

Overview

The iSupport software is a powerful and flexible help desk/desktop support solution used by San José State University to manage information technology tickets, or “incidents.” While iSupport has many tools to enable you to report, sort, and filter information, as well as design custom views so that it’s suited to your particular work style, this guide will focus on the basics: opening, updating, and resolving tickets.

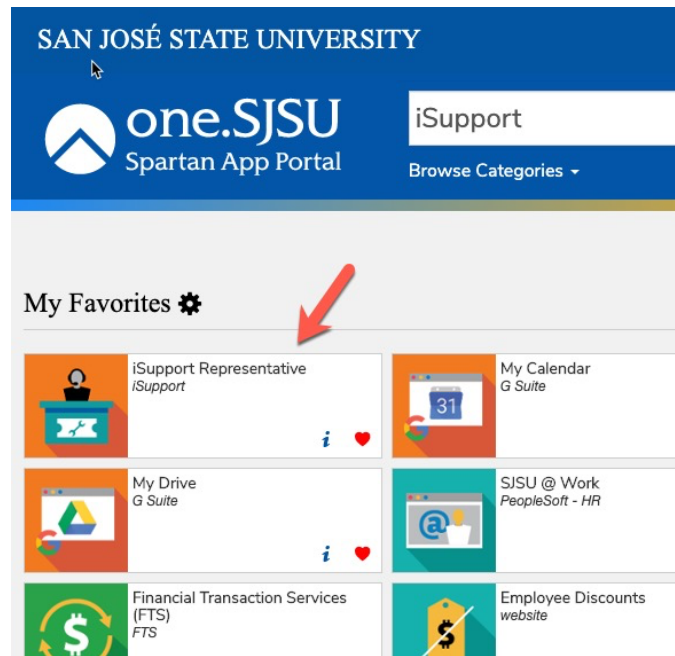
Table of Contents

Creating a New Incident	2
Updating an Incident	9
Responding to an Incident.....	11
Suspending or Unsuspending an Incident.....	14
Closing an Incident.....	16
Reopening an Incident	18
iSupport Dashboard Tips and Tricks.....	20
Quick Access.....	20
Creating a Personalized Dashboard.....	22
Adding a Quick Access icon to a Page.....	34

Creating a New Incident

Tickets are called Incidents in iSupport. In many cases, incidents can be created automatically by the customer using custom-built forms or by emailing their issue to the iSupport address, but you, the representative, also have the ability to create Incidents for your customers—and add new customers to the system if they are not already created. This section will take you through the process of creating a new incident and adding a new customer.

1. Navigate to one.SJSU.edu
 2. Search for iSupport Representative Tile.
- Click on the tile and log in with your SJSUOne ID and Password.



The iSupport Home View page displays.

NOTE: If you have previously changed your view to a custom view, you will automatically be signed in with that view.

The screenshot displays the iSupport Home View interface. At the top, there are navigation tabs for 'Home' and 'My View'. Below this, the 'My Open Incidents' section shows a table of incidents with columns for Status, Priority, Date Opened, Customer, and Description. The table lists two incidents: one 'Reopened' by Gadham, Roopa, and one 'Open' by Nguyen, Leon.

Below the incidents table, the 'My Group's Incidents by Assignee' section is visible. It features a list of assignees on the left, including Aldridge, Kim (2), Braverman, Phil (1), Campbell, Ryan (22), Chang, Steve Kwang-Soo, Coronado, Leticia (815), Day, Nancy (8), Dunefsky, Mike (19), Frank, Jeff (6), Hill, Katie (1), Ho, Vicky (1), and Hoang, Cecilia (104).

At the bottom of the page, a blue bar contains a green arrow icon pointing up. A dropdown menu is open, showing options for 'Create Incident' (with a sub-menu for Problem, Change, Purchase, Customer, Company, Knowledge Entry, Asset, Dynamic Asset Scan, Asset Scan Comparison, License Profile, Headline, FAQ, Service Contract, and Configuration Item) and 'Views/Charts' (with sub-options for Chart Designer, View Designer, Content Manager, and Reports). A black arrow points to the 'Create Incident' option, and another black arrow points to the green arrow icon in the blue bar.

3. Click the **More** (green arrow) icon.
4. Select **Create Incident**.

The New Incident Ticket page displays.

- Click the **Select Customer** (Magnifying Glass) icon.

The screenshot shows the 'New Incident Ticket' page. At the top, there's a navigation bar with 'Incident', 'New', and 'View' tabs. Below it is a toolbar with icons for Save, Save And Close, Print, Font Size, Add History, Add Asset, Categorize, Schedule, Route, Customer, Templates, and Hierarchy. The main content area is divided into two sections. On the left, there's a 'Customer' search box with a magnifying glass icon. On the right, there's a form for incident details, including Status (Open), Priority (Medium), Number (D7PJ164291), Assignee (Ryan Campbell), Created Date (7/24/2013 6:05:31 PM), Author (Ryan Campbell), Modified Date, Closed Date, and Followup Date (7/25/2013). Below the search box and details form, there's a section for 'Description' and 'Resolution' with text input areas. At the bottom, there's a navigation bar with icons for Details, History, Custom, Others to Notify, Assets, and Attachments.

The customer search box displays.

- Type any part of the customer's name, email address, SJSU ID, or phone number to see a list of results. Click to select the customer.
- If the customer does not appear in the search, you will need to add a new customer. Click the **Advanced Search** icon.

NOTE: In your configuration, you can add a New Customer quick link to the Customer field. See the Configuration section of the guide for details.

The screenshot shows the 'New Incident Ticket' page with the 'Customer' search box active. The search box contains the text 'Mxyzptlk' and shows 'No matches found.' A tooltip 'Open advanced search in new window' is visible next to the search box. The page also shows incident details like Status (Open), Priority (Medium), and Number (D7WD343A48). Below the search box and details form, there's a section for 'Description' and 'Resolution' with text input areas. At the bottom, there's a navigation bar with icons for Details, History, Custom, Others to Notify, Assets, and Attachments.

The Select Customer Advanced Search box displays.

8. Click **Create New Customer**.

The Search box updates with the New Customer form

9. Enter the customer's information, including **First Name**, **Last Name**, **Phone**, and **Email**.
10. Enter the customer's SJSU ID in the **Customer ID** field.
11. Click **OK**

The New Incident window updates with the Customer information.

12. Select the **Incident Priority**.
- **Low:** Incidents for problems that have workarounds or do not stop work
 - **Medium:** Incidents that restrict some job functions
 - **High:** Incidents that stop work for at least one customer, or have urgent deadlines
 - **Emergency:** Reserved for failed systems that stop critical work for multiple customers

13. Select the **Incident Category**. If you are not certain which category to use, select Other > Other.

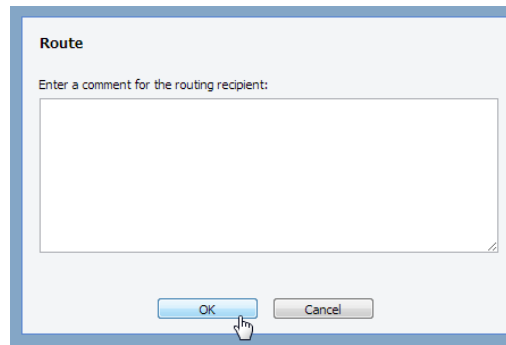
The screenshot shows a web application window titled "Change Assignee's Group". On the left, there is a form with the following fields: "Assignee" (Ryan Campbell), "Created Date" (7/24/2013 6:05:31 PM), "Author" (Ryan Campbell), "Modified Date" (7/30/2013 1:29:45 PM), "Closed Date" (7/25/2013 2:21:18 PM), and "Followup Date" (7/31/2013). On the right, the "Category" dropdown menu is open, showing a tree structure with "Other" selected. The tree includes "Hardware", "Identity & Information Security", "Other" (which is expanded to show "Junk Ticket", "Other", and "Unable to Categorize"), "Server Based Apps (Script)", "Software", "Unified Communication", and "Unit Specific". At the bottom right, there are radio buttons for "Incident" (selected) and "All".

14. Select the **Incident Assignee** by clicking Assignee, typing any part of the assignee's name, and selecting the desired person or group. You can also click the **Tree Selector** to pick the assignee from a list.

The screenshot shows the same "Change Assignee's Group" window. The "Assignee" dropdown menu is open, showing a list of options. The first option is "AAA 795-INFO Help Desk". Below it, there is a "Tree Selector" button. The list continues with "AAA AAA - Help Desk Unassigned Ticket Queue", "AAA Classroom Technology Support Queue", "AAA Help Desk", "AAA Hum. & Arts, Desktop Support", "AAA Information Support Svcs", "AAA iSupport Tech Queue", and "AAA ITS - Business Desk". The "Category" dropdown is also open, showing "Other" selected, with "Rule Group" and "Default Service Level Agreement" visible below it.

The Route comment box displays.

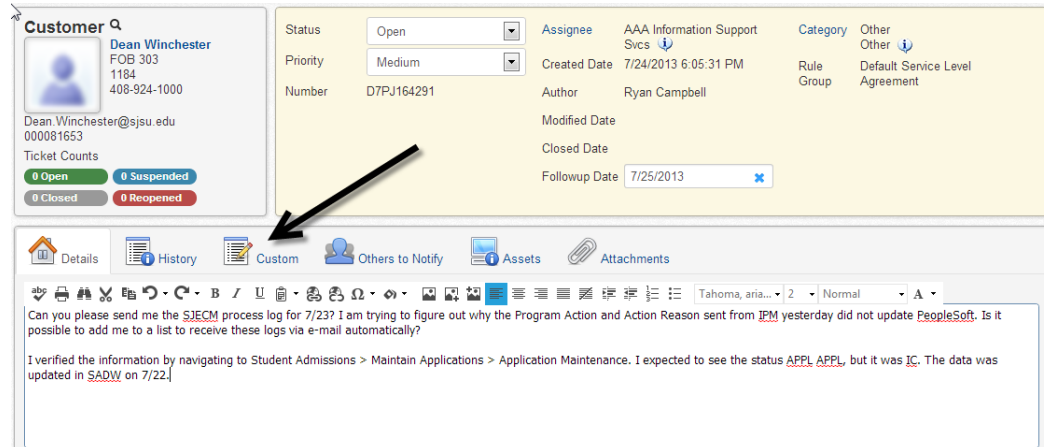
15. If you wish to enter a comment for the person to whom you are assigning the ticket, you can do so here. This step is optional. Click **OK**.

A small dialog box titled "Route" with a text area for entering a comment for the routing recipient. It has "OK" and "Cancel" buttons at the bottom.

The New Incident window updates with the Assignee information.

16. In the **Description** field, enter a detailed summary of the problem or request, including the steps that caused the problem and any error messages received.

17. Click the **Custom** icon.

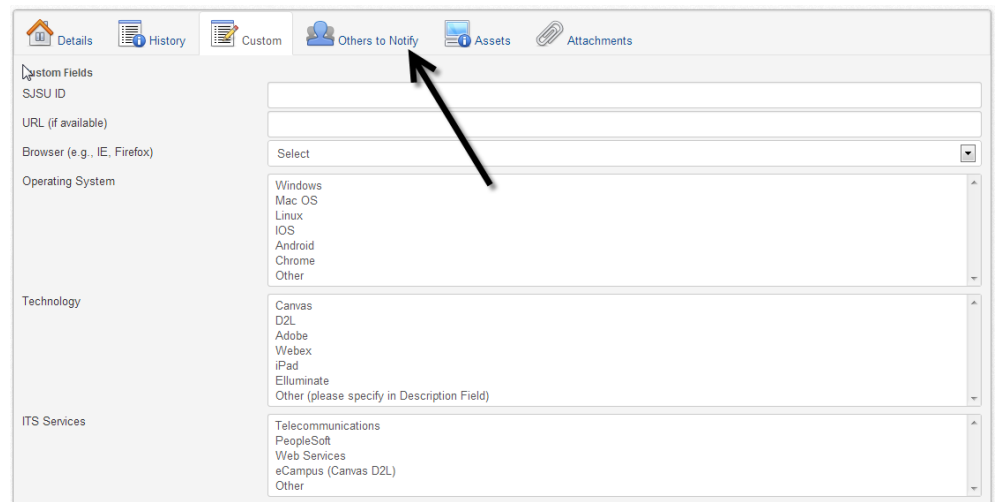
A screenshot of the "New Incident" window. The top section shows customer information for Dean Winchester and ticket details like Status (Open), Priority (Medium), and Number (D7PJ164291). The bottom section is the "Description" field, which contains a detailed problem report. An arrow points to the "Custom" icon in the toolbar below the description field.

The Custom Fields pagelet displays.

18. Enter any relevant information.

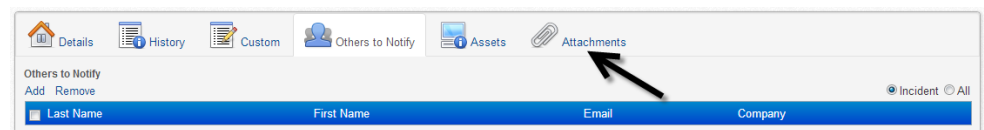
NOTE: This step is optional. Many incidents will not require the information on this page.

19. Click the **Others to Notify** icon.

A screenshot of the "Custom Fields" pagelet. It shows several input fields for "SJSU ID", "URL", "Browser", "Operating System", "Technology", and "ITS Services". An arrow points to the "Others to Notify" icon in the toolbar above the pagelet.

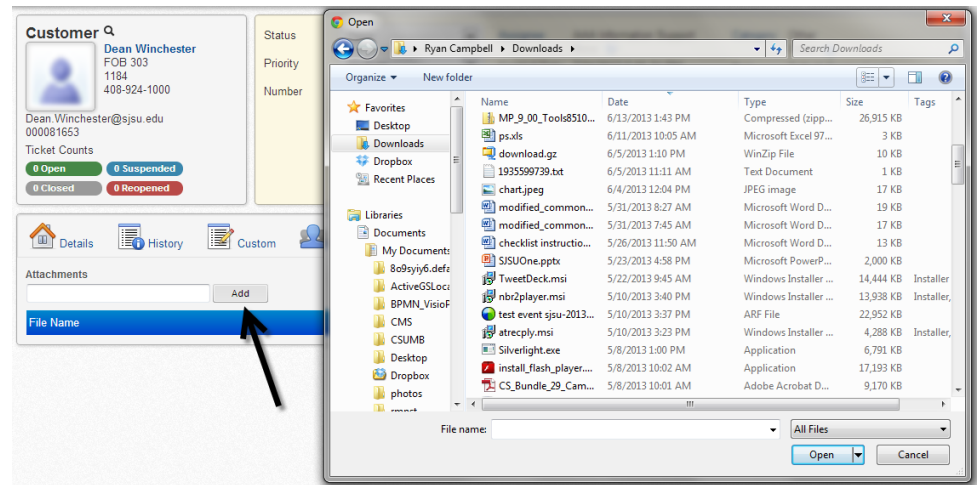
The Others to Notify pagelet displays.

20. If you wish to include any other assignees in the incident updates, click **Add** and select them from the list. Otherwise, click the **Attachments** icon.

A screenshot of the "Others to Notify" pagelet. It shows a table with columns for "Last Name", "First Name", "Email", and "Company". There are "Add" and "Remove" buttons above the table. An arrow points to the "Attachments" icon in the toolbar above the pagelet.

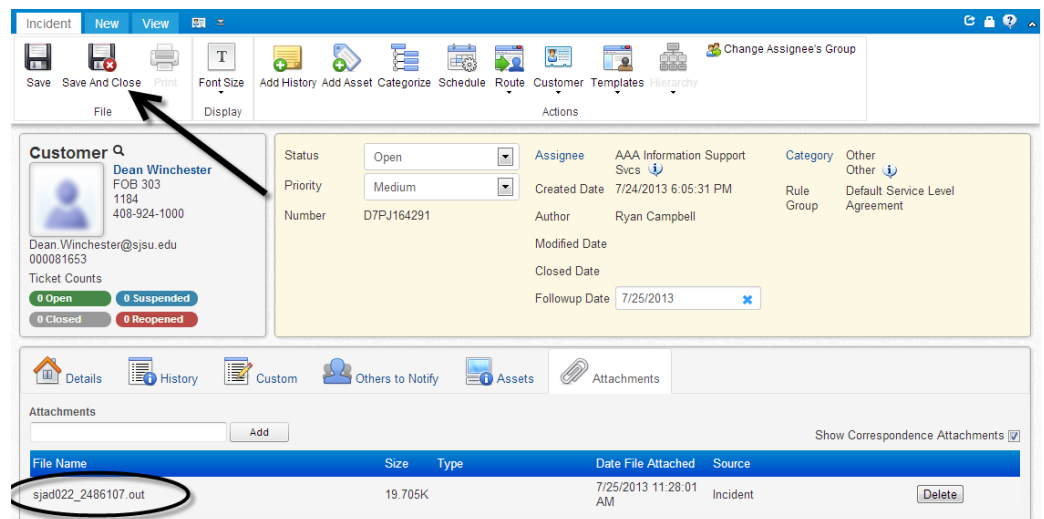
The Attachments pagelet displays.

21. If you have attachments to add, such as screenshots, trace files, or scanned forms, click **Add** to select them from your hard drive or network location.



Any added attachments should display in the list below.

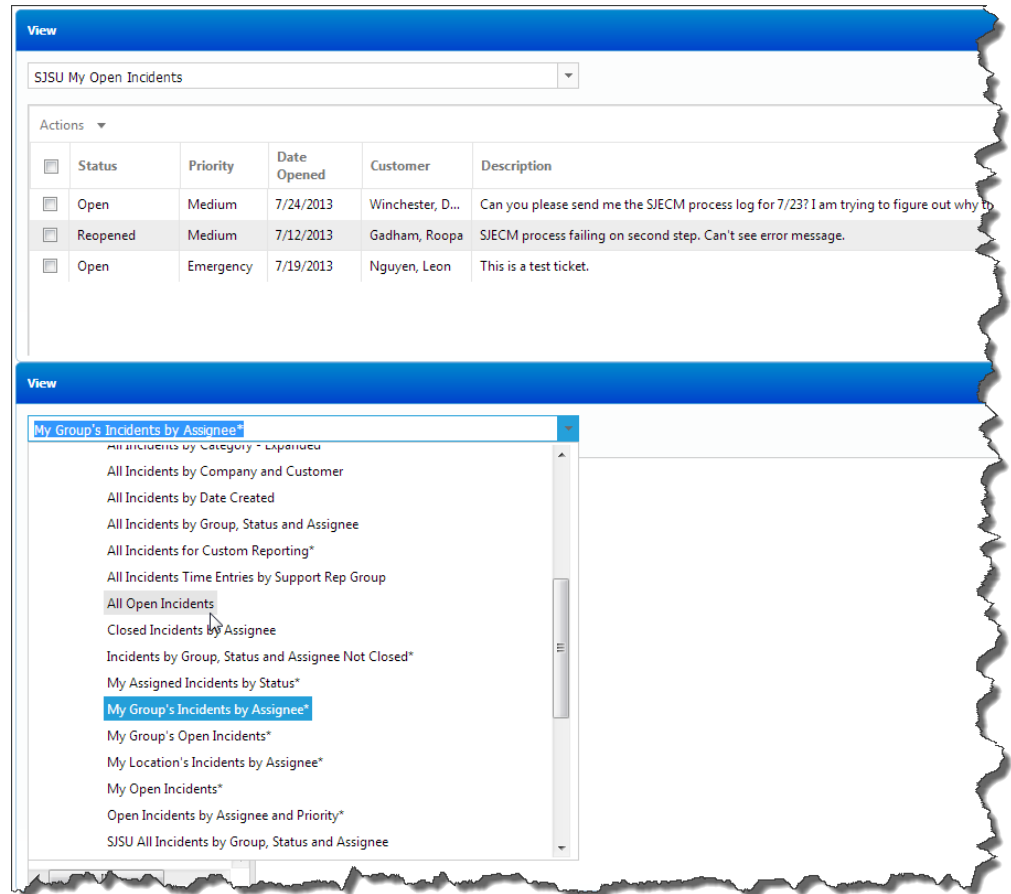
22. Click Save and Close to save the Incident and automatically notify the customer and assignee.



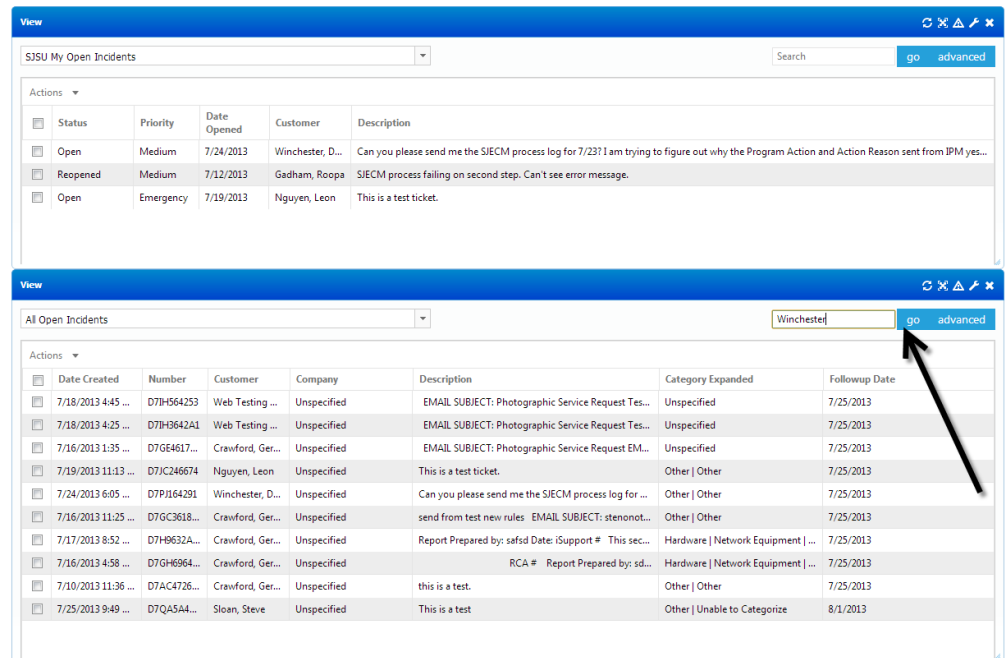
Updating an Incident

It can be worthwhile to update iSupport incidents if new information comes in or if you make progress on resolving the issue. iSupport maintains the history of the work done on the problem, which can be helpful if you need to revisit the issue in the future, or if your incident is later transferred to another assignee.

1. If the incident you wish to update is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this view by clicking the dropdown. **All Open Incidents** will allow you to search every unresolved incident.



3. Type any part of the incident information in the **Search** box if you need to filter the results, such as the incident number, the name of the assignee, the customer, or any word in the description. You can filter search results even more by typing in additional search terms. If you need to reset your search, click **Clear**.
4. Click **Go**.
5. Select the incident to be updated.



6. Update the **Priority**, **Assignee**, or **Category** as necessary. Explain any changes or updates to the incident in the **Description** field.
7. Update the **Description** field with any new information, including progress made on the problem, or new information from the customer.
8. Use the **Custom**, **Others to Notify**, and **Attachment** pagelets to add information as necessary.
9. Click **Save And Close** to save the incident and automatically notify the assignee and customer.

The screenshot displays the iSupport Incident Management interface. At the top, there is a blue header bar with 'Incident' and tabs for 'New' and 'View'. Below this is a toolbar with various icons. An arrow points to the 'Save And Close' icon (a floppy disk with a red 'X').

The main content area is divided into several sections:

- Customer Information:**
 - Name: Dean Winchester
 - Phone: FOB 303 1184, 408-924-1000
 - Email: Dean.Winchester@sjsu.edu
 - Ticket Counts: 1 Open, 0 Suspended, 0 Closed, 0 Reopened
- Incident Details:**
 - Status: Open
 - Priority: Medium
 - Number: D7PJ164291
 - Assignee: Ryan Campbell
 - Created Date: 7/24/2013 6:05:31 PM
 - Author: Ryan Campbell
 - Modified Date: 7/25/2013 12:31:46 PM
 - Category: Unit Specific Information Support Service
 - Rule Group: Admin Apps
 - Followup Date: 7/25/2013
- Description:**

Can you please send me the SJEEM process log for 7/23? I am trying to figure out why the Program Action and Action Reason sent from IPM yesterday did not update PeopleSoft. Is it possible to add me to a list to receive these logs via e-mail automatically?

I verified the information by navigating to Student Admissions > Maintain Applications > Application Maintenance. I expected to see the status APPL APPL, but it was IC. The data was updated in SADW on 7/22.

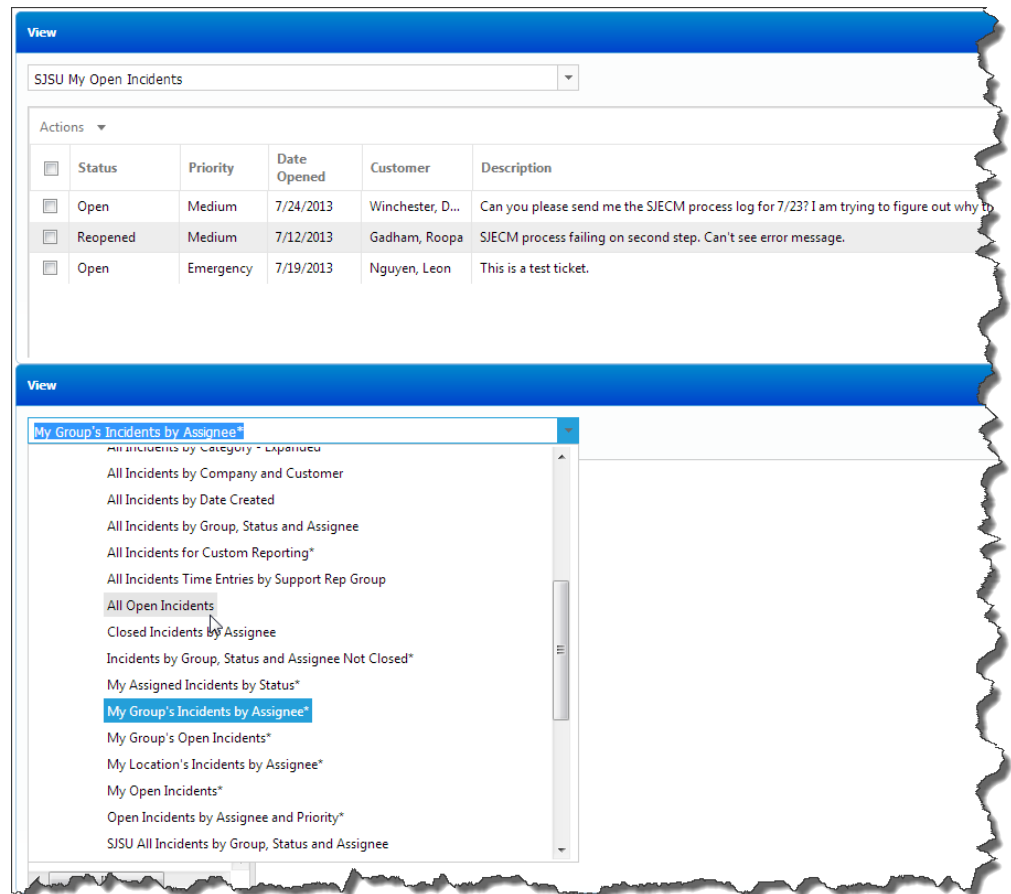
7/25 -- Dean confirmed that data is successfully updating in SADW but not in PS. Updated Category to Admissions.
- Resolution:** (Empty text box)

At the bottom, there is a navigation bar with icons for Details, History, Custom, Others to Notify, Assets, and Attachments.

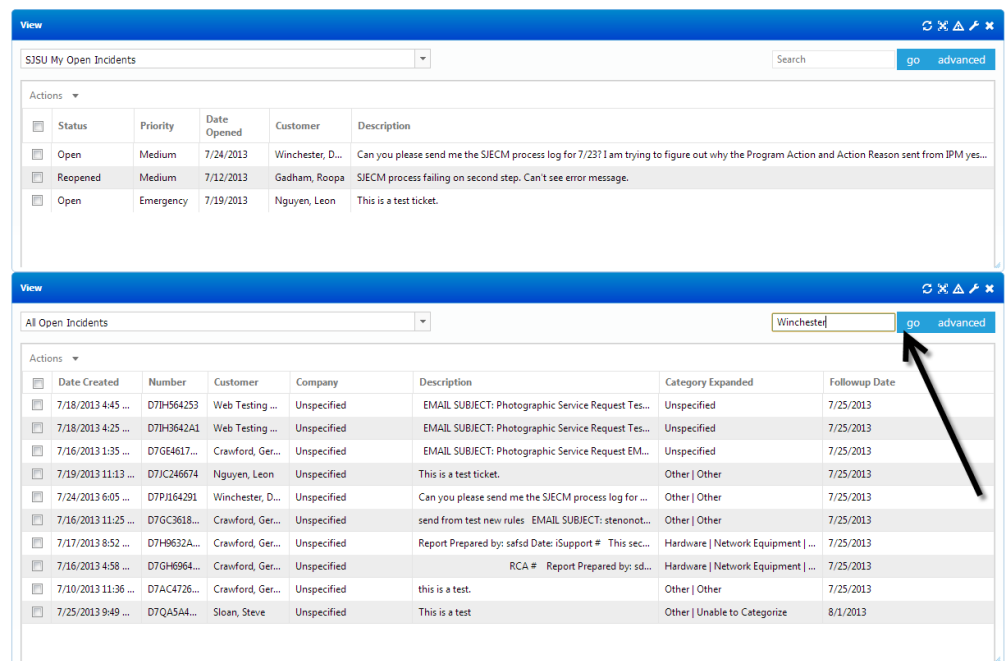
Responding to an Incident

While it's simple to respond to an email or telephone a customer about an issue, iSupport contains a built-in email response system that will allow you to contact all the people related to an incident at the same time and automatically update the incident history with the emailed information.


1. If the incident to which you wish to respond is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this view by clicking the dropdown. **All Open Incidents** will allow you to search every unresolved incident.



3. Type any part of the incident information in the **Search** box if you need to filter the results, such as the incident number, the name of the assignee, the customer, or any word in the description. You can filter search results even more by typing in additional search terms. If you need to reset your search, click **Clear**.
4. Click **Go**.
5. Select the incident to which you wish to respond.



- Click the **Send Email** (envelope) icon.

Customer 

Dean Winchester
FOB 303
1184
408-924-1000
Dean.Winchester@sjsu.edu
000081653

Ticket Counts
1 Open 0 Suspended
0 Closed 0 Reopened

Status: Open Priority: Medium Assignee: Ryan Campbell Category: Unit Specific Information Support Services
Created Date: 7/24/2013 6:05:31 PM Author: Ryan Campbell Rule Group: Admin Apps
Modified Date: 7/25/2013 1:24:14 PM
Closed Date: Followup Date: 7/25/2013

Details History Custom Others to Notify Assets Attachments

Description

Can you please send me the SJEEM process log for 7/23? I am trying to figure out why the Program Action and Action Reason sent from IPM yesterday did not update PeopleSoft. Is it possible to add me to a list to receive these logs via e-mail automatically?

I verified the information by navigating to Student Admissions > Maintain Applications > Application Maintenance. I expected to see the status APPL APPL, but it was IC. The data was updated in SADW on 7/22.

7/25 -- Dean confirmed that data is successfully updating in SADW but not in PS. Updated Category to Admissions.

The Correspondence window displays.

- Under the **Templates** section, select **SJSU Default Correspondence**.
- Click **Apply**.

Correspondence

Send Preview Cancel CC Others To Notify Include Attachments High Priority Normal Priority Low Priority

File Options

From: isupport-service@ptest.sjsu.edu To: Dean.Winchester@sjsu.edu Cc: Bcc: Attach a file

Hide Options

Templates Include Fields

All Templates SJSU Default Correspondence Apply

Subject: Font Name Size Paragraph St... A

The template is applied to the correspondence.

9. Verify the **To:** address and add any other addresses you wish to send to. You can select **CC Others to Notify** to copy everyone on the Others to Notify pagelet.
10. The **Subject** will automatically include the Incident number. This should not be changed if you are emailing from iSupport-Service.
11. Enter your response to the customer in the text field just above the **Correspondence History**. Do not alter the **Correspondence History** or the **Incident Description** Fields. These will automatically populate.
12. Include any additional attachments using the **Attach a File** link. You can select **Include Attachments** if you wish to automatically append the attachments already listed on the incident's **Attachments** pagelet. Attached files appear in the correspondence header.
13. Click **Send** and close the incident window.

*NOTE: Emails are sent from the iSupport-Service email address by default. You can change this by clicking the **From** dropdown and selecting your own email address; however, replies will come to you instead of iSupport, and the incident will not be updated automatically.*

Correspondence

Send

Preview

Cancel

File

CC Others To Notify

Include Attachments

Options

High Priority

Normal Priority

Low Priority

From:

isupport-service@gtest.sjsu.edu

To:

Dean.Winchester@sjsu.edu

Cc:

Bcc:

Attach a file

3ctest.txt x

Show Options

Subject:

[SJSU iSupport] Incident# <Ticket Number>

abc

Print

Link

Unlink

Undo

Redo

B

I

U

Text Color

Background Color

Omega

More

Image

Link

Unlink

Table

Table

Table

Table

Table

Table

Table

Table

Tahoma, aria...

2

Normal

A

Dean,

Can you send us the contents of the ECM tables in SADW so that we can review the data updates, please?

Correspondence History:

<Correspondence History>

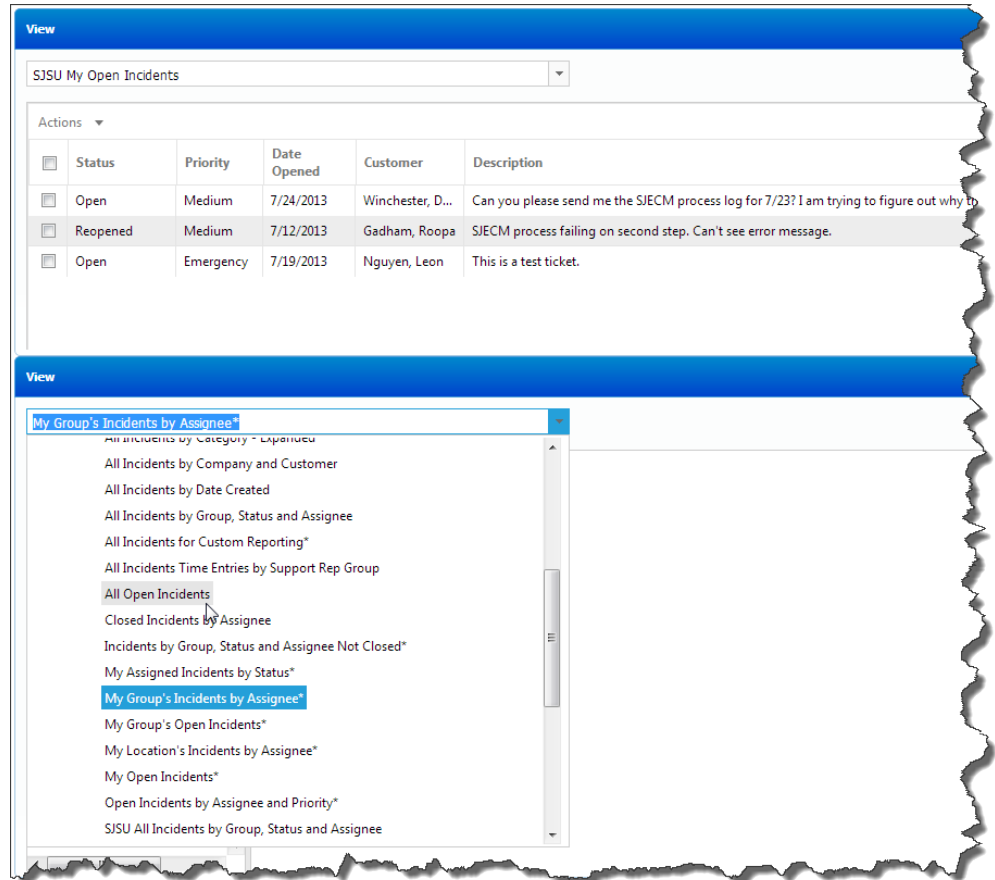
Incident Description:

<Issue Description>

Suspending or Unsuspending an Incident

Suspending an incident can be useful when no further progress can be made on a problem or request for a time, such as pending a patch or upgrade. A suspended incident will no longer send email reminders, nor will it escalate, until it is manually unsuspending again. Use caution when suspending an incident assigned to a queue instead of an individual, as they are more likely to be lost or overlooked. It is recommended to assign an incident to an individual before suspending it.

1. If the incident you wish to suspend or unsuspend is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this view by clicking the dropdown. **All Open Incidents** will allow you to search every unresolved incident.



- Type any part of the incident information in the **Search** box if you need to filter the results, such as the incident number, the name of the assignee, the customer, or any word in the description. You can filter search results even more by typing in additional search terms. If you need to reset your search, click **Clear**.
- Click **Go**.
- Select the incident to be suspended or unsuspended.

The Incident window displays.

- Click the **Status** dropdown list. Choose either the **Suspend** status to suspend the incident, or Open to unsuspend.
- Update the **Description** with the reason for suspending or Unsuspending.
- Click **Save And Close** to save the incident and automatically notify the assignee and customer.

Status	Priority	Date Opened	Customer	Description
Open	Medium	7/24/2013	Winchester, D...	Can you please send me the SIECM process log for 7/23? I am trying to figure out why the Program Action and Action Reason sent from IPM yes...
Reopened	Medium	7/12/2013	Gadham, Roopa	SIECM process failing on second step. Can't see error message.
Open	Emergency	7/19/2013	Nguyen, Leon	This is a test ticket.

Customer **Dean Winchester**
 FOB 303
 1184
 408-924-1000
 Dean.Winchester@sjsu.edu
 000081653
 Ticket Counts
 1 Open 0 Suspended
 0 Closed 0 Reopened

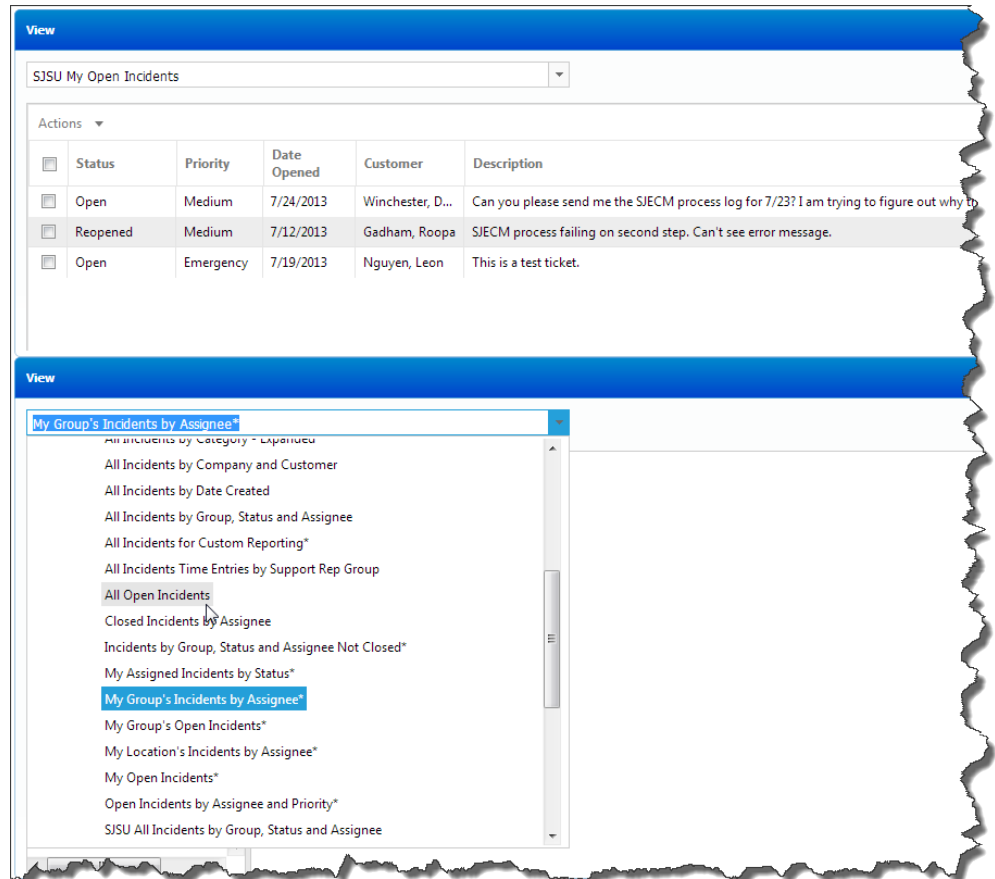
Status Open
Priority Open
Number 000081653
Assignee Ryan Campbell
Created Date 7/24/2013 6:05:31 PM
Author Ryan Campbell
Modified Date 7/25/2013 1:57:37 PM
Closed Date
Followup Date 7/26/2013

Description
 Can you please send me the SIECM process log for 7/23? I am trying to figure out why the Program Action and Action Reason sent from IPM yesterday did not update PeopleSoft. Is it possible to add me to a list to receive these logs via e-mail automatically?
 I verified the information by navigating to Student Admissions > Maintain Applications > Application Maintenance. I expected to see the status APPL APPL, but it was IC. The data was updated in SADW on 7/22.
 7/25 -- Dean confirmed that data is successfully updating in SADW but not in PS. Updated Category to Admissions.

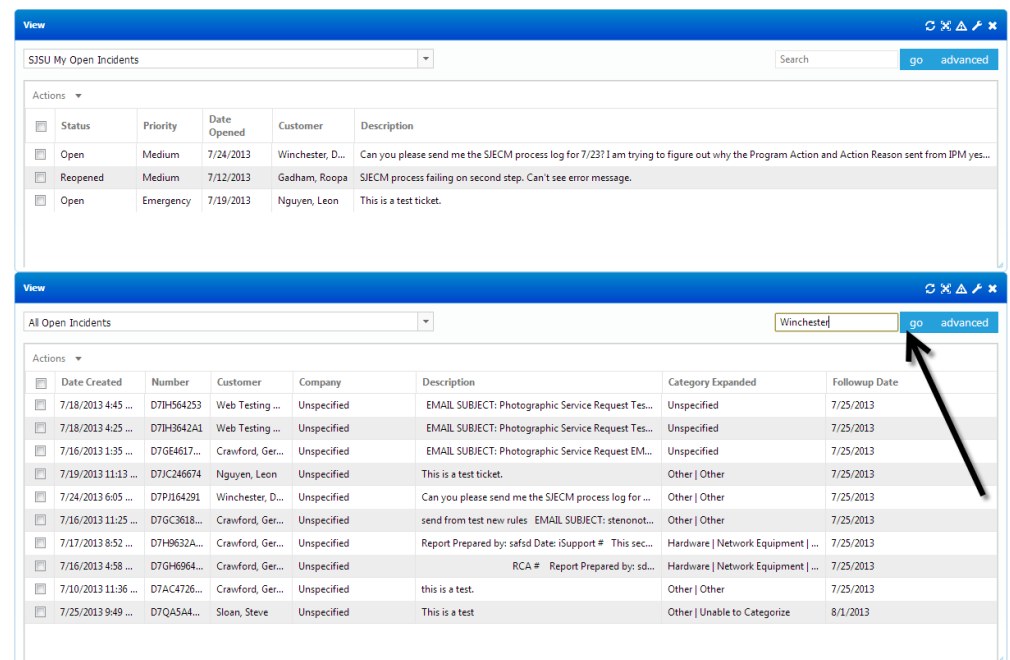
Closing an Incident

Once a problem or request has been resolved, closing the incident will remove it from your open incidents list and prevent it from sending further notifications. A meaningful resolution will help others who may need to research the issue at a future date.

1. If the incident you wish to close is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this view by clicking the dropdown. **All Open Incidents** will allow you to search every unresolved incident.



3. Type any part of the incident information in the **Search** box if you need to filter the results, such as the incident number, name of the assignee, the customer, or any word in the description. You can filter search results even more by typing in additional search terms. If you need to reset your search, click **Clear**.
4. Click **Go**.
5. Select the incident to be closed.



6. Explain how you solved the problem or answered the request in the **Resolution** field. If you do not enter a resolution, you will be prompted for one when you attempt to save the closed incident.
7. Click the **Status** dropdown and select Closed.
8. Click **Save And Close** to close the incident and automatically notify the assignee and customer.

Incident New View

Save Save And Close Print Font Size Add History Add Asset Categorize Route Customer Templates Hierarchy Ad Hoc Approval Pin

File Display Actions

Customer **Dean Winchester**
 FOB 303
 1184
 408-924-1000
 Dean.Winchester@sjsu.edu
 000081653

Ticket Counts
 1 Open 0 Suspended
 0 Closed 0 Reopened

Status: Open
 Priority: Open
 Number: On Hold

Assignee: Ryan Campbell
 Created Date: 7/24/2013 6:05:31 PM
 Author: Ryan Campbell
 Modified Date: 7/25/2013 1:57:37 PM
 Closed Date:
 Followup Date: 7/26/2013

Category: Unit Specific
 Information Support Services
 PSCS-Admissions
 Rule Group: Admin Apps

Description

Can you please send me the SJECH process log for 7/23? I am trying to figure out why the Program Action and Action Reason sent from IPM yesterday did not update PeopleSoft. Is it possible to add me to a list to receive these logs via e-mail automatically?

I verified the information by navigating to Student Admissions > Maintain Applications > Application Maintenance. I expected to see the status APPL APPL, but it was IC. The data was updated in SADW on 7/22.

7/25 -- Dean confirmed that data is successfully updating in SADW but not in PS. Updated Category to Admissions.

Resolution

Confirmed that data was being updated in SADW after the SJECH job was completed. Dean needed to wait another day to see his data updates reflected in PeopleSoft.

Reopening an Incident

Occasionally a ticket will need to be reopened—maybe the proposed solution didn't actually solve the problem, or maybe the problem was just a symptom of a larger issue. But for whatever reason, sometimes it is necessary to open the incident again.

1. Click the Views dropdown to select a view to search for the incident **Closed Incidents by Assignee** is a useful view. Select the View you want to use.

NOTE: You can also use the default view in the bottom window, SJSU My Group's Incidents by Assignee, but this will not restrict the search to closed incidents.

2. Type any part of the incident information in the **Search** box if you need to filter the results, such as the incident number, name of the assignee, the customer, or any word in the description. You can filter search results even more by typing in additional search terms. If you need to reset your search, click **Clear**.
3. Click **Go**.
4. Select the incident to be reopened. You may need to navigate the folders on the left side first.

The screenshot displays two windows from the SJSU Incident Management system. The top window, titled 'My Open Incidents', shows a dropdown menu with various views. The 'Closed Incidents by Assignee' view is selected. The bottom window, titled 'My Group's Incidents by Assignee', shows a list of incidents. The 'Search' box is empty, and the 'Go' button is highlighted. The 'Export' list on the left shows several assignees, including 'Campbell, Ryan (23)'. The main table displays incident details, including 'Date Closed', 'Closed By', 'Resolution', 'Date Created', 'Priority', 'Number', and 'Customer'. A tooltip is visible over the 'Resolution' column, stating: 'Confirmed that data was being updated in SADW after the SIECM job was completed. Dean needed to wait another day to see his data updates reflected in PeopleSoft.'

Date Closed	Closed By	Resolution	Date Created	Priority	Number	Customer
7/25/2013 2:21 ...	Campbell, Ryan	Confirmed that data was being updated in SADW af...	7/24/2013 6:05 ...	Medium	D7PJI64291	Winchester

5. Click the **Reopen** icon.

The screenshot shows the Incident Management interface for a customer named Dean Winchester. The 'Status' is 'Closed'. The 'Reopen' button is highlighted with a black arrow. The interface includes a top navigation bar with 'Incident', 'New', and 'View' tabs. Below the navigation bar are icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Add History', 'Reopen', and 'Pin'. The main content area displays customer information, ticket counts (0 Open, 0 Suspended, 1 Closed, 0 Reopened), and a list of incidents. The 'Description' field contains text about the SJECEM process log and the status of the incident.

The window will reload with the Status changed to Reopened.

6. Explain why you're reopening the incident in the **Description** field. If necessary, update the **Assignee**, **Priority**, and **Category**.

7. Click **Save And Close** to close the incident and automatically notify the assignee and customer.

The screenshot shows the Incident Management interface after the incident has been reopened. The 'Status' is now 'Reopened'. The 'Description' field contains text about the SJECEM process log and the status of the incident. The 'Resolution' field contains text about the data being updated in SADW after the SJECEM job was completed. The interface includes a top navigation bar with 'Incident', 'New', and 'View' tabs. Below the navigation bar are icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Add History', 'Add Asset', 'Categorize', 'Route', 'Customer', 'Templates', 'Hierarchy', 'Ad Hoc Approval', and 'Pin'. The main content area displays customer information, ticket counts (0 Open, 0 Suspended, 0 Closed, 1 Reopened), and a list of incidents. The 'Description' field contains text about the SJECEM process log and the status of the incident.

iSupport Dashboard Tips and Tricks

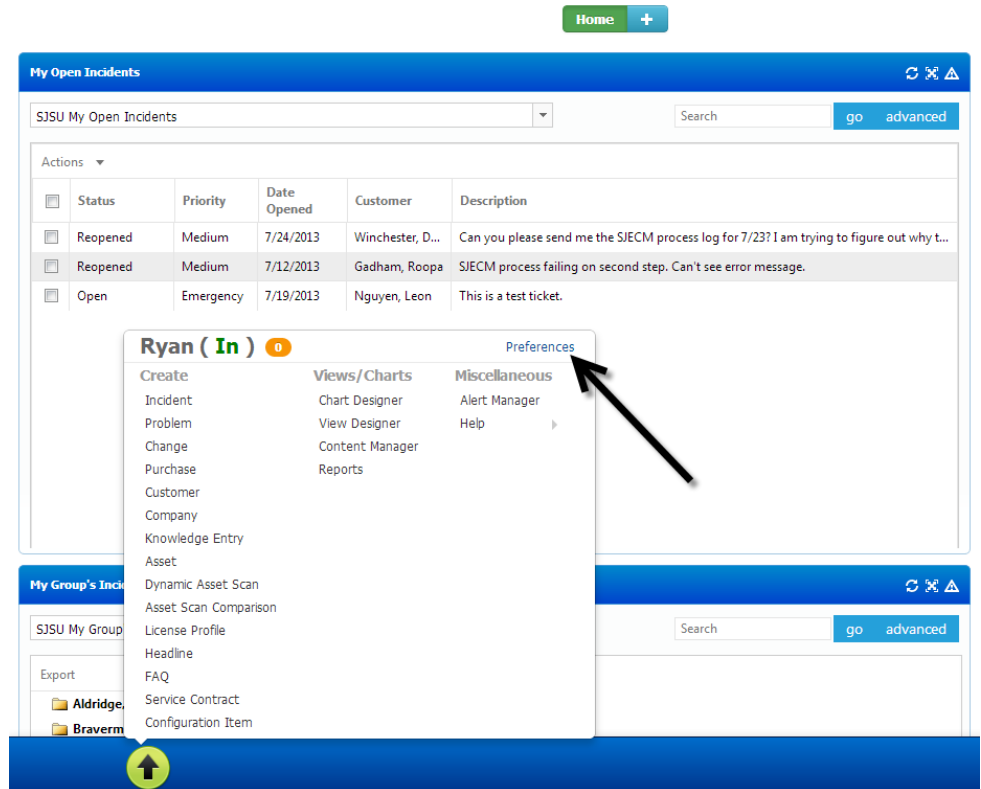
By default, iSupport starts out with the default Home dashboard, which is standardized for all users across the campus. However, iSupport is flexible and highly customizable. This section will describe the customization options available to you so that you can best suit the software to your own needs.

Quick Access

Quick Access is the toolbar at the bottom of your iSupport dashboard. By default, it has only one icon: the green More arrow. But you can add other icons to your dashboard, making it easier to get to the features you use often.

In this example, we will add a Create Incident icon to the Quick Access bar.

1. Click the **More** (green arrow) icon.
2. Click **Preferences** at the top right of the menu.



The Preferences page displays.

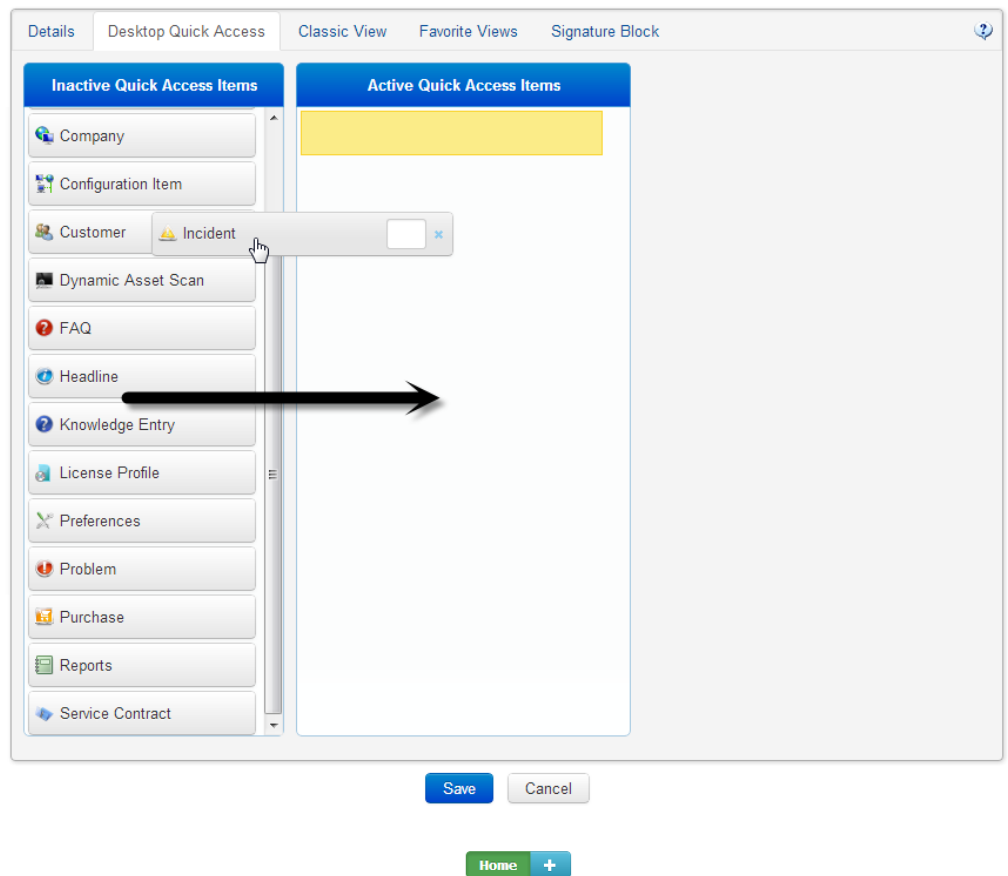
NOTE: Although you see a password reset field here, your password is managed by SJSUAD. Attempting to change your password on this page will not work.

3. Click **Desktop Quick Access**.

A screenshot of the 'Desktop Quick Access' preferences page. It has tabs for 'Details', 'Desktop Quick Access', 'Classic View', 'Favorite Views', and 'Signature Block'. The 'Desktop Quick Access' tab is active. It contains a 'Display Time Zone' dropdown set to '(UTC-08:00) Pacific Time (US & Canada)'. Below it is a section 'To reset your password, enter values below.' with three input fields: 'Current Password', 'New Password', and 'Confirm Password'. There is also a 'Text Editor Toolbar' dropdown set to 'Popup' and a checkbox for 'Tab key inserts tabbed spaces in text editor fields'. At the bottom, there are 'Save' and 'Cancel' buttons.

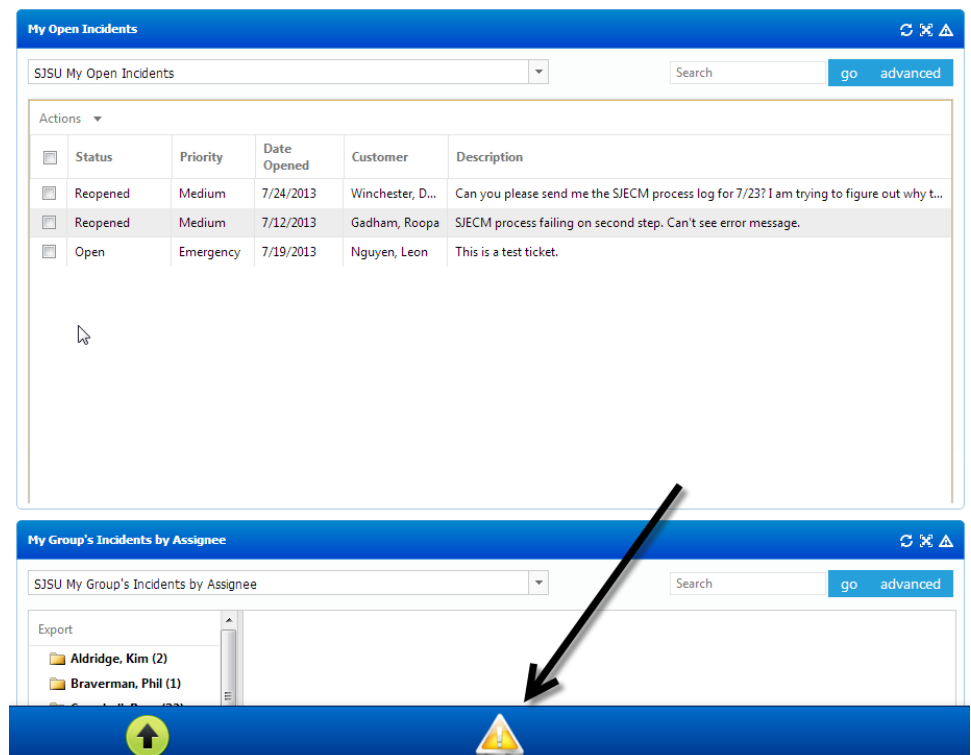
The Desktop Quick Access tab displays.

4. Select the **Incident** icon and drag it from the **Inactive Quick Access Items** column to the **Active** one.
5. Click Save.



The Create New Incident icon is now easily accessible from your quick access bar.

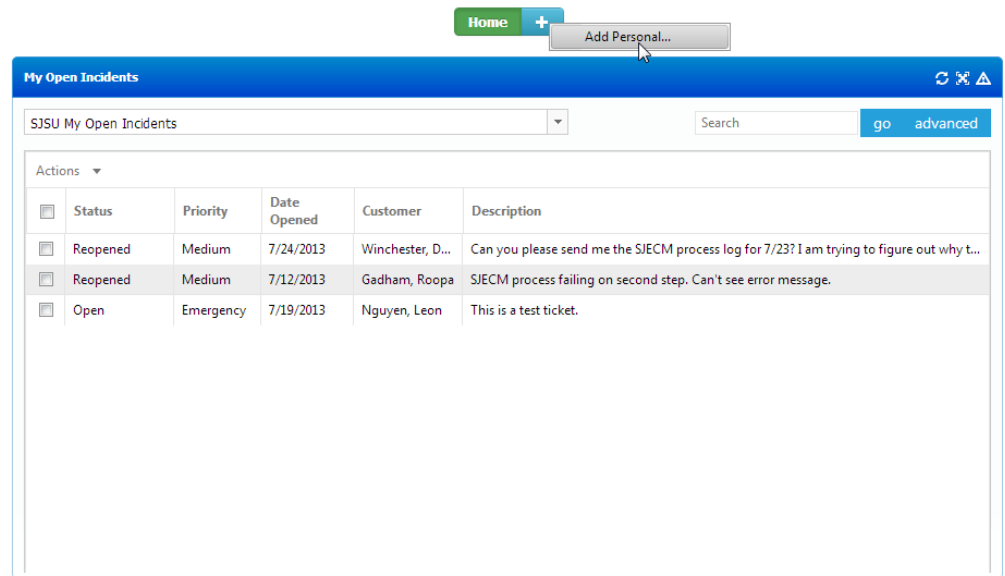
You can repeat this for any other iSupport function you use regularly, such as Customer, Headline, or Knowledge Entry.



Creating a Personalized Dashboard

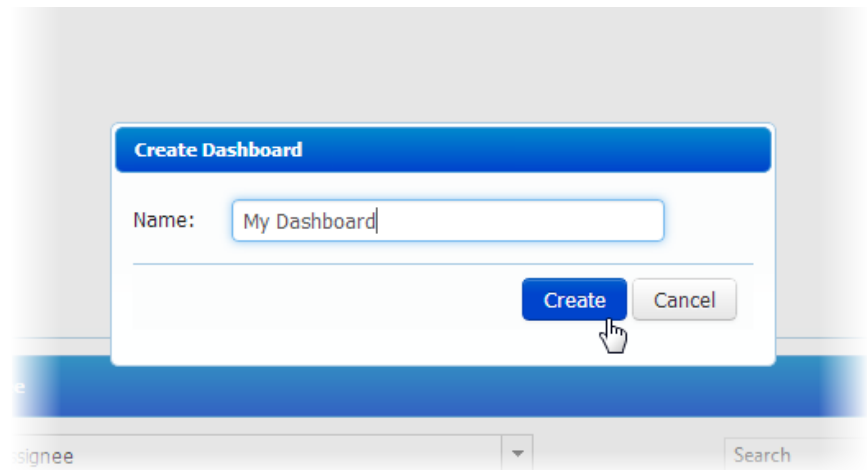
The Home dashboard that you use by default may contain the most useful features, but perhaps the windows don't fit your screen, or perhaps there are other views that you use more regularly. You can create your own dashboard so that the software is best configured to your own preferred workstyle. In addition, you can add a Pin Board to track your most important issues.

1. Click the **Create Dashboard** (plus) icon.
2. Click **Add Personal...**



The Create Dashboard dialog box displays.

3. Type a name for your dashboard and click Create.



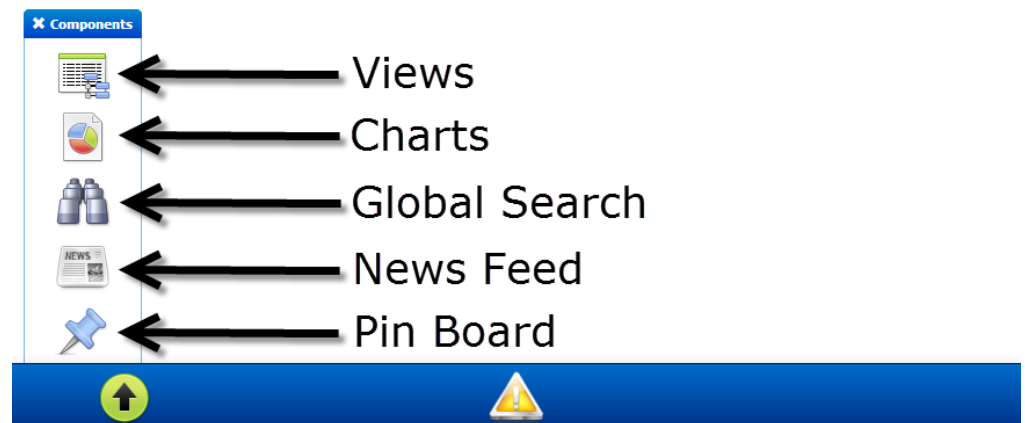
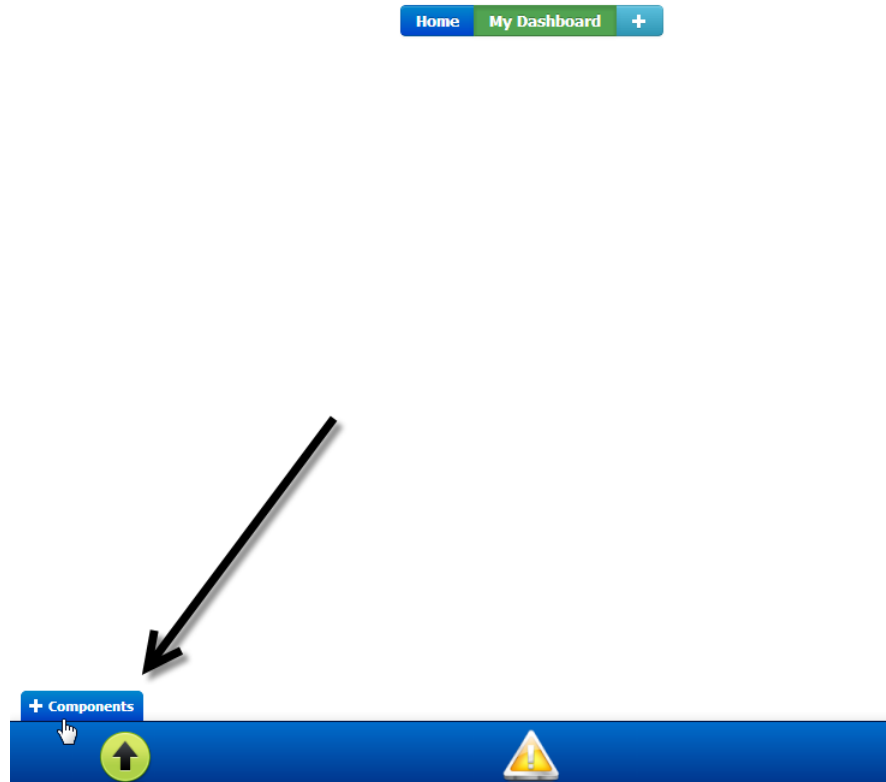
Your new Dashboard displays.

This is a blank slate, ready for you to add components. You'll notice a new tab in the lower left, labeled **+Components**.

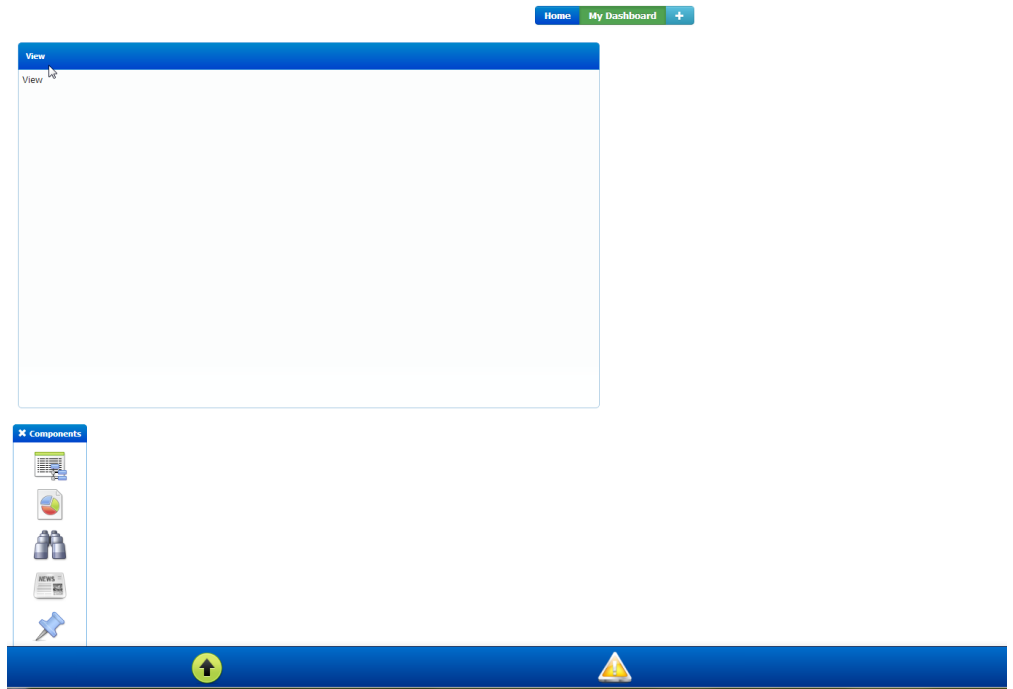
4. Click the **+Components** tab to see a list of component types you can add to the page.

The Components Menu displays, including the following icons:

- **Views:** Searches that can help you find the data you need. Your Home dashboard contains two views: **SJSU My Open Incidents** and **SJSU My Group's Incidents By Assignee**
- **Charts:** Visual displays of your data—for example, a bar chart of all your incidents by priority
- **Global Search:** Allows you to search all incidents, but will slow down your Dashboard refresh rate
- **News Feed:** An updating list of headlines posted by iSupport users
- **Pin Board:** A dynamic box to which you can attach incidents you want to track

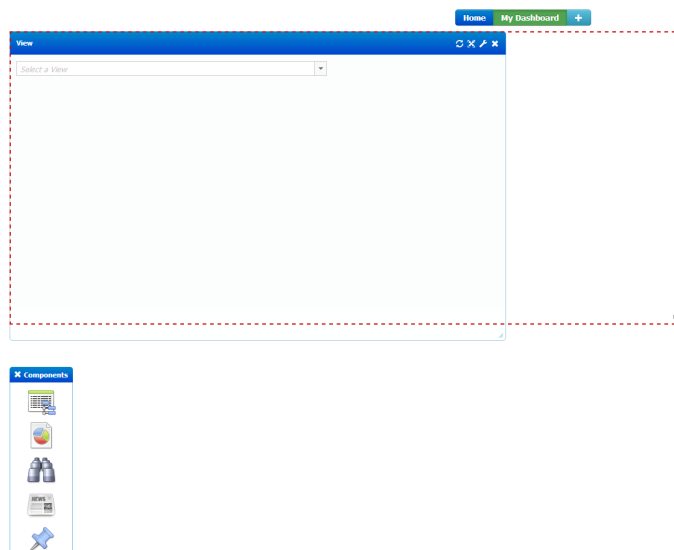


- Click the **Views** icon and drag the view onto your dashboard, wherever you like.



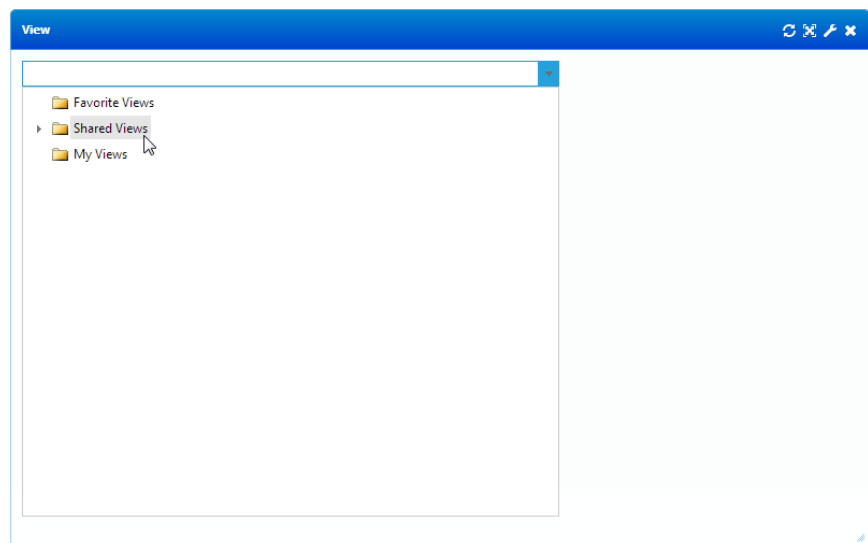
The View is now part of the dashboard. However, it doesn't fit the dashboard well yet.

- Drag the edges of the window until you are satisfied with its dimensions.



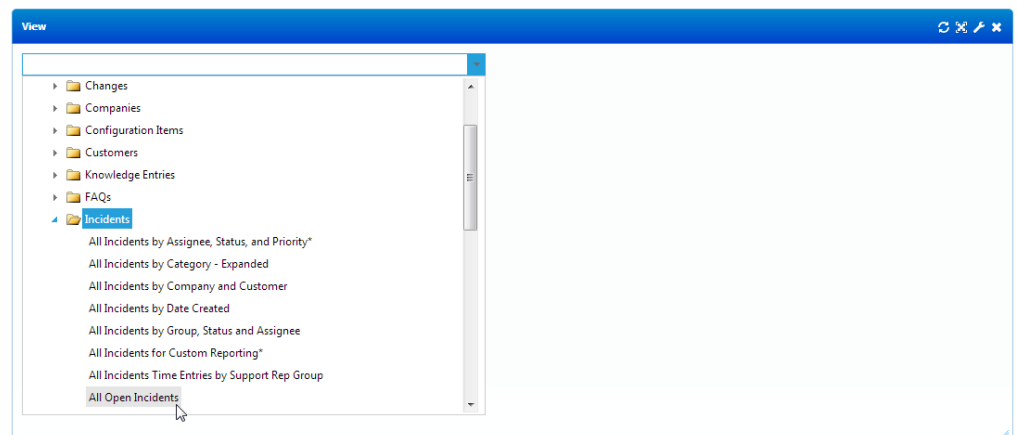
Now the View is placed and sized the way I prefer. But it still contains no data.

7. Click the **Select a View** dropdown
8. Click **Shared Views**.



The Shared Views menu expands.

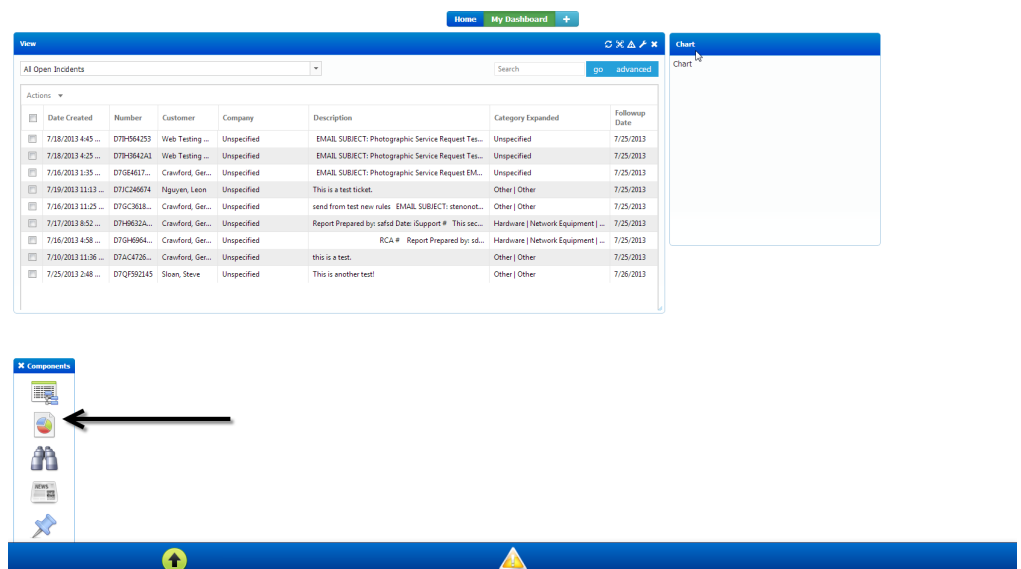
9. Select **Incidents**
10. Select **All Open Incidents**



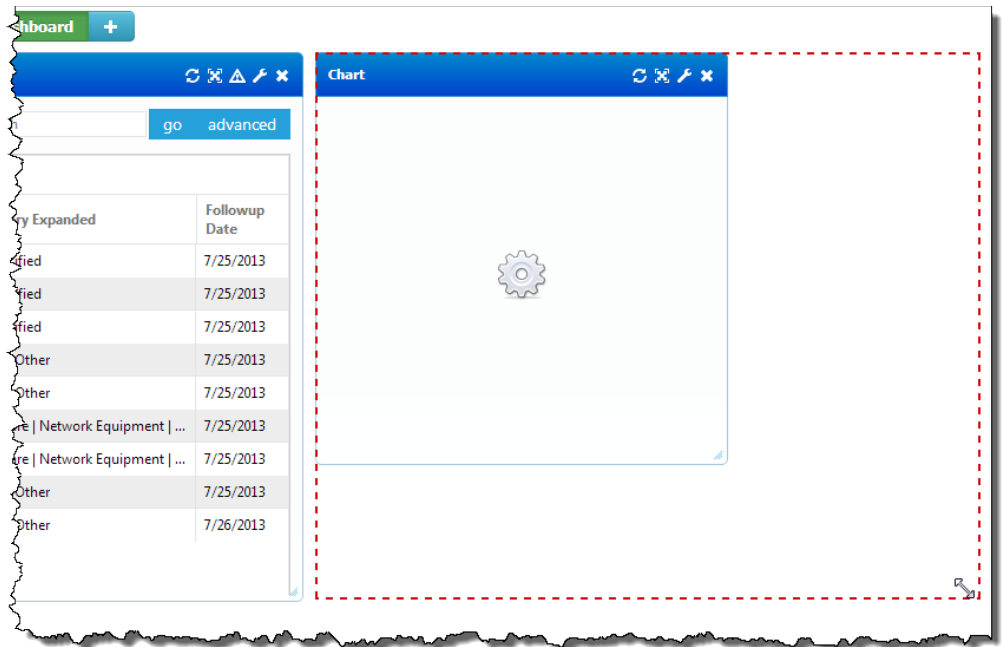
The Dashboard updates with your new View.

Now let's add a chart to the dashboard.

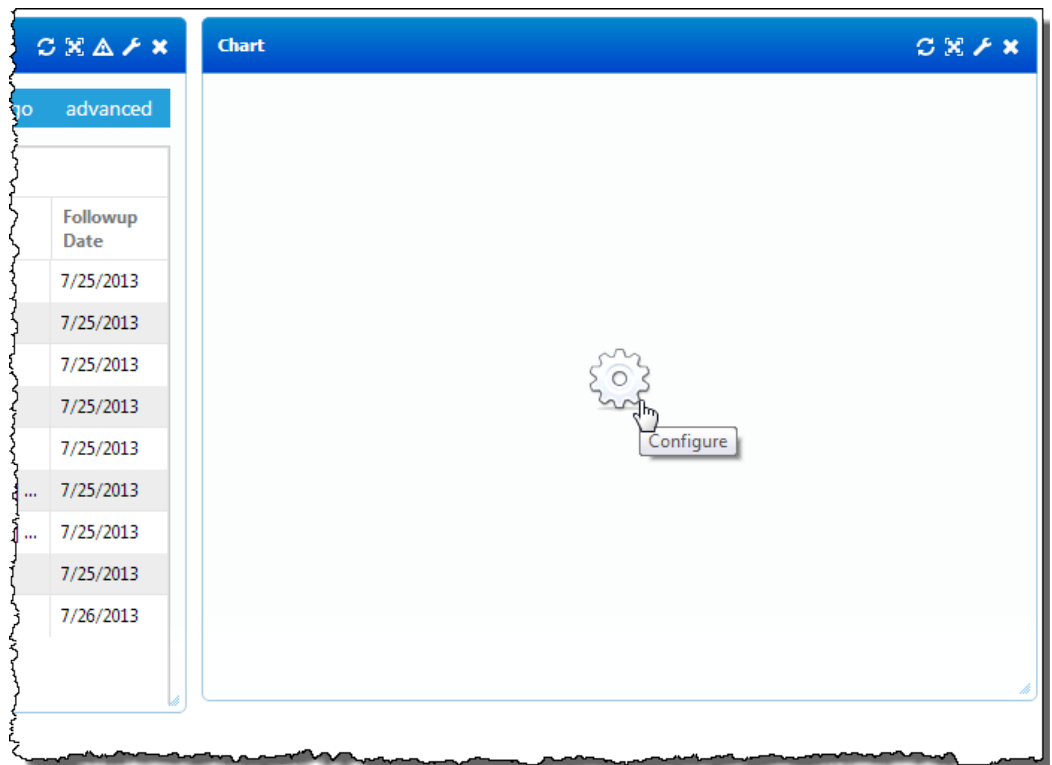
11. Click the **Charts** icon and drag the chart into place on your dashboard.



12. Drag the edges of the **Chart** window until it is sized to your preference.

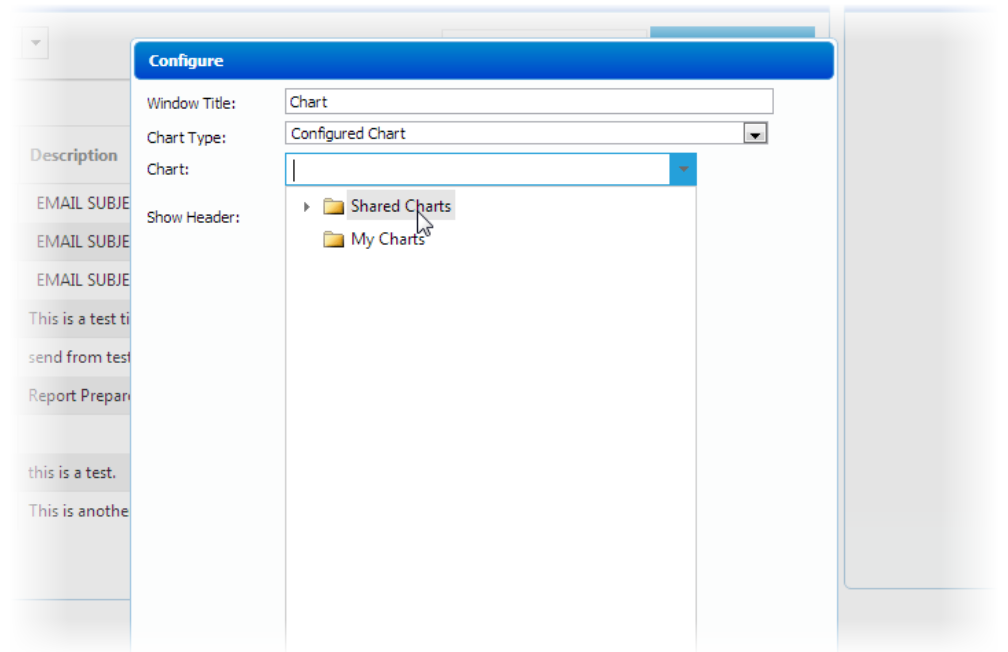


13. Click the **Configure** (gear) icon to choose the chart you want.



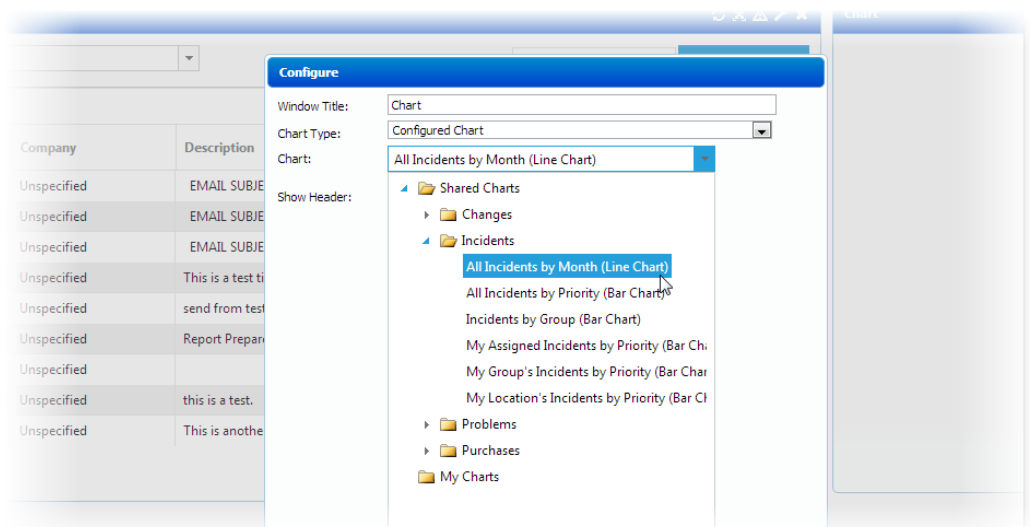
The Configure dialog box displays.

14. Click the **Chart** dropdown list.
15. Click **Shared Charts**.

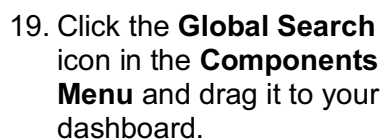


The Shared Charts menu expands.

16. Select **Incidents**.
17. Select **All Incidents by Month (Line Chart)**.
18. Click **Save**.



Next let's add the **Global Search** to the dashboard.



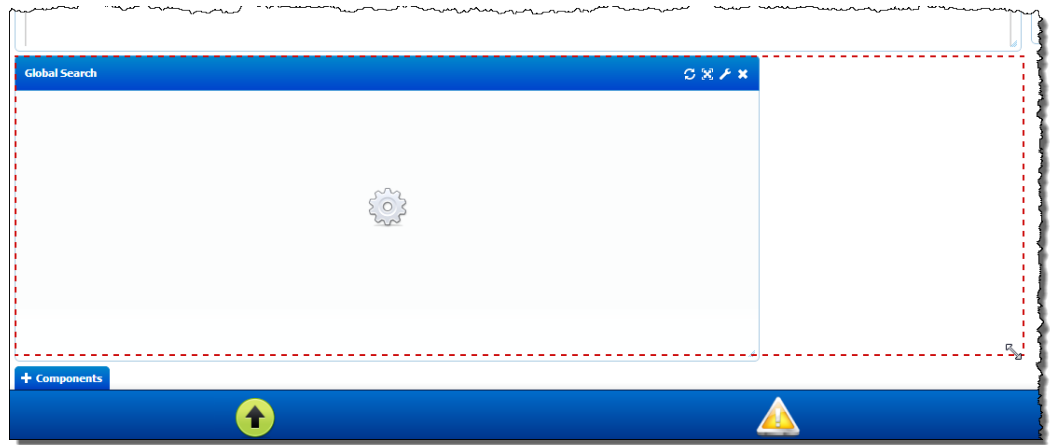
Global Search

Global Search

20. Drag the edges of the window until it is sized to your preference.

NOTE: In the displayed example, I have closed the Components menu for better visibility.

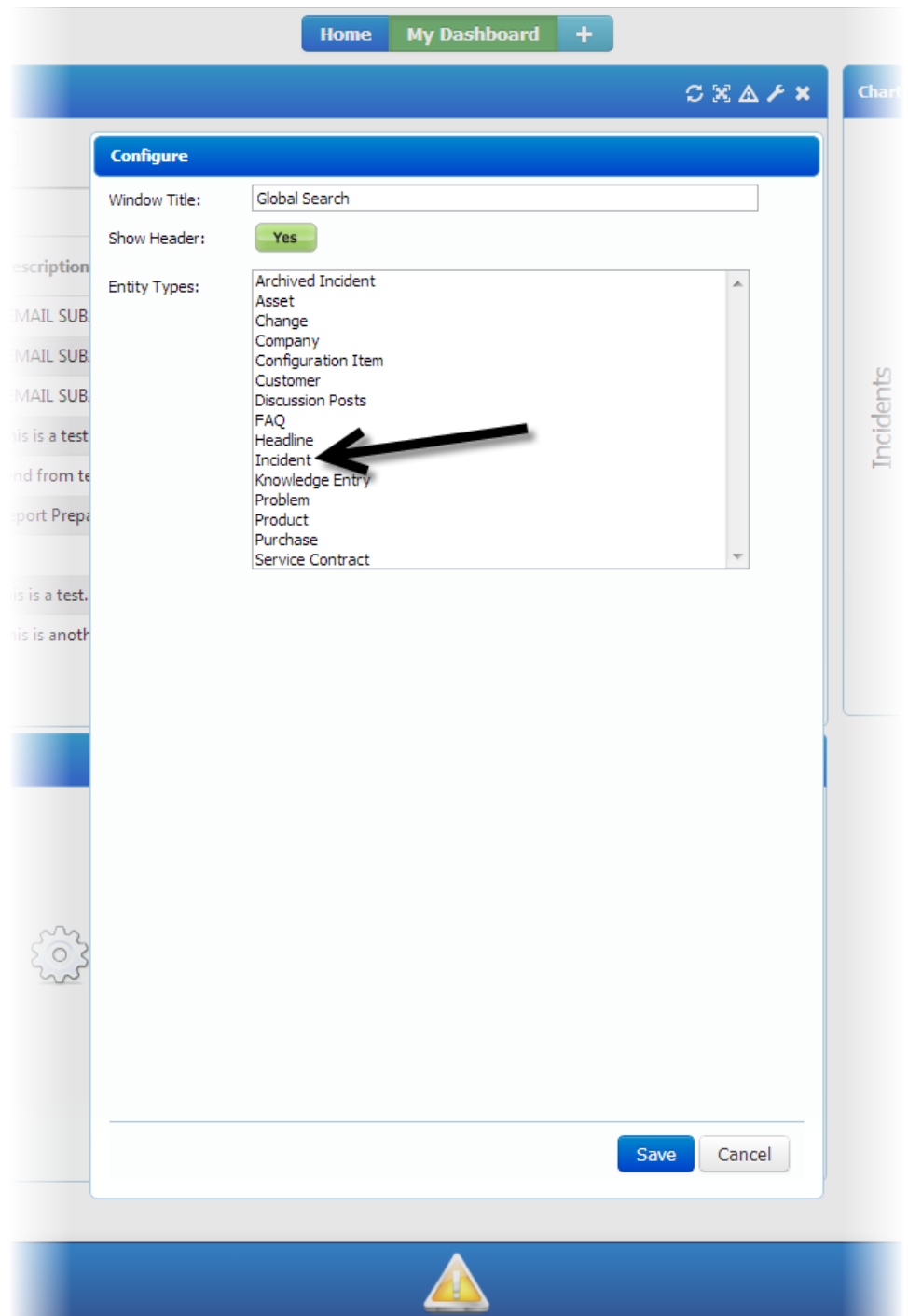
21. Click the **Configure** (gear) icon to select your Global Search.



The Configure menu displays.

22. Select **Incident**.

23. Click **Save**.



Your dashboard updates with the new Global Search.

NOTE: Global Search slows down the refresh rate of your dashboard, meaning it may take several seconds for your data to appear.

The screenshot shows the iSupport dashboard. At the top, there are navigation links: 'Home' and 'My Dashboard'. Below this is a 'View' section with a dropdown menu set to 'All Open Incidents'. A search bar is present with 'go' and 'advanced' buttons. Below the search bar is a table of incidents with columns: Date Created, Number, Customer, Company, Description, Category Expanded, and Followup Date. The table contains several rows of incident data. Below the table is a 'Global Search' section with a search bar and 'go' and 'clear' buttons. Below the search bar is a list of incidents, including 'B14A59367A' and 'B14H246936'.

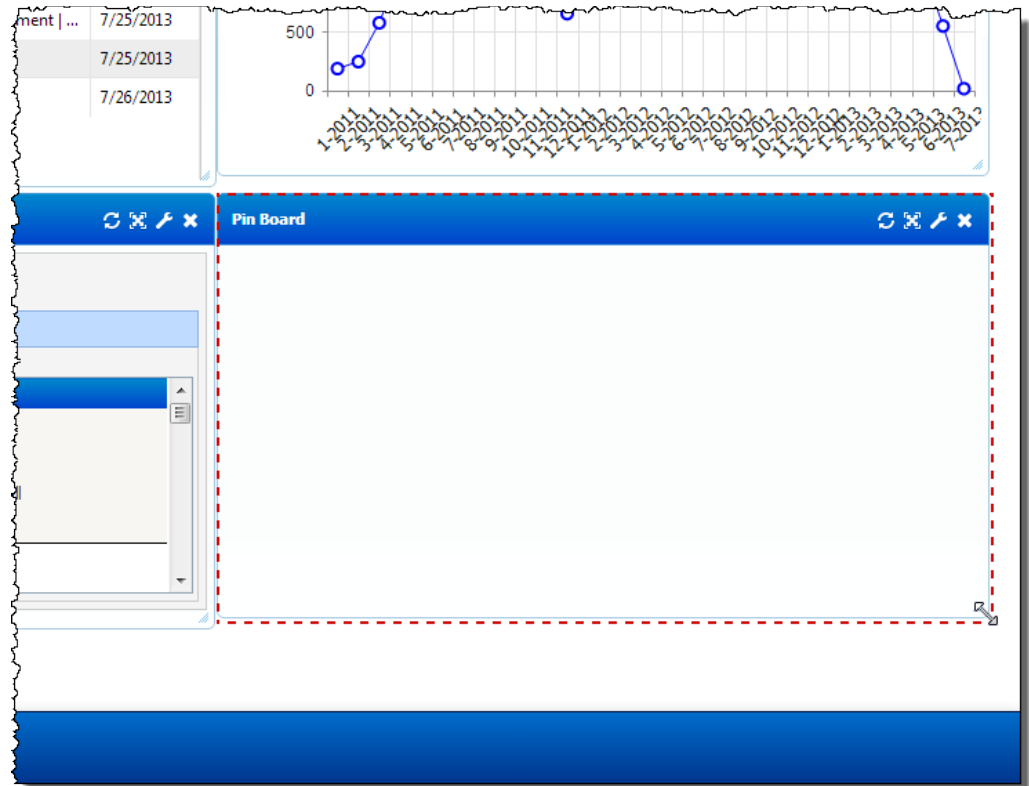
Date Created	Number	Customer	Company	Description	Category Expanded	Followup Date
7/18/2013 4:45 ...	D7IH564253	Web Testing ...	Unspecified	EMAIL SUBJECT: Photographic Service Request Tes...	Unspecified	7/25/2013
7/18/2013 4:25 ...	D7IH3642A1	Web Testing ...	Unspecified	EMAIL SUBJECT: Photographic Service Request Tes...	Unspecified	7/25/2013
7/16/2013 1:35 ...	D7GE4617...	Crawford, Ger...	Unspecified	EMAIL SUBJECT: Photographic Service Request EM...	Unspecified	7/25/2013
7/19/2013 11:13 ...	D7JC246674	Nguyen, Leon	Unspecified	This is a test ticket.	Other Other	7/25/2013
7/16/2013 11:25 ...	D7GC3618...	Crawford, Ger...	Unspecified	send from test new rules EMAIL SUBJECT: stenonot...	Other Other	7/25/2013
7/17/2013 8:52 ...	D7H9632A...	Crawford, Ger...	Unspecified	Report Prepared by: safsd Date: iSupport # This sec...	Hardware Network Equipment ...	7/25/2013
7/16/2013 4:58 ...	D7GH6964...	Crawford, Ger...	Unspecified	RCA # Report Prepared by: sd...	Hardware Network Equipment ...	7/25/2013
7/10/2013 11:36 ...	D7AC4726...	Crawford, Ger...	Unspecified	this is a test.	Other Other	7/25/2013
7/25/2013 2:48 ...	D7QF592145	Sloan, Steve	Unspecified	This is another test!	Other Other	7/26/2013

24. If you have closed your **Components Menu**, reopen it.

25. Click the **Pin Board** icon and drag to your desktop.

The screenshot shows the iSupport dashboard with the 'Global Search' section at the top. Below it is the 'Components' menu, which is currently closed. To the right of the 'Components' menu is the 'Pin Board' icon, which is a blue pin. A black arrow points to the 'Pin Board' icon. Below the 'Pin Board' icon is a line graph showing 'Incidents' over time. The graph has a y-axis labeled 'Incidents' ranging from 0 to 2000 and an x-axis showing dates from 7/18/2013 to 7/26/2013. The graph shows a fluctuating line with several peaks and valleys.

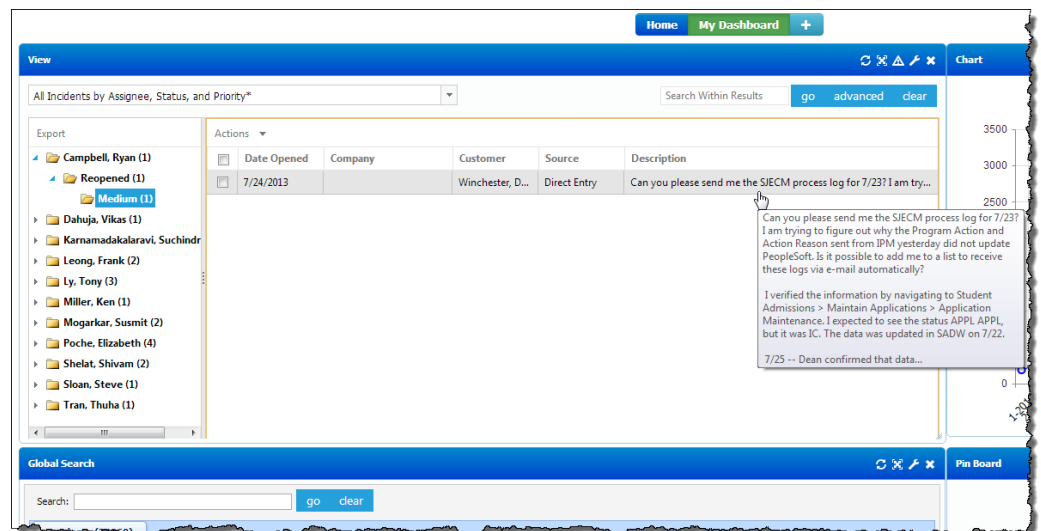
26. Drag the edges of the window until it is sized to your preference.



The Dashboard now shows your Pin Board.

By default, the Pin Board contains no data. Incidents can be manually attached to your Pin Board.

27. Select an incident you want to track.



The Incident window displays.

28. Click Pin to attach the incident to your Pin Board.

The screenshot shows the 'Incident' window in a software application. The top menu bar includes 'Incident', 'New', and 'View'. Below the menu is a toolbar with icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Add History', 'Add Asset', 'Categorize', 'Route', 'Customer', 'Templates', 'Hierarchy', 'Ad Hoc Approval', and 'Pin'. The main area displays incident details for a customer named Dean Winchester. The status is 'Reopened', priority is 'Medium', and the assignee is 'Ryan Campbell'. The incident number is 'D7PJ164291'. The 'Created Date' is '7/24/2013 6:05:31 PM', 'Modified Date' is '7/25/2013 3:31:25 PM', and 'Closed Date' is '7/25/2013 2:21:18 PM'. The 'Followup Date' is set to '7/26/2013'. The 'Category' is 'Unit Specific Information Support Services' and the 'Rule Group' is 'PSCS-Admissions Admin Apps'. On the left, there is a 'Customer' section with a profile picture and contact information, and a 'Ticket Counts' section showing '0 Open', '0 Suspended', '0 Closed', and '1 Reopened'. At the bottom, there is a 'Details' tab and a text area with a comment: 'Can you please send me the SJEEM process log for 7/23? I am trying to figure out why the Program Action and Action Reason sent from IPM yesterday did not update PeopleSoft. Is it possible to add me to a list to receive these logs via e-mail automatically?'. A 'Pin' button is visible in the top right corner of the window.

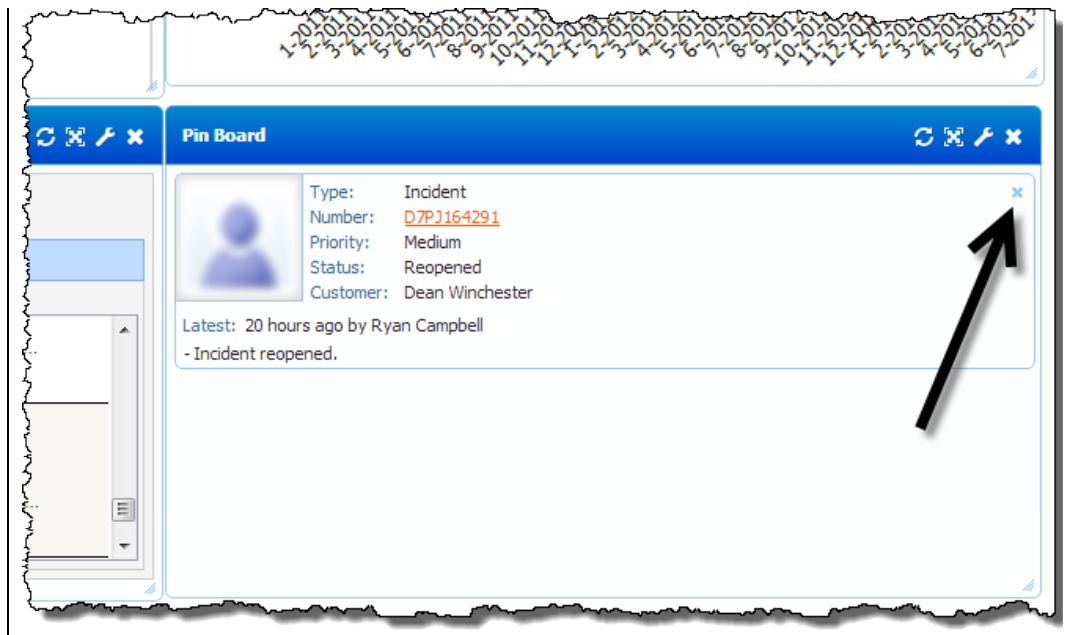
The Add To Pin Board dialog box displays.

29. Select your Pin Board.
30. Click **Pin**.
31. Close the **Incident** window.

The screenshot shows the 'Add To Pin Board' dialog box. It has a title bar 'Add To Pin Board'. Inside, there is a section 'Select pin boards to pin this incident to:' with a list box containing 'My Dashboard - Pin Board'. Below this is a 'Comment:' text area. At the bottom, there are two buttons: 'Pin' and 'Close'. A mouse cursor is pointing at the 'Pin' button. The background shows a blurred view of the incident details from the previous screenshot.

The pinned incident appears in your Pin Board.

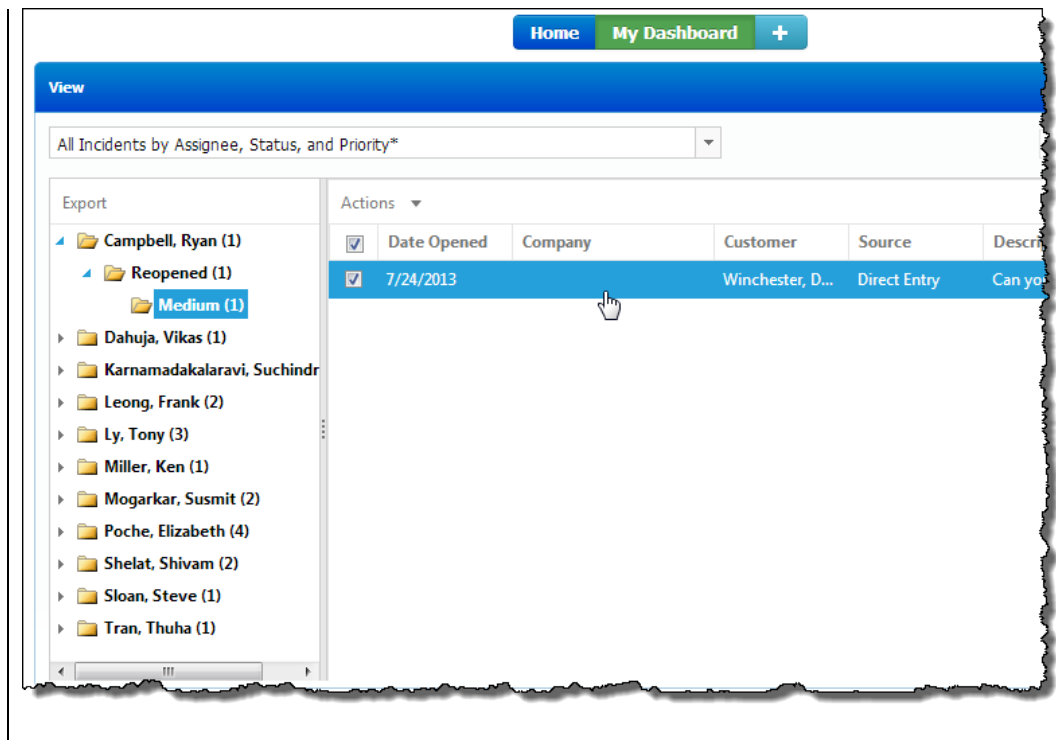
You can click the **X** at any time to remove an incident from your Pin Board.



Adding a Quick Access icon to a Page

Within individual pages in iSupport, you can add Quick Access icons to features that you use frequently. In the example below, we will add a Create New Customer icon to the Incident page.

1. Open any incident in iSupport.



The Incident window displays.

2. Click the **Open Quick Access Dialog** icon.

The screenshot shows the 'Incident' window in a software application. At the top, there are tabs for 'Incident', 'New', and 'View'. Below these is a toolbar with icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'History', 'Add Asset', 'Categorize', 'Route', 'Customer', and 'Templates'. A tooltip 'Open Quick Access Dialog' is visible over the 'Open Quick Access Dialog' icon. The main area is divided into two sections. The left section, titled 'Customer', shows details for 'Dean Winchester' (FOB 303, 1184, 408-924-1000, Dean.Winchester@sjsu.edu, 000081653). It also displays 'Ticket Counts': 0 Open, 0 Suspended, 0 Closed, and 1 Reopened. The right section shows incident details: Status (Reopened), Priority (Medium), Number (D7PJ164291), Assignee (Ryan Campbell), Created Date (7/24/2013 6:05), Modified Date (7/25/2013 3:31), Closed Date (7/25/2013 2:21), and Followup Date (7/26/2013). Below this is a 'Description' section with a text area containing the message: 'Can you please send me the SJECM process log for 7/23? I am trying to figure out why the Program Action are not update PeopleSoft. Is it possible to add me to a list to receive these logs via e-mail automatically?'

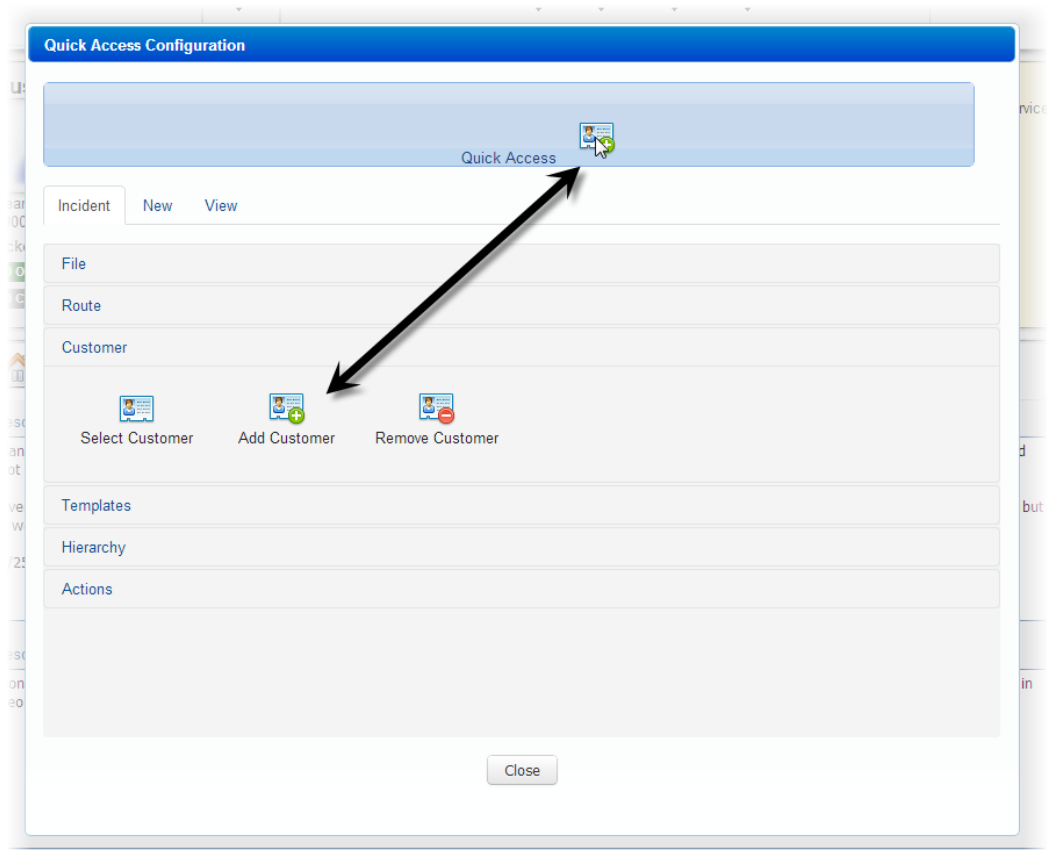
The Quick Access Configuration dialog box displays.

3. Select **Customer** from the **Incident** tab.

The screenshot shows the 'Quick Access Configuration' dialog box. It has a title bar 'Quick Access Configuration' and a 'Close' button at the bottom right. The dialog is divided into two main sections. The top section, titled 'Quick Access', contains a list of items: 'Incident', 'New', and 'View'. The bottom section, titled 'Incident', contains a list of items: 'File', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Actions'. An arrow points to the 'Customer' item in the 'Incident' list.

The Customer options expand.

4. Click and drag the **Add Customer** icon up into the **Quick Access Bar**.
5. Click Close.



The new Add Customer quick access icon appears near the tabs at the top of the window.

Now you have a shortcut to creating a new customer.

There are many other ways to customize and reshape your iSupport software so that it suits your work style and needs. We encourage you to experiment with them.

