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.

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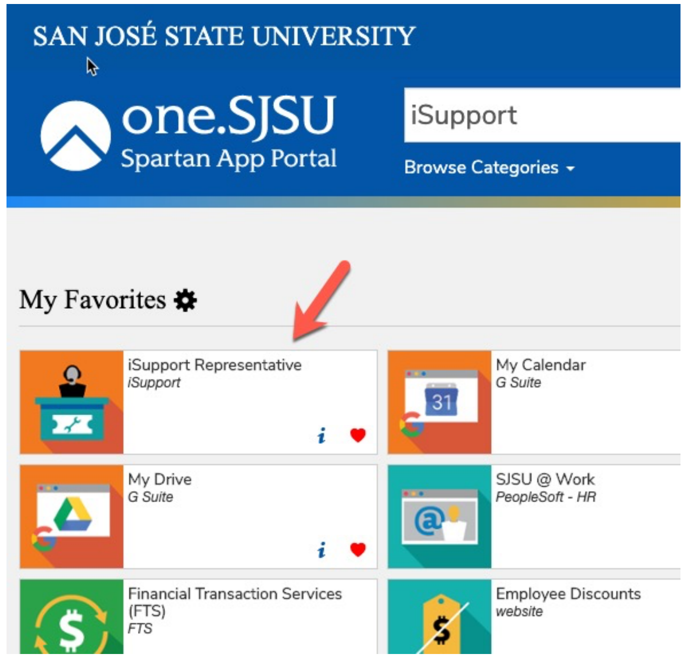
Creating a New Incident

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.

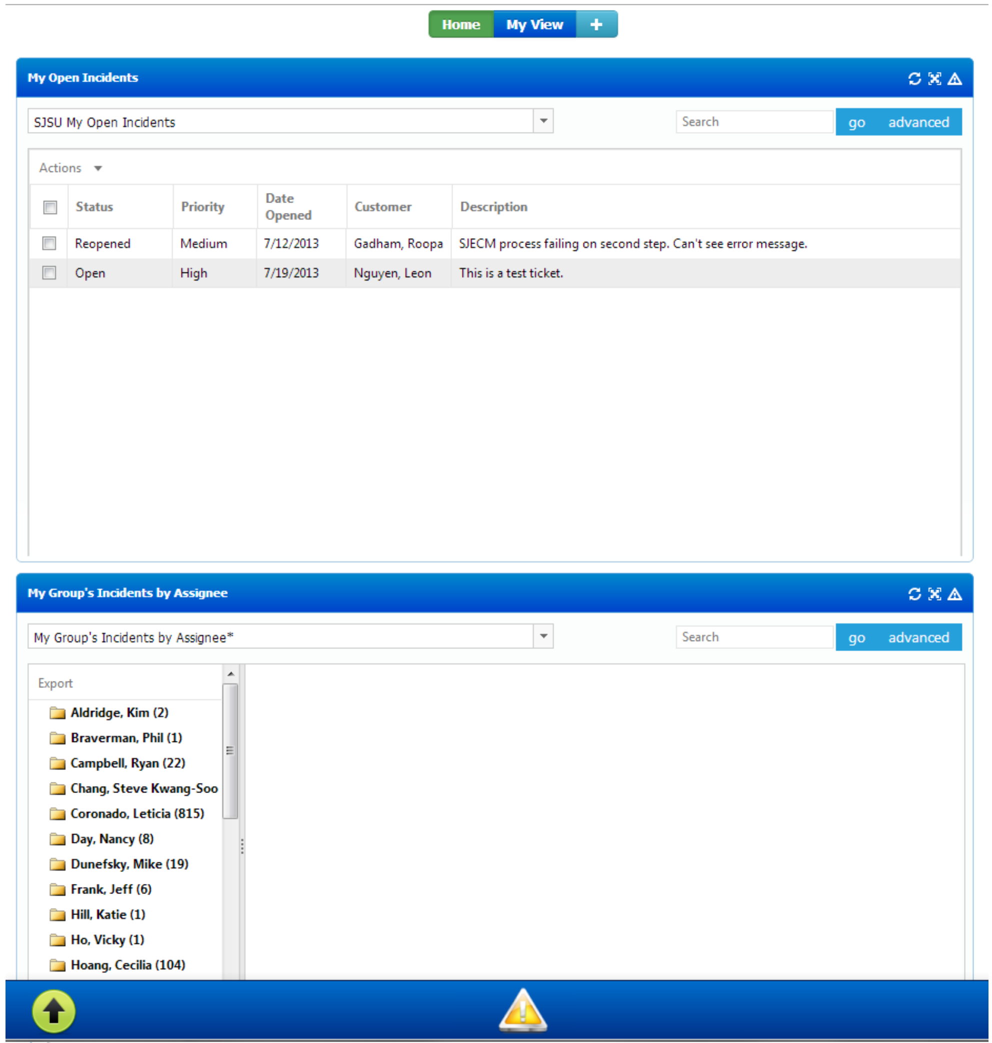
1. Navigate to one.SJSU.edu
2. Search for iSupport Representative Tile.

- Click on the tile and log in with your SJSUOne ID and Password.

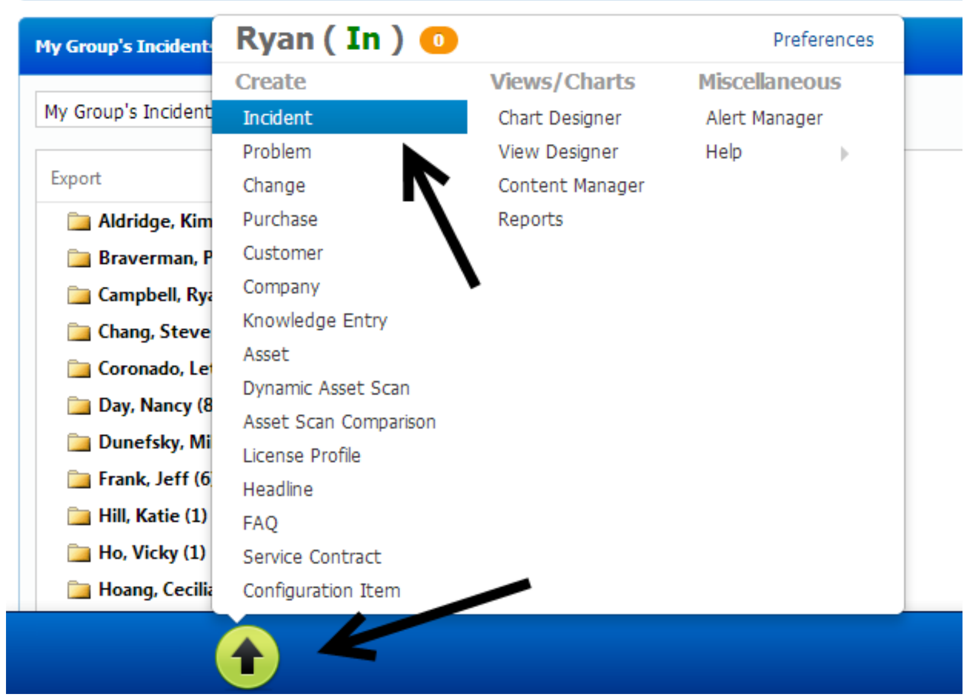


The iSupport Home View page displays.

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

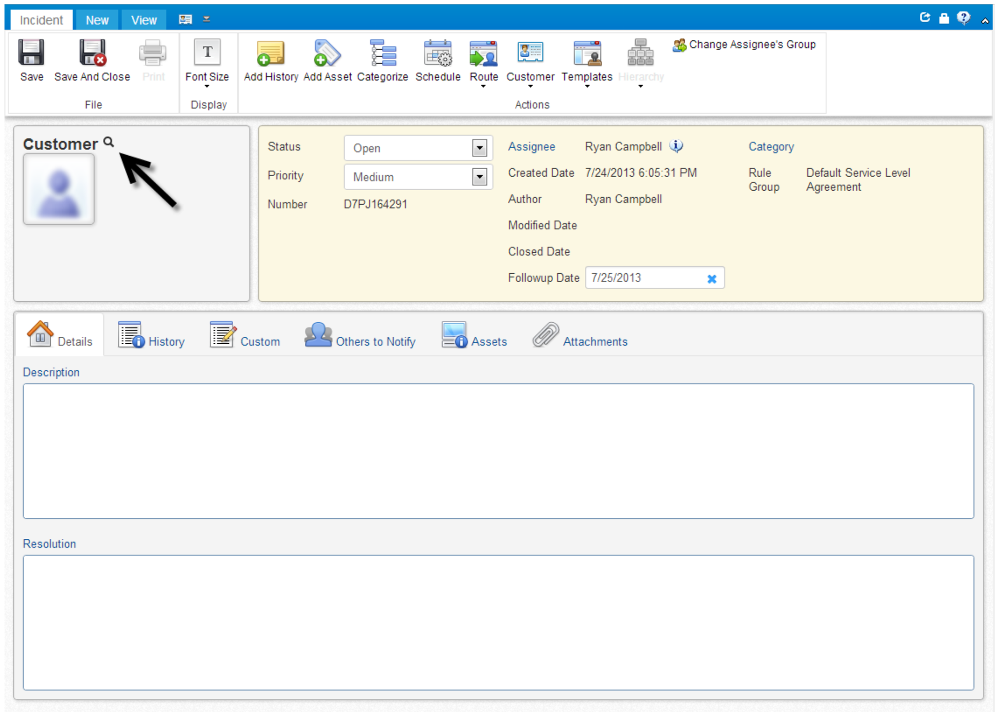


3. Click the **More** (green arrow) icon.
4. Select **Create Incident.**



The New Incident Ticket page displays.

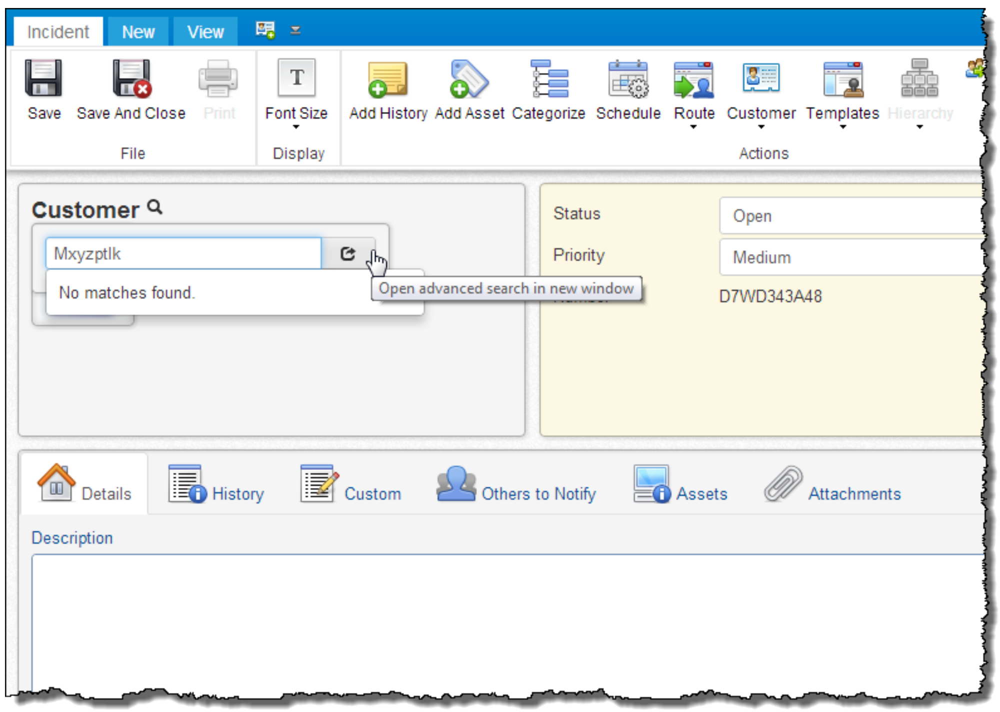
5. Click the **Select Customer** (Magnifying Glass) icon.



The customer search box displays.

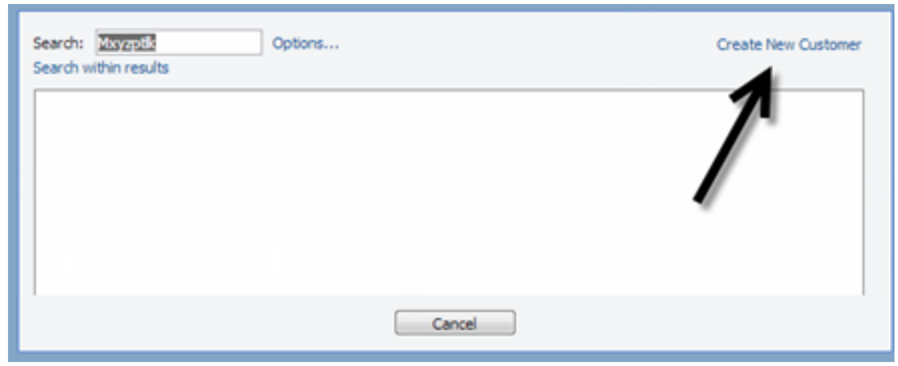
6. Type any part of the customer's name, email address, SJSU ID, or phone number to see a list of results. Click to select the customer.
7. If the customer does not appear in the search, you will need to add a new customer. Click the **Advanced Search** icon.

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.



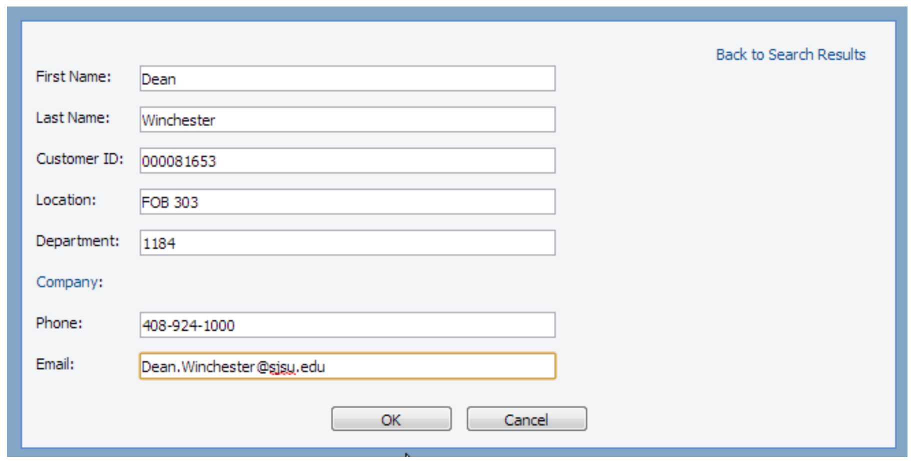
The Select Customer Advanced Search box displays.

8. Click **Create New Customer.**



The Search box updates with the New Customer form

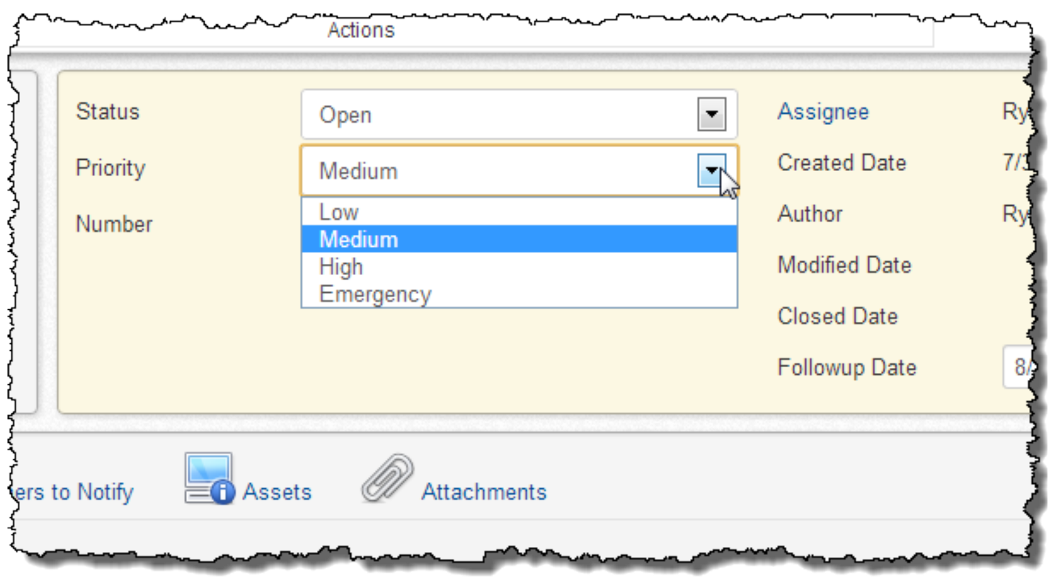
9. Enter the customer's information, including **First Name**, **Last Name**, **Phone**, and **Email**.
10. Enter the customer's SJSU ID in the **Customer ID** field.
11. Click **OK**



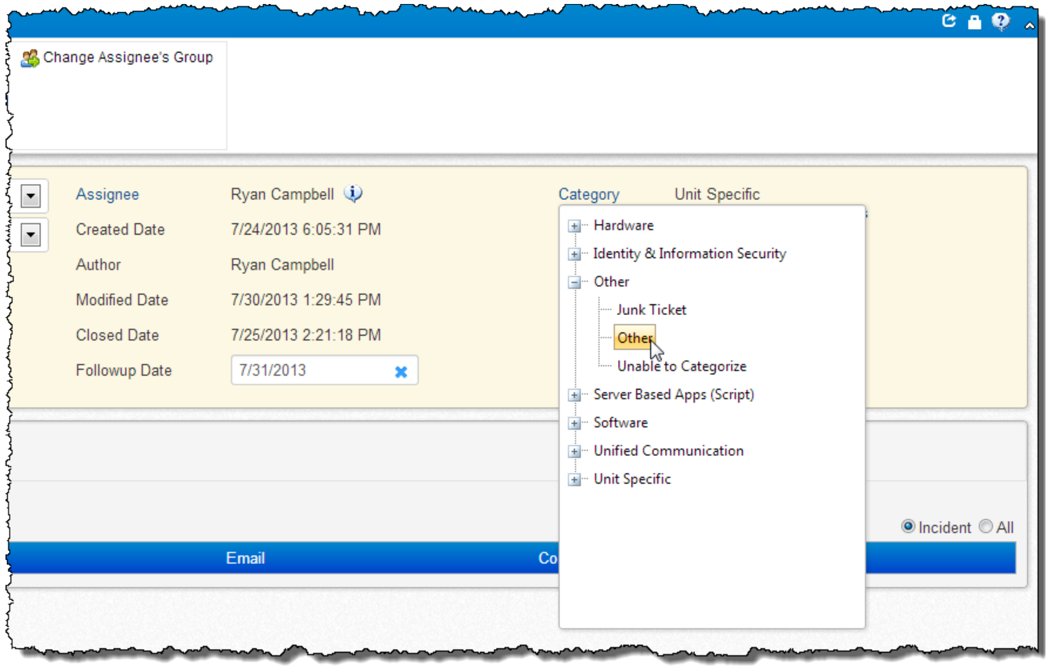
The New Incident window updates with the Customer information.

12. Select the **Incident Priority**.

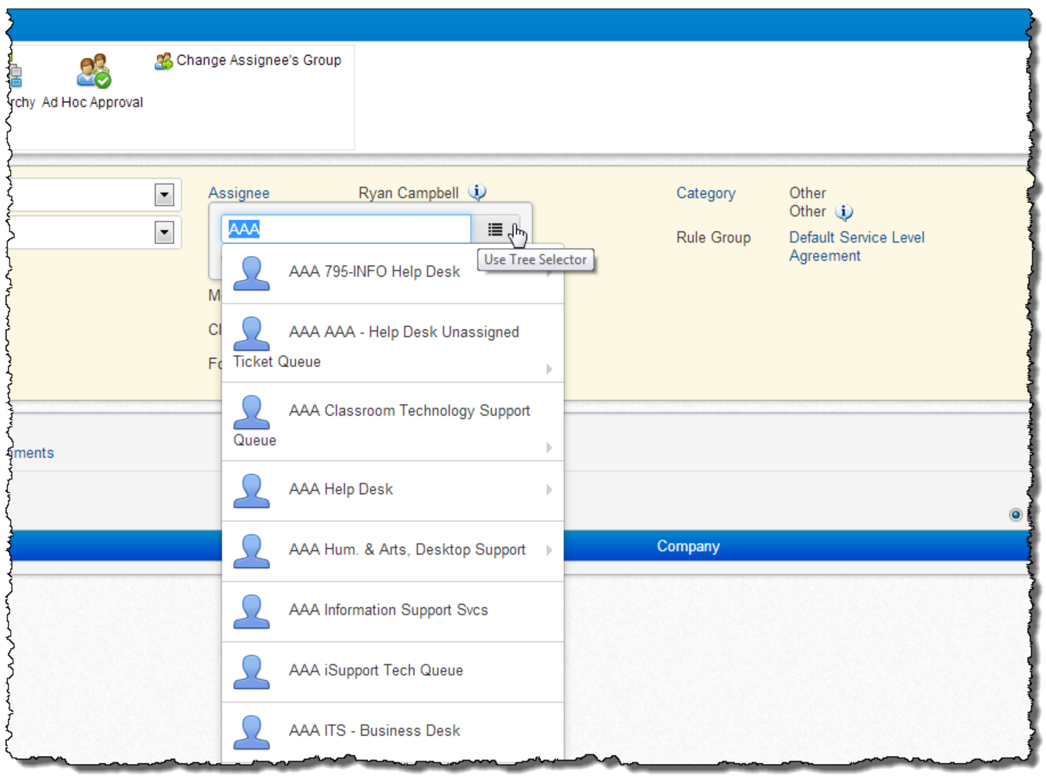
- **Low**: Incidents for problems that have workarounds or do not stop work
- **Medium**: Incidents that restrict some job functions
- **High**: Incidents that stop work for at least one customer, or have urgent deadlines
- **Emergency**: Reserved for failed systems that stop critical work for multiple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



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

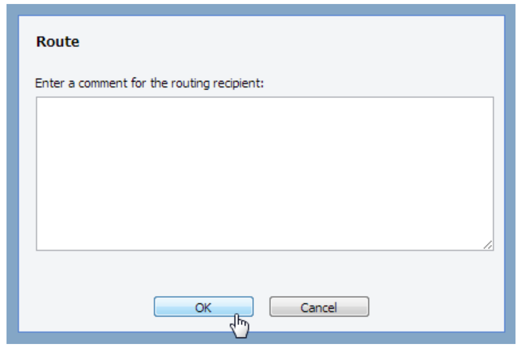


14. Select the **Incident Assignee** by clicking Assignee, typing any part of the assignee's name, and selecting the desired person or group. You can also click the **Tree Selector** to pick the assignee from a list.



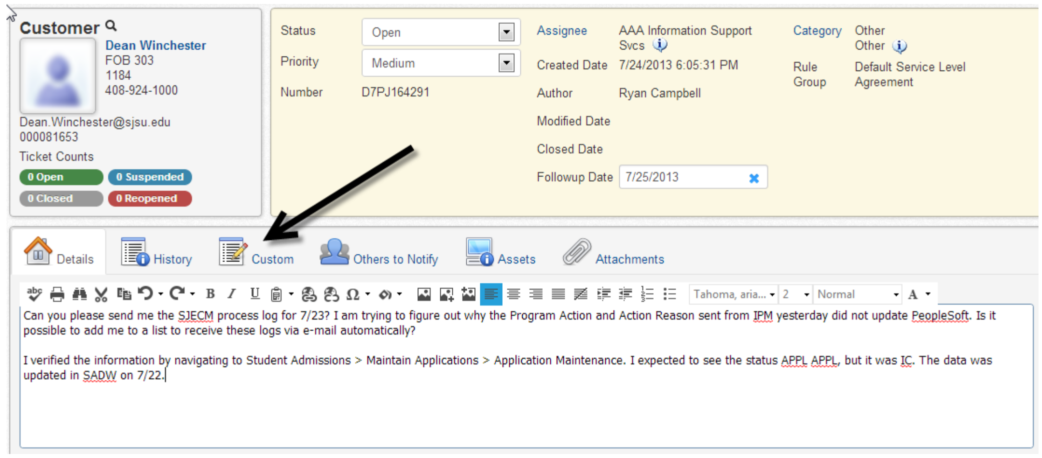
The Route comment box displays.

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**.



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.

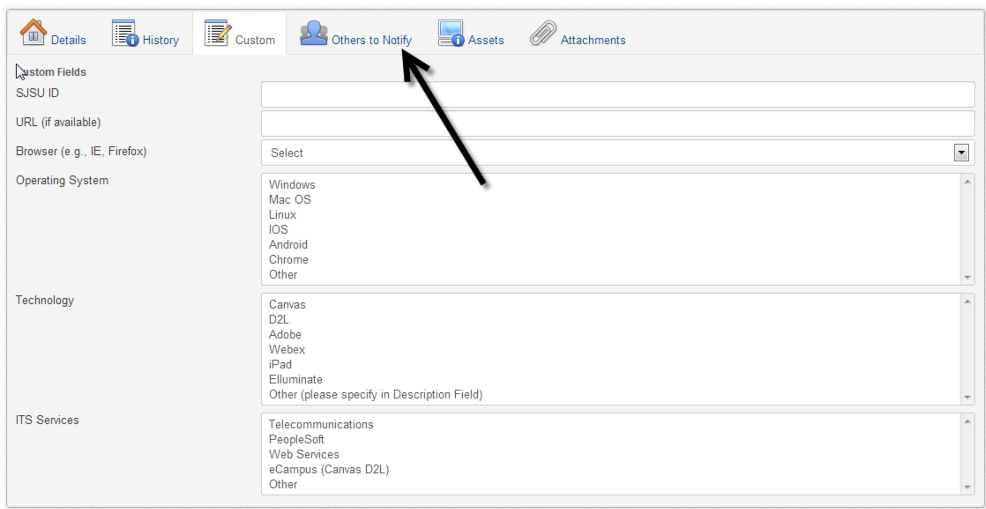


The Custom Fields pagelet displays.

18. Enter any relevant information.

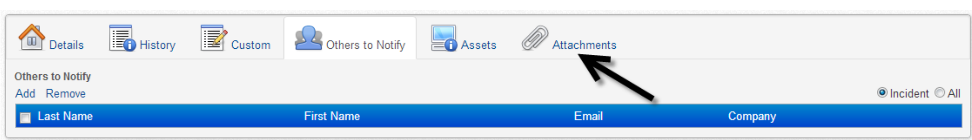
NOTE: This step is optional. Many incidents will not require the information on this page.

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



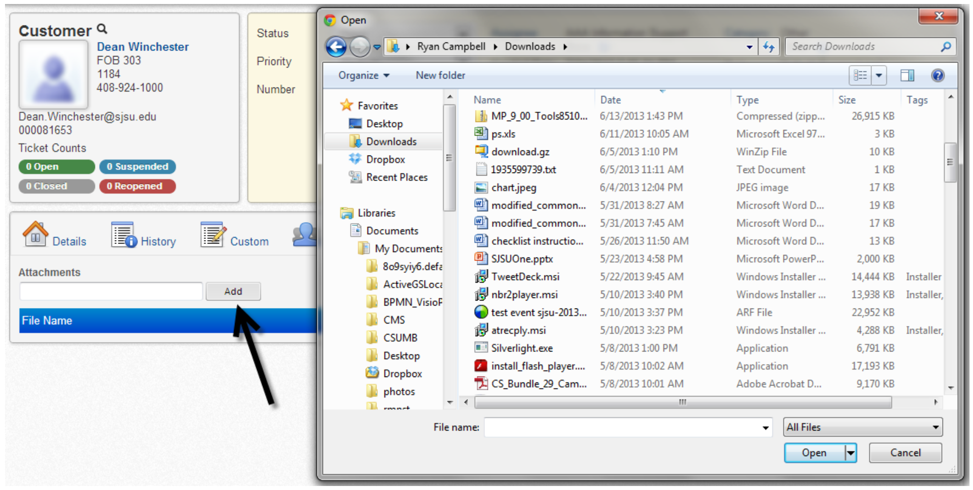
The Others to Notify pagelet displays.

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.



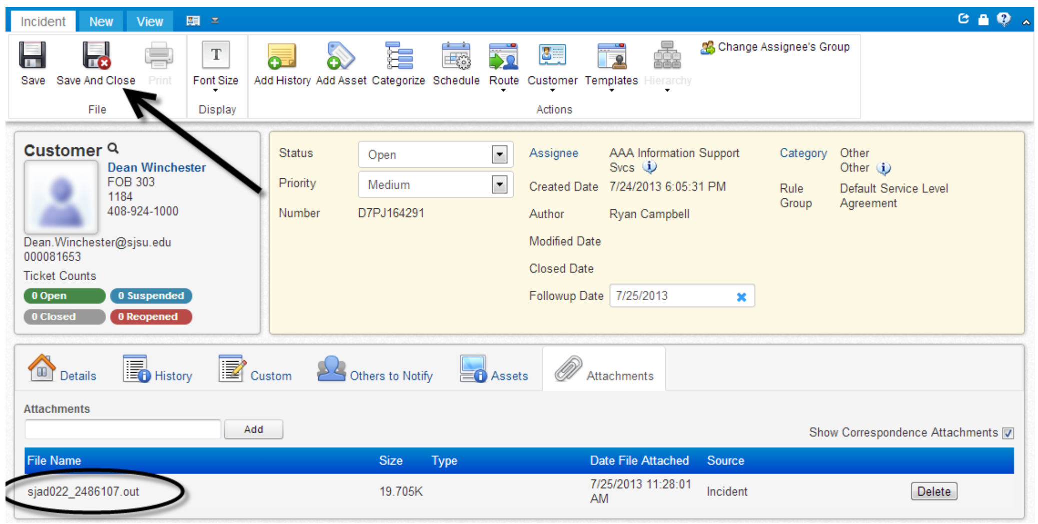
The Attachments pagelet displays.

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.

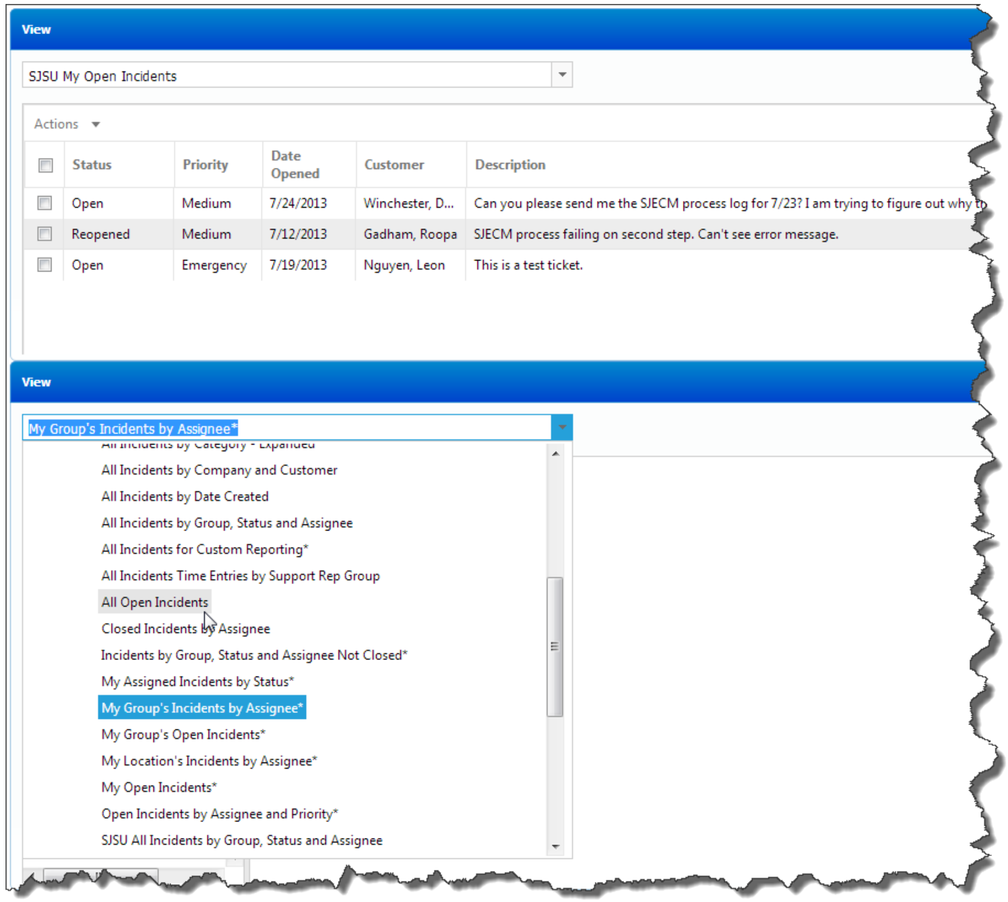
22. Click Save and Close to save the Incident and automatically notify the customer and assignee.



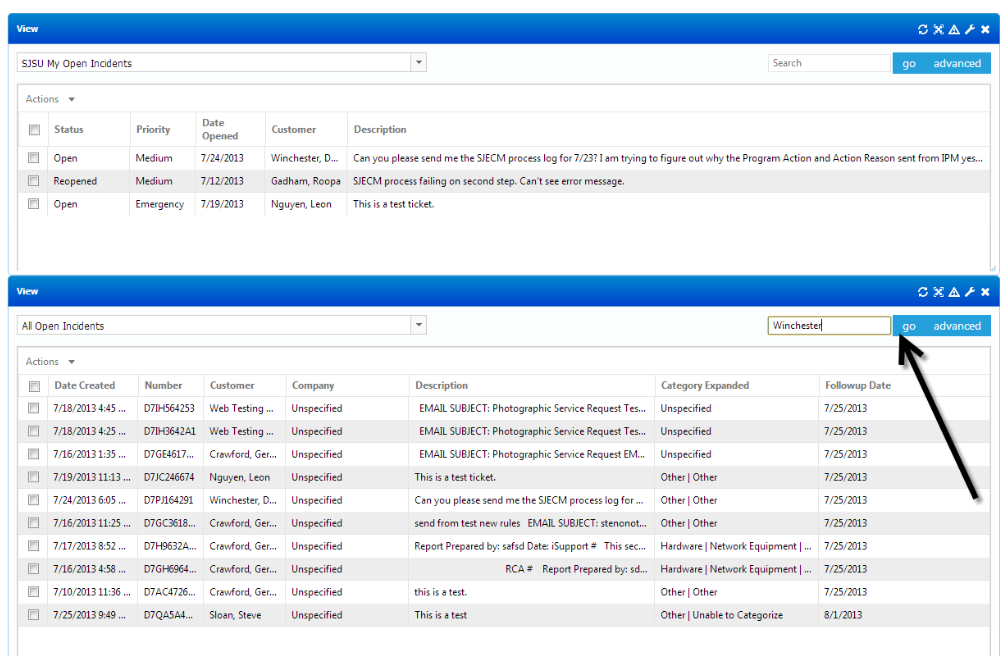
Updating an Incident

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.

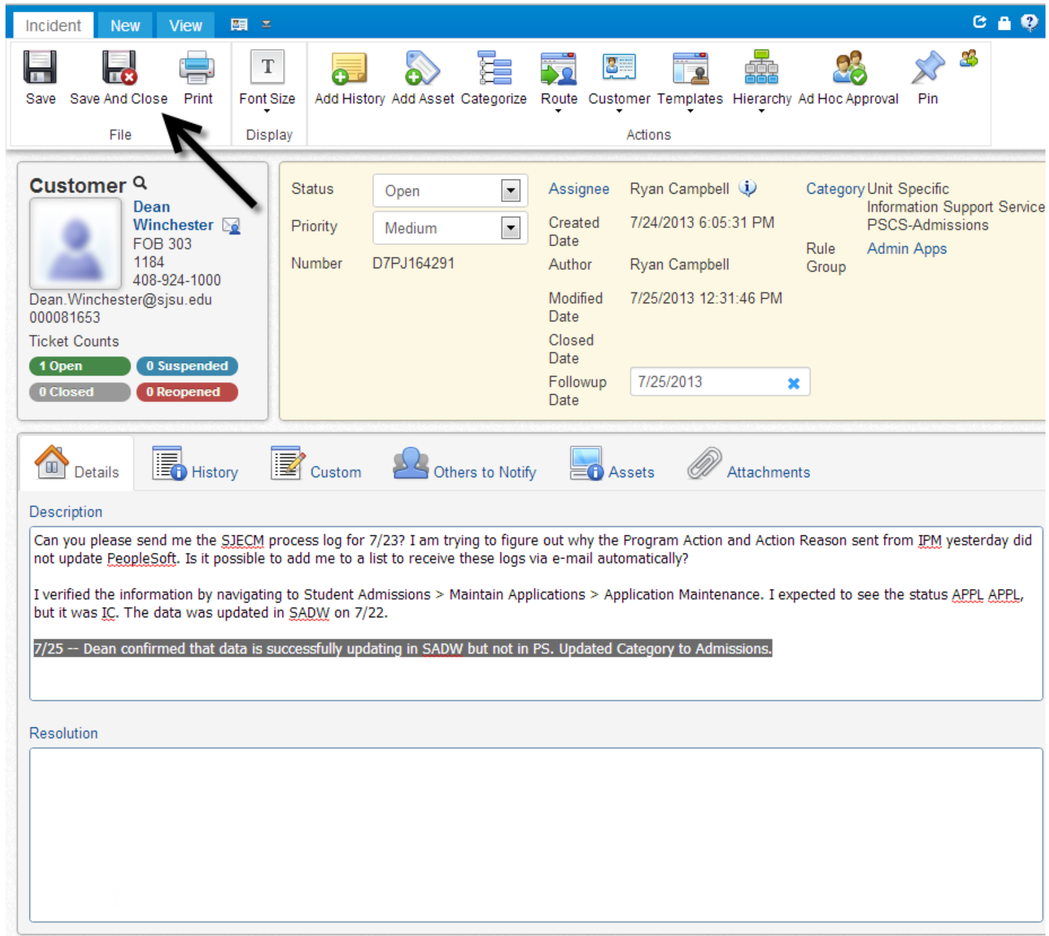
1. If the incident you wish to update is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this view by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



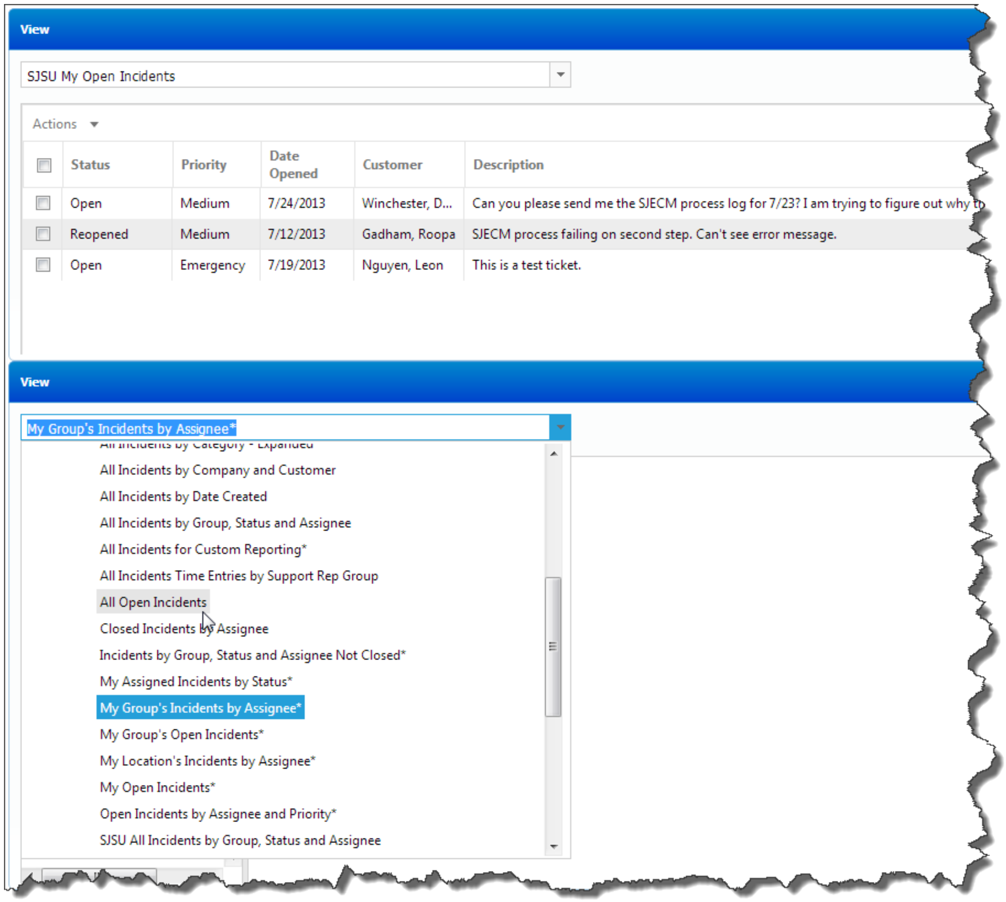
6. Update the **Priority**, **Assignee**, or **Category** as necessary. Explain any changes or updates to the incident in the **Description** field.
7. Update the **Description** field with any new information, including progress made on the problem, or new information from the customer.
8. Use the **Custom**, **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.



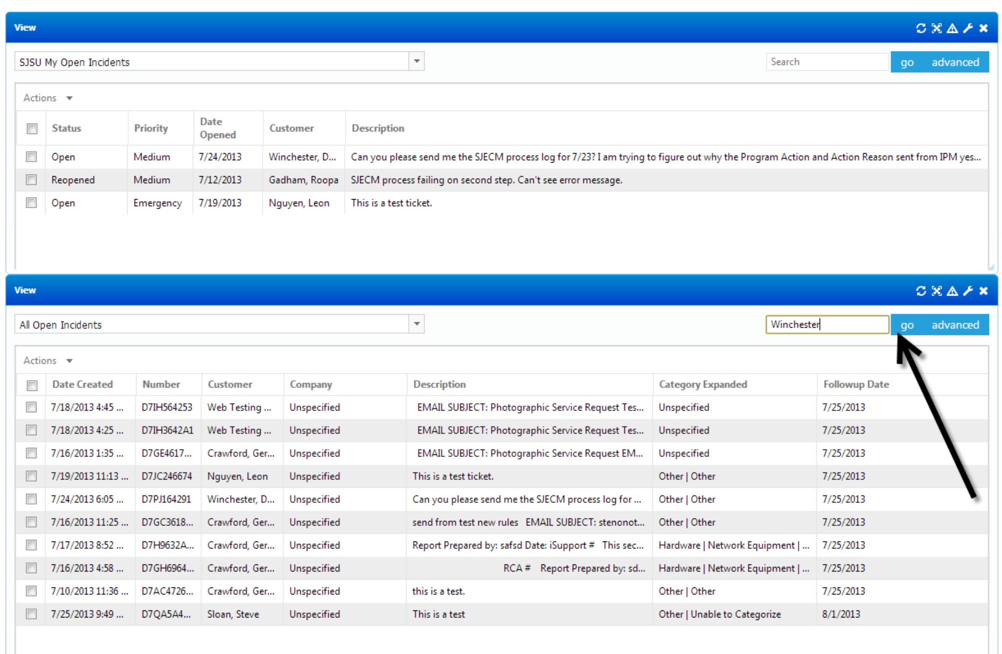
Responding to an Incident

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.

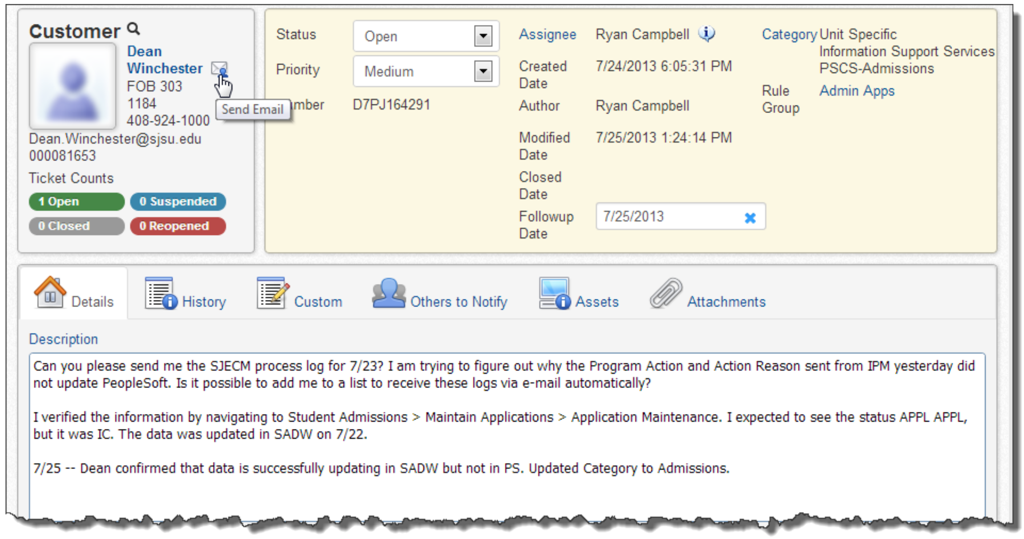
1. If the incident to which you wish to respond is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this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

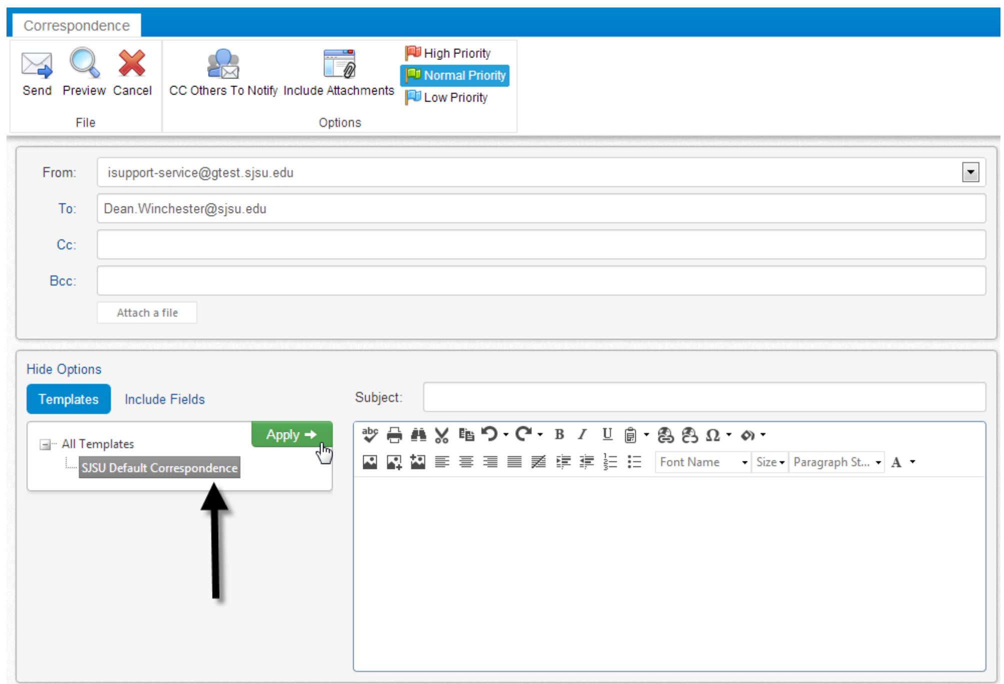


6. Click the **Send Email** (envelope) icon.



The Correspondence window displays.

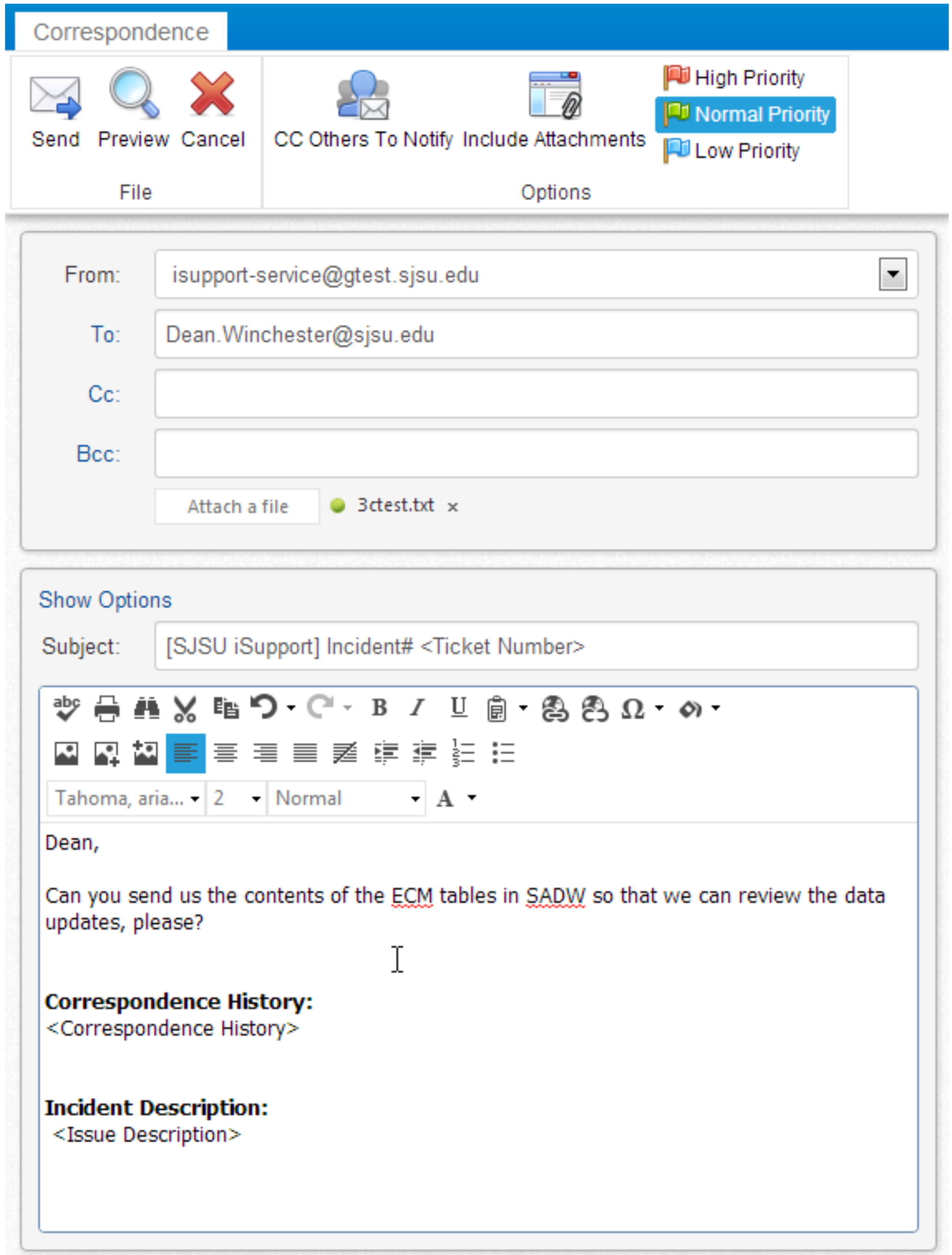
7. Under the **Templates** section, select **SJSU Default Correspondence**.
8. Click **Apply**.



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.

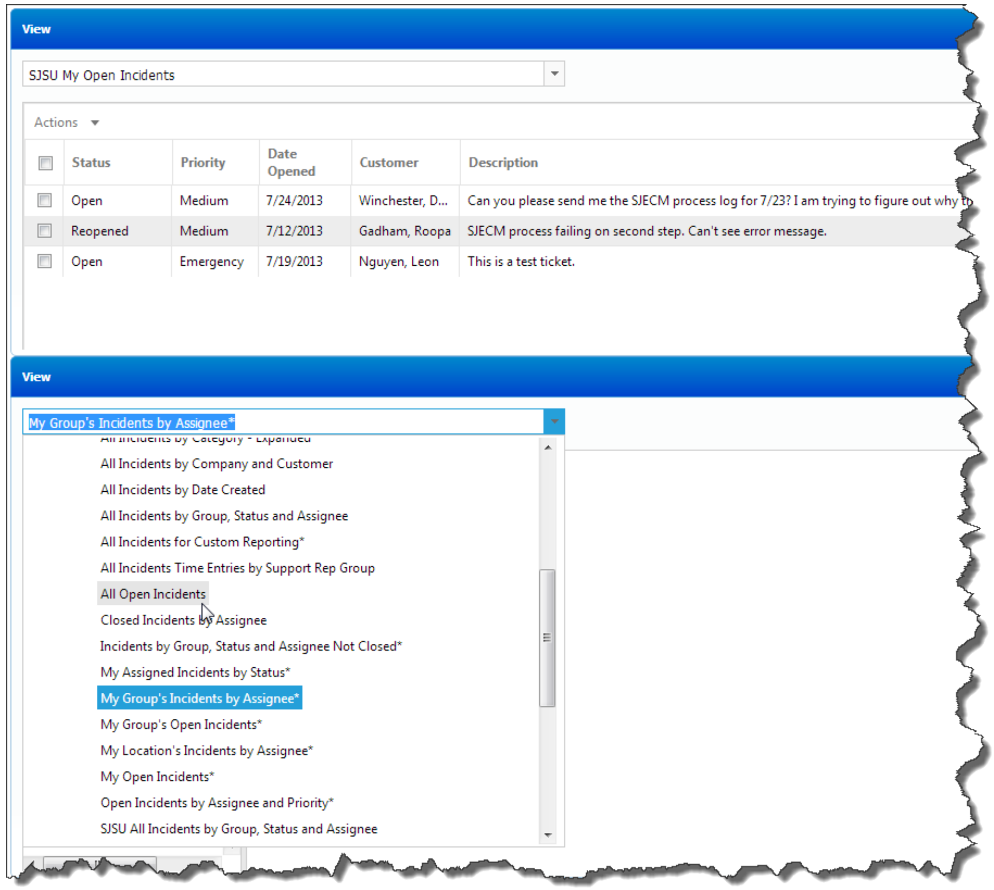
NOTE: Emails are sent from the iSupport-Service email address by default. You can change this by clicking the **From** *dropdown and selecting your own email address; however, replies will come to you instead of iSupport, and the incident will not be updated automatically.*



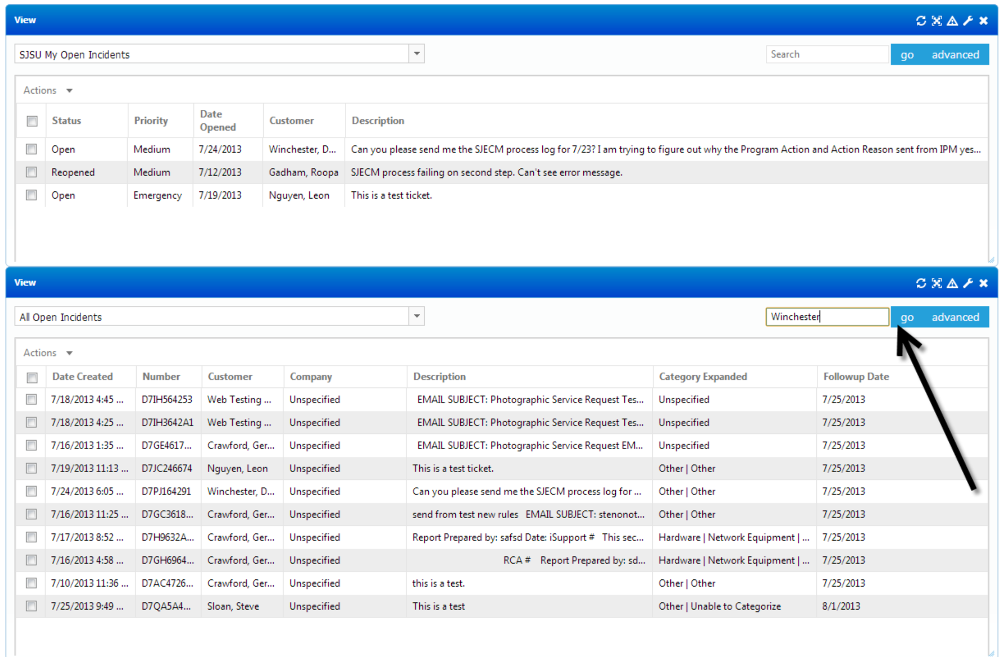
Suspending or Unsuspending an Incident

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 unsuspended 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.

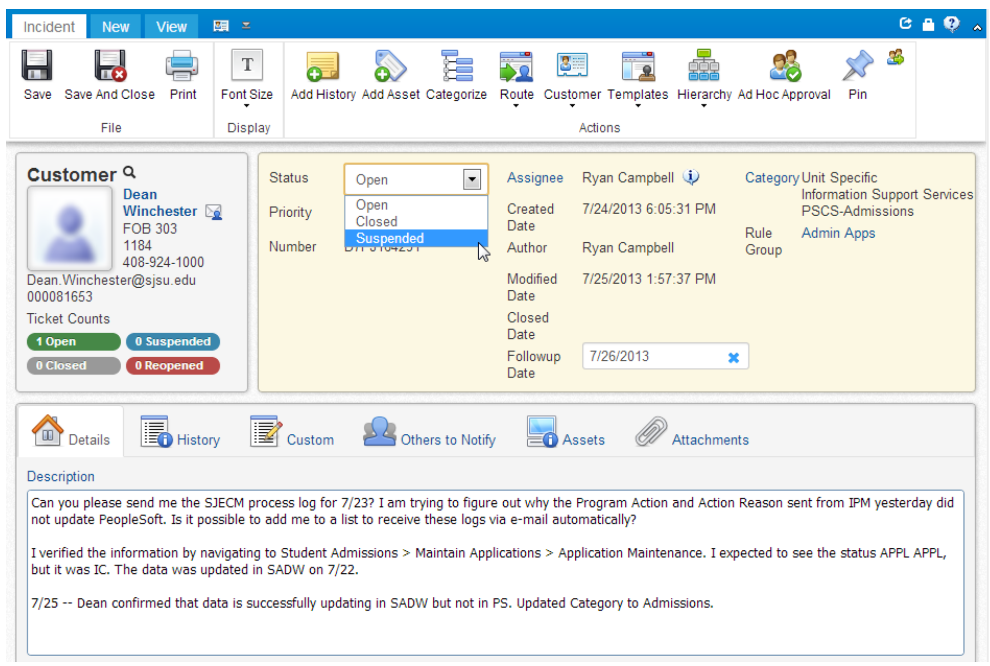


3. Type any part of the incident information in the **Search** box if you need to filter the results, such as the incident number, the name of the assignee, the customer, or any word in the description. You can filter search results even more by typing in additional search terms. If you need to reset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



The Incident window displays.

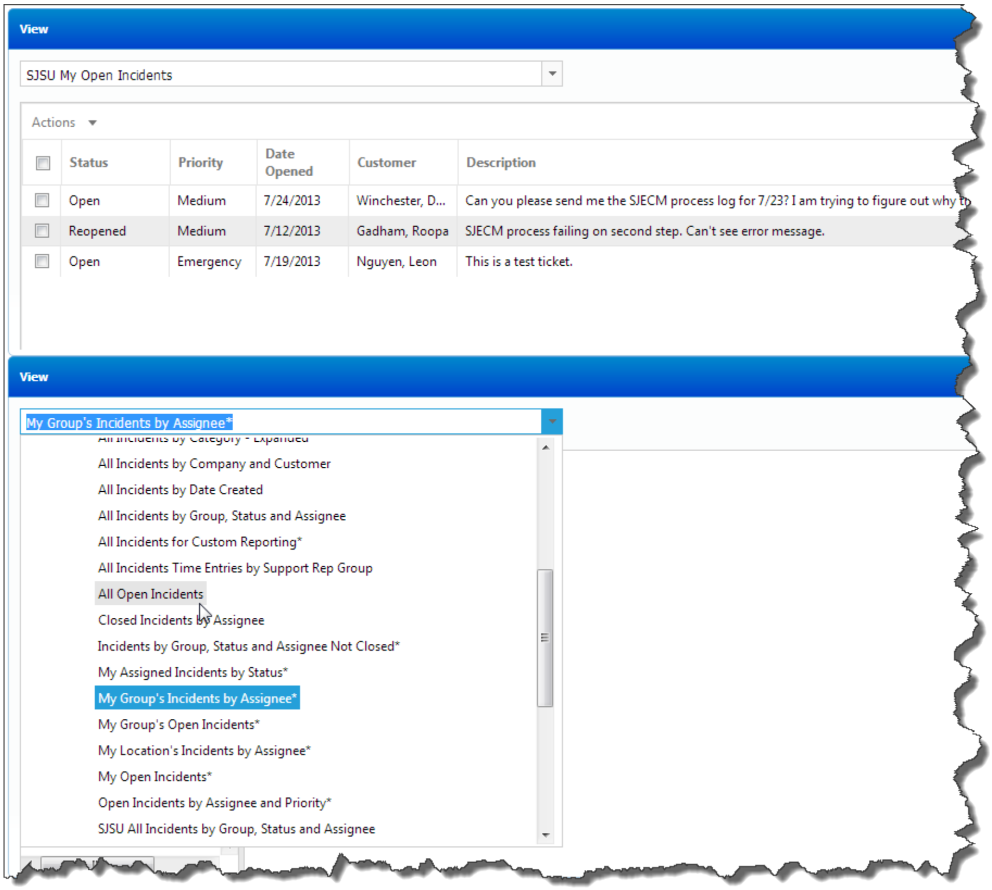
6. Click the **Status** dropdown list. Choose either the **Suspend** status to suspend the incident, or Open to unsuspend.
7. Update the **Description** with the reason for suspending or Unsuspending.
8. Click **Save And Close** to save the incident and automatically notify the assignee and customer.



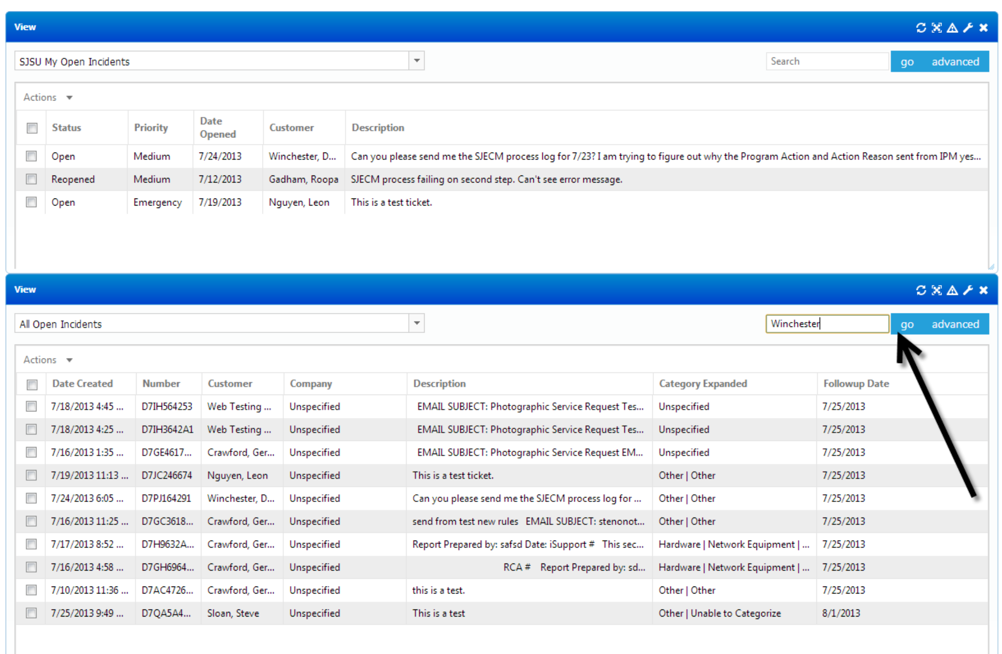
Closing an Incident

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.

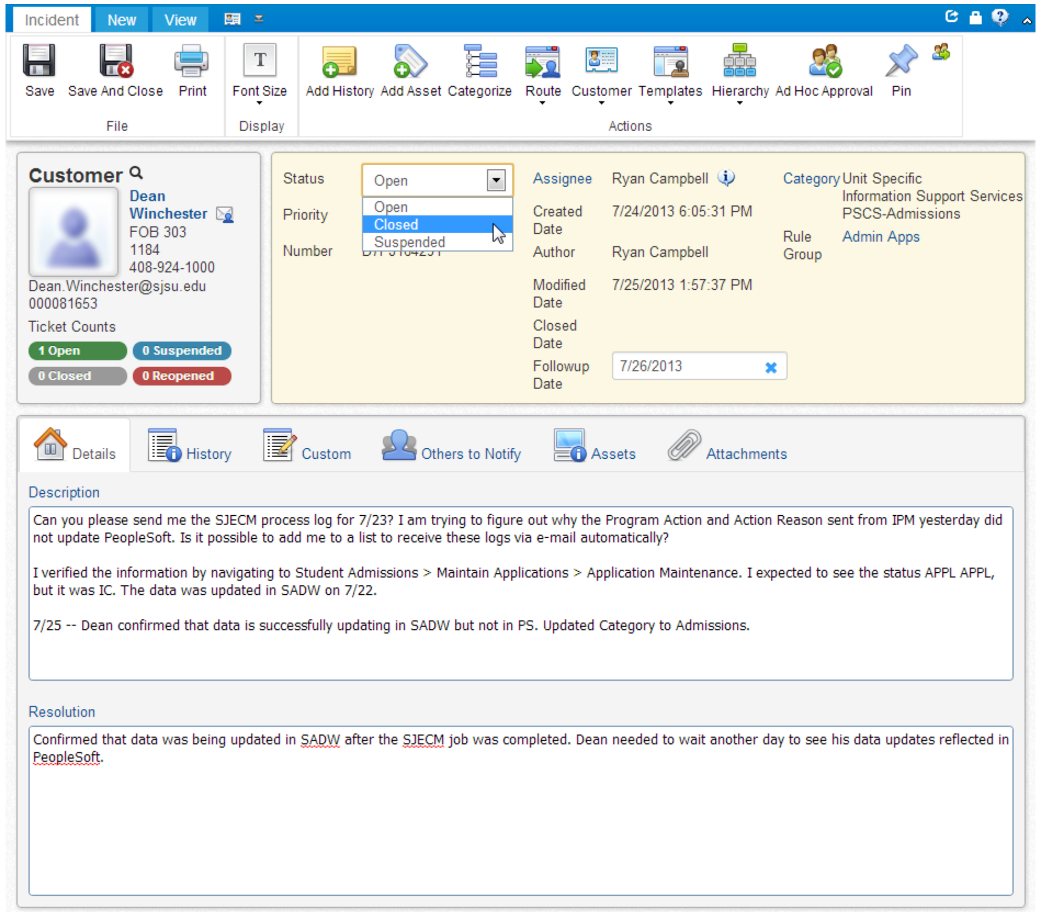
1. If the incident you wish to close is assigned to you, select it from **SJSU My Open Incidents** and skip to step 6.
2. If the incident is not assigned to you, you can search for it using the views below. The default view is **SJSU My Group's Incidents by Assignee**, but you can change this view by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

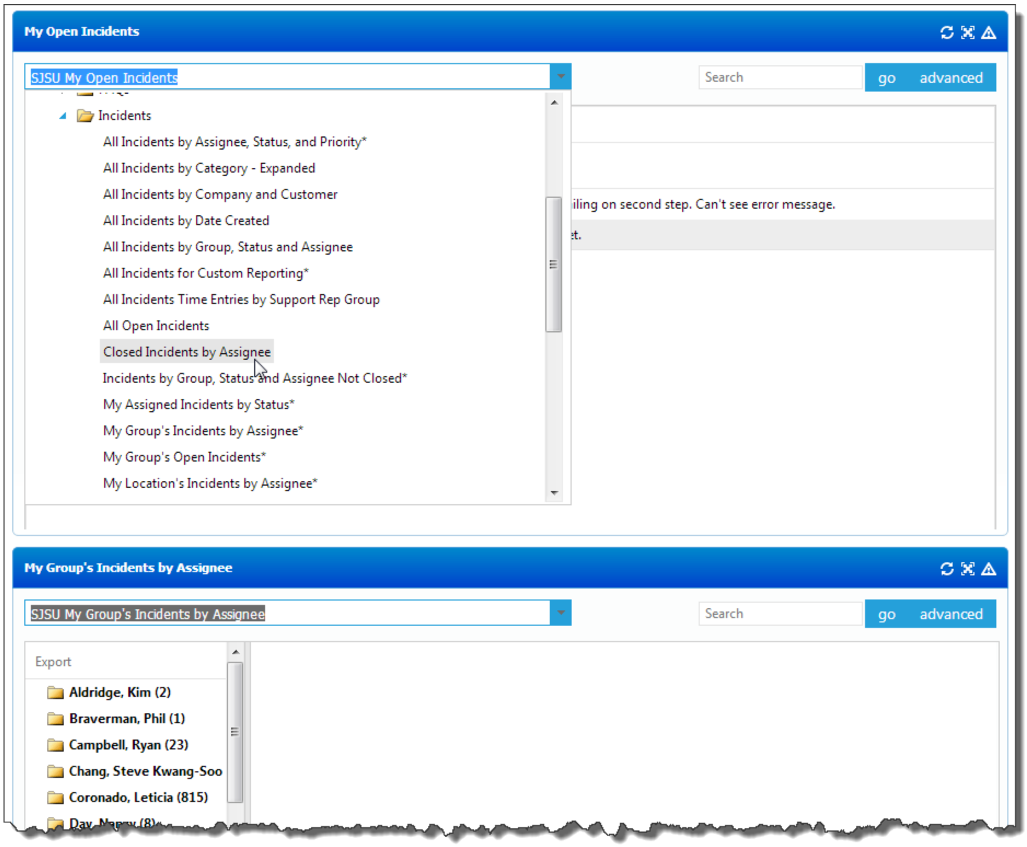


Reopening an Incident

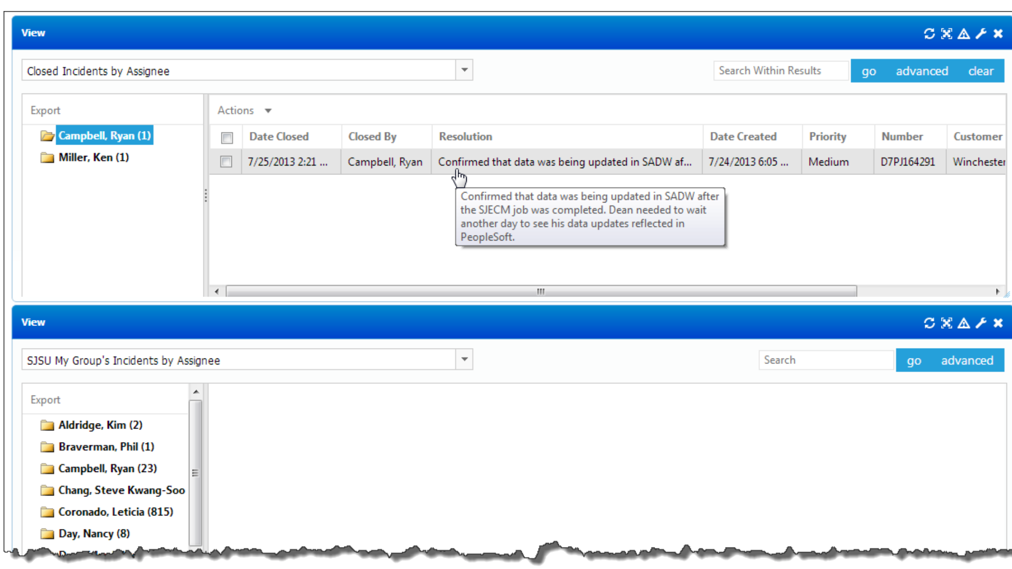
Occasionally a ticket will need to be reopened—maybe the proposed solution didn't actually solve the problem, or maybe the problem was just a symptom of a larger issue. But for whatever reason, sometimes it is necessary to open the incident again.

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.

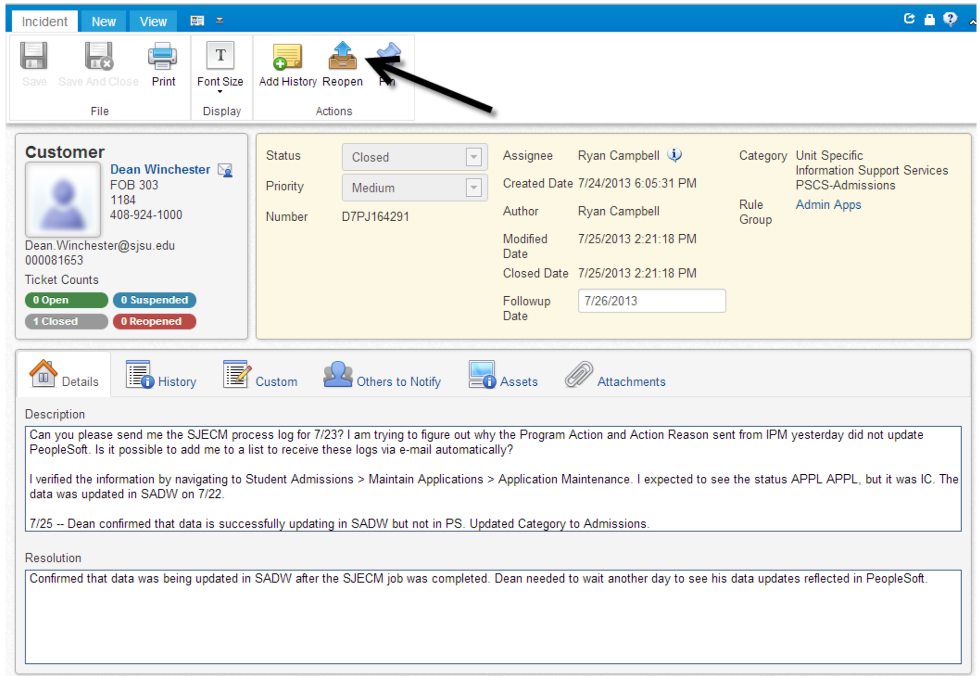
NOTE: You can also use the default view in the bottom window, SJSU My Group's Incidents by Assignee, but this will not restrict the search to closed incidents.



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.

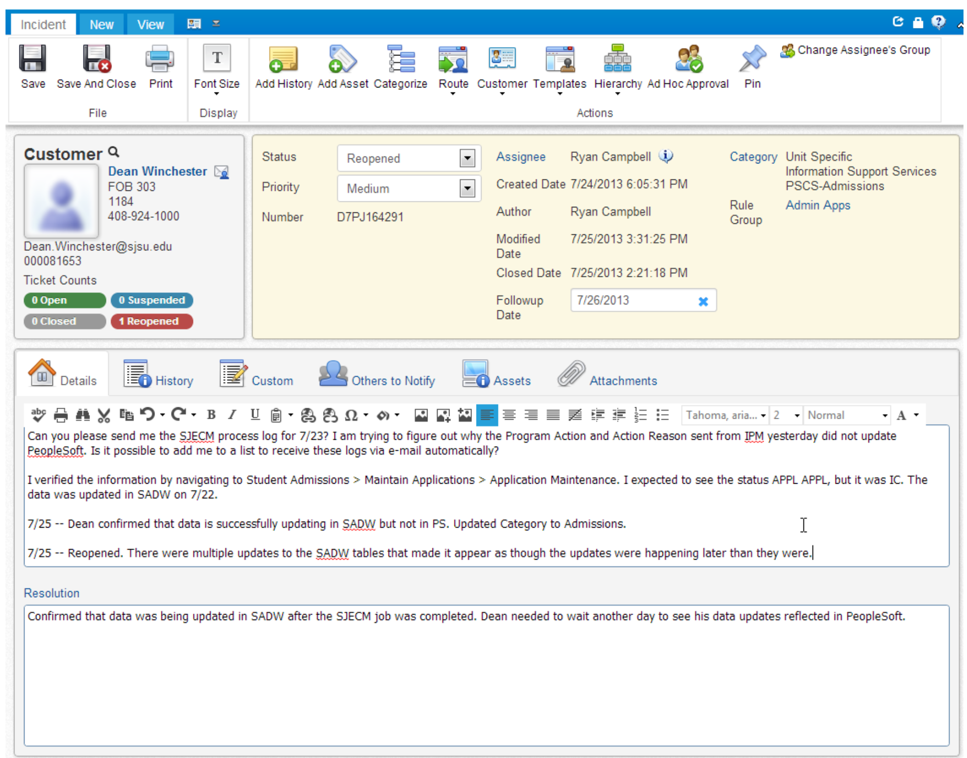


5. Click the **Reopen** icon.



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.



iSupport Dashboard Tips and Tricks

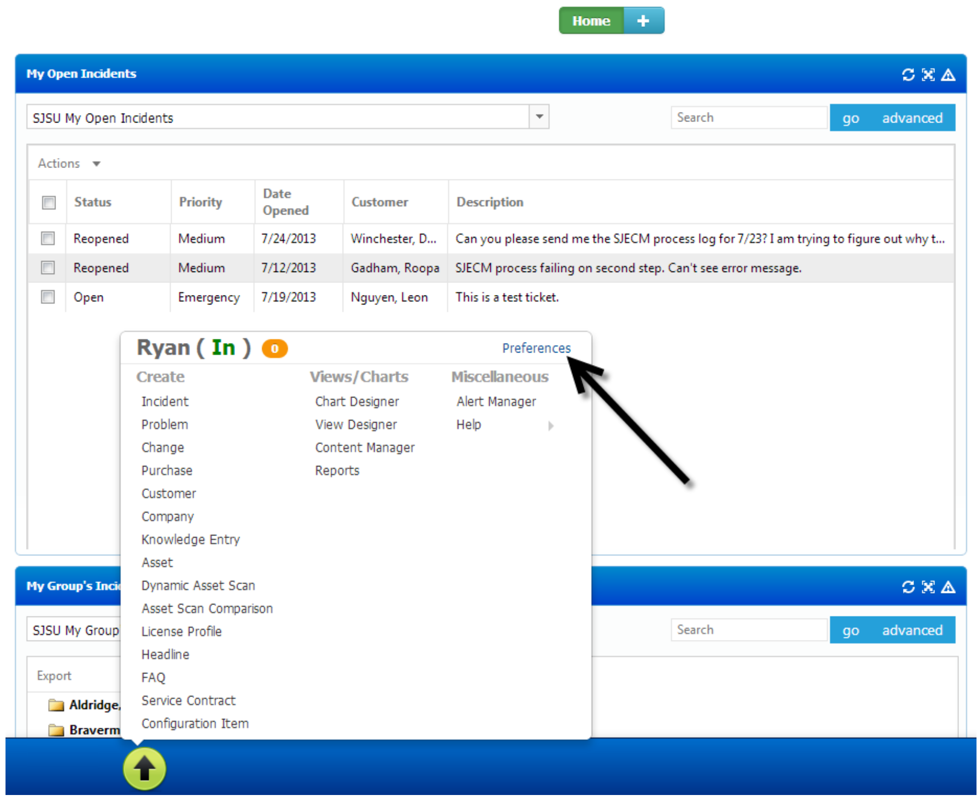
By default, iSupport starts out with the default Home dashboard, which is standardized for all users across the campus. However, iSupport is flexible and highly customizable. This section will describe the customization options available to you so that you can best suit the software to your own needs.

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.

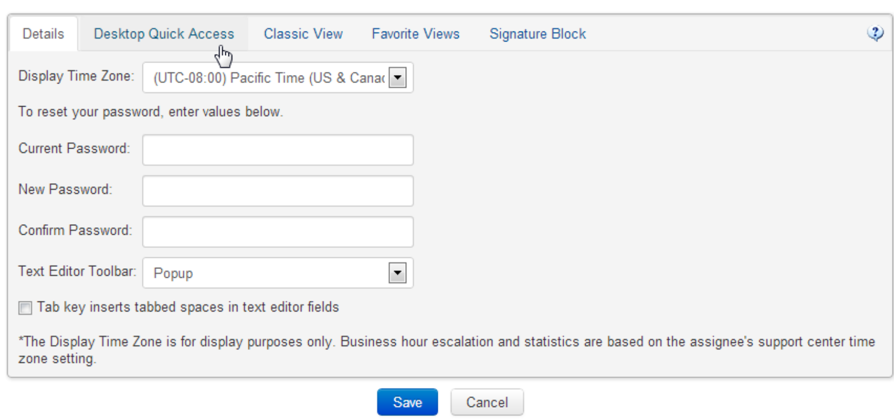
1. Click the **More** (green arrow) icon.
2. Click **Preferences** at the top right of the menu.



The Preferences page displays.

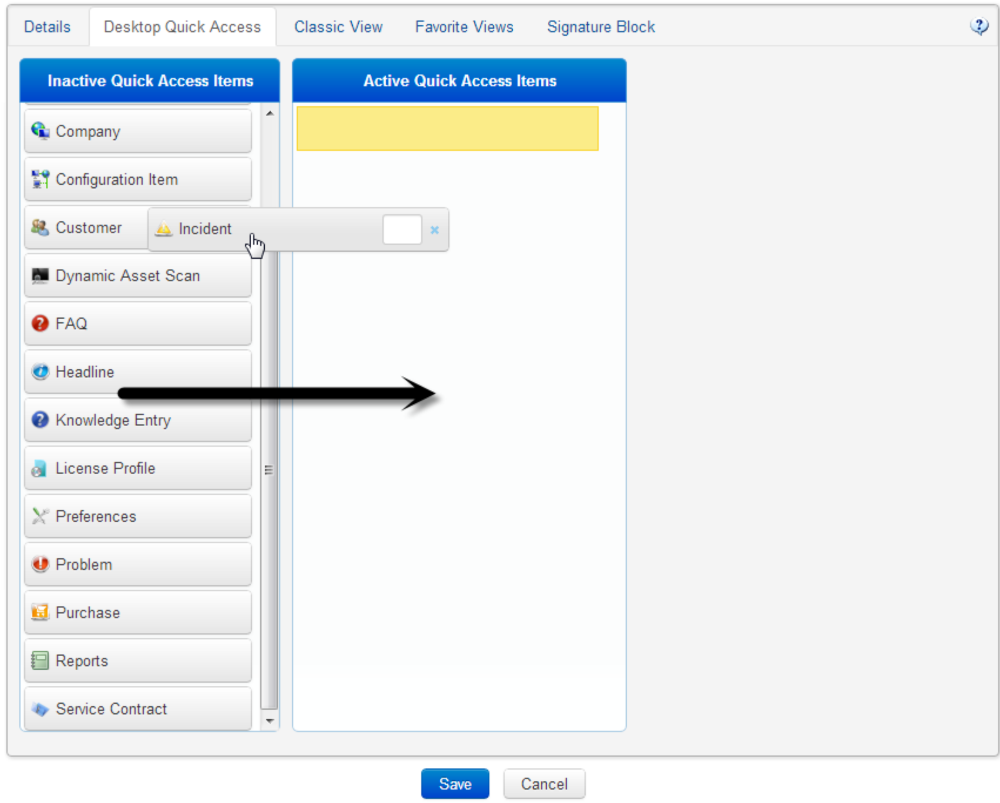
NOTE: Although you see a password reset field here, your password is managed by SJSUAD. Attempting to change your password on this page will not work.

3. Click **Desktop Quick Access**.



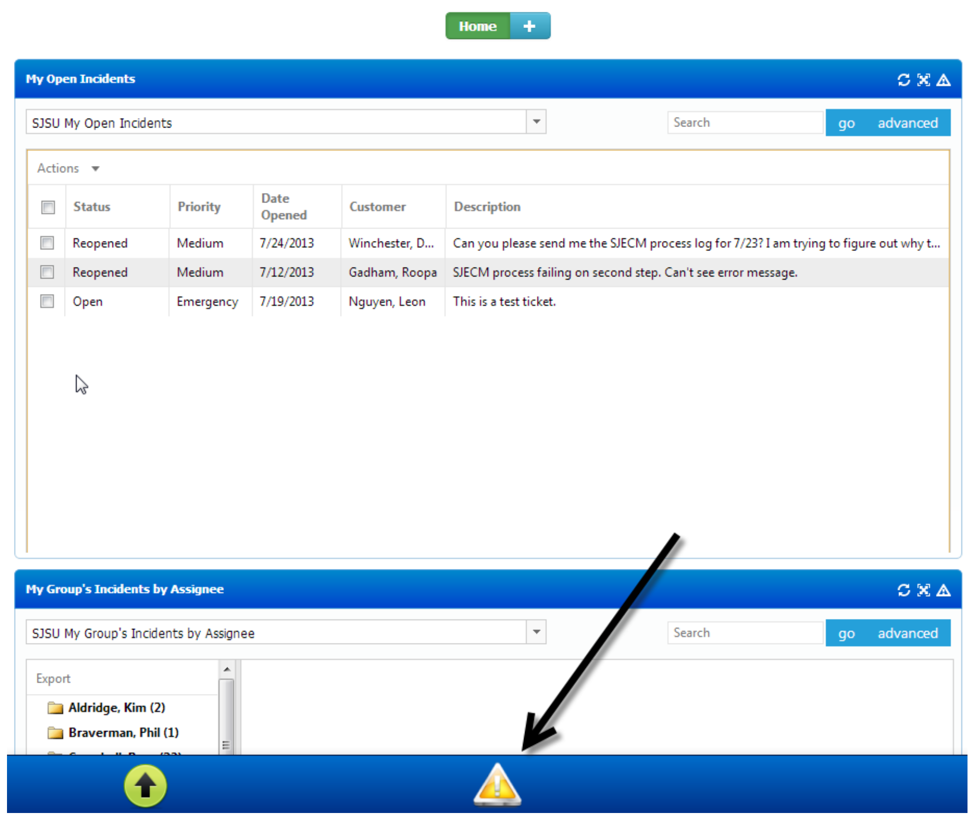
The Desktop Quick Access tab displays.

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.

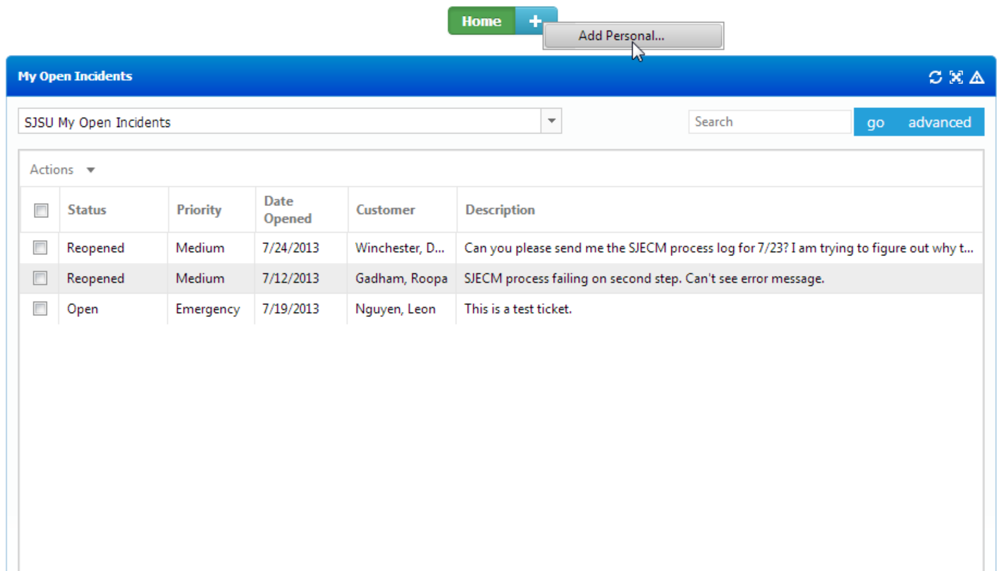
You can repeat this for any other iSupport function you use regularly, such as Customer, Headline, or Knowledge Entry.



Creating a Personalized Dashboard

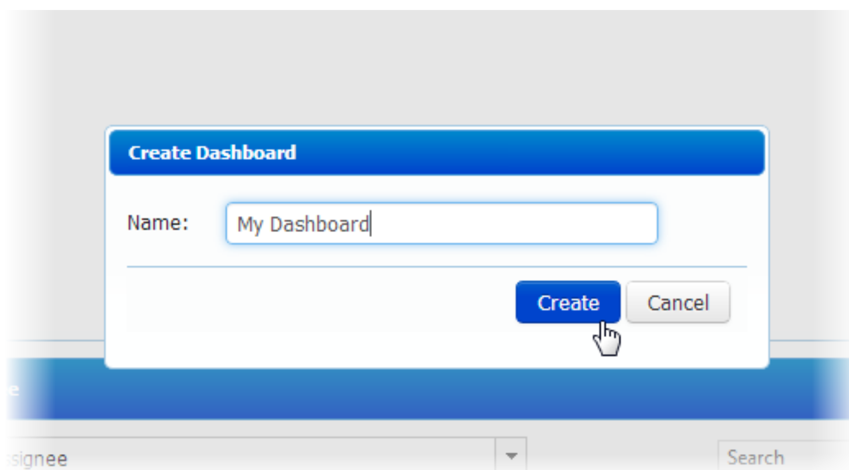
The Home dashboard that you use by default may contain the most useful features, but perhaps the windows don't fit your screen, or perhaps there are other views that you use more regularly. You can create your own dashboard so that the software is best configured to your own preferred workstyle. In addition,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

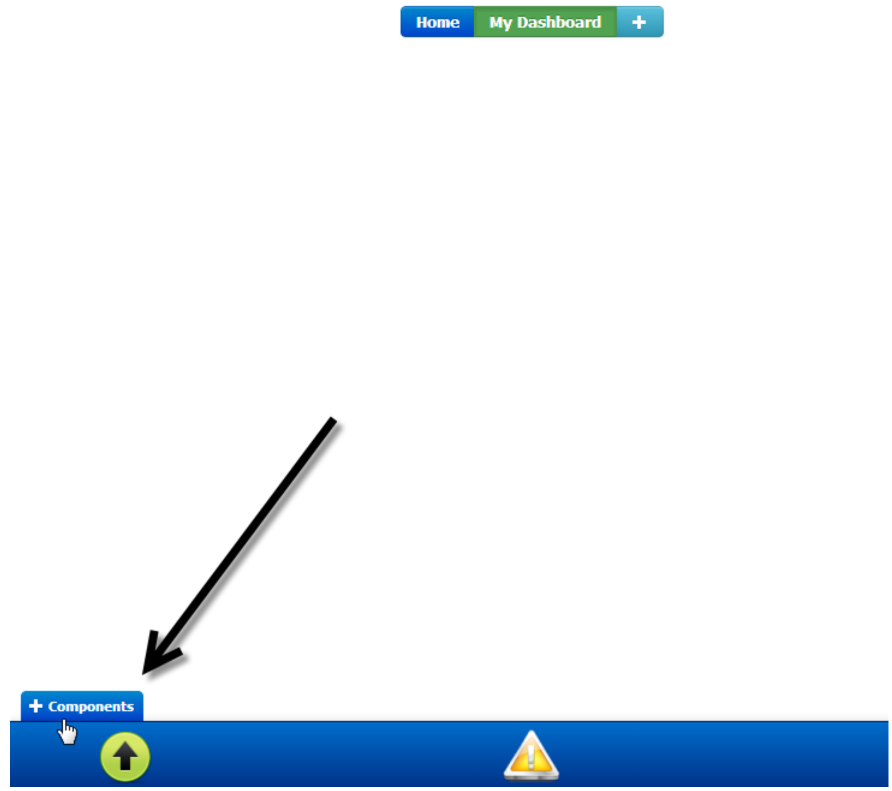
3. Type a name for your dashboard and click Create.



Your new Dashboard displays.

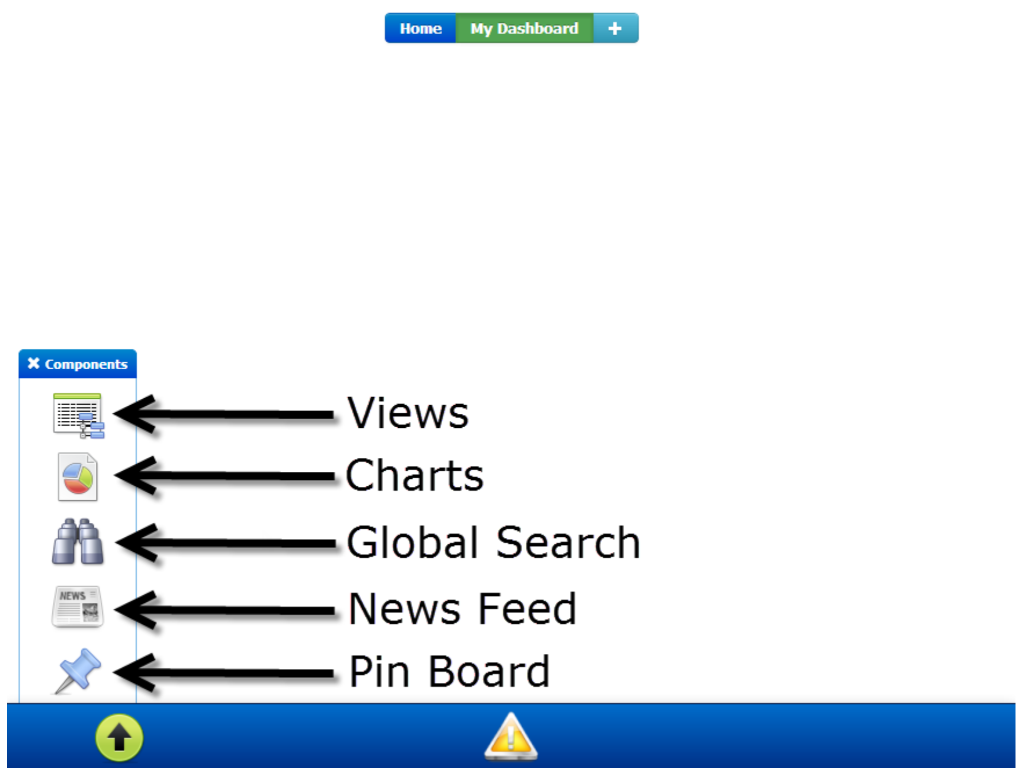
This is a blank slate, ready for you to add components. You'll notice a new tab in the lower left, labeled **+Components**.

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

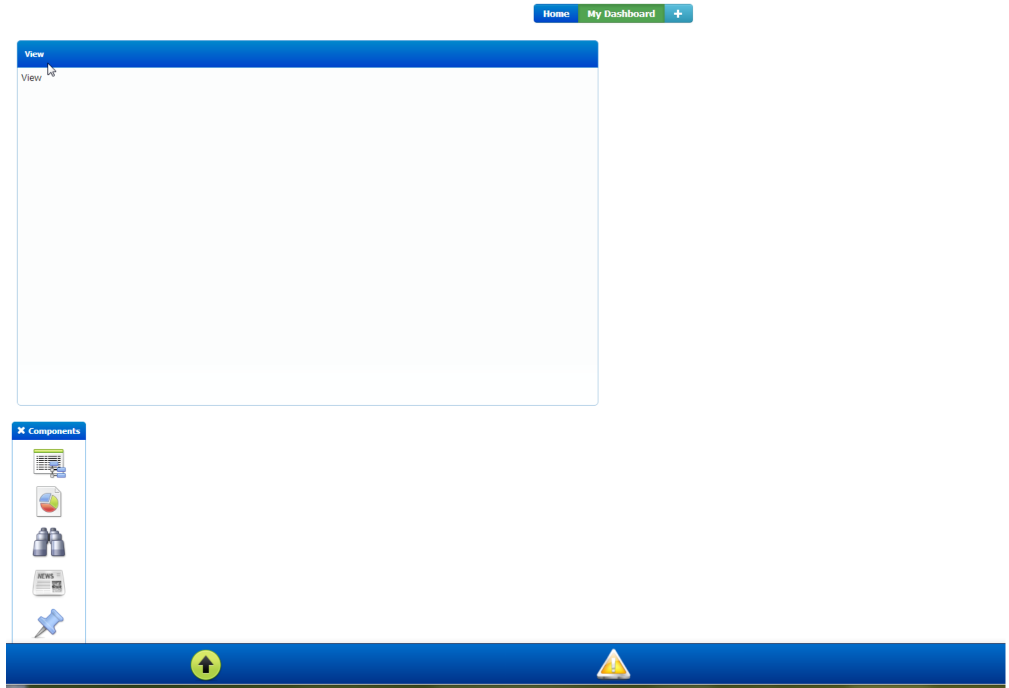


The Components Menu displays, including the following icons:

- **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

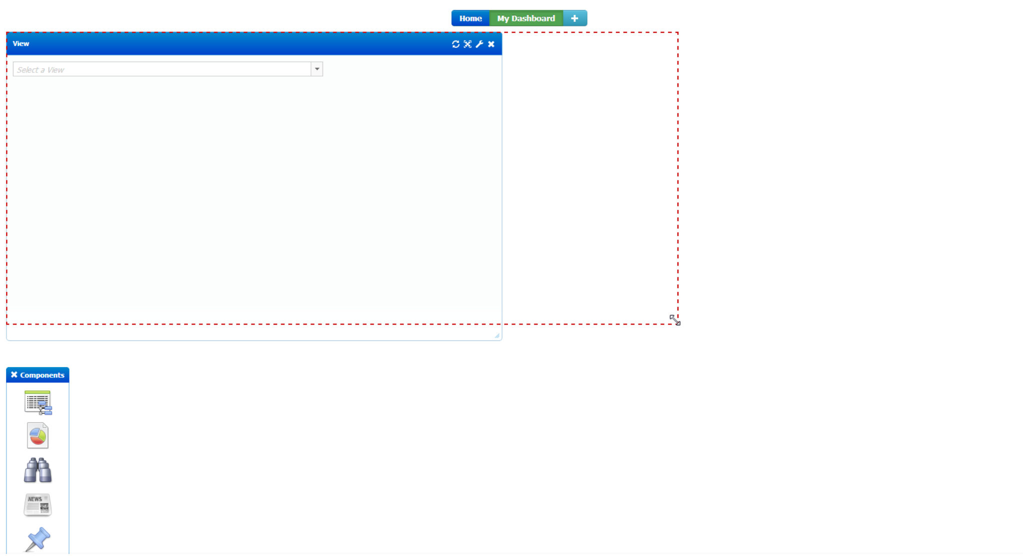


5. Click the **Views** icon and drag the view onto your dashboard, wherever you like.



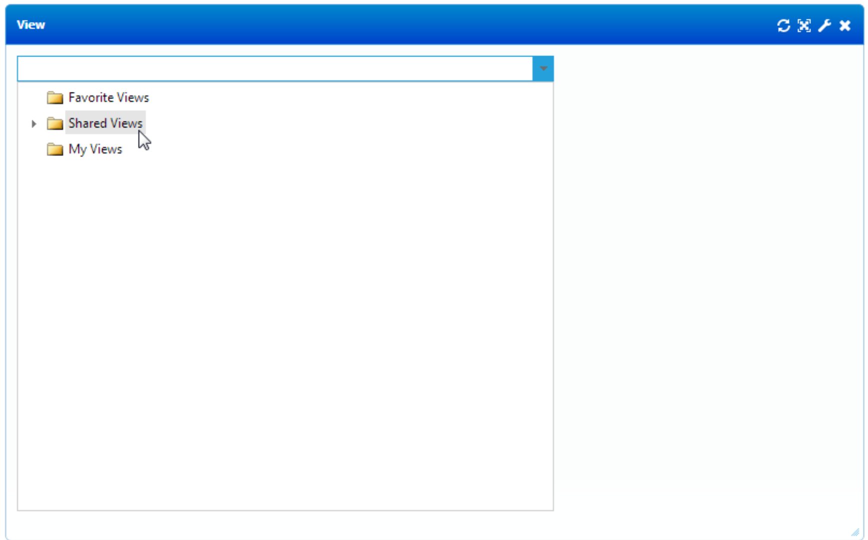
The View is now part of the dashboard. However, it doesn't fit the dashboard well yet.

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



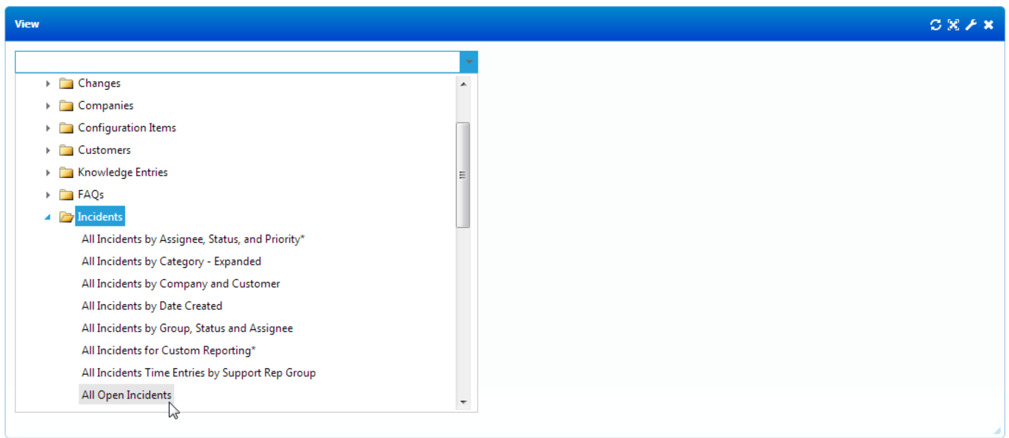
Now the View is placed and sized the way I prefer. But it still contains no data.

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



The Shared Views menu expands.

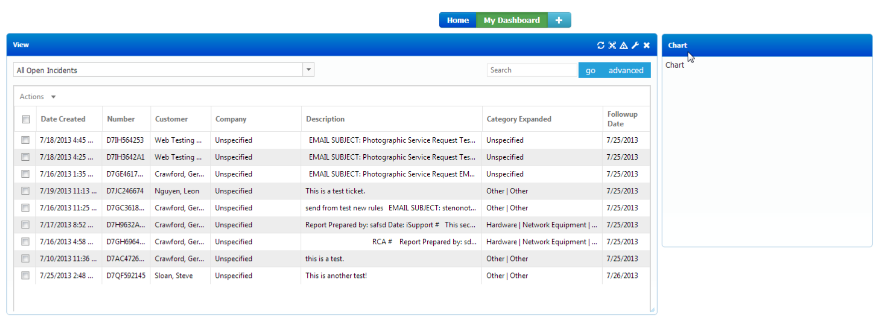
9. Select **Incidents**
10. Select **All Open Incidents**



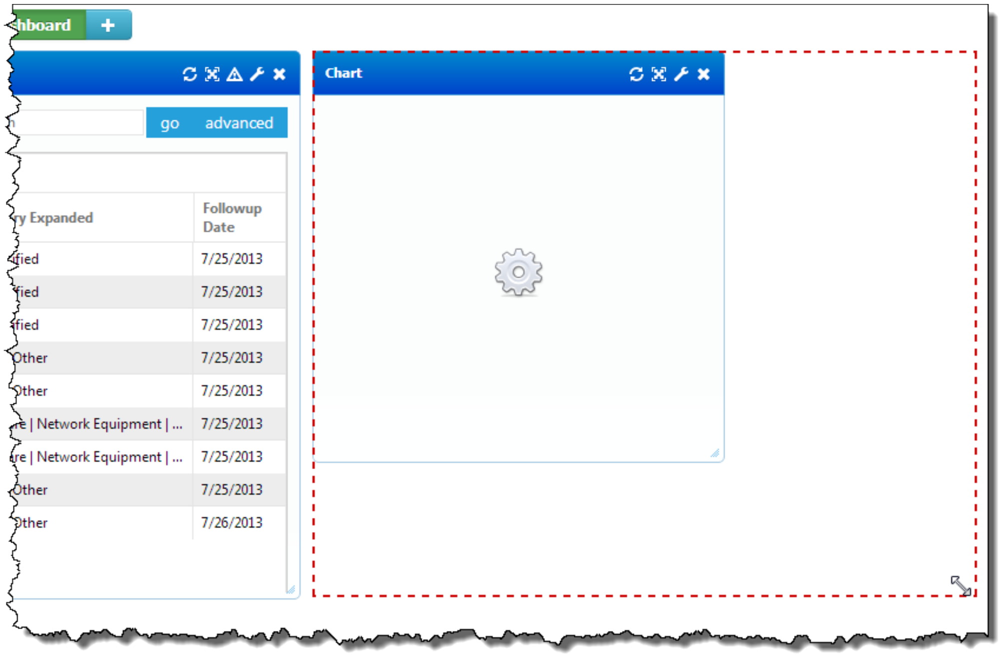
The Dashboard updates with your new View.

Now let's add a chart to the dashboard.

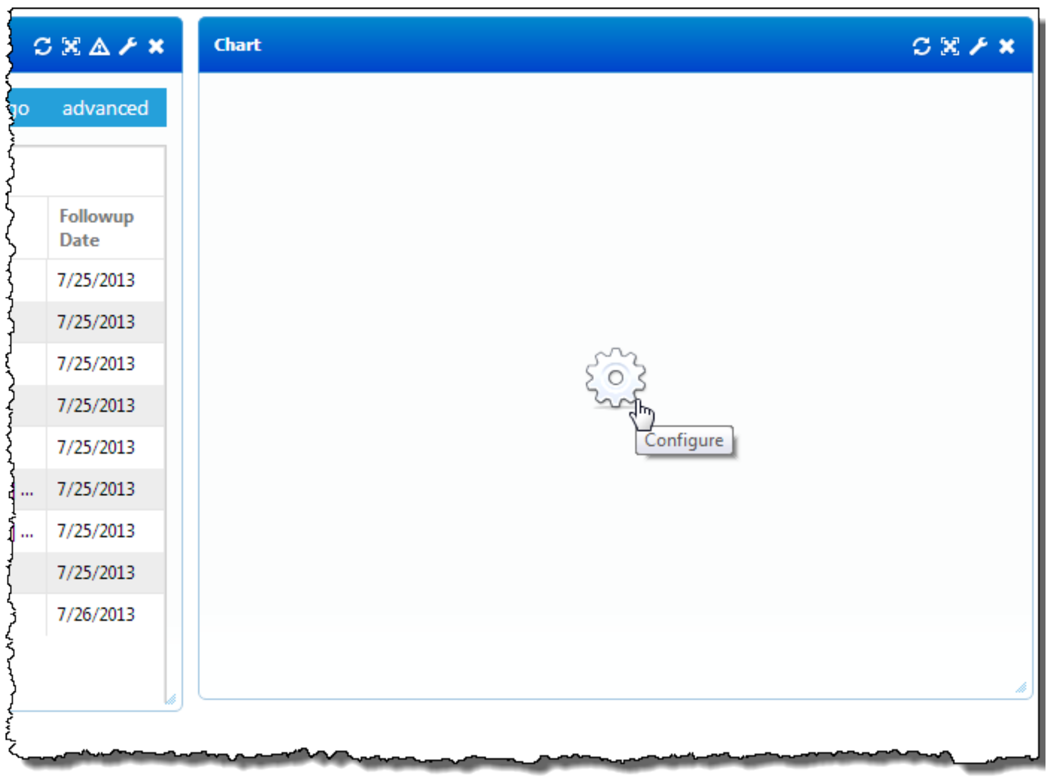
11. Click the **Charts** icon and drag the chart into place on your dashboard.



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

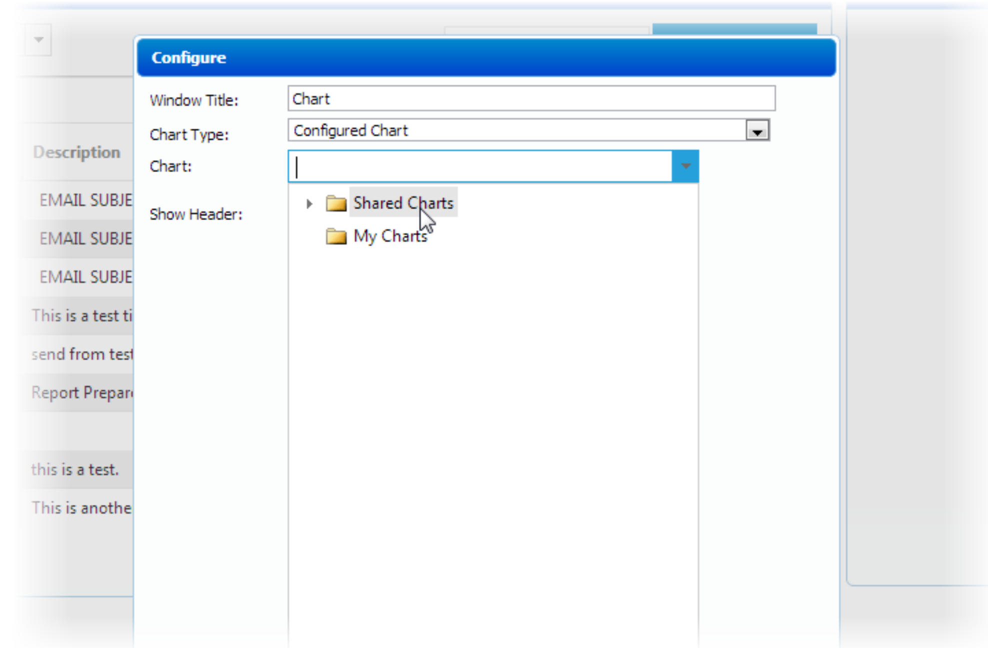


13. Click the **Configure** (gear) icon to choose the chart you want.



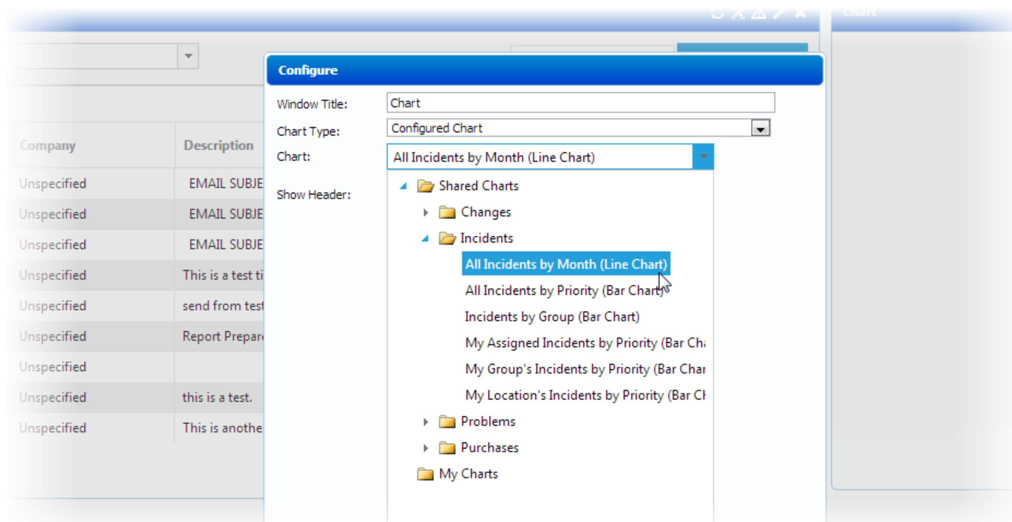
The Configure dialog box displays.

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



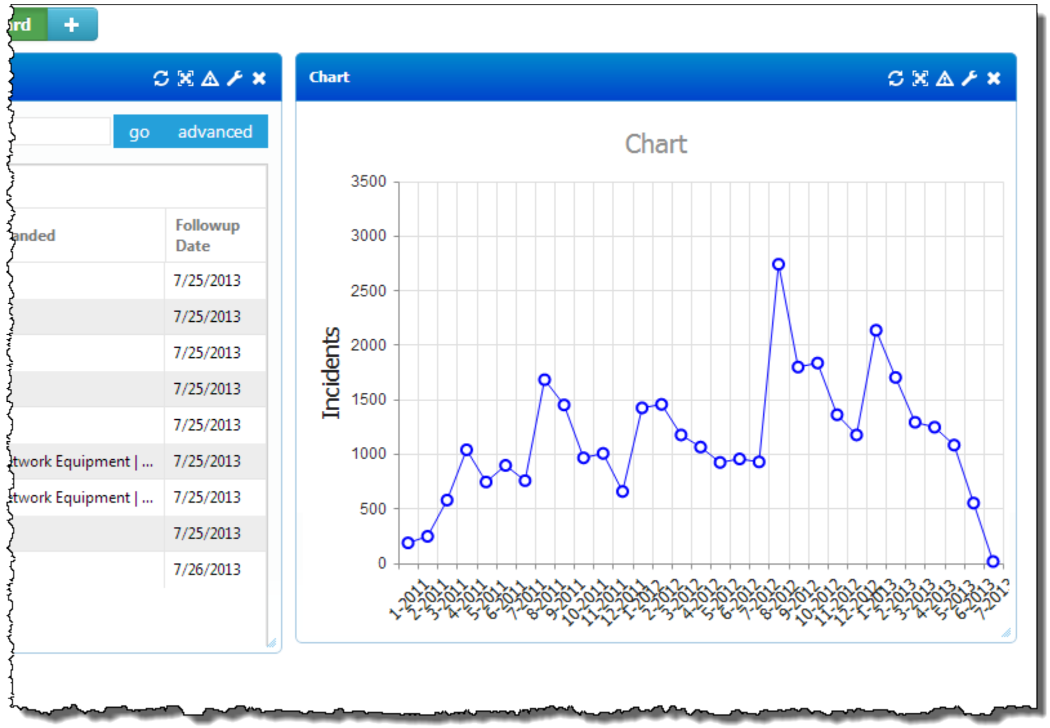
The Shared Charts menu expands.

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

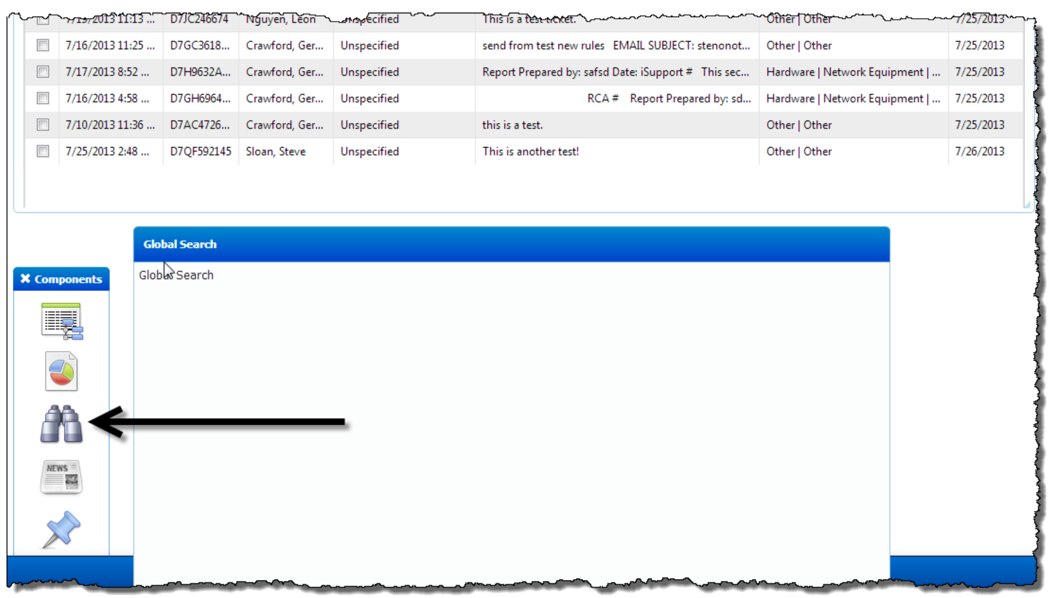


The Dashboard updates with the new Chart.

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



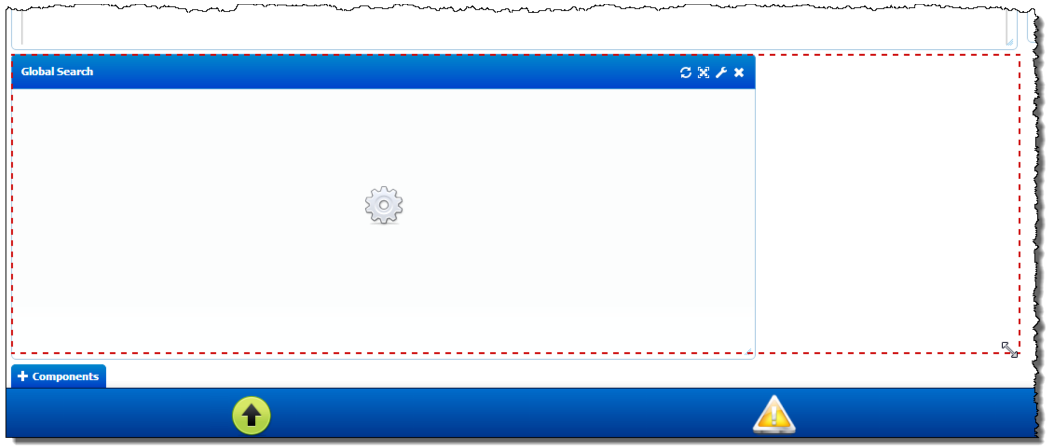
19. Click the **Global Search** icon in the **Components Menu** and drag it to your dashboard.



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.

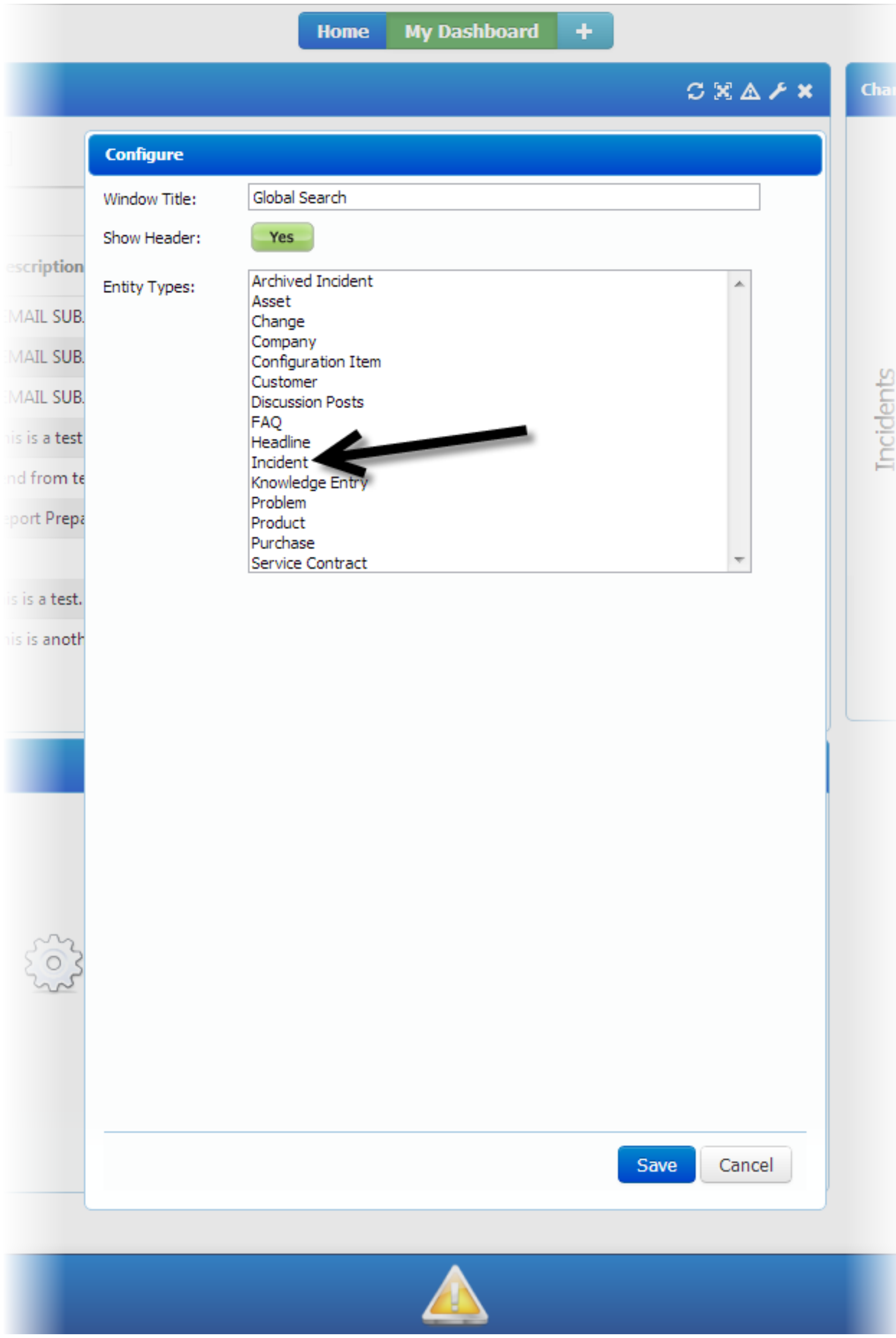
21. Click the **Configure** (gear) icon to select your Global Search.



The Configure menu displays.

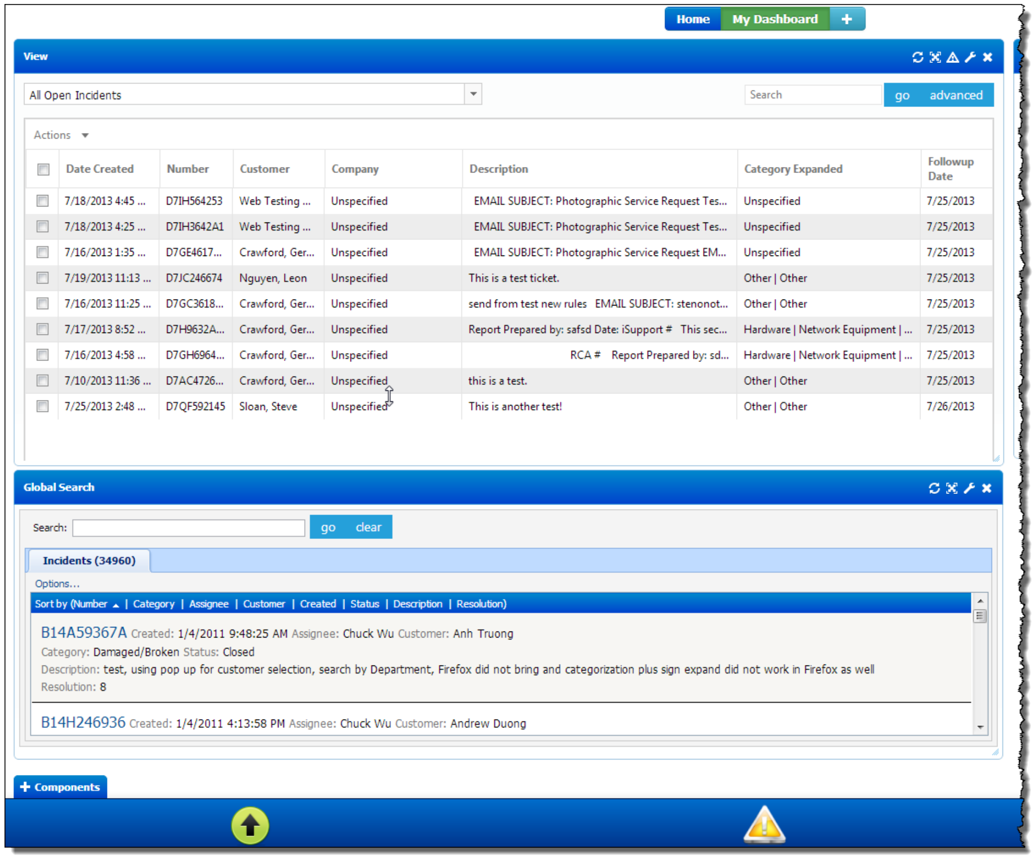
22. Select **Incident**.

23. Click **Save**.

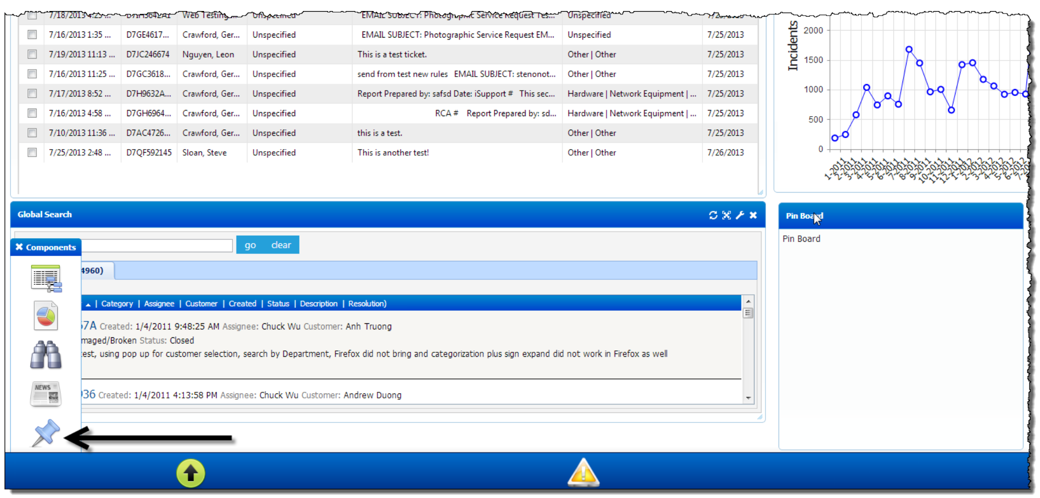


Your dashboard updates with the new Global Search.

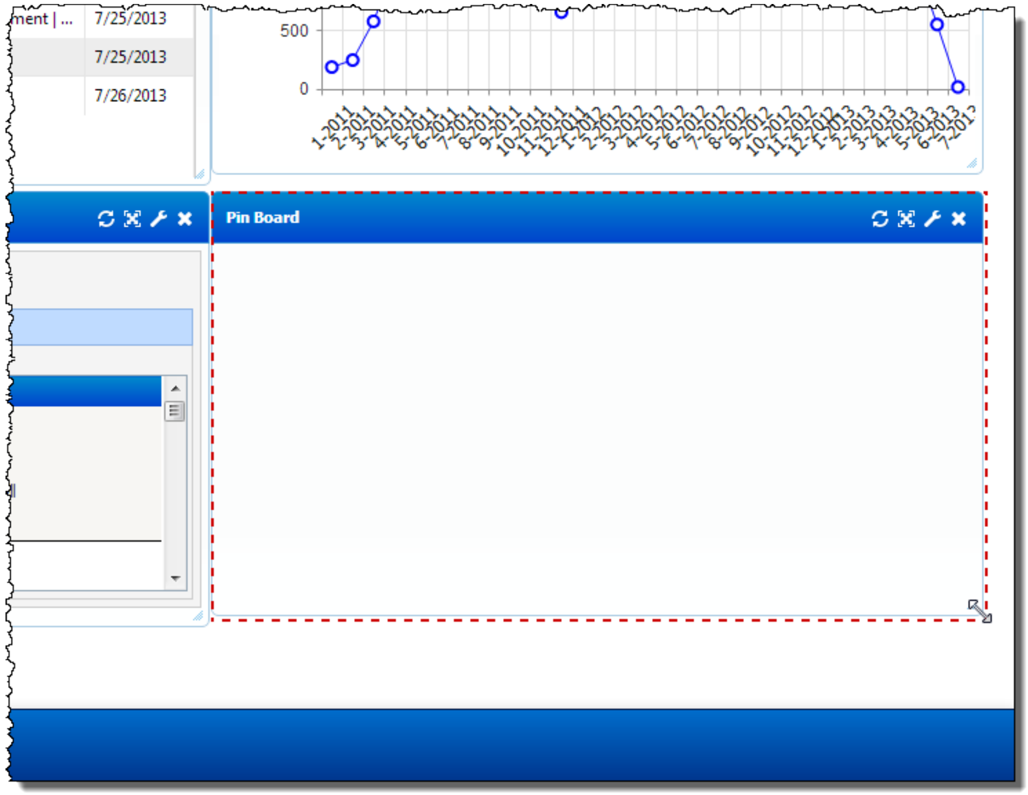
NOTE: Global Search slows down the refresh rate of your dashboard, meaning it may take several seconds for your data to appear.



24. If you have closed your **Components Menu**, reopen it.
25. Click the **Pin Board** icon and drag to your desktop.



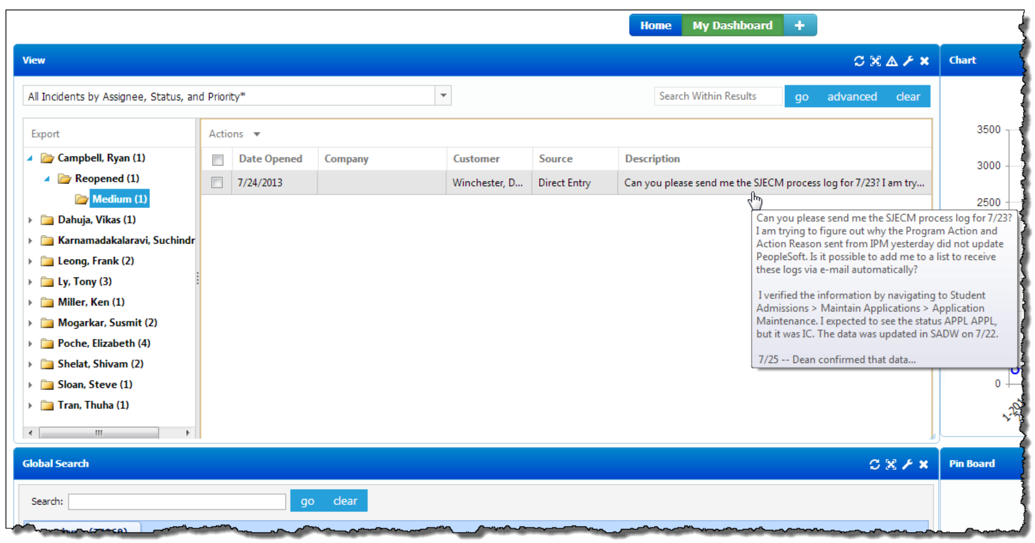
26. Drag the edges of the window until it is sized to your preference.



The Dashboard now shows your Pin Board.

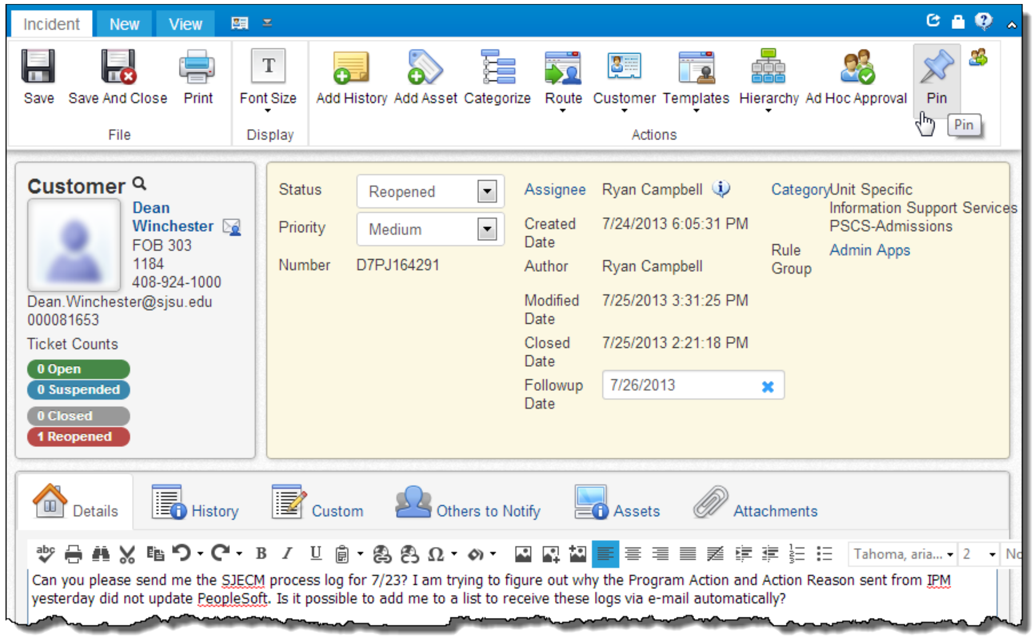
By default, the Pin Board contains no data. Incidents can be manually attached to your Pin Board.

27. Select an incident you want to track.



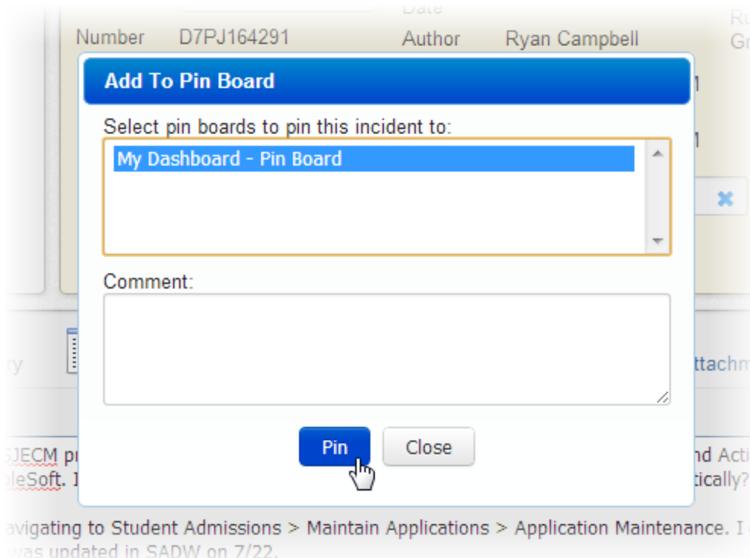
The Incident window displays.

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



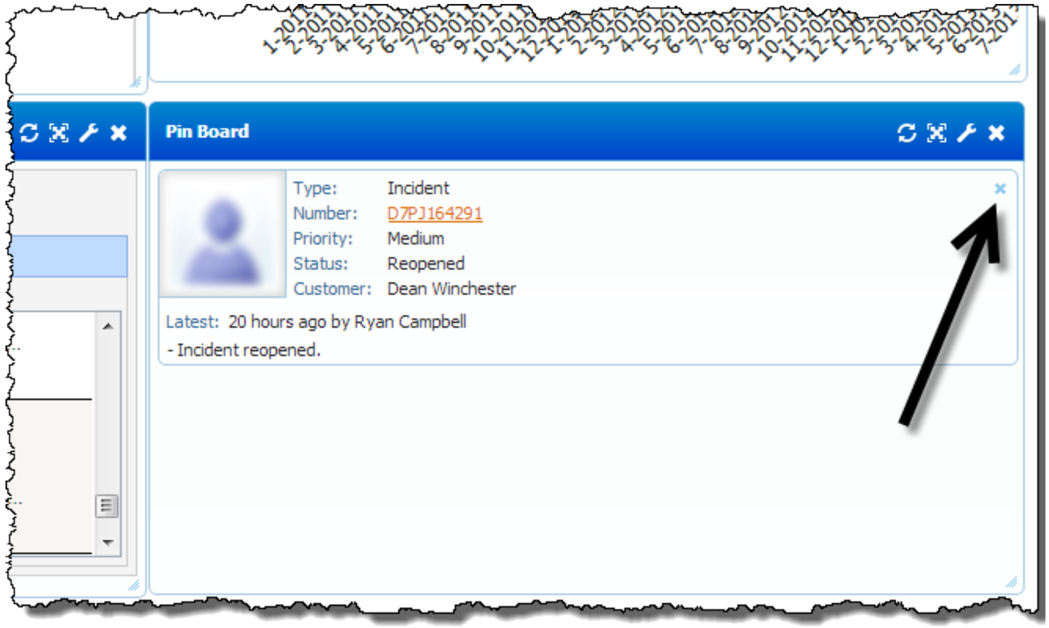
The Add To Pin Board dialog box displays.

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



The pinned incident appears in your Pin Board.

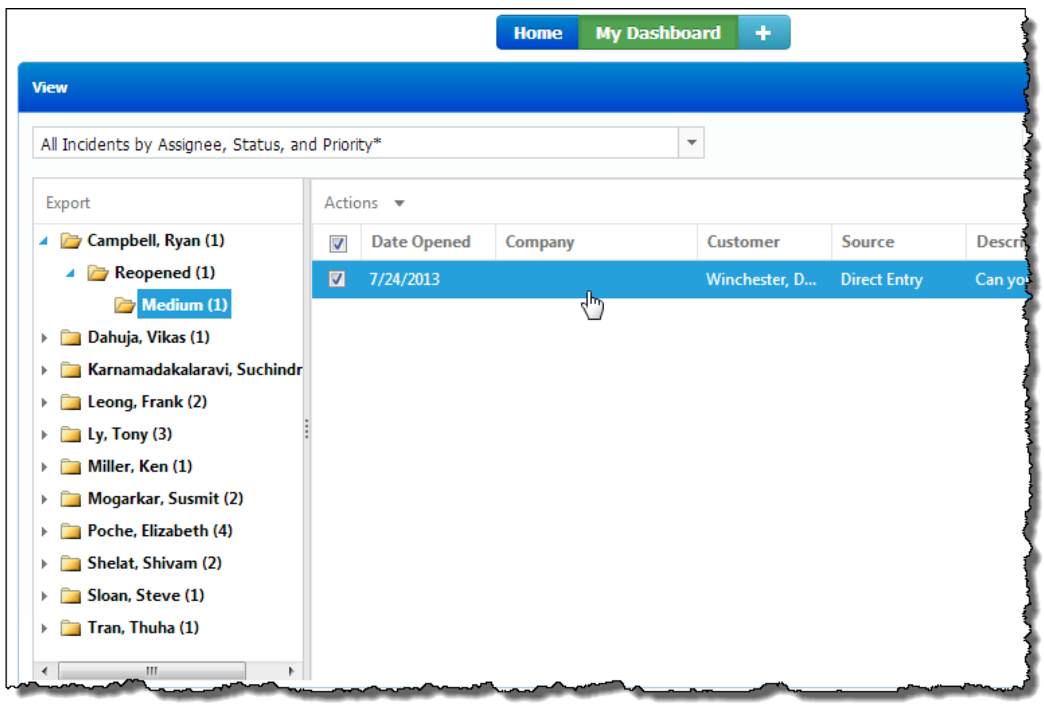
You can click the **X** at any time to remove an incident from your Pin Board.



Adding a Quick Access icon to a Page

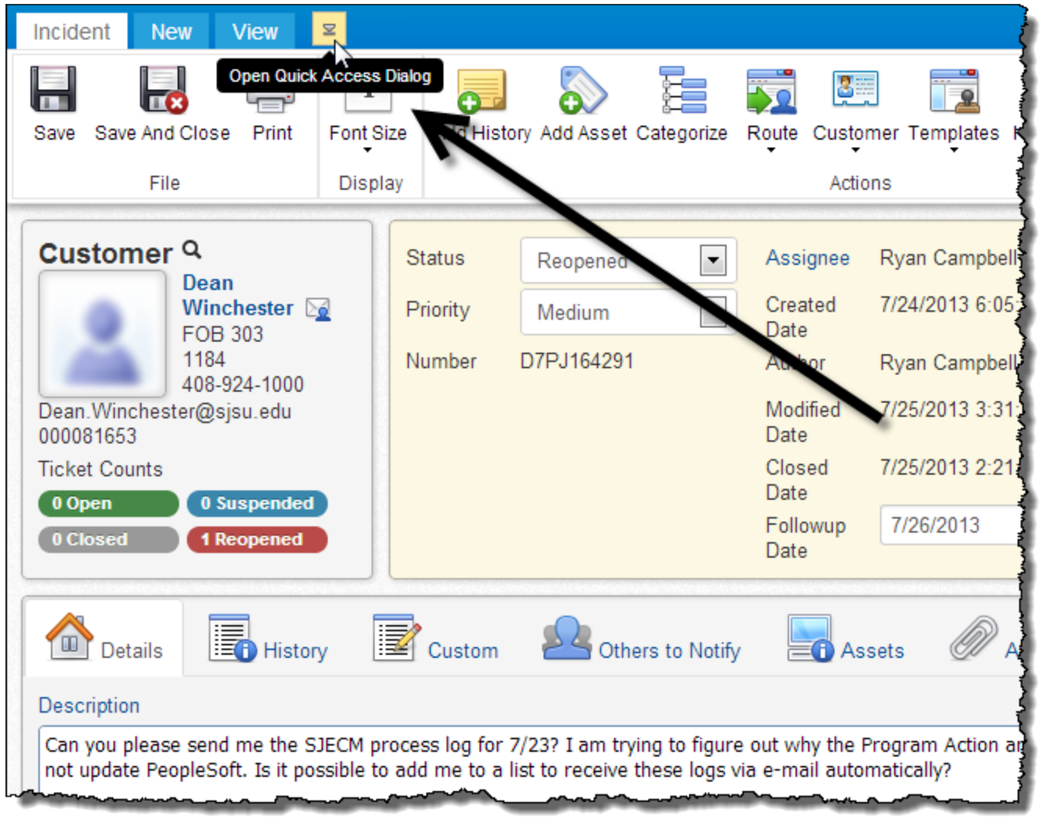
Within individual pages in iSupport, you can add Quick Access icons to features that you use frequently. In the example below, we will add a Create New Customer icon to the Incident page.

1. Open any incident in iSupport.



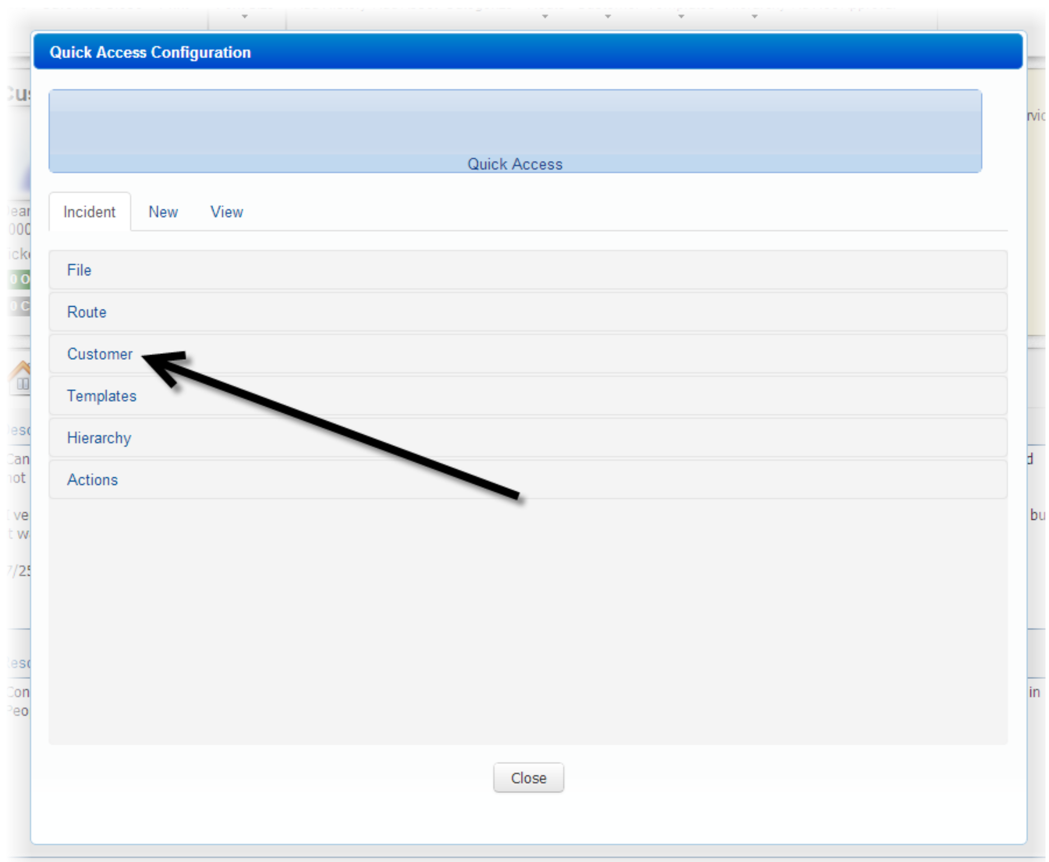
The Incident window displays.

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



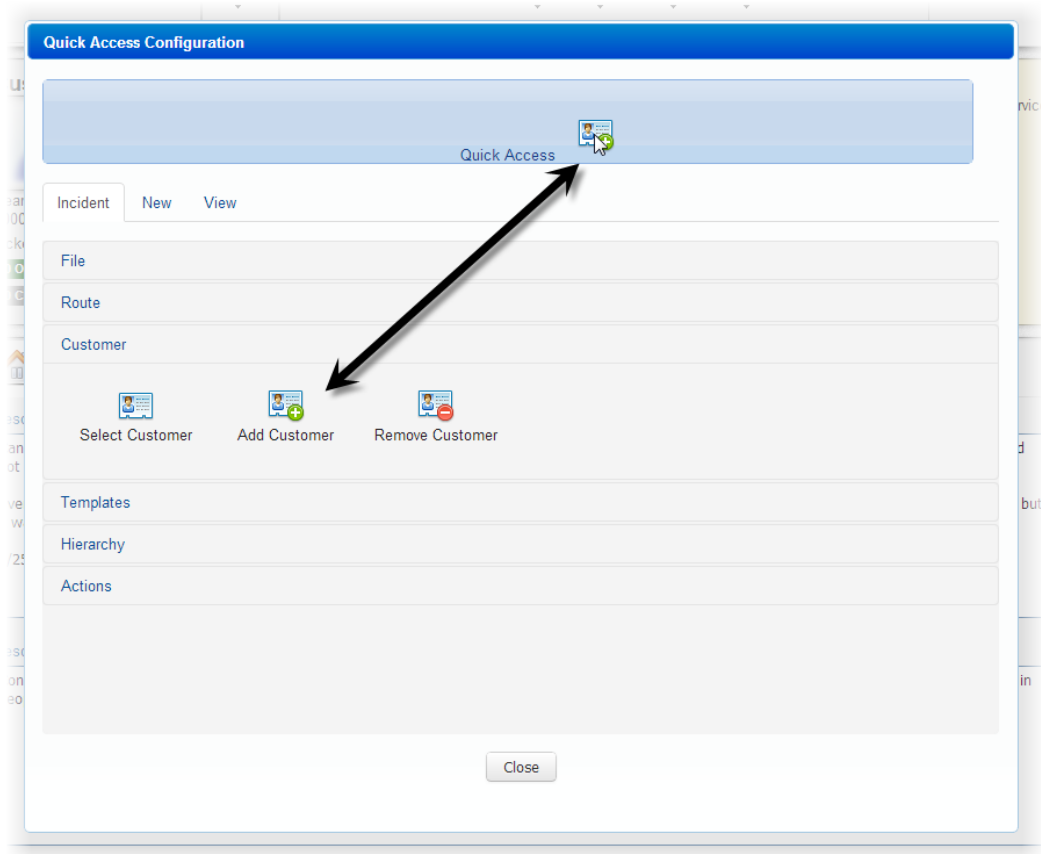
The Quick Access Configuration dialog box displays.

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



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.