AssistMyTeam Helpdesk for Outlook

Help Manual for Agents

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Welcome

A helpdesk system integrated seamlessly within your Microsoft Office Outlook, transforming it from a simple email client to a fully-fledged service provider.

This is an elaborate help documentation that will guide agents on how to install, configure, and work with support cases in Outlook. Graphic illustration and screenshots of the screen/forms are used with proper marking wherever they are required to drive down the point of the relevant topic.

1. Helpdesk that is designed for Outlook

The AssistMyTeam Helpdesk is an issue tracking and ticketing system that is available as an add-on for Microsoft Outlook. Integrated seamlessly within your Microsoft Outlook, it transforms Outlook from a simple email client to a fully-fledged service provider. Using your inhouse Microsoft SQL Server or cloud Azure SQL as repository for storing support cases, it provides support staffs with all the necessary tools to log, collaborate, analyze and assist in the resolution of help desk issues. Various medium of communication supports automated messaging and notification requiring no human inputs, making it possible to integrate customer relationship management (CRM) processes in core help desk functionalities

With inbuilt support for advanced statistics and varied reporting options, support managers can evaluate the performance of the helpdesk and in-turn ensures timely decision making for improved service.

To sum up, AssistMyTeam Helpdesk improves the efficiency of the help desk to enable faster response time and higher productivity for your organization at lower operating costs. After all, the bottom line for your help desk team is for your end-users to receive better and timely service.

Benefits for your organization:

- Work on cases in your Outlook as if you would work on emails
- Single enterprise-wide view of support cases, callers, problems and resolutions
- Little or no training requirement on the part of your support agents
- Centralized data storage on Microsoft SQL Server or Azure - efficient platform for collaboration
- Enable integration with Active Directory
- Common point-of-call for your callers
- Structured workflow for all helpdesk activity
- Freeing up valuable human resources by automating cases logging, sending notifications etc.
- Higher productivity and increased "up-time" for support staffs
- Organized state of cases means faster tracking requests
- Identify problem areas and increase helpdesk efficiency
- ‘Do more with less’ - affordable one-time fee with enterprise-wide license

Benefits for your customers:

- Always in communication loop via the power and ease of automated email/messaging
- Inspires confidence to the help desk service
- A knowledge base that can be searched through for resolution
- Check on the progress or status of the case via web
- Request support in a standardized way through email
- Case gets resolved in a timely manner and hence customer satisfaction
- Helps in building trust and loyalty in your brand

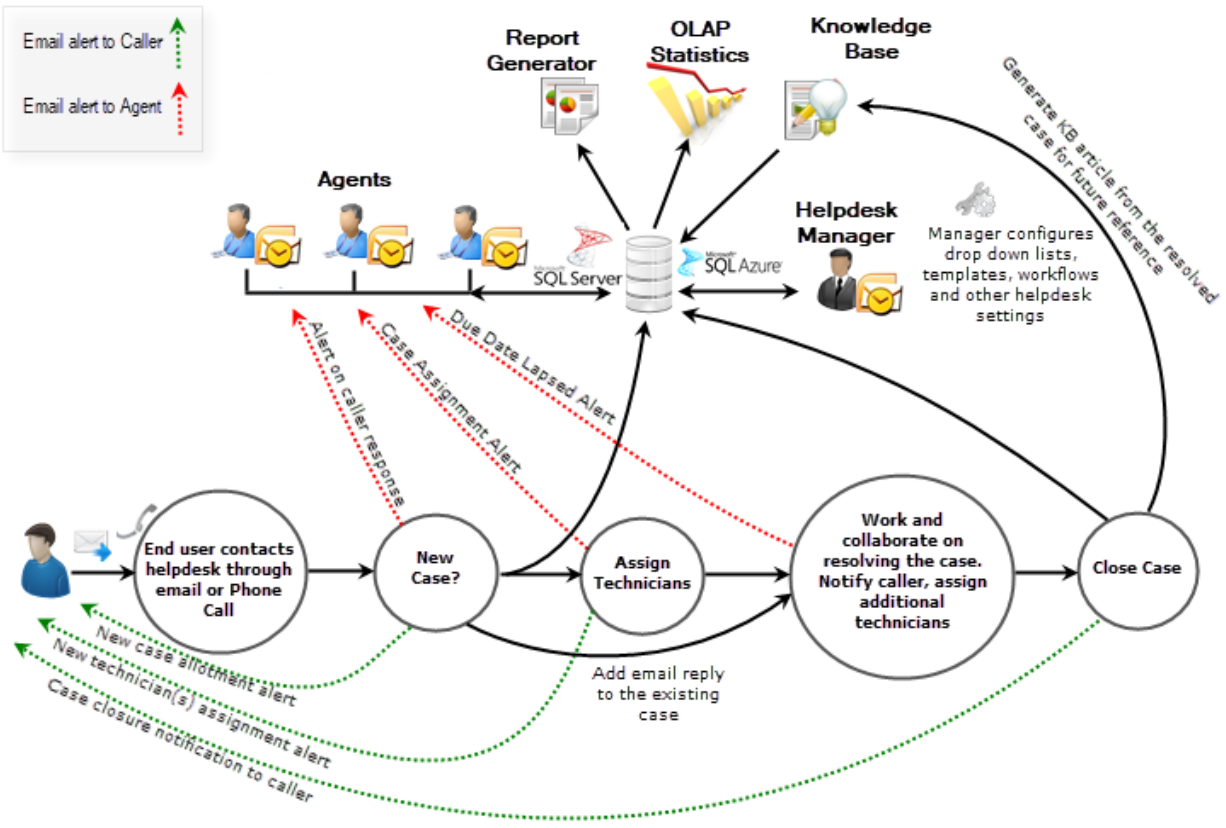
2. How It Works?

AssistMyTeam Helpdesk System consists of two separate installs – **Managerial** and **Agent**.

- The Managerial install is for **helpdesk administrator** who would configure and maintain the global configurations, drop down lists, templates etc. in the helpdesk SQL database.

- The Agent install is for the **technicians** to enable them to log, raise and work on support cases in Outlook.

Each of this tool is installed on individual computer as an extension to Microsoft Outlook and only relies on Microsoft Outlook for the front-end and a network SQL or cloud Azure database, as the back-ends.



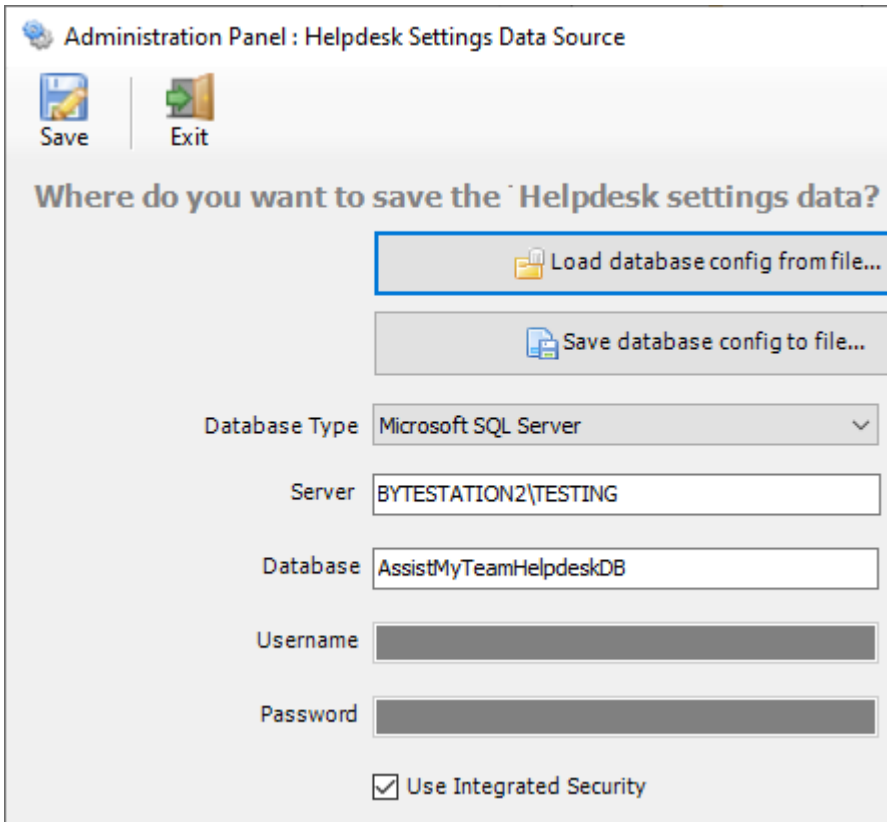
AssistMyTeam Helpdesk Add-in

Step 1

<u>Manager creates a central helpdesk database</u>

After the managerial tool is installed, helpdesk administrator will be given a choice of database options where all the cases, articles, templates and other settings data will be stored centrally.

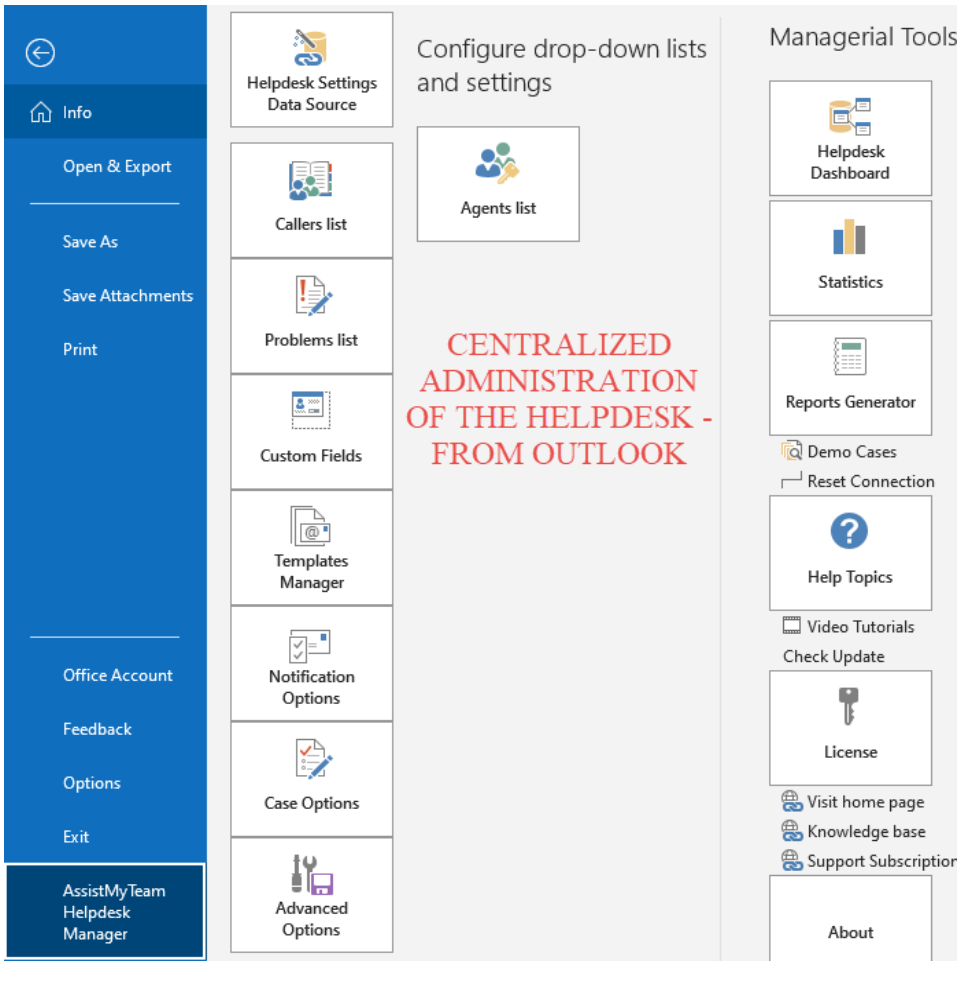
Database options include Microsoft SQL Server, Microsoft Azure (cloud SQL server).



Step 2

Manager configures helpdesk settings and drop downs

Helpdesk administrator defines drop-down lists such as agents, callers, problems as well as emails templates, messaging options etc. With these global settings, manager can streamline the behavior on how all agents work on support cases in Outlook.



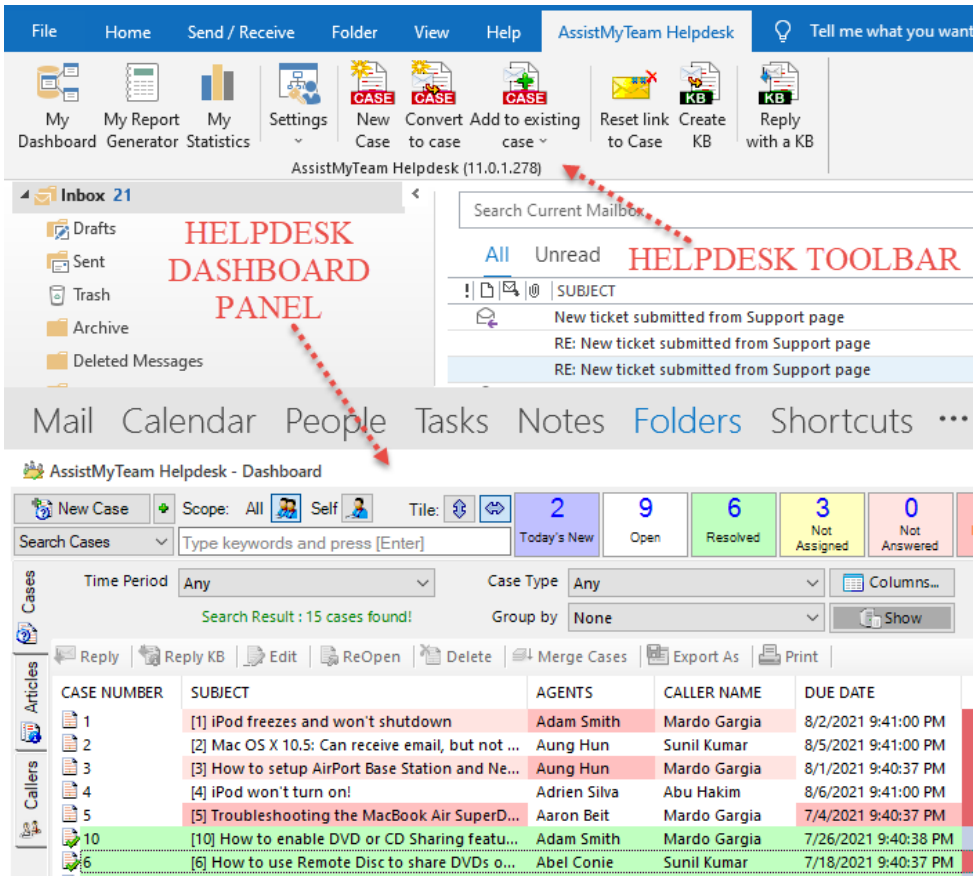
Step 3

Technician installs Agent add-in

The Agent tool consists of an Outlook add-in that has all the logic and functionalities of the helpdesk application. Each agent of the helpdesk who would work on cases needs to install the Helpdesk Agent tool.

After a successful install, you will see that dashboard panel, toolbars or ribbons are added in the explorer and inspector windows of Microsoft Outlook.

Note: Apart from the managerial tool, helpdesk administrators also need to install the Agent tool if they have to work on support cases themselves.



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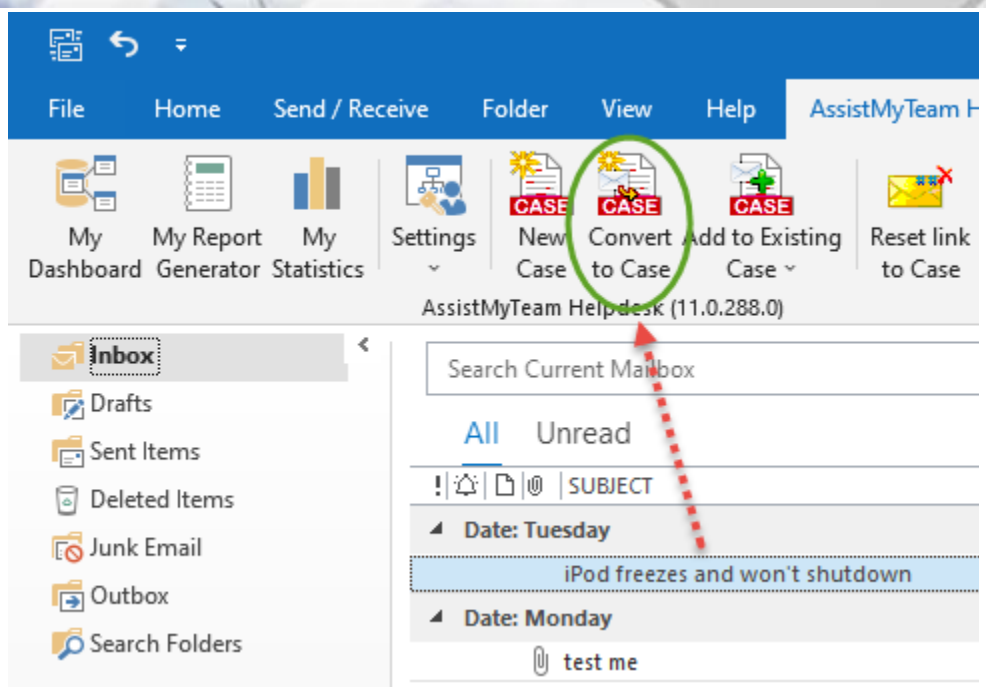
AssistMyTeam

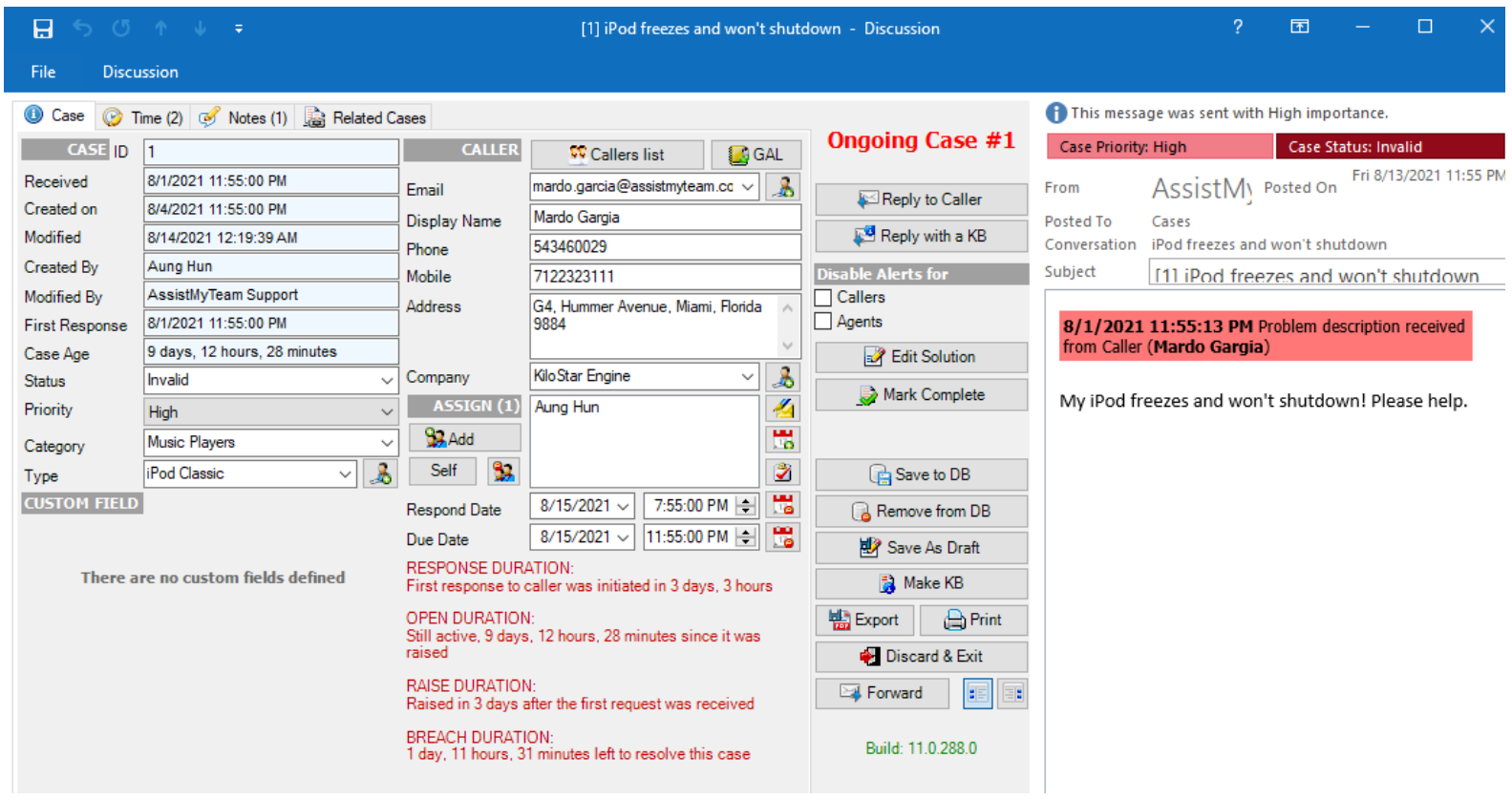
Step 4

Caller submits support request via email or phone call

An end-user experiencing technical challenges contact helpdesk requesting for support by sending an email or by making a phone call. These support requests are then logged and converted to cases in Outlook.

Further details and drop-down lists (such as the classification of problems the request falls into) can then be set, by a supervisor or manager.





Step 5

Assign agents to the case

Typically, a manager assigns the best agents to the case for fulfillment of the service and speedy resolution.

Furthermore, in the helpdesk settings, administrator can link and associate individual agent to a caller, or to a problem type such that when a new support request email is received, if there is a match between agent and the caller (read as sender), or if a problem type is found in the email subject, the associated agents will get assigned automatically to the case.

Assigned agents then get notified through an automated email. Optionally, the due date of the case is entered into the personal calendar of the agent's mailbox.

Step 6

Agents collaborate to resolve the case

The assigned agents then proceed to fulfill and resolve the case in Outlook. Helpdesk manager may set due date and other deliverables on the particular case for the assigned agents, for quality check purposes. Further correspondence to the caller might follow (in the form of emails, phone calls). All activities related to the case are logged and agents can fill time spent and assign additional agents if needed. All email conversations and notes can be accessed and tracked right from the case form itself, without the need to scan through your Inboxes for past replies.

Step 7

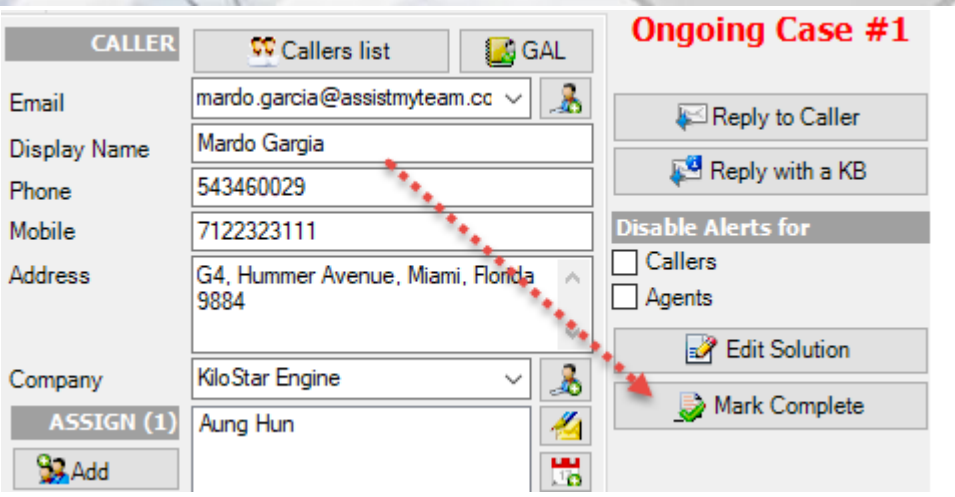
Caller follows-up via email

The caller can reply back to email from the helpdesk and the response automatically triggers an escalation on that particular support case. If a response from the caller on an existing case is received, the assigned agents are notified automatically. If the case has been resolved, AssistMyTeam Helpdesk automatically re-opens and marks it as an ongoing case.

Step 8

Agent closes case after providing a resolution

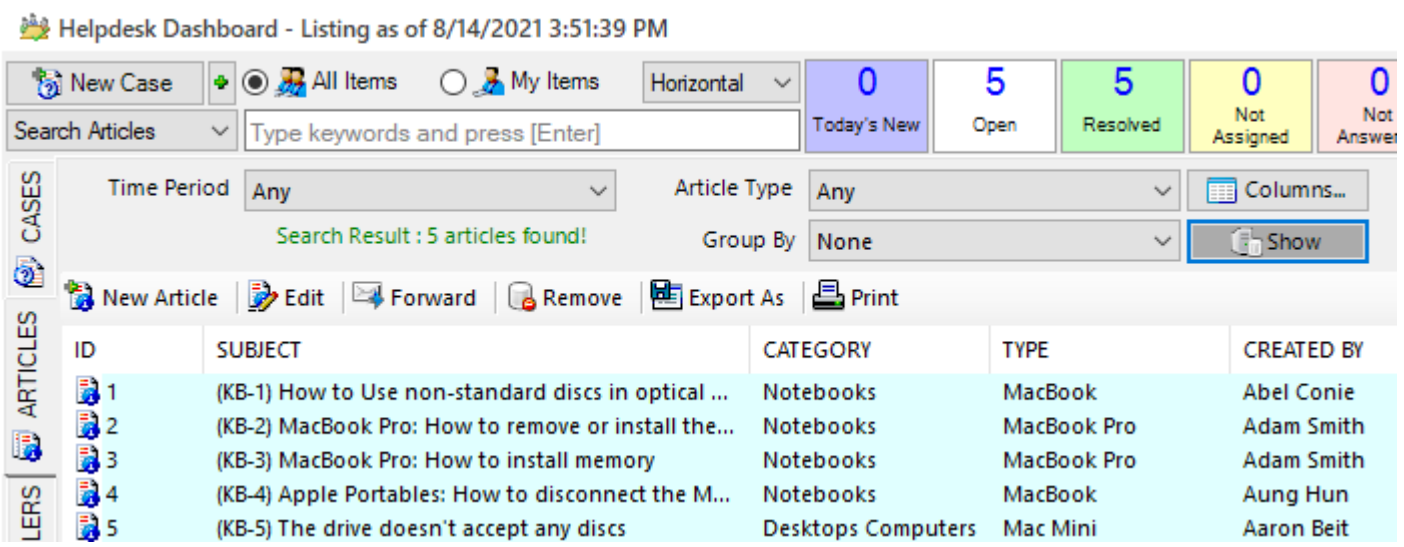
Once every parameter of the caller's request has been fulfilled, a case be closed. At the same time, the caller gets notified automatically on the closure of the case.



Step 9

Agent adds resolution to knowledge base

A closed case can be a good source of future reference and agent can create a new knowledge base entry based on the case. It is then available in the list of articles under the integrated knowledge base, categorized and sorted, ready for your agents to draw from when similar issues arise. Additionally, helpdesk administrator can choose to publish these articles to their website or intranet to provide first level support to potential support requests from end-users.

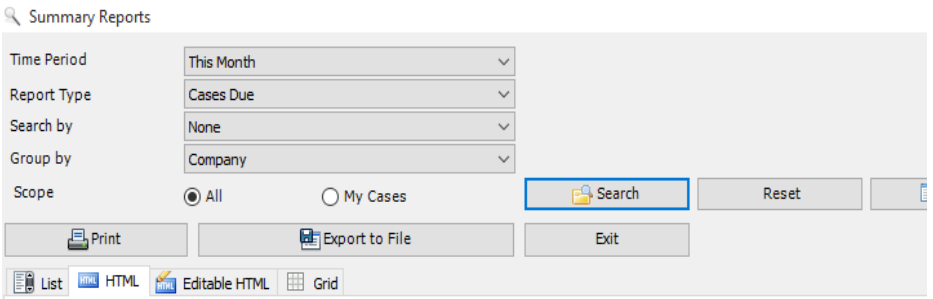


Step 10

Manager generates statistical and trend reports

To identify problem areas and increase helpdesk efficiency, senior management runs the statistical tool from time to time, collecting valuable intelligence and trends and generating meaningful reports.

For day to day knowledge of the helpdesk, they can generate summary reports to get appraisal on the current happenings on the helpdesk and track recent cases generated, worked, closed or reopened.



Report

Generated by : **AssistMyTeam Support**
Time : **1/18/2017 12:08:07 AM**

*Cases Due : This Month [1/1/2017 to 1/18/2017] - **28 Cases***

Subject	Case Number	Caller Name	Raise Duration	Open Duration	Breach Duration	Status
Company: Angel Heart Hospital (3)						
[37] iPod won't turn on!	37	Reiter Ask	5 days	2 days 23 hrs 29 mins	0 mins	Frozen
[38] How to use Remote Disc to share DVDs or CDs on a Mac	38	Mayer County	3 days	2 days 23 hrs 29 mins	1 day 23 hrs 30 mins	Invalid
[54] How to Use non-standard discs in optical drives	54	Durand Pi	22 days	2 days 23 hrs 29 mins	17 hrs 10 mins	Frozen
Company: DSFF Gyms (3)						
[41] Mac OS X 10.5: Can receive email, but not send email	41	Rodriguez Jes	6 days	2 days 23 hrs 29 mins	0 mins	Delayed
[44] iPod won't turn on!	44	Fenech Fo	14 days	2 days 23 hrs 29 mins	8 mins	Processing
[99] MacBook Pro: How to install memory	99	Jacobs Jab	2 days	6 hrs 49 mins	6 hrs 50 mins	Invalid
Company: KiloStar Engine (4)						
New Download: Attachment Manager for Outlook		info@assistmyt	1 day 16 hrs 27	10 days 5 hrs 23 mins	11 days 6 hrs 22 mins	
[45] Troubleshooting the MacBook Air SuperDrive	45	Kovács Serbia	9 days	2 days 23 hrs 29 mins	0 mins	Processing
[48] MacBook Pro: How to remove or install the battery	48	Kovács Serbia	8 days	2 days 23 hrs 29 mins	1 day 23 hrs 30 mins	Deferred
[51] Troubleshooting the MacBook Air SuperDrive 55555	51	Lefebvre Frenc	19 days	2 days 23 hrs 29 mins	0 mins	Processing
Company: Michellin Fashion (6)						
[29] How to use Remote Disc to share DVDs or CDs on a Mac	29	Koch Crimea	5 days	2 days 23 hrs 29 mins	1 day 23 hrs 30 mins	Delayed
[34] How to use Remote Disc to share DVDs or CDs on a Mac	34	Colombo Sri	4 days	2 days 23 hrs 29 mins	1 day 23 hrs 30 mins	Invalid
[39] Troubleshooting the MacBook Air SuperDrive	39	Virtanen Singh	15 days	2 days 23 hrs 29 mins	0 mins	Frozen

3. Requirements

AssistMyTeam Helpdesk is available right inside your Outlook unlike any other standalone application and web-based help desk software. It can be easily deployed through an installer (manually or via a group policy object with MSI) across the entire organization.

Please make sure that your system meets the following requirements before installing AssistMyTeam Helpdesk for Outlook:

Windows Version	Windows Vista, 7, 8, 8.1, 10, 11. Both 32-bit and 64-bit OS are supported.
Outlook Version	Outlook 2019, 2016, 2013, 2010. AssistMyTeam Helpdesk operates directly inside the Microsoft Outlook application (using Microsoft's "COM add-in" technology). Outlook Express is not supported.
Database	All versions and editions (including Express edition) of **SQL Server** are supported including cloud services such as **Amazon RDS** and **Microsoft Azure SQL**.
.NET Framework	Microsoft .NET Framework 4.6.1

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4. Installation Information

This install is meant for agents and technicians who would be working on support cases from within their Outlook. Before you install the agent tool, make sure the helpdesk SQL database had been already created and configured by your manager, and that you know the database name, your credentials to the SQL server if Windows authentication is not configured (ask your helpdesk manager). This is required because when you start Outlook after installing the Agent add-in, you will be asked to enter the SQL server logon information as well as the database name (if different from the default name '**AssistMyTeamHelpdeskDB**').

Download link: SETUPS

There are two different setup types:

For **'Per User Installation'** (ideal for standalone single user/workstation)
AssistMyTeamHelpdeskSetups_x86.zip (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
AssistMyTeamHelpdeskSetups_x64.zip (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

For **'Per Machine Installation'** (ideal for installing on Citrix and Terminal Servers)
AssistMyTeamHelpdeskSetups_x86_Citrix.zip (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
AssistMyTeamHelpdeskSetups_x64_Citrix.zip (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

The downloaded zip file contains 3 files: **AssistMyTeamHelpdeskManagerSetup_xXX.exe**, **AssistMyTeamHelpdeskAgentSetup_xXX.exe** and **VersionInfo.txt** where '**xXX**' can be either **x86** (32-bit Outlook) or **x64** (64-bit Outlook)

Extract these file contents to a file folder. It is recommended that you place the setup files on a shared network folder, such that all users can have access to it, and ease the installation and upgrade process.

Per User Installation and **Per Machine Installation**

*In **Per User Installation**, both the Manager and Agent installs are performed 100% on the local system and nothing is installed on your Exchange or Windows Server. Further, this install is intended to serve only the current logged on user of the system/workstation and will be installed under the user's application data folder (instead of Programs Files folder) and no elevated permission is required (This is known as per user installation). So, there won't be a prompt from UAC to allow this install unless you change the install directory to say, Programs Files which will warrant an elevated permission/UAC prompt. If the same system is used by multiple agents, each user needs to install AssistMyTeam Helpdesk add-in on their profile with the default installation folder location.*

***Per Machine Installation:** If you have the need to have a single install that serves all users of the system (i.e., per machine installation, which technically means the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups to perform a per machine installation.*

The Agent setup is of two different types - one each for 32-bit Outlook and 64-bit Outlook

For Per User Installation:
AssistMyTeamHelpdeskAgentSetup_x86.exe (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
AssistMyTeamHelpdeskAgentSetup_x64.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

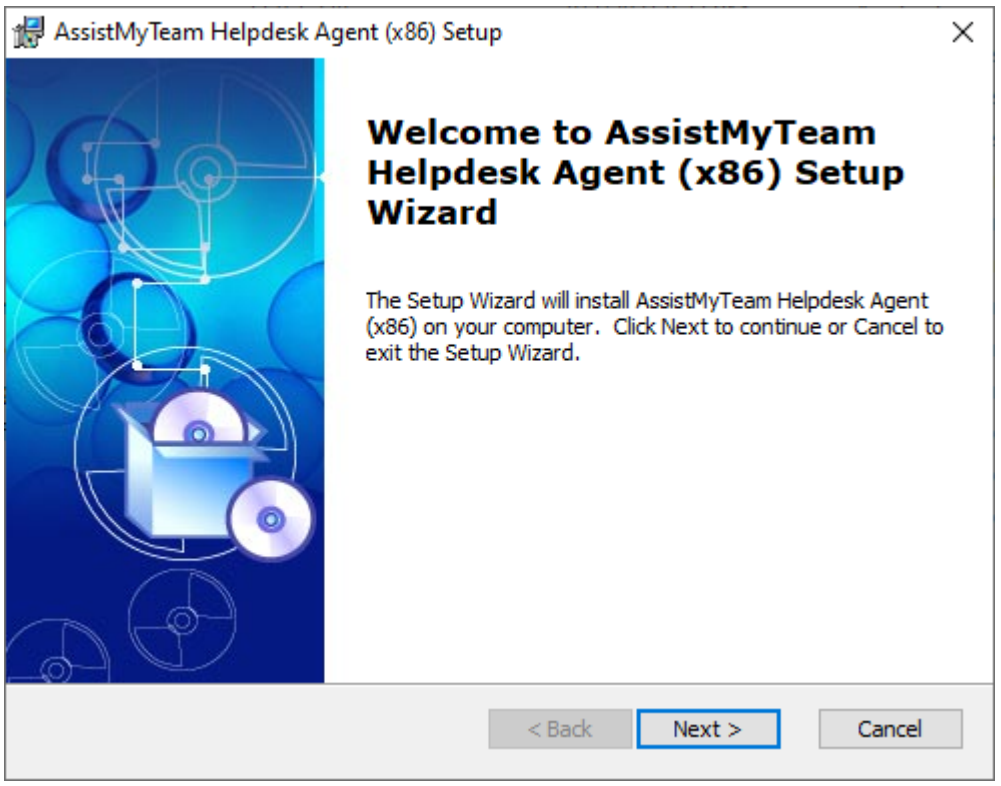
For Per Machine Installation:
AssistMyTeamHelpdeskAgentSetup_x86_Citrix.exe (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
AssistMyTeamHelpdeskAgentSetup_x64_Citrix.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

Note: if the administrator/manager needs to work on support cases, the agent tool also needs to be installed, apart from the managerial portion. It is perfectly normal to have both Manager and Agent add-ins installed on the same machine. However, for normal agents, just the agent add-in is enough to work with the support cases in Outlook.

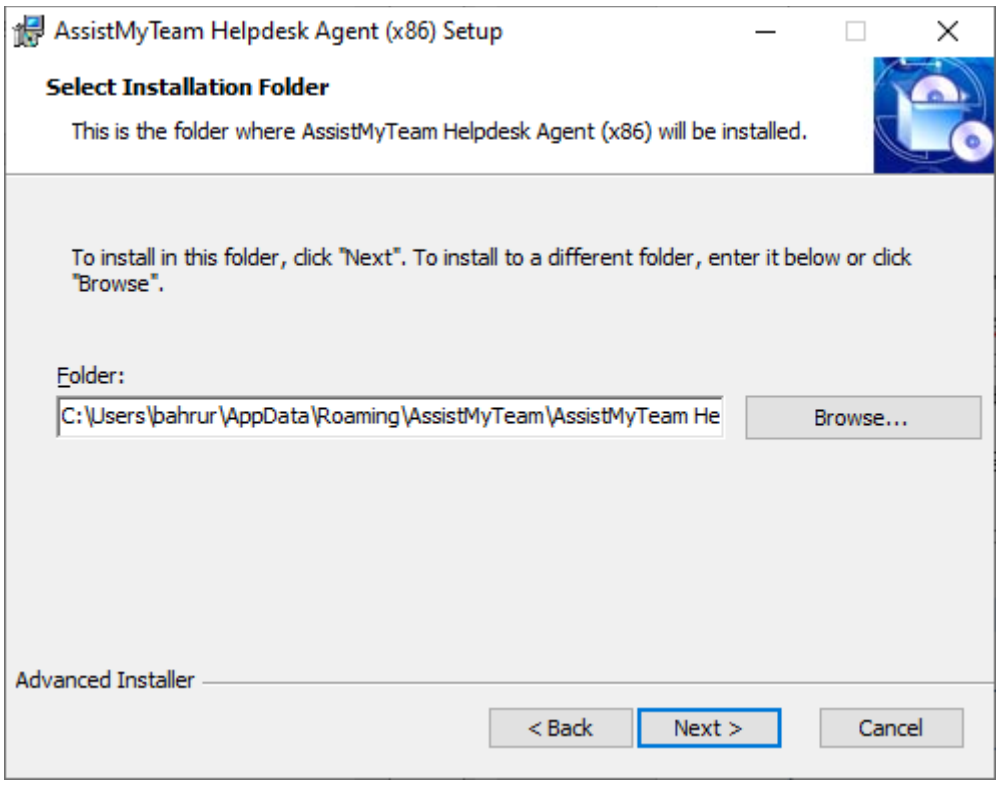
4.1 Installation Steps

The Agent installation mainly consists of an Outlook add-in that has all the logic and functionalities of the helpdesk application. It needs to be installed by all agents who will be working with cases in Outlook. Before you continue the installation, it is recommended that Microsoft Outlook is shutdown (if active).

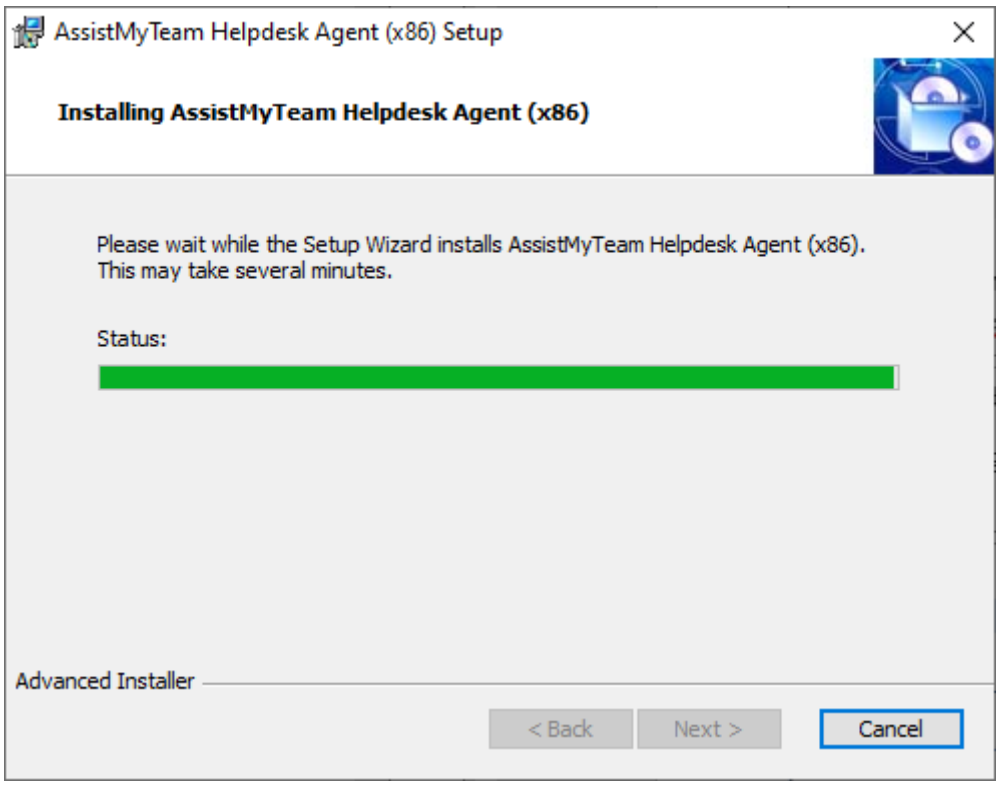
Step 1. Run the **AssistMyTeamHelpdeskAgentSetup_xXX.exe** to start the installation. Click **'Next'** to Continue. If Outlook 2010 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.



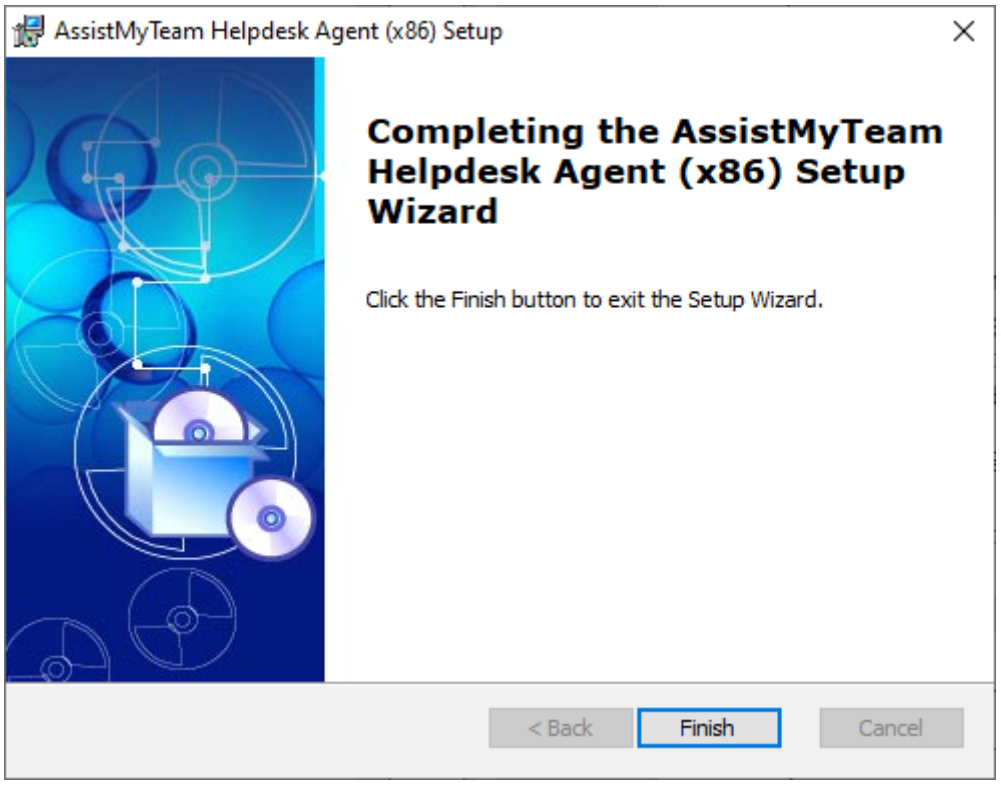
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (**Note**: by default, it will be installed under your application data folder)



Step 3. Click **'Next'** to continue with the files extraction. It just takes a few minutes to complete the whole copying process



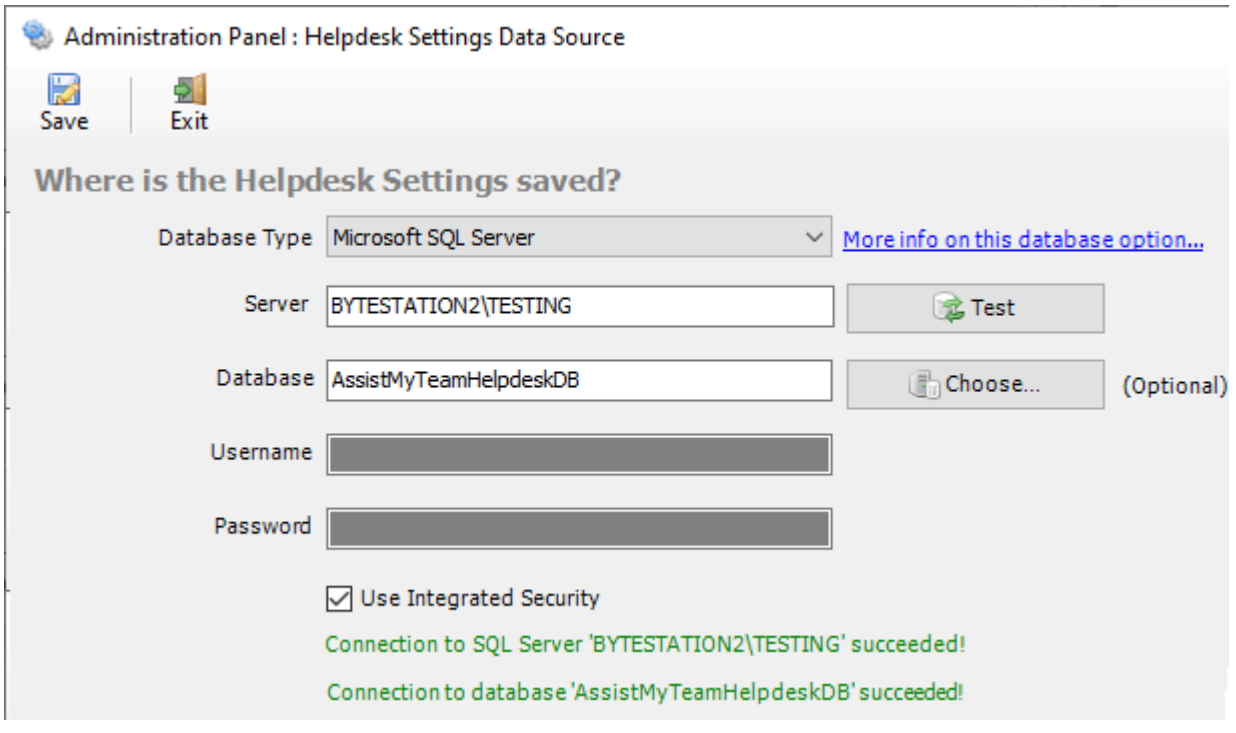
Step 4. Click **'Finish'**. This ends the files installation process in your system. Now start Microsoft Outlook



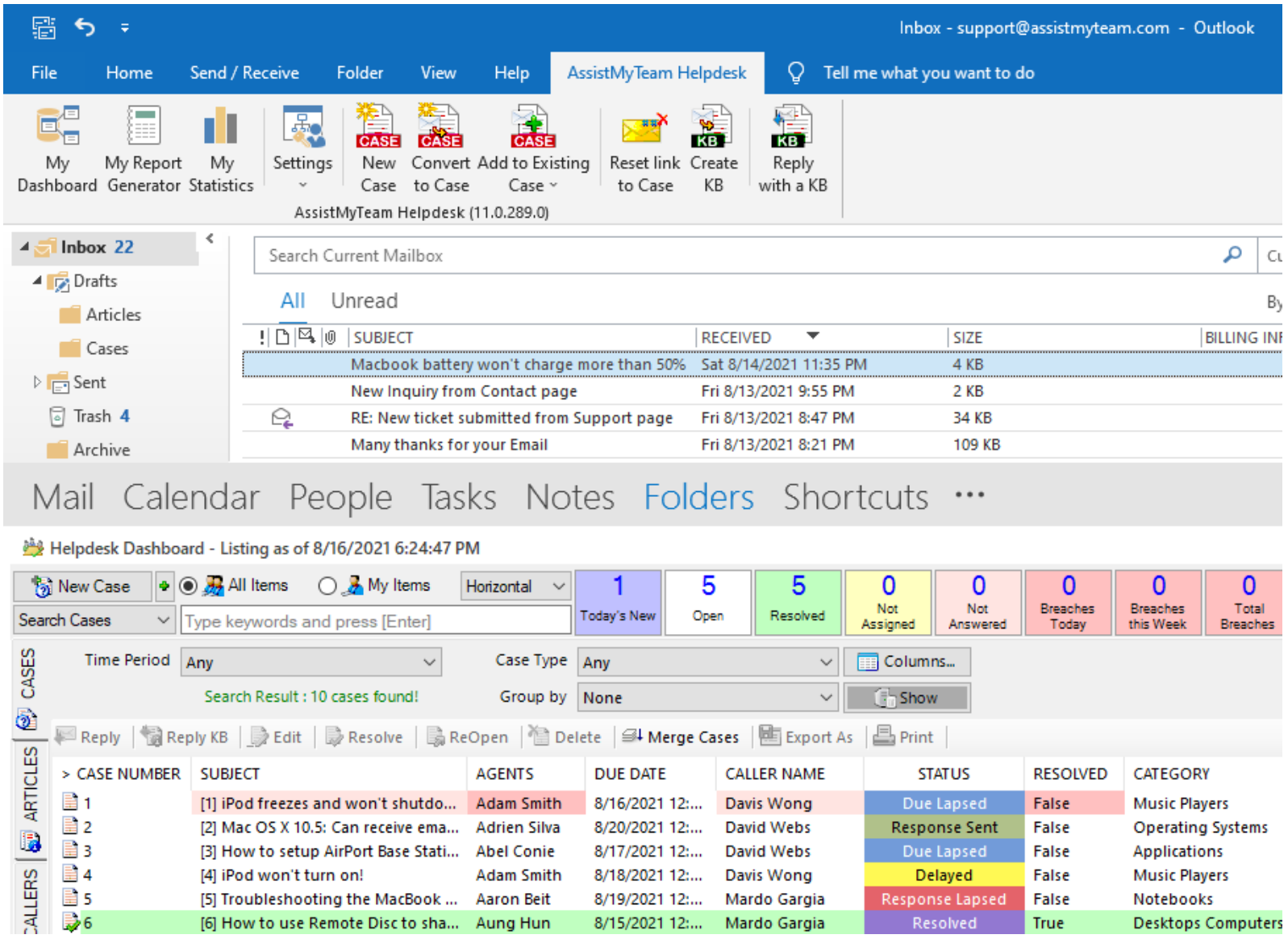
Now start Microsoft Outlook. If the agent add-in installation was successful, you will see a new menu item 'AssistMyTeam Helpdesk' in Outlook (after help menu).

4.2 Establish connection to helpdesk database

The final step is linking up your Helpdesk Agent add-in with a configured SQL Server database. When you start Outlook, you will be prompted to enter the SQL Server details so that the add-in can link up with the existing helpdesk database.

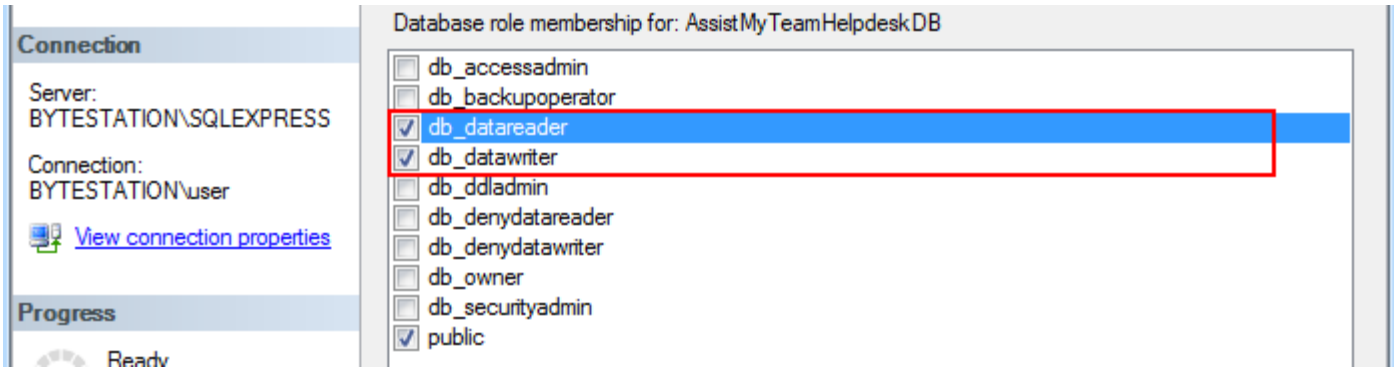


Once you feed your credentials into the SQL Server or Azure Cloud, click **'Save'** button. Consequently, the agent add-in will be connected to the helpdesk database, enabling you to raise new cases from emails, or view them in the dashboard panel.



Additional step for Agents on the SQL database.

Make sure that you have adequate permission to access and update the tables in that database i.e., **db_datareader** and **db_datawriter** permission on the AssistMyTeam Helpdesk SQL database.



The installation folder in your primary drive depends on the installation type you had chosen - Per User or Per Machine.

For **'Per User Installation'**, it would be

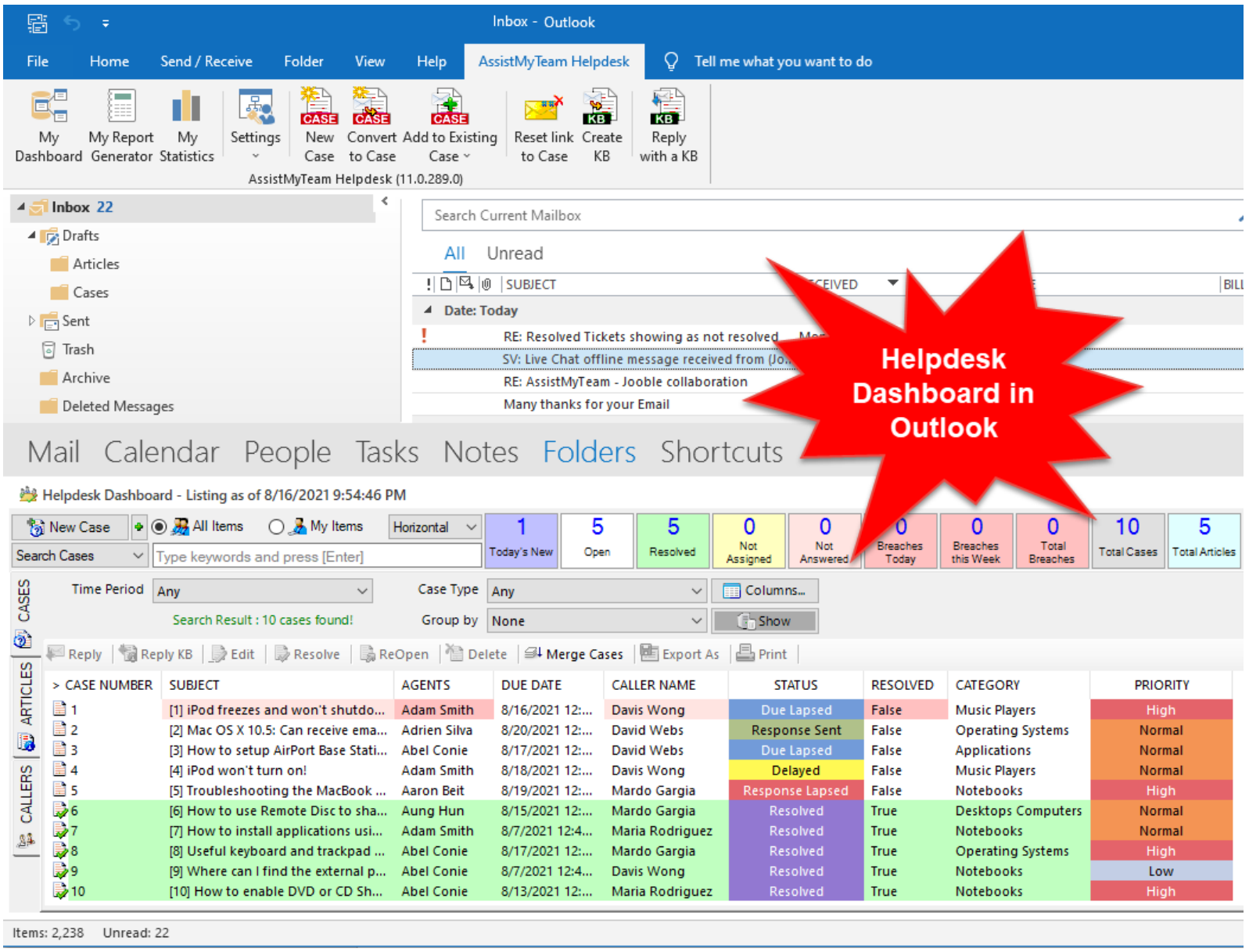
C:\Users\[USER]\AppData\Roaming\AssistMyTeam\AssistMyTeam Helpdesk Agent (x64 or x86)

For **'Per Machine Installation'**, it would be

C:\Program files (x86)\AssistMyTeam\AssistMyTeam Helpdesk Agent (x86 or x64)

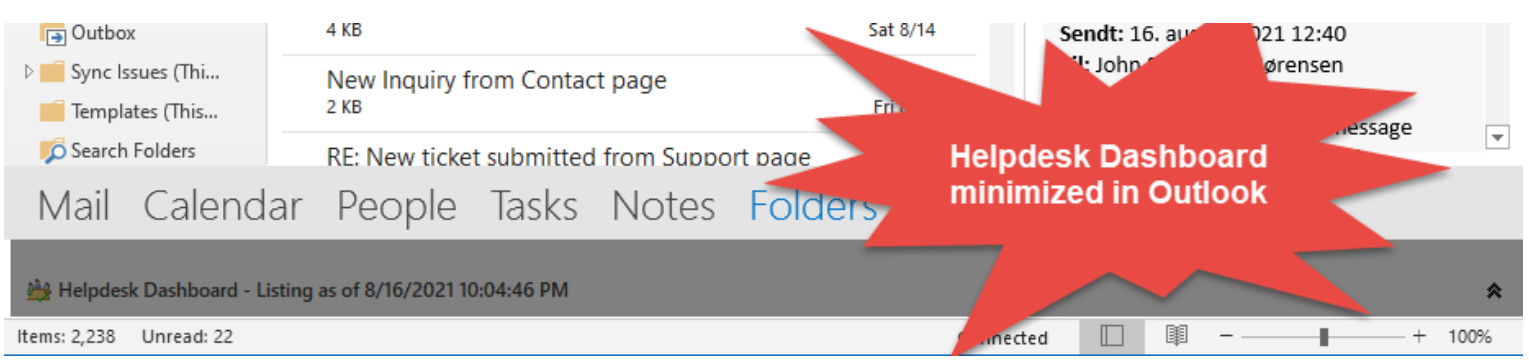
5. Working with Helpdesk Dashboards

The helpdesk dashboards are a powerful monitoring tool. They provide an overview of the most important helpdesk metrics and enables identification of problems and bottlenecks in a quick glance. They are also the main interfaces with which agents interact with cases, articles and callers stored in the helpdesk database. Using the dashboard, agents can prioritize and track their performance better by getting a rundown of their case backlogs.



The helpdesk dashboard contains three sections – **Cases, Articles and Callers.** The dashboard is refreshed every few minutes so that agents are looking at the information in the dashboard from the most current state of the helpdesk data. Instead of having to run a number of queries, the add-in runs these searches automatically, making sure that you are never looking at stale data. You won't have to remember to run important searches once you have selected the parameters in the dashboard - you'll be able to spend your time gaining insight into your assigned cases as well as overall state of your helpdesk.

The helpdesk dashboard panel can be found attached at the bottom portion of your Microsoft Outlook. The dashboard can be resized, adjusted or minimized in your Outlook explorer so that you can interchangeably switch and work between your emails and the cases stored in your external database.



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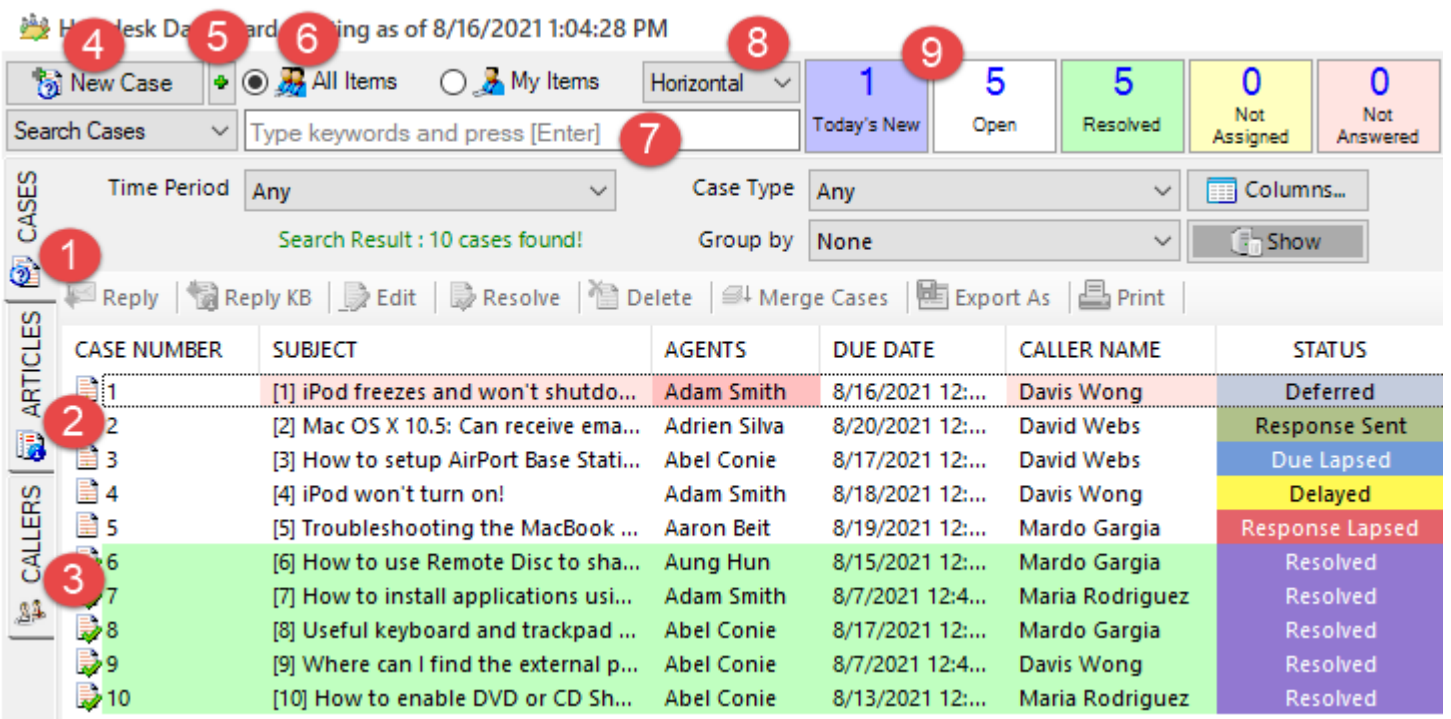
AssistMyTeam

5.1 Understanding the general dashboard UI

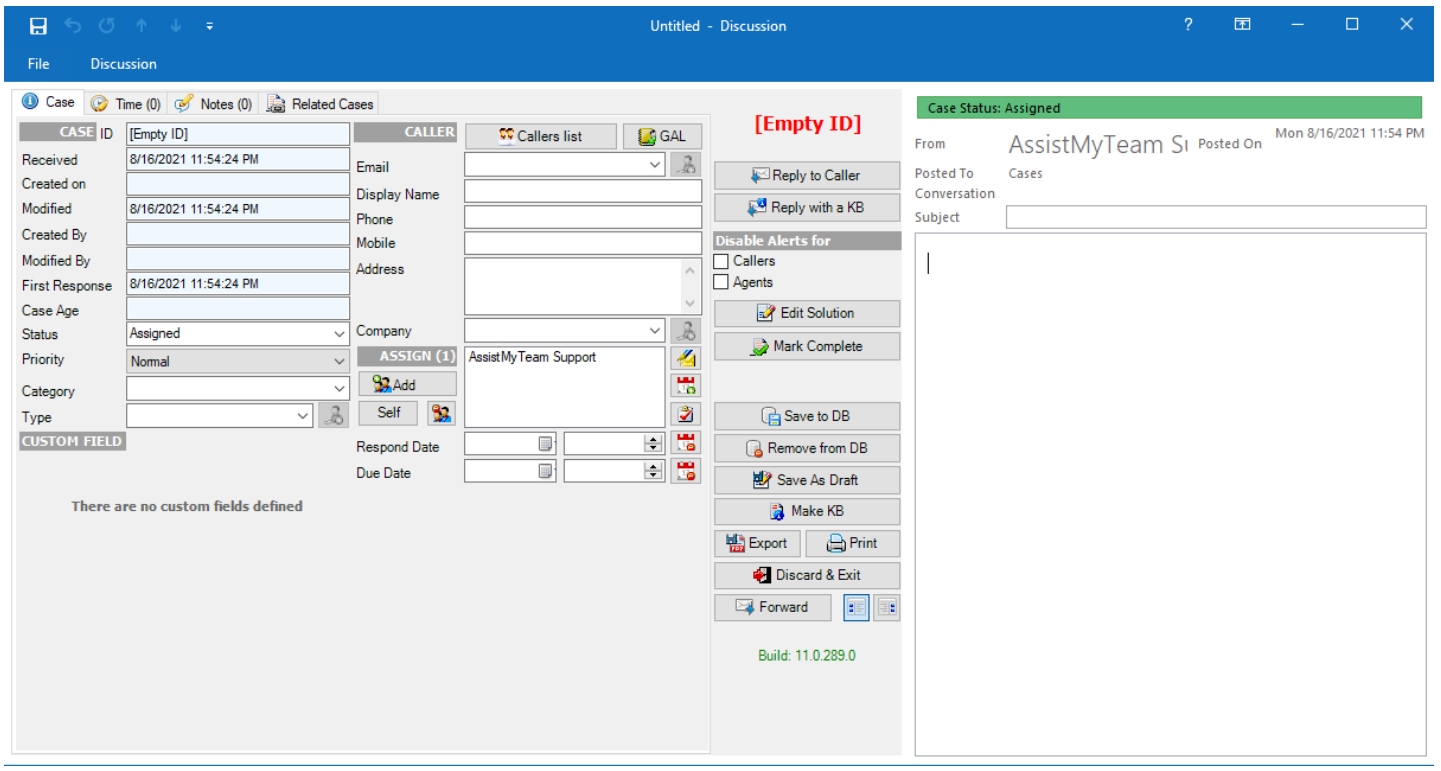


1 The Cases Dashboard section is where agents will interact and work with their assigned cases. Cases can be extracted from the database based on time period and/or types of incidents.

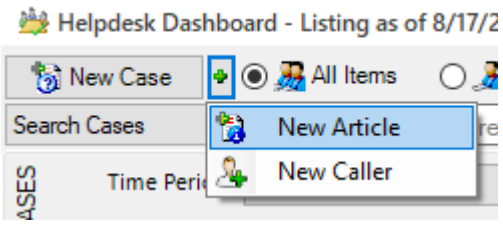
2 The Articles Dashboard section is where agents can view or search knowledge base articles for a possible solution to their assigned cases. Additionally, agent can create and publish new article directly from this section.

3 The Callers Dashboard section is where agents can see the contact details of their assigned or responsible callers. Agent can also instantly create new caller directly from this section.

4 Create a new empty case in the database. A form will be displayed that agent needs to fill in the caller, problem information.



5 To create a new KB article or a caller, choose from the menu that pops down when pressing the plus button.



6 By default, the information and data that are shown in the dashboards are from all items created or assigned to all agents. To filter and only show information with regards to their assigned cases, articles or callers, an agent can choose 'My Items' only option.

7 If the agent specifies some keywords, the add-in will perform a full-text search for the matching keywords on all fields of the case, article or the caller, including the description and consolidated conversation.

8 The placement of the summary information can be made to change from horizontal (default) to vertical depending on the placement of the dashboard panel in Outlook Explorer. For instance, if you place the dashboard on the left or right pane of Outlook, it is recommended that you choose the vertical placement of the summary information as this will give you more optimum working region.

9 The summary information are real-time readings from your helpdesk database. There are 11 boxes – 9 for cases, 1 each for articles and callers. You can click the number or label in the box to load and show those cases, articles or callers in the corresponding dashboard section.

0	5	5	0	0	0	1	1	10	5	6
Today's New	Open	Resolved	Not Assigned	Not Answered	Breaches Today	Breaches this Week	Total Breaches	Total Cases	Total Articles	Total Callers

What each box means?

Today's New – Cases that were logged today

Open – Cases that are ongoing

Resolved – Cases that are closed or completed

Not Assigned – Cases that are yet to be assigned to agents

Not Answered – Cases that are yet to be replied to the callers since their creation.

Breaches Today – Cases that are due today

Breaches This Week – Cases that are due this week

Total Breaches – the total number of Cases in the database that are due

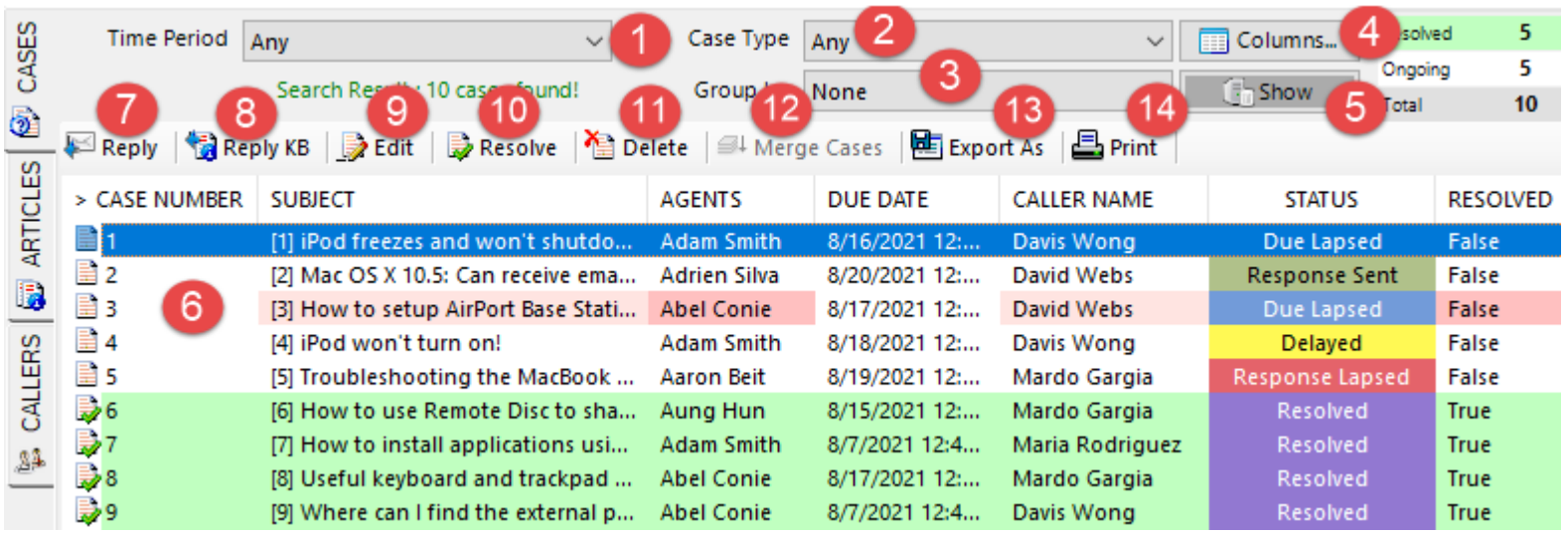
Total Cases – the total number of Cases, both ongoing and closed in the database

Total Articles – the total number of articles in the database

Total Callers – the total number of callers in the database

5.2 Cases Dashboard

The Cases Dashboard section is where agents will interact and work with their assigned cases. Cases can be extracted from the database based on time period and/or types of incidents.



1 Time Period

Choose a time period from the followings under which the search will be confined:

Any
Today
Yesterday
Tomorrow
This week
Last Week
Next Week
This Month
Last Month
Next Month
This Year
Last Year
Date Range...
On

2 Case Type

Choose a report type from the predefined ones below:

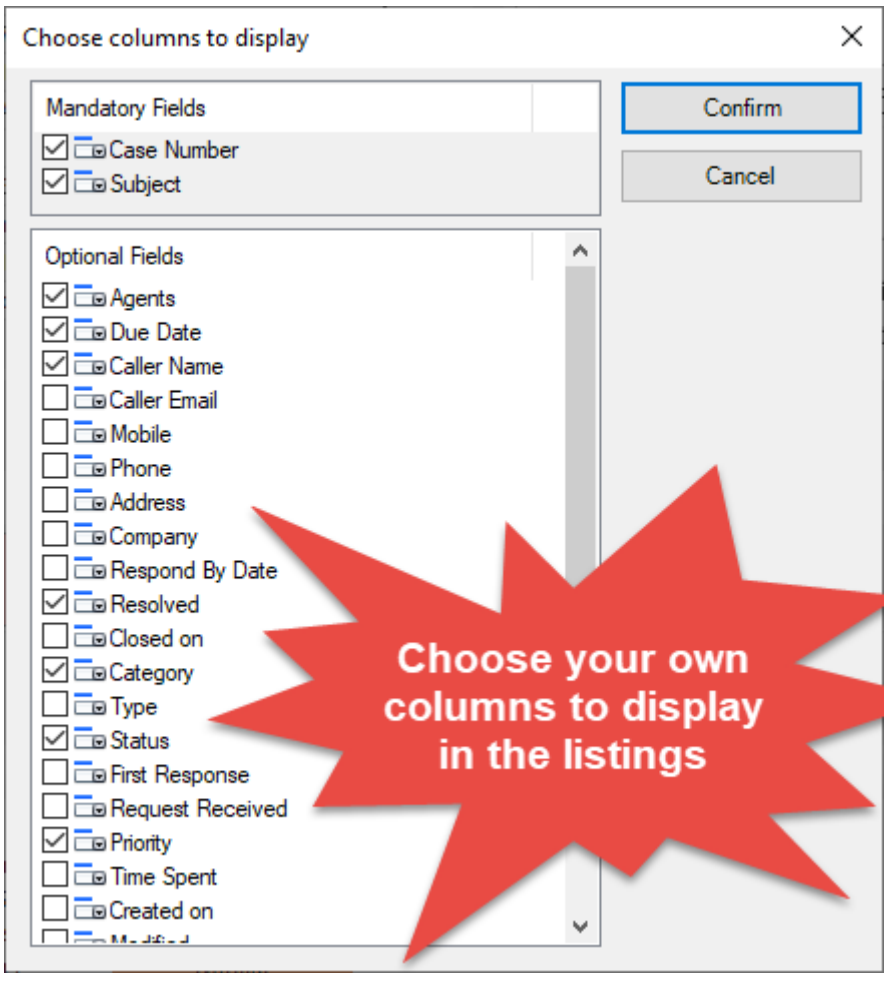
Any
Cases Created
Cases Resolved
Cases Ongoing
Cases Worked
Cases Due
Cases Not Responded
Cases Unassigned
Cases Assigned
Cases lapsed - Due Time
Cases lapsed - Response Time
Cases with no Due Date
Cases with no Response Date
Cases with no Caller
Cases With High Priority
Cases With Normal Priority
Cases With Low Priority

3 Group By

You can choose to group the cases either with - *Agents, Status, Problem Category, Problem Type, Caller, Company, Priority, or Author*.

4 Choose Fields or Columns

You are free to choose which particular helpdesk fields/columns show up in the search result and report. Just click the 'Fields' button, and choose the wanted columns to include.



The tool will remember your choice in subsequent runs. You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.

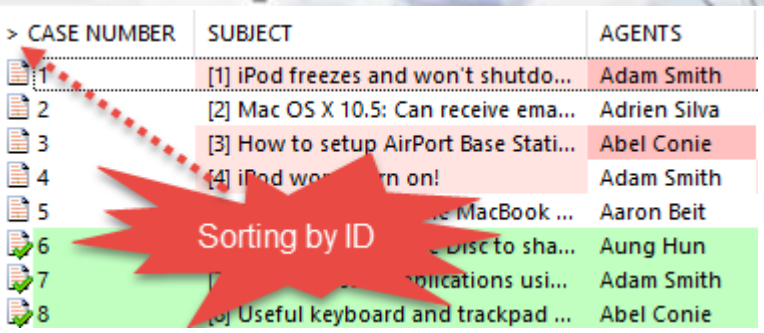
5 Show Cases

Click this button to search the helpdesk database for Cases that match the parameters you had specified.

6 List of Cases

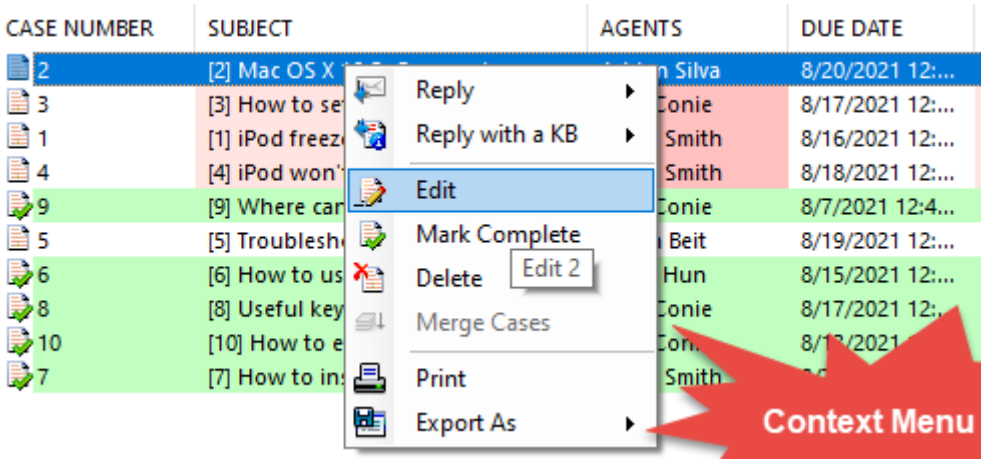
The listings of Cases from the database. To open and view a particular case item, select it from the listings and click 'Edit' button (located in a toolbar just above the listings). You can double-click the case item from the listings, or press Return key (ENTER) from your keyboard.

To sort the cases by the column, click the corresponding column header. The sorting symbol **>** **(ascending)** or **<** **(descending)** will be displayed just before the column header depicting if the sorting is done in ascending or descending order.



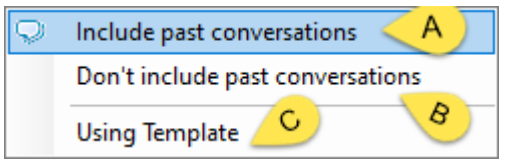
Your choice of sorting, either in ascending or descending order will be remembered in subsequent listings.

The listings also support context menu (i.e., right-click a selected case entry to show a popup menu with support actions available in a click).

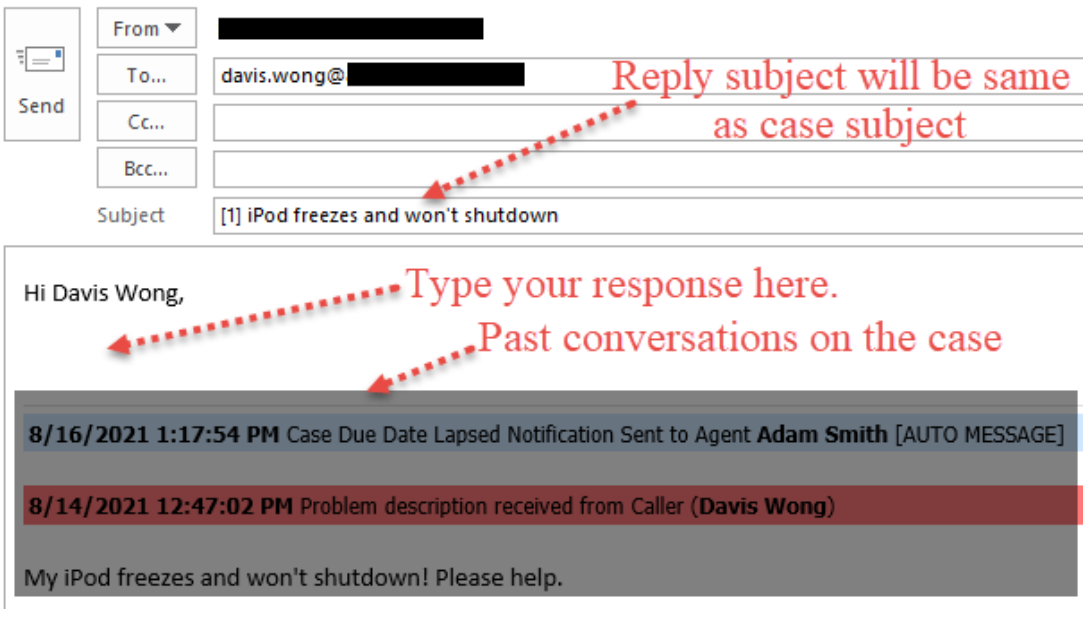


7 Reply to Caller

Compose and send a reply email to the caller of the selected case. There are 3 different types of reply that can be made to the caller.



A Make a reply to the caller by including all the past conversations on the case, including embedded/inline images. The add-in will automatically build the reply email with subject deriving from the case subject and salutation (e.g., Hi CALLER) embedded on the top most part of the body, and preceded by 2 empty line breaks which is where the agent can type in the response. And the bottom section in the body is that of the past conversations of the case.

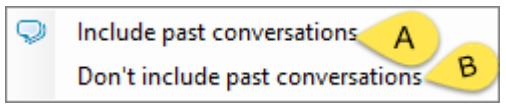


B Make a reply to the caller with no past conversations i.e., with only simple salutation. The subject of the reply will be derived from the case subject and the add-in will make sure; the case number ID is present in it for tracking purpose.

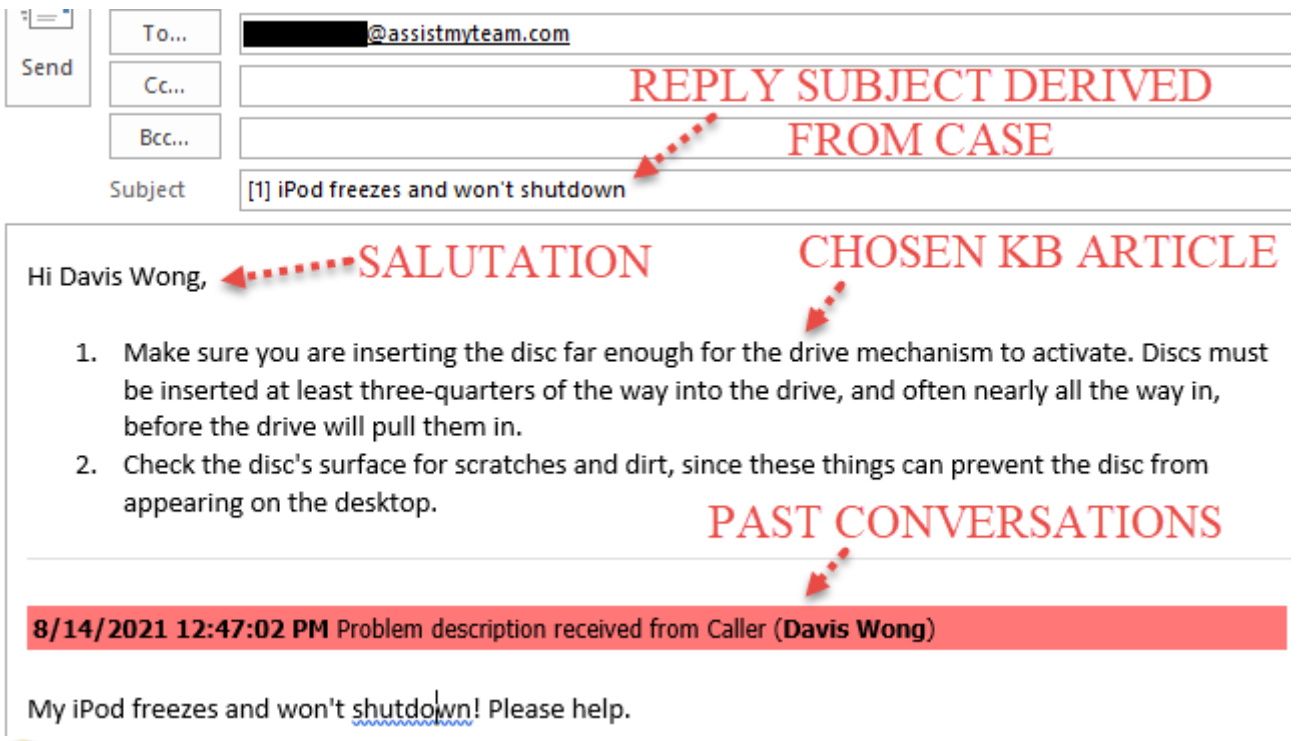
C Make a reply to the caller using a customized email template. This template '**Reply to Caller**' can be accessed from Outlook > Helpdesk Manager > Templates Manager.

8 Reply with a KB

Choose a KB article and embed it to a reply email to the caller. There are two different ways you can make a reply to case with a chosen KB article.



A Make a reply to the caller with a KB article and include all the past conversations on the case, including embedded/inline images. The add-in will automatically build the reply email with subject deriving from the case subject and salutation (e.g., Hi CALLER) embedded on the top most part of the body, and preceded by the chosen KB article. And the bottom section in the body is that of the past conversations of the case.



B Make a reply to the caller with a KB article with no past conversations of the case i.e., with only simple salutation. The subject of the reply will be derived from the case subject and the add-in will make sure; the case number ID is present in it for tracking purpose.

9 View or Edit

Open the selected case in its inspector window in Outlook for viewing or further editing. You can also double-click the selected case or press return key (ENTER) from your keyboard to produce the same effect.

10 Mark Complete / Re-Open

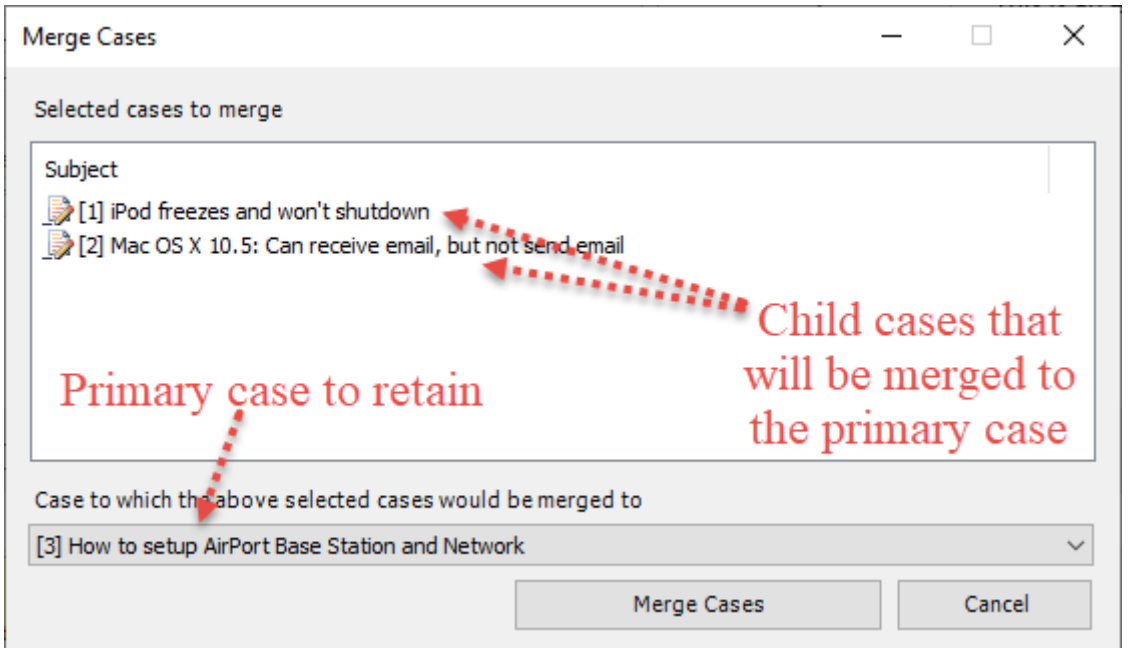
If the selected case is ongoing, you can click this button to mark it complete. And if it a resolved case, you can click to re-open it,

11 Delete

Permanently remove the selected cases from the Helpdesk database. You will be prompted with a confirmation. WARNING: This action is irreversible and so be very sure what you are removing.

12 Merge Cases into One

Merge the selected cases to one single case. Sometimes, a caller might contact you through separate emails or channels regarding a particular issue. The same issue might be logged as a case by a different agent not knowing an existing one already exists. To avoid duplication and conflicts, you can merge all related cases together and keep the communication streamlined.

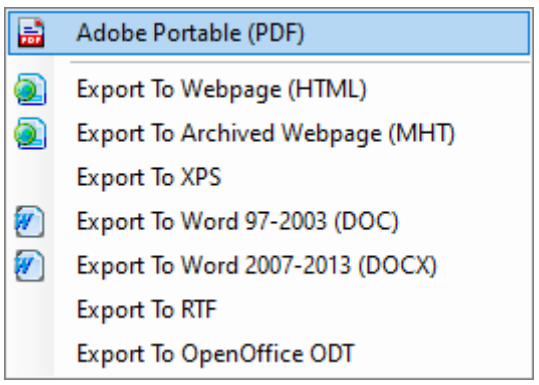


The merge action is irreversible, and causes the following things to happen:

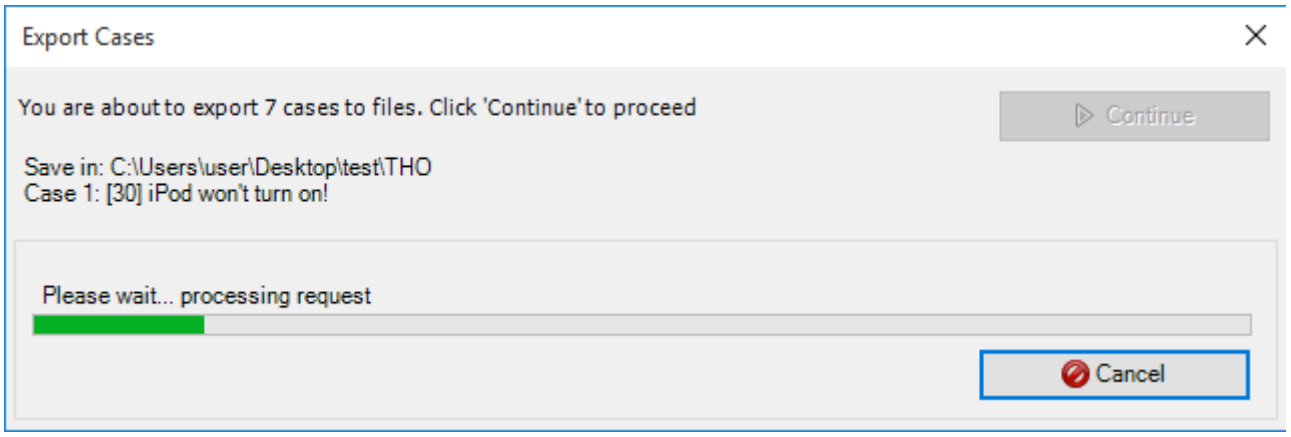
a) One of the cases becomes the primary case (you get to choose).
b) All conversations from the secondary tickets are moved into the primary case.

13 Export to PDF

Export the selected cases to PDF document files. You can also export to Word Documents, HTML, plain text etc.



Multiple cases can be batch exported. Just select multiple cases from the list and choose one of the document types to export to, and the batch wizard will perform the rest.



You can control what case data are included in the files by customizing the '**Print**' template under *AssistMyTeam Helpdesk Manager > Templates Manager.* For example, place the variable **'CASE_BODY**' in the Print template such that the exported file (e.g., pdf) contains all the consolidated conversations (body) from the case item including inline images.

14 Print a Case

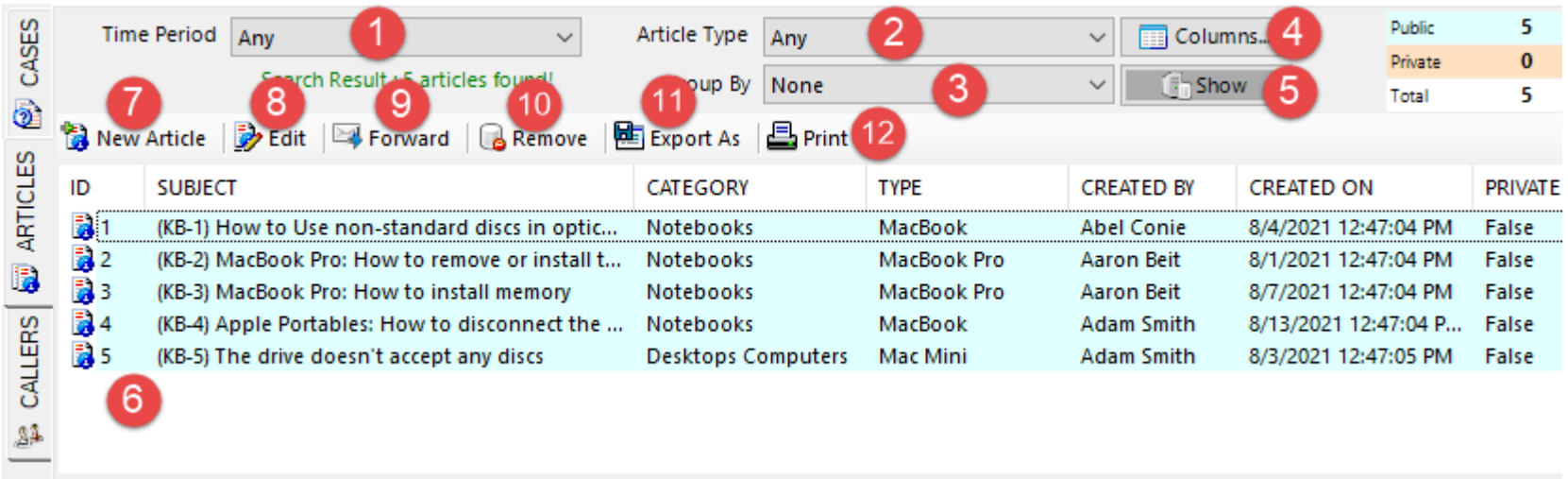
Click this to print the selected cases using the **'Print'** template (as defined under *AssistMyTeam Helpdesk Manager > Templates Manager*). If you select a single case to print, it will show you the print dialog option, where you can customize the layout, paper size etc. However, if you choose multiple cases, it will print directly using the default settings without displaying any 'Print' options.

5.3 Articles Dashboard

The Articles Dashboard section is where agents can view or search knowledge base articles for a possible solution to their assigned cases. Additionally, agent can create and publish new article directly from this section.

With a knowledge base, you and your team mates can document best practices and solutions to common problems so that they can be used when replying to time-consuming and repeated queries. Any support case is eligible to become flagged as a KB Article. An agent recognizing a repetitive support issue, can easily flag a resolved case as a knowledge article. Thus, it acts as an effective knowledge sharing medium, boosting support productivity by leveraging collective knowledge and providing invaluable KB Articles to support techs in a snap! It also helps in improving the average 'First Call Resolution' timing significantly, as agents find resolution to problems quickly.

KB articles in the dashboard listings are arranged in hierarchical tree (by group KB items into 'Problem Category' and then to 'Problem Type'). This arrangement makes it very easy to browse for a particular knowledge base at the time of need.



1 Time Period

Choose a time period from the followings under which the search will be confined:

Any	Last Week	**This Year**
Today	Next Week	Last Year
Yesterday	This Month	Date Range...
Tomorrow	Last Month	On
This week	Next Month	

2 Case Type

Choose an article type from the predefined ones below:

Any	Personal Articles
Articles Created	Public Articles
Articles Modified	

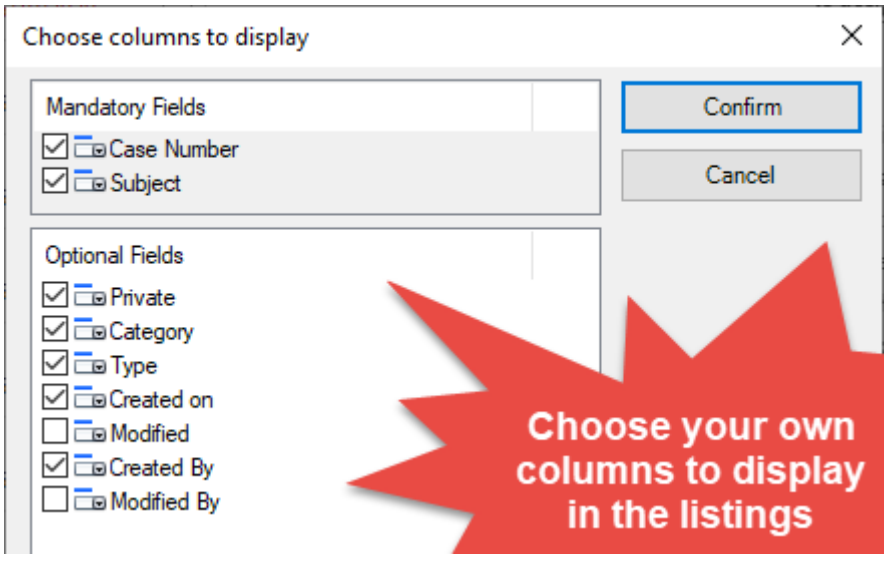
3 Group By

You can choose to group the articles either with - *Category, Type, Created by and Modified By*. Here is an example of articles listing group by 'Category'.

> ID	SUBJECT	CATEGORY	TYPE	CREATED BY
Desktops Computers (1)				
5	(KB-5) The drive doesn't accept any discs	Desktops Computers	Mac Mini	Adam Smith
Notebooks (4)				
1	(KB-1) How to Use non-standard discs in optic...	Notebooks	MacBook	Abel Conie
2	(KB-2) MacBook Pro: How to remove or install t...	Notebooks	MacBook Pro	Aaron Beit
3	(KB-3) MacBook Pro: How to install memory	Notebooks	MacBook Pro	Aaron Beit

4 Choose Fields or Columns

You are free to choose your own article fields/columns to show up in the search result and report. Just click the 'Fields' button, and check your columns to include.



The add-in will remember your choice in subsequent runs. You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.

5 Show Articles

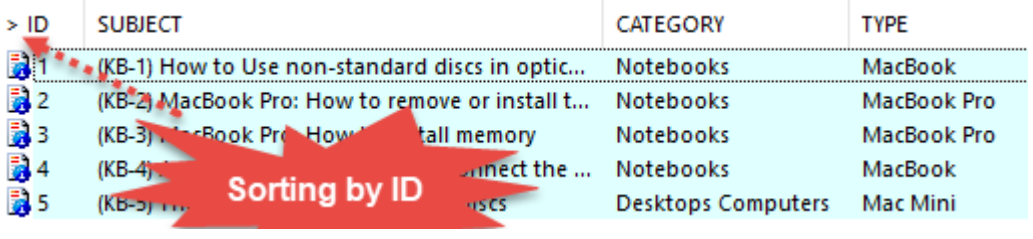
Click this button to search the helpdesk database for articles that match the parameters you had specified.

6 List of Articles

The listings of articles from the database. To open and view a particular article item, select it from the listings and click 'Edit' button (located in a toolbar just above the listings). You can double-click the article item from the listings, or press Return key (ENTER) from your keyboard.

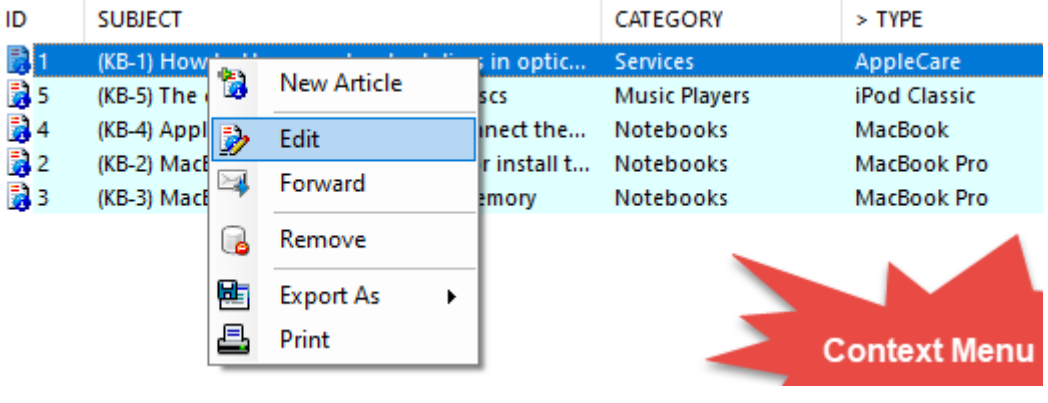
To sort the articles by the column, click the corresponding column header. The sorting symbol **>** **(ascending)** or **<** **(descending)** will be displayed just before the column header depicting if the sorting is done in ascending or descending order.

Below is an example of a listing sorted by ID column.



Your choice of sorting, either in ascending or descending order will be remembered in subsequent listings.

The listings also support context menu (i.e., right-click a selected case entry to show a popup menu with support actions available in a click).



7 New Article

Create a new empty article where you can compose the content.

8 Edit Article

Open the selected article in its inspector window in Outlook for viewing or further editing. You can also double-click the selected article or press return key (ENTER) from your keyboard to produce the same effect.

9 Forward Article

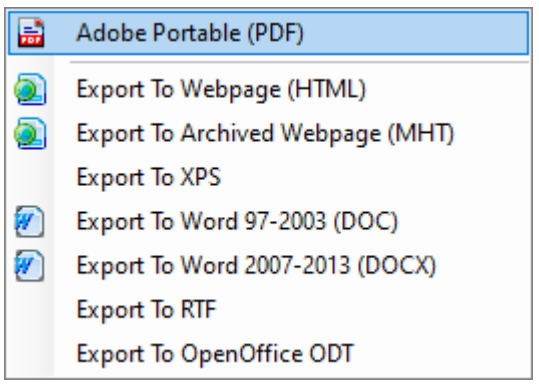
Forward the selected article to a recipient.

10 Remove Article

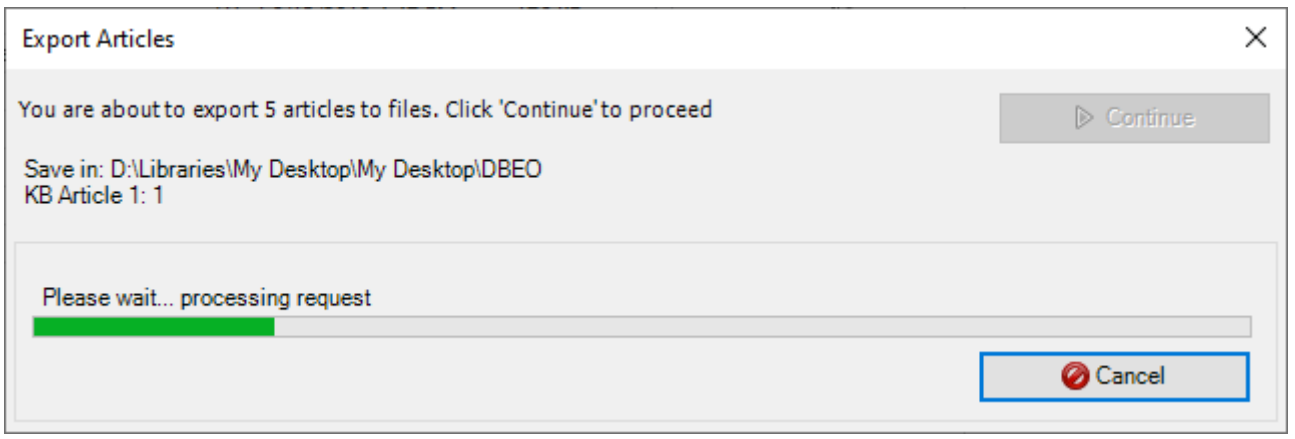
Permanently remove the selected articles from the Helpdesk database. You will be prompted with a confirmation. WARNING: This action is irreversible and so be very sure what you are removing.

11 Export to PDF

Export the selected articles to PDF document files. You can also export to Word Documents, HTML, plain text etc.



Multiple articles can be batch exported. Just select multiple articles from the list and choose one of the document types to export to, and the batch wizard will perform the rest.

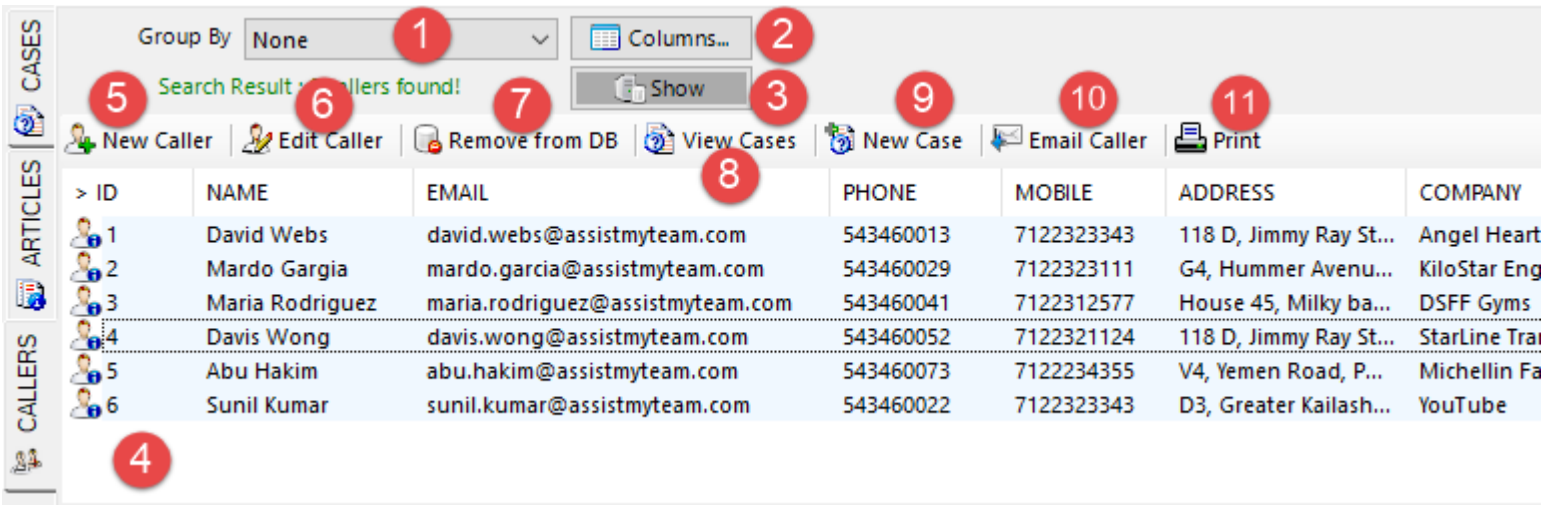


12 Print an article

Click this to print the selected articles. If you select a single article to print, it will show you the print dialog option, where you can customize the layout, paper size etc. However, if you choose multiple articles, it will print directly using the default settings without displaying any 'Print' options.

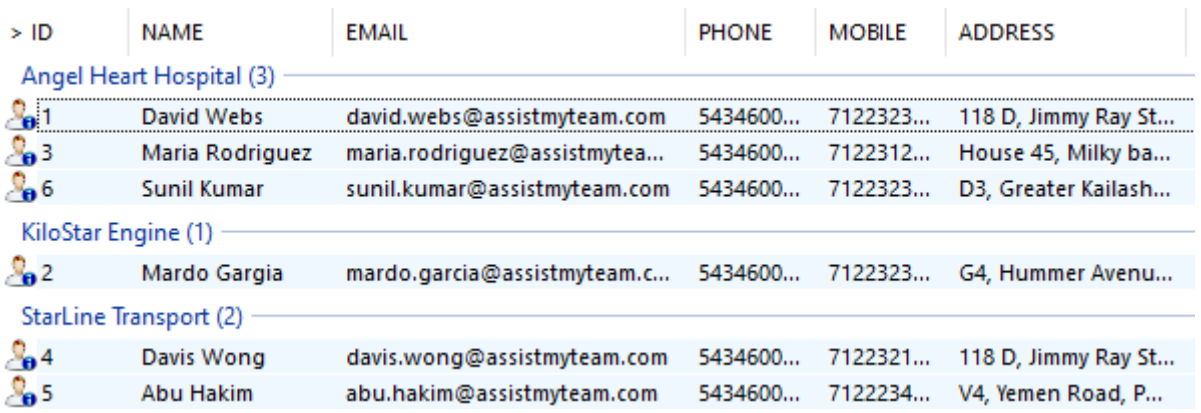
5.4 Callers Dashboard

The Callers Dashboard section is where agents can see the contact details of their assigned or responsible callers. Agent can also instantly create new caller directly from this section.



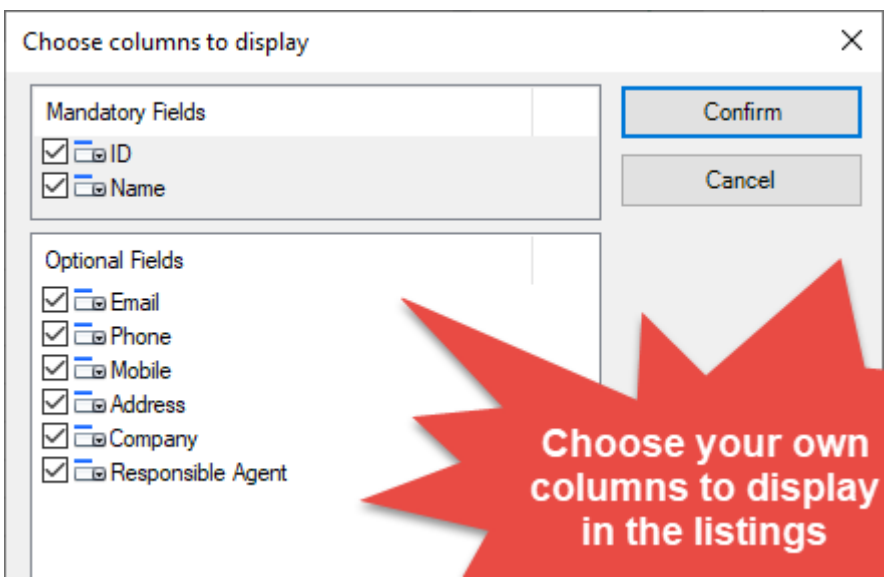
1 Group By

You can choose to group the callers either by company or assigned agent. For example, below is a listing of callers group by Company.



2 Customize Fields or Columns

You are free to choose your own caller fields/columns to show up in the search result and report. Just click the 'Fields' button, and check your columns to include.



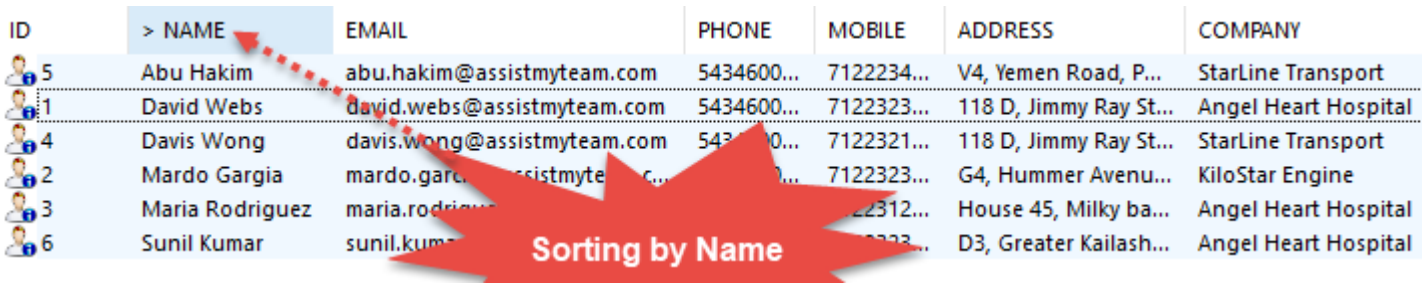
The add-in will remember your choice in subsequent runs. You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.

3 Show Callers

Click this button to search the helpdesk database for callers that match the parameters you had specified.

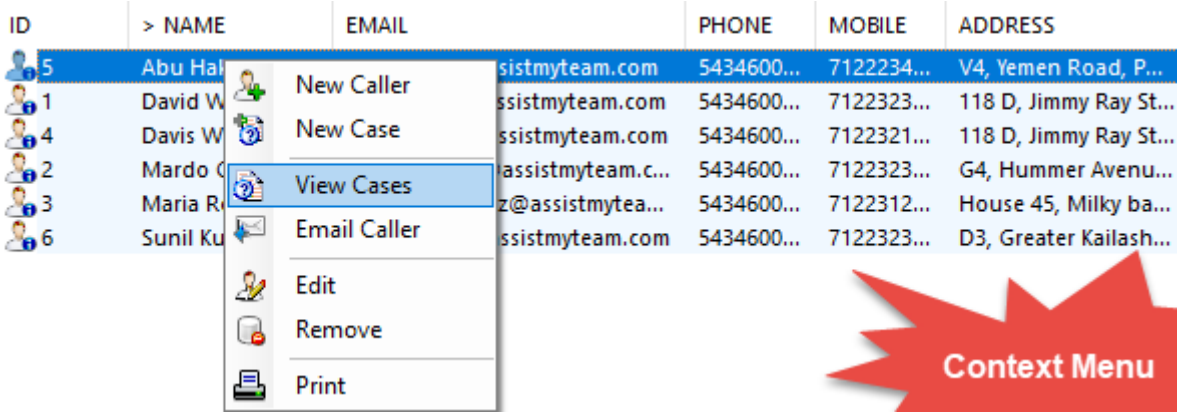
4 The listings of callers from the database. To open and view a particular caller entry, select it from the listings and click 'Edit' button (located in a toolbar just above the listings). You can double-click the caller entry from the listings, or press Return key (ENTER) from your keyboard.

To sort the callers by the column, click the corresponding column header. The sorting symbol **>** **(ascending)** or **<** **(descending)** will be displayed just before the column header depicting if the sorting is done in ascending or descending order.



Your choice of sorting, either in ascending or descending order will be remembered in subsequent listings.

The listings also support context menu (i.e., right-click a selected case entry to show a popup menu with support actions available in a click).



5 New Caller

Create a new empty caller where you will need to fill in the contact details.

6 Edit Caller

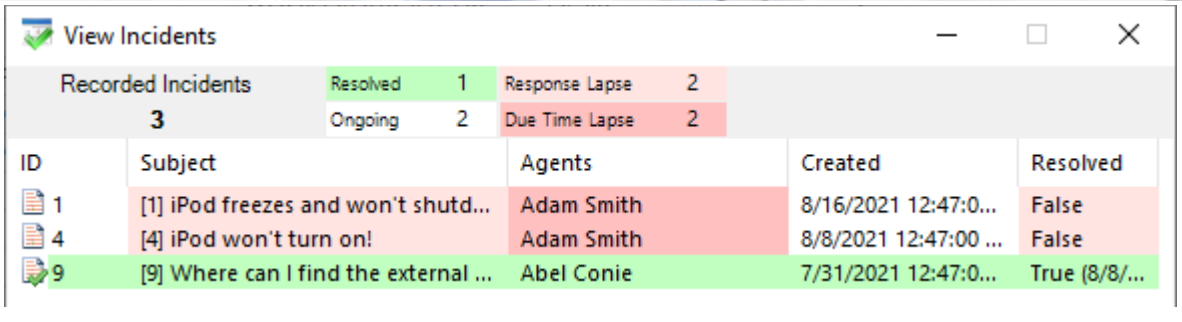
Open the selected caller to view its contact detail or further editing. You can also double-click the selected caller entry or press return key [ENTER] from your keyboard to produce the same effect.

7 Remove Caller

Permanently remove the selected callers from the Helpdesk database. You will be prompted with a confirmation. WARNING: This action is irreversible and so be very sure what you are removing.

8 View Cases

Show the cases that are allotted to the selected caller. This will load the cases in a new window. To view or edit the detail of a case, double-click it.



9 New Case

Raise a new empty case for the chosen caller. This will populate the contact details of the chosen caller to the new case.

10 Email Caller

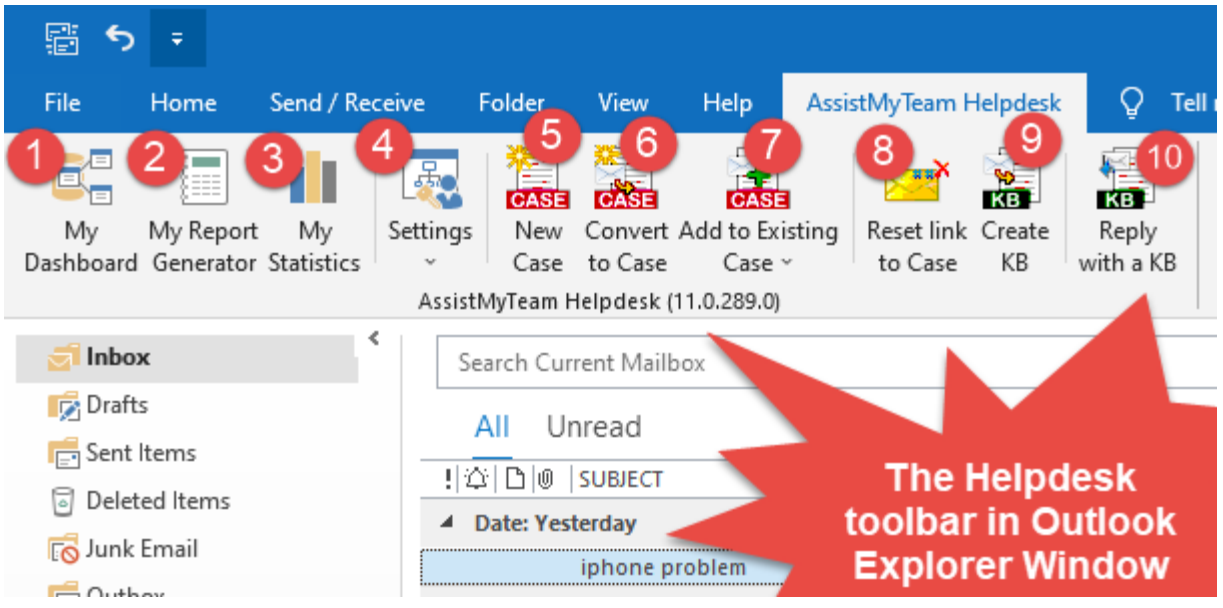
Compose a new email to the chosen caller. The add-in will automatically add the salutation (e.g., Hi XYZ) to the body of the email.

11 Print

Click this to print the selected callers. If you select a single caller to print, it will show you the print dialog option, where you can customize the layout, paper size etc. However, if you choose multiple callers, it will print directly using the default settings without displaying any 'Print' options.

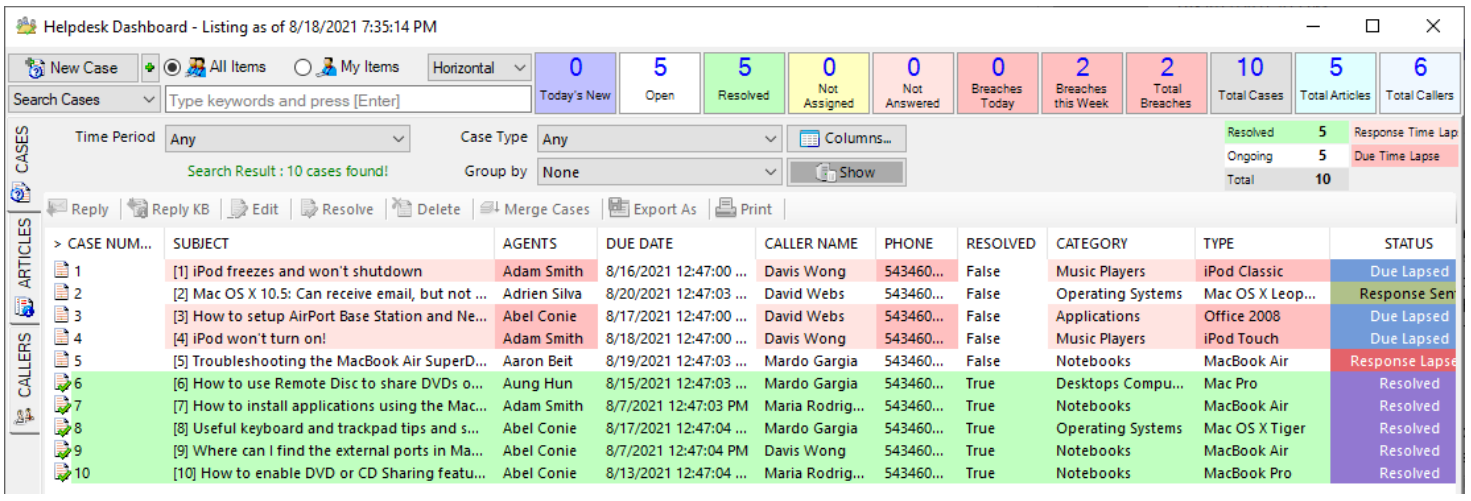
6. Working with the Helpdesk toolbar UI

The Helpdesk toolbars along with the dashboards are the primary medium with which agents work and interface with their support cases in Microsoft Outlook.



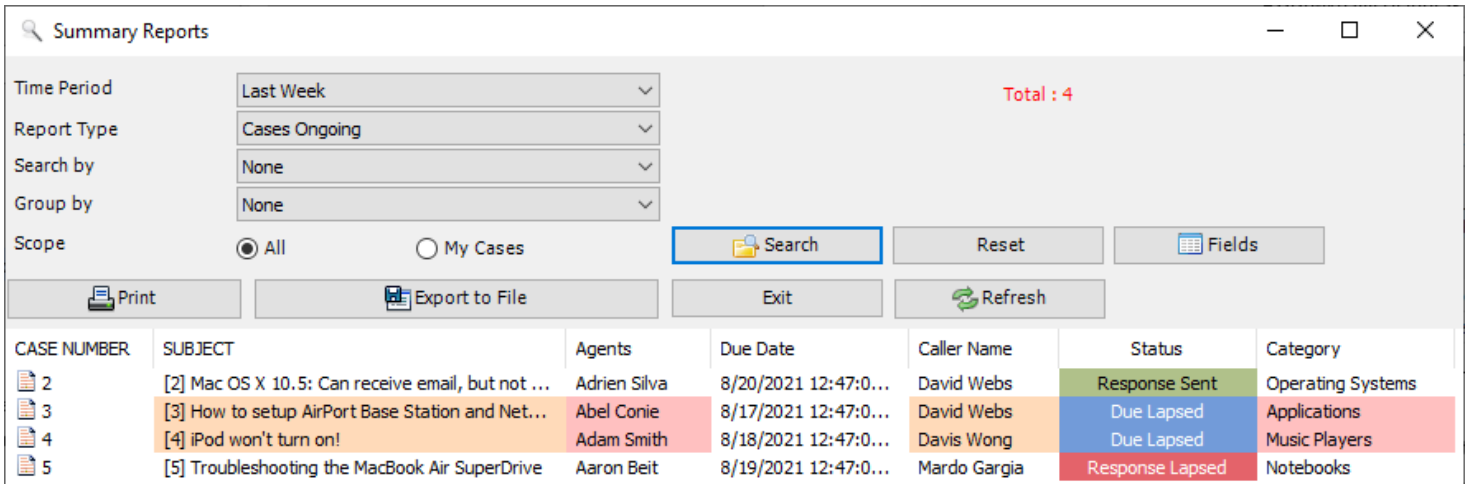
1 My Dashboard

Open a new dashboard window outside of Outlook. This is in addition to the integrated dashboard that is available in the lower part of your Outlook Explorer window. With this additional dashboard, you have a much larger area to work with your cases and articles, independent to the one available in Outlook. To learn more, refer to the '<u>Working with Helpdesk Dashboards</u>' section.



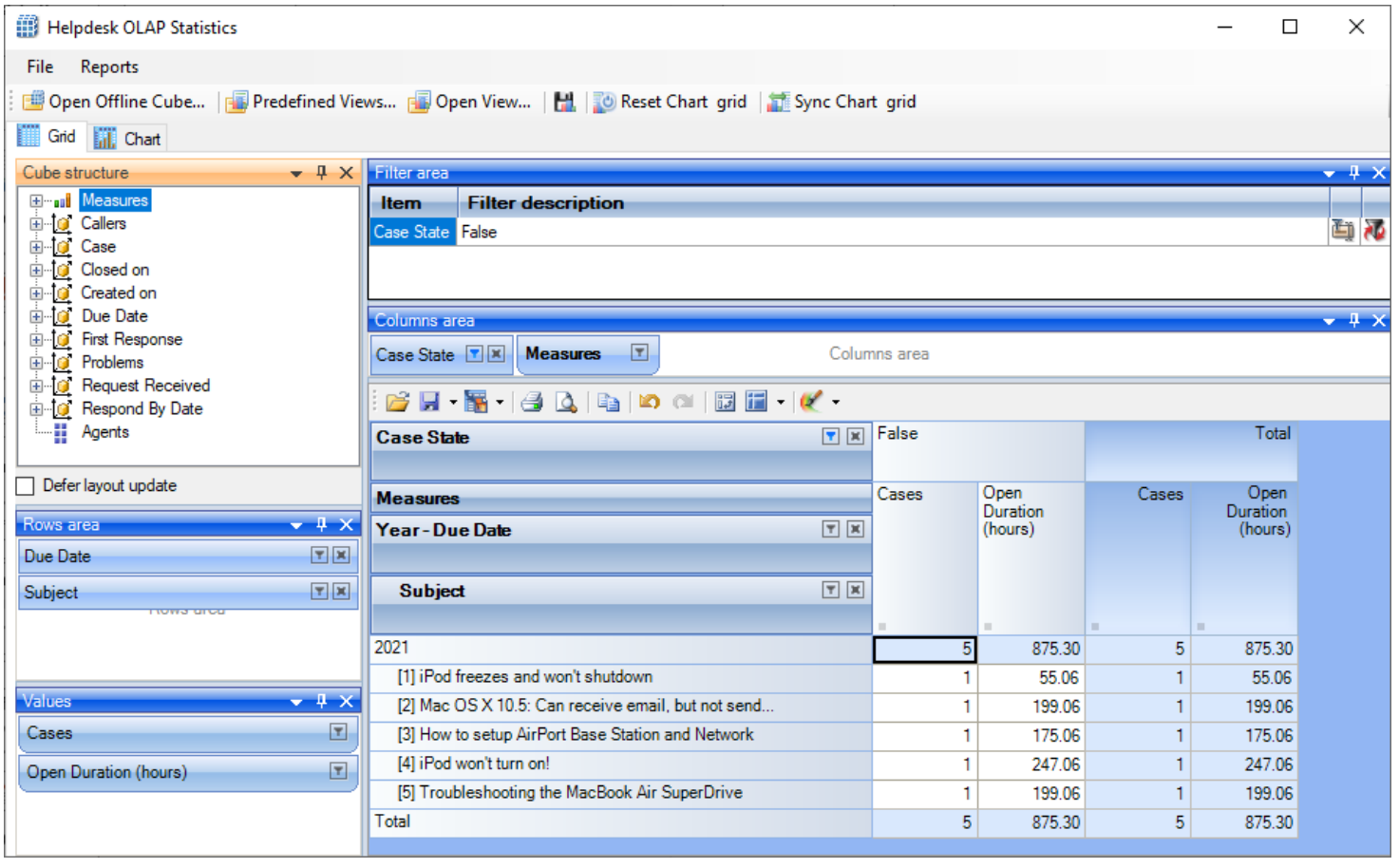
2 My Report Generator

Open the summary report generator tool and generate reports on support cases quickly to be saved as file or printed for sharing and distribution. To learn more, refer to the '<u>Generating Reports</u>' section.



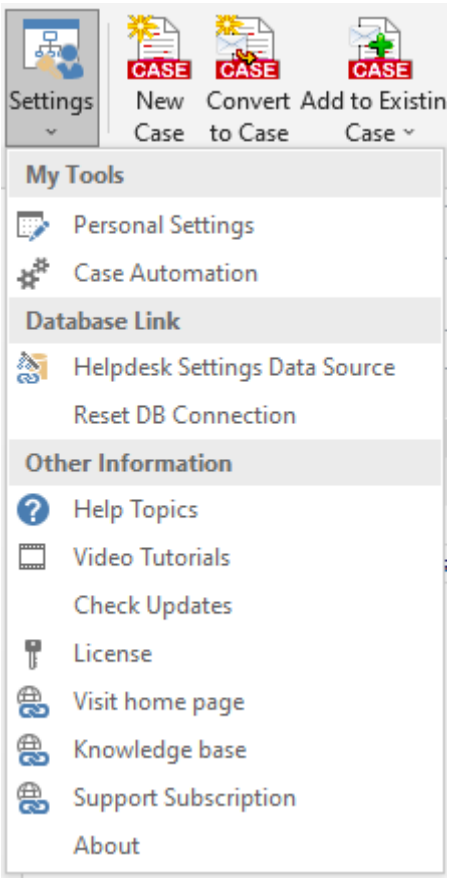
3 My Statistics

Open the statistical OLAP tool and analyze the cases data in multidimensional view with grids, charts and graphs.



4 My Settings

This is a drop-down menu containing tools, database connection utilities and important links to the helpdesk app, manuals etc. For further information on each of the available options, refer to Configuring my Settings section.



5 New Case

Raise a new empty case. This will open a new inspector window in Outlook where you will need to fill in the problem subject and summary, caller details, initial status and assign it to an agent.

To learn more, refer to the 'Understanding the case form in Outlook' section.

6 Convert to Case

Clicking this will convert an email send by a caller requesting support to a case in the helpdesk database. The add-in will automatically extract the contact details from the email such as sender name, sender email, phone, company information etc. and populate to the case.

To learn more, refer to the 'Raise a new case from an email manually' section.

7 Add to Existing Case

Clicking this will allow you to add the selected emails to an existing case in the helpdesk database. This comes handy when you have emails that are related to an existing case and would like to add them to the case.

To learn more, refer to the 'Add an email to a case' section.

8 Reset link to Case

Use this to remove any references of a case from the selected emails. References can be in the form of presence of a case ID in the subject of the email, or the presence of a flag on the email. Removing these references would allow you to raise a new case out of that email again.

9 Create KB

If an email contains useful information that helps in solving a problem, you can use it as a source to create a new KB article in the helpdesk for future use.

To learn more, refer to the 'Creating a new KB article' section.

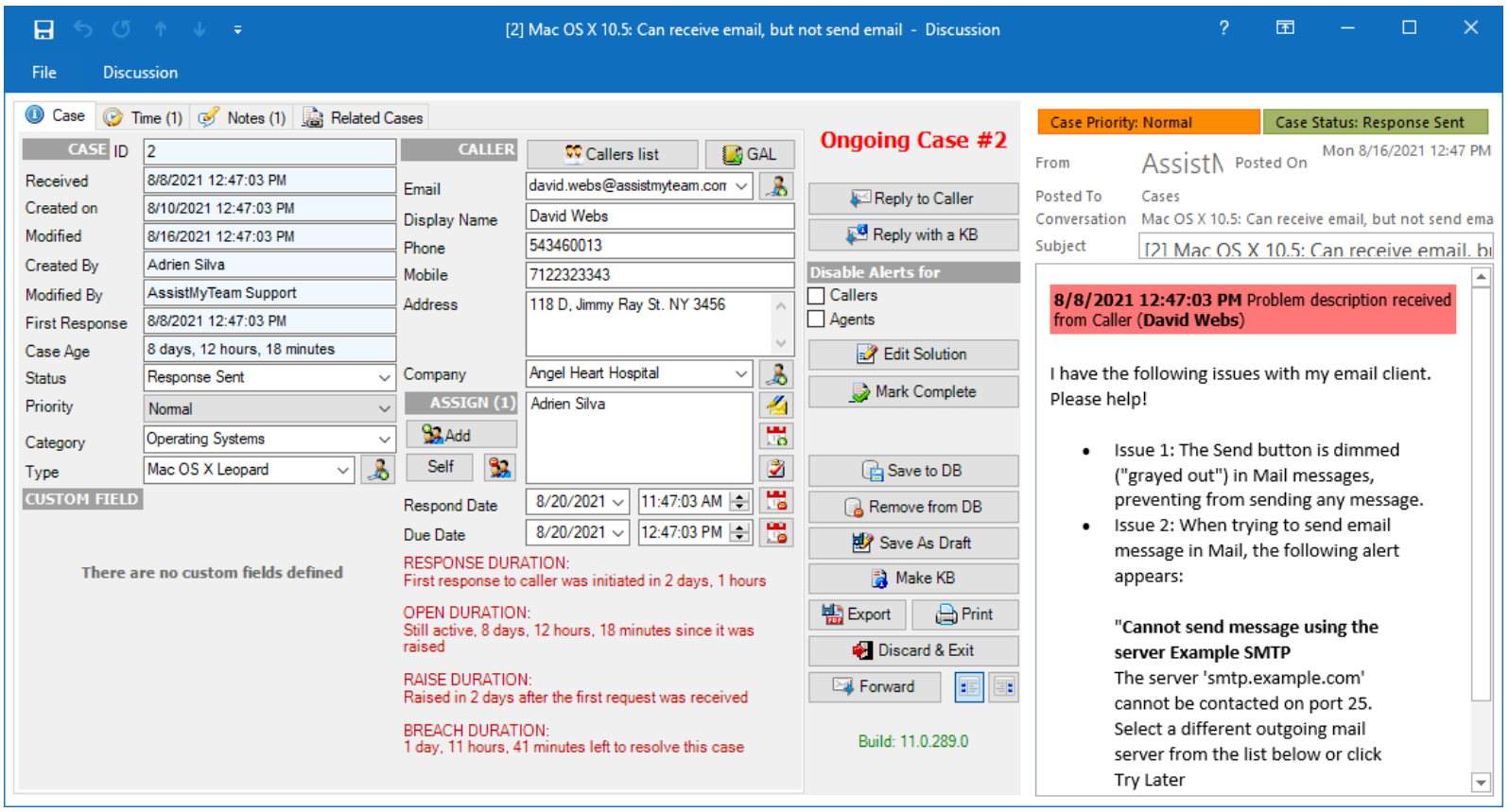
10 Reply with a KB

If you have received an email that is seeking for support request, and if you know there is already a KB article that addresses that problem, you can use this to choose that KB article and send it as a reply to the sender. A dialog window allows the agents to browse through the existing knowledge base articles.

To learn more, refer to the 'How to use the knowledge base article' section.

7. Understanding the Case form in Outlook

The support request form in Outlook is designed to log in a new case and view existing ones from the database in Outlook. There are four (4) sections in the form – **Case**, **Time Spent**, **Notes** and **Related Cases**.



In the case section, information catering to the case, caller, agent, problems etc. are laid out in a very intuitive way. Fields such as problem category, type, status are available in drop down format (configurable by the helpdesk manager) so as to limit the choice the agent can select for such fields. Managers can assign multiple agents to a particular case if the scope of the problem extends beyond the capability of an agent. Automatic notification messages are sent out immediately to the concerned agents once the case is assigned or a due date is specified or changed. Optionally, a due date appointment or task can also be added to the personal mailbox of the assigned agents.

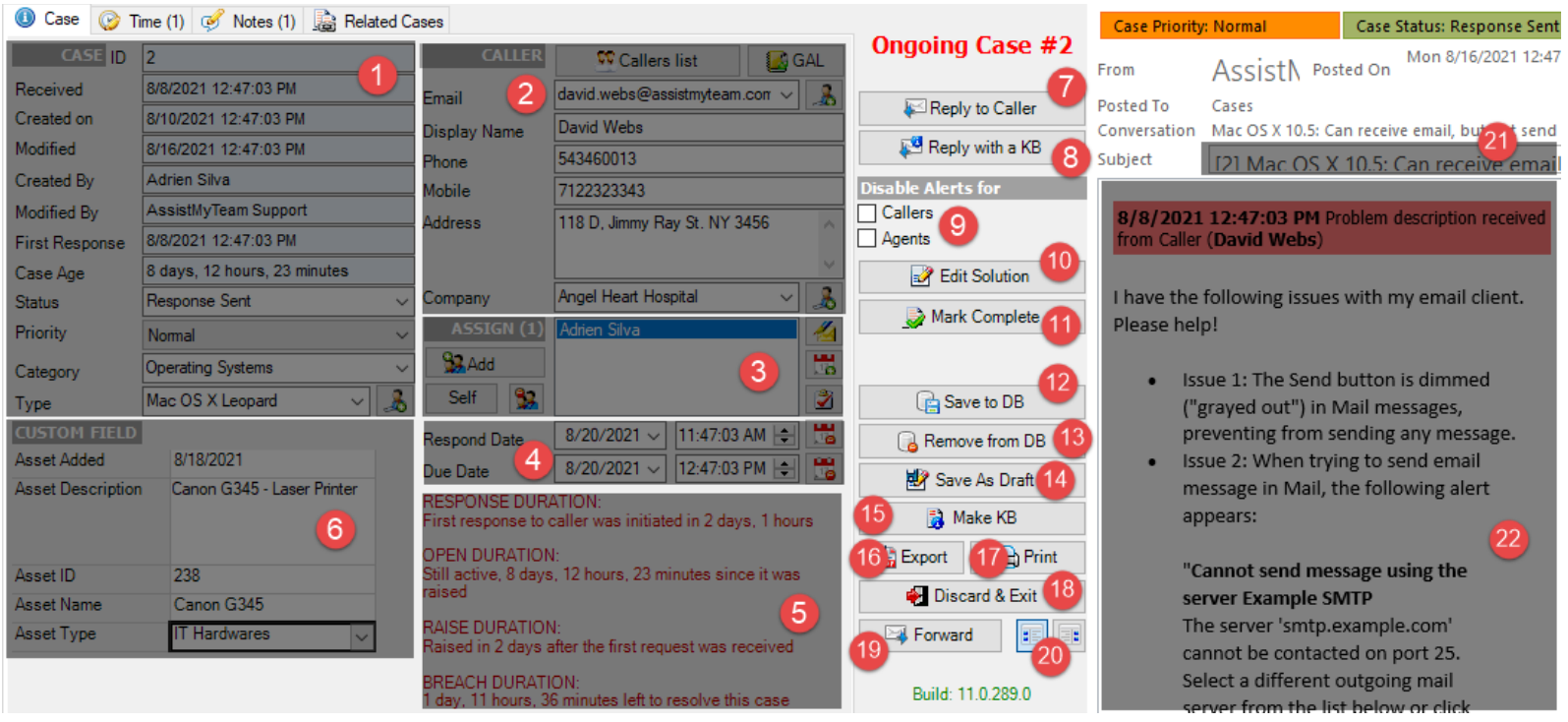
In the Time Spent section, each agent can add their time spent when working on solving the case. This is particularly useful if your organization pays the agents by the hour. By collection time spent data from the case, manager can extract payment or billing information for the agents.

In the Notes section, agents and managers can add private or internal notes to the case for reference. The add-in can also be configured to add such notes to the consolidated conversations of the case.

In the Related Cases section, agent can get reference to other cases that are related in terms of having the same caller, company or domain.

7.1 Case Information

The first section of the case form consists of fields related to caller, assigned agents, problems, due date etc.



1 Case metadata

These are meta-data fields of the case and are generally populated when the case was logged and raised.

Case ID - The unique number that identifies the case in the helpdesk database. Every email communication out of the helpdesk to the callers are tagged with the corresponding Case ID (enclosed within the square brackets for tracking purpose. E.g., [2].

Received - The date/time the case (usually an email) was first received in Inbox.

Created On - The date/time the case was logged, either from Outlook items such as email or phone call.

Modified – The date/time the case was last worked on.

Created By – The support staff (or agent) take was responsible for logging this case.

Modified By – The support staff (or agent) take recently modified and updated the case.

First Response – The date/time the first response to the caller was made (by an agent) after this case was raised.

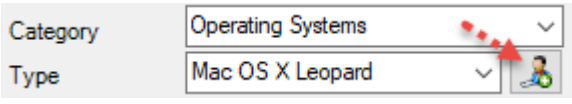
Case Age - Shows the duration (in days) the case is active.

Status - This is a drop-down field that consists of the problem status list (customizable by agents with admin access).

Priority - This is the same Outlook importance field that takes one of these values - **High**, **Normal** and **Low**.

Category - A drop-down field that consists of the problem category list. Specify the problem category to which the support request belongs to.

Type - A drop-down field that consists of a type list (sub-category) for each problem category. The type list changes depending on the item selected in the problem category drop down field.

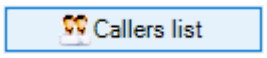


Apply default agent - This check button gets enabled when a combination of Category and Type is selected from the drop-downs. Clicking this would automatically assign the agent (associated with selected problem) to the current case.

2 Caller Information of the Case

These are caller specific fields that are collected from email, address book or global address list.

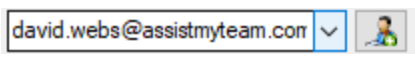
Callers List – Choose a caller from the Callers List maintained under AssistMyTeam Helpdesk settings database for this case. Manager can maintain a list of callers under AssistMyTeam Helpdesk Manager > Callers List panel.



Pick caller from Global Address List (GAL) - Allows the agent to pick a user from the address book (e.g., global address list). For new (empty) support request, an agent can easily pick a contact from the address book (e.g., GAL) and that populates any additional caller details automatically.

The email address of the caller - This drop-down field houses all the email address of the callers defined in the Callers list manager. This is useful when the agent had to manually log a new support request case, say when caller is on the phone. Selecting an email address automatically populates other fields such as caller name, address, phone etc.; thereby reducing time spent trying to log every single detail on the caller.

Apply default agent - This check button gets enabled when a caller email address is selected from the drop-downs.



Checking this button would automatically assign the default agent (specified for that selected caller) to the current case.

The full name of the caller - For new (empty) support request, an agent can easily pick a contact from the address book (e.g., GAL) and that populates all other caller details automatically.

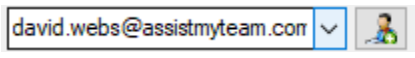
The telephone number of the caller - If the caller exists in the AssistMyTeam Helpdesk Callers list, a telephone number can be specified and it automatically gets listed in this field. If the caller has been picked from the address book (e.g., GAL, AD), this field would also get populated (provided the primary telephone of the picked user is specified in GAL or AD).

The mobile number of the caller - If the caller exists in the AssistMyTeam Helpdesk Callers list, a mobile number can be specified and it automatically get listed in this field. If the caller has been picked from the address book (e.g., GAL, AD), this field would also get populated (provided the mobile number of the picked user is specified in GAL or AD).

The full correspondence address of the caller - This field also gets populated automatically when caller is specified from the AssistMyTeam Helpdesk Callers list or picked from the address book.

The organization/company to which the caller works for - This field gets populated automatically when caller is specified from the AssistMyTeam Helpdesk Callers list or picked from the address book.

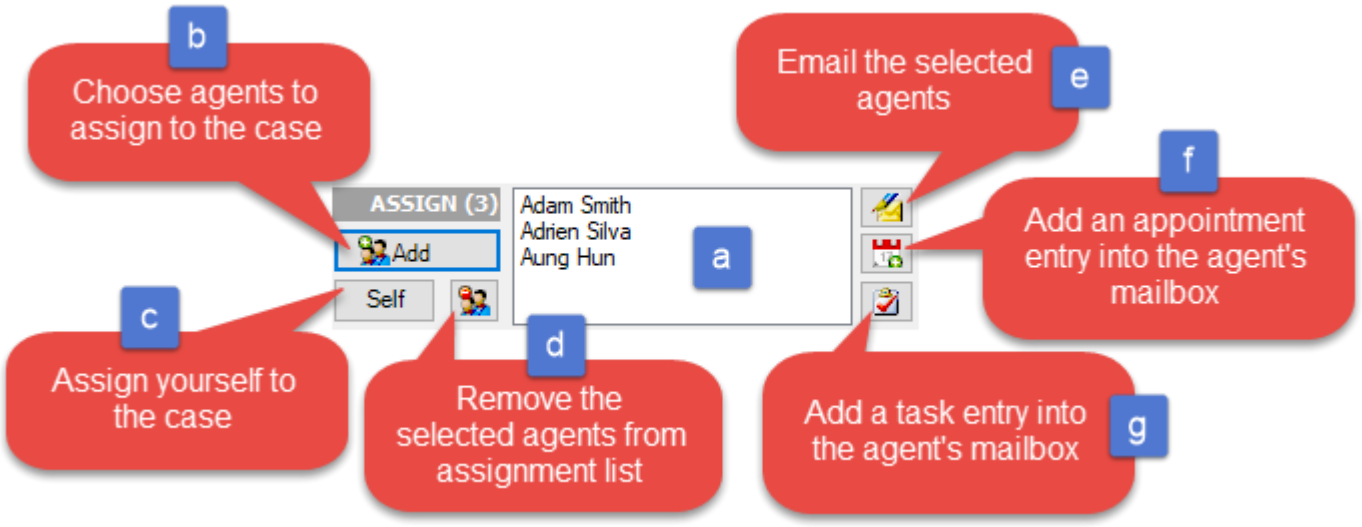
Apply default agent - This checkbox gets enabled when the company field is populated with a value or is selected from the drop-downs.



Checking this button would automatically assign the default agent (associated with that company) to the current support case.

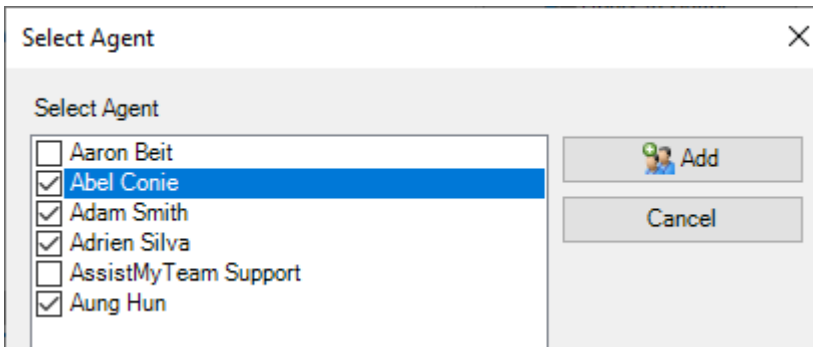
3 Agents Assignment to Case

This is where the agent assignment is performed, either by the managers or by the agent themselves. The add-in can also be configured to automatically assign agents based on certain criteria such as, if there is a default responsible agent associated or linked with the caller, or the chosen problem type, or the domain name of the caller.



a The agents that are currently assigned to the case.

b Select the agents from the list to assign to the case. You can assign multiple agents if needed.



c Click this to assign yourself to the case.

d Remove the selected agents from being assigned to the case.

e Compose and open a new email populated with details on the case using the 'Email to Agent' template (accessible from Outlook > File > Helpdesk Manager > Templates Manager

f Add/update the due date appointment to the mailbox calendar of the selected agents. If successful, it automatically triggers a reminder popup to those agents as well as get added to Outlook today page.

g Add/update the support request task to the mailbox task folder of the selected agents. If successful, it automatically triggers a reminder popup to those agent as well as get added to Outlook today page.

NOTE: Typically, a manager or senior technician assigns the best agents to the case for fulfillment of the service and speedy resolution. Furthermore, in the helpdesk settings, administrator can link and associate an agent to a caller, or to a problem type such that when a new support request email is received, if there is a match between agent and the caller (read as sender), or if a problem type is found in the email subject, the associated agent will get assigned automatically to the case.

Assigned agents then get notified through an automated email. Optionally, the due date of the case is entered into the personal calendar of the agent's mailbox.

4 Response and Due time assignment of the Case

When due and response time is enforced on a case, the add-in makes sure the deadlines are properly followed or else, it would trigger automated alerts to the assigned agents.

Respond by date - duration within which the assigned agents of the case should have responded to the caller for the first time (after the case was logged).

The manager can set an initial response time by manually specifying one after the case was raised, or a default date/time could be set under **AssistMyTeam Helpdesk Manager > Case Options > New Case** tab.

 reset the respond by date to none.

Due Date - The due date field enables helpdesk manager to set a time before which the case should be resolved. There are lot of automatic notifications and reminders options that can be sent to assigned agents when a new due date is specified or updated. For example, when a new agent is assigned, AssistMyTeam Helpdesk sends out notification email informing agent on the due date of their cases. It can also automatically add/update a due date appointment or task to the personal mailbox of the assigned agent so that Outlook handles the reminders to the agent.

 reset the due date to none.

5 Duration Messages of the Case

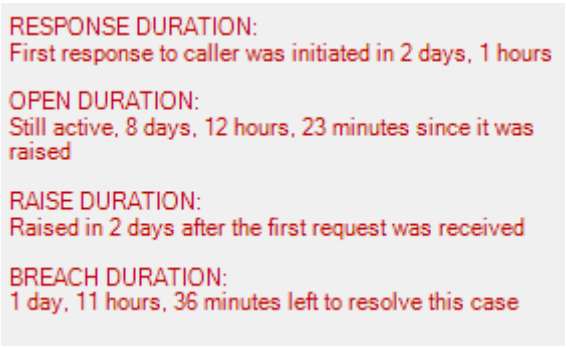
These are measured intervals that are calculated based on the difference between two helpdesk date-time dimensions.

Response Duration - The time taken by the assigned agent to respond to the caller for the first time once the case was raised.

Open Duration - For an ongoing case, it is the interval between the case creation time and the present time.
For a resolved case, it is the interval between the case creation time and case closure time.

Raise Duration - It is the duration between the email received time and the case creation time. In other words, this is the time taken by the agent to raise a case from an email once it is received in the Inbox.

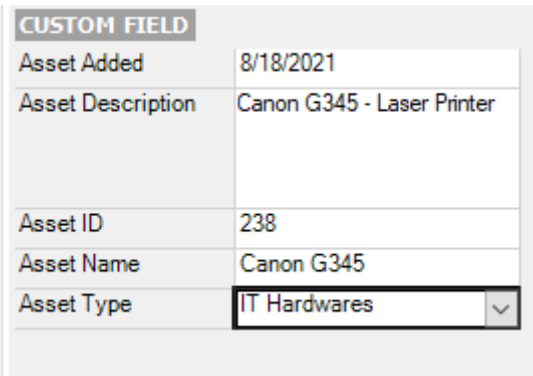
Breach Duration – It is the duration that is left to resolve the case before it is due.



6 Custom Fields of the Case

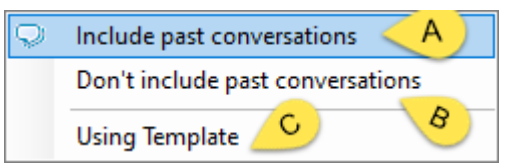
If your helpdesk requires to collect more in-house information on the case, manager can add any number of additional fields from **AssistMyTeam Helpdesk Manager Add-in > Custom Fields** panel. Supported data types for the custom fields are: *Text, Number, Currency, Yes/No, Date/Time, Note or drop-down List*.

All the deployed custom fields would be then available in the case form for input. Data collected from custom fields are available for use in Reports Generator and statistics.

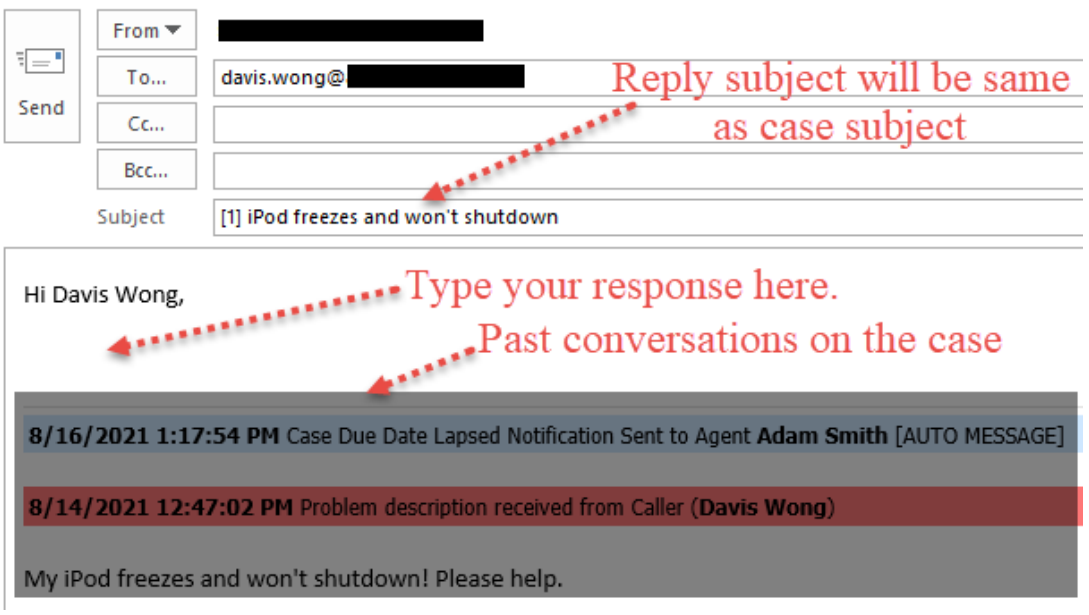


7 Reply to Caller of the Case

Compose and send a reply email to the caller of the selected case. There are 3 different types of reply that can be made to the caller.



A Make a reply to the caller by including all the past conversations on the case, including embedded/inline images. The add-in will automatically build the reply email with subject deriving from the case subject and salutation (e.g., Hi CALLER) embedded on the top most part of the body, and preceded by 2 empty line breaks which is where the agent can type in the response. And the bottom section in the body is that of the past conversations of the case.

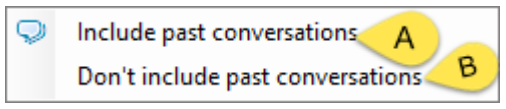


B Make a reply to the caller with no past conversations i.e., with only simple salutation. The subject of the reply will be derived from the case subject and the add-in will make sure; the case number ID is present in it for tracking purpose.

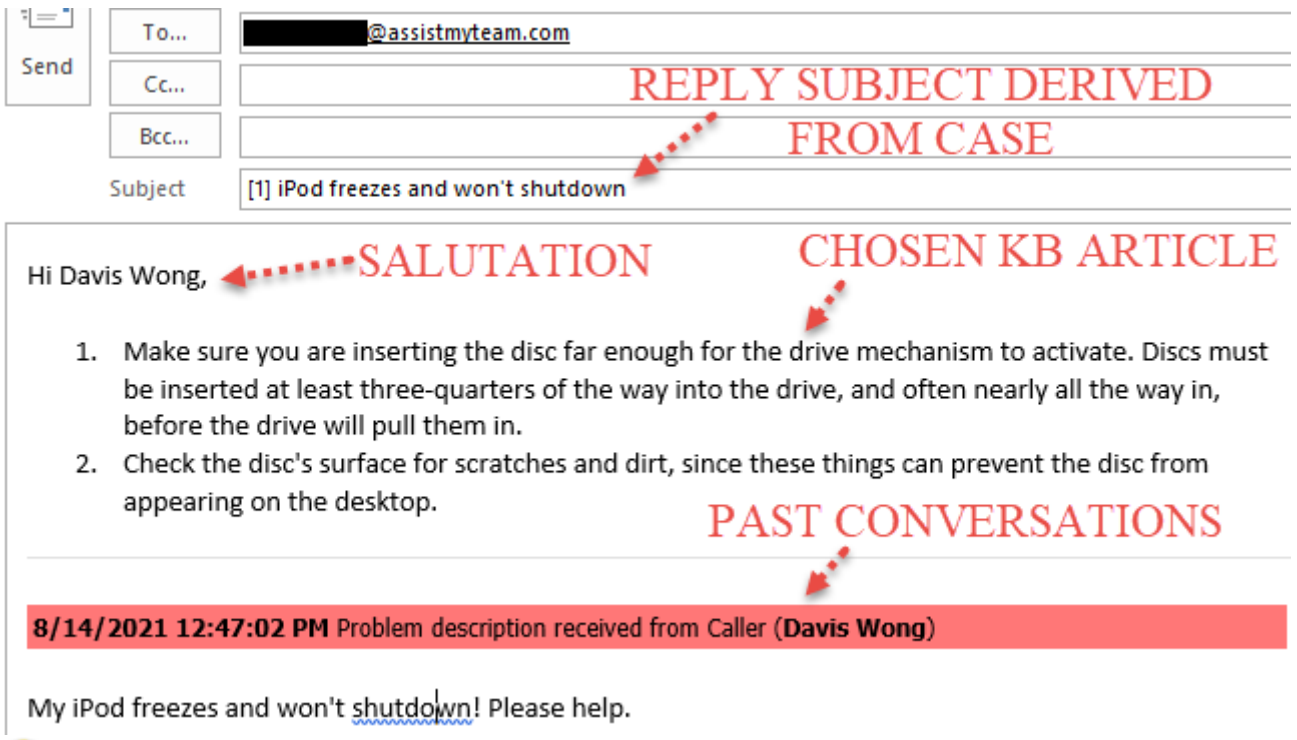
C Make a reply to the caller using a customized email template. This template '**Reply to Caller**' can be accessed from *Outlook > Helpdesk Manager > Templates Manager*.

8 Reply to Caller of the case with a KB article

Choose a KB article and embed it to a reply email to the caller. There are two different ways you can make a reply to case with a chosen KB article.



A Make a reply to the caller with a KB article and include all the past conversations on the case, including embedded/inline images. The add-in will automatically build the reply email with subject deriving from the case subject and salutation (e.g., Hi CALLER) embedded on the top most part of the body, and preceded by the chosen KB article. And the bottom section in the body is that of the past conversations of the case.

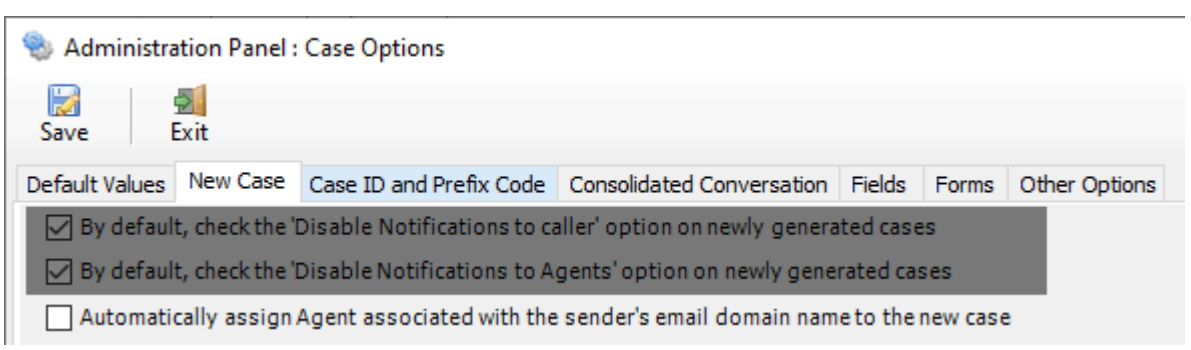


B Make a reply to the caller with a KB article with no past conversations of the case i.e., with only simple salutation. The subject of the reply will be derived from the case subject and the add-in will make sure; the case number ID is present in it for tracking purpose.

9 Disable Case Alerts to Caller and Agents

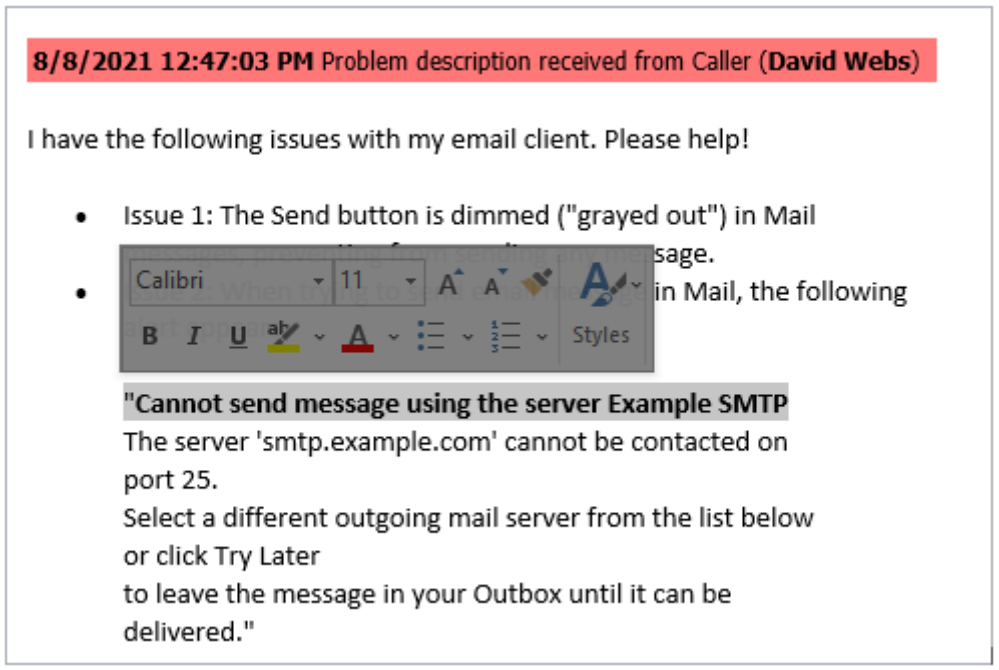
These options allow for selective disabling of auto alerts that are available for sending to callers or agents. Sometimes, on specific cases or caller or assigned agents, you may want AssistMyTeam Helpdesk not to send auto notifications on the activities or events of the case. So instead of disabling a particular auto-alert at the global level, you can choose to disable auto-alerts on per case. Just check the options 'Disable Notifications to Caller' or 'Disable Notifications to Agents'.

You can also set AssistMyTeam Helpdesk to automatically check both these options on newly raised cases from **AssistMyTeam Helpdesk Manager > Case Options > New Case** tab.



10 Edit Conversations of the Case

Enable 'edit mode' for the consolidated conversations field. That is, if this is enabled, it will allow the agent to make changes to the existing conversations or add new content manually. This will also force Outlook to make the formatting, insert attachments options available in the toolbar. By default, the conversations box is locked.



11 Mark Case as Complete

If the selected case is ongoing and once it is resolved, you can click this button to mark it complete. Email notification to the caller about case being closed may follow automatically, if enabled.

12 Save Case to DB

Press this to save the changes made to the case such as change in the metadata fields, or drop downs or the conversations. This will then be saved to the database.

13 Remove Case from DB

Permanently remove the current case from the Helpdesk database. You will be prompted with a confirmation. WARNING: This action is irreversible and so be very sure what you are removing.

14 Save Case as Draft

Press this to save the current opened case as a draft item your Outlook, so that you can edit it again later on without actually committing the changes to the helpdesk database. This may come handy in situation where you are waiting for more inputs from the caller, or you are typing in a long description of the problem and you only want to commit to save the changes to the database when you are fully ready.

At any time, you can click 'Save to DB' button to commit the changes back to the helpdesk database.

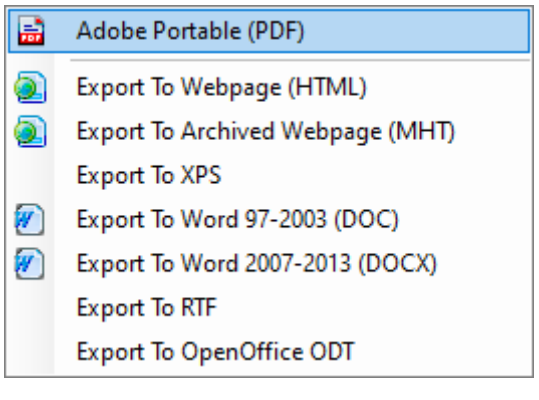
15 Make KB from the Case

If the current case contains any useful information that helps in solving a commonly recurring problem, you can use it as a source to create a new KB article in the helpdesk for future use. In fact, any support case is eligible to become flagged as a KB Article. An agent recognizing a repetitive support issue, can easily flag a resolved case as a knowledge article. Thus, it acts as an effective knowledge sharing medium, boosting support productivity by leveraging collective knowledge and providing invaluable KB Articles to support techs in a snap! It also helps in improving the average 'First Call Resolution' timing significantly, as agents find resolution to problems quickly.

To learn more, refer to the ‘Creating a new KB article’ section.

16 Export to file

Export the current case to PDF document file. You can also export to Word Documents, HTML, plain text etc.



You can control what case data are included in the files by customizing the '**Print**' template under *AssistMyTeam Helpdesk Manager > Templates Manager.* For example, place the variable **'CASE_BODY'** in the Print template such that the exported file (e.g., pdf) contains all the consolidated conversations (body) from the case item including inline images.

17 Print Case

Click this to print the current case using the **'Print'** template (as defined under *AssistMyTeam Helpdesk Manager > Templates Manager*). This will show you the print dialog option, where you can customize the layout, paper size etc.

18 Discard and Exit Case

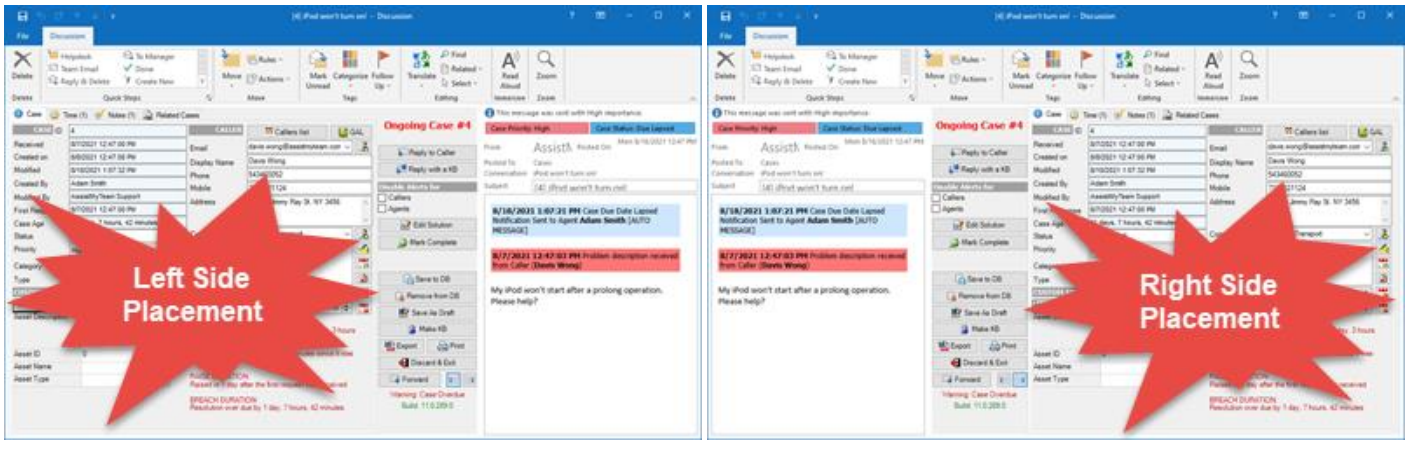
Press this to cancel any changes made to the case and close the case window from Outlook, without committing any changes to the helpdesk database.

19 Forward case

Forward the selected case to a recipient or stakeholder.

20 Form Orientation

Change the orientation or placement of the case form in either **left** or **right** side of the conversations box of the inspector window of the opened case.



21 Subject of the Case

The subject of the case. You can customize it to make the problem quite obvious at first glance.

22 Case Conversations

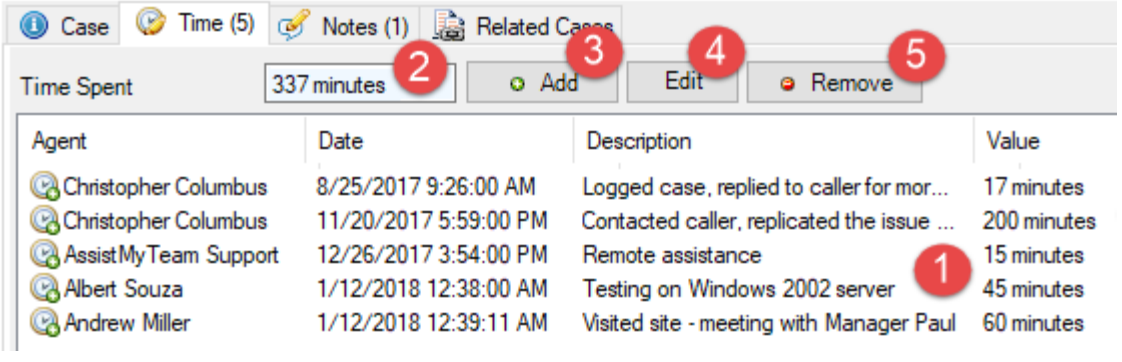
Most cases cannot be closed within a single e-mail and response. Feedback from the caller and suggestions from other stakeholders often occur over multiple request-response emails. Moreover, different members from the support teams may provide resolutions during the course of the case. In a practical scenario, a case might have various e-mail versions of the resolution steps, making it cumbersome to get a complete picture of responses and resolution.

In this case conversations box, the helpdesk add-in captures the complete course of the conversations chronologically, from all email communications received or sent (including those automated notifications sent to caller and agents in due course). The end result is a consolidated view where all the responses and replies are collated together. Redundant and repeated conversations are filtered out to present only the relevant communications.

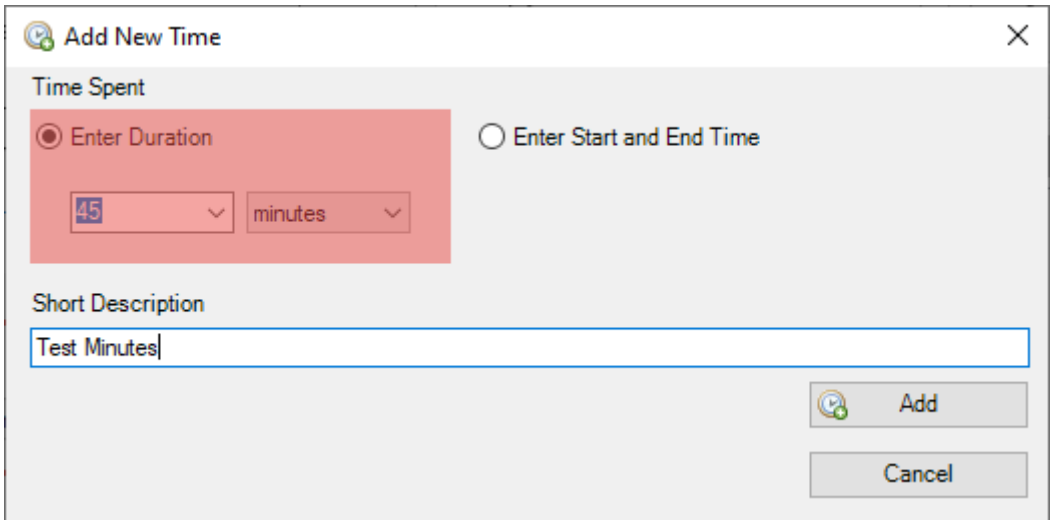
This eases the task of the helpdesk and minimizes repeating what has already been done, while keeping support team members to stay on the track. Another advantage is it allows the agents and managers to quickly glimpse through the conversations and get a complete overview on the responses in chronological order and resolution applied to the case. This is hardly possible if you were to refer to multiple email responses and on top of it, the efforts required to navigate multiple Inboxes and Sent Items and scan for the right emails.

7.2 Time Spent on Case

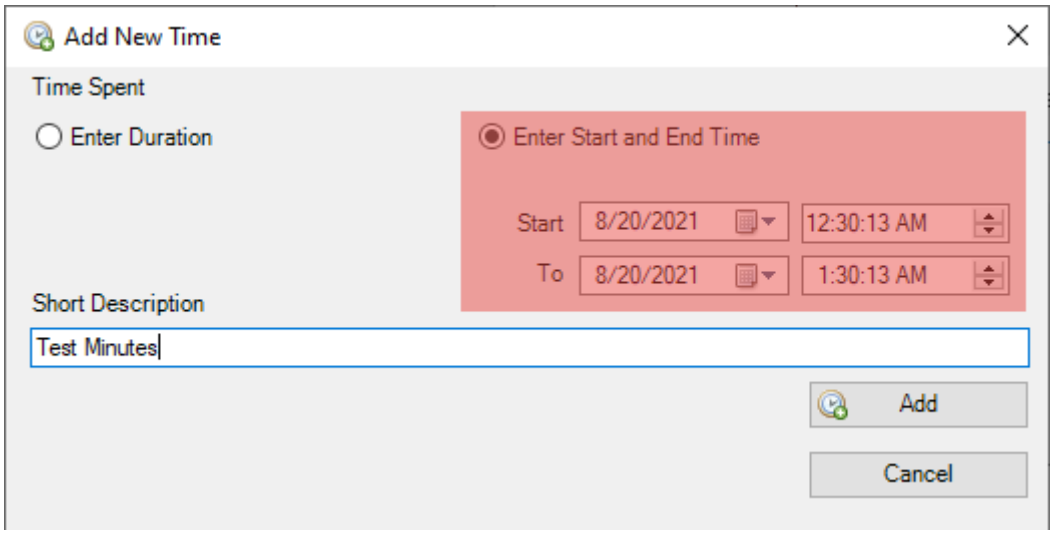
The Time Spent section lists all work sessions performed on the case by the agents and managers. This time spent field can be made optional or mandatory before marking the case as closed. By default, it is optional. Also, to calculate cost for billing purpose in reporting and statistic tools, Helpdesk needs to have a valid work time from the assigned agents.



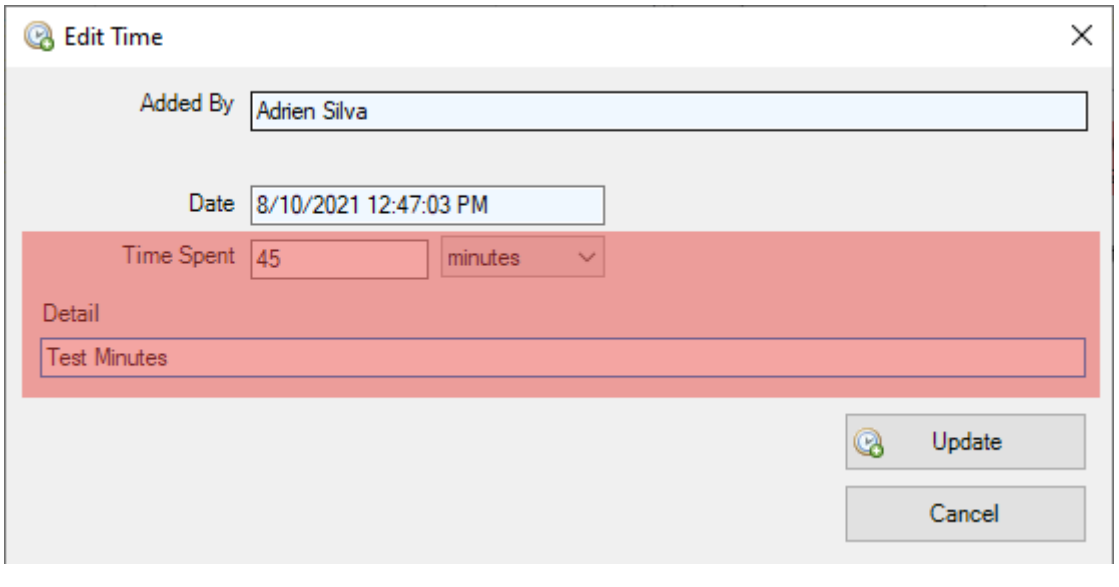
1. List of all time spent entries made by agents assigned to the case when working to resolve it. Apart from the time spent value (either in minutes or hours), each record in the list shows the agent's name who made the entry, the date and time etc.
2. Shows the total time spent (either in minutes or hours) made so far on this particular case.
3. Enter a new time spent value to the case. A pop-up dialog allows you to enter a duration (in minutes or hours), as well as description of the work done.



You can also enter a start and end time so that the duration is automatically calculated.



4 Edit an existing time spent entry. You can also modify the time spent value and description. The agent and time stamp are however, read-only.

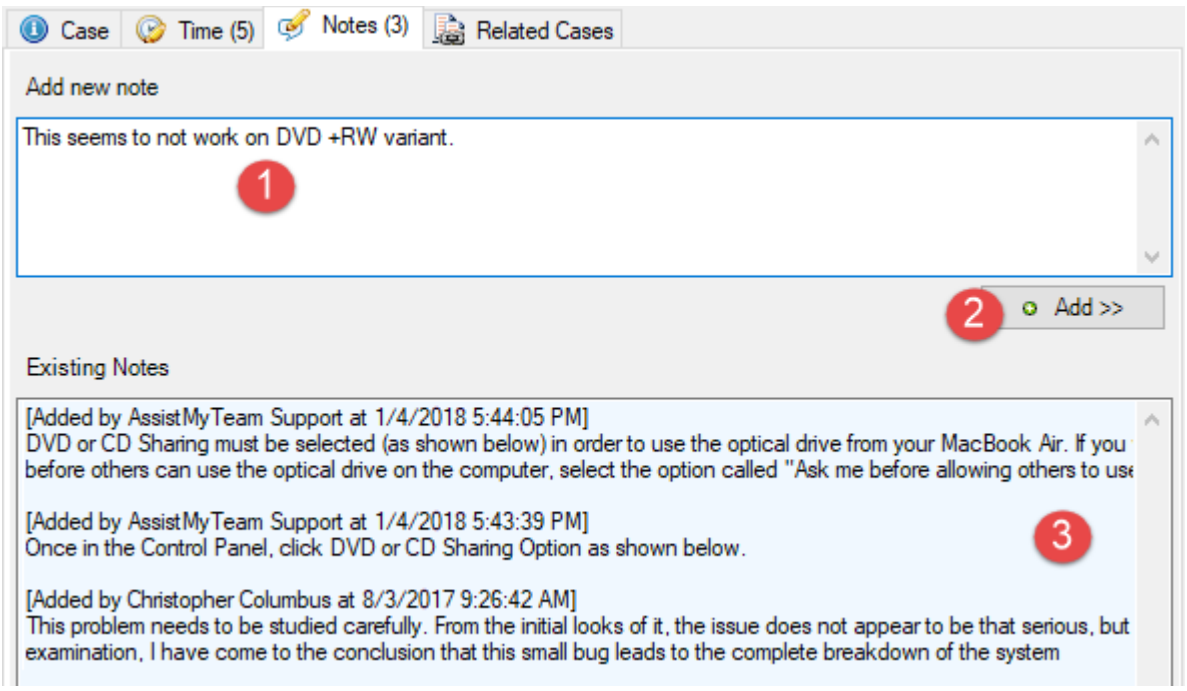


5 Remove the selected time spent entries from the case.

NOTE: you need to save the case in order for the removed entries to be permanently reflected to the case.

7.3 Add Notes to Case

The notes section enables the agents and managers to add private notes to the case for internal use.



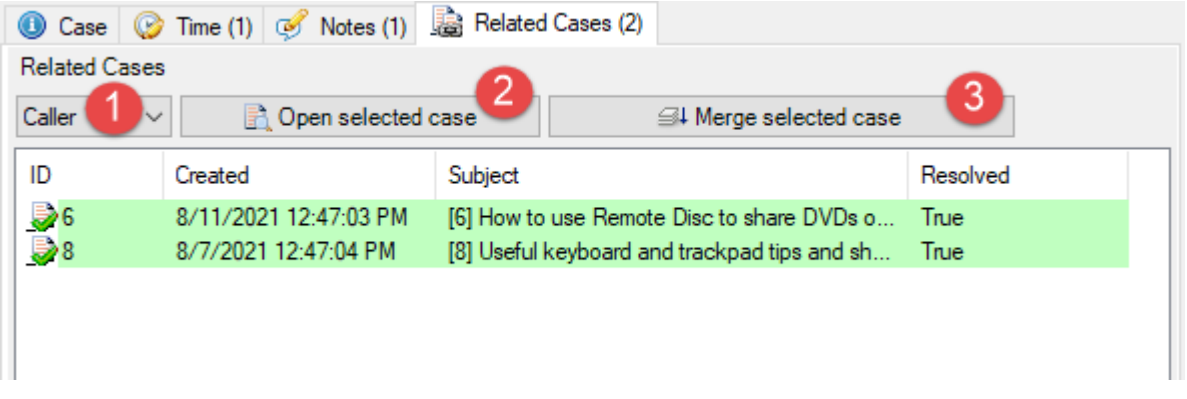
1 Enter the new note that you would like to add to this case.

2 Click to add the new note to the existing notes of this case. Each note that is added to the case bears a header title that has the agent's name and the date and time the note was added.

3 Existing notes of this case. Each note is separated by an empty line.

7.4 Related Cases

The **'Related Cases' tab** lists all the ongoing and resolved cases logged for that particular caller, or company or email domain so the responsible agents can have a panoramic view of all past problems history.



1. Choose a filter (caller, company or domain name) that will be used to search for matching cases.

2. Open the selected case in its own case form (e.g., inspector window). Alternatively, you can double-click the case entry to open it.

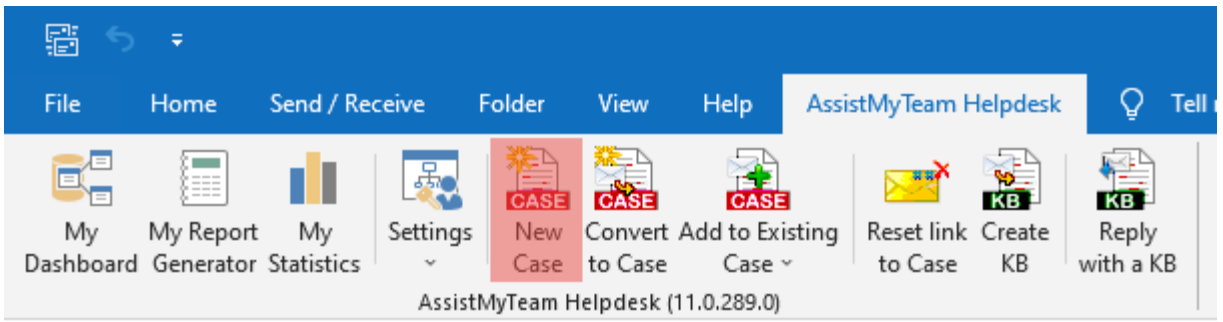
3. Merge the selected case with the current case. Sometimes, a caller might contact you through separate emails or channels regarding a particular issue. The same issue might be logged as a case by a different agent not knowing an existing one already exists. To avoid duplication and conflicts, you can such cases into one and keep the communication streamlined.

   The merge action is irreversible, and causes the following things to happen:

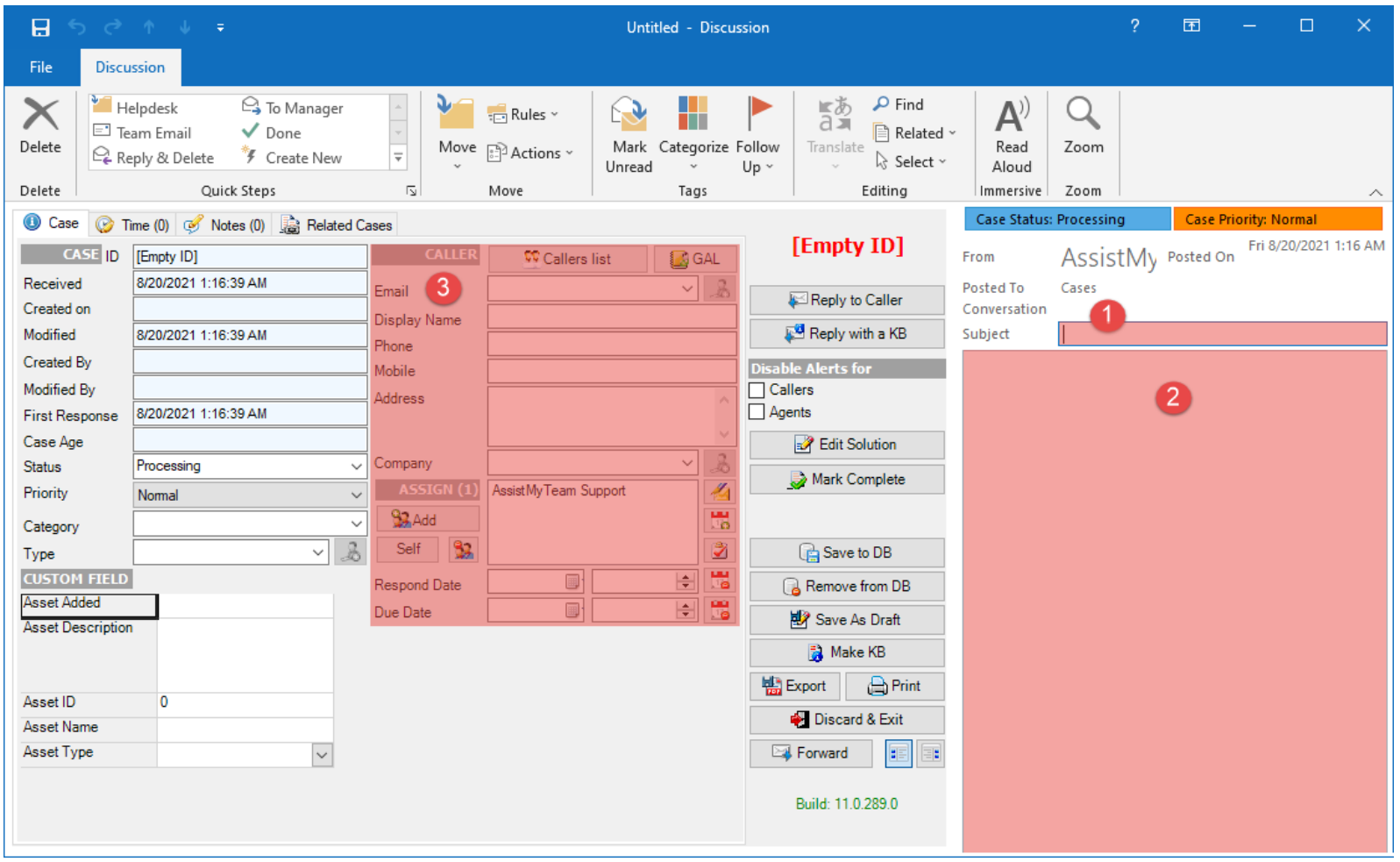
   a) One of the cases becomes the primary case (you get to choose).
   b) All conversations from the secondary tickets are moved into the primary case.

8. Raise a new empty Case

Sometimes you might need to raise new case based on the issue reported by your caller through phone calls. In such situation, you can press the **'New Case'** button located in the helpdesk toolbar to raise a new empty case and feed the information including the issue description into the form.



Within the empty case form, the first step you typically would like to start is by entering a short summary in the subject to enable for quick identification and then describe the issue in detail in the body field. You can insert supporting files as attachments (similar to how you attach a file when composing an email in Outlook).



1. Enter a brief summary of the issue reported by the caller on the phone in the subject field.
2. Enter detail description of the issue on the body field.
3. Feed the caller's name, email address, phone number, company etc. into the caller information section of the case form.

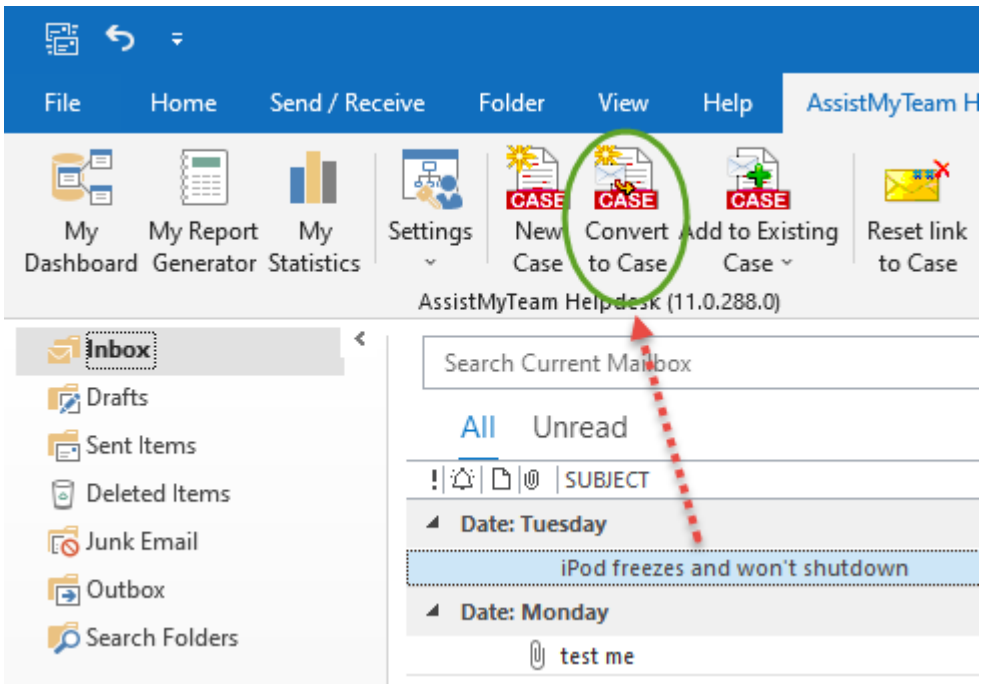
Once the required details are entered into the form, click the '**Save to DB'** button to generate and assign a new ID to the case. You can then provide this ID to your caller on the phone. Additionally, the add-in will also automatically send a confirmation email alert to the caller.

9. Raise a new case from an email manually

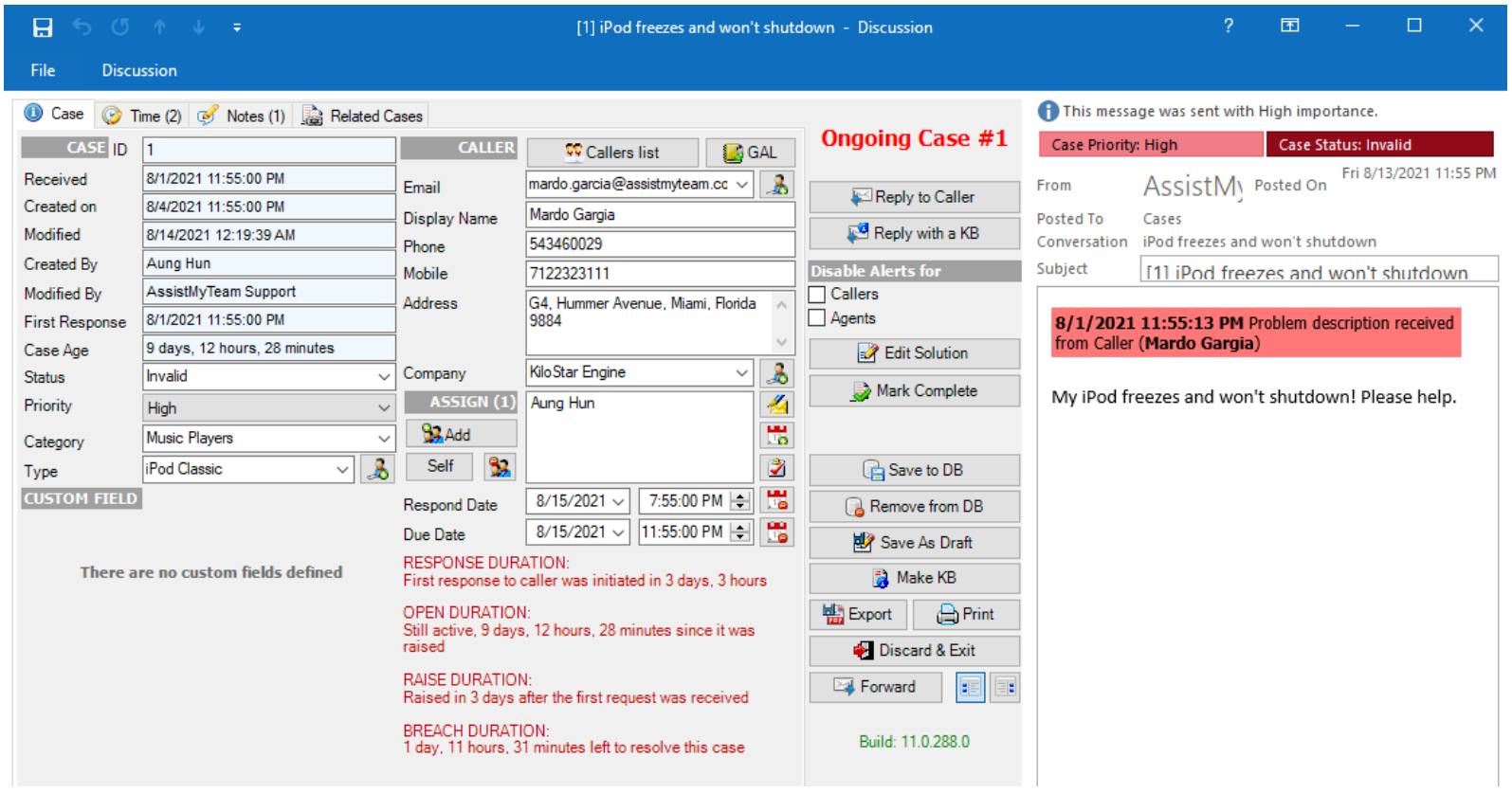
Support cases can be generated from diverse source such as incoming emails, appointments, tasks or phone calls and are available instantly to all members of the helpdesk team in Outlook.

9.1 Convert email, appointment or task item to a case

In your Inbox or calendar or task folder, select that particular email, appointment or task item and press **'Convert to case'** located in the helpdesk toolbar to raise a new support case.



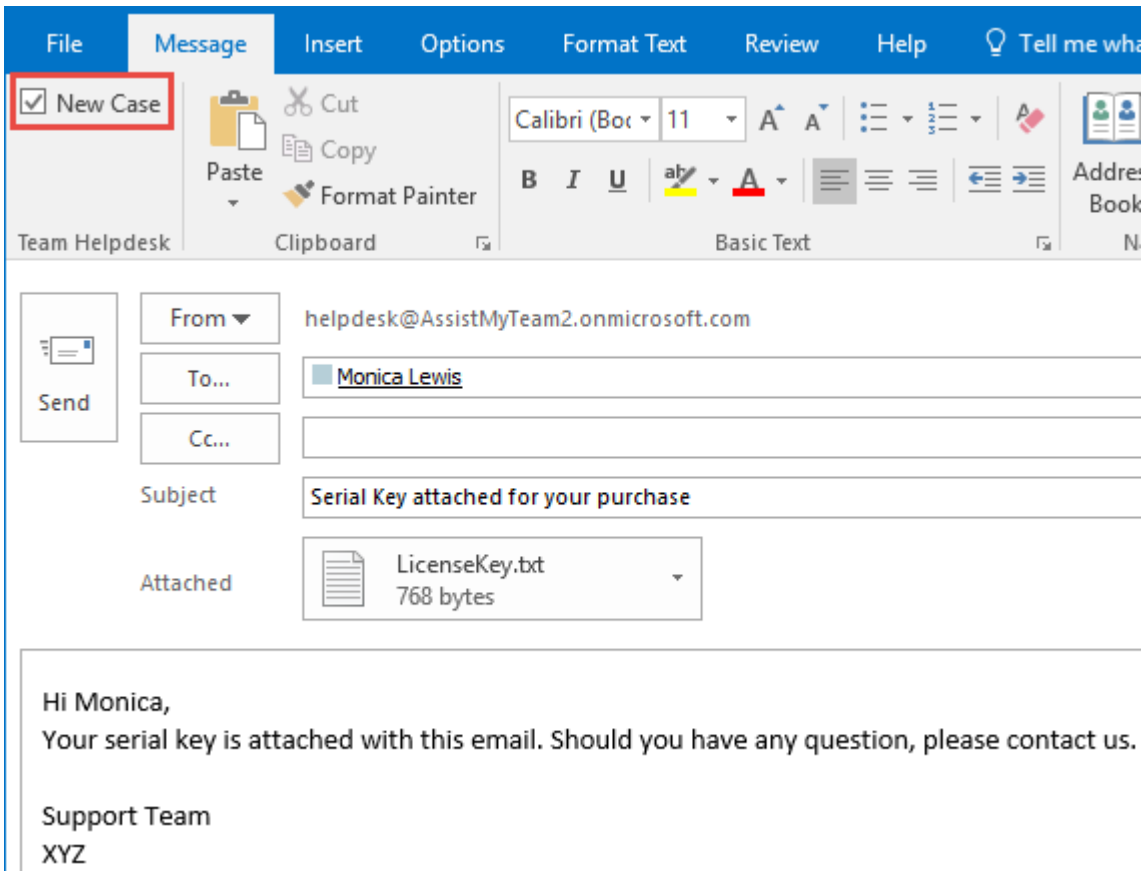
You can then add further details (such as the classification of problems the request falls into) to the case form.



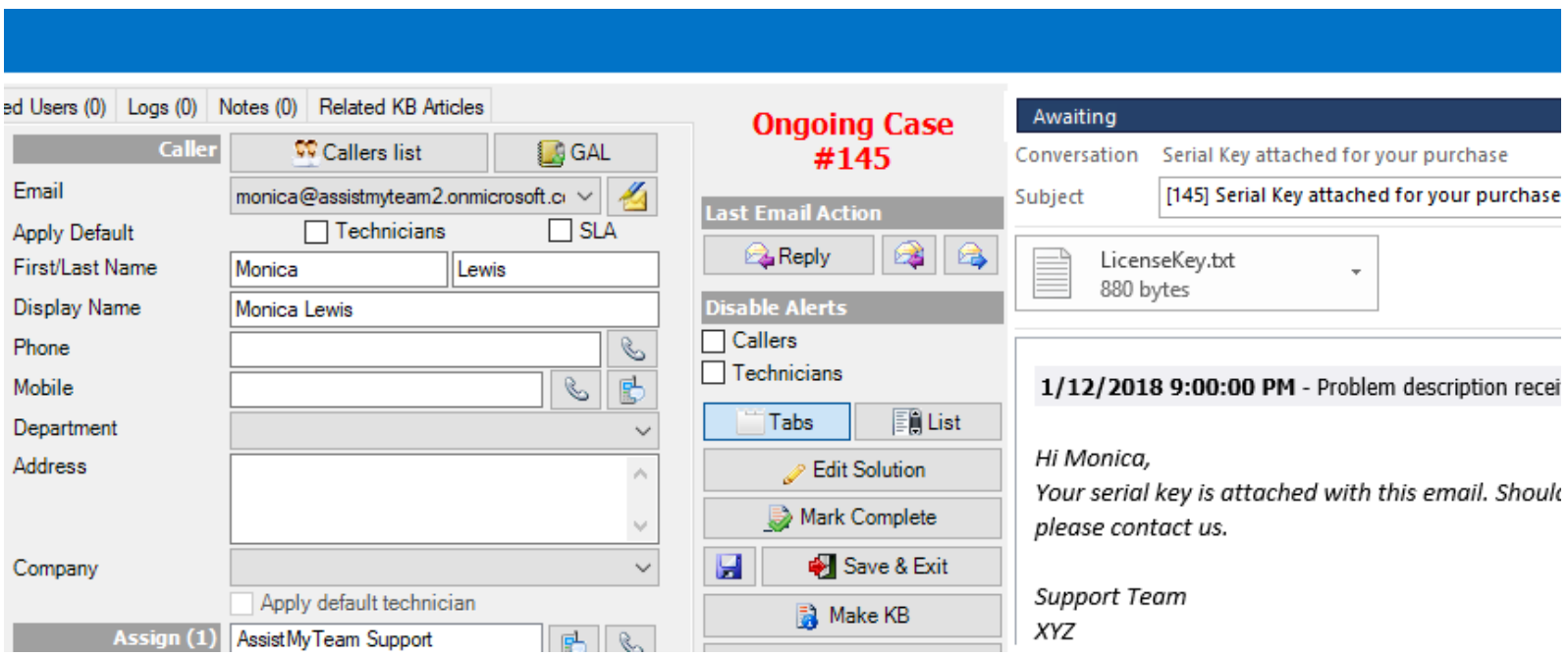
9.2 Raising a new case after sending the initial lead/contact to the caller

Sometimes, the helpdesk team may need to initiate or start a case without a request received directly from a user. For example, you send a user the serial number for a software they have purchased not because of a request they sent in. So, typically, in such scenario, you are initiating the communication by sending them an e-mail that says “Your key is xxxxxxx and here is a link to the software”. At the same time, you want a case to be opened based on that email sent to them.

To accomplish this, a check option **'New Case'** is provided in the compose window of the email. So, when you check this option, and press 'Send' button, the email will be sent successfully to the caller/contact. At the same time, AssistMyTeam Helpdesk will raise a new case based on that email, with populating the caller details and the description of the problem/email.

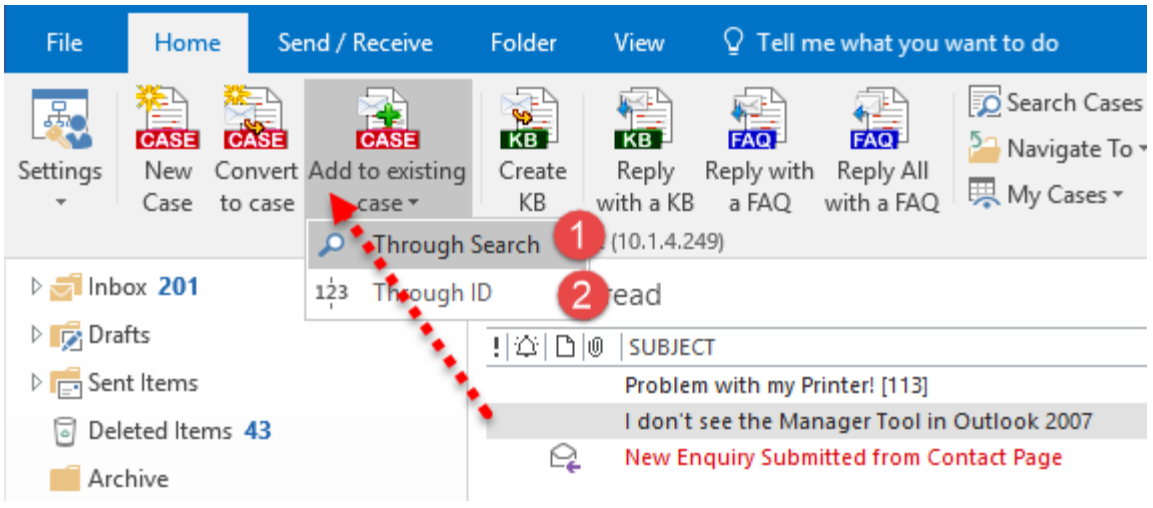


A new case is raised based on that email sent to the caller/contact.



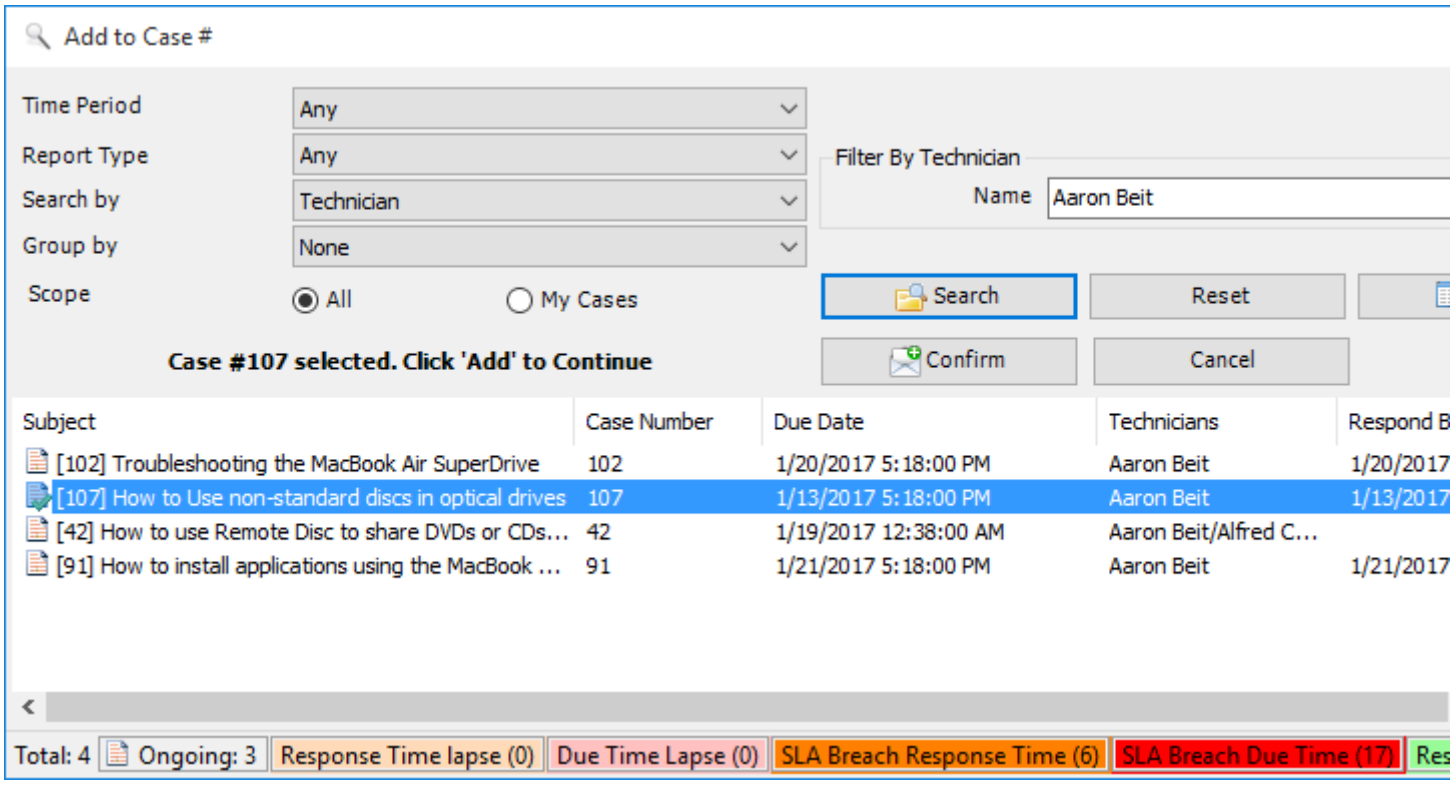
10. Add an email to a case

If you want to add an email to an existing case, click '**Add to existing case**' button available in the helpdesk toolbar in your Inbox. This is useful if the caller emails the helpdesk multiple times on different threads but on the same issue or case. You can manually add such related emails to an existing case in a click.

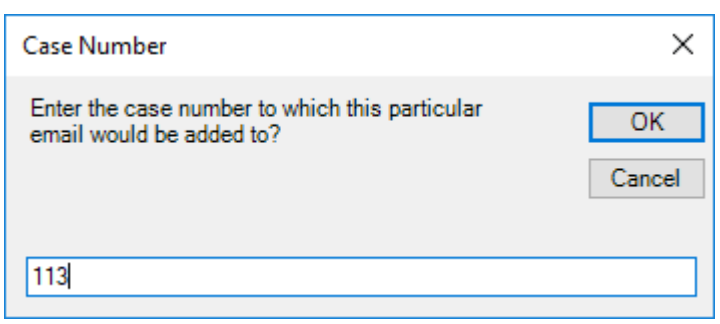


'Add to Existing case' is available in two variants:

1. **Through Search** - The selected emails will be added to the chosen case in the search panel. If you don't know the case ID to which you want to update the emails to, use this method to search for cases that meet certain criteria and from which you can choose one quickly.

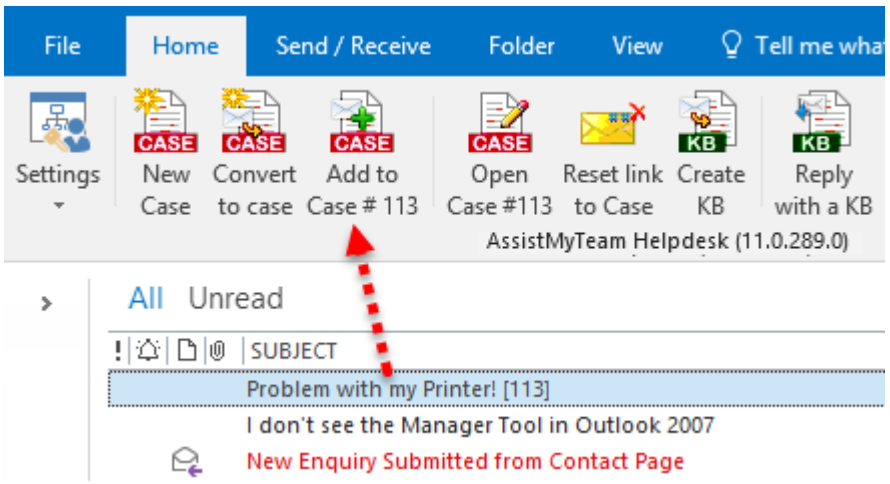


2. **Through ID** - If you already know the Case ID to add the selected emails, you can enter it to update quickly.

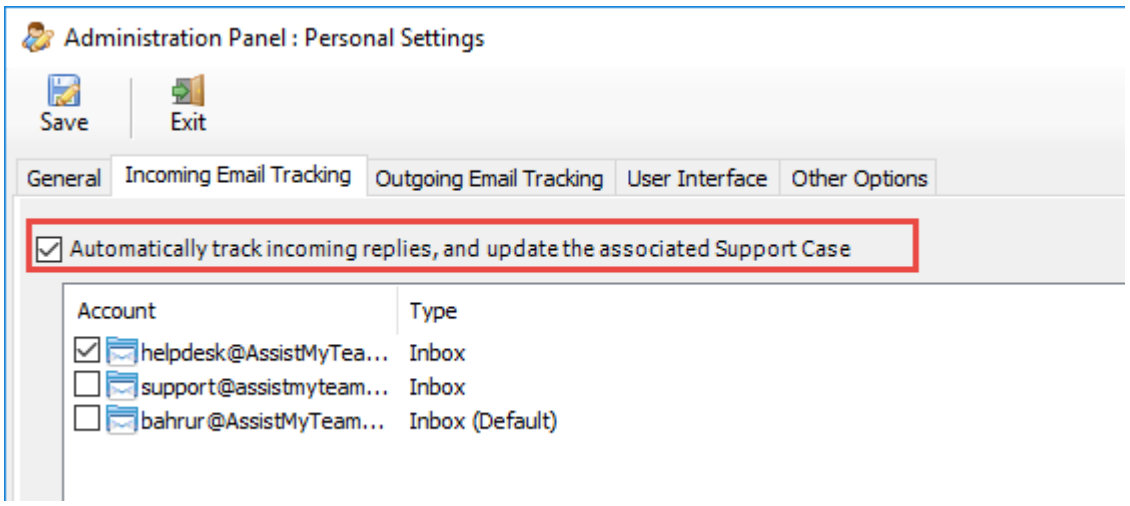


11. Add replies to associated case

If the emails from the caller already have a case ID embedded in the subject, you can press '**Add to Case #**' button and the add-in will accordingly update the case with no further input required from you.



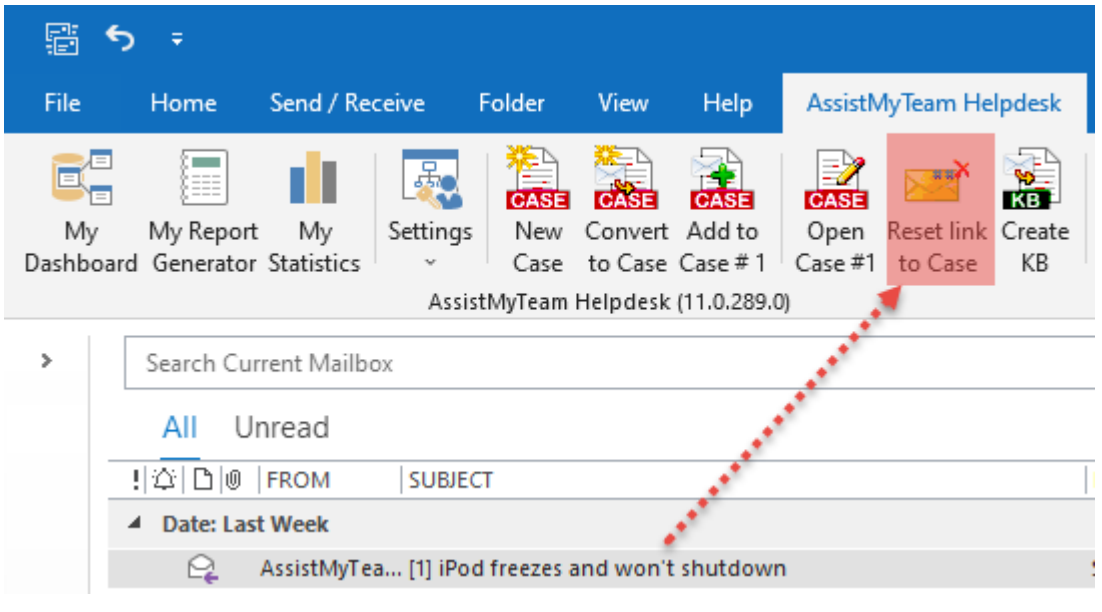
Instead of manually updating the case with replies to existing case from callers, you can automate this process so that the agent add-in will selectively monitor incoming emails and only process those replies that have embedded case ID in the subject and subsequently updates the associated cases. You can enable this automation from **Outlook > AssistMyTeam Helpdesk toolbar > Settings > Personal Settings > Email Tracking – Incoming** tab.



By default, the add-in only tracks and processes the emails associated with existing cases from your primary mailbox. However, if you receive emails from callers to other mailboxes in your Outlook, then you must specify those mailboxes too. Enabling this would force your AssistMyTeam Helpdesk Agent add-in to look for incoming/outgoing emails in those mailboxes too.

12. Remove link to case from an email

This button will be visible when you select any email that has a case ID (with or without Prefix code) in the subject. Clicking it will remove the references of the case from that email. You can then raise a new case from that email.

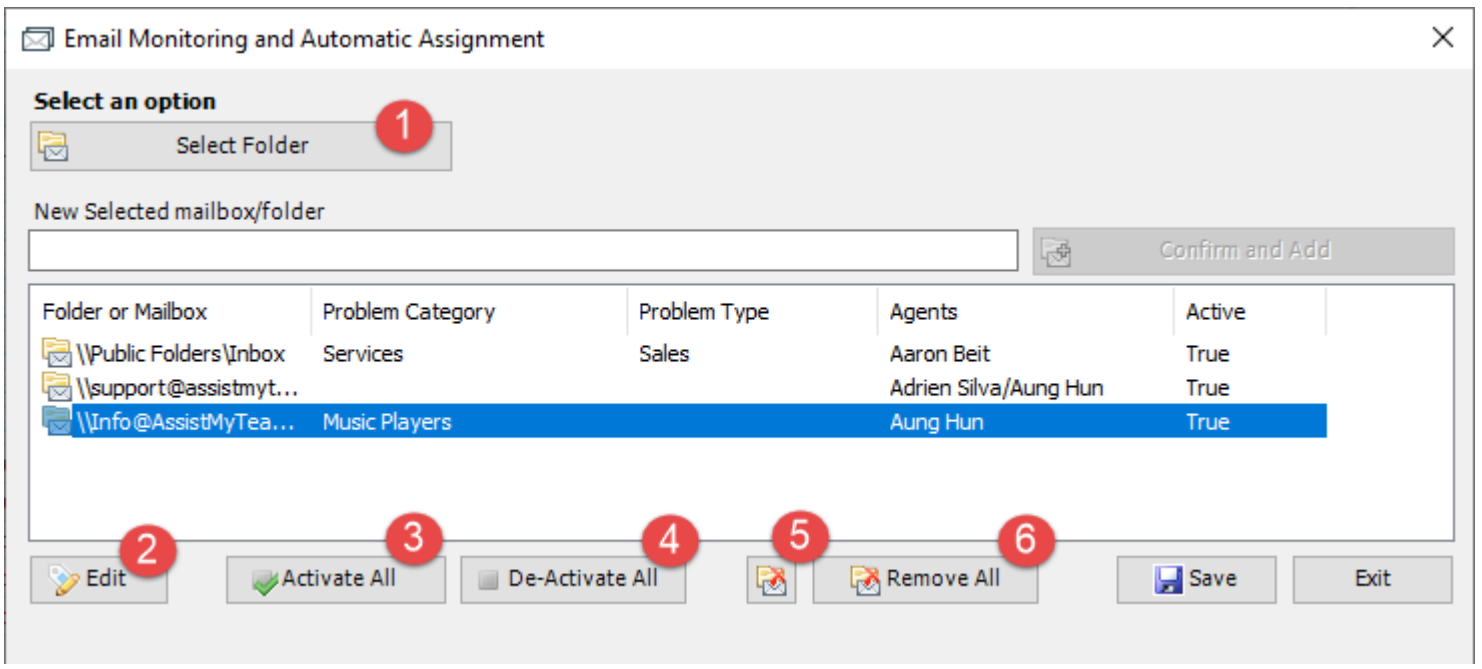


13. Automatic Case logging in Inboxes

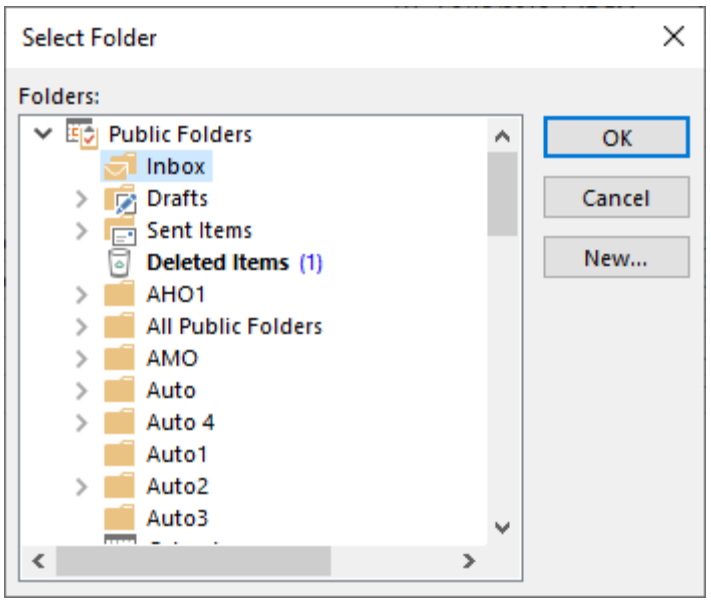
Many organizations believe e-mail is a highly efficient way to have their customers submit service and support requests. Your customer writes in the problem, presses send, and within seconds, it is in support mailbox of your helpdesk account. But the reality is that nothing happens until someone reads it, creates a case from it (this usually involves cutting and pasting from the e-mail), and assigns it to an engineer or agent for resolution. Because there is both manual labor and personal attention involved, the process can result in delays, support requests falling into the cracks, errors in transcription, and unhappy clients. And unfortunately, this can become a barrier in the helpdesk main goal, which is to provide timely response to the caller. This is a nightmare scenario for helpdesk team.

Fortunately, this is easily avoided in AssistMyTeam Helpdesk. As it is integrated seamlessly with your Outlook email client, there is no requirement to cut and paste information from the email to the support case. Even better, there is no need to manually process each email. You can configure your helpdesk add-in to monitor any number of mailboxes and email folders in your Outlook such that it can intercept incoming emails and automatically generate cases out of the emails, all instantly i.e., as and when emails hit the inbox. With this kind of setup, you are freed from having to monitor inboxes manually every now and then.

Additionally, you can extend your helpdesk to even assign default agents to newly logged cases on the fly, based on the linked relationship between agents and the prefilled fields such as sender, domain name or problem type. This automates the case logging and assignment entirely on its own. The generated cases are then stored in the helpdesk database making them available to all members of your team for collaboration. Any file attachments from the original emails will be automatically attached to the case; making distribution of inbound requests simple and informative. This way, all support submissions are captured and centralized in order to execute efficient and effective customer service.

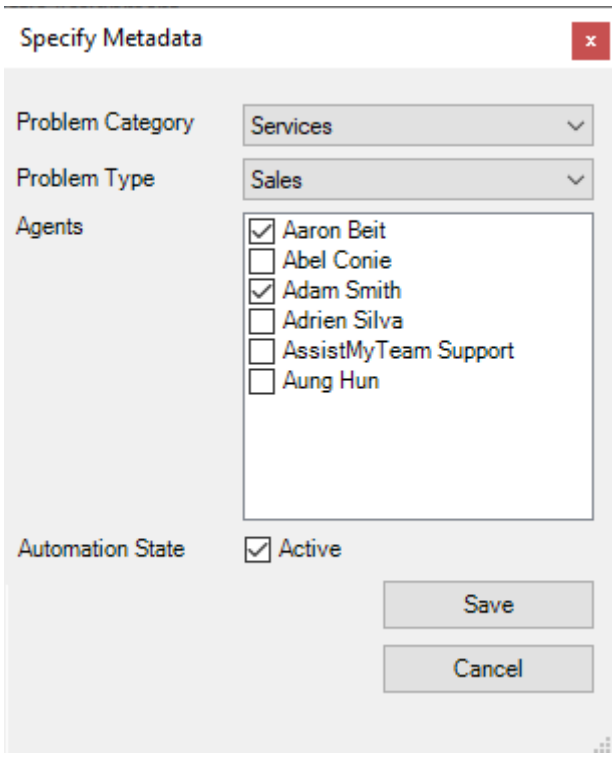


1 Choose an Inbox or email **folder** (such as an Exchange folder or Public Folder) that will be monitored by the helpdesk add-in to and raise new cases from incoming emails automatically.



A 'Select Folder' dialog box allows you to choose the Inbox folder from your Outlook. And then click OK. Now click 'Confirm and Add' to the monitored list.

2 Click this to customize the metadata for the automation, such as specifying a default category, type, agents - new cases will take.



Lastly, you can enable or disable the case automation state for the particular mailbox account or email folder. You may want to disable the automation process temporarily on a particular mailbox or folder if for instance, a maintenance or migration is planned.

3 Click this to activate all chosen Inbox folders for automation.

4 Click this to de-activate automation from all the chosen Inbox folders.

5 Remove the selected Inbox folder from the automation list.

6 Remove all Inbox folders from the automation list.

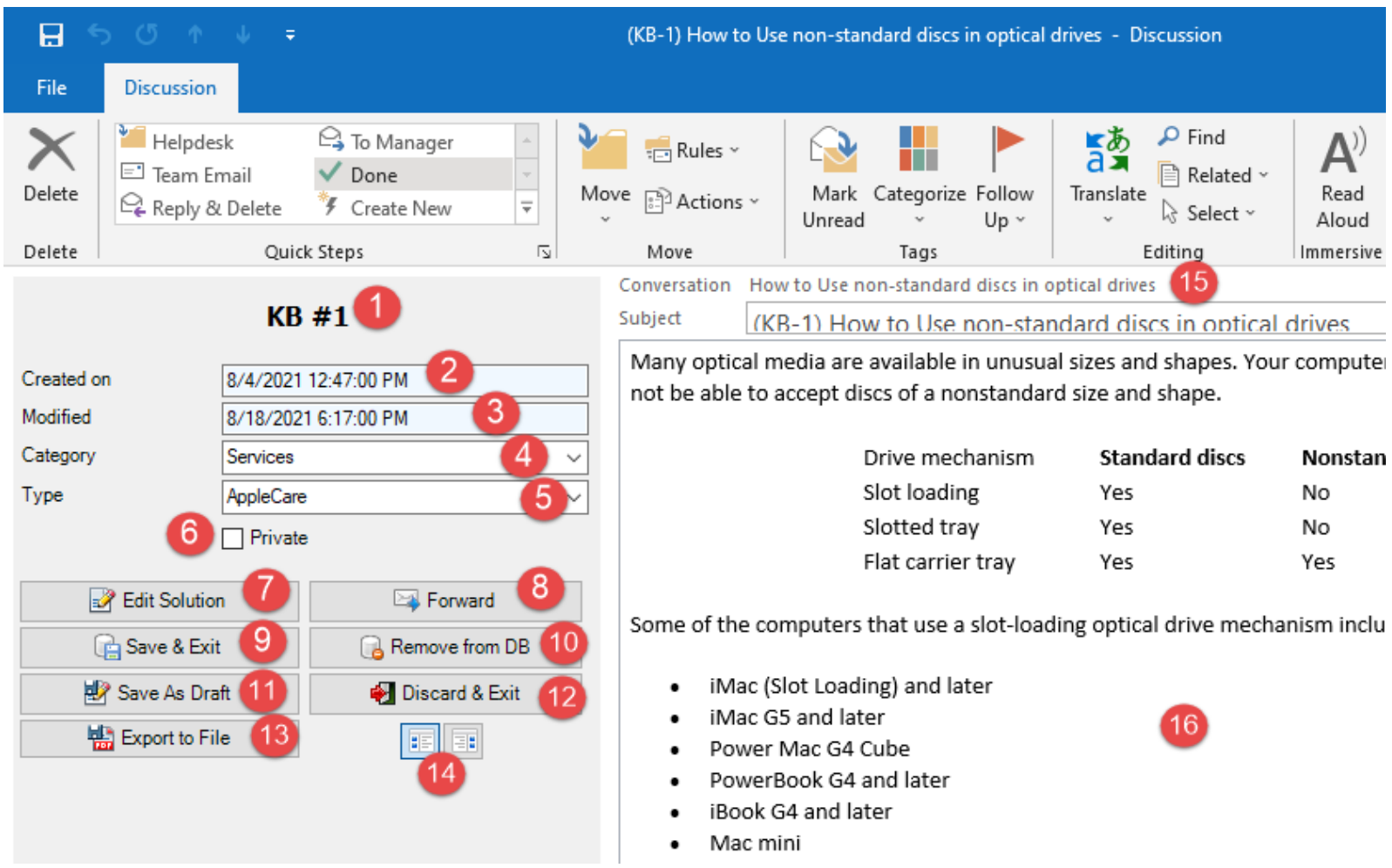
14. Knowledge Base

The inbuilt knowledge base in Helpdesk allows agents to document best practices and solutions to common problems so that they can be used when replying to time-consuming and repeated queries. Any support case is eligible to become flagged as a KB Article. An agent recognizing a repetitive support issue, can easily flag a resolved case as a knowledge article. Thus, it acts as an effective knowledge sharing medium, boosting support productivity by leveraging collective knowledge and providing invaluable KB Articles to support techs in a snap! It also helps in improving the average "First Call Resolution" timing significantly, as technicians find resolution to problems quickly.

ID	SUBJECT	CATEGORY	> TYPE	CREATED BY	CREATED ON	PRIVATE
1	(KB-1) How to Use non-standard discs in optical ...	Services	AppleCare	Abel Conie	8/4/2021 12:47:00 PM	False
5	(KB-5) The drive doesn't accept any discs	Music Players	iPod Classic	Adam Smith	8/3/2021 12:47:00 PM	False
4	(KB-4) Apple Portables: How to disconnect the M...	Notebooks	MacBook	Adam Smith	8/13/2021 12:47:04 P...	False
2	(KB-2) MacBook Pro: How to remove or install the...	Notebooks	MacBook Pro	Aaron Beit	8/1/2021 12:47:04 PM	False
3	(KB-3) MacBook Pro: How to install memory	Notebooks	MacBook Pro	Aaron Beit	8/7/2021 12:47:04 PM	False

14.1 Understanding the Article form in Outlook

It is very easy to use the knowledge base in Outlook. A Question-and-Answer format is used to intuitively display Knowledge Base Articles. Each Article may have any number of file attachments associated, rich-text elements, and hyperlinks to other web pages. All articles are tagged with a related problem category and problem type, so it is easy to find a particular resolution at time of needs.



1 KB ID

The unique ID that is identifies the KB article in the helpdesk database.

2 Created On

Displays the date and time the knowledge base item was created.

3 Modified

Displays the date and time the knowledge base item was last modified.

4 Category

Drop down list of all available problem categories defined in AssistMyTeam Helpdesk problems list. You can select a value from the list to mark the category to which the current knowledge base item belongs to.

5 Type

Drop down list of all available problem types (sub-categories) of the selected problem category. When you select from the problem category drop down, another tier of problem type lists will be loaded in the type drop-down control. These nested tiers of categories/types are complete customizable to your organization's business model and act as somewhat of a guiding decision tree when you search for a particular knowledge base article.

6 Private

Check this option to set the KB article as 'private'. Private KB articles can be set to not publish to the online KB module of Customer Web Service (CWS) site. Further, you can also set AssistMyTeam Helpdesk to hide the private KB articles from showing up in the **'Reply with a KB'** dialog panel. You can control these options from **'AssistMyTeam Helpdesk Manager Add-in > Advanced Options > KB'** tab.

7 Edit Answer

Click this button to edit/revise the description content of the knowledge base. By default, once a knowledge base article is created, subsequent accessing displays the KB in read-only mode.

8 Forward

Click this button to forward the current knowledge base item (including attachments) to a contact.

9 Save to DB

Click this button to save any changes made to the current knowledge base and close the inspector window.

10 Remove from DB

Remove the article permanently from the helpdesk database. You will be prompted with a confirmation. WARNING: This action is irreversible and so be very sure what you are removing.

11 Save Article as Draft

Press this to save the current opened article as a draft item your Outlook, so that you can edit it again later on without actually committing the changes to the helpdesk database. This may come handy in situation where you are waiting for more inputs, or you are typing in a long description of the problem and you only want to commit to save the changes to the database when you are fully ready.

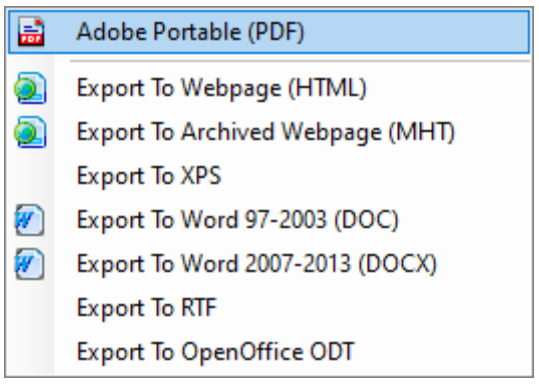
At any time, you can click 'Save to DB' button to commit the changes back to the helpdesk database.

12 Discard and Exit Article

Press this to cancel any changes made to the article and close the article window from Outlook, without committing any changes to the helpdesk database.

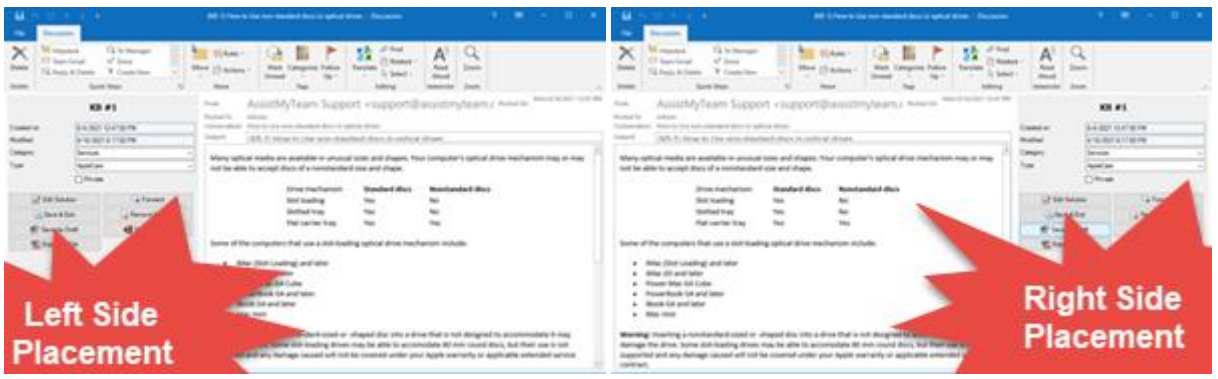
13 Export to file

Export the current article to PDF document file. You can also export to Word Documents, HTML, plain text etc.



14 Form Orientation

Change the orientation or placement of the article form in either **left** or **right** side of the conversations box of the inspector window of the opened case.



15 Article Subject (or Question)

The subject (or a question or a summary) of the current knowledge base.

16 Article Description (or Answer)

The description field of knowledge base item. A **Question-and-Answer** format is ideally suited to intuitively display KB article. It may have any number of file attachments, HTML formatting, and hyperlinks to other web pages etc. You can use the default Outlook formatting tools (such as bold, font, fore color etc.) on this field.

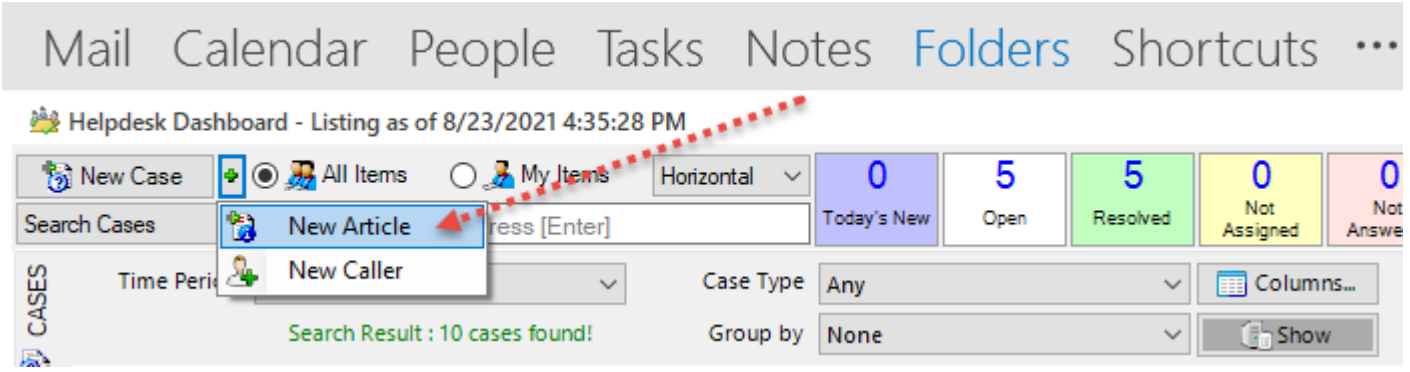
14.2 Creating a new Knowledge Base Article

An empty knowledge base can be created directly from the dashboard, in which case, it would have to be fed manually. A knowledge base can also be generated from an existing Outlook item such as email, task or appointment. Generated knowledge base item will then inherit the email body (and its format) as well as any number of attachments. Agents or helpdesk managers would then tag with a problem category and one of the types available for that selected category.

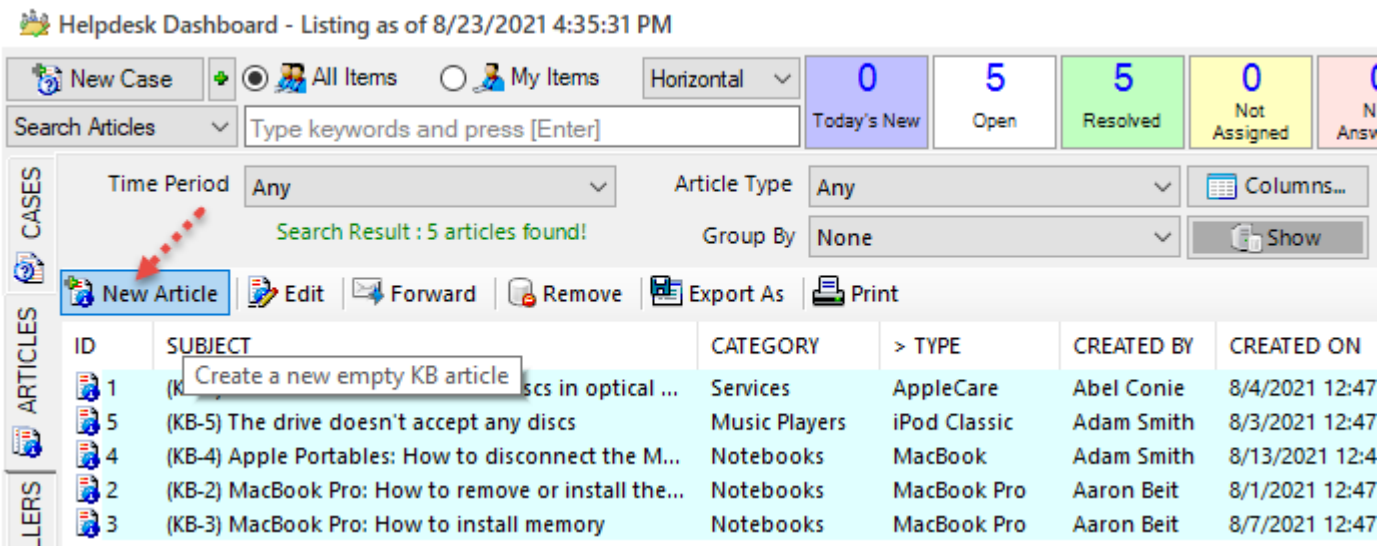
There are many ways to create a KB article and store it in the helpdesk database.

Creating new article from Dashboard

To create an empty KB article from scratch, click '**New Article'** from the menu you get under '**+**' in the helpdesk dashboard of Outlook.

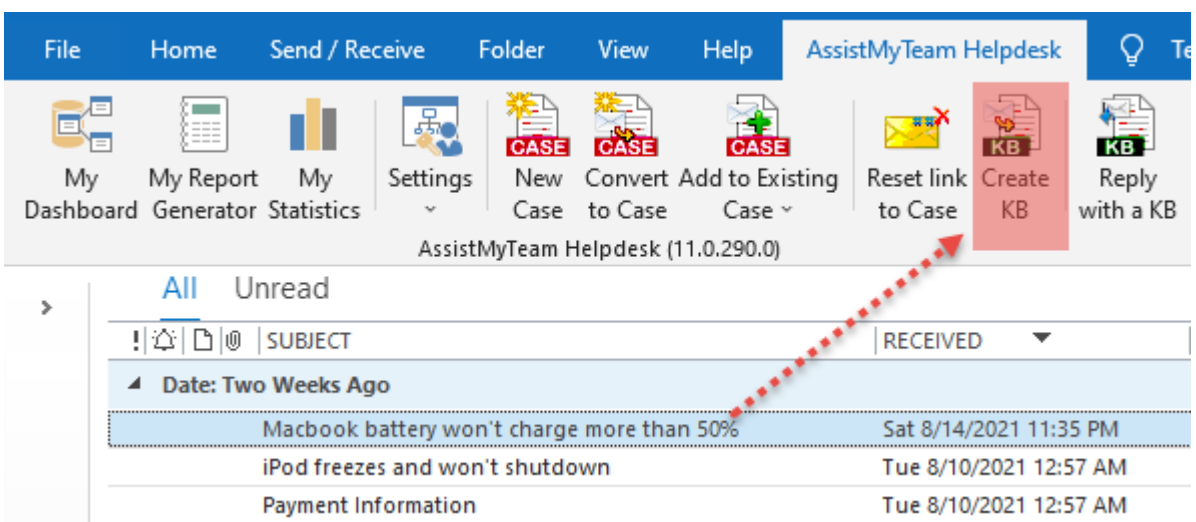


Alternatively, you can also click '**New Article**' button located in the Articles section of the dashboard.



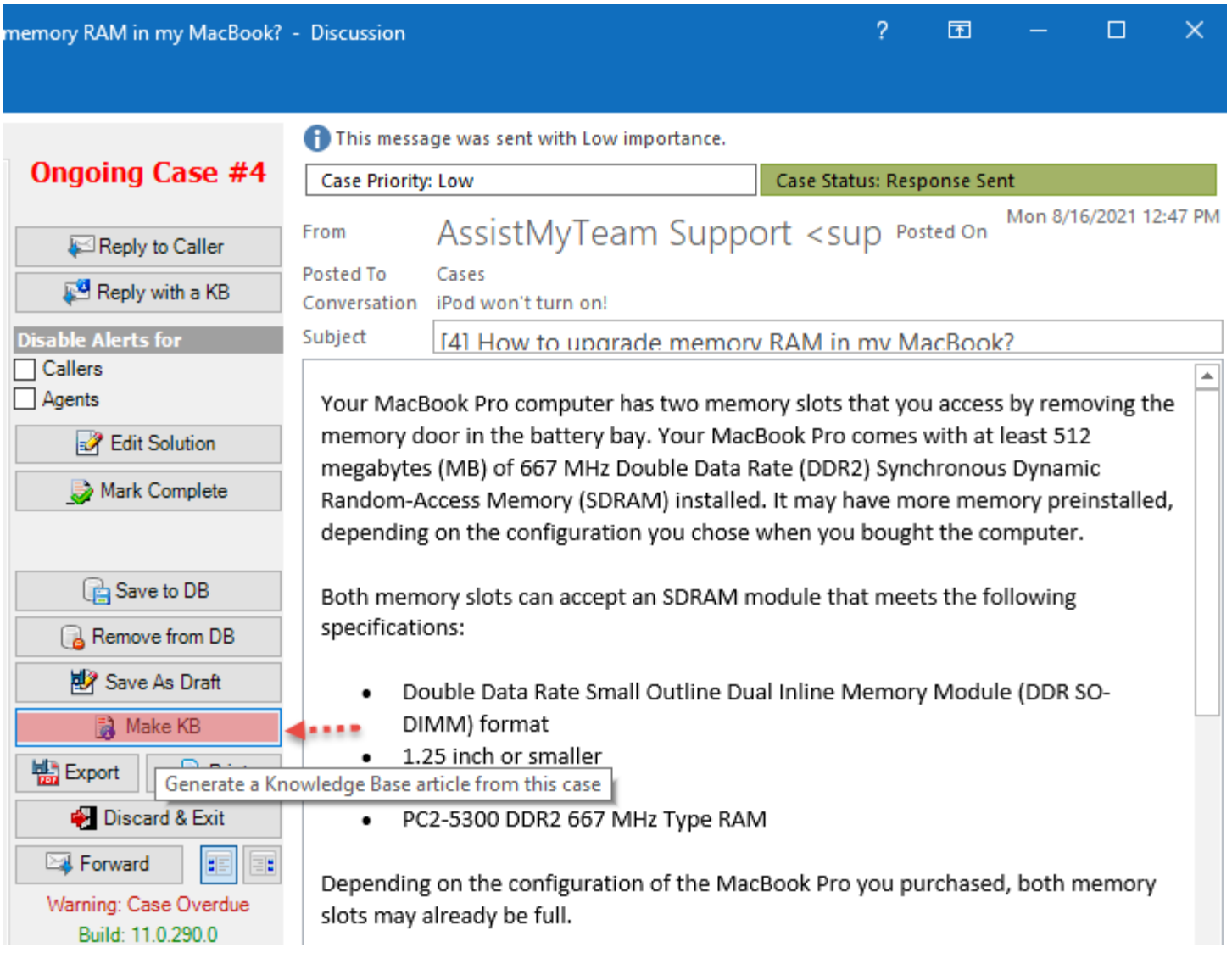
Creating new article from Inbox from an existing email

If an email contains useful information that helps in solving a problem, you can use it as a source to create a new KB article in the helpdesk for future use. From your Inbox folder, select that email and click '**Create KB**'.



Creating a KB article from a resolved case

If the current case contains any useful information that helps in solving a commonly recurring problem, you can use it as a source to create a new KB article in the helpdesk for future use. In fact, any support case is eligible to become flagged as a KB Article. An agent recognizing a repetitive support issue, can easily flag a resolved case as a knowledge article. Thus, it acts as an effective knowledge sharing medium, boosting support productivity by leveraging collective knowledge and providing invaluable KB Articles to support techs in a snap! It also helps in improving the average 'First Call Resolution' timing significantly, as agents find resolution to problems quickly.

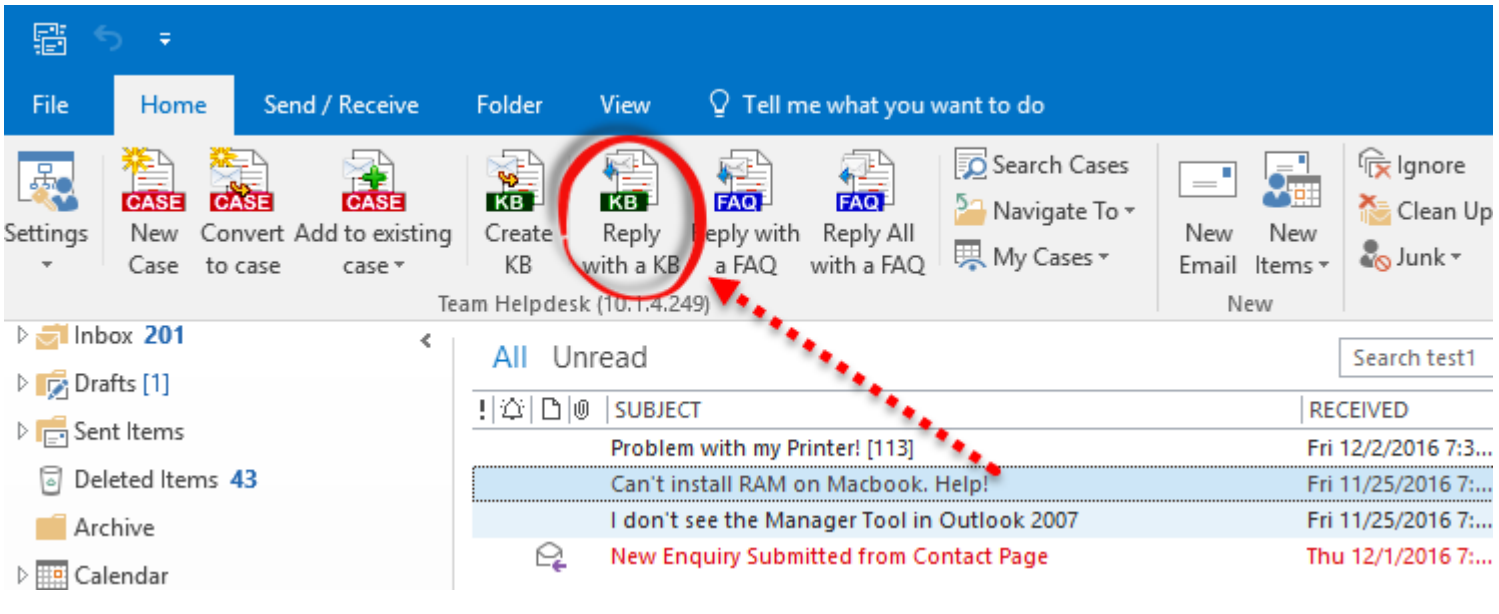


14.3 How to use the knowledge base articles in Outlook

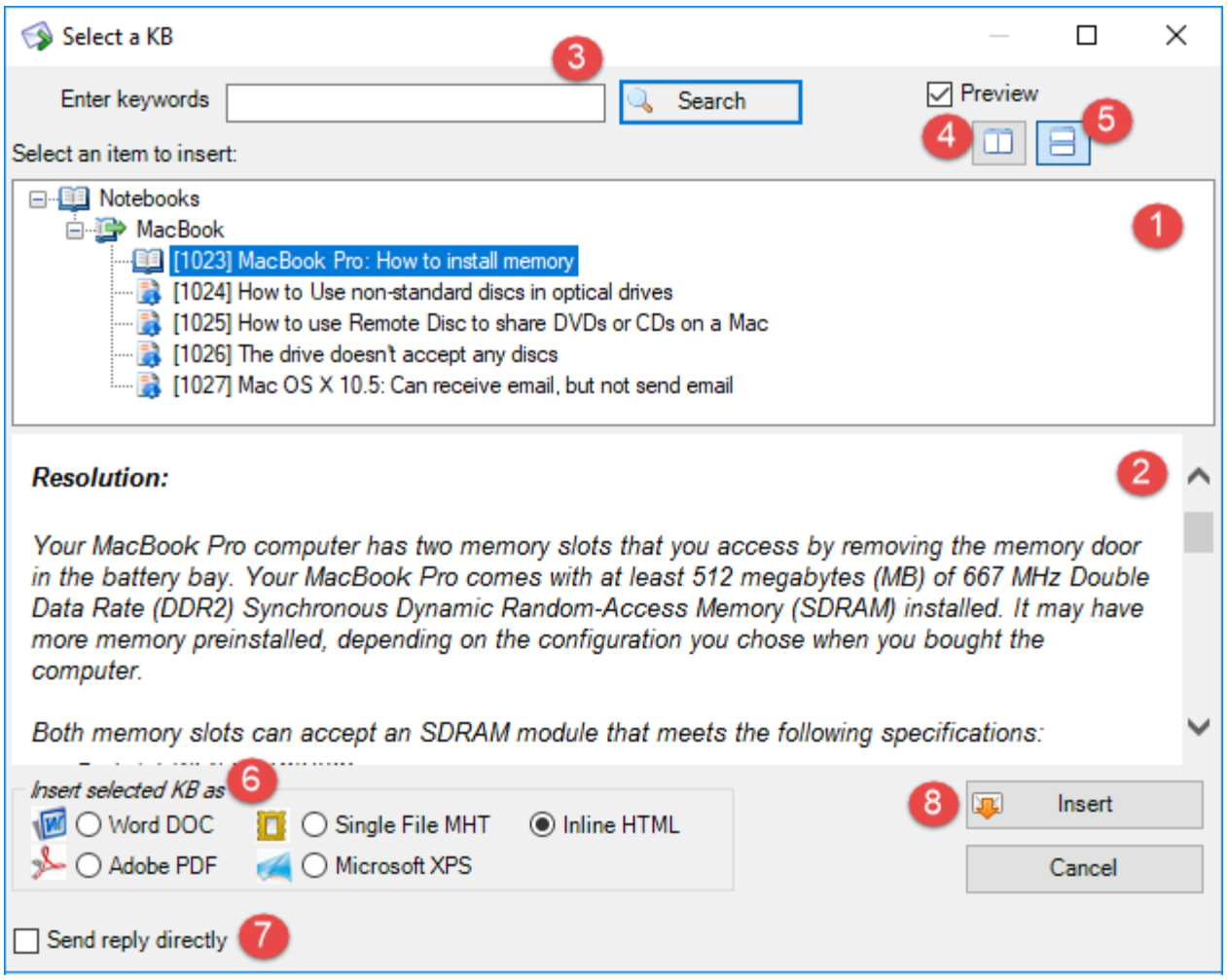
A knowledge base solution can be used for replying to emails, support case or for embedding into an appointment/task or for simply forwarding it to an Outlook contact. A dialog window allows the agents to browse through the existing knowledge base items, even preview it before it can be chosen for embedding into the particular Outlook item (email, appointment, task, support case etc.)

Steps to embed a knowledge base to a new email, appointment, task or a support case.

Select a particular outlook item (email in the screenshot below) and click the **'Reply with a KB'** button to display the KB selection dialog.



A pop-up dialog box allows you to browse through the existing knowledge base articles, and select the relevant article to be embedded either as Word, PDF or XPS attachment or as inline content into the email reply.

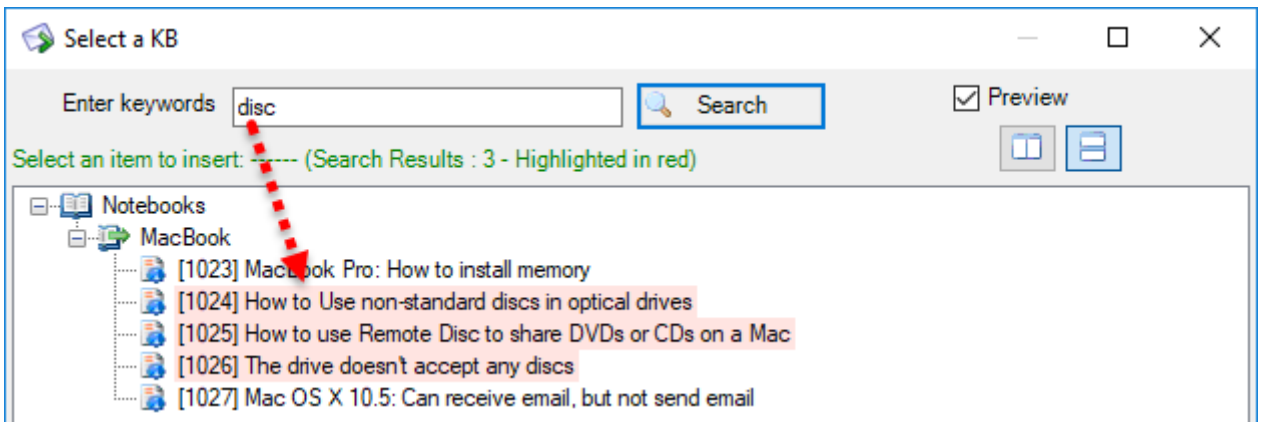


Browse through the listed KBs by problem type and category. Click a KB subject from the tree view to preview the content. Finally, when you have found the appropriate knowledge base item, select 'Insert'.

1. The listing of all non-private KB articles available for references. KB articles are presented in tree-view layout with problem categories as parent nodes and problem types as child nodes. And KB articles are then shown, grouped by category and type.

2. The preview pane - Choose a KB article and click to preview its content in the preview pane located below or right (depending on the chosen layout).

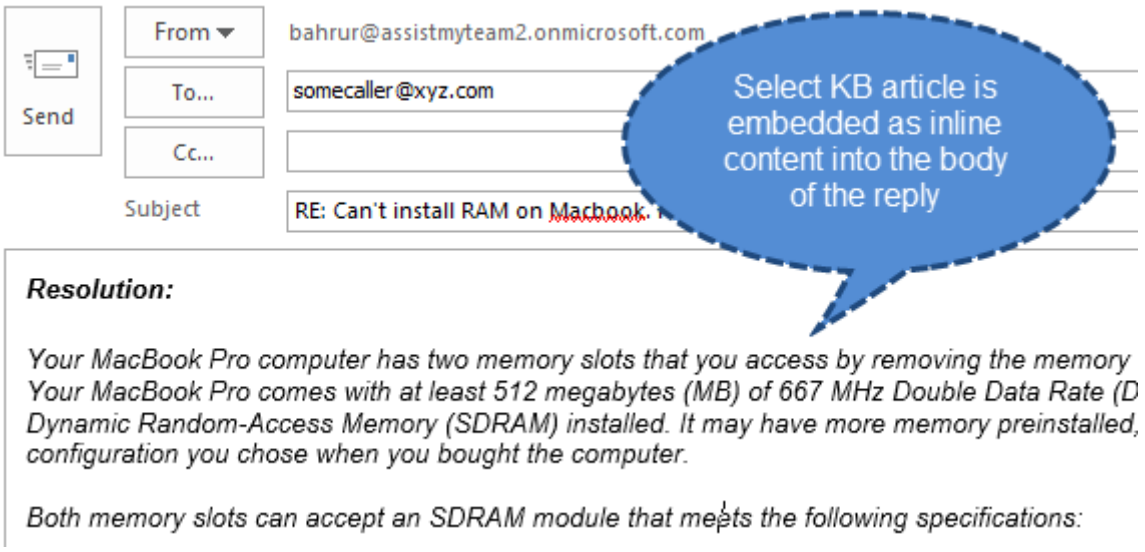
3. If you have hundreds and thousands of KB articles, finding the relevant and right articles could be tricky. For ease, you can search the KB articles with a keyword to find all matching KB articles that contain the keywords. KB articles that match the search will have light red background color for easy reference.



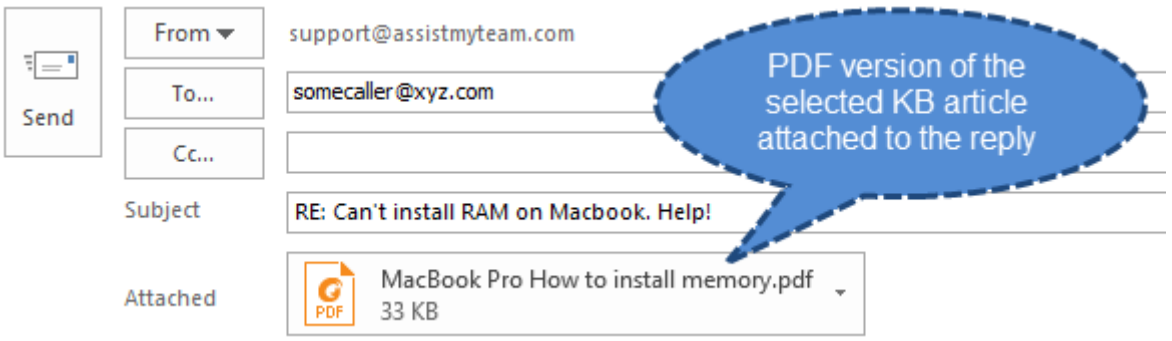
4. Place the preview pane of the chosen KB article to the right (side by side layout)

5. Place the preview pane of the chosen KB article to the bottom (top to bottom layout)

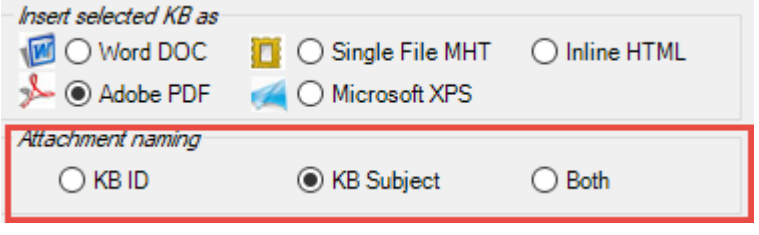
6. You can embed the selected KB article directly into the body of the email reply. Any inline images and formatting are preserved in its original state in the reply also.



You can also choose to insert as attachment in the form of a word document (*.doc), Adobe PDF (*.pdf), Microsoft XPS (*.xps) or as single file MHTML (*.mht).



Additionally, you can also customize the attachment name of the PDF or Word document such as naming the attached KB article file with the ID of the KB, or with the subject summary or a combination of both.



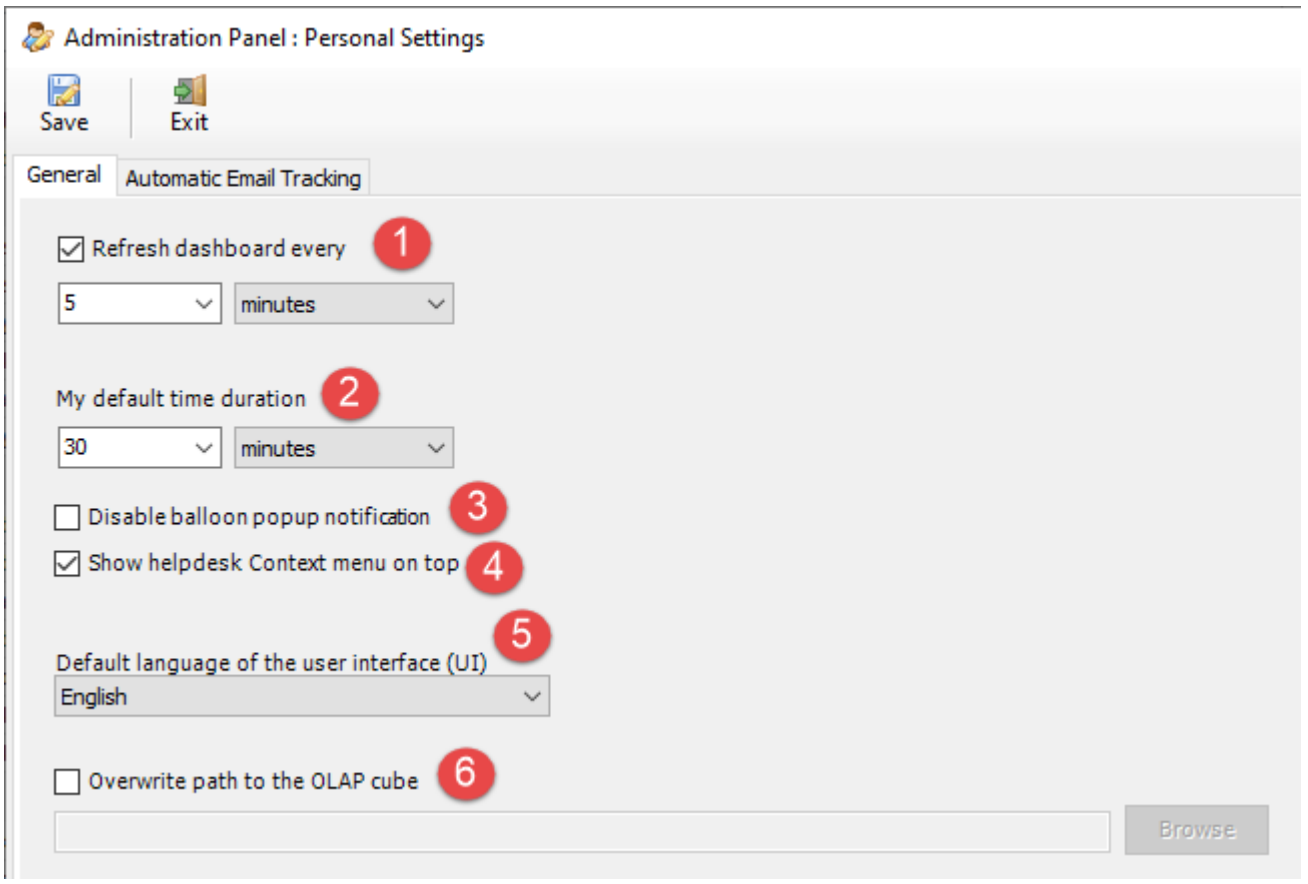
7 Check this option to directly send out the reply to the recipient without showing the compose window of the reply.

8 Once a KB article is found that resolves the issue as reported by the caller, choose it from the tree structure and click 'Insert' to continue.

15. Personal Settings

The personal settings, as the name suggest, are each agent's settings that are applied to AssistMyTeam Helpdesk System locally, i.e., the change in the personal settings is not affected to the workflow of other agents. The personal settings differ from other administrative settings in that it is saved locally to the system's registry, whereas other administrative settings are saved on the database.

15.1 General Section



1 Refresh Dashboard

You can specify the interval (in minutes or hours) to refresh the listing of cases and articles automatically in your dashboards. This make sure agents are looking at the information in the dashboard from the most current state of the helpdesk data. Instead of having to run a number of queries, the add-in runs these searches automatically, making sure that you are never looking at stale data. You won't have to remember to run important searches once you have selected the parameters in the dashboard - you'll be able to spend your time gaining insight into your assigned cases as well as overall state of your helpdesk.

2 My default time duration

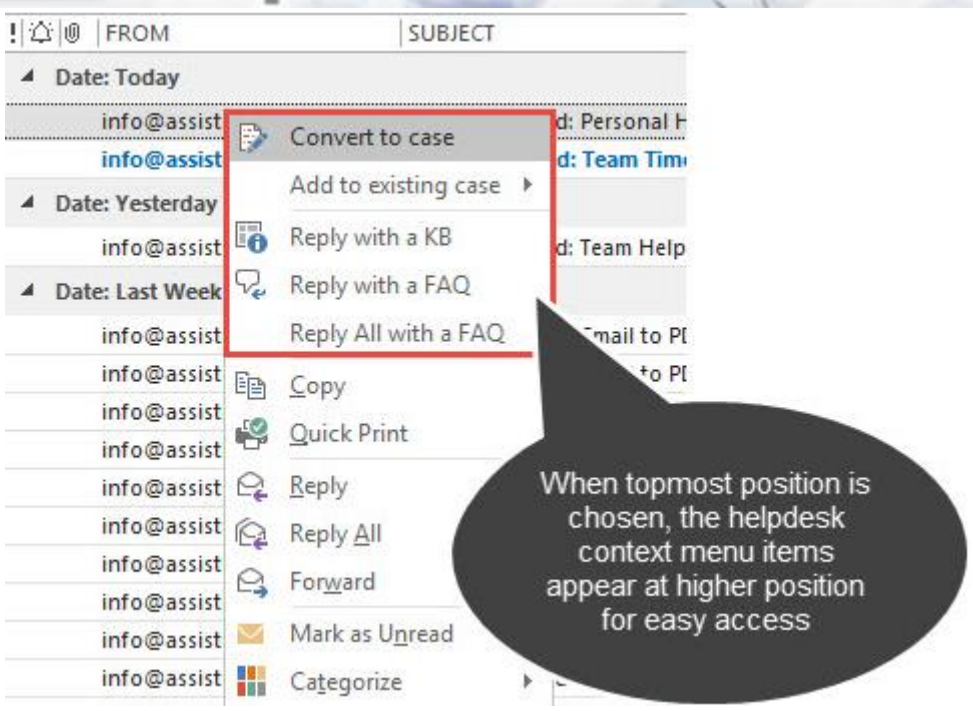
You can specify your own default time duration that will be used selected by default when you add new time spent entry in the case.

3 Disable balloon popup notification

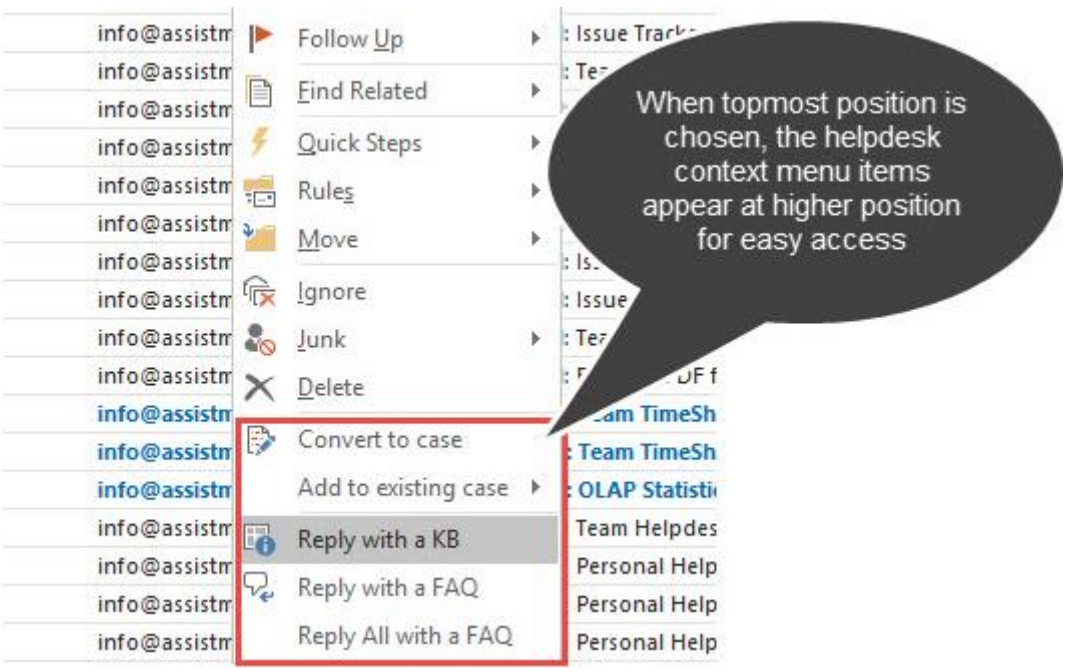
Enable this option to prevent the popup notifications to show up (in the right most corner of the screen) when there is a new event in the helpdesk.

4 Show helpdesk context menu on top

Enable this option to show the helpdesk context menu in topmost position when you right-click any case or email items in Outlook. By default, the helpdesk menus are shown in bottom position. When this option is enabled, the helpdesk menu items appear at higher position in the context menu (right-click menu).



If the option is unchecked, the helpdesk menu items appear at the lowest position in the context menu.



5 Changing the UI Language

Choose a language that will be used in all the AssistMyTeam Helpdesk UI in Outlook. The following languages are supported:

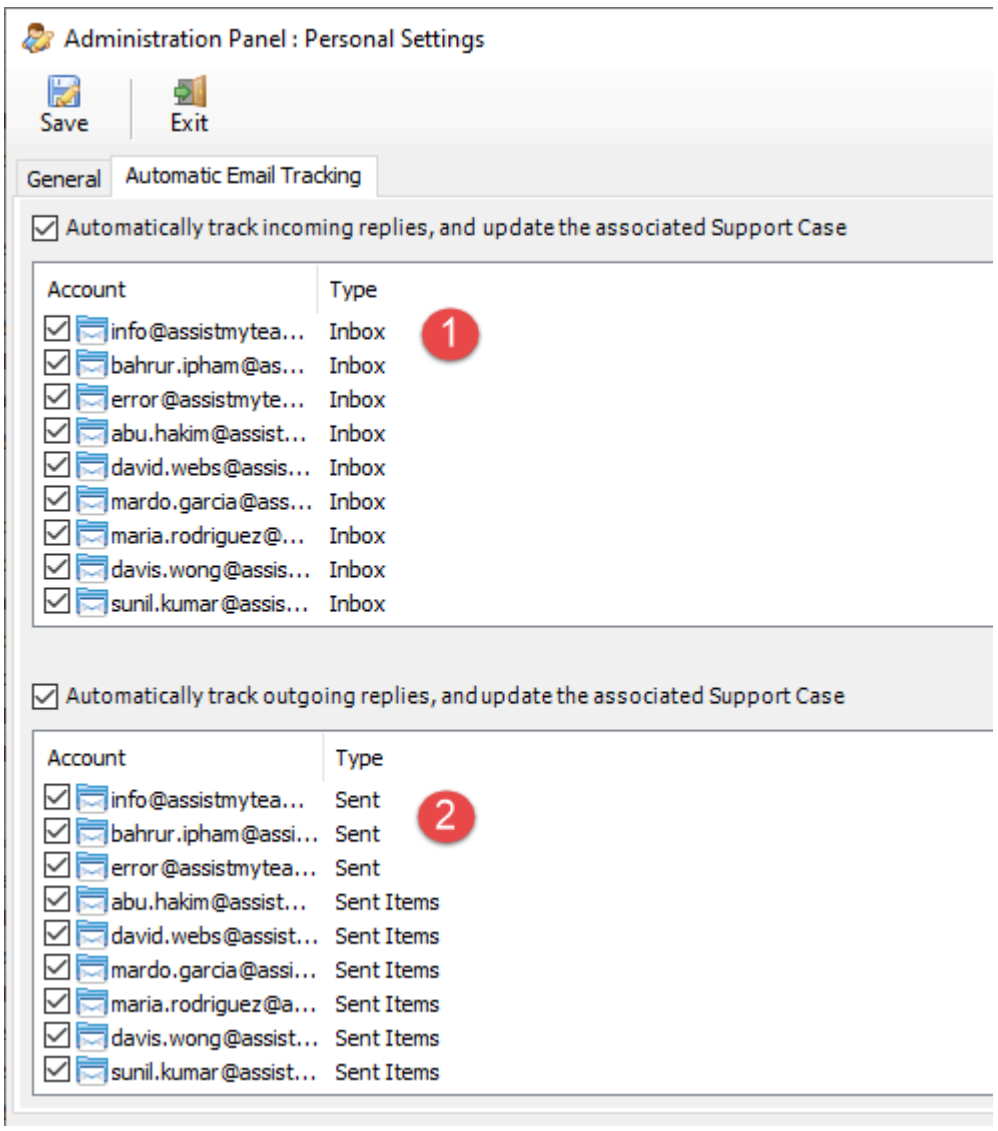
English, Español, Norwegian, Danish, Dutch, Deutsch, French, Finnish, Swedish, Portuguese

NOTE: When you switch to any language and save it, the chosen language will be applied to the next session of Outlook. Therefore, you are required to restart your Outlook for the new language to be affected to all forms, panels and UI of the add-in in Outlook.

6 Overwrite path to OLAP Cube

If the 'My Documents' of your workstation is mapped or set to a network path folder, you cannot run OLAP statistics from your Outlook. In such case, you can specify a local folder explicitly for use for OLAP reporting.

15.2 Automatic Email Tracking Section



1 Automatically track incoming replies and update the associated Support case

Enable this option for the incoming replies from callers to be automatically added and updated to the corresponding case. The agent add-in will then track and monitor the chosen mailboxes for any incoming emails that are related to existing cases. And if one is found, it will be automatically added and updated to its corresponding case item.

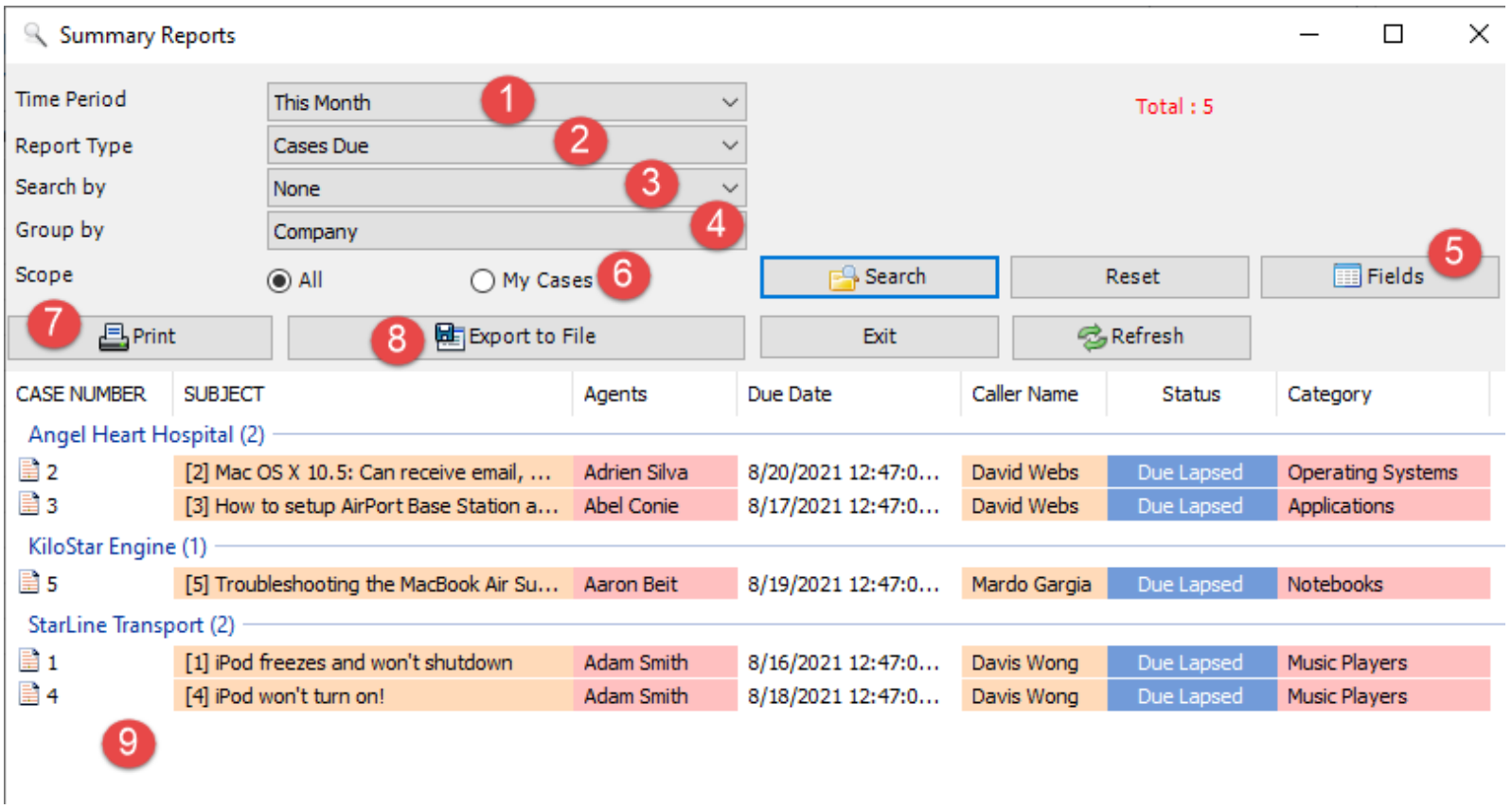
By default, the helpdesk Agent add-in tracks and processes the emails associated with existing cases from all your mailboxes. So, you don't need to manually enable them unless you had disabled them before. If other mailboxes won't receive any responses from your callers, you can uncheck the corresponding Inboxes and disable the automatic tracking feature on those mailboxes.

2 Automatically track outgoing replies and update the associated Support case

Enable this option so that responses to the caller from the helpdesk are automatically added and updated to the corresponding case. By default, the agent add-in monitors all the sent items folders of your mailboxes for outgoing emails, so you don't have to manually check and enable them unless you had disabled them before.

16. Helpdesk Summary Reports

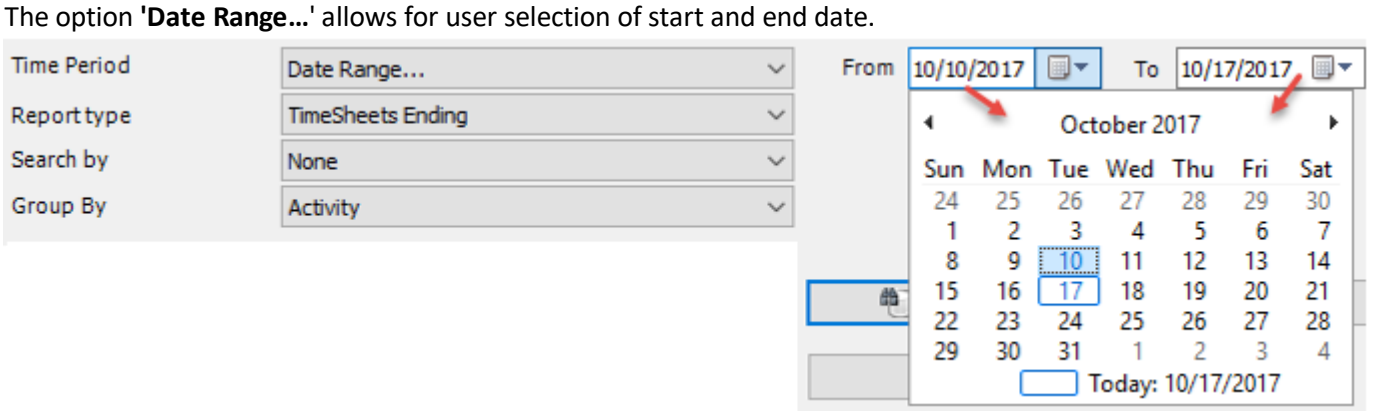
Helpdesk summary reports play a vital role in keeping informed managers about recent cases - that were created, worked, overdue or resolved. AssistMyTeam Helpdesk provides an inbuilt tool that generates reports on support cases based on a specified interval such as today, this week, this month, last month etc. Any fields can be selected for inclusion into the reports and can be saved as to file or printed for sharing and easy distribution.



Each case in the search result is color coded to reflect the current status of the case. You can easily recognize which cases require the attention or review, and plan actions accordingly.

1 **Time Period:** Choose a time period from the followings under which the search will be confined:
Any, Today, Yesterday, Tomorrow, This week, Last Week, Next Week, This Month, Last Month, Next Month, This Year, Last Year, Date Range, On

The option **'Date Range...'** allows for user selection of start and end date.



2 **Report Type:** Choose a report type from the predefined ones below:
Any, Cases Created, Cases Resolved, Cases Ongoing, Cases Worked, Cases Due, Cases Response Date, Cases unassigned, Cases lapsed - Due Time, Cases lapsed - Response Time, Cases with no Due Date, Cases with no Response Date, Cases with no Caller

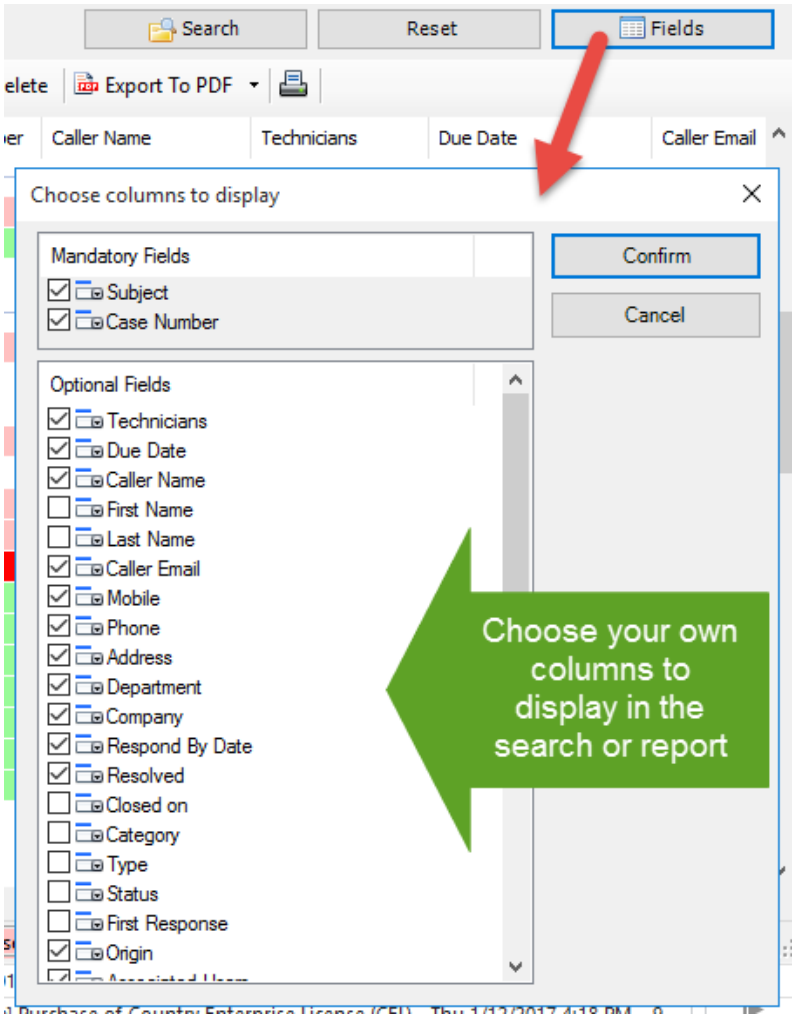
3 **Search By:** Further refine the search by filtering through keywords or using one of the following helpdesk fields:
Status, Problem, Caller, Company, Priority, or Author.

4 **Group By:** You can choose to group the cases either with: *Agents, Status, Problem Category, Problem Type, Caller, Company, Priority or Author.*

5 **Fields:** For finer control over the output of report, you can choose which fields (including custom fields and calculated fields) are to be included in the report.

You can sort the items by clicking at the column headers, as well as also re-arrange the columns in the list view according to certain sequence of your choice, and even set the width of the columns. These formatting from the List view panel will be inherited on other tabs - HTML, editable HTML and Grids.

The tool will remember your choice in subsequent runs. You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.



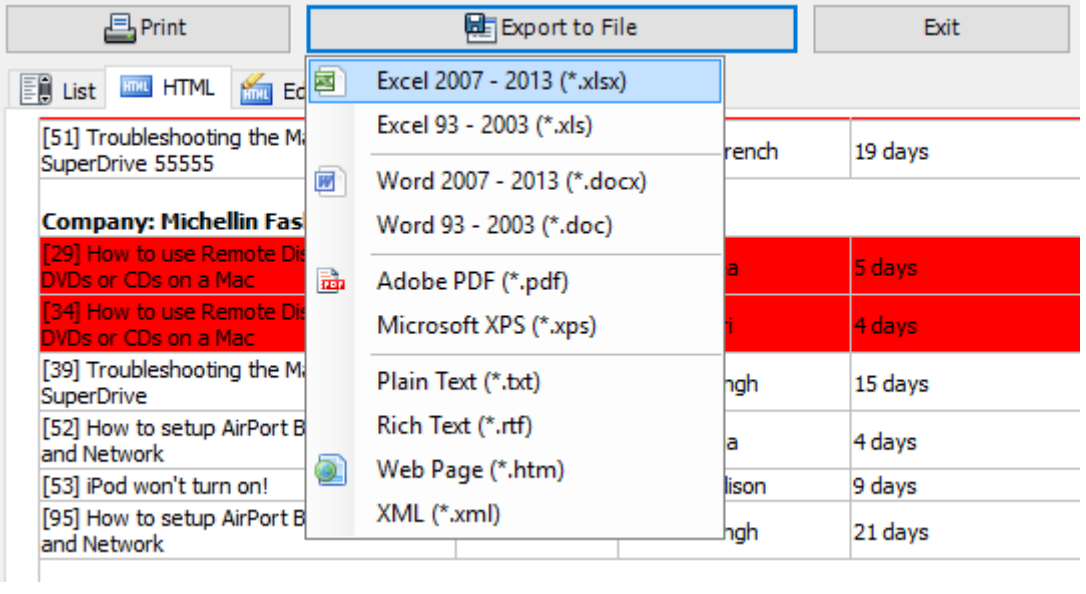
Some useful calculated fields that you can include in the report:

- **Raise Duration** - interval between when the support request (email or phone call) was received and when the case was raised.
- **Response Duration** - interval between when the support request was received (email or phone call) and when the first response was made to the caller (by an agent)
- **Open Duration** - interval between when the case was raised and the current time.
- **Resolution Duration** - interval between when the case was raised and when it was closed/completed.
- **Breach Duration** - interval between when the case was due and when it was actually closed/completed.

6 **Scope:** Choose if to confine the search to your assigned cases only or include all cases.

7 **Print the current report** - When you click 'Print', you would be presented with the print dialog (similar to one used by Internet Explorer browser). Within that dialog, you would be able to customize the print settings. Note that, as there are multiple report modes (namely, list, HTML, Grid), the printed report will be sourced from the current mode (tab) that you are in.

8 **Save the current report to file** – Once you get the look and feel of your report, you can then export the report to one of the many popular document formats supported such as Microsoft Excel sheets, Word documents, Adobe PDF, Rich Text or web page etc.



9 **List report view mode –** This act like a template to the other three report modes. For finer control over the output of report, you can choose which fields (including custom fields) are to be included in the report. You can sort the cases by clicking at the column headers, as well as also re-arrange the columns in the list view according to certain sequence of your choice, and even set the width of the columns. These formatting from the List view panel will be inherited on other tabs - HTML, editable HTML and Grids.

17. Helpdesk OLAP Statistics and Reporting

With the integrated Online Line Analytical Processing (OLAP) tool, helpdesk managers can analyze the support request data in multidimensional view and extract mission critical information and intelligence that will enable better decision- in your helpdesk and organization. The tool supports the ability to explore large complex data sets and allows displaying in grids, charts and graphs and support most common operations such as pivoting, drill down/slice and dice, filtering etc. With such arrays of information, the organization can reengineer their help desk processes, reinforce resources and forecast problem areas and exploit all these factors for competitive advantage.

Why OLAP?

Real strength of OLAP is its ability to examine and view data in ways not ordinarily possible. By allowing varying levels of granularity during data inspection and visualization a lot of information can be revealed that would otherwise be hard to attain. Given that most business models are constrained by more than three dimensions, it is hard to fully evaluate a business without the ability to inspect each dimension in detail while preserving context eliminating all guesswork. OLAP is perfectly suited for this purpose. Now it’s easier than ever to spot new trends and discover unknown problems in your data flow. The statistical tool will help you gain an insight into your data and make new discoveries. Comes with various inbuilt reports specific to AssistMyTeam Helpdesk Cases.

Reporting made easier

The statistical tool's simplistic point-and-click interface will ensure managers easily achieve the high-level views of information they require. Additionally, the OLAP client makes creating reports destined for different management levels a simple task - eliminating managers' dependence on IT personnel. By unifying data analysis needs on a single platform, it provides an unparalleled array of reporting tools for web portals, intranet applications, websites, and other data-rich applications.

Printing capabilities

You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

Copy to Clipboard

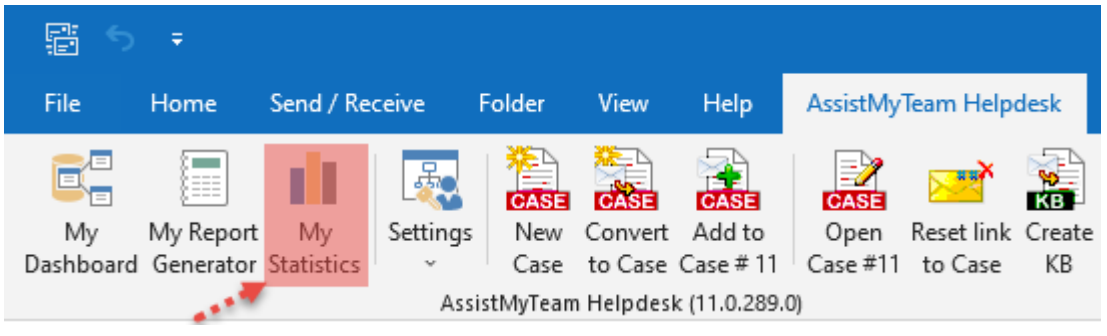
Select any data range in Chart/Grid and copy to clipboard. Then you’ll be able to paste it in an Office program for further analysis. You can also paste the chart like a picture to illustrate your investigations. This greatly simplifies the task of creating detailed, data-rich documents.

Save Reports in file

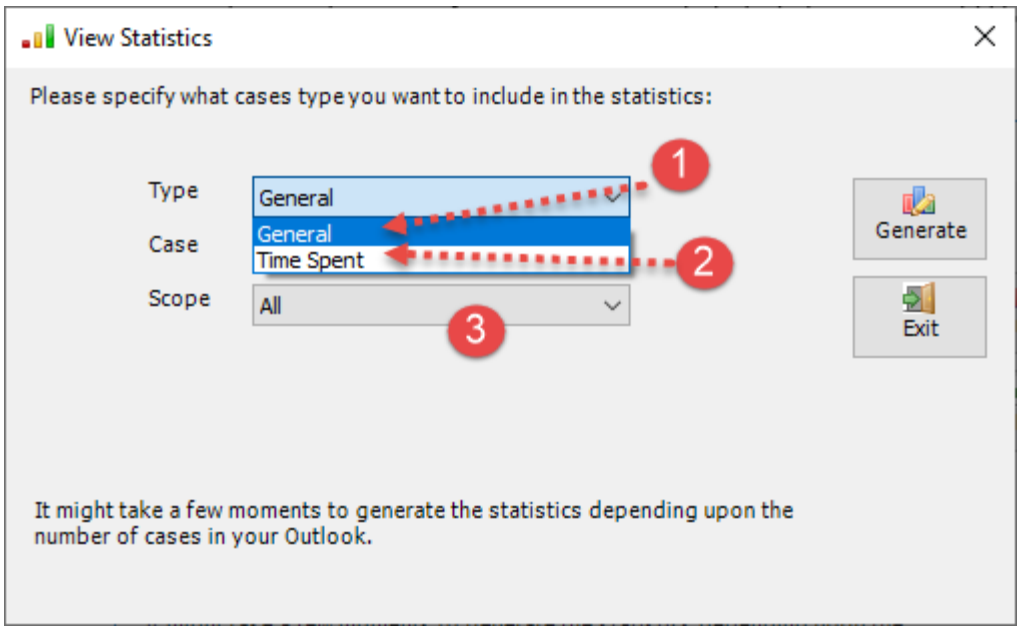
At any stage, managers/agents can save the report and distribute it to another person for analysis by network or email, so when the recipient gets the file, he or she can open it and see the same OLAP slice.

Launching the statistics tool

Go to **Outlook > AssistMyTeam Helpdesk toolbar** and click ‘**My Statistics**’.



You can choose what type of OLAP statistics on helpdesk data you would like to see and report on. You can specify if the statistics would be confined to ongoing cases or resolved cases or on both.



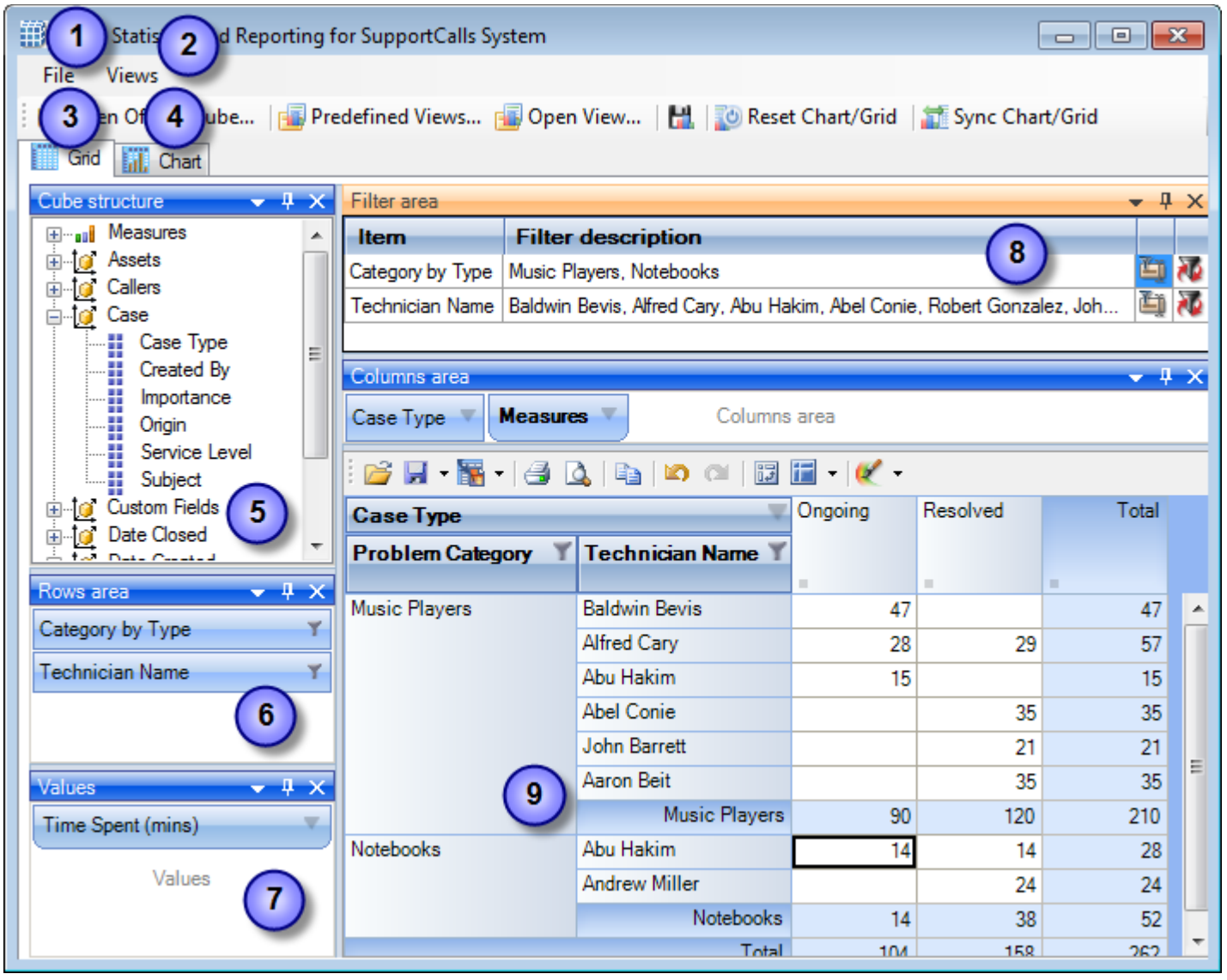
There are two parts of OLAP Statistics

1 **General OLAP**
Choose this OLAP to run statistics on cases with all helpdesk parameters and fields except for time spent by agents on cases.

2 **Time Spent OLAP**
Choose this OLAP to run statistics on time spent entries by agents on cases.

17.1 The User Interface

The statistical tool presents an easy-to-use interface for operating an OLAP-slice. The basic data is displayed in the Working area. The environment tools for managing the content and characteristics of the slice are placed on the pivot panels. You can set the panels' layout the way you like. To drag a panel to a different location, you need to capture and drag its header with the mouse. At that, all the possible locations, where it can be dropped to, will be highlighted. You can detach a panel from the component; it will be displayed as a float window.



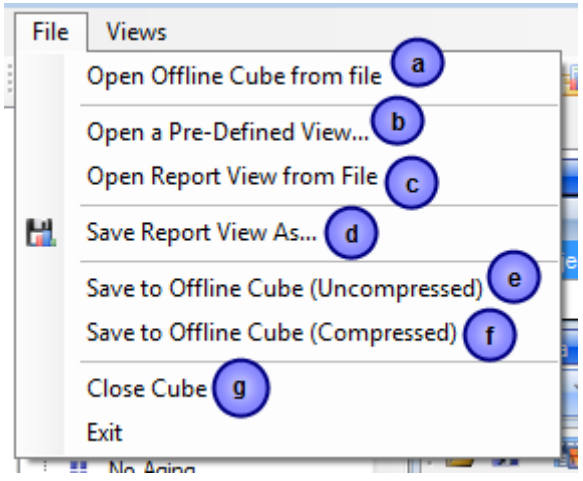
Instrumental panels can be:

- Attached to any side of the component;
- Placed into any existing panel;
- Displayed as bookmarks on any panel;
- Set as auto-hidden panels;
- Used as float windows.

You can change the view of the slice by relocating measures and hierarchies within the environment panel. When you start dragging an element, all the possible locations, where it can be dropped to, will be highlighted. Most elements have context menus that duplicate the mouse actions and provide additional control functions for managing the slices' view.

1 **The File menu**

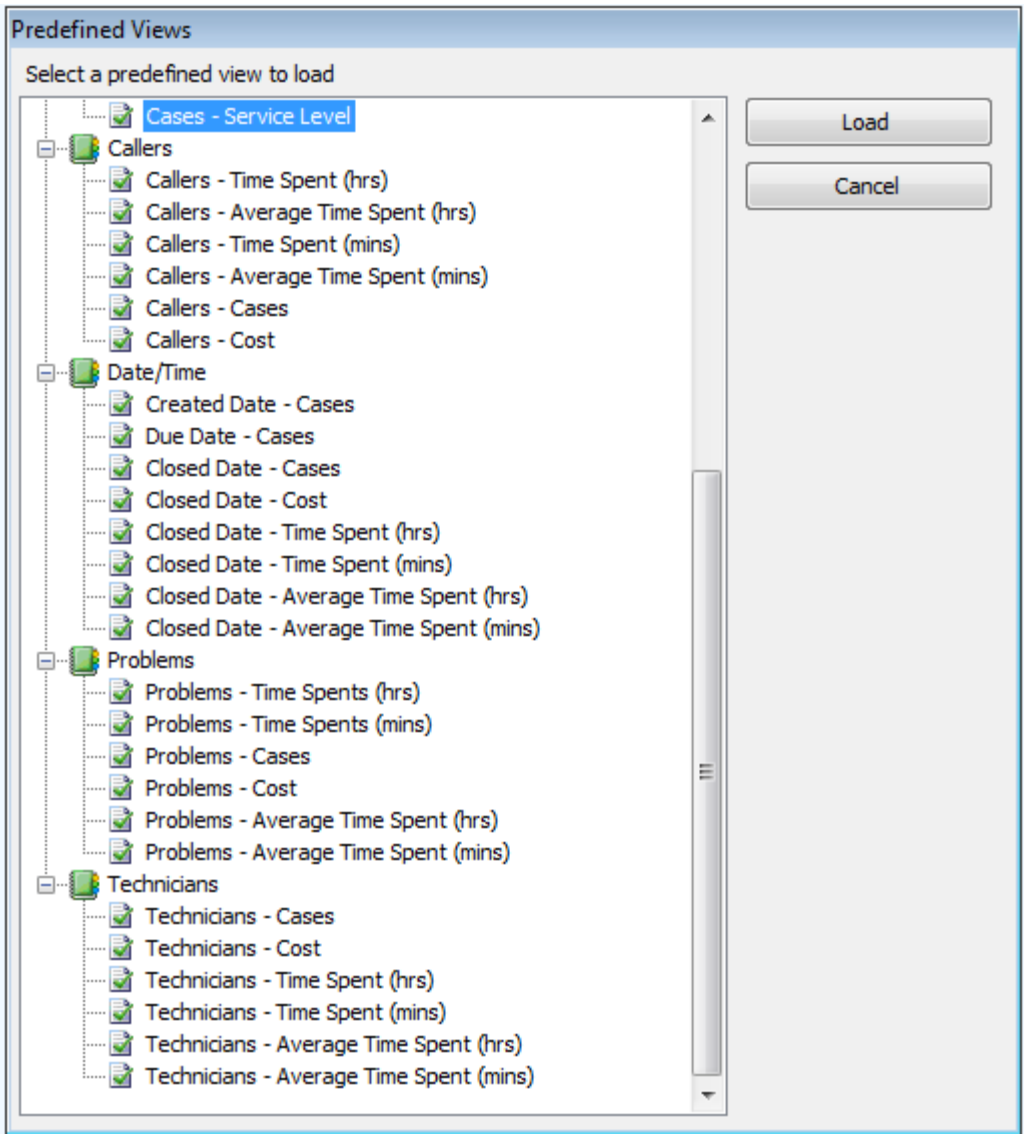
The file menu consists of the following commands:



a) **Open Offline Cube from file** - While generating a live cube from Outlook always provides the advantage of analyzing live data, often, you might be away or disconnected from the network.

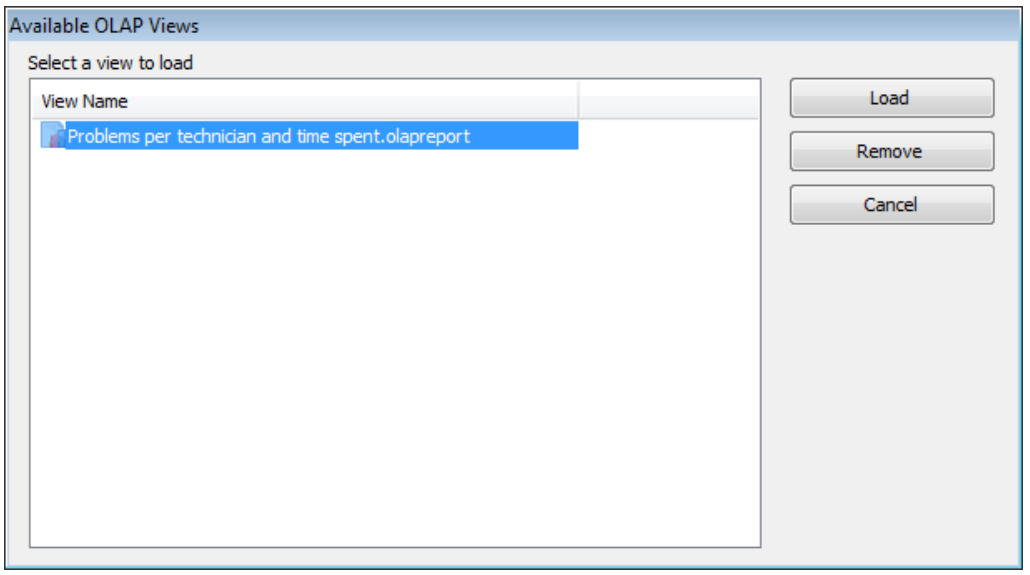
In such scenario, you have the option of connecting to an offline cube, which was previously generated and saved to your local folder using this utility. An offline cube file has the extension - ***.offlinecube*** and can be either in compressed or uncompressed format. An offline cube gives the same functionality as that of a live cube (which is generated from the Outlook data at real time), except that the data in the offline cube is only current to the time the cube was saved to file. This provides the flexibility to continue analyzing the cube and writing reports etc, while you are on the move.

b) **Open a Predefined View** - Pre-defined reports are available under Cases, Callers, Date/Time, Problems, and Agents nodes. Clicking one of child node report loads the statistical analysis of that report, the resultant of which will be displayed in the Grid or Chart (depending on the current active view).

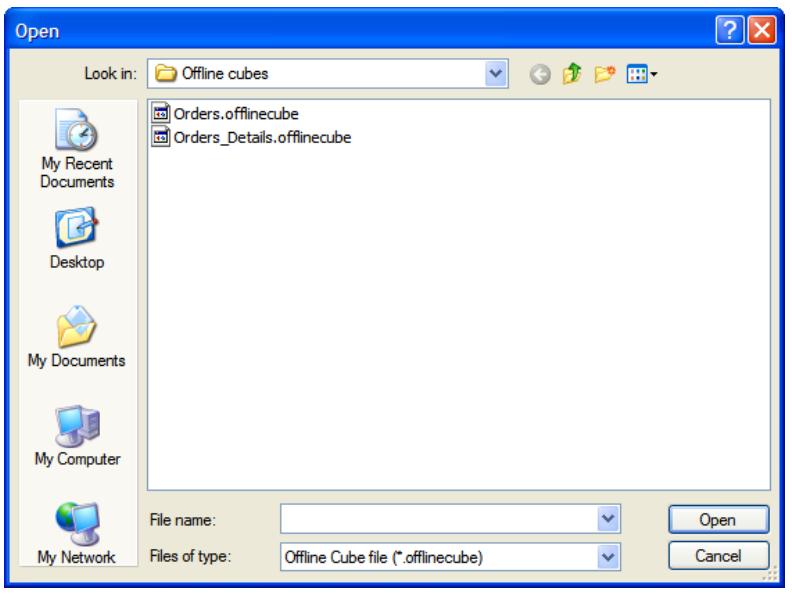


c) Load report file from Favorite – You can customize or create your own views and save them to the favorite. Once saved, your views would be saved under the 'C:\Users\USERNAME\Documents\AssistMyTeam Helpdesk Reports\Views' folder (in windows Vista and 7). For windows XP, it should under My Documents.

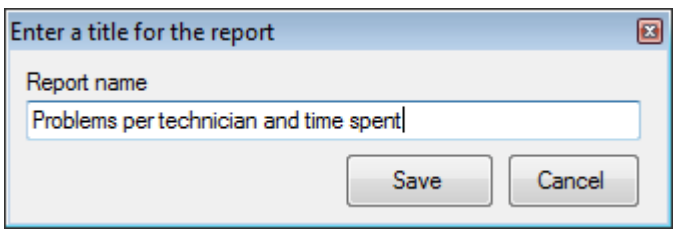
When you open the favorite from this menu, you can choose to load your saved view.



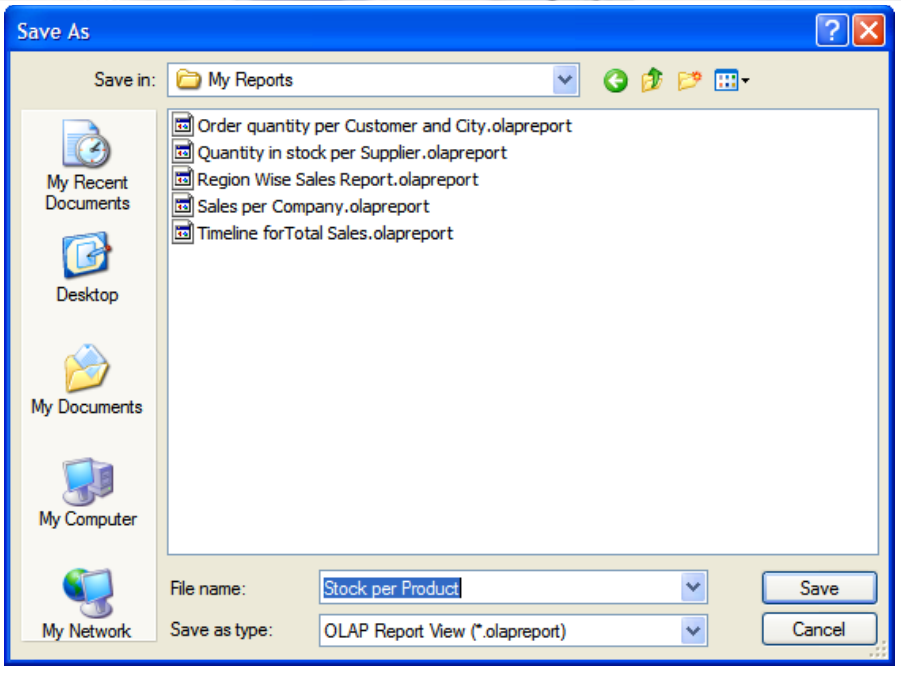
d) **Open report view from file** - Once a particular snapshot of the statistics is achieved, you may want to save it for future reference or share it among your team members. A report view is the current state of the statistics in the Grid/Chart working area, with specific member fields on the pivot panels (Rows and Column areas) and measure fields in the values area. It has a file extension '.olapreport'.



e) Save report view to favorite – You can save the current view of the statistics (grid or chart) to the favorite, by specifying a name of the view.



f) **Save report view as** - If you want to share a report view with others, you can simply save the current report (state of the statistics along with the pivot details) to a file folder of your choice - could be a network folder also.



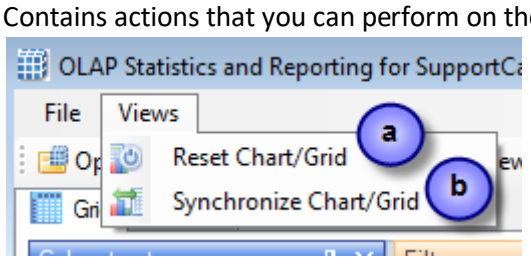
g) **Save to offline Cube** – Once you have loaded a live cube from the cases, you have the option to save the entire cube data to a file (with the extension - ***.offlinecube***) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed format, the former option will enable you to reduce the file size considerably.

h) Same as **e**. (above)

i) **Close the cube** - This option closes the cube from the OLAP Statistics and free up the memory for loading another cube.

2 **View Menu**

Contains actions that you can perform on the current report view.



a) **Reset Chart/Grid** - Empty all the member fields from the pivot as well as the data from the working area of the chart/grid. This is useful if you want to start over on a new report view.

b) **Synchronize Chart/Grid** - This option allows you to reflect the state of the statistics between the Grid and the chart. It is particularly useful, for example, when you have built up a grid with aggregated data, but want a more visual representation of the statistics in form of graphs and bars. Also note that, the synchronization will be done to the other part (grid or chart) based on the current interface.

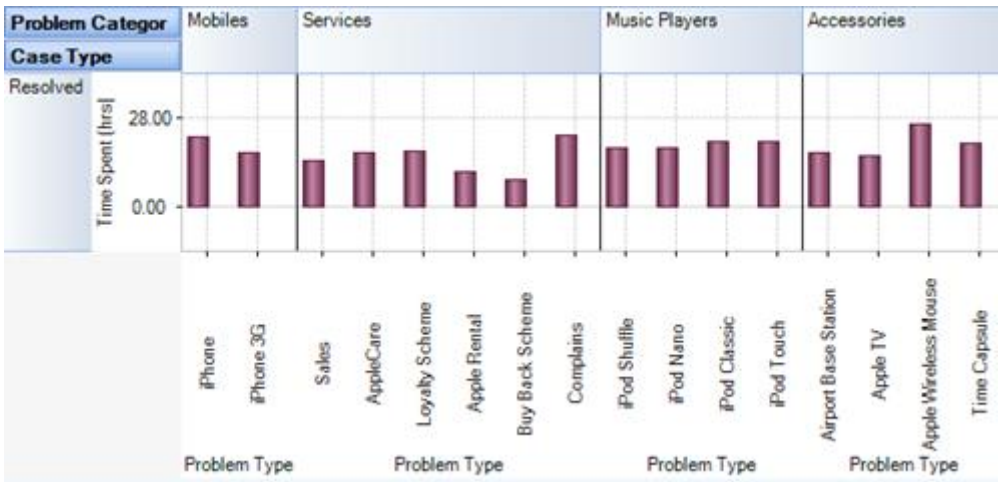
For example, if you are in the grid view, and if you pressed 'Synchronize Chart/Grid' it would read the state of the Grid view and impart the same state (same members and measures) to the Chart view and vice versa. Each of the Grid and Chart view can be worked independently as long as you don't press this synchronize option.

3 **OLAP Grid panel**

The OLAP Grid control comprises of a multi-dimensional table with expandable nodes. These nodes group and display data according to the hierarchies used to define the measures and dimensions upon which the underlying data has been organized. A unique feature of control allows for building the OLAP-reports of the exceptional level of complexity. In tandem with the OLAP Chart, the OLAP Grid provides an ideal means of clearly conveying data to the user.

4 **OLAP Chart panel**

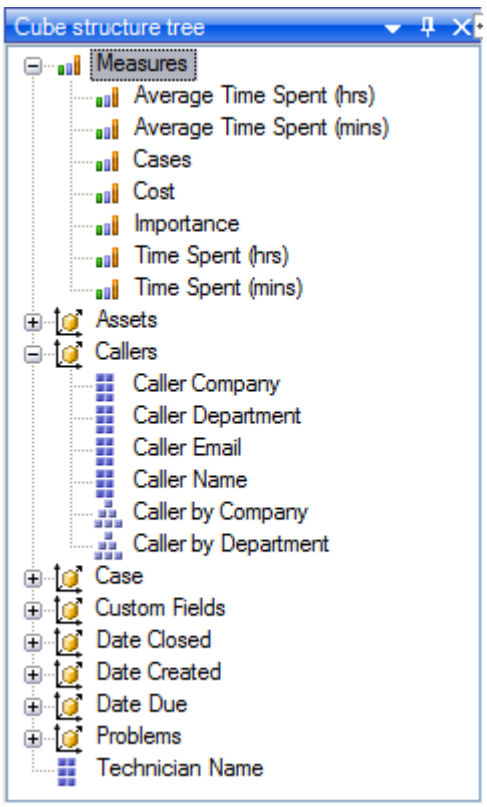
While OLAP Grid allows working with numbers, the OLAP Chart allows representing the project data graphically. This gives managers and members a unique opportunity to analyze their project data visually, dealing with charts rather than numbers, which is much easier to perceive.



5

Cube structure panel

The panel contains the Cube structure - measures and hierarchies as a tree. The measures are grouped in the set, displayed in a branch. Rest of the tree nodes are the dimensions that contain hierarchies.



- Measure
- Dimension
- Attribute hierarchy
- Multilevel hierarchy

To select a measure for display you need to drag-n-drop it to the Measures panel or the data area.

To select a hierarchy for display – drag-n-drop it to the hierarchy area or the pivot panel (rows or columns area).

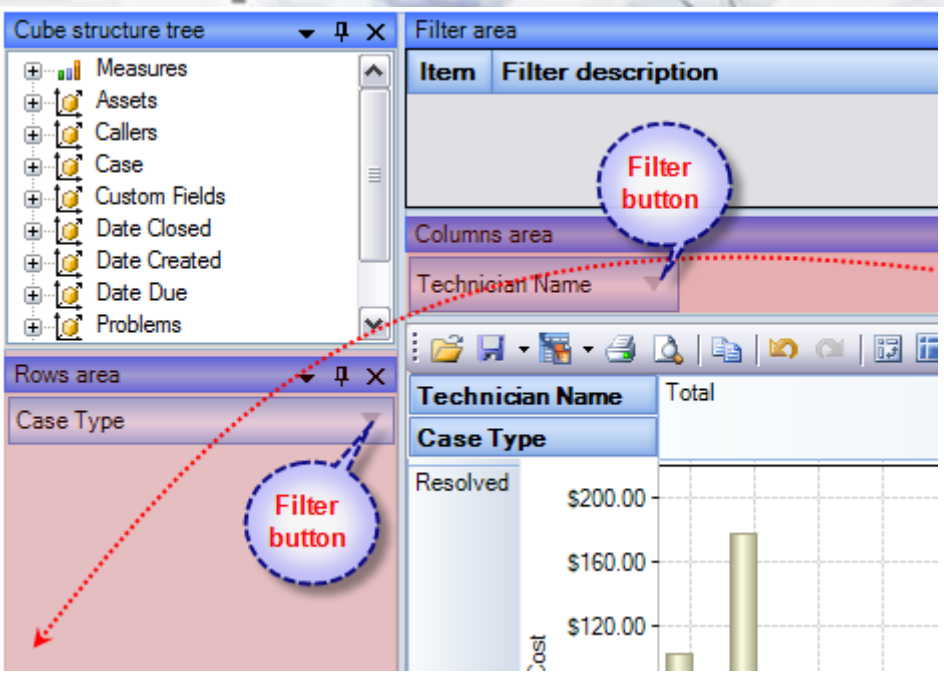
- Measures are grouped in the Measures category.
- Hierarchies are sorted into folders - dimensions. If there's only one dimension in a hierarchy, it will be displayed in the tree root.

Both hierarchies and measures have their own menus. Right click will call the context menu that gives you an option to place the element where you like. You can also filter the selected element (see Filtering hierarchies and measures) or place it to the selected panel.

6

Pivoting panels

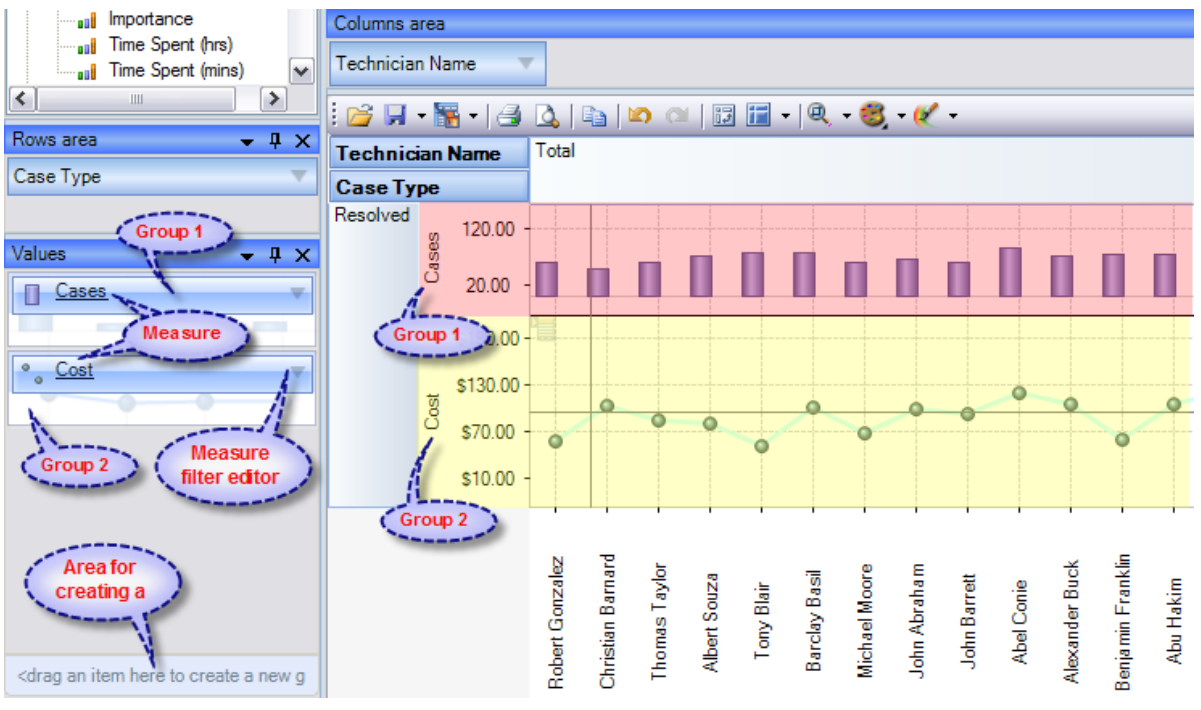
A pivot table lets user design the report online by dragging and dropping measures, dimensions and levels into the pivoting panels. Note that the column panel may contain no more than one (!) measure. Panel elements can be dragged with the mouse to other panels. To filter elements, press the Filter button (see Pivot panel view) or use the appropriate items from the context menu.



7

Measure panel

Measure panel consists of groups of measures that make up the charts' vertical axes (see Measure panel components). Each group of measures corresponds to a set of charts in the data area. Groups of measures are situated in the main part of the panel.



You can drag measures from one group to another, or extract measures from groups to delete them. To create a new group, you need to drag a measure to a place on the panel not occupied by another group or to the <drop an item to create a new group> panel.

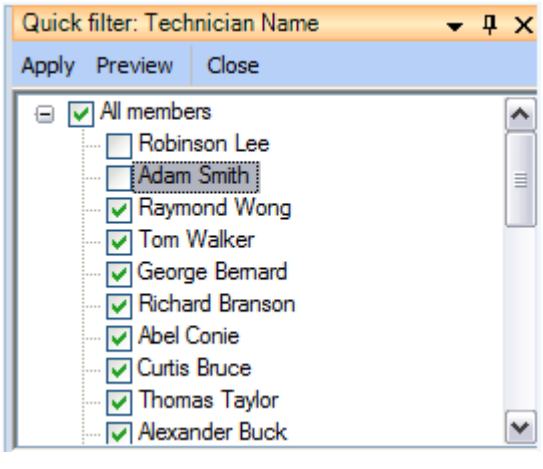
Clicking a mouse button on measures will call the context menu. From here, you can move a measure to one of the pivot panels or to the modifiers axis, or assign a measure filter. Also, you can assign the marker type of a chart point and its color.

8

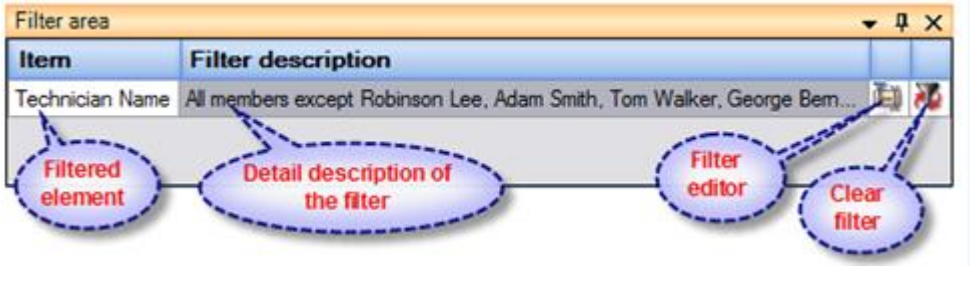
Filter panel

This statistical tool allows for easy selection on what data you want to see and what you don't. You can apply powerful filters to anything including hierarchy members, and measure values, thus leaving out the unimportant data. You can sort the data to see, for example, the top 10 values and then you can gather the rest of the values into a single group, so you only have what you really need.

The filtered elements (hierarchies and measures) are automatically transferred to the Filter panel. To assign a filter, you have to move an element to the Filter panel. If the element hasn't been filtered the appropriate visual filter editor will be shown, similar to the one on the right:



In the Filter panel, you can call the Filtered Element Editor individually for each element.



9

Working Area

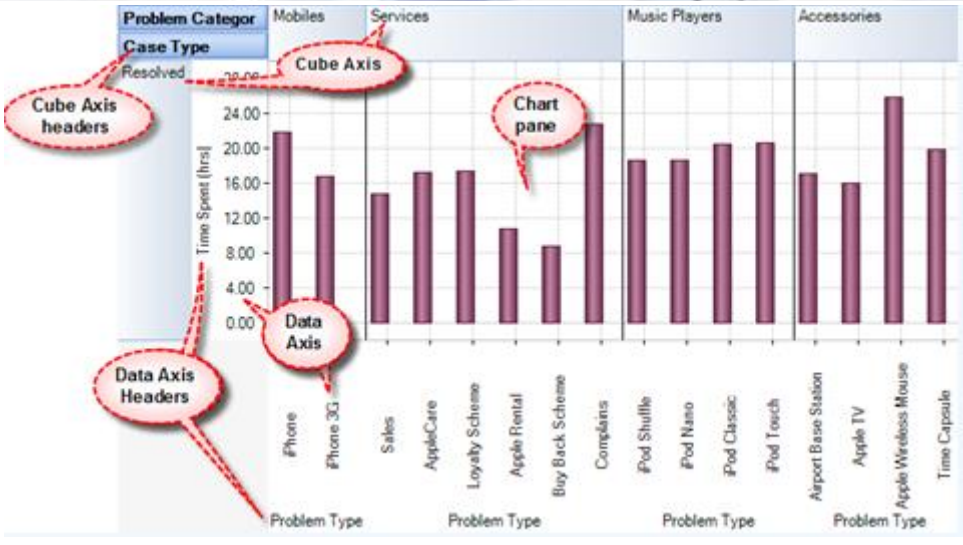
The OLAP-slice data is displayed in working area. In its upper part there is a menu for the quick access to the frequently used commands[2]. The rest is occupied by the current OLAP-slice and consists of the following parts - Cube Axis headers, Cube Axes, Data Axes, Data Axis headers, Chart Panes.

You can change the view of the slice by relocating measures and hierarchies within the environment panel. When you start dragging an element, all the possible locations, where it can be dropped to, will be highlighted. Most elements have context menus that duplicate the mouse actions and provide additional control functions for managing the slices' view.

Grid working area

Case Type		Resolved	Total
Problem Category	Problem Type		
Accessories	Apple Wireless Mouse	25.82	25.82
	Time Capsule	19.90	19.90
	Airport Base Station	17.15	17.15
	Apple Wireless Keyboard	16.42	16.42
	Apple TV	16.07	16.07
	Accessories	95.35	95.35
Services	Complains	22.72	22.72
	Loyalty Scheme	17.42	17.42
	AppleCare	17.17	17.17
	Sales	14.75	14.75
	Apple Rental	10.77	10.77
	Buy Back Scheme	8.73	8.73
	Services	91.55	91.55

Chart working area


Problem Categor
Case Type
Resolved
Mobiles
Services
Music Players
Accessories
Cube Axis
Cube Axis headers
Chart pane
Data Axis
Data Axis Headers
Time Spent [hrs]
24.00
20.00
16.00
12.00
8.00
4.00
0.00
iPhone
iPhone 3G
Sales
AppleCare
Loyalty Scheme
Apple Rental
Buy Back Scheme
Complains
iPod Shuffle
iPod Nano
iPod Classic
iPod Touch
Airport Base Station
Apple TV
Apple Wireless Mouse
Time Capsule
Problem Type
Problem Type
Problem Type
Problem Type

17.2 Working with the OLAP grid

The OLAP Grid view is comprised of a multi-dimensional table with expandable nodes. These nodes group and display data according to the hierarchies used to define the measures and dimensions upon which the underlying data has been organized. In tandem with the OLAP Chart view, the OLAP Grid view provides an ideal means of clearly conveying data to the user. It is highly navigable and quickly provides detailed information to the user. The speed with which data recall occurs and the strong formatting the grid enforces ensure data is always presentable and easily understandable. Consequently, OLAP Grid views can easily be ported to spreadsheet applications for report compilation purposes.

Additionally, the OLAP Grid view allows users to effortlessly add and remove categories, filter and sort categories, and drill up or drill down on data using powerful built-in menus. One of the greatest benefits this affords is that it allows users to explore, navigate and refine data until the desired snapshot is achieved. Once in place this snapshot can then be reflected in a complementary chart. This is possible as OLAP operations in Grid view can be synchronized with Chart view. These two data views can then be deployed side-by-side or on top of one another.

- *Unicode support.*
- *Simultaneous display of several different measures in the Grid.*
- *Simultaneous drilling down based on different parameters: up to the nearest child, up to the next level, up to the next hierarchy.*
- *Saving and restoring the current OLAP-slice.*
- *Hierarchy members grouping (including multilevel and parent-child hierarchies).*
- *Separate sorting on different hierarchy levels. Possibility to override any sorting method.*
- *Ascending or descending sorting based on the cell values in any column of the Grid.*
- *Filtering of hierarchy members with or without applying these filters to the OLAP calculations.*
- *Auto filtering of the hierarchy members depending on their values in the Grid. Major/minor members selection, either based on their rank or on the Pareto principle.*
- *Replacing hierarchy members by drag-n-dropping them within the Grid.*
- *Auto sizing of cells depending on their contents.*
- *Flexible export to MS Excel, HTML, GIF, JPG, PNG, BMP, CSV, TXT, PDF formats.*

Operating the OLAP-slice

The OLAP-slice data are displayed in a table, whose appearance may be amended to some extent. For operating the current OLAP-slice there are the following functions available:

1. **Navigation**
2. **Selecting and copying data**
3. **Drilling, sorting and moving hierarchy members**
4. **Operating context menus**
5. **Filtering data**
6. **Editing data**
7. **Setting the column width**

1. Navigation - You can easily navigate the data using the keyboard:

Button	*Action*
Home	Move to the first cell of the row
End	Move to the last cell of the row
PageUp	Move one page up
PageDown	Move one page down
Ctrl+Home	Move to the top left cell
Ctlr+End	Move to the bottom right cell

Using the mouse, you can scroll the table up and down.

Mouse Action	*Component Action*
Scrolling the mouse wheel	Vertical scrolling of the table
Scrolling the mouse wheel with the Shift button held down	Horizontal scrolling of the table

2. Selecting and copying data - The data area in the component can be selected like everything else in Windows:

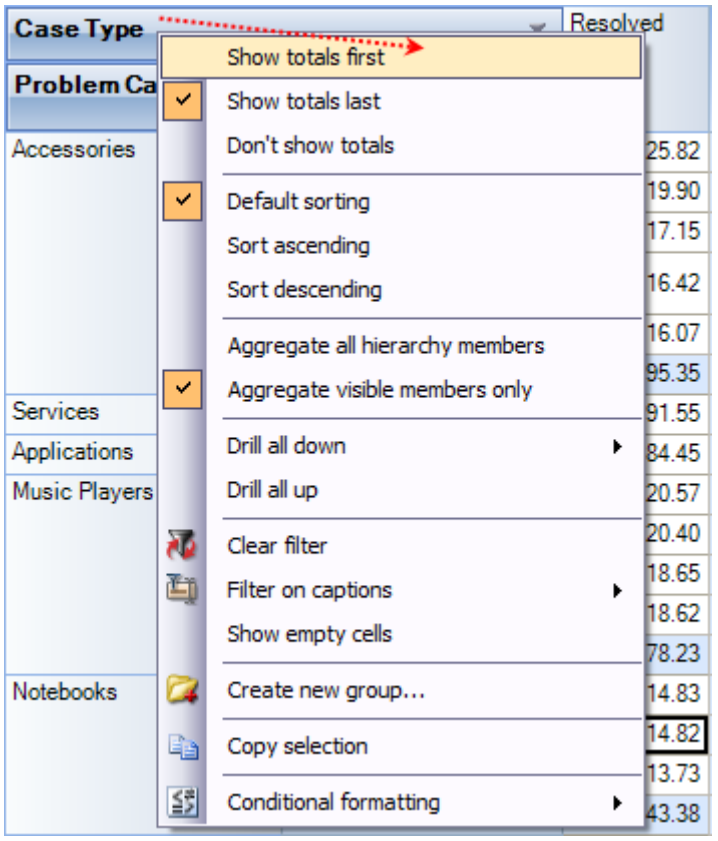
- Select all the cells pressing **Ctrl+A**;
- Capture the area with the mouse;
- Change the boundaries of the selected area with direction buttons, holding down the Shift button.

You can copy the data from the selected area to the clipboard by pressing **Ctrl+C**. If there's no selection, pressing these buttons will copy the whole OLAP-slice to the clipboard.

3. Drilling, sorting and moving hierarchy members - To perform the drilling of the hierarchy members press buttons on the Grid cells. If there's only one drilling button in a cell, then, instead of pressing it, you can double-click the cell itself. By default, the drilling buttons are shown only in the cells under mouse. To see all the buttons, press the Ctrl button. The last cells in the column area of the hierarchy members allow showing the sorting direction. A pointer that indicates the descending order of data illustrates it. You can manage the sorting modes by single clicking on the cells of the specified area: they are changed cyclically [descending sorting] -> [ascending sorting] -> [no sorting].

Case Type		Resolved	Total
Problem Category	Problem Type		
− Accessories	Apple Wireless Mouse	25.82	25.82
	Time Capsule	19.90	19.90
	Airport Base Station	17.15	17.15
	Apple Wireless Keyboard	16.42	16.42
	Apple TV	16.07	16.07
	Accessories	95.35	95.35
Services	Complains	22.72	22.72
	Loyalty Scheme	17.42	17.42
	AppleCare	17.17	17.17
	Sales	14.75	14.75
	Apple Rental	10.77	10.77
	Buy Back Scheme	8.73	8.73
	Services	91.55	91.55

4. Operating context menus -The context menu, called by right clicking a table cell, partly duplicates the OLAP-slice control functions.

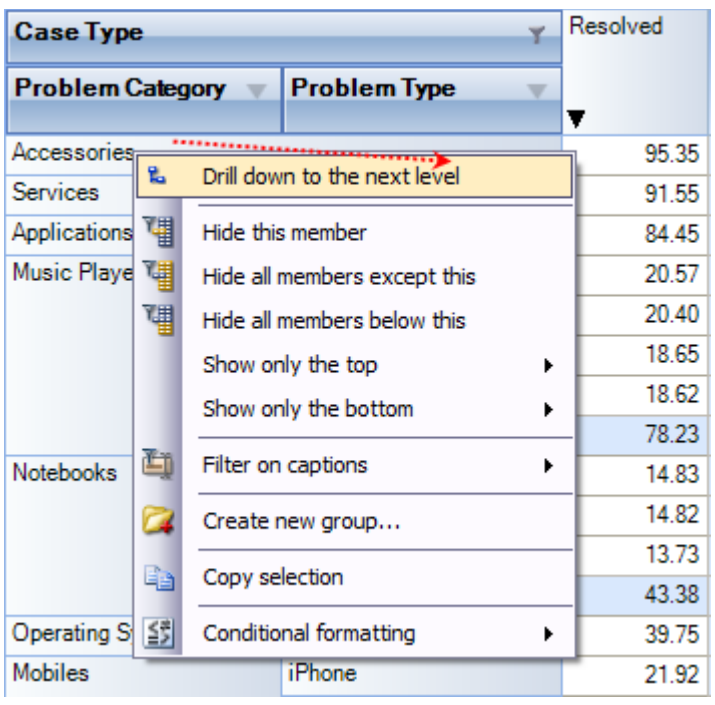


Hierarchy levels' menu

The view of context menu of the hierarchy levels' area. There is a list of commands available in the context menu of the hierarchy levels' area:

Command	*Function*
Show totals first	Show the aggregated cells before all the rest
Show totals last	Show the aggregated cells after all the rest
Don't show totals	Do not show the aggregated cells
Default sorting	Range hierarchy members by default
Sort ascending	Range the hierarchy members by values from the bottom to the top
Sort descending	Range the hierarchy members by values from the top to the bottom
Aggregate all hierarchy members	Aggregate all the hierarchy members (including hidden)
Aggregate visible members only	Aggregate the visible hierarchy members only
Drill all down\ to the next hierarchy	Drill all down to the next hierarchy
Drill all down\ to the next level	Drill all down to the next level
Drill all down\ to the same-level children	Drill all down to the same-level children
Drill all up	Collapse all the elements of this level
Clear filter	Remove any applied filters
Filter on captions	Set the filter for measures
Show empty cells	Show the cells with no aggregated values
Create new group …	Create a new group. It will appear at the first level of the hierarchy
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show the Conditional formatting menu

Hierarchy members' menu

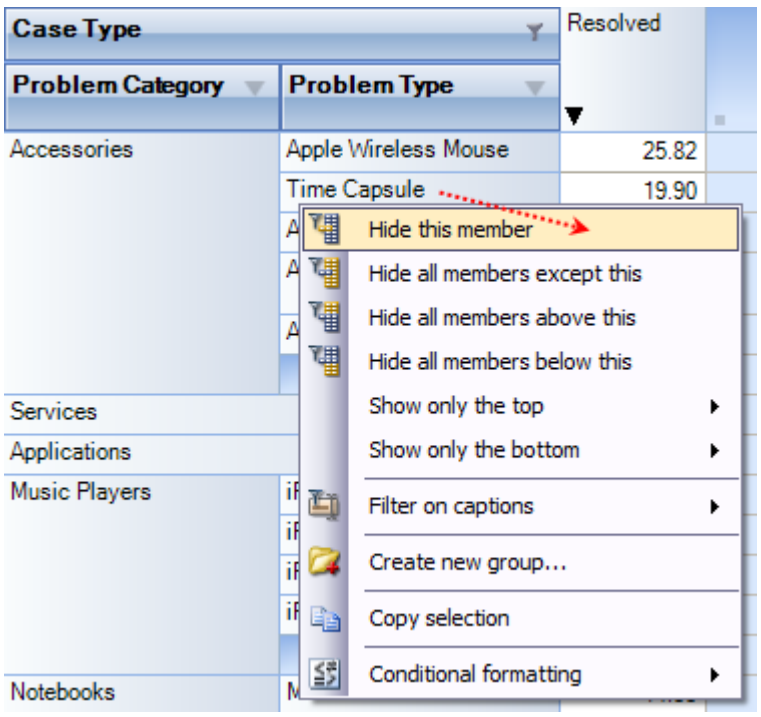


The view of the context menu of the hierarchy members' area

Command	*Function*

Drill down to the next hierarchy	Open the node up to the next hierarchy in the current area, ignoring all the lower levels of the current hierarchy
Hide this member	Hide the member
Hide all members except this	Hide all the members of the hierarchy, except the selected one
Hide all members above this	Hide all the members of the hierarchy above the selected one
Hide all members below this	Hide all the members of the hierarchy below the selected one
Show only the top	Show the top elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Show only the bottom	Show the bottom elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Filter on captions	Set the filter for measures
Create new group..	Create a new group on the current level
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show the Conditional formatting menu

The menu for groups of hierarchy members

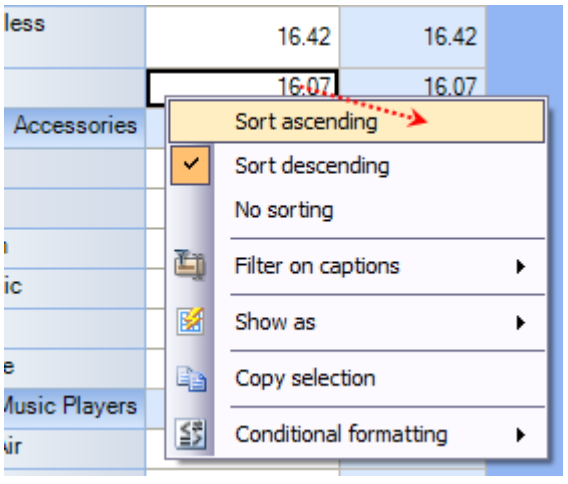


The context menu that appears above the group cell.

Command	*Function*
Hide this member	Hide the selected member

Hide all members except this	Hide all the hierarchy members except the selected one
Hide all members above this	Hide all the hierarchy members above the selected one
Hide all members below this	Hide all the hierarchy members below the selected one
Show only the top	Show the top elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Show only the bottom	Show the bottom elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Filter on captions	Set the filter for measures
Create new group	Create a new group
Delete this group	Delete the selected group
Clear this group	Clear the selected group
Rename this group	Rename the selected group
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show conditional formatting menu

Measure values' menu



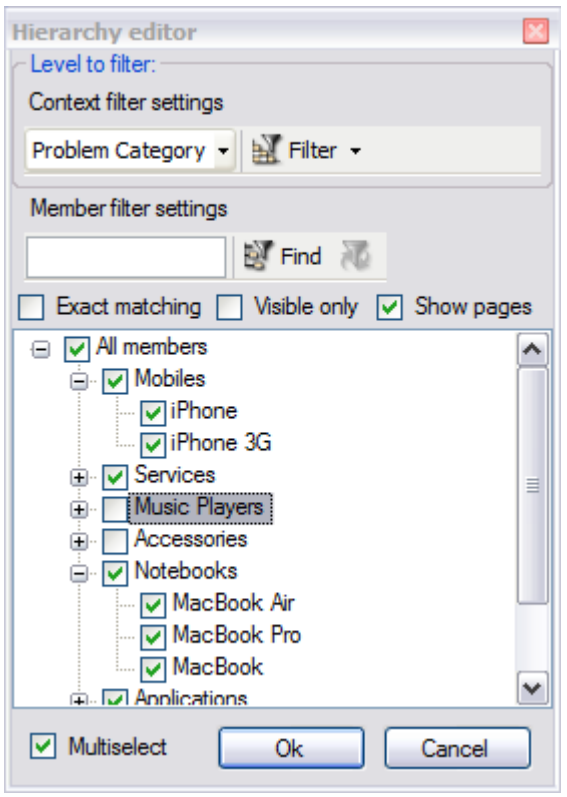
The context menu that appears above the group cell:

Command	*Function*
Sort ascending	Range the cells in the column by values from the bottom to the top
Sort descending	Range the cells in the column by values from the top to the bottom
No sorting	Remove any sorting
Filter on captions	Set the filter for measures
Hide these measures	Hide the selected measure
Show as	Specify the display mode of the current measure in the Grid: default percent aggregated value in the row percent parent element of the row percent parent element of the column percent total aggregated value

Copy selection	Copy the selected area to clipboard
Conditional formatting	Show conditional formatting menu

5. Filtering data - The filtered elements (hierarchies or measures) are automatically placed on the filters' panel. To start filtering, move the element to the filters' panel. In case the element has not been filtered, the appropriate editor will launch (the Hierarchy Editor for hierarchies and the Measure Filter Editor for measures). In the filters' panel, you can launch an editor for each element independently.

The buttons for launching the editor ( ) are placed on the panels in the Hierarchy levels' area. If the button looks like this ( ), it means the hierarchy had hidden members inside. Pressing the button starts the Hierarchy editor.



6. Setting the columns' width - You can change the width of columns in the data display area by dragging the right boundary with the mouse. If possible, these changes will be saved during other operations with the table (like drilling, sorting, etc.) To return to the original width, double click the right boundary of the column where it is visible. In case there were such changes in the table that saving the assigned width of the columns was impossible (for example, if as a result of the Collapse drilling, the column with the assigned width has disappeared), it will be set automatically. Unfortunately, if you operate a big table, calculating the columns' width takes up too much time. That is why if there are more than 10, 000 cells in your table, their width will be set to default, but it can be corrected later.

17.3 Working with OLAP Chart

While the Grid view allows working with numbers, chart view allows representing your helpdesk data graphically. This gives you and other managers a unique opportunity to **analyze helpdesk data visually**, dealing with charts rather than numbers, which is much easier to perceive. Now it's easier than ever to spot new trends and discover unknown problems in your data flow. The statistical tool will help you gain an insight into your data and make new discoveries.

Tools panel

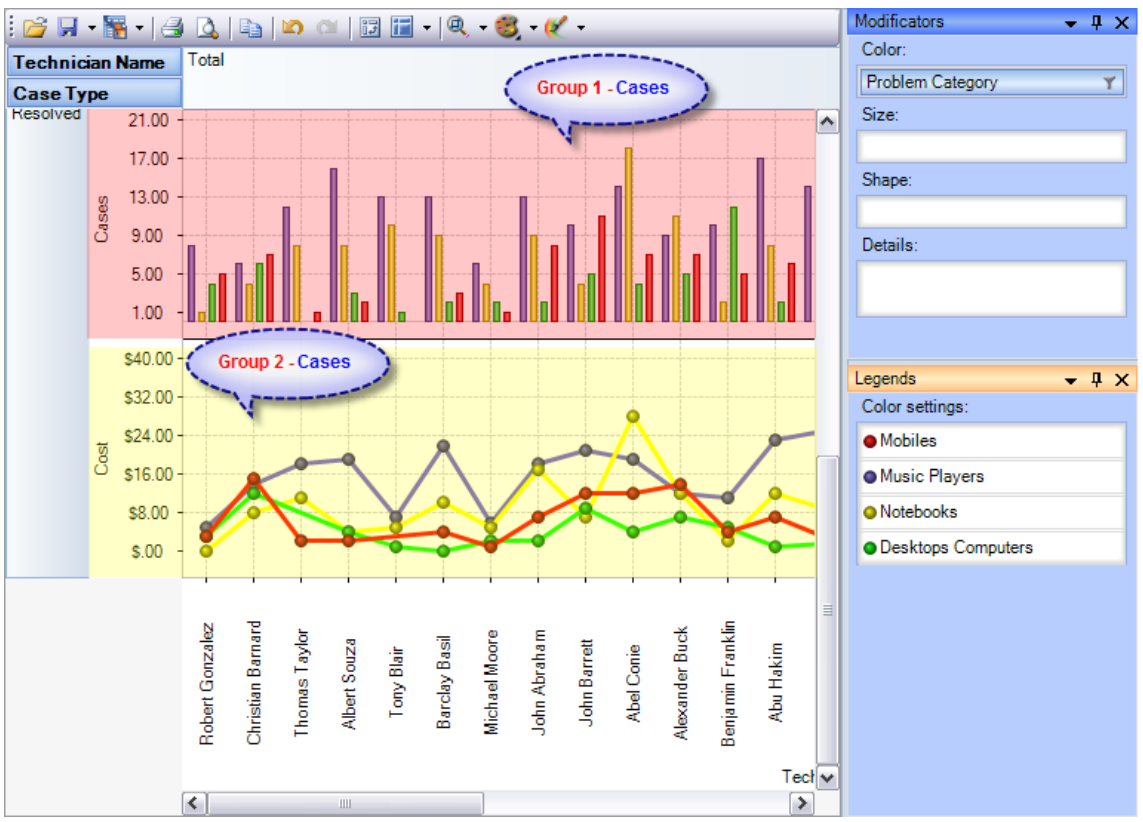
This panel houses all the frequently used operations on the OLAP chart - save, export, print and display options.

Button	*Function*
	Load the Grid state
	Save the Grid state
	Export OLAP-slice data
	Print OLAP-slice data
	Preview
	Undo
	Redo
	Switch axes
	Select the docking panels layout
	Set the scale of Chart display
	Select the color palette for measures

Modifier panel

Modificators are easy and powerful means of data representation. You can choose your data be shown in different colors, using different shapes and sizes, so that you can easy distinguish them in a single graph. You can simply place a dimension or a measure on a modificator's pane and get the graph showing different values in a different manner.

For example, you might place the "Problem Category" dimension on Color pane and get the Chart showing problem categories in different colors. Or you can place the "Cost" measure on Color pane to highlight the top rates of supporting the service requests. The same can be done for Shape and Size so that you can make your data perfectly distinguished.



The layout of panels and hierarchies on the Modifier panel allows you to change the appearance of the displayed slice. When an element is placed to the modifier panel (except for Details), its legend will contain the display parameters. If you modify the color and shape of an element, the appropriate parameters can be amended.

Modifier	The changes made upon placing a Chart element to the modifier area of...	
	a measure	***a hierarchy***
	The color of the Chart elements will be chosen from the standard set of gradient colors	Hierarchy members will be painted with the colors from the current palette
Color	The elements with the minimal value will be painted with the first of the gradient colors, and the elements with the maximal value - with the last one	N/A
Size	Depending on the value of the measure the size of the Chart points will vary from the minimal to the maximal.	Hierarchy members will differ in size
Shape	Forbidden	Hierarchy members will differ in shape. If the number of hierarchy members will exceed the number of available shapes, some of them will be used more than once
Details	Forbidden	The panels will display series for all hierarchy members

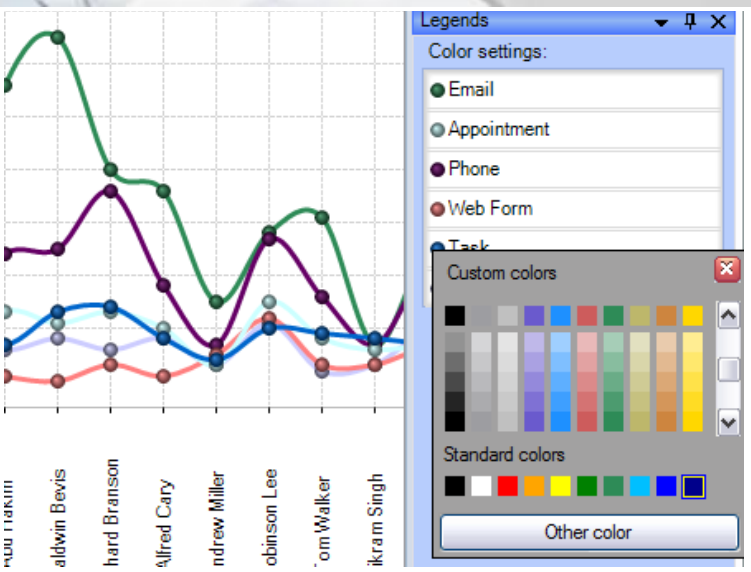
If a measure is placed on the Color pane, its values range is mapped to the given colors range so that it’s tremendously easy to spot the top/low values. If you select the discrete gradient type, you'll be able to set threshold values for filling the Chart elements. While the continuous gradient will let you evaluate the trend as a whole. To select the gradient type and tune its content, turn to the legend panel.

The Legend panel

The panel contains descriptions of the modified elements. The value, shape and color of a legend element can be edited.

Setting the Color legend

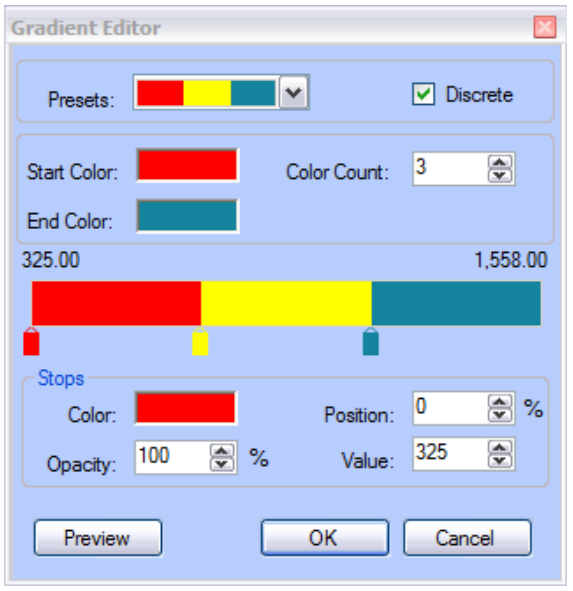
To select a color, simply double-click the appropriate element and choose a color from the pop-up editor.

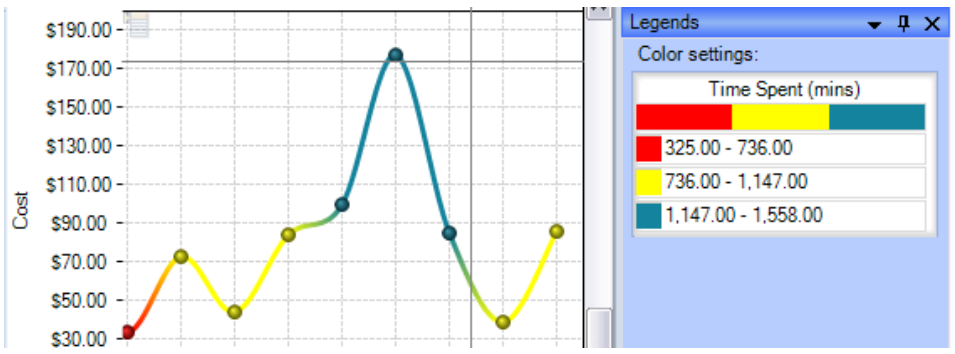


Setting the Gradient legend

To edit the gradient, double-click the element and tune the settings in the editor. In the Gradient Editor there are:

- a set of pre-made gradients;
- selecting gradient option (continuous or discrete);
- creating a gradient with a set number of intermediate colors option;
- setting threshold in per cent and measure values option;





Selecting threshold color option.

Setting the Shape legend

The shape selection is made through the context menu. This option is available only for points or lines Charts. If the number of hierarchy members exceeds the number of available shapes, they will be repeated.

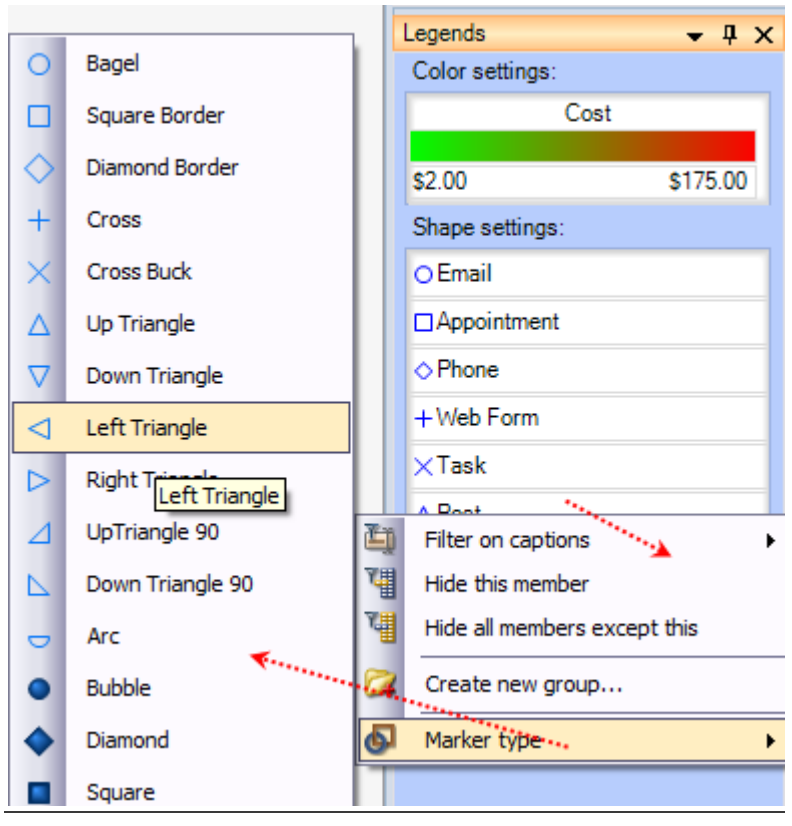
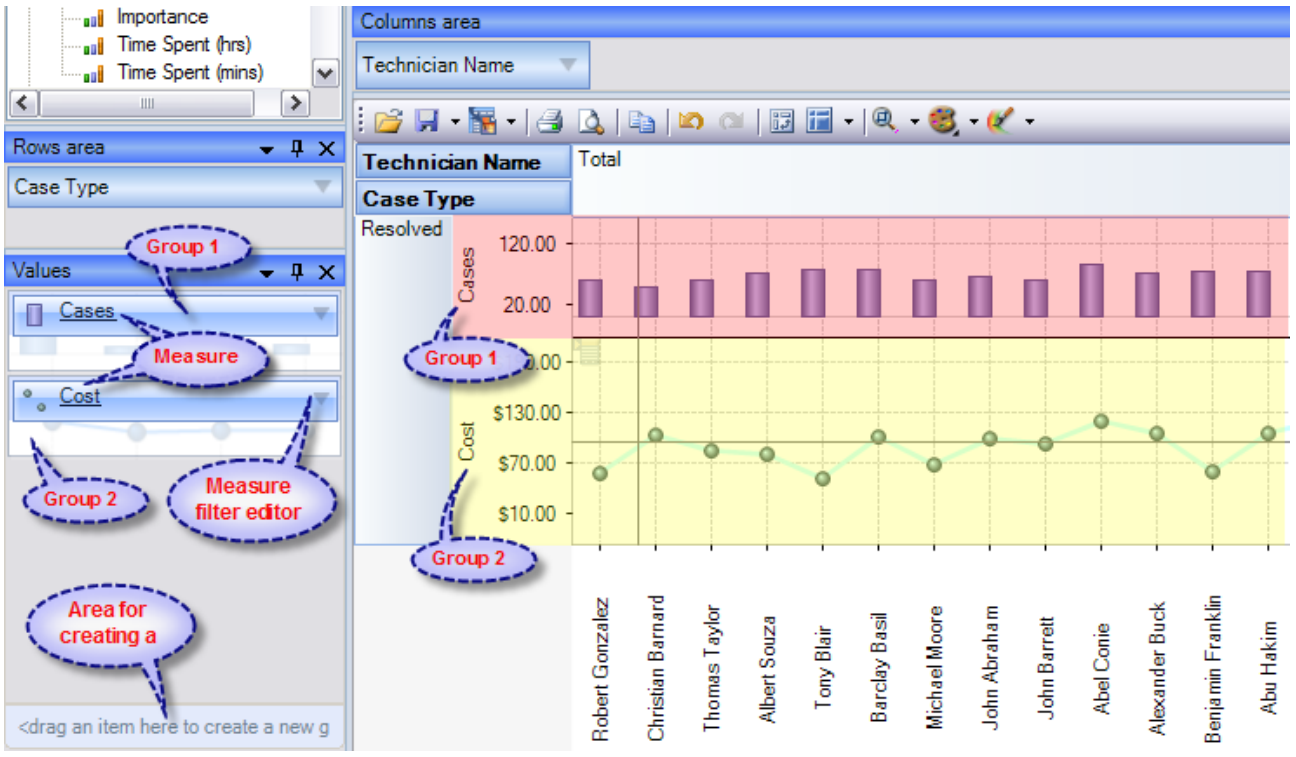


Chart Panes

The bulk of the OLAP-slice data are placed into cells with Charts. Each measure group has its own set of panes.



Measure groups with corresponding Charts in the working area

Chart Type

In the upper left part of each Chart, there will appear a context menu for selecting its type. There are six (6) charts that you can use, namely, *Point Chart, Histogram, Point Shape Selection, Lines, Curved lines and Step lines.* By default, the Histogram is used.

The size of Charts can be changed to some extent. To expand a Chart along either one of the axes, you need to capture its boundary with the mouse and drag it. You can change the size along both axes (and return to default) through the tool menu in the upper part of the working area.

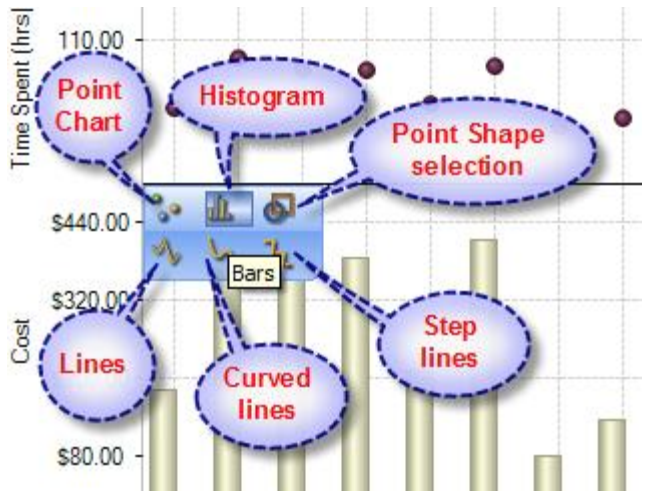


Chart type menu

Hot keys for changing the scale	
Ctrl+*	Reset Scale to 1:1
Ctrl+Num+	Zoom In
Ctrl+Num-	Zoom Out

Navigation

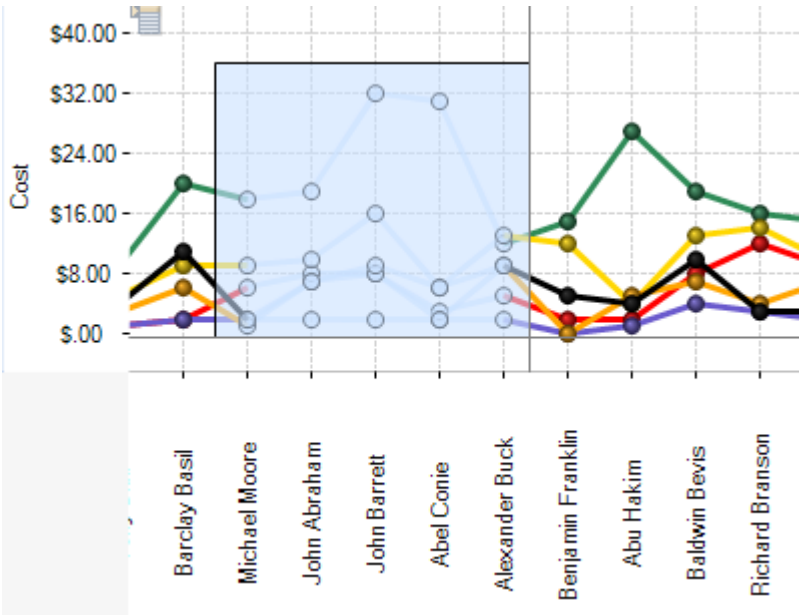
If the content of the Grid exceeds the client area, the scroll bars will appear. You can scroll down the data using the mouse wheel. To scroll the Grid in the vertical direction, turn the mouse wheel, while holding Shift.

Selecting Data

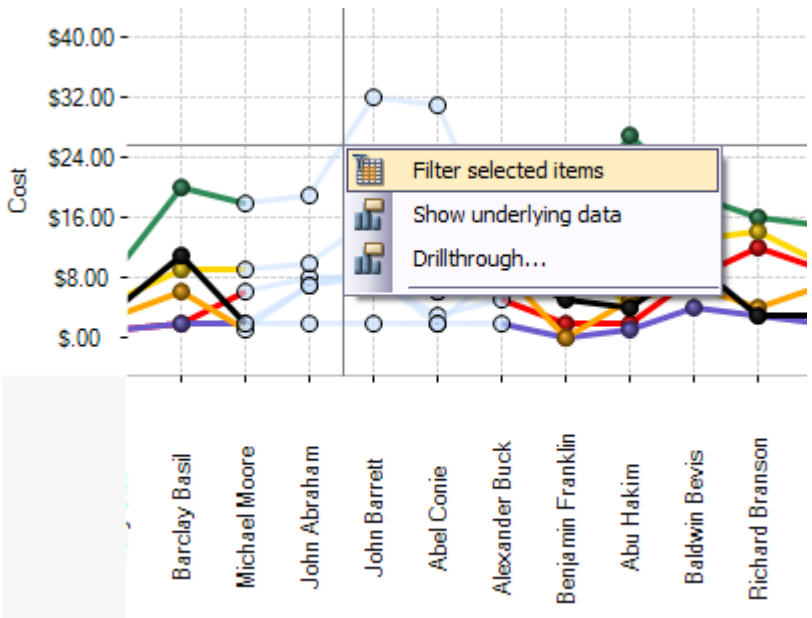
You can select Chart points with the standard Windows' method. Holding down the Ctrl button, you can add selected points, holding down the Shift button, you can select the horizontal range. You can filter the Grid's points while selecting. In that case, the corresponding hierarchy members will be filtered automatically.

Selecting and filtering parts of Charts

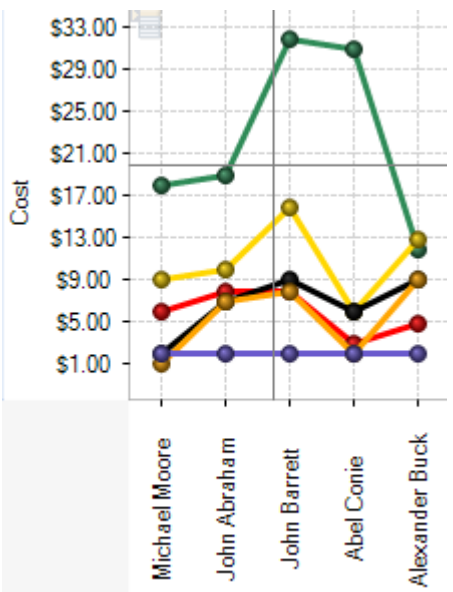
a. Selecting some of the Chart points



b. Selecting the Filter command



c. The result



Note: When moving the mouse cursor over a data axis, you are able to select a continuous range of members (if the axis is composed of them) or a range of values in Charts.

Filtering hierarchies

In case you need to collect data not from the whole Grid, but just from a part of it, the component has a few functions at your

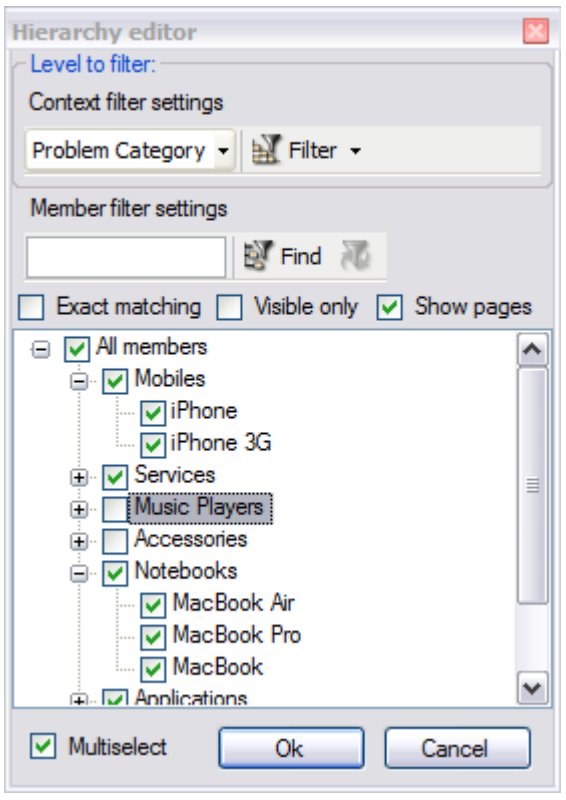
disposal: they let you select or remove elements from the slice. Also, there is a standard option of exporting data into a number of formats and printing out the content of OLAP-slices. The simplest way of selecting data is through the context menu. When you click a hierarchy member on the Cube axis, there is a set of commands for quick operations with members:

- Hide this member
- Hide all members except this
- Hide all members above this
- Hide all members below this

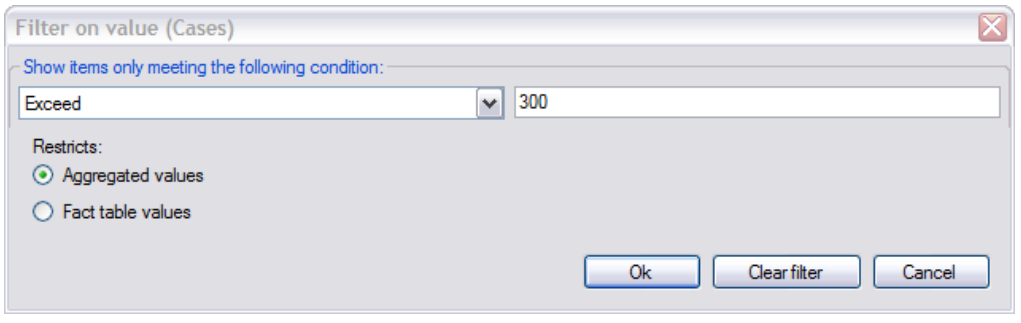
Filter on hierarchy level
The Filter area of the Editor becomes visible only in case if filtering by hierarchy levels is available. To apply a filter to hierarchy members, you need to select a hierarchy level (if there's more than one) and assign the Filter condition in the Filter menu. In the same menu, there's a command to clear filter.

Filtering hierarchy members
If the search field is not empty, the "Find" command will make the component perform a search for hierarchy members, whose levels contain the specified string. You can narrow the search results by checking the "Exact matching" box.

Filtering a single member of a hierarchy
By default, the Editor is able to select any number of hierarchy members. To switch to the single-select mode, uncheck the "Multiselect" box. In that case, only one the hierarchy member with all its parents and members will be selected.



Filtering measures
There is a number of available parameters for filtering measures. In the same Editor, you can clear the filter.



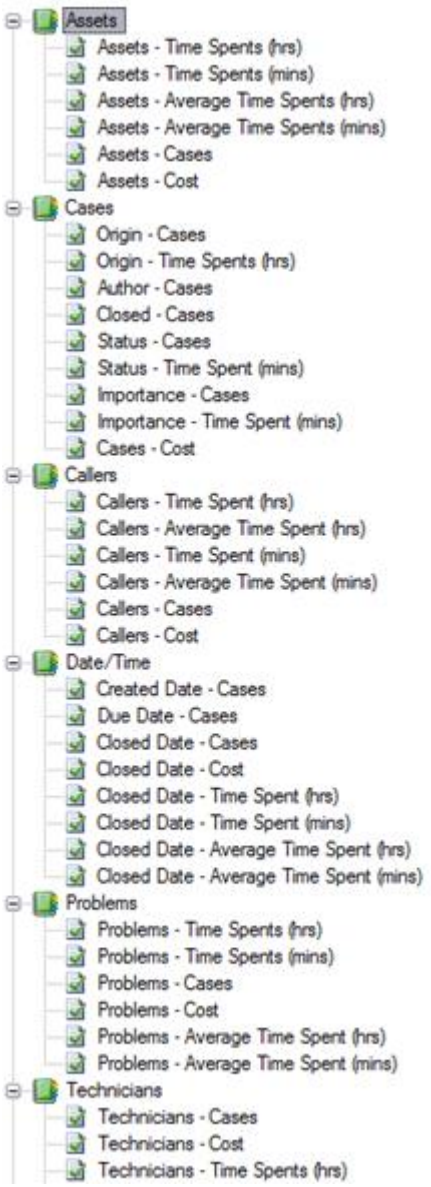
17.4 Predefined Reports

Predefined reports allow helpdesk managers and agents to quickly and easily retrieve information for common inquiries. Reports play a vital role as far as a Help Desk product is concerned. Requests that are open, closed or overdue at any instant of time, which person or company is sending the most number of requests & who is attending to the requests can all be known from the readymade reports available with the statistical tool. Each pre-defined report works in both OLAP grid and OLAP chart view.

There are several predefined reports in each of the report categories, and each report is run directly on a mouse-click from the tree view. Around 40 reports are made available for instant details about the help desk activities. Any of the predefined reports can be also be edited so you can customize the report to return specific results:

- Reports by Cases
- Reports by Callers
- Reports by Date/Time
- Reports by Problems
- Reports by Agents

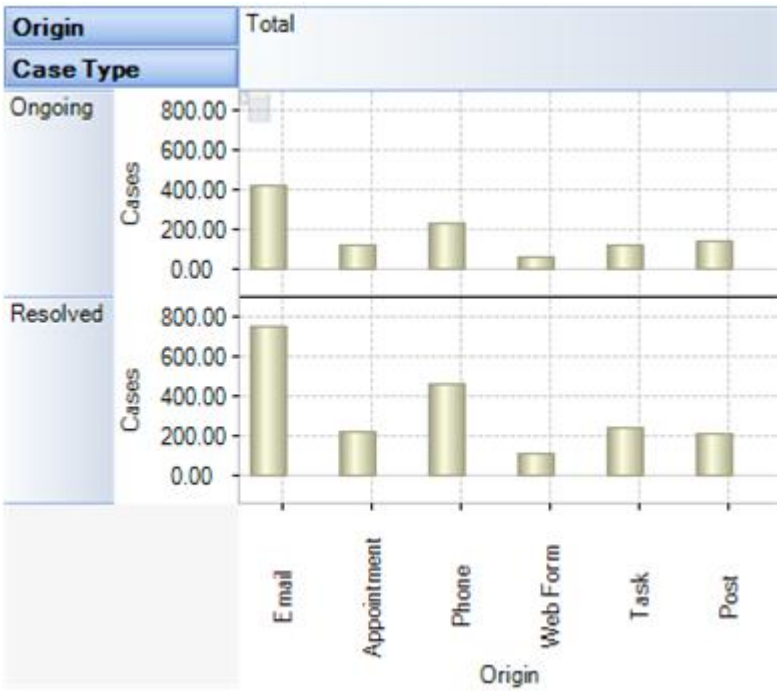
All these categories have reports available based on Priority, Requester, Agent, Category and Request Date.



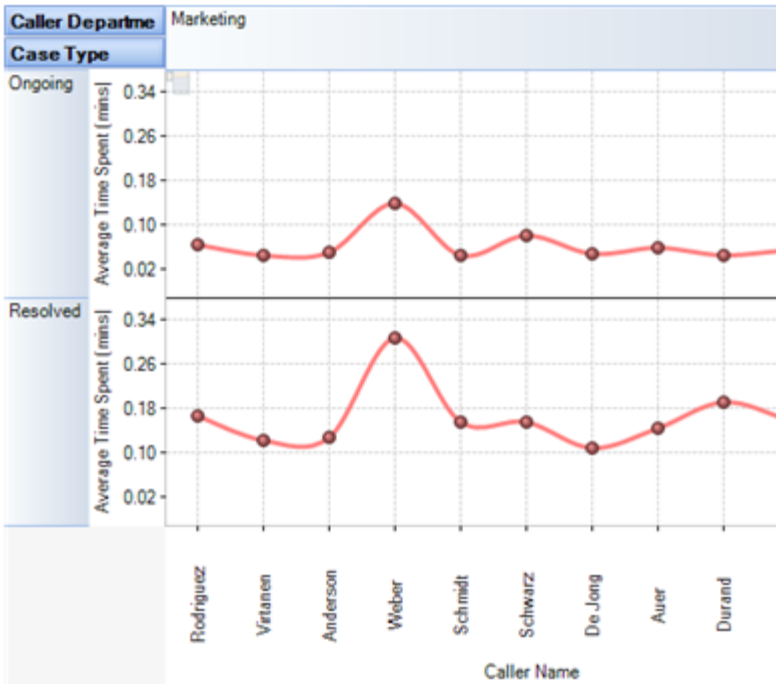
Some sample OLAP charts of the predefined reports

A) Time spent on Asset

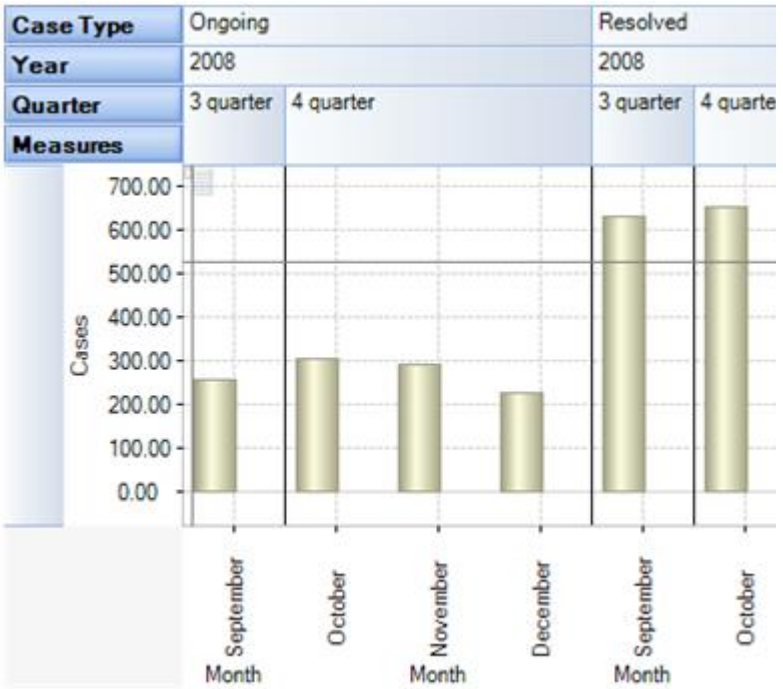
B) Cases Count by Origin



C) Average time spent on caller

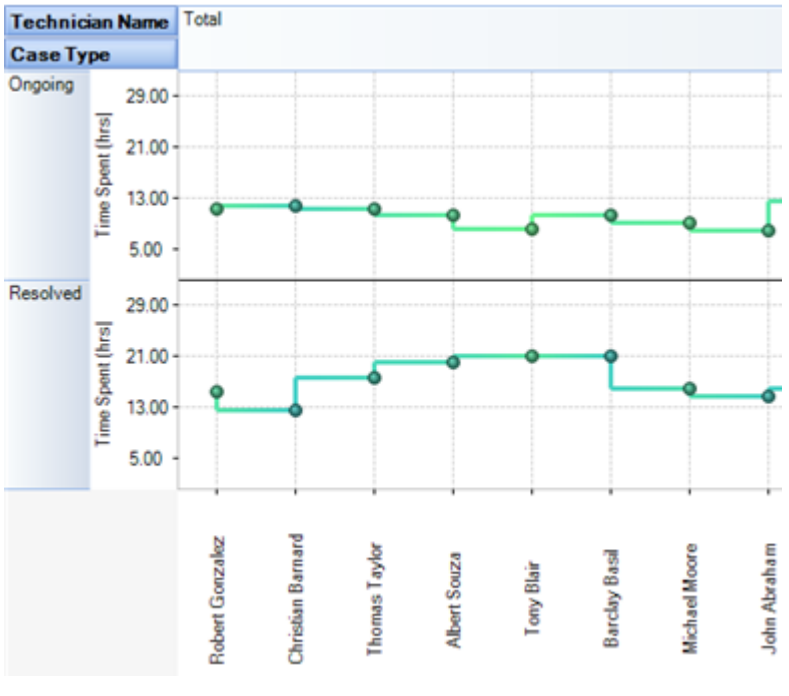


D) Due date



E) Cost per problem category

F) Time spent by agent



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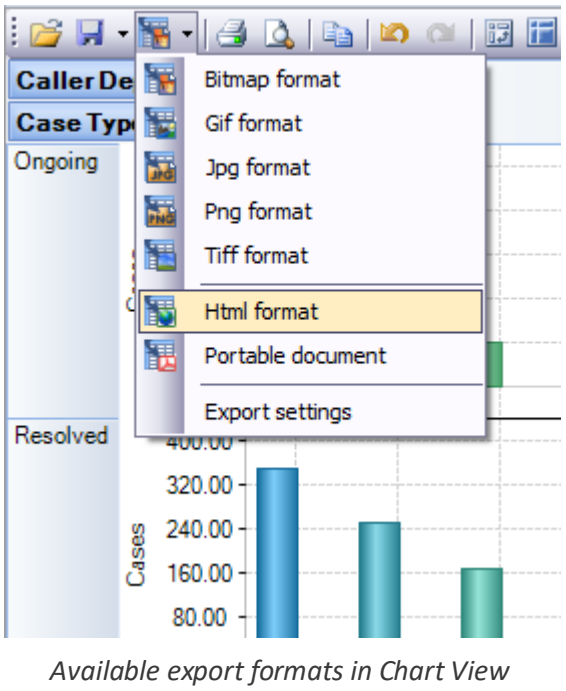
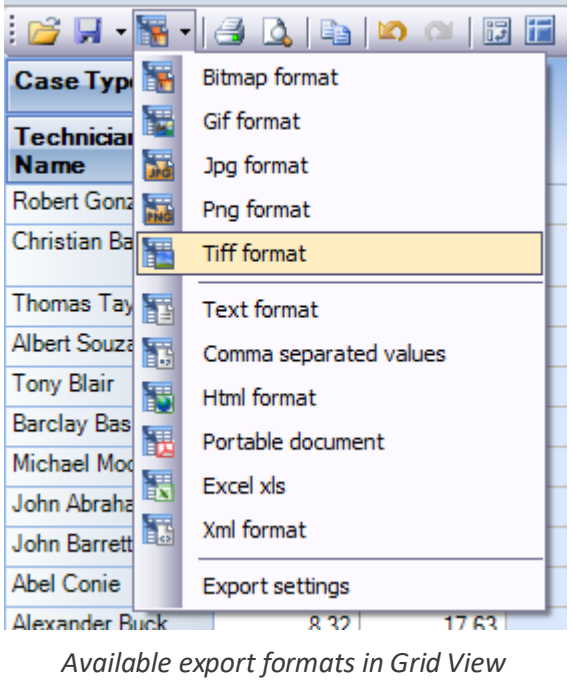
17.5 Printing, exporting statistical data and charts

Now that you have successfully designed a report, you might want to save it for future reference or share it with others. Reuse your work! You can now save data snapshots to HTML, BMP, CSV, GIF, HTML, JPEG, PDF, PNG, TIFF, TXT, XLS and XML as a simple way of reusing your data for documents and spreadsheets. Depending on the active view (Grid or Chat), the saved file would either take the grid data or the chart.



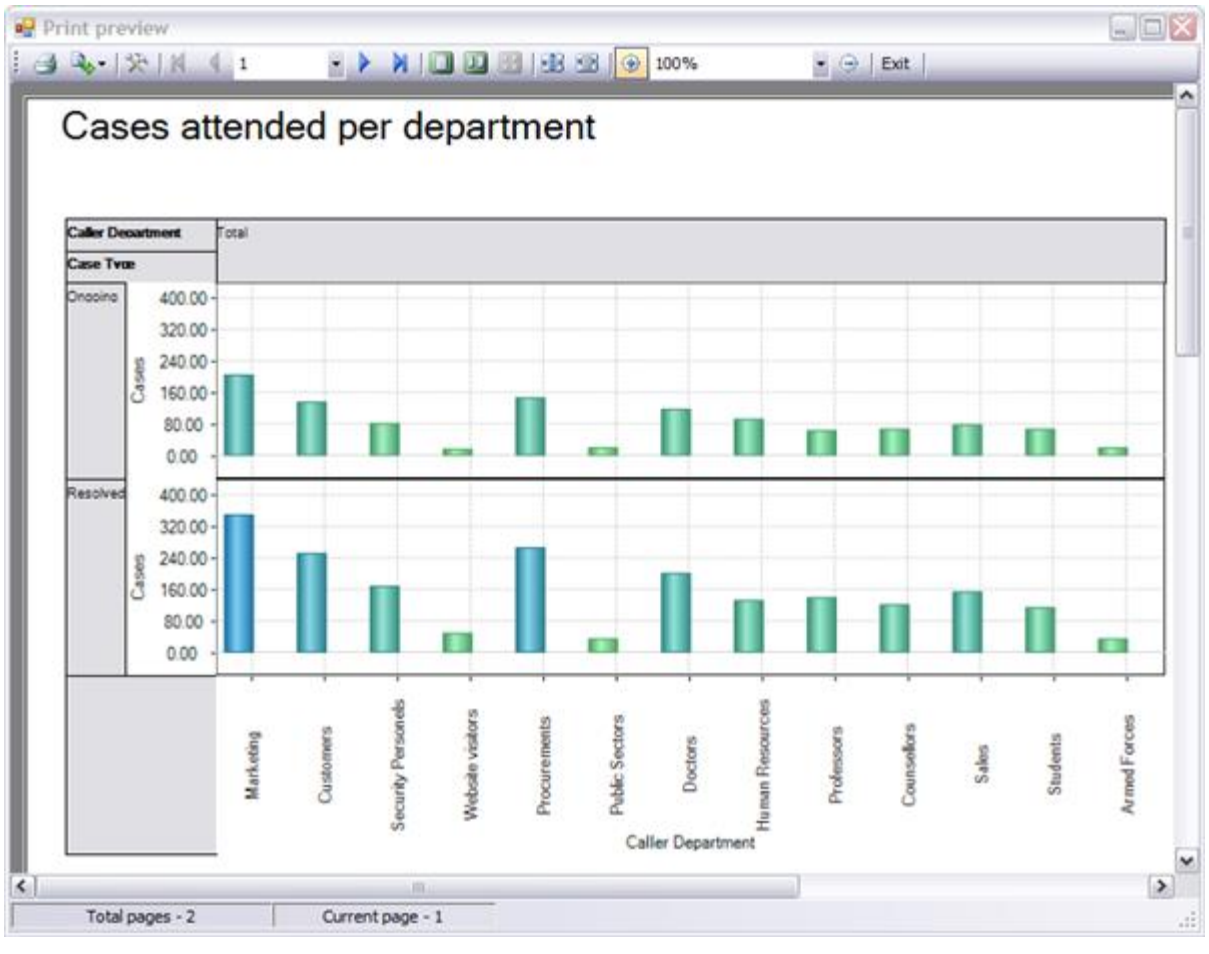
Available export formats in Chart View



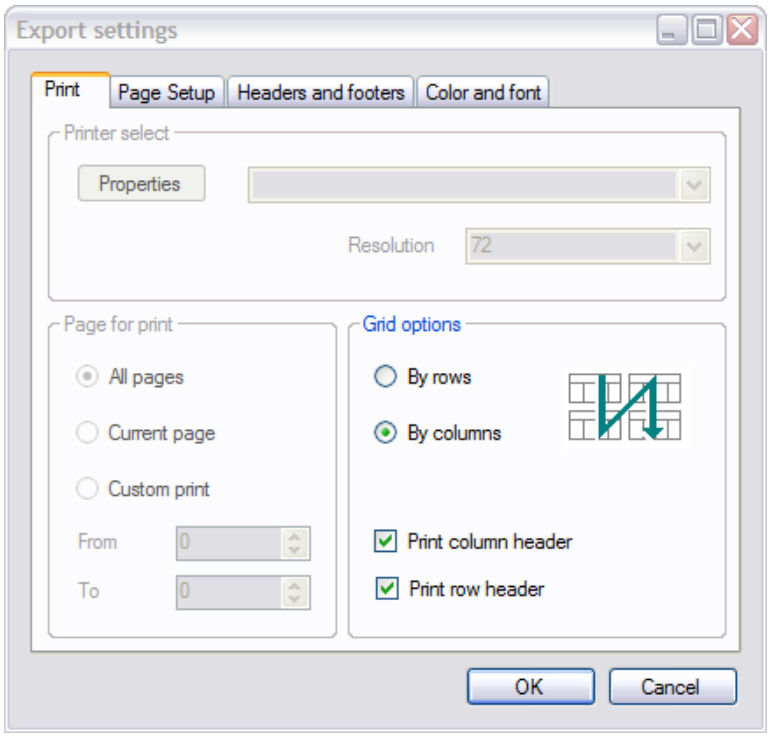
Available export formats in Grid View

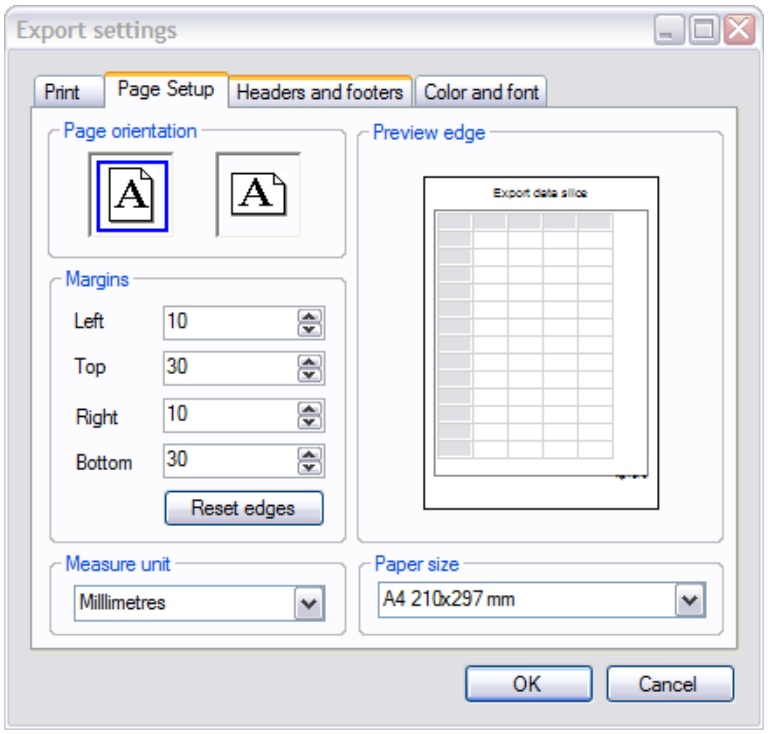
Printing

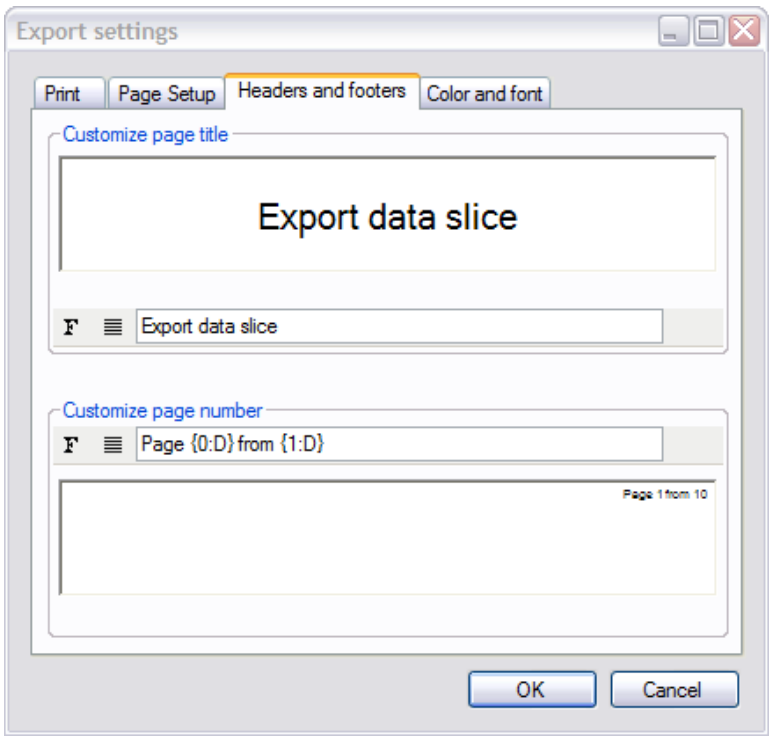
You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

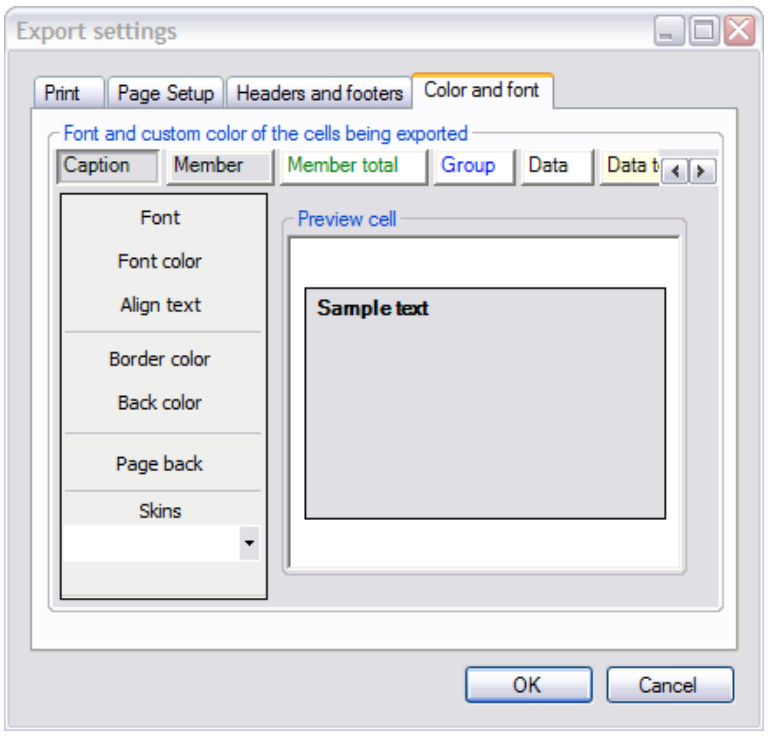


Export Settings -This tool allows you to customize the appearance of the reports to be printed or saved to a file format. You can specify the page size, orientation, headers & footers and color of the fonts and page background.





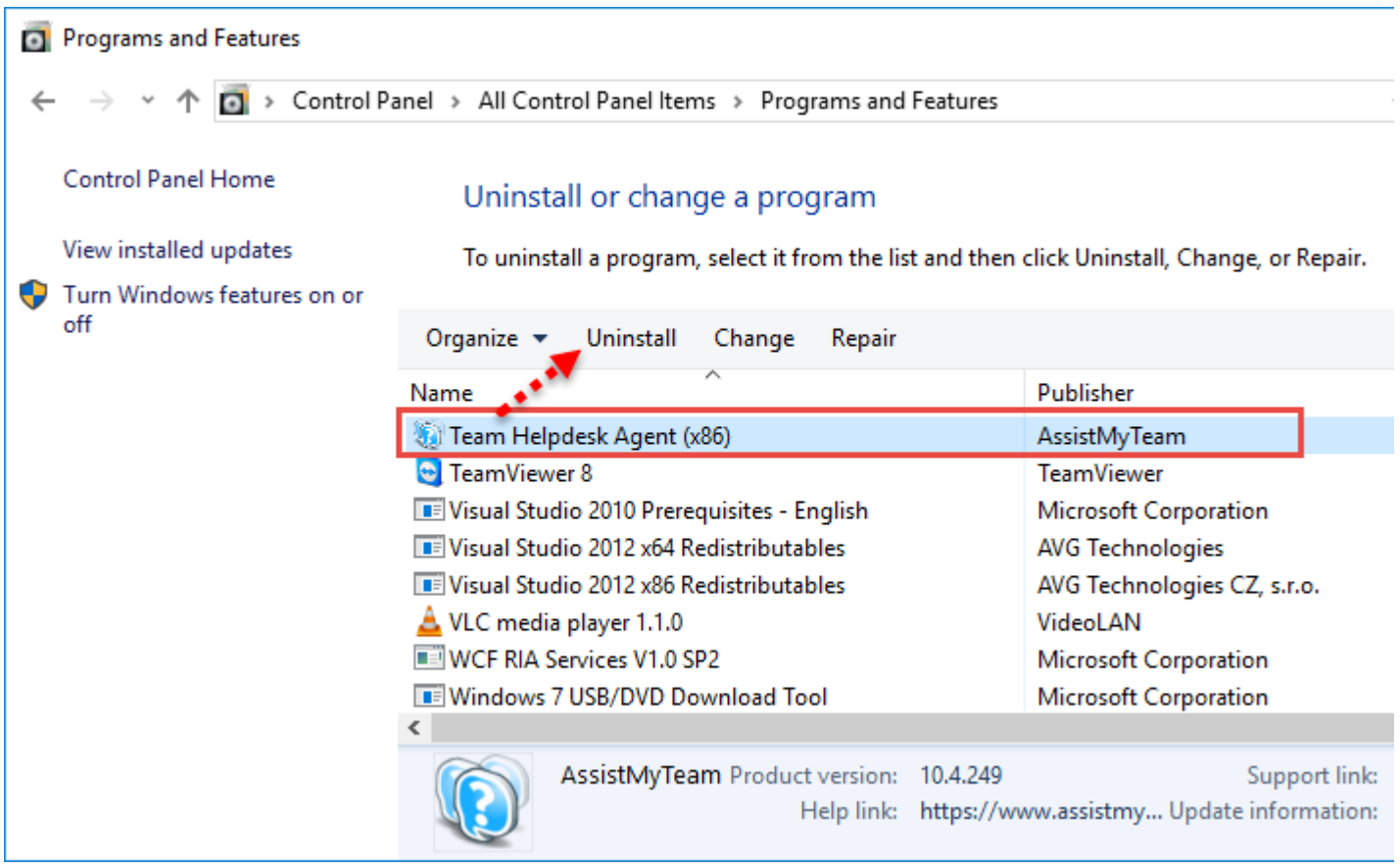




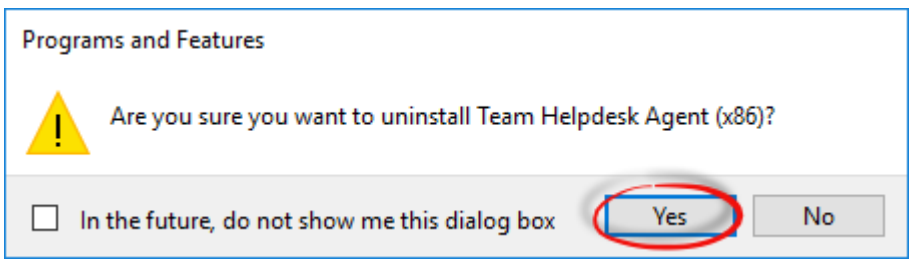
18. Uninstalling Helpdesk Agent add-in

To uninstall the AssistMyTeam Helpdesk Agent add-in from your computer, follow the steps outlined below:

Step 1: Go to '**Control Panel > Programs and Features**'. Scroll down to select '*AssistMyTeam Helpdesk Agent (x86) or (x64)*' and click '*Uninstall*' as illustrated below:



Step 2: A dialog confirmation follows asking for confirmation. Click **Yes**.



Step 3: The AssistMyTeam Helpdesk setup will now start the un-installation process. Make sure that Microsoft Outlook is not running (even under the task manager).

29. Important links

AssistMyTeam Helpdesk for Outlook - Home page
Go to the official website of AssistMyTeam Helpdesk for Outlook.

Video Tutorial clips
Watch video tutorials that teach you how to install, configure and work with AssistMyTeam Helpdesk.

Purchase License
Purchase an enterprise team license for AssistMyTeam Helpdesk for Outlook.

Knowledgebase articles
Looking for an in-depth understanding of this application? Browse through a series of knowledge base articles on AssistMyTeam Helpdesk online.

Support Maintenance contract
At AssistMyTeam, we're committed to give you the best support for all the products that we offer and more! The AssistMyteam Support Contract helps you use our products more efficiently and work out any issues that you encounter during the course of their use.

Submit an online support ticket
Use this web form to create a ticket with AssistMyTeam Technical Support.