expiration Dates	Blank

Field	Populated With
Comments	Blank
Custom Fields	The contents of the custom fields in the Asset record used as a template
Attachments	Blank
Dynamic Scans	Blank
Inventory Scan Association	The inventory scan for the machine that did not have an associated asset record

To distinguish automatically-created asset records after the records are created, you can create a global custom Asset field with "Auto-created" in the label; after the records are created, you can create a Desktop custom view containing that field.

- 2 Enable the Auto Asset Create from Inventory Scan agent, which will run every hour based on the time at which the c.Support Agent Manager service is started.

You can also execute the Auto Asset Create from Inventory Scan agent immediately via the Advanced tab in the Agent screen. A dialog will appear for selecting the Asset record to be used as a template for automatically creating records; this is a good method to use for control in building asset records for your inventory.

Importing and Synchronizing Asset Data

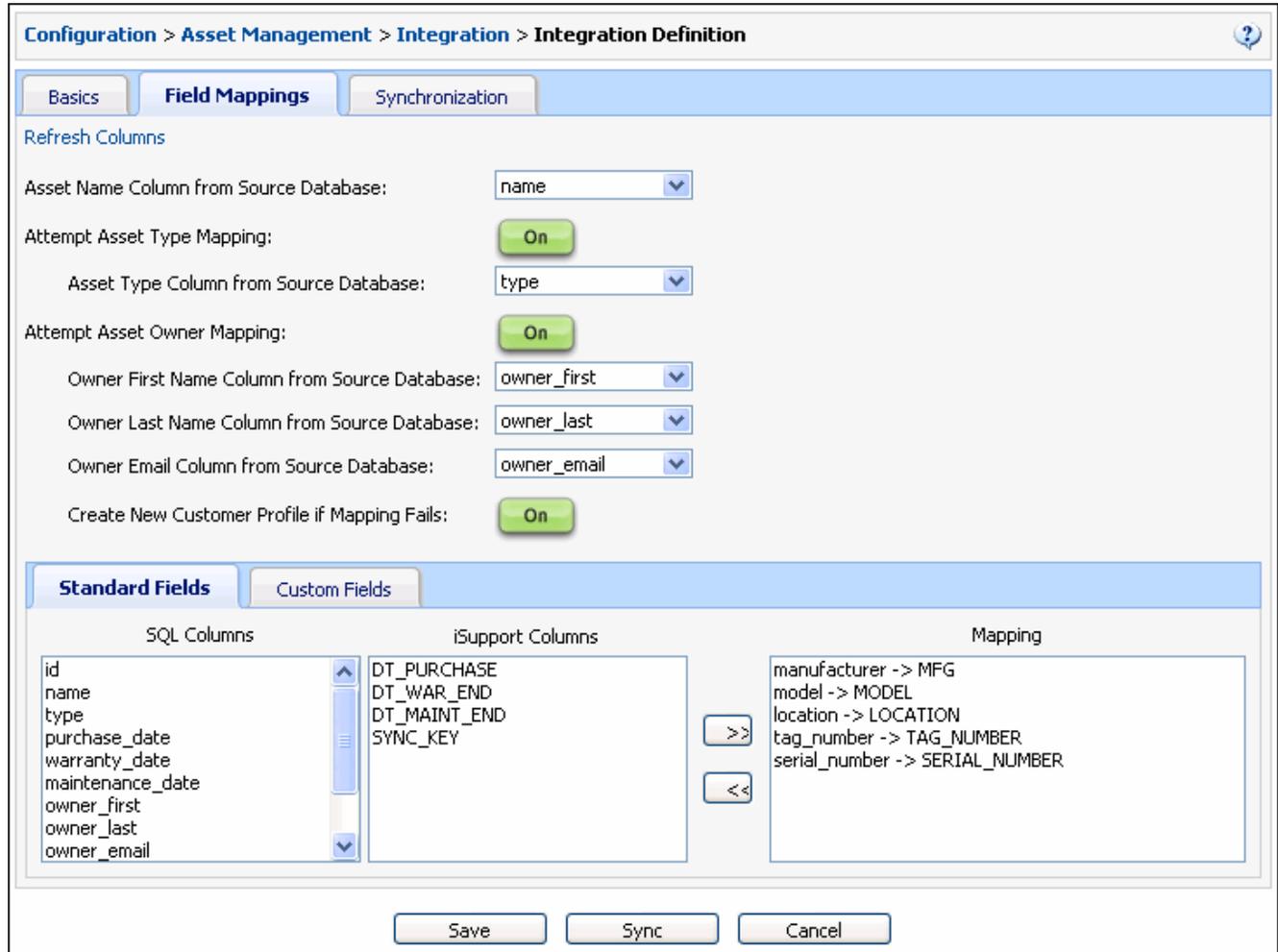
The Asset Integration feature enables you to import asset data from one or more Microsoft SQL Server source databases into iSupport Asset’s Asset database, and synchronize with those source databases on an interval basis. You’ll enter a connection string and SQL query, and then click the Test Query button to display columns in the source database on the Field Mappings tab for specific field mapping options. You can schedule synchronization to occur on an interval basis.

Select Asset Management | Integration on the Configuration menu to create an integration definition. Use the Basics tab to specify the connection string, SQL query, authentication information, and synchronization interval.

Field	Description
Microsoft SQL Server Source Name	Enter a name for the SQL Server source definition. This name will appear in the list of integration definitions and in the Source field in the associated Asset record.
Connection String	Enter the connection string for accessing the source database.
SQL Query	Enter the SQL query string for accessing the asset-specific SQL columns in the source database. Click the Test Query button to populate the SQL Columns field on the Field Mappings tab.
Authentication	Select the type of authentication to be used to access the source SQL Server database: Windows Authentication or SQL Server Authentication. If using SQL Server authentication, enter the user name and password for accessing the server.
Username	
Password	
Active	Select Yes to enable the Asset Synchronization agent that updates the records in the iSupport Asset database with the information in the SQL source database.
Asset Synchronization Interval	Select the number of minutes in the interval for the synchronization to be performed.

Specifying Field Mappings

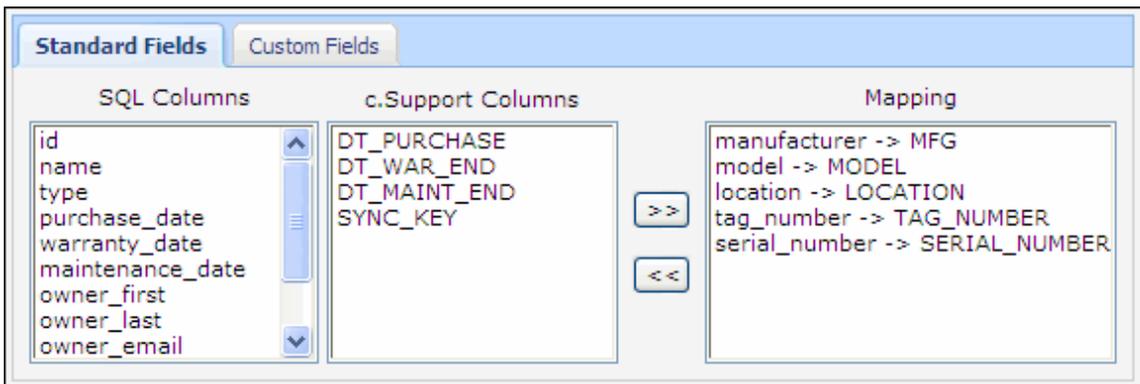
When the query connection is successful, use the Field Mappings tab to specify options for mapping the fields in the source database to the fields in the iSupport Asset database.



Field	Description
Asset Name Column from Source Database	Select the asset name column in the SQL database that contains the data to be synchronized.
Attempt Asset Type Mapping	<ul style="list-style-type: none"> Select On to specify the asset type column in the source database for mapping to the iSupport asset type column. If a value in the source database does not match the corresponding value a predefined type, a new type will be assigned. Select Off to assign the predefined iSupport asset type in the Default Asset Type field to all synchronized records.
Asset Type Column from Source Database	If On was selected in the Attempt Asset Type Mapping field, select the column to be used for mapping the asset type in the source database.

Field	Description
Default Asset Type	If Off was selected in the Attempt Asset Type Mapping field, select the predefined iSupport asset type to assign to all synchronized asset records.
Attempt Asset Owner Mapping	<ul style="list-style-type: none"> Select On to specify the names of the asset owner First Name, Last Name, and Email columns in the source database and search for a matching asset owner in iSupport Asset Customer Profiles. If a value in the source database does not match, a new Customer Profile record will be created if Yes is selected in the Create New Customer Profile if Mapping Fails field. If No is selected in that field, the customer in the Default Owner field will be assigned. Select Off to assign the customer in the Default Owner field as the asset owner of all synchronized records.
Owner First Name Column from Source Database	If On was selected in the Attempt Asset Owner Mapping field, select the owner first name column in the source database to be used in the search for a matching asset owner in iSupport Asset Customer Profiles.
Owner Last Name Column from Source Database	If On was selected in the Attempt Asset Owner Mapping field, select the owner last name column in the source database to be used in the search for a matching asset owner in iSupport Asset Customer Profiles.
Owner Email Column from Source Database	If On was selected in the Attempt Asset Owner Mapping field, select the owner email column in the source database to be used in the search for a matching asset owner in iSupport Asset Customer Profiles.
Create New Customer Profile if Mapping Fails	<ul style="list-style-type: none"> Select On to create a new Customer Profile record if a value in the source database does not match. Select Off to assign the customer in the Default Owner field as the asset owner of all imported records.
Default Owner	If no owner mapping was attempted or Off was selected in the Create New Customer Profile if Mapping Fails field, select the customer to assign as the asset owner for all imported records.

When you make an entry in the Connection String and SQL Query fields on the Basics tab and click the Test Query button or Refresh Columns link, the SQL Columns section will be populated with the names of the columns in the source database. The iSupport Columns field contains the columns in the iSupport's Asset database.



Do the following:

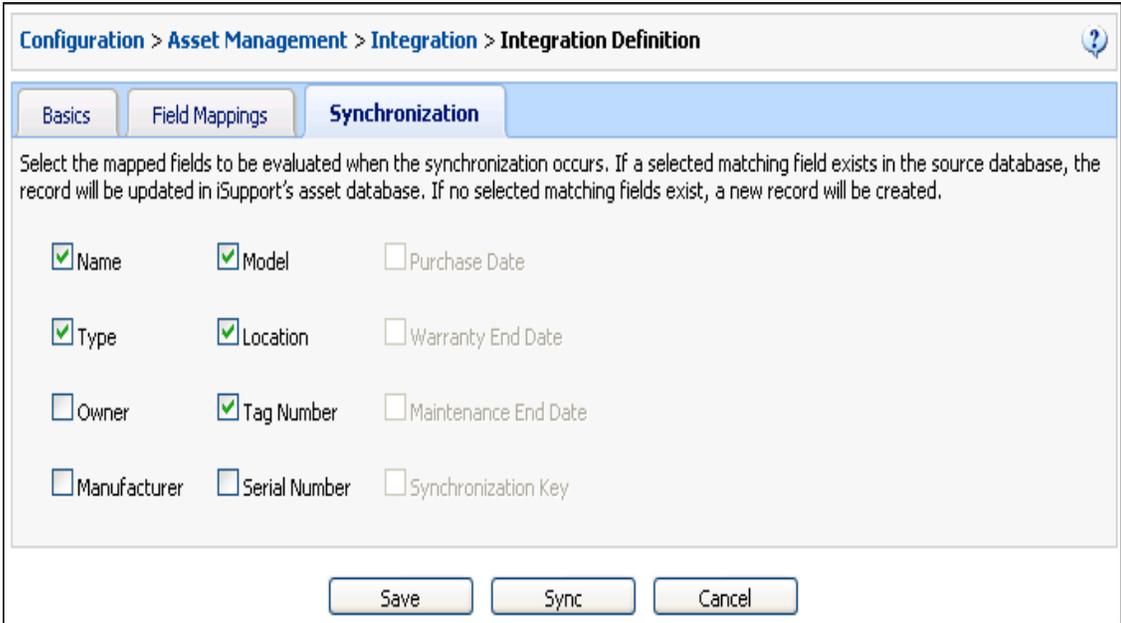
- To map a field, select a field in the SQL Columns field and the corresponding field in the iSupport Asset Columns field. Then click the  button. The associated fields display under Mapping.
- To remove an entry from the Mapping section, select the entry and click the  button.

Use the Custom Fields tab to map fields in the source database to the custom fields set up for both asset types and the Asset entry screen.

Click Save to save your selections. The synchronization will occur when the Sync button is clicked and/or on the interval set in the Asset Synchronization Interval field on the Basics tab.

Selecting Fields for Asset Synchronization

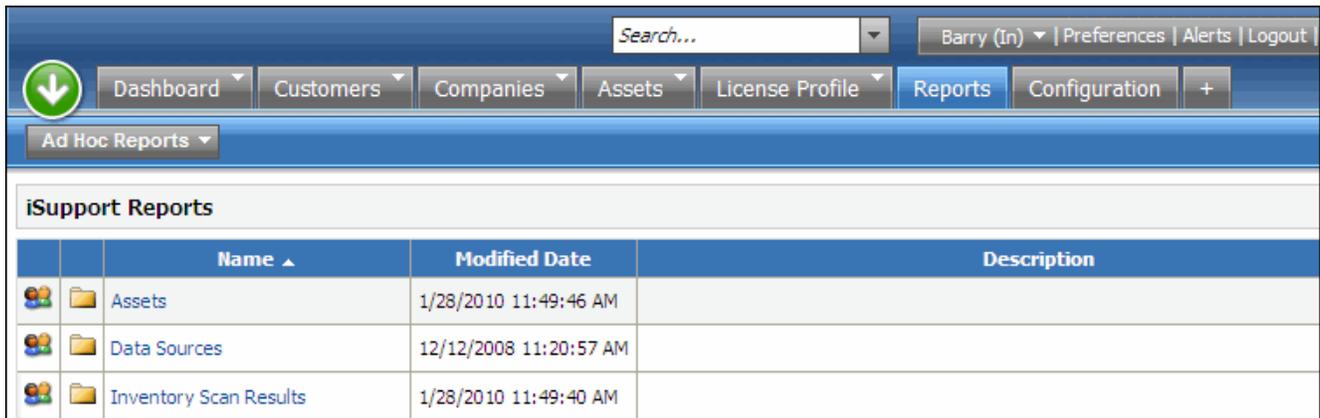
You can synchronize iSupport's Asset database with fields in a Microsoft SQL Server source database. Use the Synchronization tab to select the mapped fields to be evaluated when the synchronization occurs. If a matching field exists in the source database, the record will be updated in iSupport's Asset database.



The screenshot shows a software window titled "Configuration > Asset Management > Integration > Integration Definition". It has three tabs: "Basics", "Field Mappings", and "Synchronization", with "Synchronization" being the active tab. Below the tabs is a text instruction: "Select the mapped fields to be evaluated when the synchronization occurs. If a selected matching field exists in the source database, the record will be updated in iSupport's asset database. If no selected matching fields exist, a new record will be created." Below this instruction is a list of fields with checkboxes: Name (checked), Model (checked), Purchase Date (unchecked), Type (checked), Location (checked), Warranty End Date (unchecked), Owner (unchecked), Tag Number (checked), Maintenance End Date (unchecked), Manufacturer (unchecked), Serial Number (unchecked), and Synchronization Key (unchecked). At the bottom of the window are three buttons: "Save", "Sync", and "Cancel".

7 Generating 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.

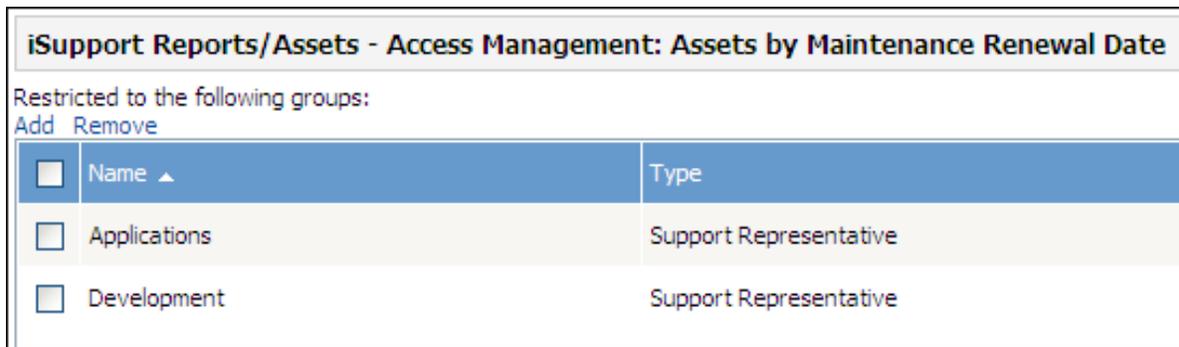


Viewing a Report

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.



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 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 Performing Miscellaneous Administrative Tasks

This chapter includes information on the following miscellaneous administrative tasks:

- Managing access to images. See [“Managing Access to Images” on page 173](#).
- Scheduling and running agents, which perform tasks in the background such as sending notifications. See [“Scheduling and Running Agents” on page 176](#).
- Generating configuration diagnosis reports. See [“Generating Diagnosis Reports” on page 181](#).
- Viewing the event log, which reflects the date and time that iSupport Asset agents run. See [“Viewing the Event Log” on page 182](#).
- Enabling email to be sent when errors occur for certain types of functionality. See [“Setting Up Log Entry Notifications” on page 186](#).
- Backing up the cSupport database. See [“Backing Up iSupport Asset Databases” on page 189](#).
- Changing the symbol for currency custom fields. See [“Changing the Currency Custom Field Symbol” on page 193](#).
- Integrating with Microsoft Active Directory®, LDAP, Microsoft® Business Solutions Customer Relationship Management (CRM), Domino Directory, and/or a Microsoft® SQL Server database as a source of customer information. See [“Integrating with Active Directory®” on page 193](#), [“Integrating with LDAP” on page 200](#), [“Integrating with Microsoft® CRM” on page 208](#), [“Integrating with Domino Directory” on page 206](#), and [“Integrating With Other Remote Databases” on page 210](#) for more information.
- Setting Up Microsoft® Windows-based authentication. This enables support representatives to bypass the Login prompt for the Desktop. See [“Setting Up Microsoft Windows-Based Authentication” on page 215](#).

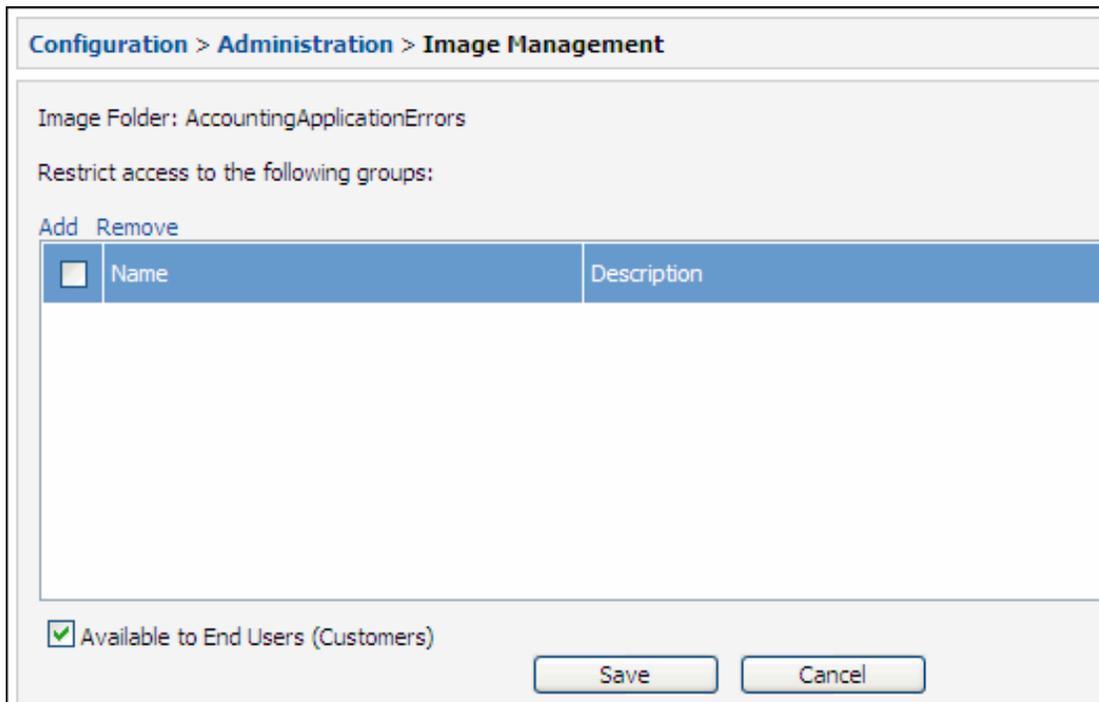
Managing Access to Images

In iSupport entry fields with a toolbar, you can use the Image Upload  icon to upload saved screenshots and other images up to 2 MB. Images are saved in the Images folder in the database and associated with folders on which group access restrictions can be enabled. Note that images in inbound email are still stored as attachments.

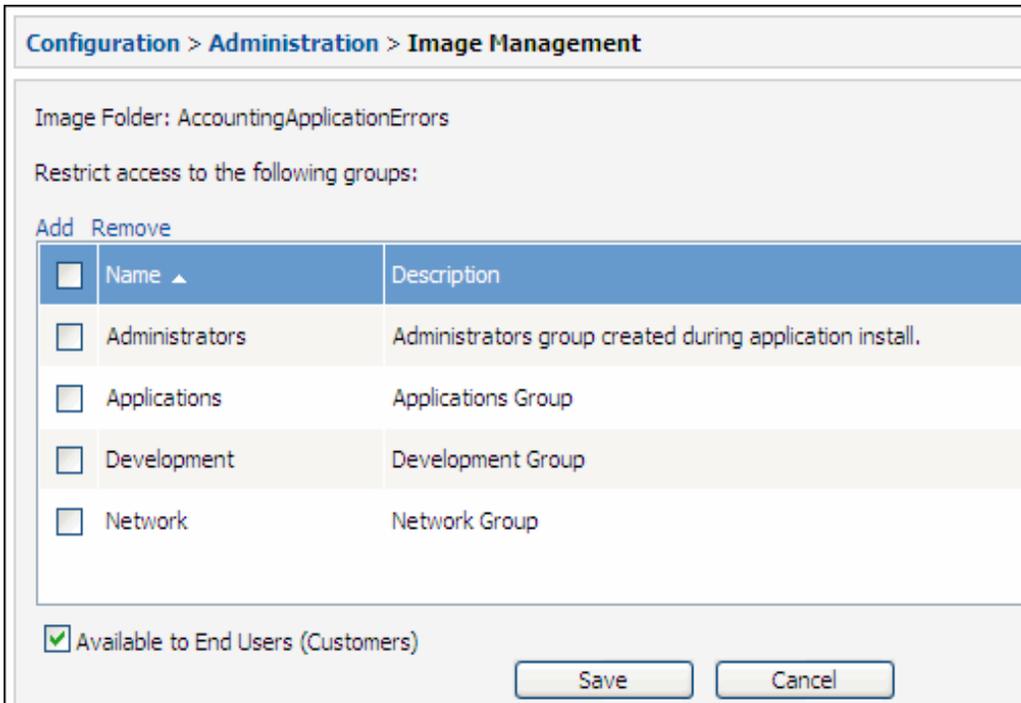
Use the Administration | Image Management option in the Configuration module to delete and restrict access to folders and images uploaded via the Image Manager.



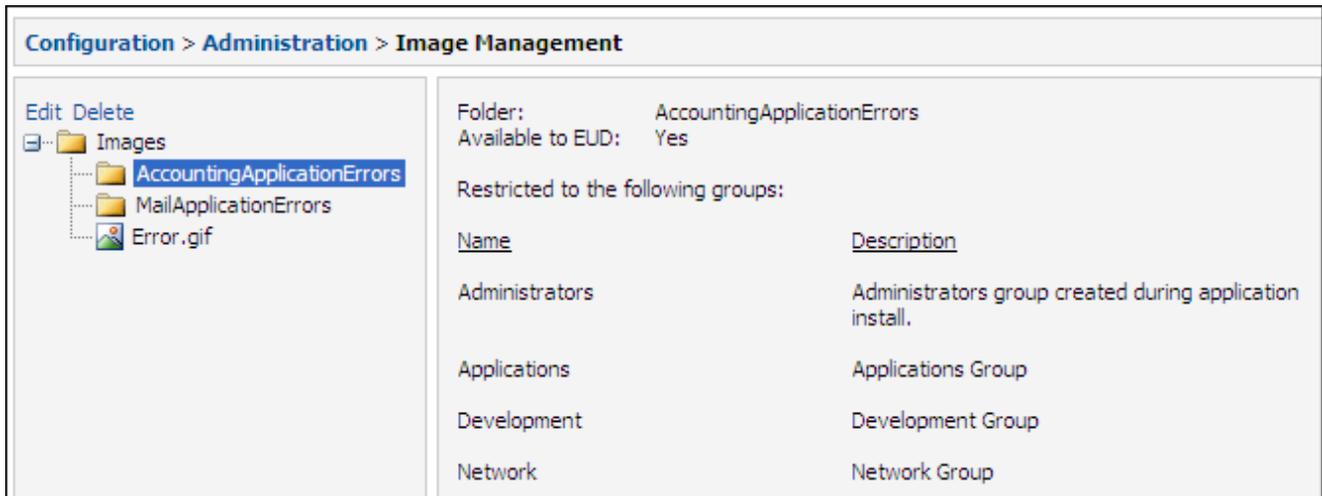
To only enable certain support representative groups to access the Images folder and/or one or more folders below it, select the folder and click the Edit link. The following appears; click the Add link to select the group(s) that can upload to or access the files in the selected folder. Use the Available to End Users (Customers) checkbox to enable customers to view the images in that folder that are included in iSupport records such as incidents, problems, changes, knowledge entries, etc.



After selecting the support representative groups that can access the images in the selected folder and clicking Add, the groups appear as shown below. Click Save.



The groups appear in the Image Management screen as shown below.



Scheduling and Running Agents

Agents perform tasks in the background that are an integral part of iSupport Asset functionality. To verify that an agent has run, select Administration | Event Log on the Configuration menu.

Agent intervals start at the time the c.Support Agent Manager service last ran; therefore, if you wish for an interval-based agent to run at a certain time, stop and start the c.Support Agent Manager service at that time. For example, if you set an interval for an agent to 24 hours and wish to have the agent run at 2 a.m., stop and start the c.Support Agent Manager service at 2 a.m.

Using Global Agents

Use the Global tab to disable or specify the interval for the Notification, Alert, and Database Maintenance agents. You can click the Run Now button to execute an agent immediately.

The screenshot shows the 'Configuration > Administration > Agents' page with the 'Global' tab selected. It displays two agent configurations:

- Alert Agent:** Description: 'This agent evaluates alerts and activates them as necessary.' Interval: '5 minutes' (dropdown menu). A green 'Run Now' button is present.
- Database Maintenance Agent:** Description: 'This agent maintains data resulting from incomplete saves, deleted records, etc.' Time Agent Should Run Each Day: '11:30 PM' (dropdown menu). A green 'Run Now' button is present.

Field	Description
Alert Agent Interval	Alerts are configured to send an email or page, and/or appear at the top of the Desktop tabs, when a view field reaches a certain threshold. Select the number of minutes or hours in the interval for the Alert agent to run and evaluate configured alerts, or select Daily to run the agent every day at a specified start time.
Time the Database Maintenance Agent Should Run Each Day	The Database Maintenance agent maintains data resulting from incomplete saves, deleted records, etc. Select the time at which the Database Maintenance agent should run each day.

Using Asset Agents

Use the following screen to enable or disable agents, or specify the interval for Asset Reminder, Inventory Scan, Auto Asset Create, Asset Import, and License Management agents. You can click the Run Now button to execute an agent immediately.

Configuration > Administration > Agents

Global **Asset** Directory Integration

Asset Reminder Agent
 This agent sends notifications to the individuals specified in the Asset Configuration screen, based on the specified number of days prior to the warranty or maintenance expiration date.
 Enable: Time Agent Should Run Each Day: 12:00 AM

Asset Inventory Scan Agent
 This agent checks inventory scan definitions and initiates scans as scheduled.
 Enable:

Auto Asset Create from Inventory Scan Agent
 This agent creates an Asset record for each inventory scan that is not associated with an asset.
 Enable:
 Populate Asset Serial Number Field with OS Serial Number:
 Default Asset Record Template for Automatic Asset Creation: Web Server 

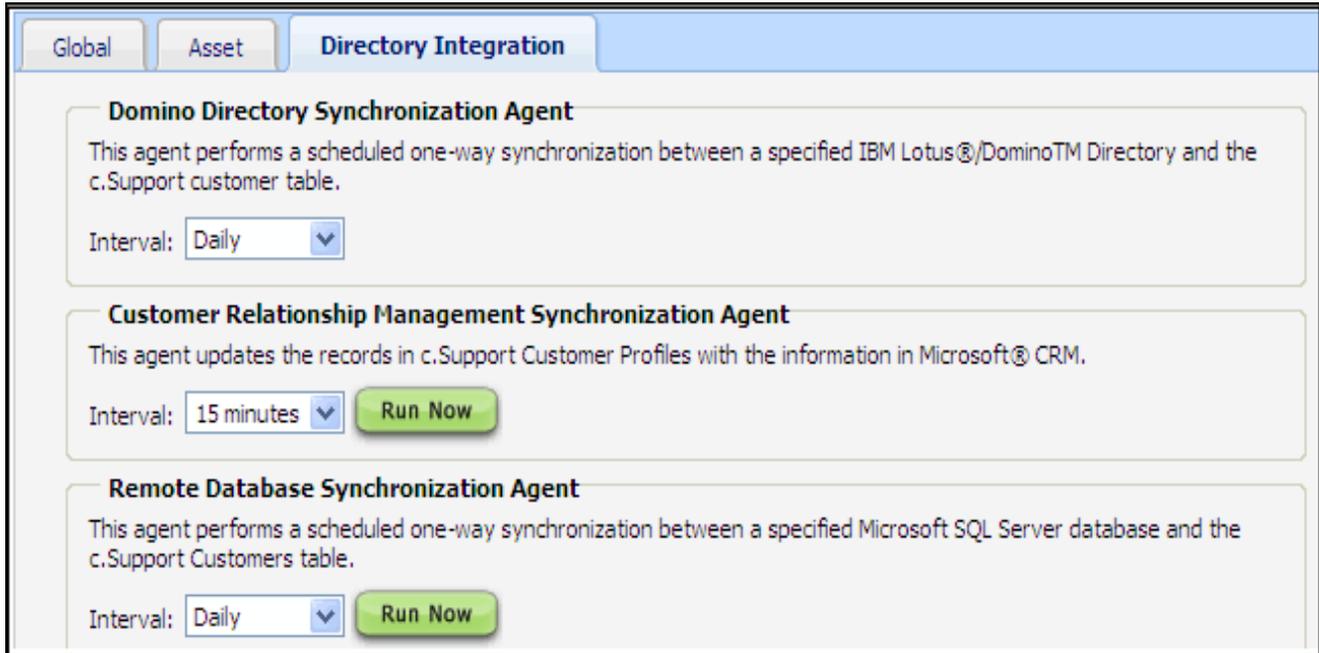
License Management Agent
 This agent scans all inventory scans and searches for the software titles specified in Software License Profile records. It compares the actual quantities found against the condition specified in the profiles, flags the profiles that meet the condition, and updates the profiles with the actual counts.
 Enable: Time Agent Should Run Each Day: 12:00 AM

Field	Description
Asset Reminder Agent	The Asset Reminder agent searches for warranty and maintenance expiration dates. If it is the specified number of days before the warranty or maintenance expiration date, it will send an email reminder to the individuals specified in the Asset record.
Time the Asset Reminder Agent Should Run Each Day	Select Yes to enable the Asset Reminder agent. After selecting Yes, select the time at which the Asset Reminder agent should run each day in the Time the Asset Reminder Agent Should Run Each Day field.
Asset Inventory Scan Agent	Select Yes to enable the Asset Inventory Scan agent that checks inventory scan definitions and initiates scans according to schedule.

Field	Description
Auto Asset Create from Inventory Scan Agent	Select Yes to enable the Auto Asset Create from Inventory Scan agent that creates asset records for each machine involved in an inventory scan that does not have an association with an asset record. The agent will run every hour based on the time at which the c.Support Agent Manager service is started. Asset records will be created using the asset selected in the Auto Asset Create Asset Record Template field as a template.
Populate Asset Serial Number Field with OS Serial Number	Select Yes to populate the Asset Serial Number field with the operating system serial number when Asset records are created automatically for machines that are involved in inventory scans but not associated with an existing record.
Asset Record Template for Automatic Asset Creation	Click this link to select the name of an existing Asset record to use as a template when the Auto Asset Create from Inventory Scan agent is run. The record's asset type will determine the fields that will appear on the automatically-created record. See "Creating Asset Records Automatically Based on Inventory Scans" on page 164 for a table listing how the fields are populated.
License Management Agent Time the License Management Agent Should Run Each Day	<p>Select Yes to enable the License Management agent that scans all existing inventory scans and searches for the software titles specified in Software License Profile records. It compares the actual quantities found against the condition specified in the profiles, flags the profiles that meet the condition, and updates the profiles with the actual counts. Notifications are sent if configured.</p> <p>After selecting Yes, select the time at which the License Management agent should run each day in the Time the License Management Agent Should Run Each Day field.</p>

Using Directory Integration Agents

Use the Directory Integration tab to enable or disable agents that trigger integration with customer data sources. You can click the Run Now button to execute an agent immediately.



Field	Description
Domino Synchronization Agent Interval	<p>The Domino Synchronization feature performs a scheduled one-way synchronization between a specified IBM Lotus®/Domino™ Directory (previously termed "NAB") and the iSupport Asset customer table. See "Integrating with Domino Directory" on page 206 for more information.</p> <p>Select the number of minutes in the interval for the synchronization to be performed, or select Daily to run the agent every day at a specified start time.</p>
CRM Synchronization Agent Interval	<p>The Microsoft® CRM Integration feature enables the CRM Synchronization agent that updates the records in iSupport Asset Customer Profiles with the information in Microsoft® CRM. See "Integrating with Microsoft® CRM" on page 208 for more information.</p> <p>Select the number of minutes in the interval for the synchronization to be performed, or select Daily to run the agent every day at a specified start time.</p>

Field	Description
RDB Synchronization Agent Interval	<p>The Remote Database Integration feature enables the agent that performs a scheduled one-way synchronization between a specified Microsoft SQL Server database and the iSupport Asset Customers table. The synchronization will be performed according to the mapping specified on the Other RDB tab in the Directory Integration screen; see “Integrating With Other Remote Databases” on page 210 for more information.</p> <p>Select the number of minutes in the interval for the synchronization to be performed, or select Daily to run the agent every day at a specified start time.</p>

Generating Diagnosis Reports

Use the Diagnosis Report feature to compile a printable summary of configuration settings and information on the server on which the diagnosis is run. The Configuration Wizard generates a diagnosis report when the Finish button is clicked.

To generate a Diagnosis Report, select Administration | Diagnostics on the Configuration menu. Then click the Create link. Complete the following fields and then click the Create button.

Field	Description
Report Title	Enter a title to be included in the Report Title field in the Report Information section at the top of the report.
Report Comments	Enter text to be included in the Comments field in the Report Information section at the top of the report.

The diagnosis report appears as shown in the partial example below:

Report Information

Report Title: Monthly Configuration Report
 Created By: Barry White
 Created: 11/24/2008 1:53:20 PM
 Comments: Documents current configuration settings for backup purposes

Server Information

Server Name: CSDOC
 Operating System: Microsoft Windows NT 5.2.3790 Service Pack 2
 Framework Version: 2.0.50727.1433
 ASPNET User Name: c.Support
 SQL Server Version: Microsoft SQL Server 2005 - 9.00.3042.00 (Intel X86) Feb 9 2007 22:47:07 Copyright on Windows NT 5.2 (Build 3790: Service Pack 2)

Viewing the Event Log

In the Configuration module, you can view Event Log entries that reflect application errors and messages and the date and time that iSupport Asset agents run. To view the Event log, select Administration | Event Log.

Configuration > Administration > Event Log

[Refresh Page](#)

Event Log Type: Database Windows Number of Days Until Auto Purge:

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 ... >|

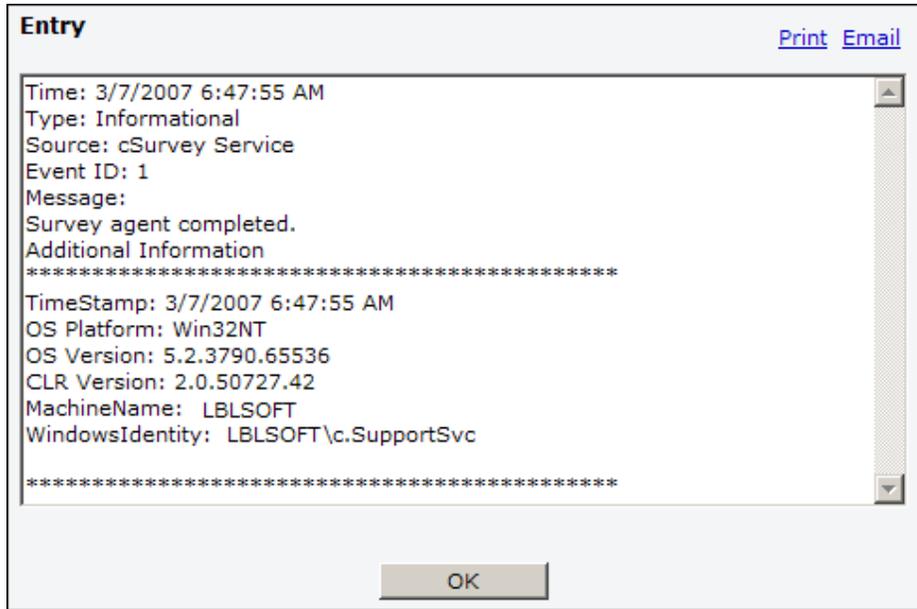
Date ▾	Type	Source	Event ID	Entry
8/20/2008 11:08:04 AM	Informational	cSupport Agent Service	16	Execution complete - SchedulingAgent. Execution time: 0.002 seconds. Additional Information ***** TimeStamp: 8/20/2008 11:08:04 AM OS Platform: Win32NT OS Version: 5.2.3790.131072 CLR Version: 2.0.50727.1433 MachineName: CSDOC WindowsIdentity: CSDOC\c.SupportSvc *****

Informational messages and warnings from the iSupport Asset services and Desktop are logged by default to a database table. You can specify logging to occur in the Windows Event Log instead by changing variables in the Logging Management section in the web.config file; see [“Specifying Logging Locations”](#) on page 185 for more information.

Use the Event Log Type field to display entries in the database table or entries in the Windows Event Log. If using database logging, you can use the Number of Days Until Auto Purge field to specify a number of days after which entries will be deleted automatically by the Database Maintenance agent.

In the event the database logging provider fails to write an event to the database, the event and an additional event for the failure will be written to the iSupport Asset Windows Event Log. If that fails, it will write to the Windows Application Log.

If you click on the date/time link of an entry, the entry will appear in a window for viewing, printing, or sending in an email.



Click the Email link to send the entry in an email. Change the To address, From address, or subject line in the Email Information dialog if applicable. Once you click OK, the email is sent.



The **Source** in the Event Log screen indicates the module in which the entry originated; entries include Desktop or cSupport Agent Service (which handles all of the iSupport Asset agents).

The **Event ID** indicates the agent causing the error or informational message. Event IDs and corresponding agents are listed below:

Event ID	Agent	Agent Description
0	Configuration Agent	Updates Configuration settings from the iSupport Asset database.
1	AD Synchronization Agent	Updates the records in iSupport Asset Customer Profiles with the information in Active Directory®.
3	Auto Asset Create from Inventory Scan Agent	Creates asset records for each machine involved in an inventory scan that does not have an association with an asset record.

Event ID	Agent	Agent Description
4	Asset Reminder Agent	Searches for warranty and maintenance expiration dates; if it is the specified number of days before the warranty or maintenance expiration date, sends an email reminder to the individuals specified in the Asset Configuration screen.
5	Asset Inventory Scan Agent	Checks inventory scan definitions and initiates scans according to schedule.
6	Domino Synchronization Agent	Performs a scheduled one-way synchronization between a specified IBM Lotus®/Domino™ Directory (previously termed "NAB") and the iSupport Asset customer table.
9	Database Maintenance Agent	Maintains data resulting from incomplete saves, deleted records, etc.
10	Memory Management Agent	Runs once every 24 hours; cleans up unused memory that is allocated but not properly reclaimed by the OS. This is/was due to a memory leak in the early 1.1x framework for service based applications.
11	Microsoft® CRM Synchronization Agent	Updates the records in iSupport Asset Customer Profiles with the information in Microsoft® CRM.
13	Remote Database Synchronization Agent	Performs a scheduled one-way synchronization between a specified Microsoft SQL Server database and the iSupport Asset Customers table.
18	Asset Import Agent	Performs a scheduled one-way synchronization between a specified Microsoft SQL Server database and the iSupport Asset Assets table.
19	License Management Agent	Checks all existing inventory scans and searches for the software titles specified in Software License Profile records. It compares the actual quantities found against the condition specified in the profiles, flags the profiles that do not meet the condition, and updates the profiles with the actual counts. Notifications are sent if configured.
20	LdapSyncAgent	Updates the records in iSupport Asset Customer Profiles with the information in an LDAP source.
21	Alert Agent	Evaluates alerts and activates them as necessary. Alerts are configured to send an email or page, and/or appear at the top of the Desktop tabs, when a view field reaches a certain threshold.
100	Service Events	Occurs when the agent manager service starts.

Specifying Logging Locations

Informational messages, errors, and warnings from the iSupport Asset services and Desktop databases are logged by default to a database table instead of the Windows Event Log. You can disable logging or specify logging to occur in the Windows Event Log by changing variables in the LoggingManagement section in the web.config file in the directories in which the Desktop functionality is installed (RepClient by default).

```
<loggingManagement>
<module name="cSupportDesktop" mode="on">
<publisher mode="on" assembly="Gwi.cSupport"
type="Gwi.LoggingManagement.DatabaseLoggingPublisher" supportedLogLevels="*"
applicationName="cSupport Desktop"/>
<publisher mode="off" assembly="Gwi.Common"
type="Gwi.LoggingManagement.WindowsEventLogPublisher" supportedLogLevels="*"
applicationName="cSupport Desktop" logName="cSupport"/>
<publisher mode="off" assembly="Gwi.cSupport"
type="Gwi.LoggingManagement.EmailPublisher" emailSubject="c.Support Desktop"
includeServerNameInSubject="true" includeFirstLineInSubject="true"
supportedLogLevels="Error" emailToAddress="example@example.com"
emailPriority="high"/>
<publisher mode="off" assembly="Gwi.Common"
type="Gwi.LoggingManagement.TwitterPublisher" supportedLogLevels="*" userName=""
password="" targetUserNames="" />
</module>
<module name="cSupportService" mode="on">
<publisher mode="on" assembly="Gwi.cSupport"
type="Gwi.LoggingManagement.DatabaseLoggingPublisher" supportedLogLevels="*"
applicationName="cSupport Agent Service"/>
<publisher mode="off" assembly="Gwi.Common"
type="Gwi.LoggingManagement.WindowsEventLogPublisher" supportedLogLevels="*"
applicationName="cSupport Agent Service" logName="cSupport"/>
<publisher mode="off" assembly="Gwi.cSupport"
type="Gwi.LoggingManagement.EmailPublisher" emailSubject="c.Support Service"
includeServerNameInSubject="true" includeFirstLineInSubject="true"
supportedLogLevels="Error" emailToAddress="example@example.com"
emailPriority="high"/>
<publisher mode="off" assembly="Gwi.Common"
type="Gwi.LoggingManagement.TwitterPublisher" supportedLogLevels="*" userName=""
password="" targetUserNames="" />
</module>
</loggingManagement>
```

The LoggingManagement section in the web.config file contains logging settings for the following:

- The cSupportDesktop module statement logs messages for functionality such as sending correspondence. The statement starts with:
<module name="cSupportDesktop" mode="on">
- The cSupportService module statement logs messages for agent-controlled functionality such as notifications, escalation, asset inventory scans, archiving, and directory integration. This statement starts with:
<module name="cSupportService" mode="on">

In each section, you can change variables to enable or disable logging to the SQL database on which iSupport Asset is installed and the Windows Event Viewer, and specify the types of messages that are logged.

The following statement controls logging to the database:

```
<publisher mode="on" assembly="Gwi.cSupport"
type="Gwi.LoggingManagement.DatabaseLoggingPublisher" supportedLogLevels="*"
applicationName="cSupport Desktop"/>
```

The following statement controls logging to the Windows Event Viewer:

```
<publisher mode="off" assembly="GWICommon"
type="Gwi.LoggingManagement.WindowsEventLogPublisher" supportedLogLevels="*"
applicationName="cSupport Desktop" logName="cSupport"/>
```

To change the settings:

- **publisher mode= "(off/on)"** disables/enables logging to the location specified in the **type=** variable
- **supportedLogLevels = "*"** logs information, error, and warning messages. You can replace the asterisk with one or more of the following:
 - **error** to log errors
 - **warning** to log warnings
 - **information** to log information messages
 - **debug** to log debug messages

See the next section for information on configuring an email to be sent when informational messages, errors, and/or warnings from the iSupport Asset services and Desktop are logged.



In the event the database logging provider fails to write an event to the database, an entry for the event and an additional entry for the failure event will be written to the iSupport Asset Windows Event Log. If that fails, it will write to the Windows Application Log.

It's important to check the size of the Microsoft Windows Event Viewer and increase it if necessary. If an error appears on the server indicating that the event log is full, go the Microsoft Windows Event Viewer, right-click on cSupport, and select Properties. In the cSupport Properties dialog, make adjustments in the fields in the Log Size section and specify the action to take when the maximum log size is reached.

Setting Up Log Entry Notifications

You can configure an email to be sent when informational messages, errors, and/or warnings from the iSupport Asset services and Desktop are logged. (For example, you could enable an email to be sent whenever an error occurs during an asset inventory scan.) The message will be included in the body of the email.

To configure the email to be sent, you'll need to change variables in the Logging Management section in the web.config file in the directory in which the Desktop functionality is installed (RepClient by default).

Make changes in the applicable module section:

- The cSupportDesktop module statement logs messages for functionality such as sending correspondence. The statement starts with:
<module name="cSupportDesktop" mode="on">
- The cSupportService module statement logs messages for agent-controlled functionality such as notifications, escalation, asset inventory scans, archiving, and directory integration. This statement starts with:
<module name="cSupportService" mode="on">

Replace the variables in bold below:

```
<publisher mode="off" assembly="GWICCommon"  
type="Gwi.LoggingManagement.EmailPublisher"  
supportedLogLevels="Error"  
emailFromAddress="example@example.com"  
emailToAddress="example@example.com"  
emailSubject="Desktop/iSupport Service/iSupport cSurvey Service"  
includeServerNameInSubject="true" includeFirstLineInSubject="true"  
emailPriority="High" smtpServer="localhost" />
```

- Change the **mode = "off"** to **mode = "on"** variable to enable log entry notifications for the applicable module.
- The emailSubject, includeServerNameInSubject, and includeFirstLineInSubject variables affect the subject line of the email. By default all are enabled, separated by colons - the server is listed first, then the emailSubject variable, and then the first line of the log entry. An example is shown below:

LBL-00: Desktop: System.Web.UI.ViewStateException Occurred

- Change the **emailSubject="Desktop/iSupport Service/iSupport cSurvey Service"** variable if you wish to enter custom text for the subject line.
- Change the **includeServerNameInSubject="true"** variable to "false" if you wish to omit the server name from the subject line of the email.
- Change the **includeFirstLineInSubject="true"** variable to "false" if you wish to omit the first line of the log entry from the subject line of the email.
- Change the **supportedLogLevels = "*" statement** to reflect whether to send an email when informational messages, errors, and/or warnings occur. You can replace the asterisk with one or more of the following; separate each with a semicolon.
 - **error** to log errors
 - **warning** to log warnings
 - **information** to log information messages

- Enter applicable email addresses for the **emailFromAddress** and **emailToAddress** variables. You can include multiple email addresses; separate each with a comma.
- Change **emailPriority="High"** to reflect the priority at which the email should be sent.
- If using a server that is different from the local server on which iSupport Asset is installed for outbound mail, change the **smtpServer** variable from **"localhost"** to the name of the server to be used for outbound mail sent by iSupport Asset.

Troubleshooting

If entries are not included in the log or email is not sent, exception messages (including the original message) are written to the Application log in the Microsoft® Windows Event Viewer. On the server, check the Microsoft Windows Event Viewer by selecting Start | Programs | Administrative Tools | Event Viewer | Application.

Sending Error Messages to a Twitter Account

You can send error messages from iSupport Asset to a Twitter account by adding statements to the web.config file. Messages will be truncated to 140 characters.

In the loggingManagement section in the web.config file for the Rep client, set the following properties in the added statements:

- supportedLogLevels: valid values are * (log all), Informational, Warning, and Error. Use a semicolon to combine two values (example: Error;Warning).
- userName: the Twitter account user name to be used for iSupport Asset login.
- password: the password for the userName account.
- targetUserName: the Twitter account user name to which messages should be sent.

Example:

```
<LoggingManagement>
<module name="cSupportDesktop" mode="on">
<publisher mode="on" assembly="Gwi.Logging.Twitter" type="Gwi.Logging.Twitter.Publisher"
supportedLogLevels="*" userName="cSupportAccount" password="cSupportAccountPassword"
targetUserName="JoeAdmin" />
</module>
</loggingManagement>
```

Setting Global Search Timeout Values

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.

If a potential search set is too large, performing a global search will result in a timeout; therefore, you can configure timeout values for each entity that is included in the global search. These values can be set through the web.config file in the RepClient folder; to increase the search timeout for individual entities in the global search specified in seconds, add the following to <sectionGroup name="applicationSettings" .../>.

Note that valid values are positive integers, default value = 30, and setting the value to 0 will cause the corresponding entity to be excluded from the search.

```
<section name="Gwi.cSupport.Properties.Settings"
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" requirePermission="false" />
```

```
<Gwi.cSupport.Properties.Settings>
  <setting name="Gwi_cSupport_GlobalSearch_CustomerTimeout" serializeAs="String">
    <value>30</value>
  </setting>
  <setting name="Gwi_cSupport_GlobalSearch_AssetTimeout" serializeAs="String">
    <value>30</value>
  </setting>
  <setting name="Gwi_cSupport_GlobalSearch_CompanyTimeout" serializeAs="String">
    <value>30</value>
  </setting>
</Gwi.cSupport.Properties.Settings>
```

Backing Up iSupport Asset Databases

In order for you to update iSupport Asset or recover data in case of loss, you'll need to back up:

- The cSupport, cAsset, and cSupportReporting databases and transaction logs in the SQL data directory (\ProgramFiles\Microsoft SQLServer\MSSQL\Data) or the same named databases via SQL or equivalent database backup utility
- The Web.config file in the directories in which the Desktop functionality is installed (RepClient by default)
- File of words to be ignored during spell-check in <Desktop install directory>\Configuration\data\en-US-CustomDictionary.txt

These steps cover the cSupport database backup; to back up the other databases, substitute the other database names in the commands.

To perform the backup operation:

- If you have Microsoft® SQL Server 2005, (not shipped with iSupport Asset), you can use Microsoft® SQL Server Management Studio.
- If you have SQL Server 2005 Express Edition (shipped with iSupport Asset), you'll need to use OSQL, a Microsoft Win32® command prompt utility. **This section contains commands for using OSQL.**



For additional parameters and more information on backing up and restoring SQL Server databases, go to www.microsoft.com.

There are two methods for backing up the cSupport database. Method A is simpler, but you have to stop the SQL Server application; Method B contains more steps but does not require you to stop and start the SQL Server application.

Method A - Backing Up Including Stopping/Starting MSSQL

- 1 Create a folder for the backup file; for example, c:\Program Files\Microsoft SQL Server\MSSQL\data\cSupportBackup.
- 2 Right-click on the SQL Server  icon in the lower right corner of the desktop. Select MSSQLSERVER - Stop. Wait a few moments for the server to complete this function.
- 3 Using Windows Explorer, copy the cSupport.mdf, cSupport_log.ldf, and the rest of the iSupport Asset databases and log files in the \Program Files\Microsoft SQL Server\MSSQL\data\ directory to the backup directory you created in step 1. The date and timestamp should be the same on both the current and backup copies.
- 4 Right-click on the SQL Server  icon in the lower right corner of the desktop. Select MSSQLSERVER - Start.

Method B - Backing Up Without Stopping/Starting MSSQL



You cannot overwrite a file using this method; if a backup file already exists in the backup directory, you must either rename or delete it.

- 1 Create a folder for the backup file; for example, c:\Program Files\Microsoft SQL Server\MSSQL\data\cSupportBackup.
- 2 On the server on which iSupport Asset is installed, select Start | Run. In the Run dialog, enter **cmd** and click OK.
- 3 At the :> prompt, enter the following:
OSQL -U username -P password
where *username* and *password* is the login for accessing your SQL Server application.
- 4 At the 1> prompt, enter the following.
BACKUP DATABASE cSupport TO DISK = 'backup folder server and location\backup file name'
Example: **BACKUP DATABASE cSupport TO DISK = 'c:\Program Files\Microsoft SQL Server\MSSQL\data\cSupportBackup\cSupport.bak'**
(Backup file names typically include a .bak extension; for example, cSupport.bak.)

Repeat this command for the cAsset and cSupportReporting databases.

5 At the 2> prompt, enter the following:

BACKUP LOG cSupport TO DISK = 'backup folder server and location\backup log file name'

Example: BACKUP LOG cSupport TO DISK = 'c:\Program Files\Microsoft SQL Server\MSSQL\data\cSupportBackup\cSupport_Log.bak'

Repeat this command for the cAsset and cSupportReporting database log files.

6 At the 3> prompt, enter the following:

GO

7 "BACKUP successfully processed" messages display. At the >1 prompt, enter **EXIT**.

8 Using Explorer, verify that the backup files exist.



The database backup file size may be smaller than the current database file because the backup contains only the actual data in the database and not empty space.

Restoring iSupport Asset Databases

Restoring a database enables you to utilize a full backup file to recreate an iSupport database. The restored database will be a copy as it existed when the backup operation completed. There are two methods for restoring an iSupport database; the appropriate method depends on the method you chose to back up.

These steps cover the cSupport database restore; to restore the other databases, substitute the other database names in the commands.

Method A - Restoring Including Stopping/Starting MSSQL

- 1 Right-click on the SQL Server  icon in the lower right corner of the desktop. Select MSSQLSERVER - Stop. Wait a few moments for the server to complete this function.
- 2 Using Windows Explorer, copy the cSupport.mdf and iSupport Asset.log files from the backup directory to the \Program Files\Microsoft SQL Server\MSSQL\data\ directory. The date and timestamp should be the same on both the current and backup copies.
- 3 Right-click on the SQL Server  icon in the lower right corner of the desktop. Select MSSQLSERVER - Start.

Method B - Restoring Without Stopping/Starting MSSQL

Removing the Failed cSupport Database and Log File

- 1 On the server on which iSupport is installed, select Start | Run. In the Run dialog, enter **cmd** and click OK.

2 At the :> prompt, enter the following:

```
OSQL -U username -P password
```

where *username* and *password* is the login for accessing your SQL Server application.

3 At the 1> prompt, enter the following:

```
SP_LOCK
```

4 At the 2> prompt, enter the following:

```
GO
```

5 A list of server connections appears as shown below:

```
1> sp_lock
2> go
```

spid	dbid	ObjId	IndId	Type	Resource	Mode
68	5		0	0	DB	S
69	5		0	0	DB	S
70	5		0	0	DB	S
71	5		0	0	DB	S
72	5		0	0	DB	S
73	5		0	0	DB	S
74	5		0	0	DB	S
75	5		0	0	DB	S
85	5		0	0	DB	S
86	1	85575343	0	0	TAB	IS
87	5		0	0	DB	S

For each connection with a type of DB:

a Enter the following at the 1> prompt:

```
KILL spid
```

where *spid* is the number in the spid column.

b When finished entering the KILL *spid* command for each connection with a type of DB, enter the following:

```
GO
```

6 At the 1> prompt, enter the following to delete the corrupted database:

```
DROP DATABASE cSupport
```

7 At the 2> prompt, enter the following:

```
GO
```

"Deleting database file" messages display.

Restoring the cSupport Database from a Full Backup

1 At the 1> prompt, enter the following:

```
RESTORE DATABASE cSupport FROM DISK = 'backup folder server and location\backup file name' WITH NORECOVERY
```

Example: RESTORE DATABASE cSupport FROM DISK = 'c:\Program Files\Microsoft SQL Server\MSSQL\data\cSupportBackup\cSupport.bak' WITH NORECOVERY

- At the 2> prompt, enter the following:
**RESTORE LOG cSupport FROM DISK = 'backup folder server and location\backup log file name'
WITH RECOVERY**

Example: RESTORE LOG cSupport FROM DISK = 'c:\Program Files\Microsoft SQL Server\MSSQL\data\cSupportBackup\cSupport_Log.bak' WITH RECOVERY

- At the 3> prompt, enter the following:
GO

- At the 1> prompt, enter the following:
EXIT

- Open the Desktop. The server may need a few minutes to re-establish connections to the restored database. If you receive an error after signing in, restart the browser and try again.

Changing the Currency Custom Field Symbol

The dollar sign symbol that precedes currency custom fields is controlled by the server's default language, but you can override it via a setting in the web.config file (located in the directories in which the Desktop functionality are installed). The following tag in the web.config file defines globalization settings:

```
<globalization requestEncoding="utf-8" responseEncoding="utf-8"/>
```

You can add a culture/language name setting to this tag to override the currency symbol; in the example below, *culture="en-GB"* was added to change the dollar sign symbol to the English (United Kingdom) pound symbol.

```
<globalization requestEncoding="utf-8" responseEncoding="utf-8" culture="en-GB"/>
```

See <http://msdn2.microsoft.com/en-us/library/system.globalization.cultureinfo.aspx> for more information on defined culture settings.



The settings in the web.config file should be updated only as directed (via this guide or GWI Technical Support); failure to do so may result in data loss or corruption.

Integrating with Active Directory®

The Active Directory® Integration feature enables an agent that, based on the email address, 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.

- 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.

When the feature is enabled, the agent runs immediately and then on an interval basis according to the schedule set up in the Active Directory screen. The Active Directory® Integration feature does not modify the contents in Active Directory® in any way.

To access the Active Directory tab, select Customer Management | Directory Integration on the Configuration menu. Use the Create link on the Active Directory tab to create an Active Directory source definition.

Configuration > Customer Management > Directory Integration

Active Directory | LDAP | Domino Directory | Microsoft CRM | Other RDB | Advanced

The Active Directory Integration feature allows you to utilize Active Directory as a source for c.Support's customer information. See [help](#) for configuration information.

[Create](#) [Delete](#)

<input type="checkbox"/>	Name ▲	Search Root	EUD Access Enabled	Active
<input type="checkbox"/>	LBLSoft	LDAP://LBL-AD/dc=lbl,dc=com	Yes	Yes

The source definition will enable you to configure a query search root and filter, and the interval at which the AD Synchronization should run. If utilizing multiple customer data sources, use the Advanced tab in the Directory Integration screen to select the order of precedence if there are matching records in different sources.

Use the following screen to enter a source definition.

Configuration > Customer Management > Directory Integration

Active Directory | LDAP | Domino Directory | Microsoft CRM | Other RDB | Advanced

The Active Directory Integration feature allows you to utilize Active Directory as a source for c.Support's customer information. See [help](#) for configuration information.

Synchronize Groups: Yes No

AD Source Name:

Search Root:

Search Filter:

Active: Yes No AD Synchronization Interval: ▾

If anonymous Active Directory connections are not allowed in your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave these fields blank.

Username:

Password: [Reset](#)

Field	Description
Synchronize Groups	Select Yes to pull groups in Active Directory Customer records into the Secondary Group field in the associated iSupport Asset Customer Profile records. To assign a primary group to multiple iSupport Asset Customer Profile records, select a customer view on the Desktop and then click the Add to Group icon.
AD Source Name	Enter a name for the AD source definition. This name will appear in the Source field in the associated Customer Profile record.

Field	Description
Search Root	<p>Use this field to specify the complete search root URL for querying user information in Active Directory® entries. The search root can point to anywhere in the Active Directory® hierarchy.</p> <p>Syntax Examples:</p> <ul style="list-style-type: none"> ■ Searching the first responding global catalog in a domain: <i>GC://dc=domain,dc=tld</i> Example: <i>GC://dc=gwi,dc=com</i> ■ Searching the root of a specific global catalog in a domain: <i>GC://hostORdomainname:port/dc=domain,dc=tld</i> Example: <i>GC://Server1:8989/dc=gwi,dc=com</i> ■ Searching an organizational unit of a domain controller in a domain: <i>LDAP://hostORdomainname/ou=org unit,dc=domain,dc=tld</i> Example: <i>LDAP://Server1/ou=dev,dc=gwi,dc=com</i> ■ Searching the root of a specific domain controller in a domain: <i>LDAP://hostORdomainname/dc=domain,dc=tld</i> Example: <i>LDAP://Server1/dc=gwi,dc=com</i> ■ Searching the root of a domain controller using a specific port in a domain: <i>LDAP://hostORdomainname:port/dc=domain,dc=tld</i> Example: <i>LDAP://Server1:8989/dc=gwi,dc=com</i>

Field	Description
Search Filter	<p>Use this field to enter a search filter for returning a specific set of information to iSupport Asset Customer Profiles. For example, you can set up a filter to exclude certain users or account names.</p> <p>This feature utilizes LDAP (Light Weight Directory Access Protocol), which defines how information can be accessed in directories. Active Directory® supports the LDAP search filter syntax as specified in RFC 1960. For information on LDAP and search filters, see http://www.microsoft.com/windows2000/docs/uldap.doc. <u>Examples</u></p> <ul style="list-style-type: none"> ■ All users that contain a first and last name: <pre>((objectCategory=Person) (objectClass=user) (givenName=*) (sn=*))</pre> ■ All users that contain a first and last name excluding Tom Jones and SQL Account: <pre>((objectCategory=Person) (objectClass=user) (givenName=*) (sn=*) (!name =Tom Jones) (!name=SQL Account))</pre> ■ All users and contacts that contain a first and last name: <pre>((objectCategory=Person) (givenName=*) (sn=*) ((objectClass=user) (objectClass=contact)))</pre>

Field	Description
	<ul style="list-style-type: none"> <li data-bbox="488 201 1443 726"> ■ All users and contacts that contain a first and last name, excluding Tom Jones, Barry White, and SQL Account: (& (objectCategory=Person) ((objectClass=user) (objectClass=contact)) (givenName=*) (sn=*) (!name =Tom Jones) (!name=SQL Account) (!name =Barry White)) <li data-bbox="488 747 1243 1119"> ■ All users with a valid Microsoft Windows user name (<i>domainname\username</i>): (& (objectCategory=Person) (objectClass=user) (givenName=*) (sn=*) (userPrincipalName=*@*) (samAccountName=*))
Active	Select Yes to enable the Active Directory® Integration agent that updates the records in iSupport Asset Customer Profiles with the information in Active Directory®. The agent runs immediately and then continues to run as scheduled in the AD Synchronization Interval field.
AD Synchronization Interval	Select the number of minutes in the interval for the synchronization to be performed.
Username Password	If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave these fields blank.

Data Map

The Active Directory® Integration feature maps according to the following schema:

iSupport Asset Customer Field	AD Schema Property	MMC AD Users & Computers
First Name	givenName	General:First name
Last Name	sn	General>Last name
Phone	telephoneNumber	General:Telephone number[0]
Fax	facsimileTelephoneNumber	Telephones:Fax[0]
Cellular	mobile	Telephones:Mobile[0]
Email	mail	General:Email
Company	company	Organization:Company
Location	physicalDeliveryOfficeName	General:Office
Department	department	Organization:Department
Group	MemberOf	Member Of:Member of
Title	title	Organization:Title
Manager	manager	Organization:Manager name
Address1	streetAddress[0]	Address:Street[0]
Address2	streetAddress[1]	Address:Street[1]
Address3	streetAddress[2]	Address:Street[2]
City	l	Address:City
State	st	Address:State/province
ZIP	postalCode	Address:Zip/Postal Code
Country	co	Address:Country/region
Source	n/a	n/a
SyncKey	objectGUID	n/a
Created	whenCreated	Object:Created
Modified	whenChanged	Object:Modified

Integrating with LDAP

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. If enabled, 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 the LDAP Integration feature does not modify the contents in the LDAP source in any way.

Go to the following links for more information:

- <http://www.rfc-archive.org/getrfc.php?rfc=3377> - Top level LDAPv3 Technical specs
- <http://www.rfc-archive.org/getrfc.php?rfc=2254> - Search Filters (with examples)
- <http://www.rfc-archive.org/getrfc.php?rfc=2255> - URL formats (examples for Search Root field)
- <http://www.rfc-archive.org/getrfc.php?rfc=2256> - User Schema (standard available attributes, useful for mapping)

To access the LDAP tab, select Customer Management | Directory Integration on the Configuration menu. Use the Create link on the LDAP tab to create an LDAP source definition.

Configuration > Customer Management > Directory Integration

Active Directory | **LDAP** | Domino Directory | Microsoft CRM | Other RDB | Advanced

The LDAP Integration feature allows you to utilize LDAP as a source for iSupport's customer information.

LDAP Source Name:

Server:

Search Root:

Search Filter:

Use SSL: Yes No

[Refresh Attributes](#)

Field Mappings:

Standard Fields | Custom Fields

LDAP Attributes	iSupport Columns	Mapping
objectcategory	LNAME	name-> LNAME
objectclass	FNAME	
objectguid	PHONE	
objectsid	FAX	
operatingsystem	CELLULAR	
operatingsystemserv	LOCATION	
operatingsystemversion	EMAIL	
pager	DEPT	
...	LOGIN	

Active: Yes No

LDAP Synchronization Interval:

If anonymous LDAP connections are not allowed in your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave these fields blank.

Username:

Password:

Field	Description
LDAP Source Name	Enter a name for the LDAP source definition. This name will appear in the Source field in the associated Customer Profile record.
Server	Enter the server on which the source entries are located. Do not include "LDAP://" before your entry.

Field	Description
Search Root	<p>Use this field to enter the distinguished name of the location within the domain controller for querying user information in LDAP source entries. The search root can point to anywhere in the LDAP source hierarchy.</p> <p>Syntax Examples:</p> <ul style="list-style-type: none"> ■ Searching the first responding global catalog in a domain: <i>GC://dc=domain,dc=tld</i> Example: <i>GC://dc=gwi,dc=com</i> ■ Searching the root of a specific global catalog in a domain: <i>GC://hostORdomainname:port/dc=domain,dc=tld</i> Example: <i>GC://Server1:8989/dc=gwi,dc=com</i> ■ Searching an organizational unit of a domain controller in a domain: <i>LDAP://hostORdomainname/ou=org unit,dc=domain,dc=tld</i> Example: <i>LDAP://Server1/ou=dev,dc=gwi,dc=com</i> ■ Searching the root of a specific domain controller in a domain: <i>LDAP://hostORdomainname/dc=domain,dc=tld</i> Example: <i>LDAP://Server1/dc=gwi,dc=com</i> ■ Searching the root of a domain controller using a specific port in a domain: <i>LDAP://hostORdomainname:port/dc=domain,dc=tld</i> Example: <i>LDAP://Server1:8989/dc=gwi,dc=com</i>

Field	Description
Search Filter	<p>Use this field to enter a search filter for returning a specific set of information to iSupport Asset Customer Profiles. For example, you can set up a filter to exclude certain users or account names.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> ■ All users that contain a first and last name: <pre>(& (objectCategory=Person) (objectClass=user) (givenName=*) (sn=*))</pre> ■ All users that contain a first and last name excluding Tom Jones and SQL Account: <pre>(& (objectCategory=Person) (objectClass=user) (givenName=*) (sn=*) (!name =Tom Jones) (!name=SQL Account))</pre> ■ All users and contacts that contain a first and last name: <pre>(& (objectCategory=Person) (givenName=*) (sn=*) ((objectClass=user) (objectClass=contact)))</pre>

Field	Description
	<ul style="list-style-type: none"> ■ All users and contacts that contain a first and last name, excluding Tom Jones, Barry White, and SQL Account: (& (objectCategory=Person) ((objectClass=user) (objectClass=contact)) (givenName=*) (sn=*) (!name =Tom Jones) (!name=SQL Account) (!name =Barry White))
Use SSL	SSL is an encryption method that overlays the connection between the cSupport server and the LDAP source server. Select Yes if SSL encryption is enabled on the LDAP source server.
Field Mappings	<p>When you make an entry in the LDAP Attributes field and click the Refresh Attributes link, the iSupport Asset Columns field will be populated with the corresponding columns in the LDAP source. The iSupport Asset Columns field contains the columns in the iSupport Asset Customers table. Use the Custom Fields tab to map LDAP attributes to fields set up on the Customer tab in the Custom Fields Configuration screen.</p> <ul style="list-style-type: none"> ■ To map a field, select a field in the LDAP Attributes field and the corresponding field in the iSupport Asset Columns field. Then click the  button. The associated fields display in the Mapping field. In order to save the record, you must create a map for the first name, last name, email address, and SYNC_KEY. ■ To remove an entry from the Mapping field, select the entry and click the  button. <p>Use the SYNC_KEY field under iSupport Asset Columns to map to a value that is an unchanging unique identifier field in the source database.</p>
Active	Select Yes to enable the agent that updates the records in iSupport Asset Customer Profiles with the information in the LDAP source. The agent runs immediately and then continues to run as scheduled in the LDAP Synchronization Interval field.
LDAP Synchronization Interval	Select the amount of time in the interval for the synchronization to be performed.

Field	Description
Username Password	<p>If anonymous connections are not allowed in your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave these fields blank.</p> <p>Use the fully qualified Distinguished Name for best results. If accessing a server hosting an Active Directory installation, it will work with several formats. For example, if the user name is lbladmin and it is in the lbl domain, you could enter lbladmin, lb\lbladmin, lbladmin@lbl.soft.com. All of these entries would work, but you could also enter the full Distinguished Name for the lbladmin user account (cn=lbladmin,cn=users,dc=lbl,dc=soft,dc=com). Note that if you are connecting to a non-AD server like E-directory, the Username field must contain the fully qualified Distinguished Name.</p>

Integrating with Domino Directory

The Domino Directory Integration feature enables you to perform a scheduled one-way synchronization between a specified IBM Lotus®/Domino™ Directory (previously termed “NAB”) and the iSupport Asset customer table. (Note: The customer’s login information cannot be populated.) You’ll specify the server on which the Directory is located and Notes ID and password for accessing the server. The synchronization will occur according to the schedule defined for the Domino Synchronization agent in the Agents Configuration screen.

To configure this feature, complete the fields on the Domino Directory tab in the Directory Integration screen and click the Save button. Then schedule the Domino Synchronization agent in the Agents Configuration screen. If utilizing multiple customer data sources, use the Advanced tab in the Directory Integration screen to select the order of precedence if there are matching records.

Field	Description
Enable Domino Directory Integration	Select Yes to enable the Domino Directory Integration feature for updating the iSupport Asset Customers table with the information in a Domino Directory. Note: the synchronization will not occur until you schedule the Domino Synchronization Agent in the Agents configuration screen.
Search Root	Enter the search root URL for accessing the server on which the Domino Directory is located. This field is used for connection purposes only; the Domino LDAP task returns values for all Domino Directories identified on the server through Directory Assistance.
Username Password	Enter the username and password for authentication when queries are performed.



The Domino Directory Integration feature requires that the LDAP task is running on the Domino Directory server.

Data Map

The Domino Directory Integration feature maps according to the following schema:

iSupport Asset Customer Field	LDAP Name	Notes Name
First Name	givenName	FirstName
Last Name	sn	LastName
Phone	telephoneNumber	OfficePhoneNumber
Fax	facsimileTelephoneNumber	OfficeFAXPhoneNumber
Cellular	mobile	CellPhoneNumber
Email	mail	InternetAddress
Company	CompanyName	CompanyName
Location	Location	Location
Department	Department	Department
Title	title	JobTitle
Manager	manager	manager
Address1	OfficeStreetAddress	OfficeStreetAddress
City	l	OfficeCity
State	st	OfficeState
ZIP	postalCode	OfficeZip
Country	c	OfficeCountry

Integrating with Microsoft® CRM

The 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.

Configuration > Customer Management > Directory Integration

Active Directory | LDAP | Domino Directory | **Microsoft CRM** | Other RDB | Advanced

The Microsoft® Customer Relationship Management (CRM) Integration feature allows you to utilize Microsoft CRM contacts as a source for c.Support's customer information.

Enable Microsoft CRM Integration: Yes No

Microsoft CRM SQL Server:

Microsoft CRM SQL Database:

Microsoft CRM SQL User Name:

Microsoft CRM SQL Password: [Reset](#)

- 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 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, 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.

When the feature is enabled, the agent runs immediately and then on an interval basis according to the schedule set up in the Agents screen. For information on the Agents screen, see [“Scheduling and Running Agents” on page 176](#). The Microsoft® CRM Integration feature does not modify the contents in Microsoft® CRM in any way.

Field	Description
Enable Microsoft CRM Integration	Select Yes to enable the Microsoft® CRM Integration agent that updates the records in iSupport Asset Customer Profiles with the information in Microsoft® CRM. The agent runs immediately and then continues to run as scheduled in the Agents screen.

Field	Description
Microsoft CRM SQL Server	Enter the location of the Microsoft® SQL server that contains the Microsoft® CRM application.
Microsoft CRM SQL Database	Enter the name of the database containing the Microsoft® CRM contacts.
Microsoft CRM SQL Username	Enter the username and password for logging into the Microsoft CRM SQL database. This login must have Read permission for performing queries.
Microsoft CRM SQL Password	

If utilizing multiple customer data sources, use the Advanced tab in the Directory Integration screen to select the order of precedence if there are matching records.

Data Map

The Microsoft® Business Solutions Customer Relationship Management (CRM) Integration feature maps according to the following schema:

iSupport Asset Customer Field	CRM Database Table	Field Value
Cellular	Contact Base	MobilePhone
Company	Contact Base	AccountId
Dept	Contact Base	Department
Email	Contact Base	EmailAddress1
Fax	Contact Base	Fax
FName	Contact Base	FirstName
LName	Contact Base	LastName
Manager	Contact Base	ManagerName
Phone	Contact Base	Telephone1
Sync_Key	Contact Base	ContactId
Title	Contact Base	JobTitle
Address1	CustomerAddressBase	Line1
Address2	CustomerAddressBase	Line2
Address3	CustomerAddressBase	Line3
City	CustomerAddressBase	City
Country	CustomerAddressBase	Country
Location	CustomerAddressBase	Name
State	CustomerAddressBase	StateOrProvince
ZIP	CustomerAddressBase	PostalCode

Integrating With Other Remote Databases

The Remote Database Integration feature enables you to perform a scheduled one-way synchronization between a specified Microsoft SQL Server database and the iSupport Asset Customers table. You'll specify the data source connection string, SQL (Structured Query Language) query, and column mapping. The synchronization will occur according to the RDB Synchronization Agent schedule defined in the Agents configuration screen.

This feature can be used with any Microsoft SQL Server database that contains customer data.

Configuration > Customer Management > Directory Integration

Active Directory | LDAP | Domino Directory | Microsoft CRM | **Other RDB** | Advanced

The Remote Database (RDB) Integration feature allows you to utilize a Microsoft SQL Server as a source for iSupport's customer information.

Enable RDB Directory Integration: Yes No

Connection String: Server=10.16.100; Database=Cust; user id=sa; password=password

SQL Query: Select * from Customers

Field Mappings:

Refresh Columns

Standard Fields | Custom Fields

SQL Columns	iSupport Columns	Mapping
ID	FAX	LNAME -> LNAME
GUID	CELLULAR	FNAME -> FNAME
FAX	LOCATION	PHONE -> PHONE
CELLULAR	DEPT	EMAIL -> EMAIL
LOCATION	ADDRESS1	
ID_SLA	ADDRESS2	
DEPT	ADDRESS3	
ADDRESS1	CITY	
ADDRESS2	STATE	

Complete the fields and click the Save button. Then schedule the RDB Synchronization agent in the Agents Configuration screen. If utilizing multiple customer data sources, use the Advanced tab in the Directory Integration screen to select the order of precedence if there are matching records.

Field	Description
Enable RDB Directory Integration	Select Yes to enable the RDB Integration feature for updating the iSupport Asset Customers table with the information in a Microsoft SQL Server database. Note: the synchronization will not occur until you schedule the RDB Synchronization Agent in the Agents configuration screen.
Connection String	Enter the connection string for accessing the Microsoft SQL Server database.

Field	Description
SQL Query	Enter the SQL query string for accessing the customer-specific SQL columns in the Microsoft SQL Server database. This field is limited to 255 characters (including white space). Click the Refresh Columns button to populate the SQL Columns field.



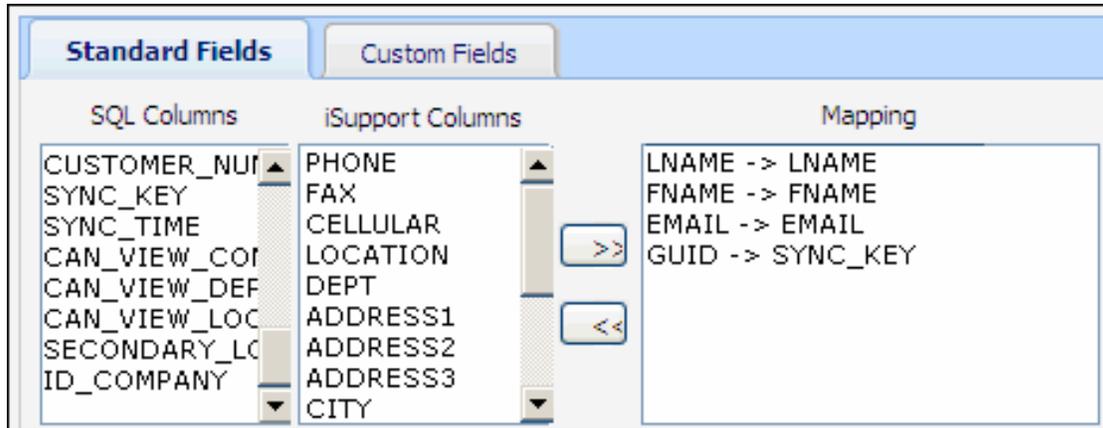
For security purposes, it is recommended that you create a read-only user account for accessing the Microsoft SQL Server database with permission to access only the customer data information. For added security, you can push the customer data into a second database created specifically for access by iSupport Asset.

When you make an entry in the SQL Query field and click the Refresh Columns button, the SQL Columns field will be populated with the corresponding columns in the Microsoft SQL Server database. The iSupport Columns field contains the columns in the iSupport Customers table.

Do the following:

- To map a field, select a field in the SQL Columns field and the corresponding field in the iSupport Columns field. Then click the button. The associated fields display in the Mapping field. In order to save the record, you must create a map for the first name, last name, and email address. Use the Custom Fields to map LDAP attributes to fields set up on the Customer tab in the Custom Fields Configuration screen.
- To remove an entry from the Mapping field, select the entry and click the button.

You can use the SYNC_KEY field under iSupport Columns to map to a value that is an unchanging unique identifier field in the source database.



Data Map

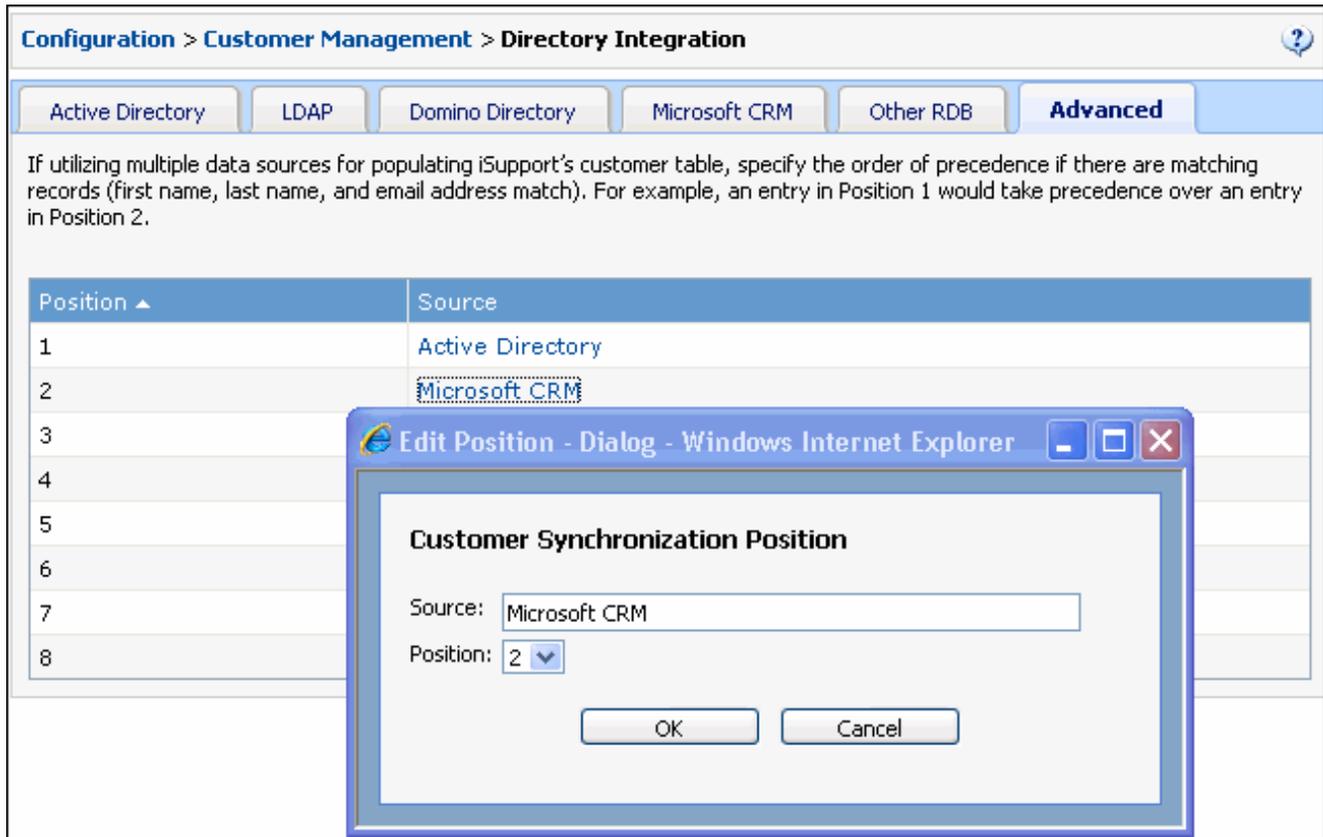
The Remote Database Integration feature maps according to the following schema:

iSupport Asset Customer Field	Supported Remote Database Fields
First Name	FName
Last Name	LName
Phone	Phone
Fax	FAX
Cellular	Cellular
Email	Email
Login	Login
Password	Password (Note: this password must be cleartext, and it will be encrypted when stored by iSupport Asset.)
Company	Company
Location	Location
Department	Dept
Title	Title
Manager	Manager
Address1	Address1
Address2	Address2
Address3	Address3
City	City
State	State
ZIP	Zip

iSupport Asset Customer Field	Supported Remote Database Fields
Country	Country
Customer ID	Customer_Number

Using the Advanced Tab to Specify the Precedence for Multiple Data Sources

If you are using multiple sources for customer data, use the Advanced tab for specifying the order of precedence if there are matching records (first name, last name, and email address match). All of the possible data sources are listed; if you are not using one of these data sources, move it down in the list.



The first position has the highest precedence. To assign a different position for a data source, click the name of the data source. In the Edit Position dialog, select the position to assign to the data source and click OK. If you move a data source down from its previous position, the rest of the data sources will move up; if you move a data source up from its previous position, the rest of the data sources will move down.

Setting Up Microsoft Windows-Based Authentication

You can set up Microsoft® Windows-based authentication with iSupport Asset. This enables support representatives to bypass the Login prompt for accessing the Desktop. If you enable Microsoft® Windows-based authentication for the Desktop, it will apply to all support representatives.

Setting Up Windows-Based Authentication for the Desktop

Use the following steps to enable Microsoft® Windows-based authentication for the Desktop. Because this procedure affects support representative logins, it's a good idea to do it after work hours.

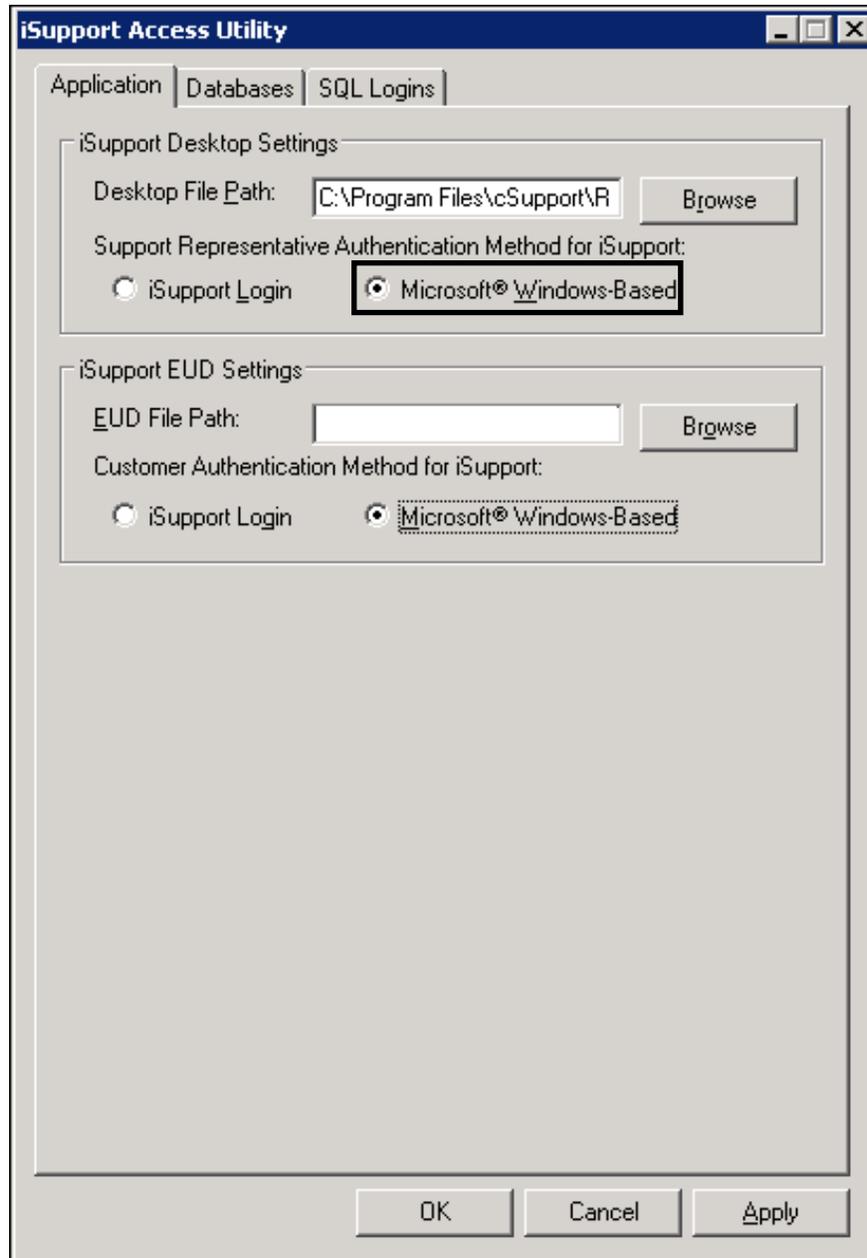
- 1 For each support representative, enter the complete Microsoft Windows user name (*domainname\username*) in the Login field on the Details tab in the Support Representative screen.

The screenshot shows the 'Configuration > Support Representatives > Profiles' screen. The 'Details' tab is selected. The form contains the following fields and values:

First Name:	Barry	Phone:	360-397-1000
Last Name:	White	Fax:	360-397-1007
Email Address:	bw@lblsoft.com	Cellular:	360-397-1008
Pager Email Address:		Location:	Headquarters
Support Center:	Default		
Display Time Zone:	(GMT-08:00) Pacific Time (US & Canada)		
Available for Routing:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Login:	LBLSOFT\Barry White
Knowledge Approver:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Password:	Reset

- 2 Open the iSupport Access Utility in the *<directory in which iSupport is installed>*Utilities folder. In the iSupport Access Utility screen, verify that the Desktop File Path field contains the correct path to the RepClient folder, or change it if necessary. (If the Desktop File Path field does not contain an entry, use the Browse button to select the location of the RepClient folder.)

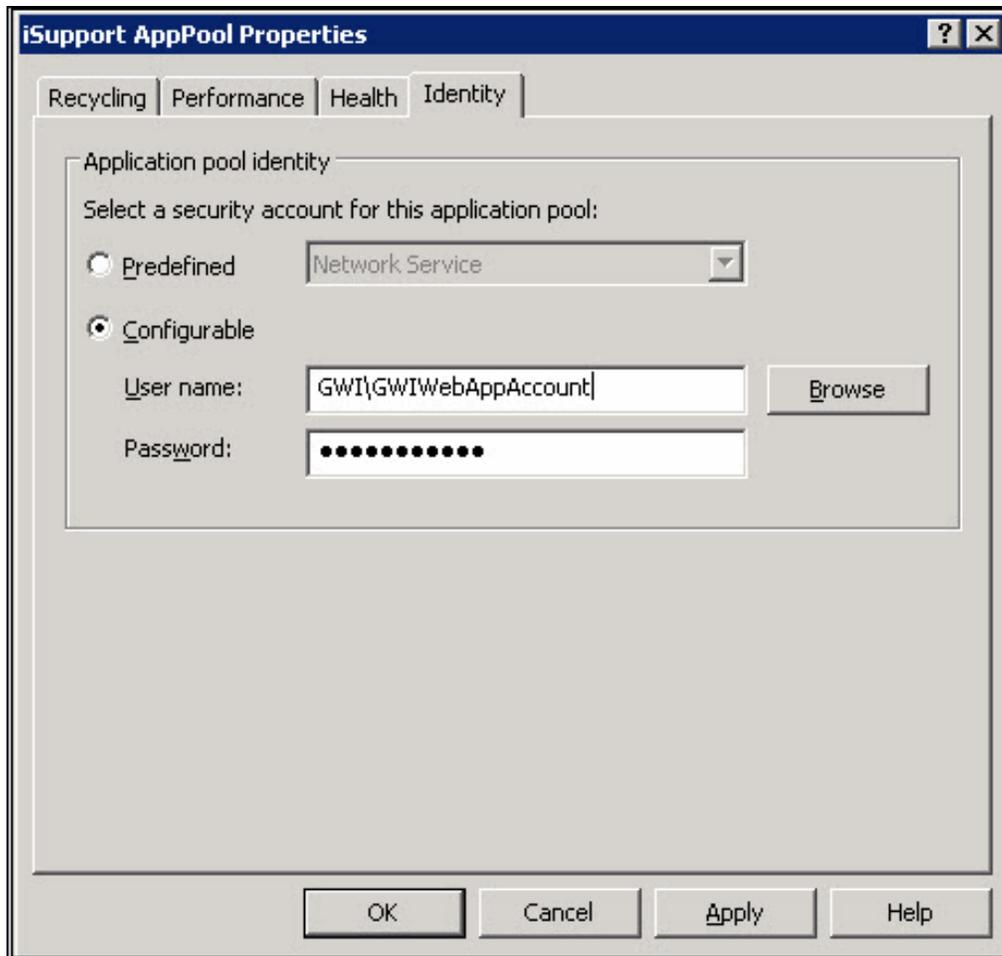
- 3 Select the Microsoft® Windows-based radio button in the Desktop Settings section. Then click OK.



A warning message appears; click OK.

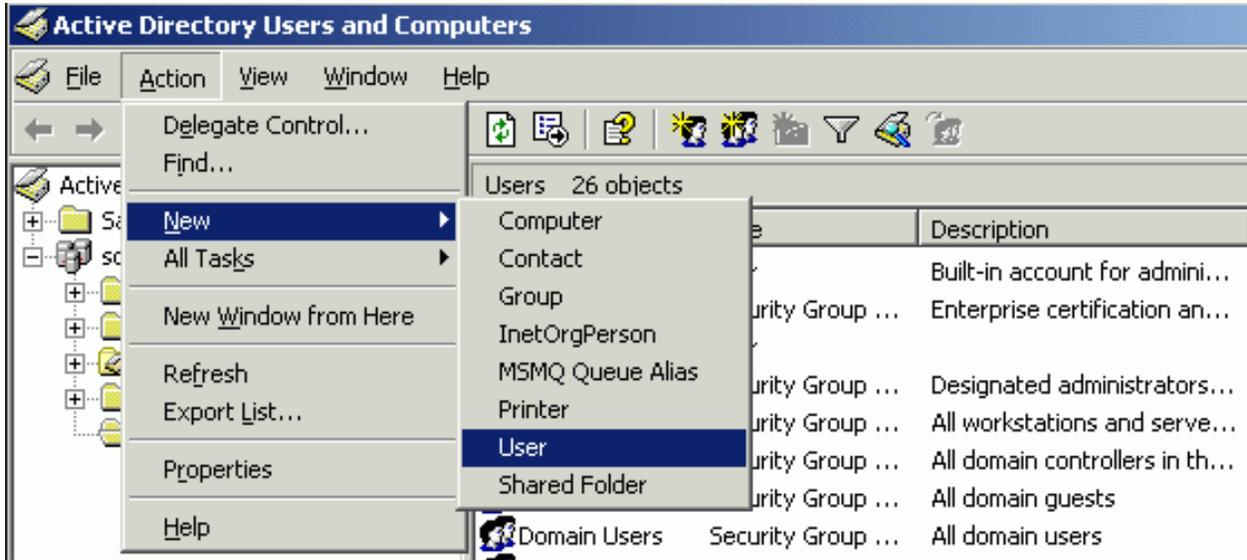
- 4 Do one of the following to facilitate communication across the domain:
 - If you have a domain user account that can be associated with the iSupportAppPool:
 - a In Computer Management, navigate to Internet Information Services (IIS) Manager | Application Pools and open the Properties for the iSupportAppPool.
 - b On the Identity tab, select the Configurable radio button. Click the Browse button and select the appropriate domain location. Then enter the domain user account

(GWIWebAppAccount in this example). Enter the proper password and click OK.



- If you do not have a domain user account to associate with the iSupportAppPool:
 - a Open Active Directory Users and Computers (located on any Active Directory domain controller) by selecting Start | Programs | Administrative Tools | Active Directory Users and Computers. Create a Domain User account in the organizational unit of your choice

by selecting Action | New | User.

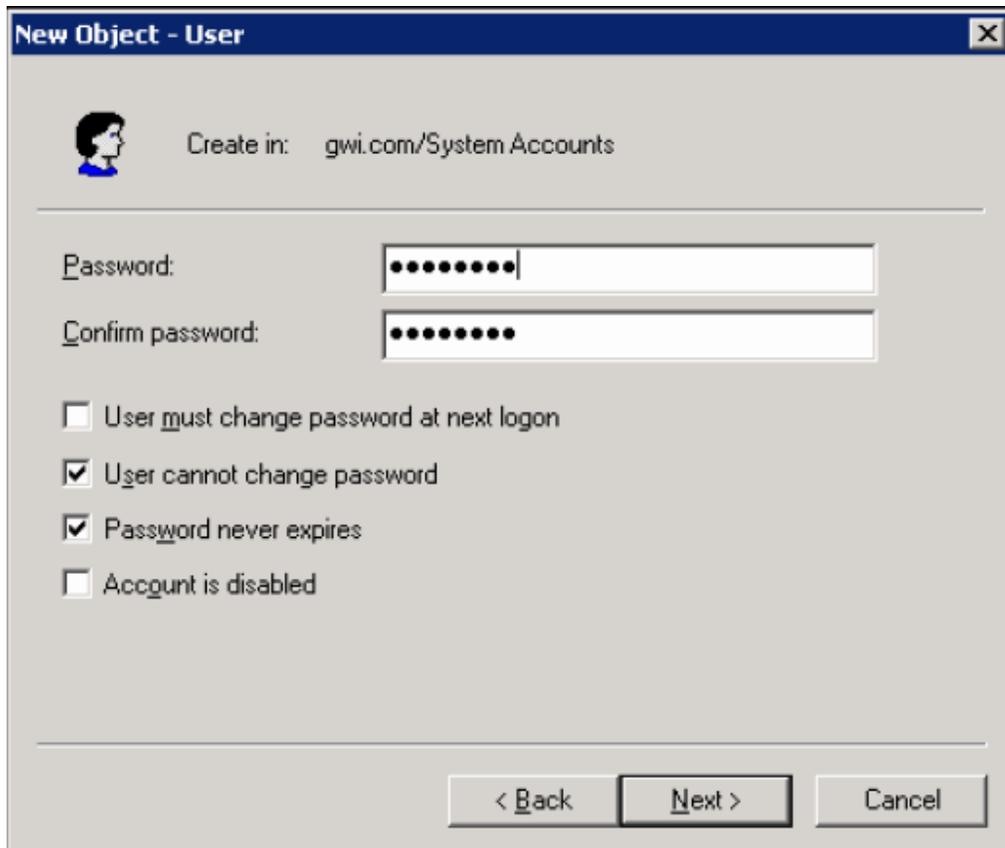


- b Complete the fields in the New Object - User dialog. A suggested name would be a first name of GWI, last name of WebAppAccount, and a login of GWIWebAppAccount. (This name will be used in the following steps.) Click Next.



- c Set an appropriate password, clear the User Must Change Password at Next Logon checkbox, and select the User Cannot Change Password and Password Never Expires

checkboxes. Click Next and then click Finish.



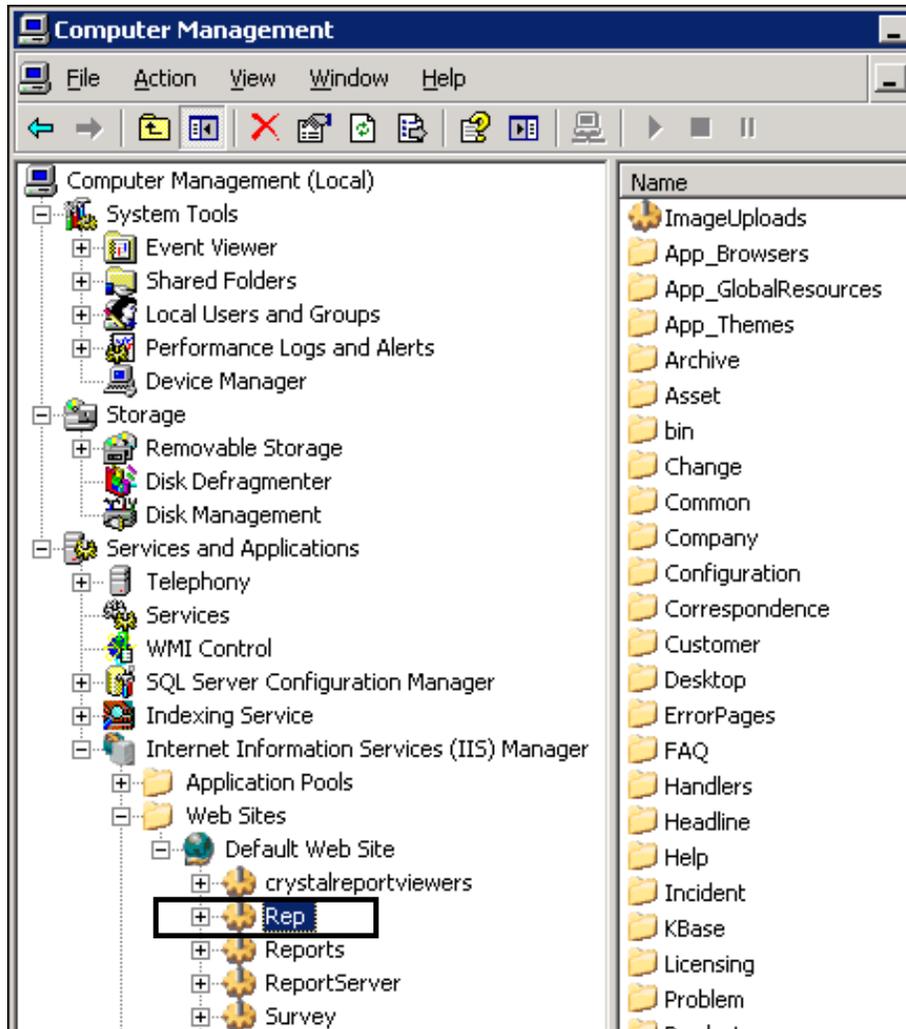
The screenshot shows a Windows dialog box titled "New Object - User". At the top left is a user icon. To its right, it says "Create in: gwi.com/System Accounts". Below this are two password input fields. The first is labeled "Password:" and the second is labeled "Confirm password:". Both fields contain a series of dots, indicating the password is masked. Below the password fields are four checkboxes with the following labels: "User must change password at next logon" (unchecked), "User cannot change password" (checked), "Password never expires" (checked), and "Account is disabled" (unchecked). At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

- 5 To identify the user to IIS and iSupport, set up the Rep virtual directory in IIS to use Windows Integrated Authentication and disallow Anonymous access. If iSupport is installed on Windows 2003 server, follow the steps below. If iSupport is installed on Windows 2008 server, see page ["Windows 2008 Server - Configuring the Rep Virtual Directory"](#) on page 231.

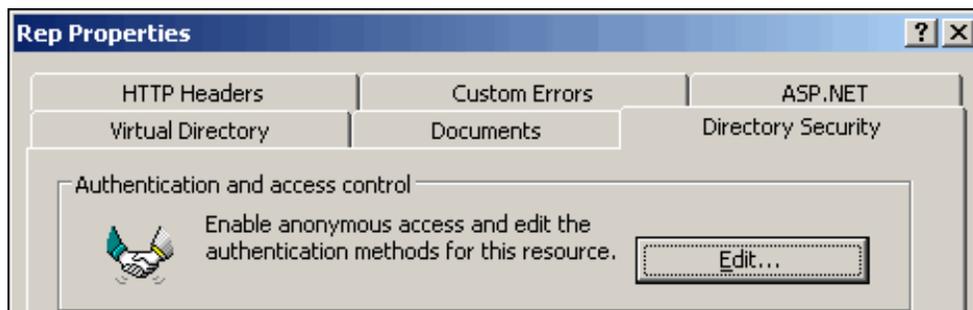
Windows 2003 Server - Configuring the Rep Virtual Directory

- 1 From the Start menu, select Programs | Administrative Tools | Computer Management. Expand the Services and Applications section and then expand the Internet Information Services and

Default Web Site sections (or the web site in which you have installed iSupport). Right-click on the Rep folder and select Properties.



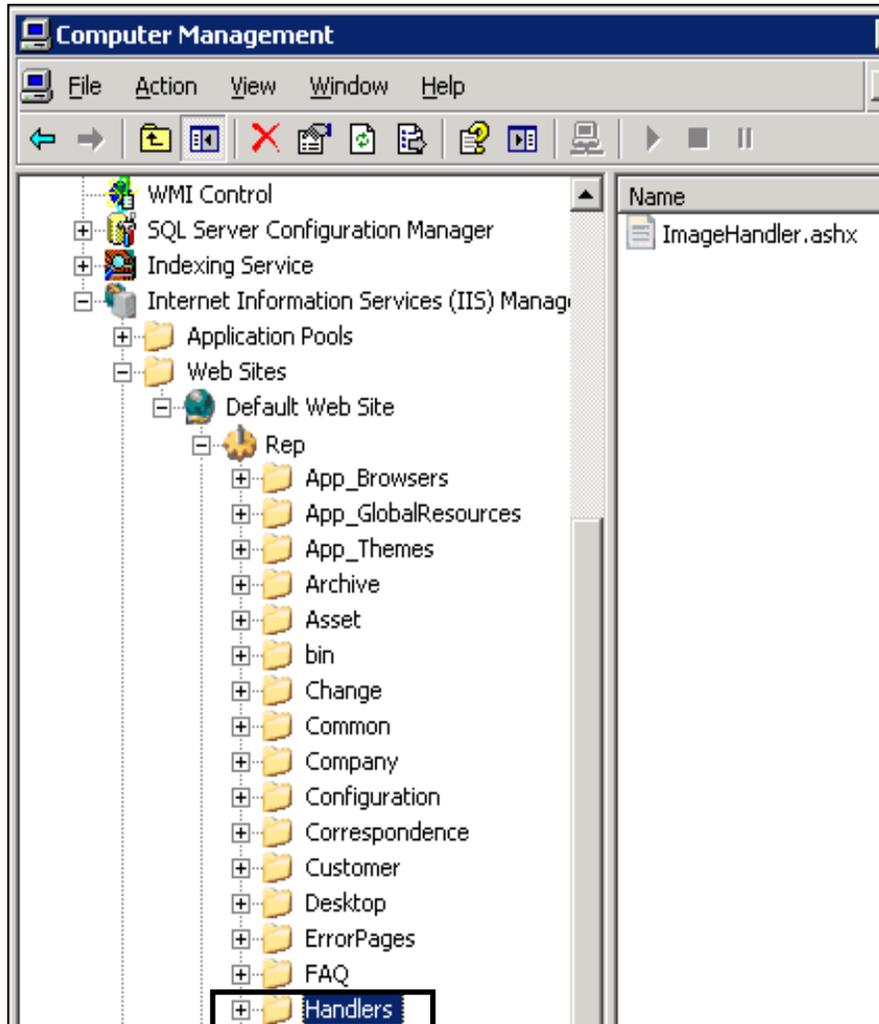
- 2 In the Rep Properties dialog, select the Directory Security tab and click the Edit button in the Authentication and Access Control section.



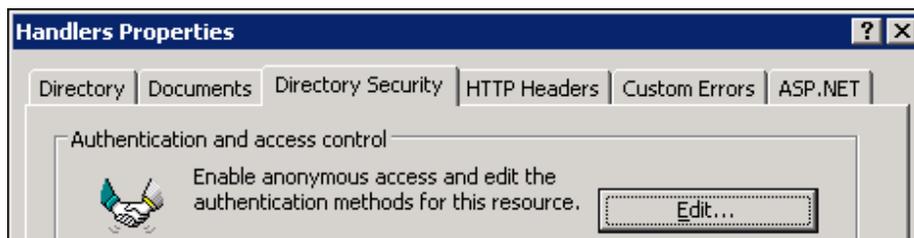
- 3 In the Authentication Methods dialog, clear the Enable Anonymous Access checkbox and select the Integrated Windows Authentication checkbox in the Authenticated Access section. Click OK. Then click OK in the Rep Properties dialog.



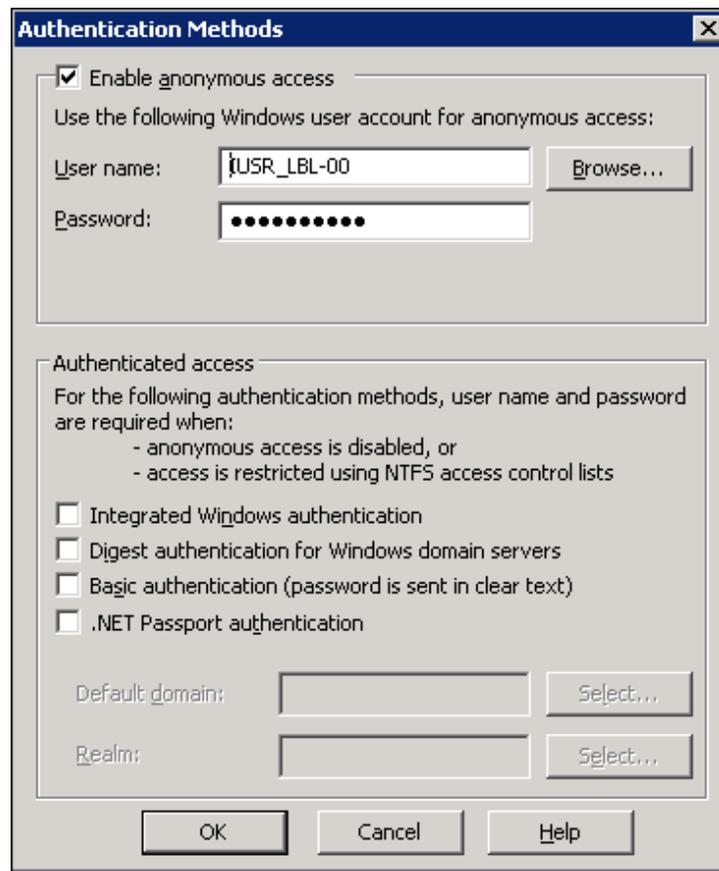
- Expand the Rep folder (which may be named differently during installation) and right-click on the Handlers folder. Select Properties.



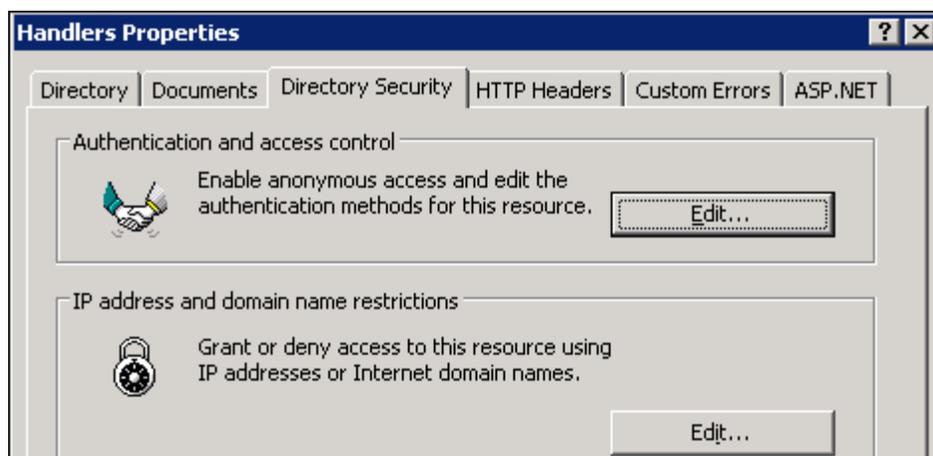
- In the Handlers Properties dialog, click on the Directory Security tab. In the Authentication and Access Control section, click the Edit button.



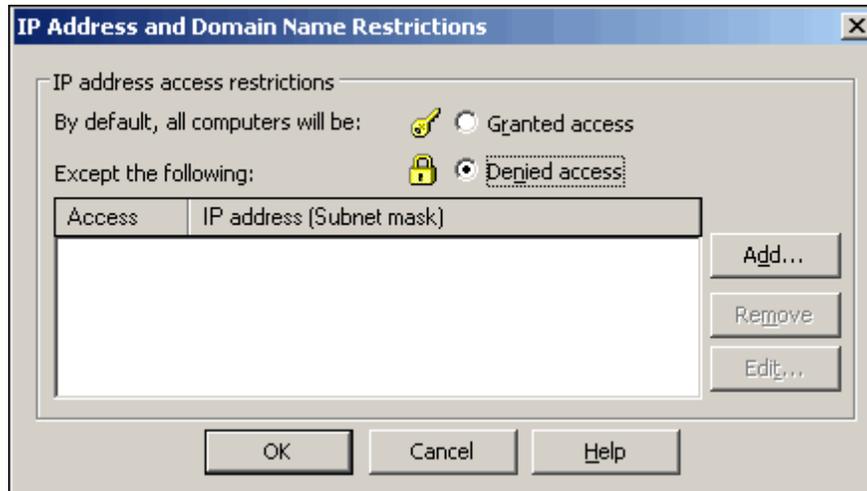
- 6 In the Authentication Methods dialog, select the Enable Anonymous Access checkbox and ensure that the Integrated Windows Authentication checkbox is cleared. Click OK.



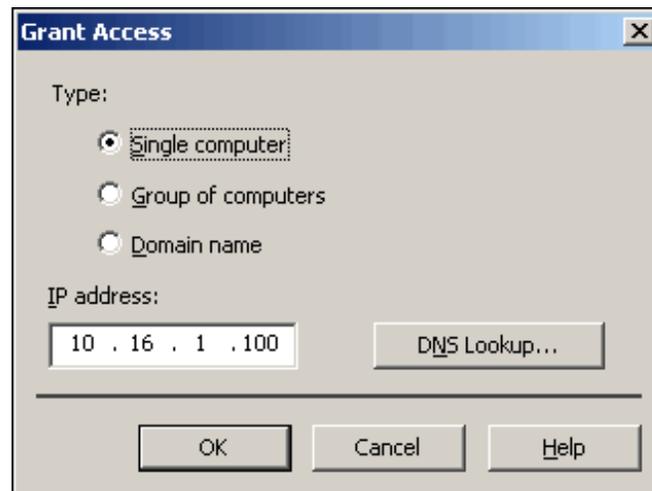
- 7 OPTIONAL - If you wish to enable IP address and domain restrictions:
- a Click the Edit button in the IP Address and Domain Name Restrictions section in the Handlers Properties dialog.



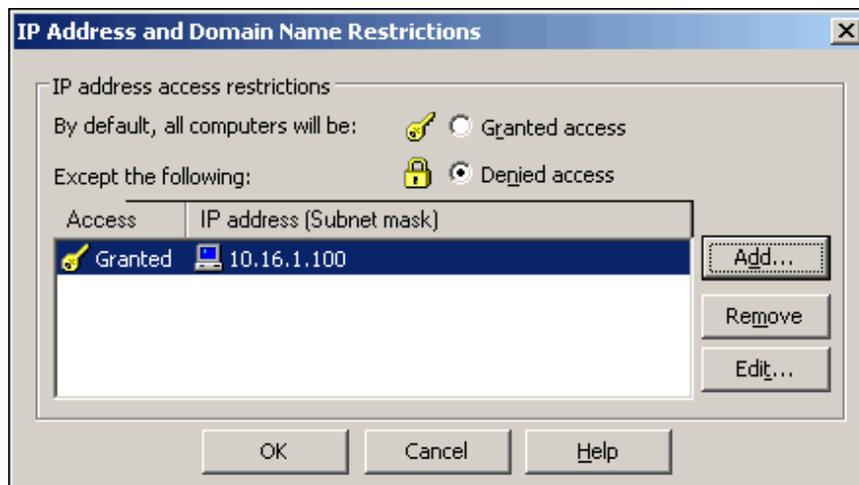
- b In the IP Address and Domain Name Restrictions dialog, select Denied Access and click the Add button.



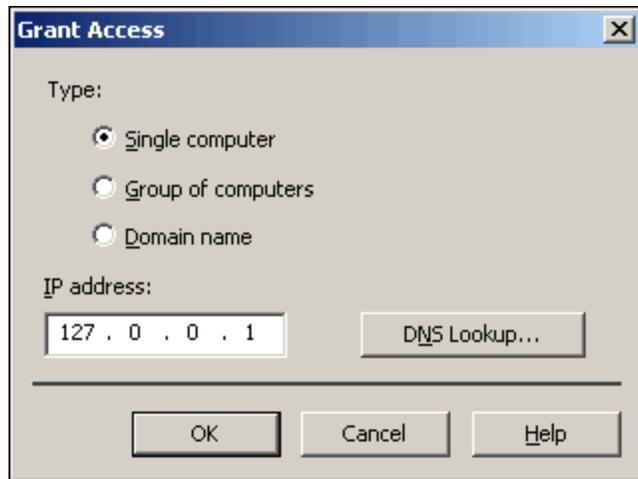
- c In the Grant Access dialog, enter the IP address of the server on which the EUD is installed. Click OK.



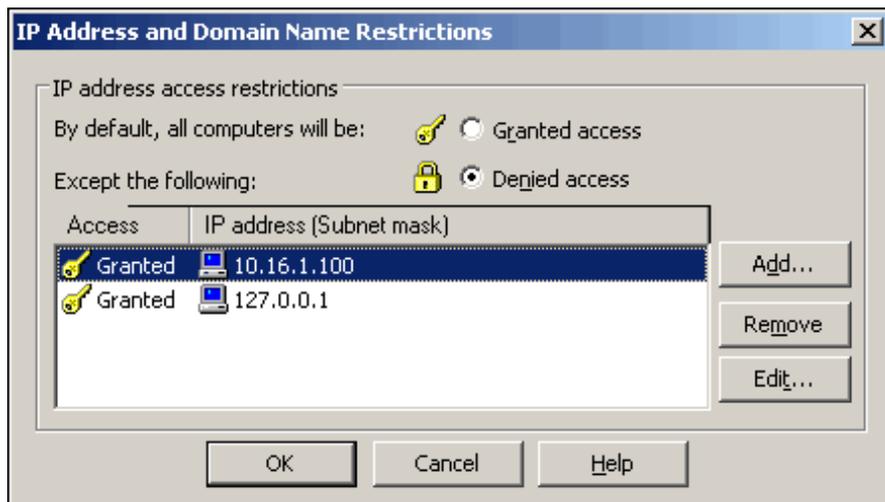
- d In the IP Address and Domain Name Restrictions dialog, click the Add button.



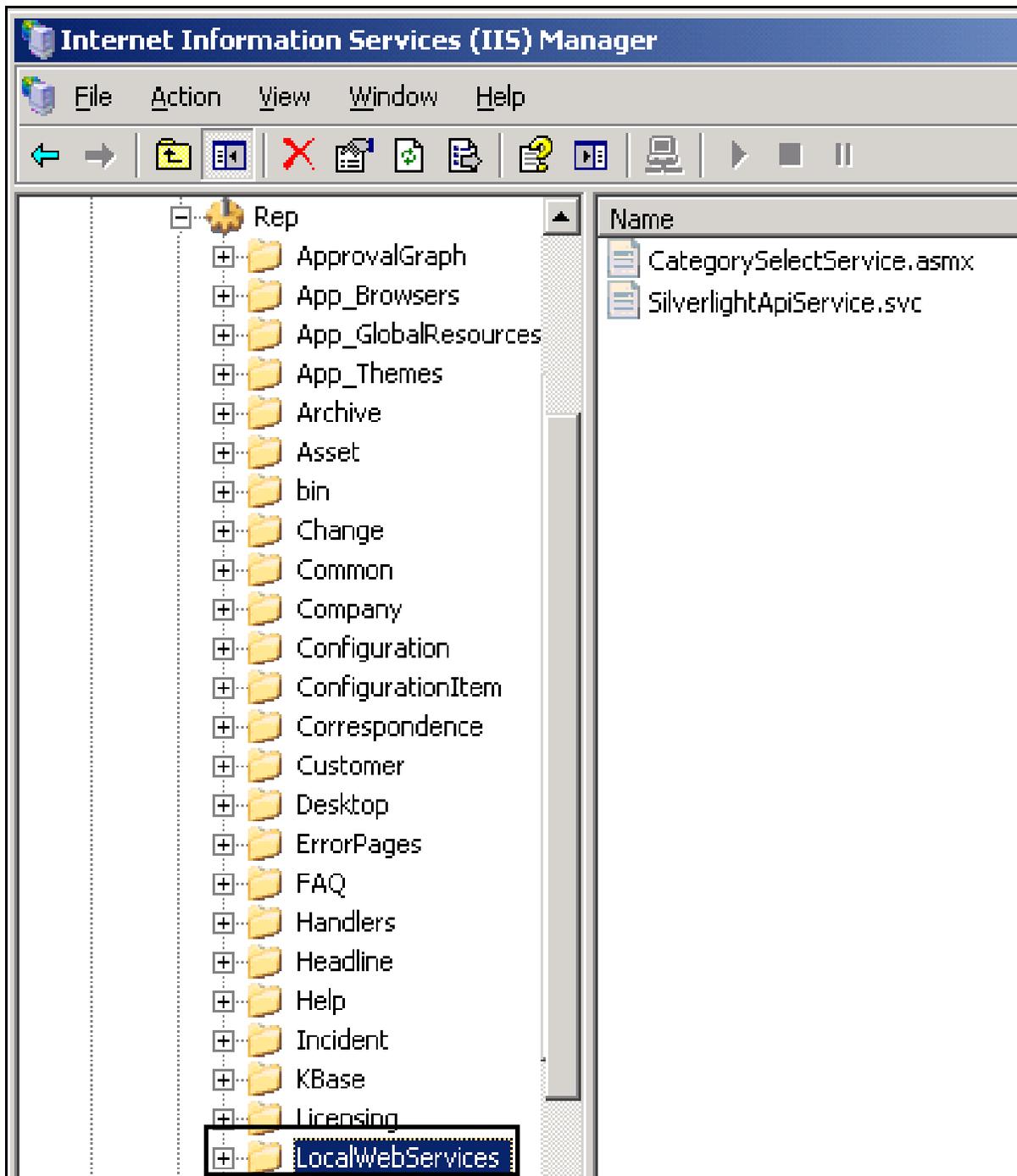
- e In the Grant Access dialog, enter the localhost IP Address (127.0.0.1). Click OK.



- f Click OK in the IP Address and Domain Name Restrictions dialog and the WebServices Properties dialog.



- Expand the Rep folder (which may be named differently during installation) and right-click on the LocalWebServices folder. Select Properties.



- 9 In the LocalWebServices Properties dialog, click on the Directory Security tab. In the Authentication and Access Control section, click the Edit button.



- 10 In the Authentication Methods dialog, select the Enable Anonymous Access checkbox. Click OK.

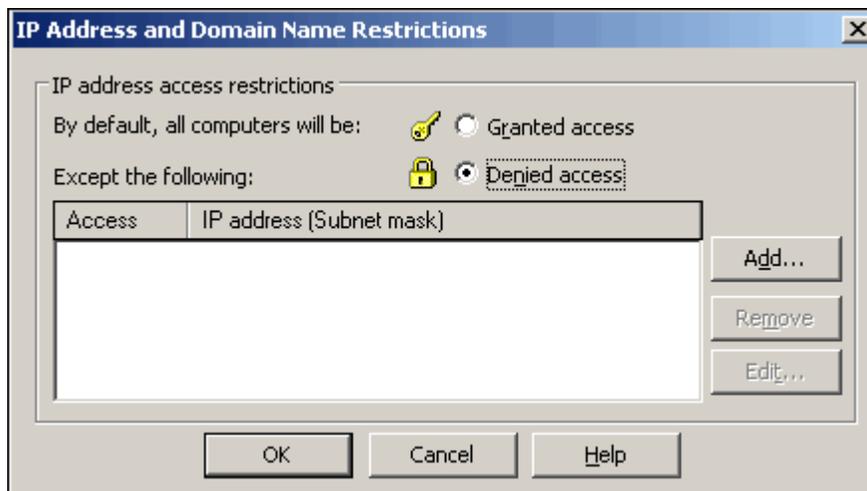


11 If you wish to enable IP address and domain restrictions, do the following:

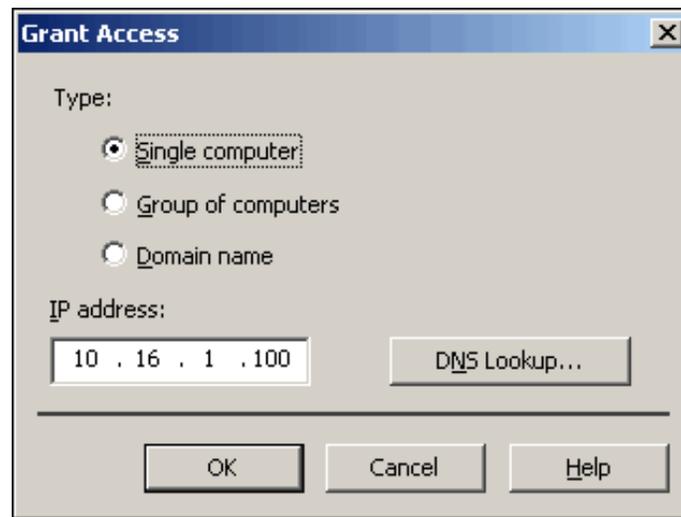
- a Click the Edit button in the IP Address and Domain Name Restrictions section in the WebServices Properties dialog.



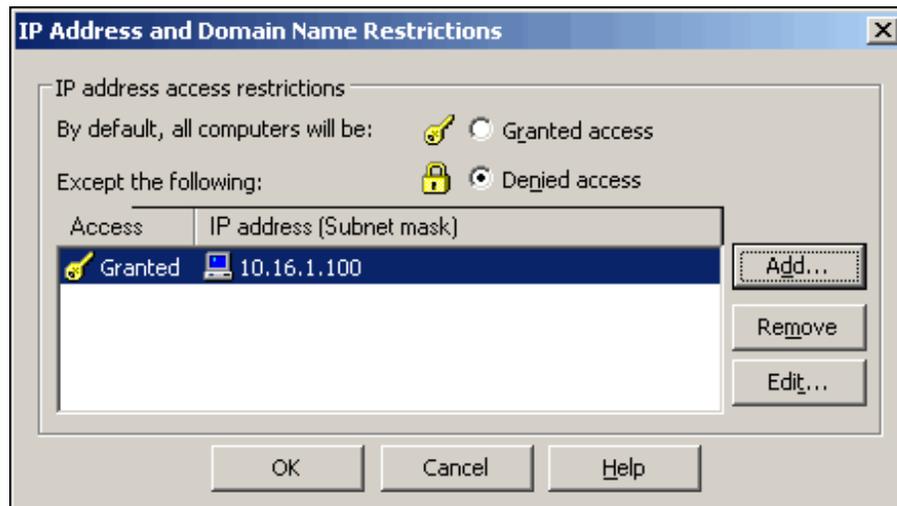
- b In the IP Address and Domain Name Restrictions dialog, select Denied Access and click the Add button.



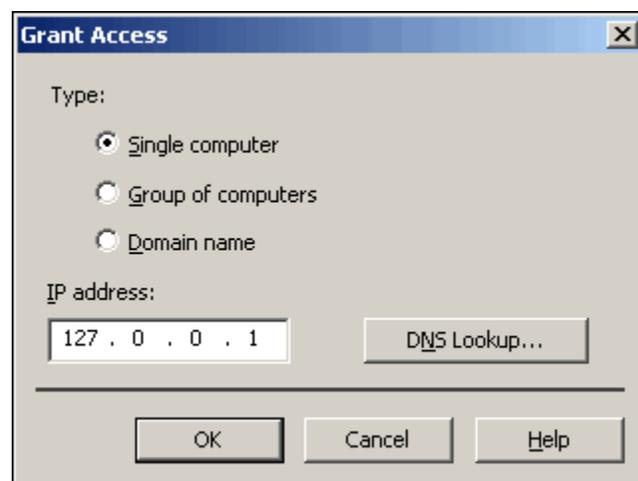
- c In the Grant Access dialog, enter the IP address of the server on which the EUD is installed. Click OK.



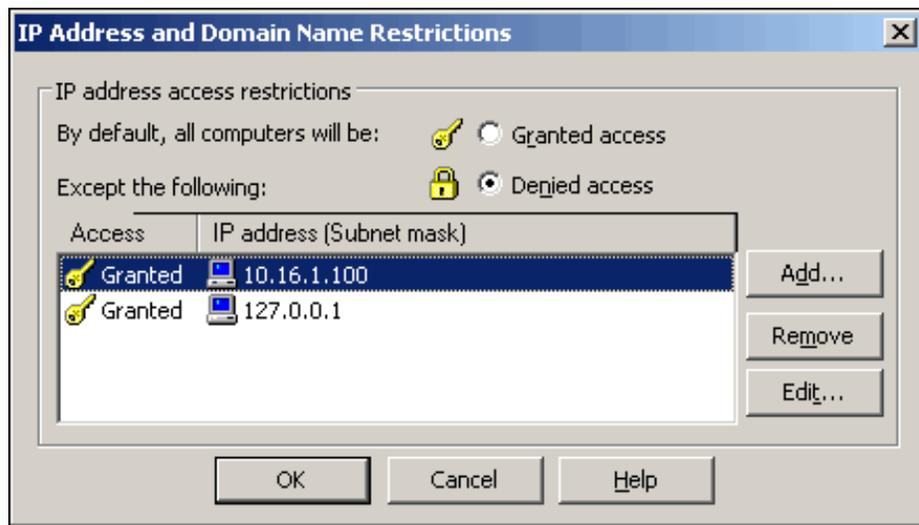
- d In the IP Address and Domain Name Restrictions dialog, click the Add button.



- e In the Grant Access dialog, enter the localhost IP Address (127.0.0.1). Click OK.



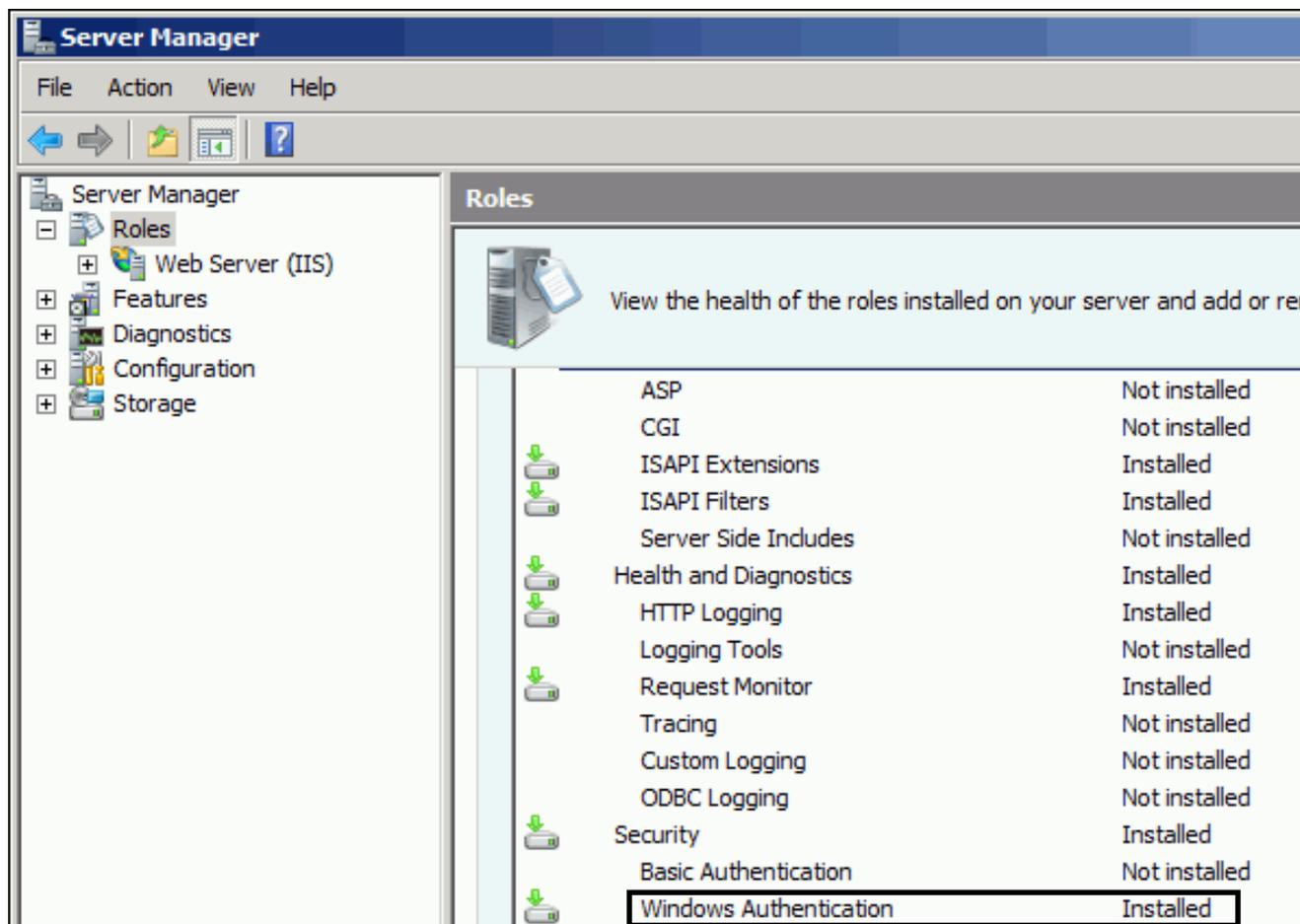
- f Click OK in the IP Address and Domain Name Restrictions dialog and the WebServices Properties dialog.



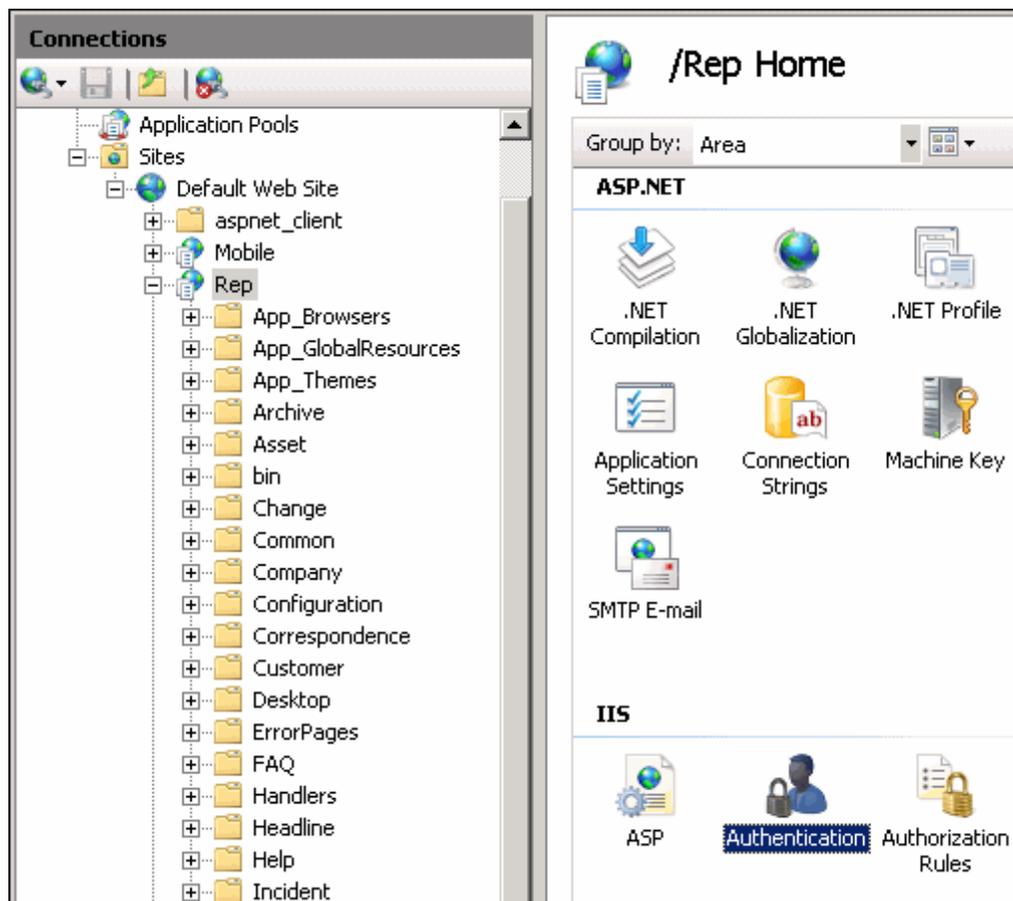
Windows 2008 Server - Configuring the Rep Virtual Directory

Do the following set up the Rep virtual directory in IIS to use Windows Integrated Authentication and disallow Anonymous access.

- 1 Ensure that the Windows Authentication role service is installed for Web Server (IIS).



- 2 Launch IIS Manager and expand Default Web Site. Click on Rep and then double-click on the Authentication icon.



- 3 Select Anonymous Authentication (currently enabled). On the Actions menu on the right, select **Disable**.



- 4 Select Forms Authentication (currently enabled) and then select Disable on the Actions menu.

The screenshot shows the 'Authentication' configuration page. The 'Group by' dropdown is set to 'No Grouping'. A table lists authentication methods with their status and response types. 'Forms Authentication' is selected and highlighted in blue. The 'Actions' menu on the right has 'Disable' highlighted with a black box.

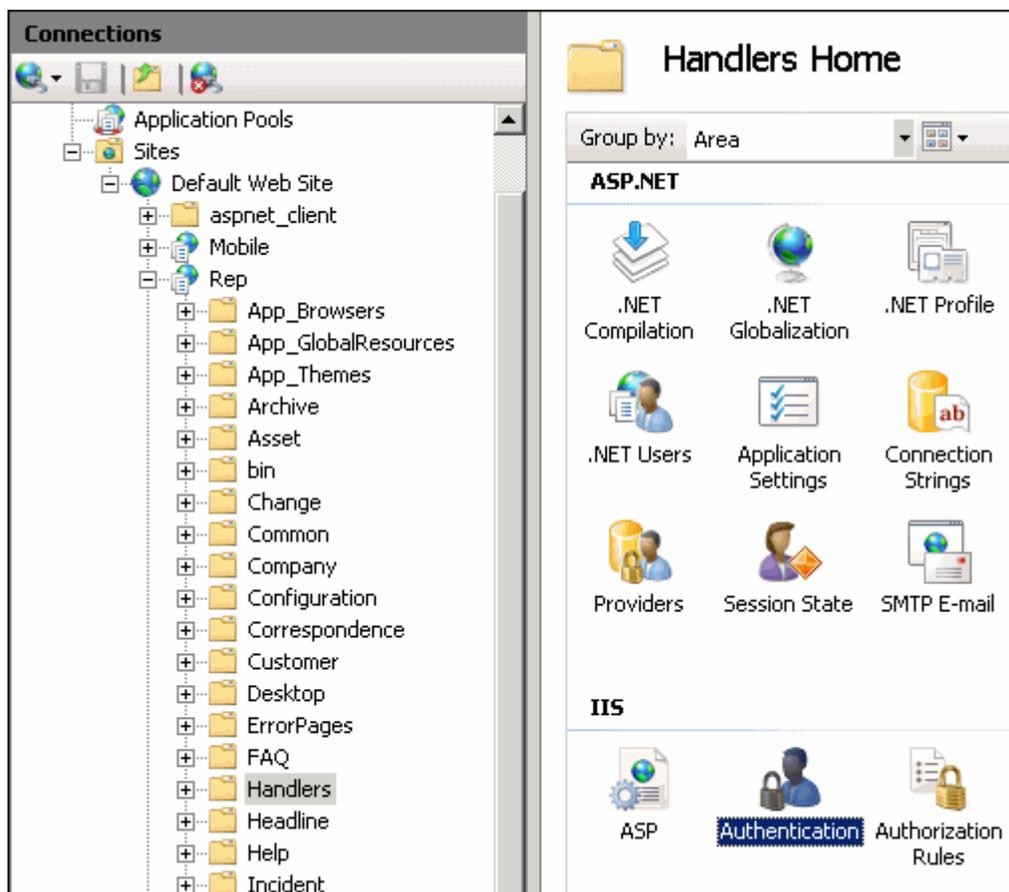
Name	Status	Response Type
Anonymous Authentication	Enabled	
ASP.NET Impersonation	Disabled	
Basic Authentication	Disabled	HTTP 401 Challenge
Digest Authentication	Disabled	HTTP 401 Challenge
Forms Authentication	Enabled	HTTP 302 Login/Redirect
Windows Authentication	Disabled	HTTP 401 Challenge

- 5 Select Windows Authentication (currently disabled) and then select Enable on the Actions menu.

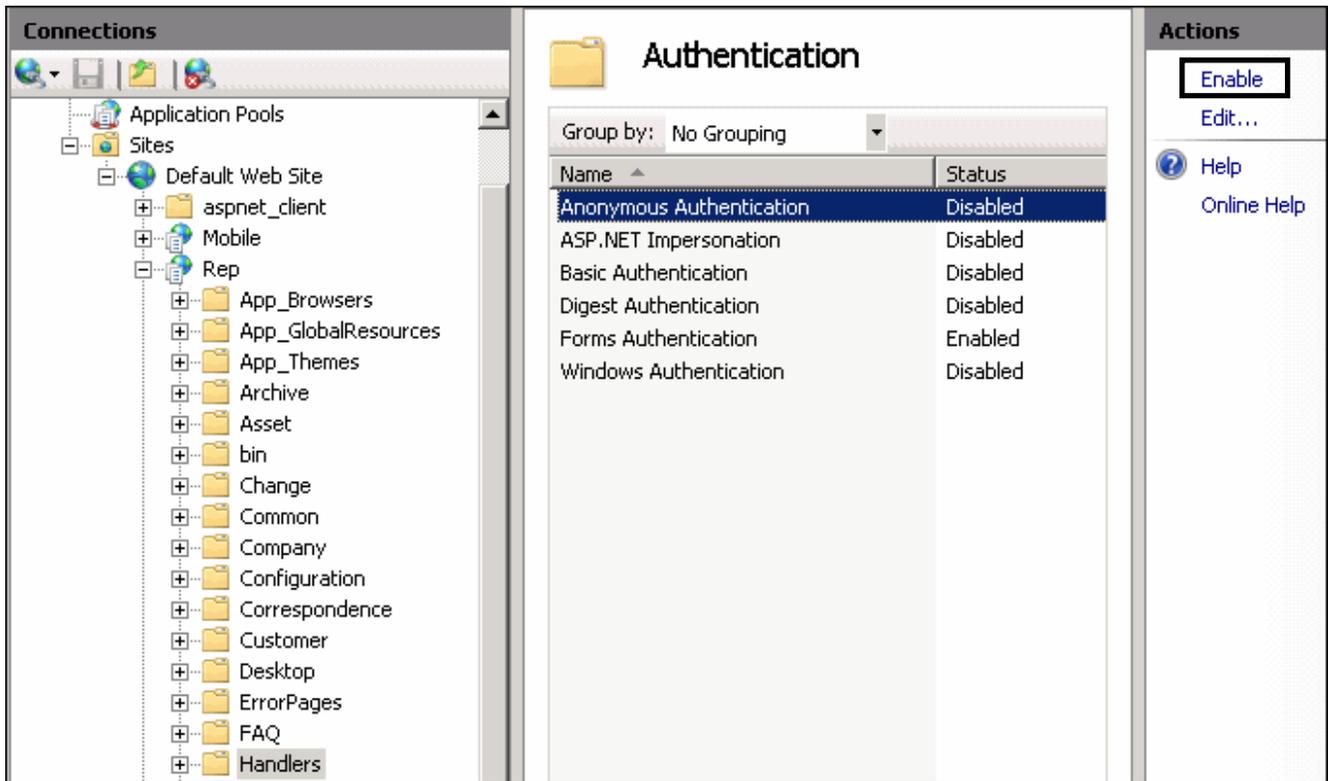
The screenshot shows the 'Authentication' configuration page. The 'Group by' dropdown is set to 'No Grouping'. A table lists authentication methods with their status and response types. 'Windows Authentication' is selected and highlighted in blue. The 'Actions' menu on the right has 'Enable' highlighted with a black box.

Name	Status	Response Type
Anonymous Authentication	Enabled	
ASP.NET Impersonation	Disabled	
Basic Authentication	Disabled	HTTP 401 Challenge
Digest Authentication	Disabled	HTTP 401 Challenge
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Disabled	HTTP 401 Challenge

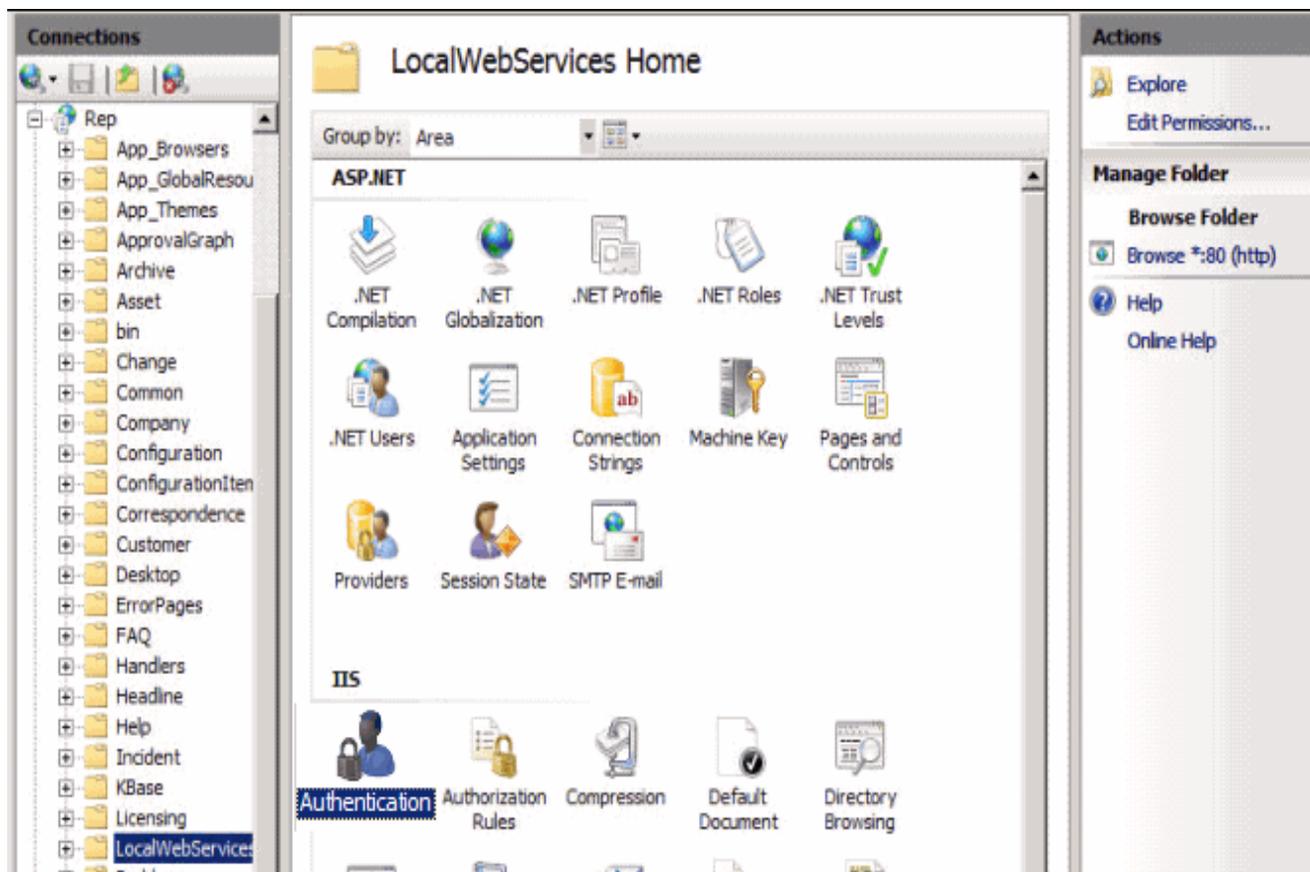
6 Select Handlers under Rep and double-click on Authentication.



- 7 The following screen appears; click on Anonymous Authentication (currently disabled). On the Actions menu on the right, select **Enable**.



8 Select LocalWebServices under Rep and double-click on **Authentication**.



9 Select Forms Authentication (currently disabled) and then select **Enable** on the Actions menu.

The screenshot displays the Connections console with the following components:

- Connections:** A tree view on the left showing a hierarchy of folders under 'Rep', including 'App_Browsers', 'App_GlobalResou', 'App_Themes', 'ApprovalGraph', 'Archive', 'Asset', 'bin', 'Change', 'Common', 'Company', 'Configuration', 'ConfigurationItem', 'Correspondence', 'Customer', 'Desktop', 'ErrorPages', 'FAQ', 'Handlers', 'Headline', 'Help', 'Incident', 'KBase', 'Licensing', and 'LocalWebServices'.
- Authentication:** A central pane showing a table of authentication providers. The 'Forms Authentication' row is selected and highlighted with a black box.
- Actions:** A right-hand pane with a 'Enable' button highlighted with a black box, and other options like 'Edit...', 'Help', and 'Online Help'.

Name	Status	Response Type
Anonymous Authentication	Disabled	
ASP.NET Impersonation	Disabled	
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Enabled	HTTP 401 Challenge

- 10 Click on Anonymous Authentication (currently disabled). On the Actions menu on the right, select **Enable**.

The screenshot displays the 'Authentication' configuration page in the iSupport Asset Administrator's Guide. The interface is divided into three main sections: 'Connections', 'Authentication', and 'Actions'.

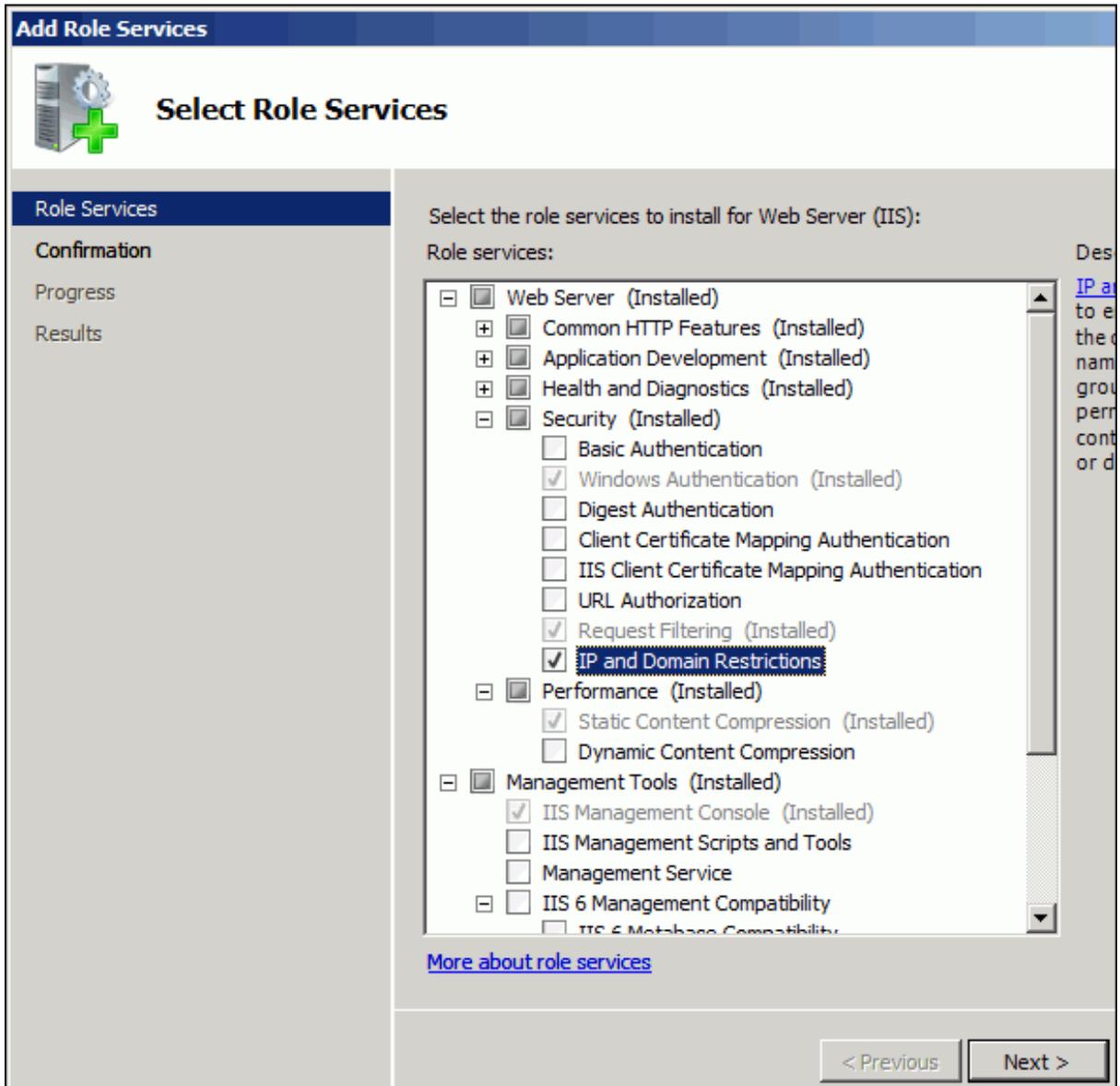
Connections: A tree view on the left shows a hierarchy of folders under 'Rep', including App_Browsers, App_GlobalResou, App_Themes, ApprovalGraph, Archive, Asset, bin, Change, Common, Company, Configuration, ConfigurationItem, Correspondence, Customer, Desktop, ErrorPages, FAQ, Handlers, Headline, Help, Incident, KBase, Licensing, and LocalWebServices.

Authentication: The main content area shows a table of authentication methods. The 'Group by' dropdown is set to 'No Grouping'. The table has three columns: 'Name', 'Status', and 'Response Type'. The 'Anonymous Authentication' row is selected and highlighted in blue.

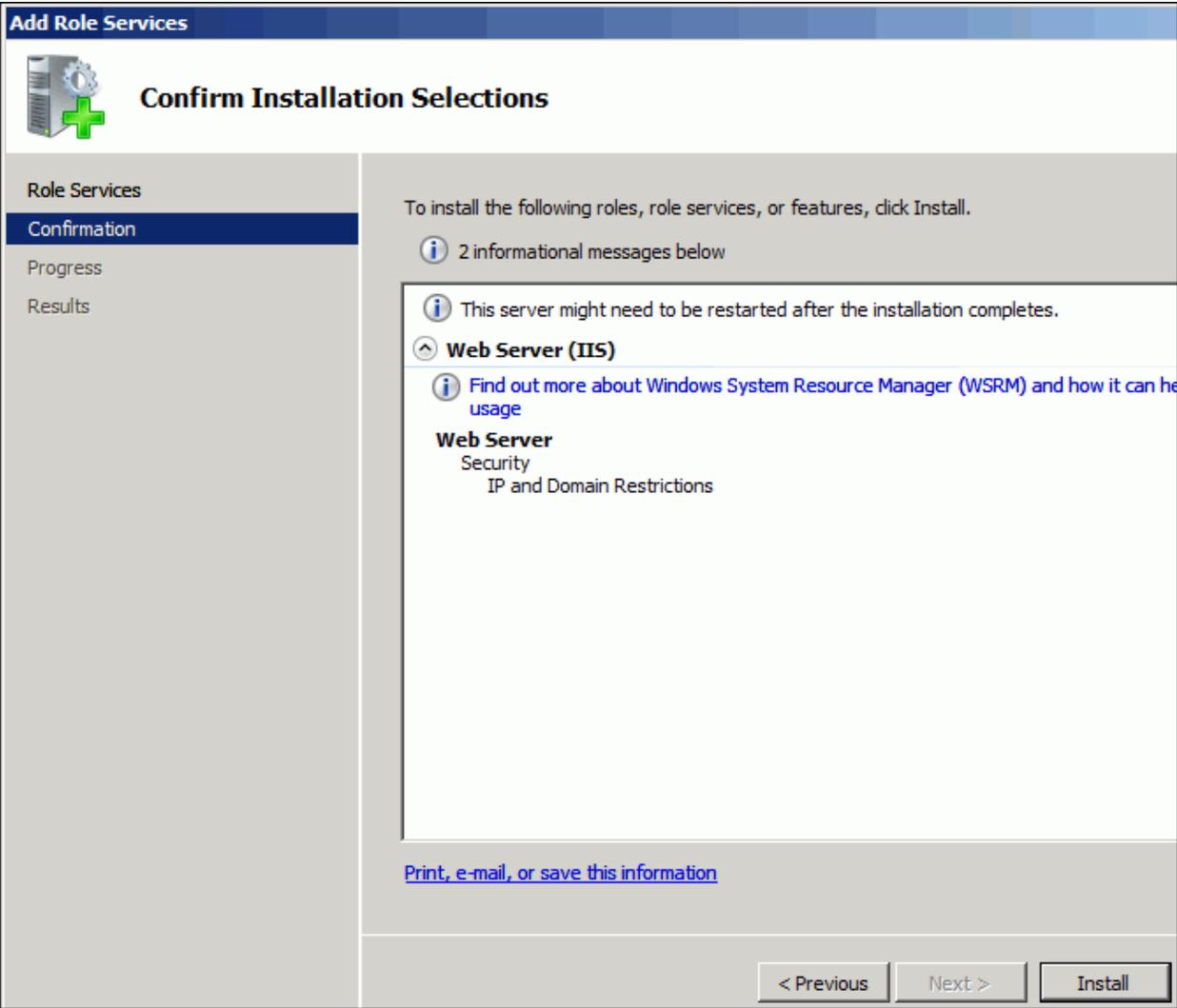
Name	Status	Response Type
Anonymous Authentication	Disabled	
ASP.NET Impersonation	Disabled	
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Enabled	HTTP 401 Challenge

Actions: A vertical menu on the right contains the following options: 'Enable' (highlighted with a red box), 'Edit...', 'Help' (with a question mark icon), and 'Online Help'.

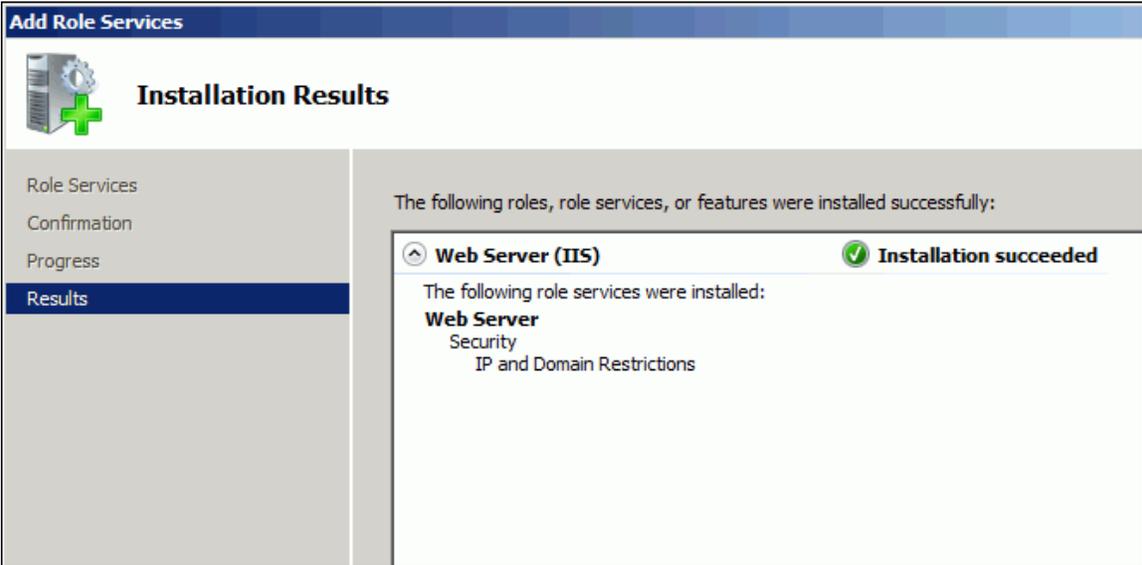
- 11 OPTIONAL: If you wish to enable IP and domain restrictions, launch Server Manager and select Role Services under Web Server (IIS). Expand Security, select IP and Domain Restrictions, and click Next.



The following appears; click Install.

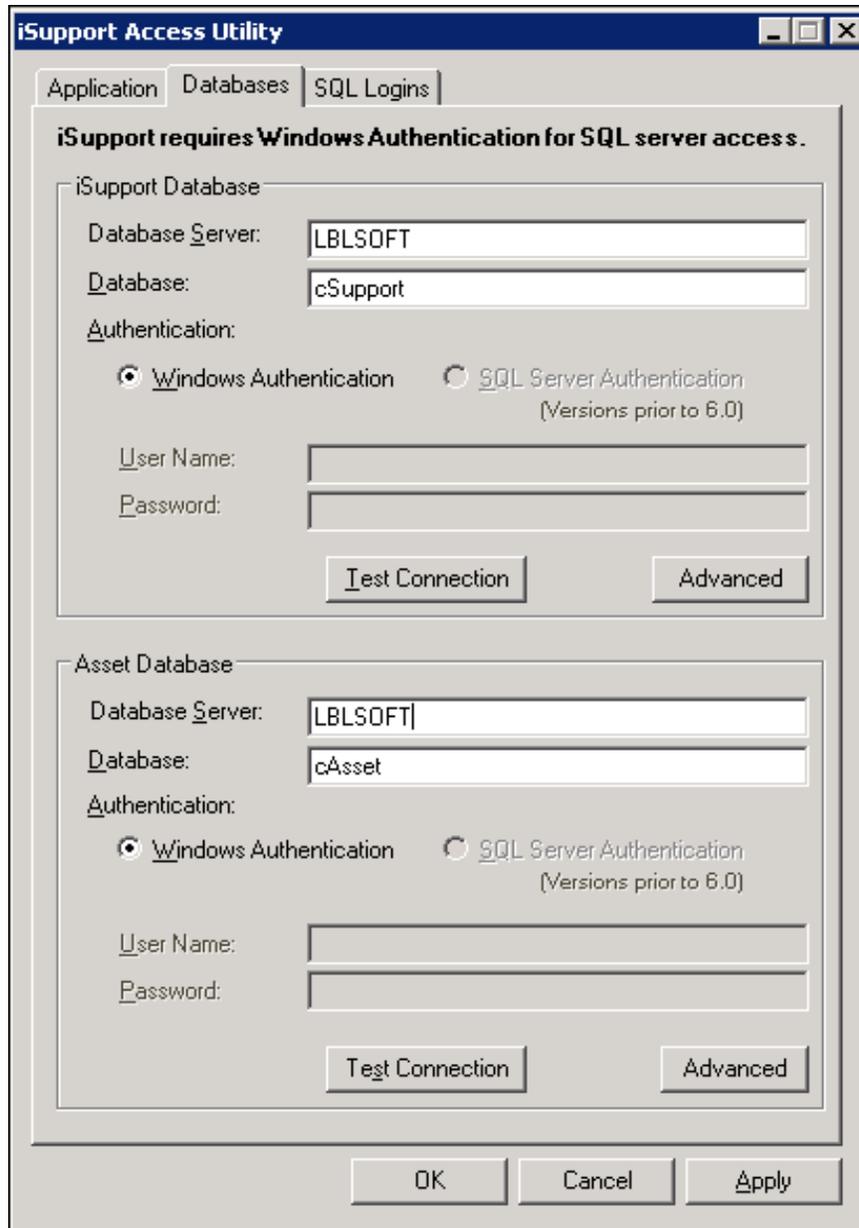


The following appears when the installation is complete.



Changing iSupport Asset's Access to SQL Databases

The iSupport Asset Access Utility in the <directory in which iSupport Asset is installed>\Utilities folder enables you to modify the SQL database, database server, and SQL login to the iSupport Asset databases. The installation process initially populates these fields on the Databases tab. Use the Advanced button to specify advanced properties.



9 Getting Help

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

Appendix I: Standard System Messages for Notifications

This chapter contains the standard messages in system-generated email notifications. You can customize these messages using the Custom Notification options in the Configuration module.

Alert Notification

Subject

[iSupport] <alert name> Alert Met

Standard Text

Threshold of <comparison type> <threshold> <data source> for <selected value to monitor> met.

Asset Notifications

Asset Maintenance Notification

Subject

[iSupport] Asset Maintenance Expiring on <expiration date>

Standard Text

The maintenance contracts for the following assets are set to expire on <expiration date>.

Notification sent to owner:

Asset Details:

Name: <asset name>

Type: <asset type>

Manufacturer: <asset manufacturer>

Model: <asset model number>

Tag Number: <asset tag>

Purchase Date: <purchase date>

Maintenance Expiration Date: <expiration date>

Warranty Expiration Date: <expiration date>

Notification sent to someone other than the owner:

<asset name> - Click the following link to view this asset:
<a href="<URL to asset record>"><URL to asset record>

Asset Warranty Notification

Subject

[iSupport] Asset Warranty Expiring on <expiration date>

Standard Text

The warranty for the following asset is set to expire on <expiration date>.

Notification sent to owner:

Asset Details

Name: <asset name>

Type: <asset type>

Manufacturer: <asset manufacturer>

Model: <asset model number>

Tag Number: <asset tag>

Purchase Date: <purchase date>

Maintenance Expiration Date: <expiration date>

Warranty Expiration Date: <expiration date>

Notification sent to someone other than the owner:

<asset name> - Click the following link to view this asset:
<a href="<URL to asset record>"><URL to asset record>

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