AssistMyTeam Helpdesk for Outlook

Help Manual for Administrators


Not just emails, do more with your Outlook
Request for support
Reply with a resolution
Helpdesk for Outlook

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 helpdesk managers and technicians alike how to install, configure, and work with support cases in matter of minutes. 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. Introduction

You have a business that you aim one day to grow and be profitable. If you are one-person support team and have fewer customers, sure, you can provide resolution to their grievances by writing or speaking to them, without logging the details of the customer and nor documenting the nature of the problem. However, what happens if you have a large customer base? Of course, there will be multiple support staffs attending to high number of support requests. **BUT…**

- How would each one of them remember who sent what and who needs what?
- How would John know that Monica has already resolved this particular customer's issue?
- How would you prevent them from working on the same issue concurrently to avert duplicate effort?
- What if Monica solved an issue virtually identical to a separate issue John is currently working on?
- How would John know this issue has been already resolved, so he could use this information to reply to the customer's issue?

For strategic decisions and intelligence, senior managers would certainly like to know how many times this particular problem come up for this particular product has. How long has this problem been an issue for them?

Why a helpdesk system?
It is said that success of a business is measured against the level of customer satisfaction on sales and services. In fact, the higher the customer satisfaction is the repeated business it creates. This is one of the key reasons why successful enterprises have a dedicated help-desk team or call centers to cater to the queries and grievances of their customer base. But what makes a help-desk team productive and successful? Well for sure, choosing the right helpdesk system is the first step that can make all the difference.

But how do you arrive to the decision of choosing a particular helpdesk system? Do you need a helpdesk database system that works standalone within your local network? Or do you need a web-based helpdesk to enable your scattered support personnel to work on troubled tickets? Or do you require a helpdesk that make uses of your existing email infrastructure such as Microsoft Outlook and Exchange?

But why in Microsoft Office Outlook?
Typically, an ideal helpdesk system should support the organizations' internal logic and workflows, integrates easily and leverage existing infrastructures, caters to the support technicians on the move, enables automation and processing based on customizable rules and most importantly, should be easy to use with little or no training requirement. This is where a helpdesk system based on email client such as Microsoft Outlook scores over other type of support systems. This is because in most businesses, most support staffs use Outlook extensively – all day, every day for email communications, appointments, contacts, tasks etc. As they have relied that heavily on Outlook, it is only natural for them to turn Outlook to a sort of a ticketing system to support requests and calls from customers.

Moreover, as Outlook provides quick access to company's contacts, address books, mailboxes and public folders stored on a central Exchange server, it makes it much easier for support personals to track, collaborate and log support requests in Outlook.

The problems with helpdesks based on Outlook
Microsoft Outlook is a great productivity office application, something more of an indispensable companion for many businesses. However, Outlook itself is highly optimized for personal email exchange often falling short when it comes to providing a complete history of an event over time. When an email has been forwarded on to another helpdesk team member, the original owner loses insight into the progress. This has a serious implication, that is, in its original state, Outlook simply lacks the automation, reporting, reminders, and workflow to manage a support ticket request, which is critical for growing helpdesks looking to optimize and uniformly improve support staff/customer interactions.

The Solution - Extending your Outlook
The AssistMyTeam Helpdesk system for Outlook answers these limitations by integrating itself within the Outlook process (as an add-in) and extending it as a platform to collect, track and resolve trouble tickets while sharing this information with your entire team, all with ease. It brings all of help desk functionalities and automation and tightly integrates with the easy workflow of Outlook, thereby allowing users to work in the same way they do with emails. What you would get as an IT manager is high rate of user acceptance, yet low cost of operation, training and maintenance.

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 technicians
- 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

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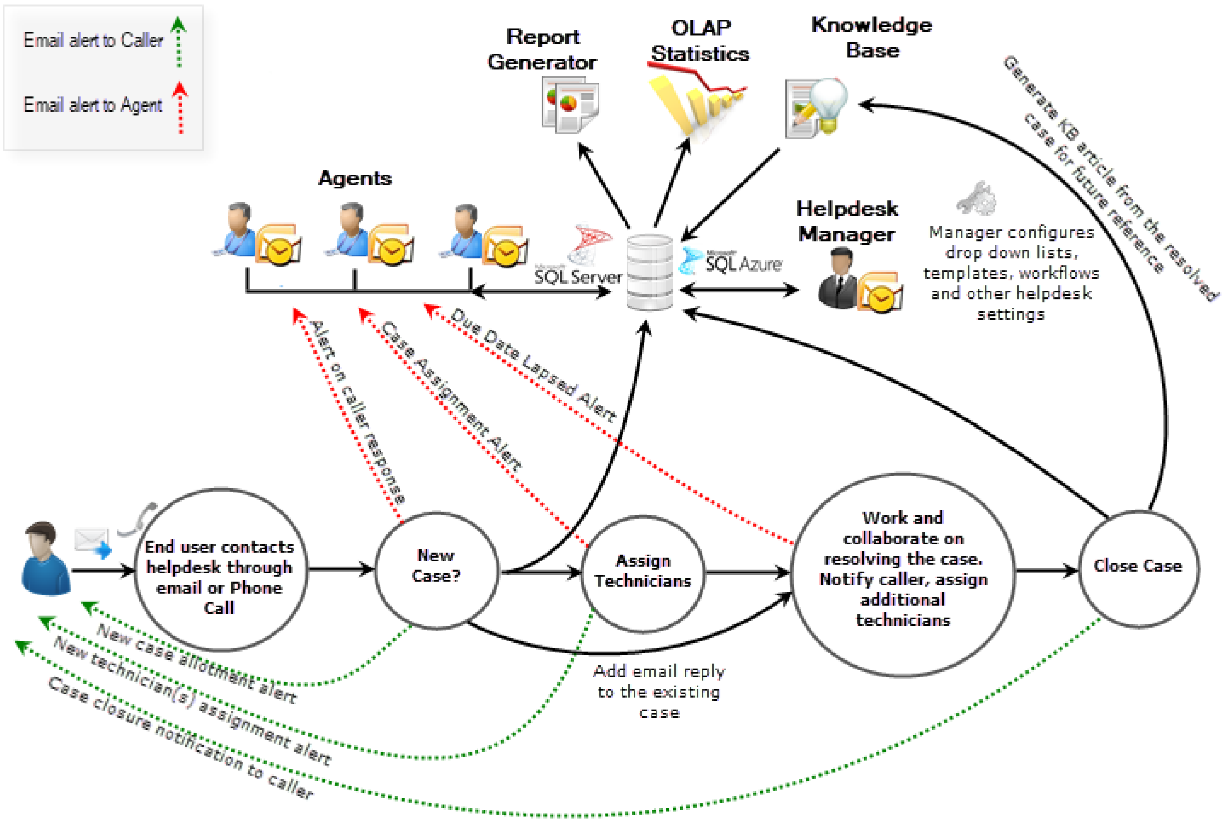
How It Works?

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.



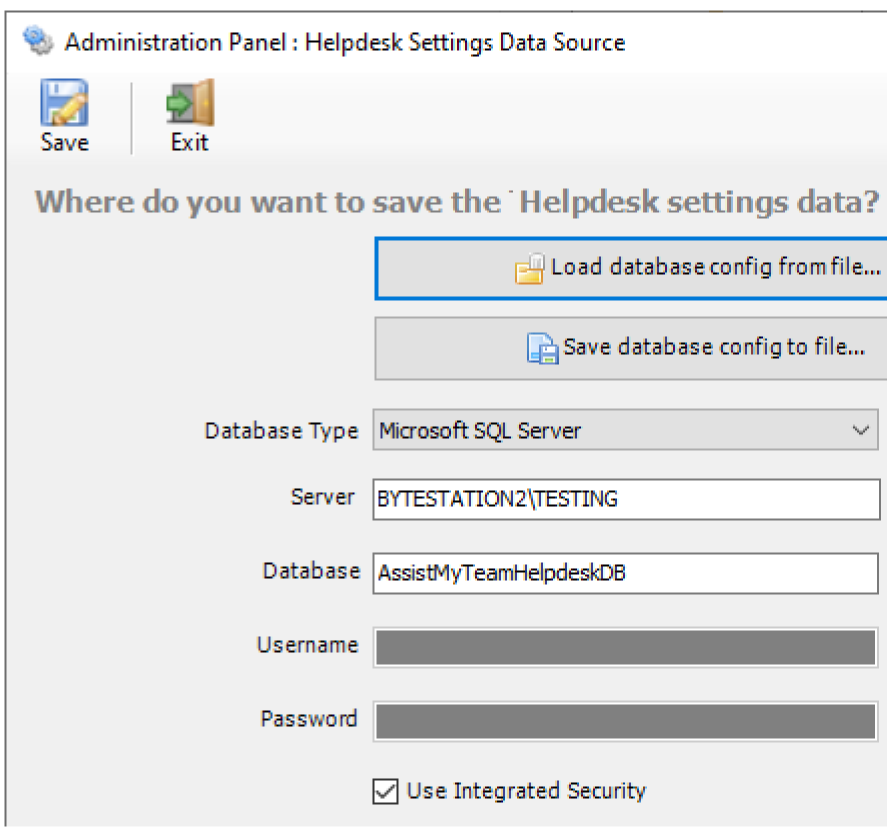
AssistMyTeam Helpdesk Add-in

Step 1

Manager creates a central helpdesk database

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).



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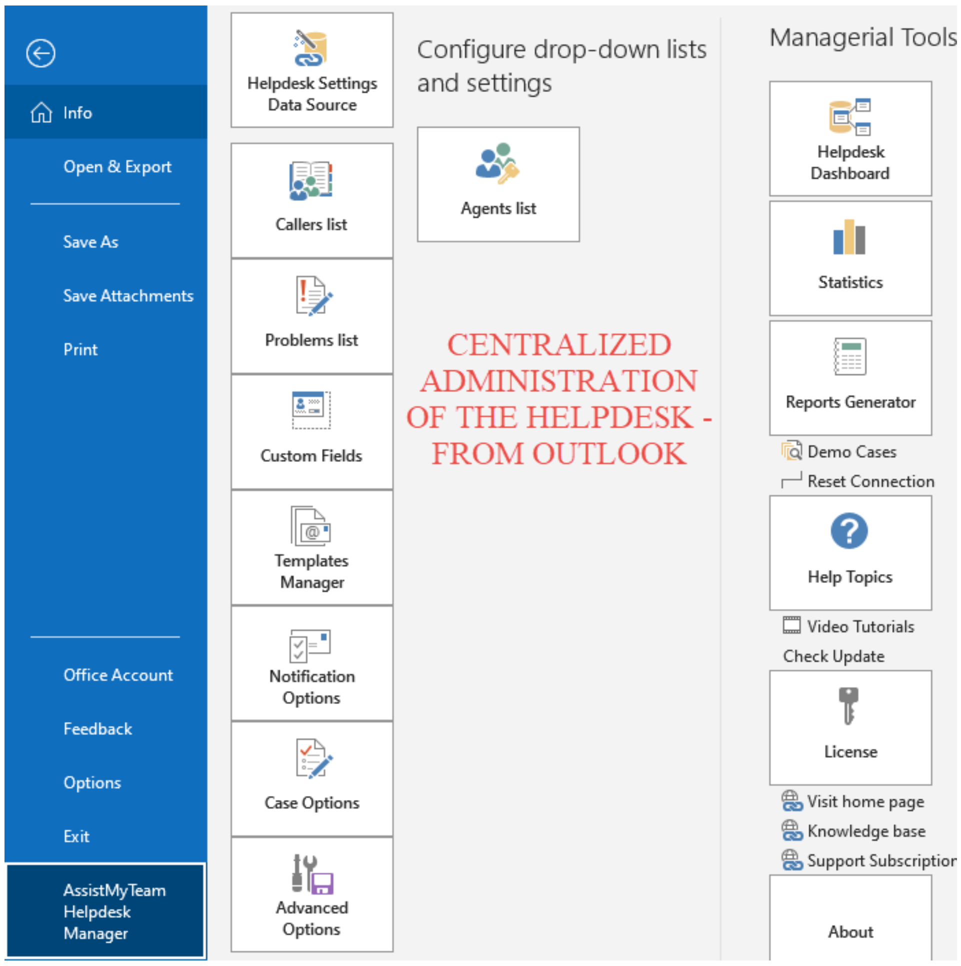
Step 2

Manager configures helpdesk settings and drop downs

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



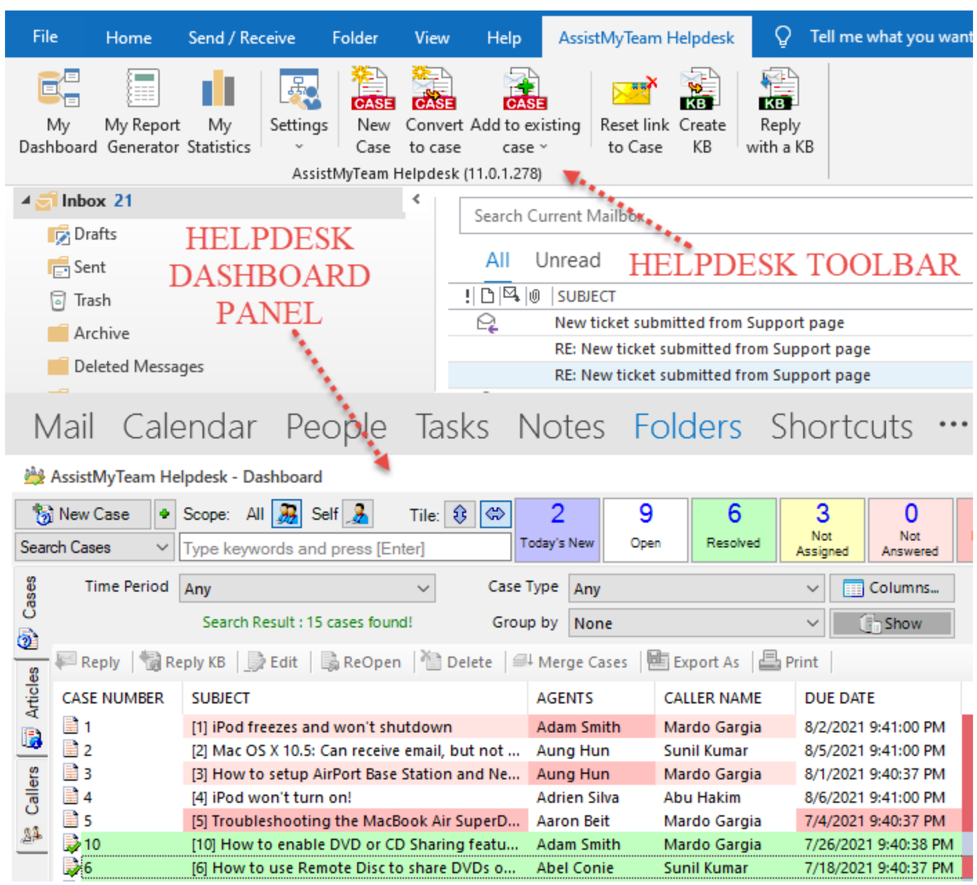
Step 3

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 technician of the helpdesk who would work on support cases needs to install the AssistMyTeam 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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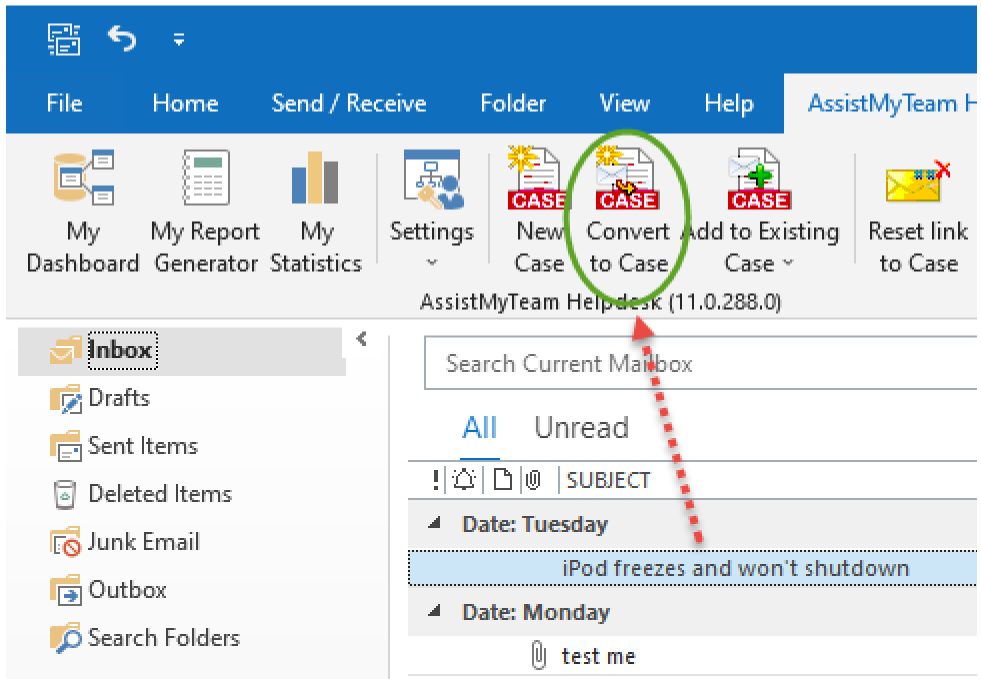
AssistMyTeam

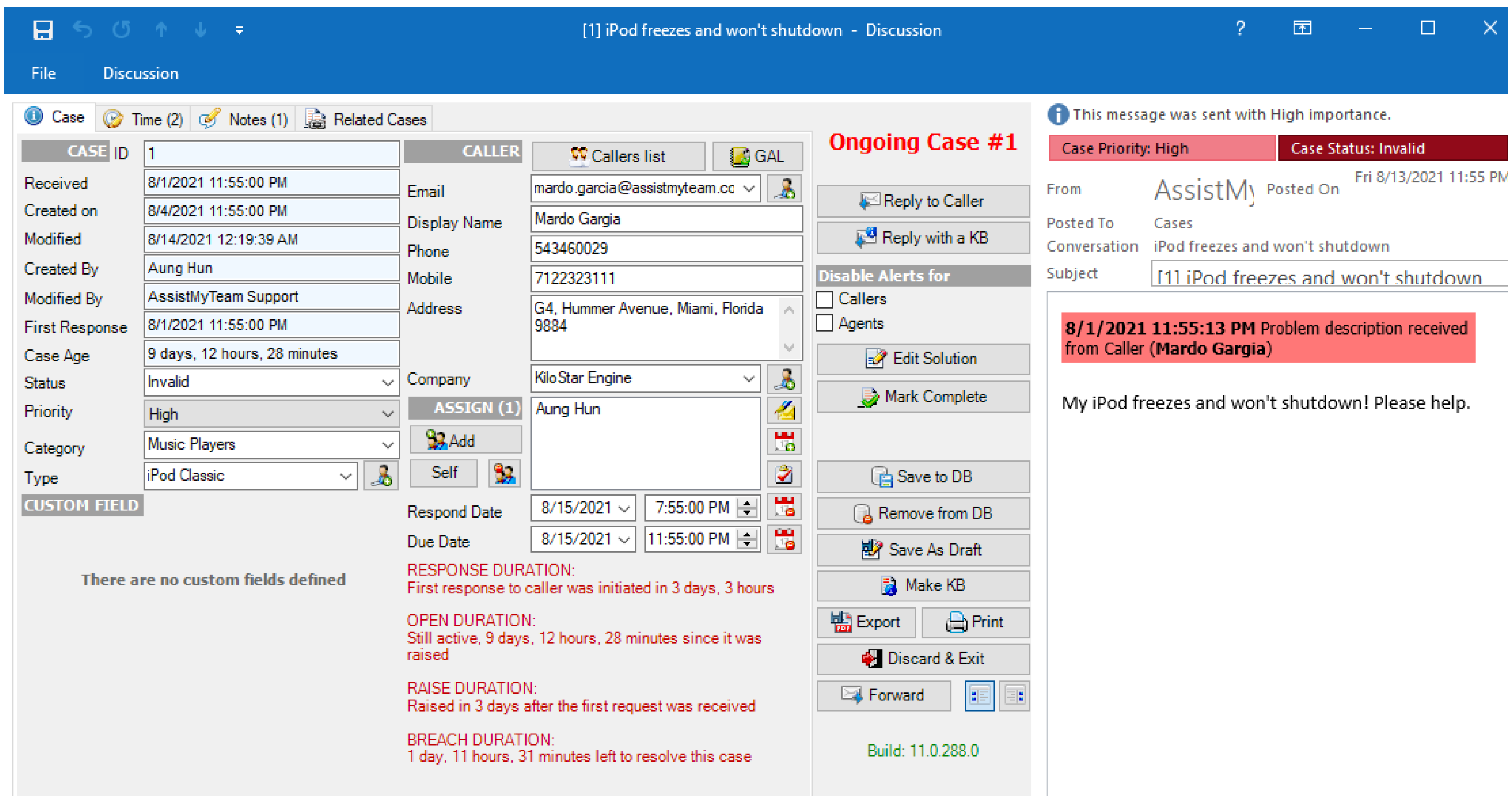
Step 4

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 technicians to the case

Typically, a manager or senior technician assigns the best technicians to the case for fulfillment of the service and speedy resolution.

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

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

Step 6

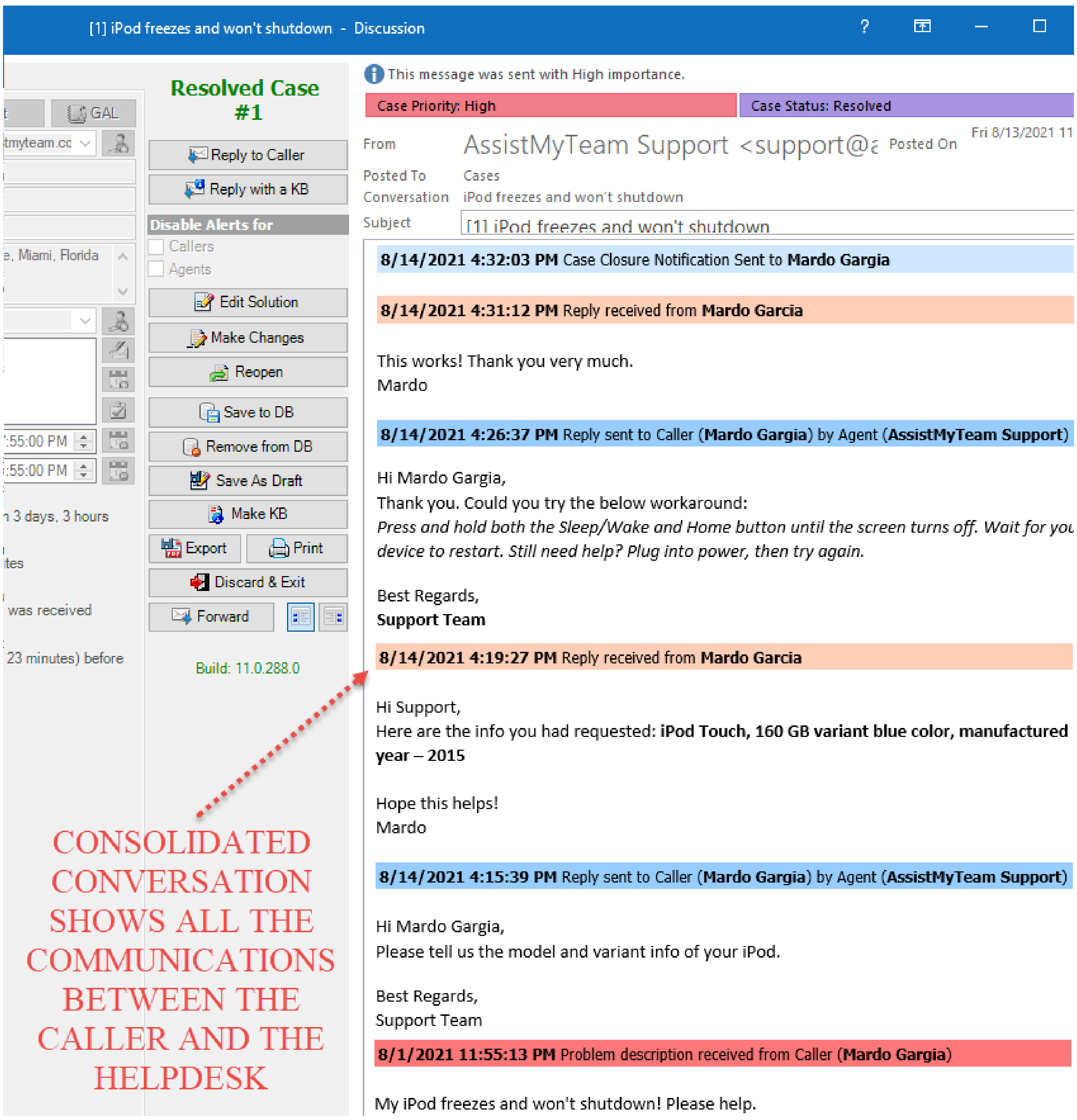
Technicians collaborate to resolve the case

The assigned technician then proceeds to fulfill and resolve the case in Outlook. Helpdesk manager may set due date and other deliverables on the particular case for the assigned technicians, 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 technician can fill time spent and assign additional technician 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 concerned technicians are notified automatically. If the case has been resolved, AssistMyTeam Helpdesk automatically re-opens and marks it as an ongoing case.



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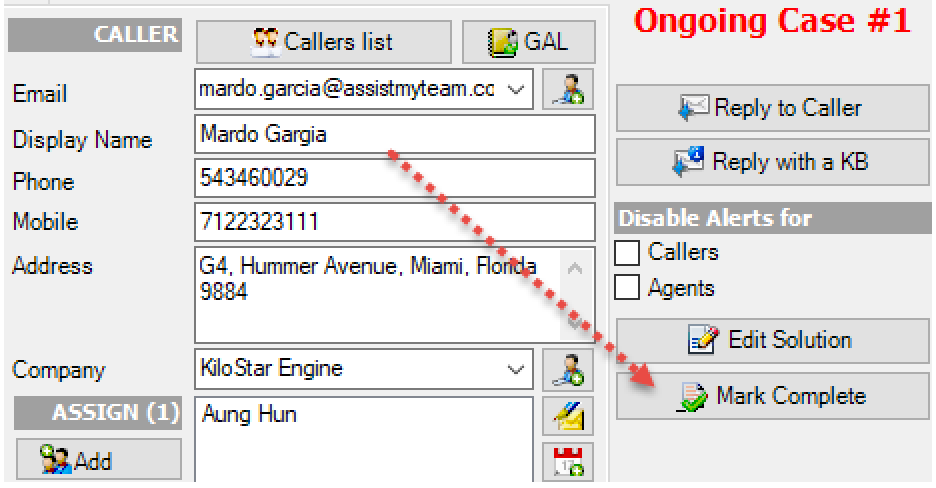
Step 8

Technician closes case after providing a resolution

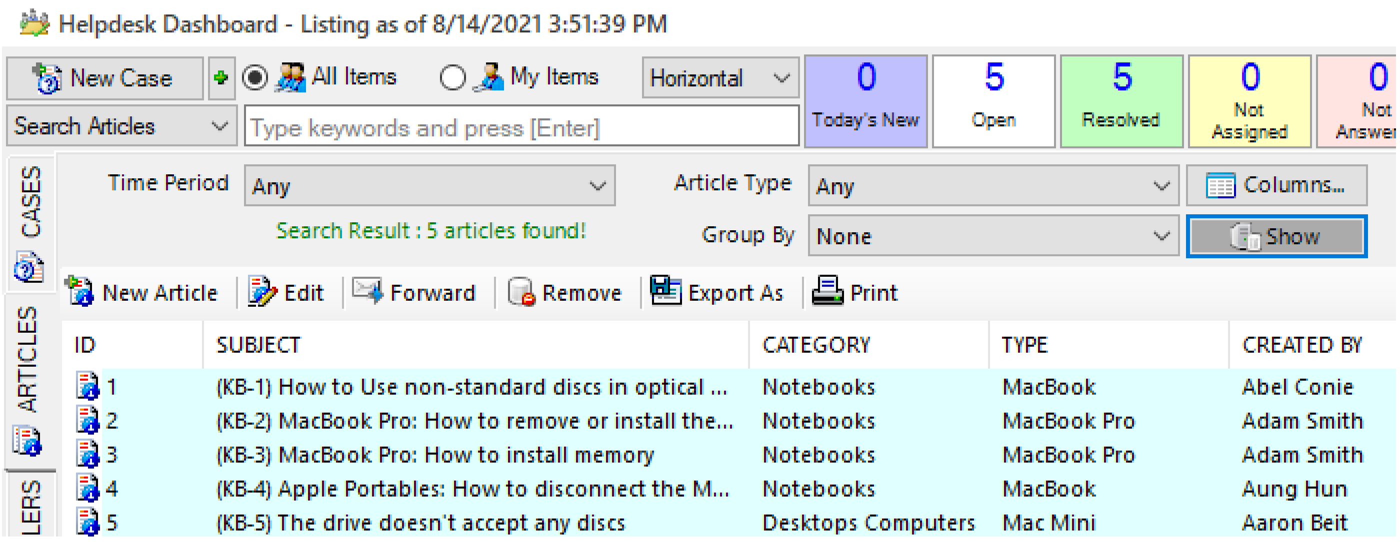
Once every parameter of the caller's request has been fulfilled, a case be closed. At the same time, the caller gets notified automatically on the closure of the case.



Step 9

Technician adds resolution to knowledge base

A closed case can be a good source of future reference and technician 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 technicians 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.

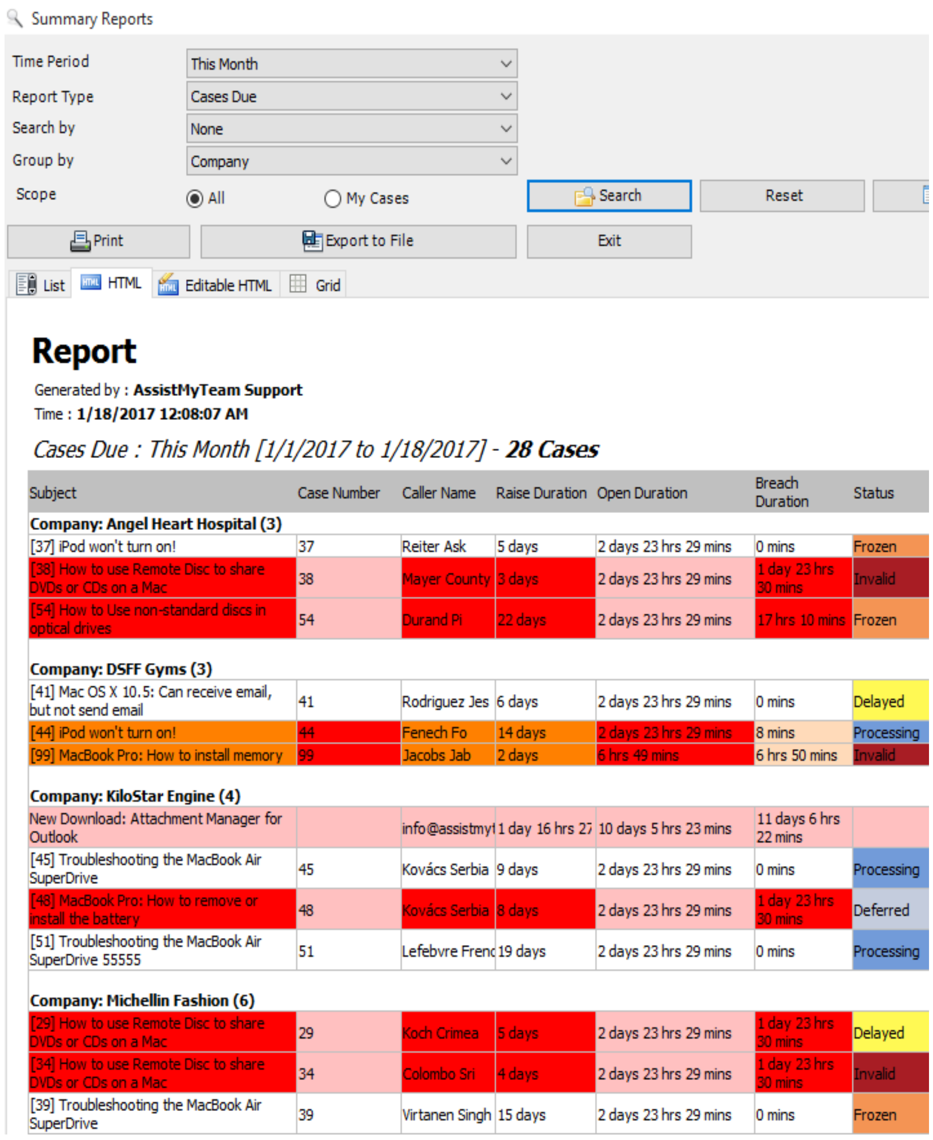


Step 10

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@assistmy[illegible]	1 day 16 hrs 2[illegible]	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

2. 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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3. Installation

AssistMyTeam Helpdesk System consists of two separate installs – **Managerial** and **Agent**. The managerial install is for **helpdesk administrators** who would configure or maintain the helpdesk settings, add or remove drop down lists, customize email templates etc.

Note: If administrators need to work on support cases, then the agent tool also needs to be installed, apart from the managerial portion

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 technicians, 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.*

Further, the Administrator setup is of two different variants - one each for 32-bit Outlook and 64-bit Outlook

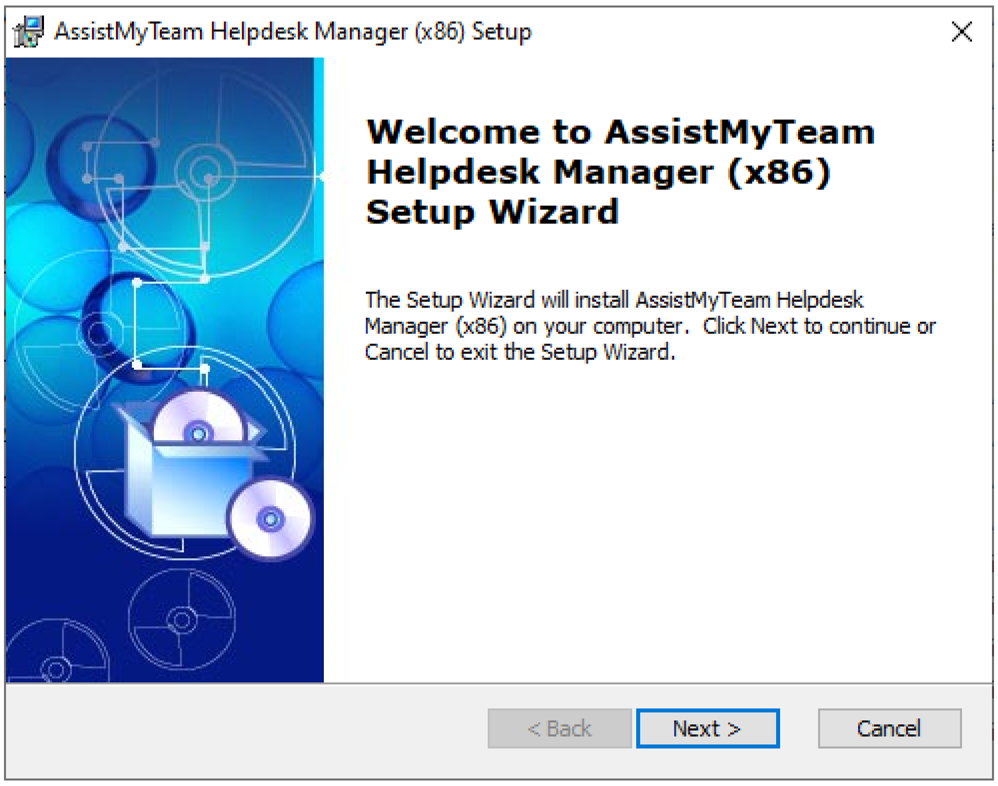
For Per User Installation:
AssistMyTeamHelpdeskManagerSetup_x86.exe (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
AssistMyTeamHelpdeskManagerSetup_x64.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

For Per Machine Installation:
AssistMyTeamHelpdeskManagerSetup_x86_Citrix.exe (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
AssistMyTeamHelpdeskManagerSetup_x64_Citrix.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

Managerial Installation

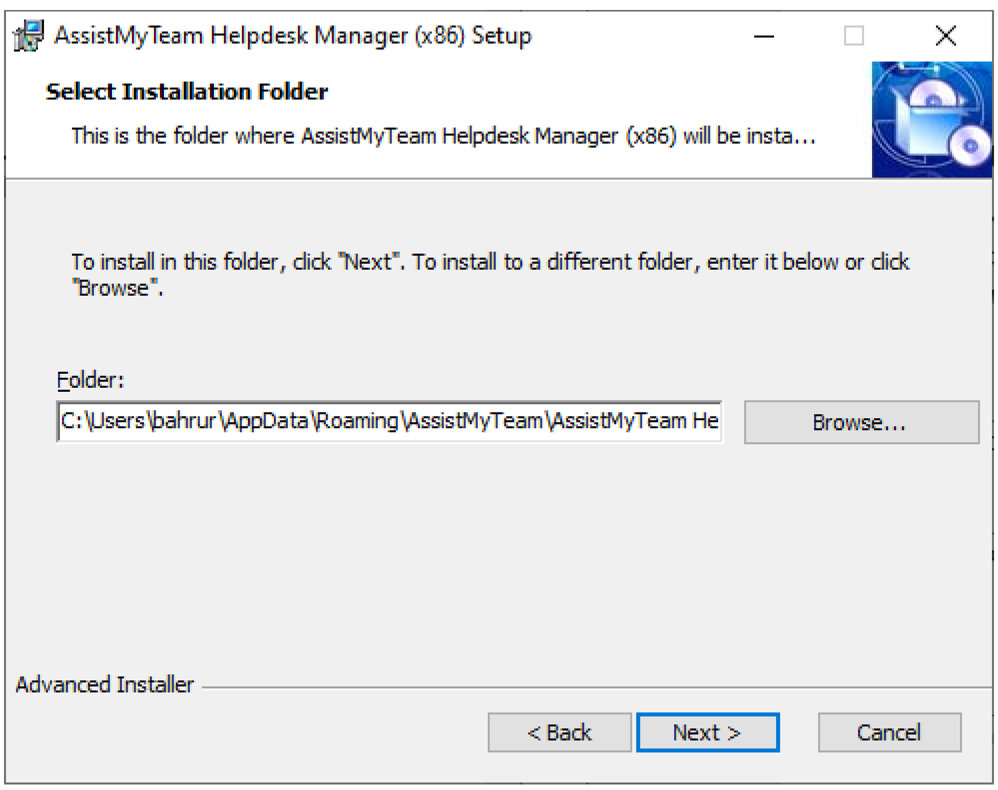
The managerial installation consists of an add-in that is exclusively designed for configuring and maintaining the settings of the helpdesk. It has to be performed by the helpdesk administrator/manager before the agent tool is installed on every technician's system.

Step 1. Run the **AssistMyTeamHelpdeskManagerSetup_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)



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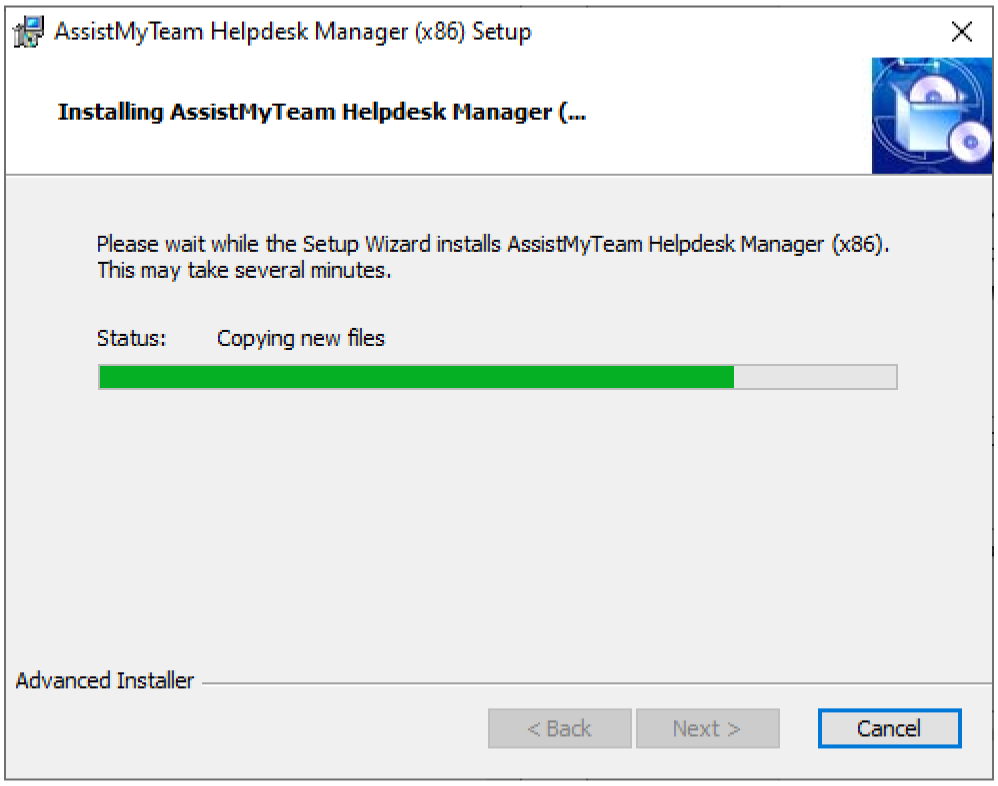
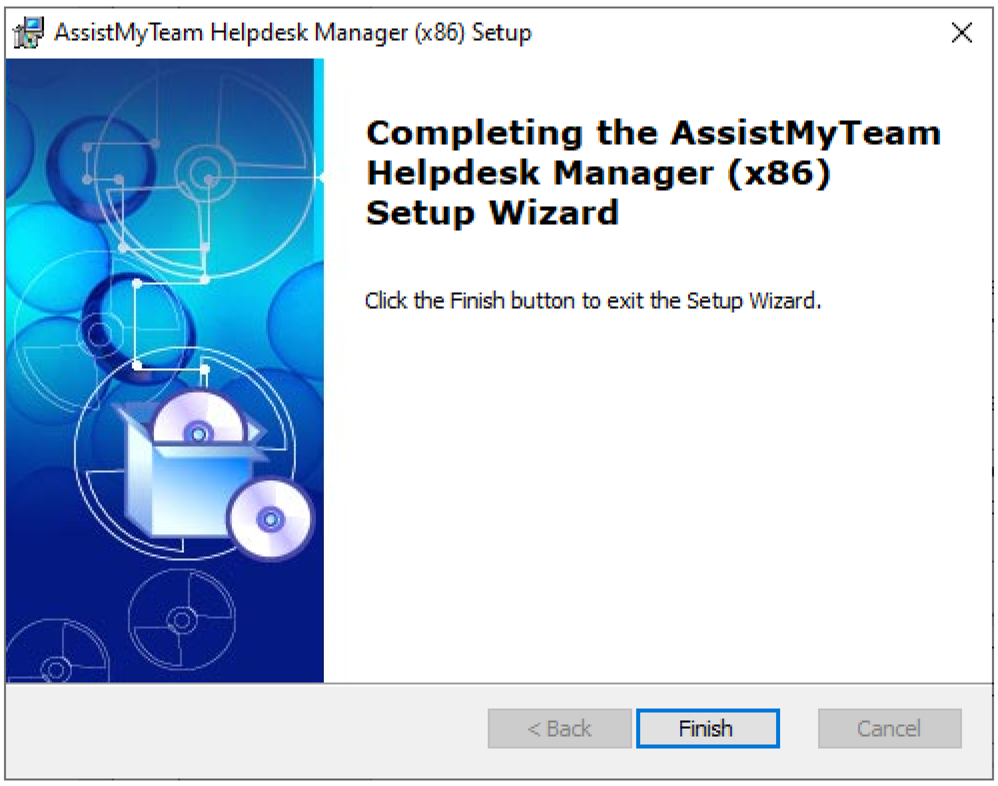
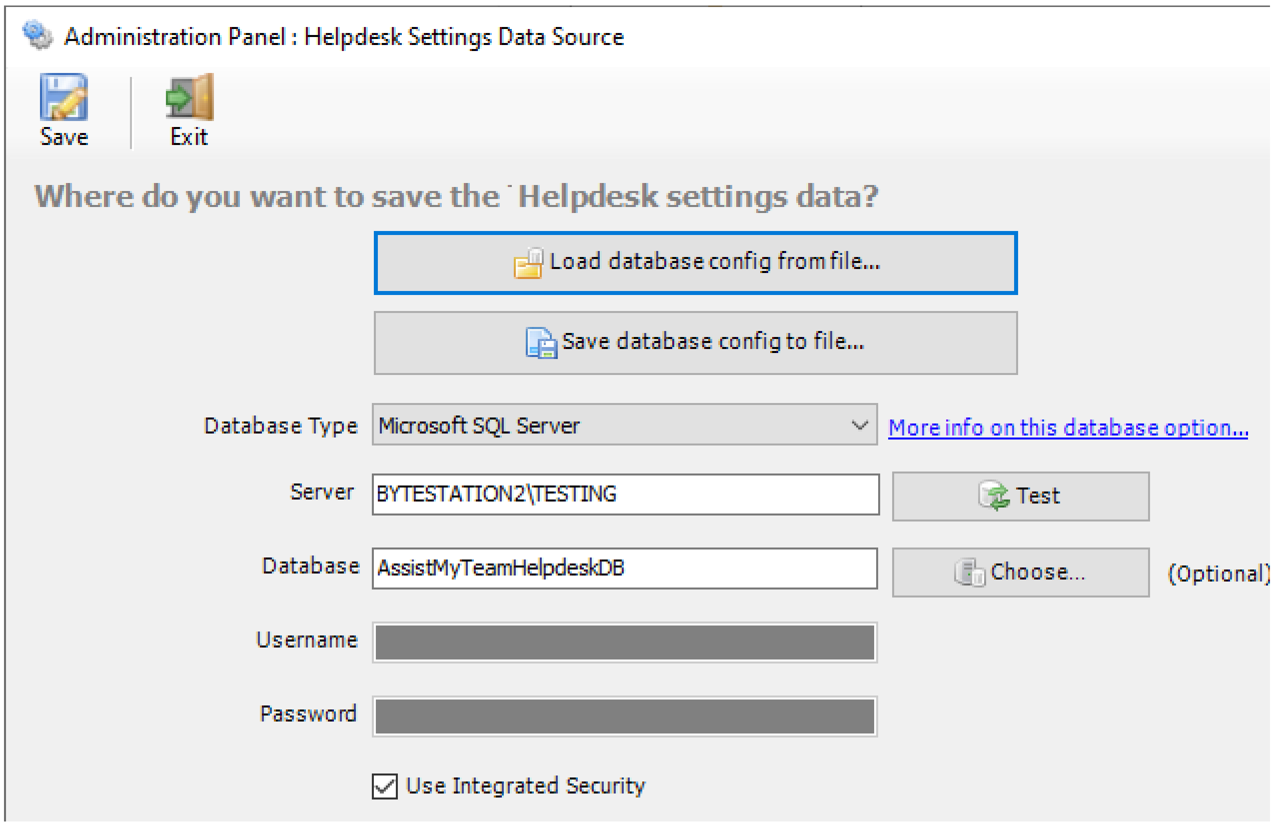
Step 3. Click **'Next'** to continue with the file's extraction. It just takes a few minutes to complete the whole copying process



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



Step 5. Start Outlook (restart if it was already running during the files installation). As soon as Outlook is loaded, you will be prompted with the following database connection dialog box:



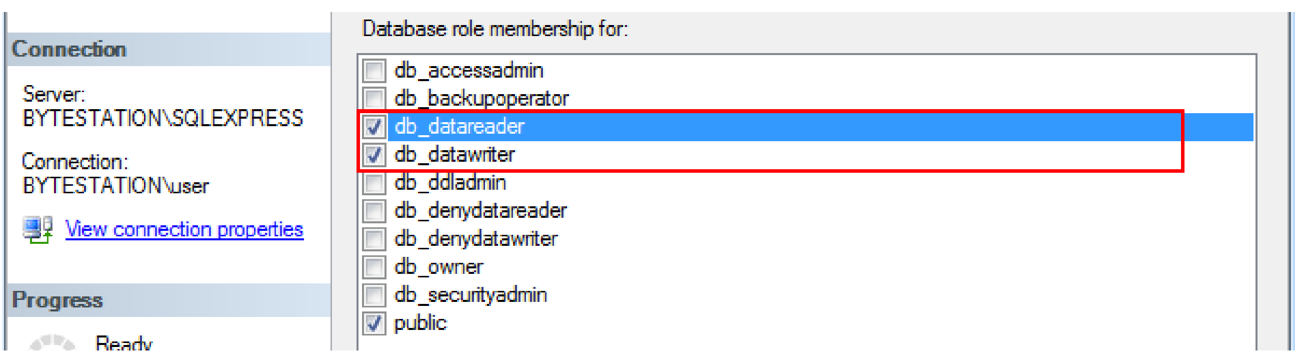
Now, the final step is to choose a database where all the settings, templates, cases, articles and other helpdesk data will be saved. Supported database options are: **Microsoft SQL Server** (default) and **Microsoft Azure SQL.**

Using Microsoft SQL Server

This is the default recommended database. SQL Server Express edition is also supported.

You need to provide the Server name as it is mandatory. The Database name is optional. If it is left empty, a new database with the name '**AssistMyTeamHelpdeskDB**' would be created. If your SQL server is configured to use windows authentication (NTLM), then you can check the 'Use Integrity Security' option to let Windows manager the credentials to access the resources on the SQL server.

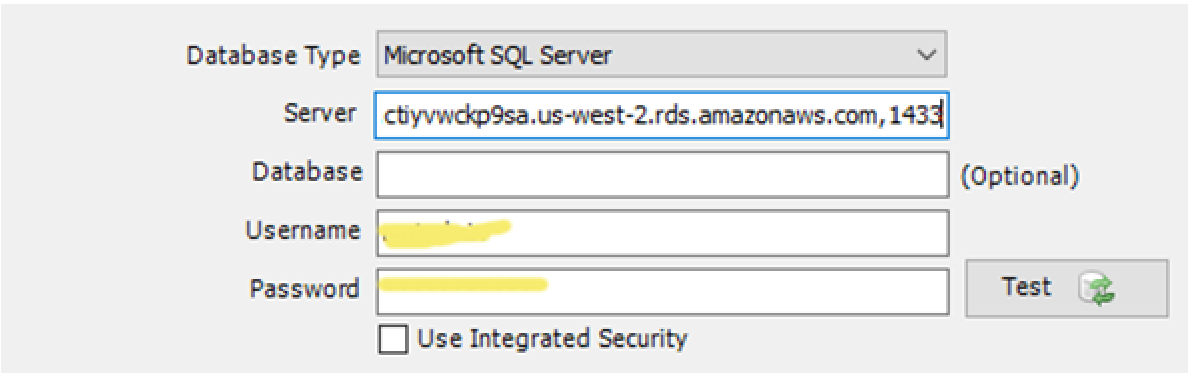
Permission for Technicians/Agents on the SQL database
Each of your helpdesk users/technicians should have both **db_datareader** and **db_datawriter** permission on the Helpdesk SQL database.



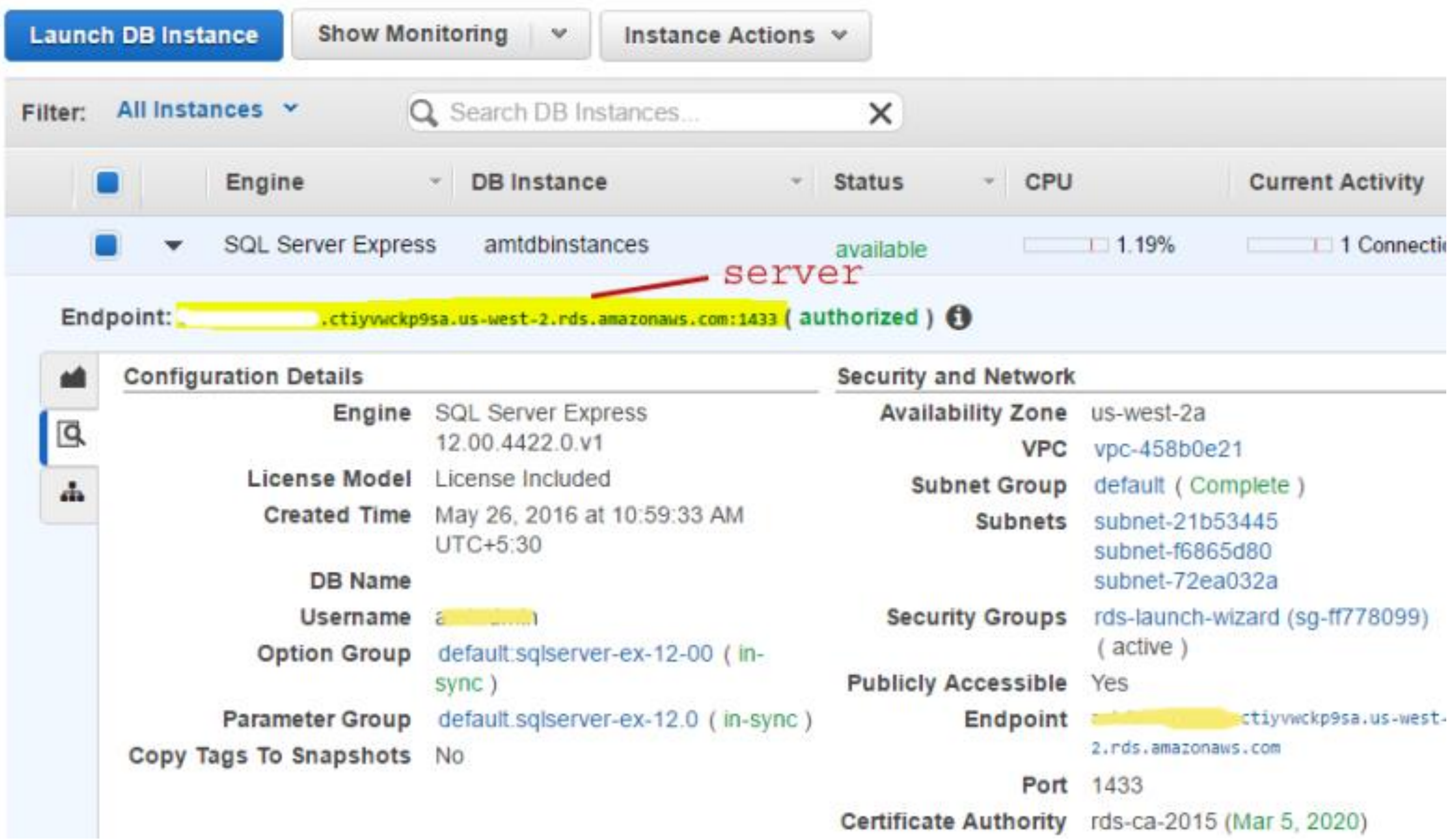
<u>**NOTE:**</u> When choosing a SQL server database for Helpdesk System, if you are not using the 'Integrated Security' (also known as Windows Authentication, or NTLM authentication), then it is very important that each user or agent has knowledge about their SQL username and password so that they can enter them while making the first-time connection with the helpdesk database with their installed helpdesk add-in in Outlook.

Using Cloud based SQL Server database

You can also use cloud-based SQL server service instead of on-premise such as Amazon RDS cloud service (They offer both free and paid accounts. For more, refer to https://aws.amazon.com/rds/). For instance, below is our test MS SQL account with Amazon RDS. Once you have signed up and created a MS SQL database, input the endpoint URL as server in our app. Make sure, you suffix the port number after the endpoint as **",1433"** so that the full URL in the Server name would be '**XXXXXXXXXXXXXXXXXXXXXXXXX.rds.amazon.com,1433**'.

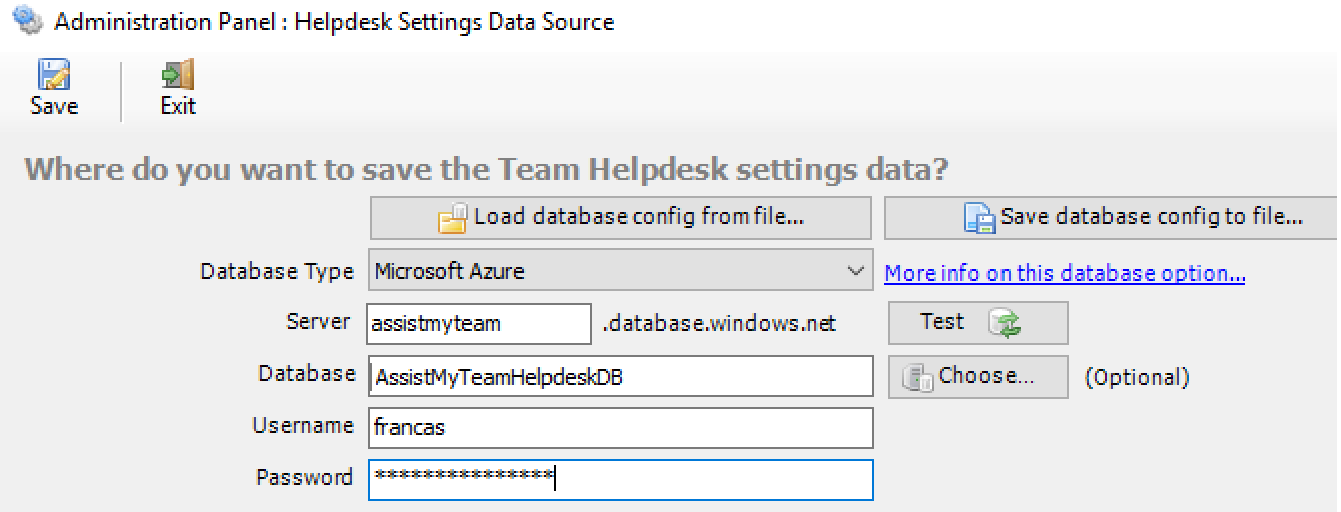


And here is screenshot of the RDS server to use from the RDS member panel.



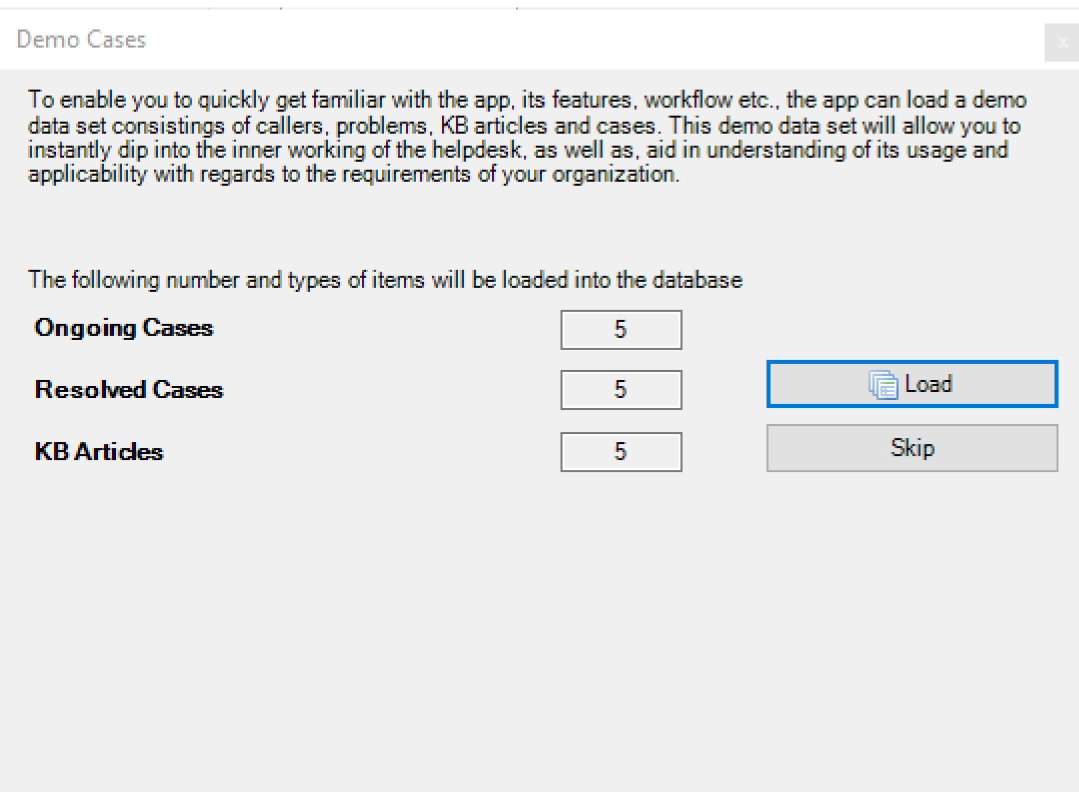
Using Microsoft Azure SQL

Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for helpdesk that have technicians scattered or working remotely in different locations but have access to the web.



NOTE: If no database name is mentioned, the helpdesk add-in will create a new database in your Azure SQL server, by the name of '**AssistMyTeamHelpdeskDB**'.

Step 6. With the database creation and configuration done, you will be given a choice to load a sample dataset of cases, KB articles and drop-down lists (problems, statuses, callers, agents etc.). We strongly feel you will be able to learn and get familiar with the helpdesk add-in very quickly with the sample dataset and hence, we recommend that you load them. If chosen, 5 each of cases, KB articles, callers, drop-down lists etc. will be loaded into your new database. You can, of course, remove them later without much difficulty.



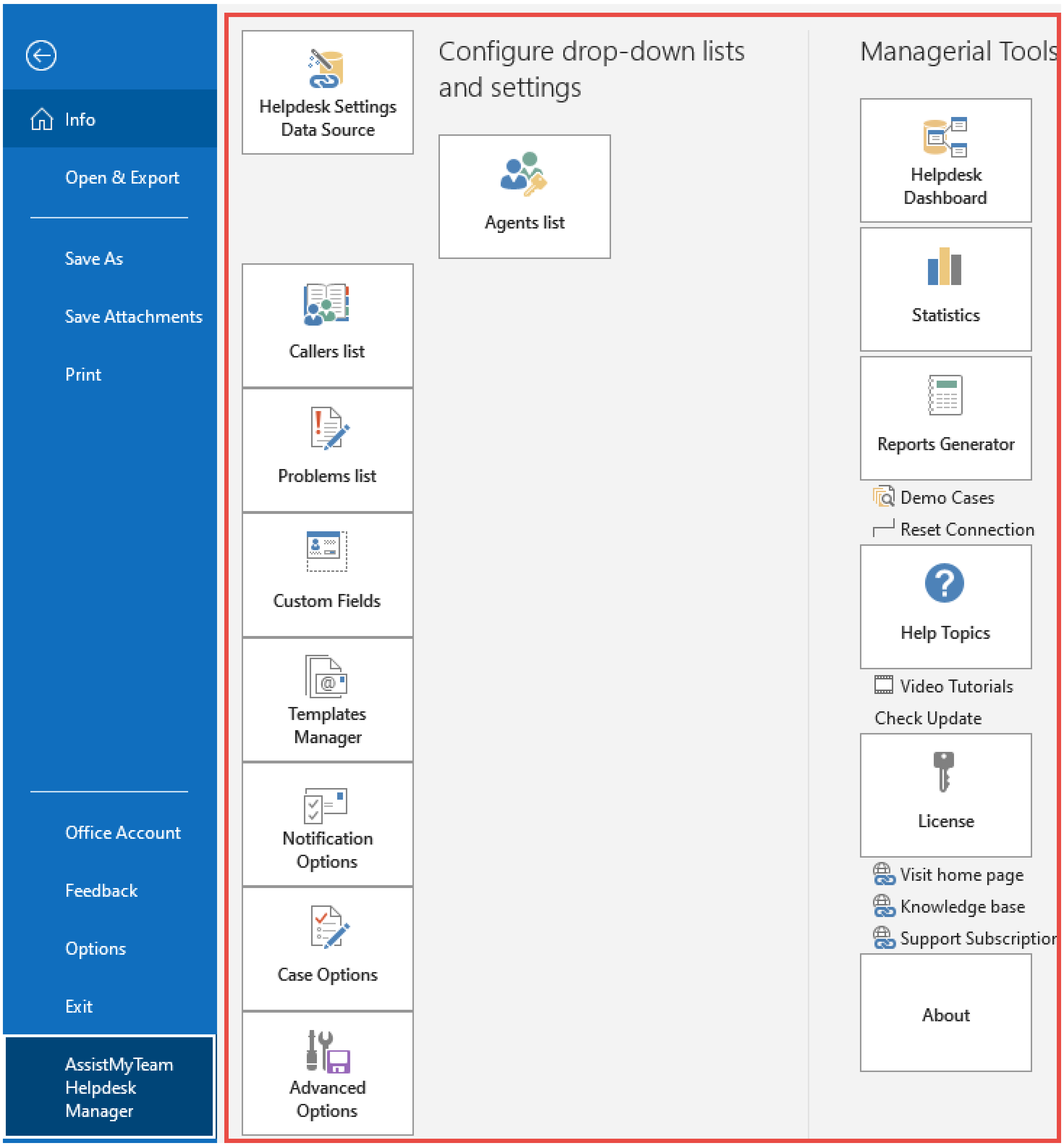
Once done, you are almost ready. If you want to work on the cases in your Outlook, you and other agents will also need to install the helpdesk agent add-in as well.

4. Managerial Settings

The Helpdesk Manager include list managers to customize the contents of all drop-down boxes on the help desk form, email templates for outgoing emails, notification options, custom fields etc. Besides managing the settings and drop-down lists, it is responsible for monitoring service compliance on active cases and automatic escalation to assigned technicians.

AssistMyTeam Helpdesk Manager Menu

The AssistMyTeam Helpdesk menu serves as the gateway for launching most of the functionalities and tools available in AssistMyTeam Helpdesk for Outlook. In Outlook 2019, you would find the AssistMyTeam Helpdesk Manager menu in the backstage file button, as shown below.



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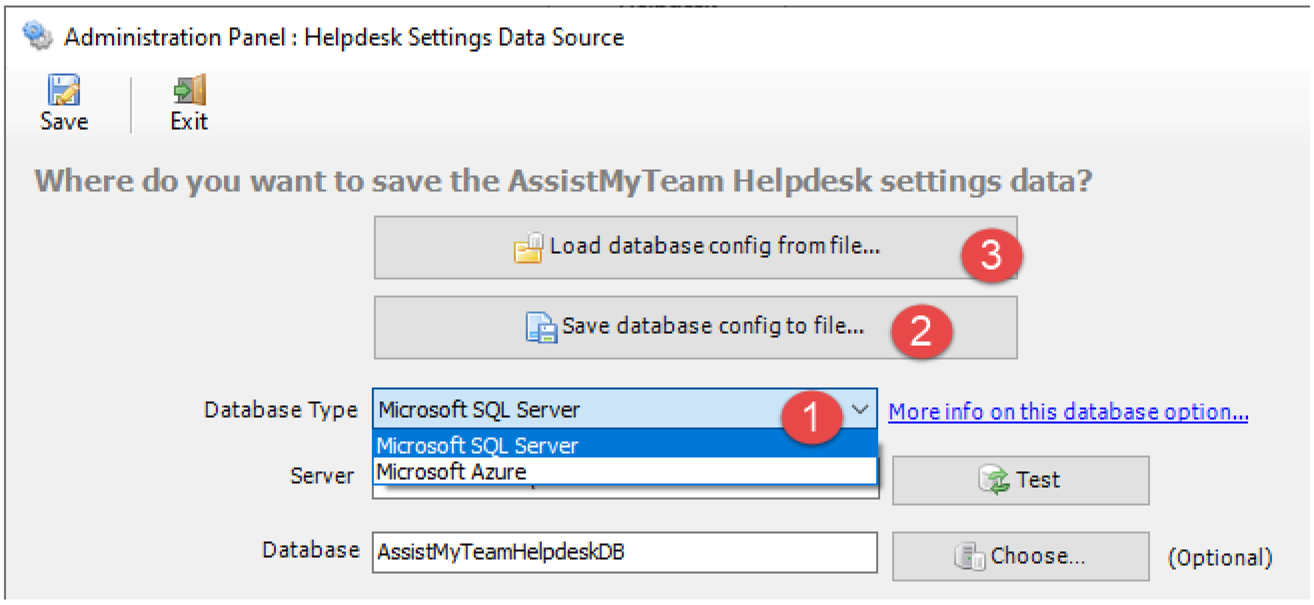
4.1 Helpdesk Settings Data Source

Being a groupware solution, AssistMyTeam Helpdesk add-in requires that it stores the data – cases, articles, callers, templates and other global configurations on a dedicated database, accessible to all technicians of your helpdesk. So, when you install the managerial tool first time, you will be prompted to choose a SQL database.

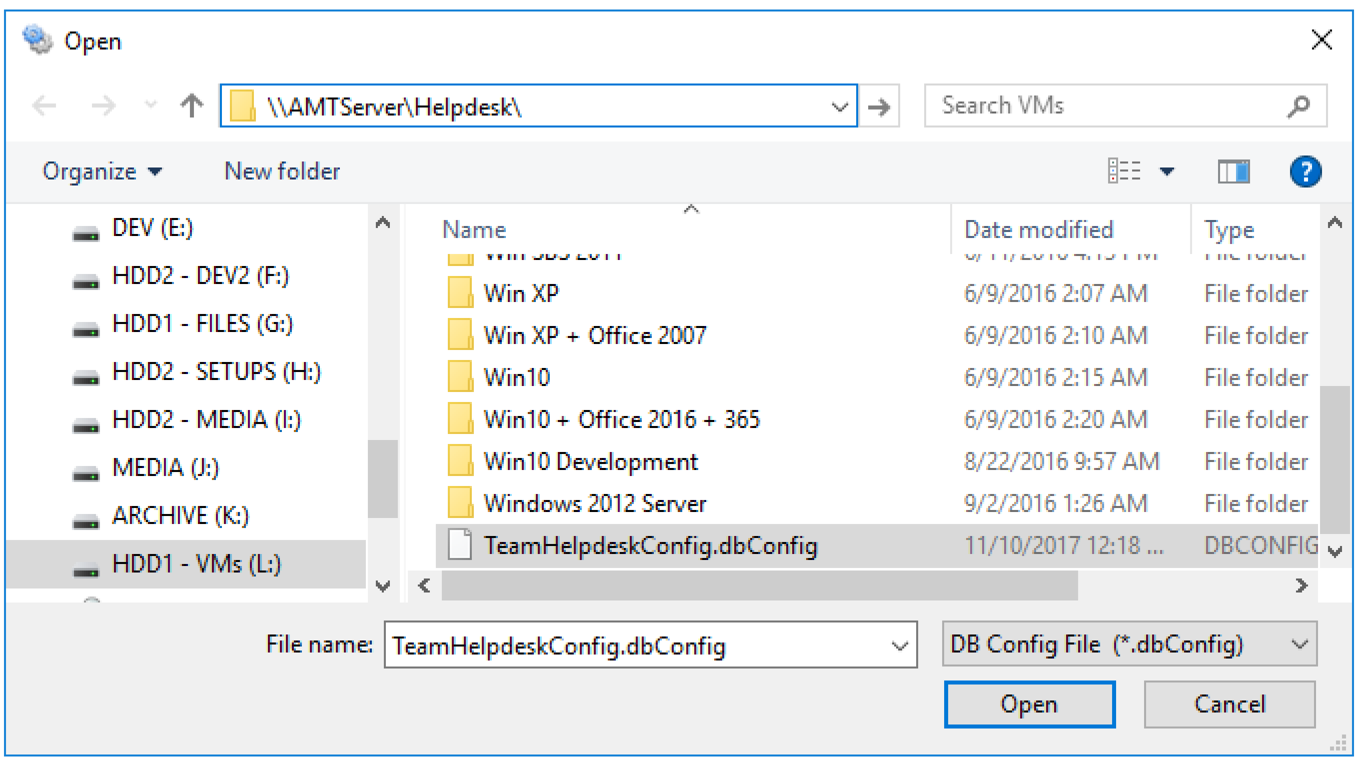


Supported database options:

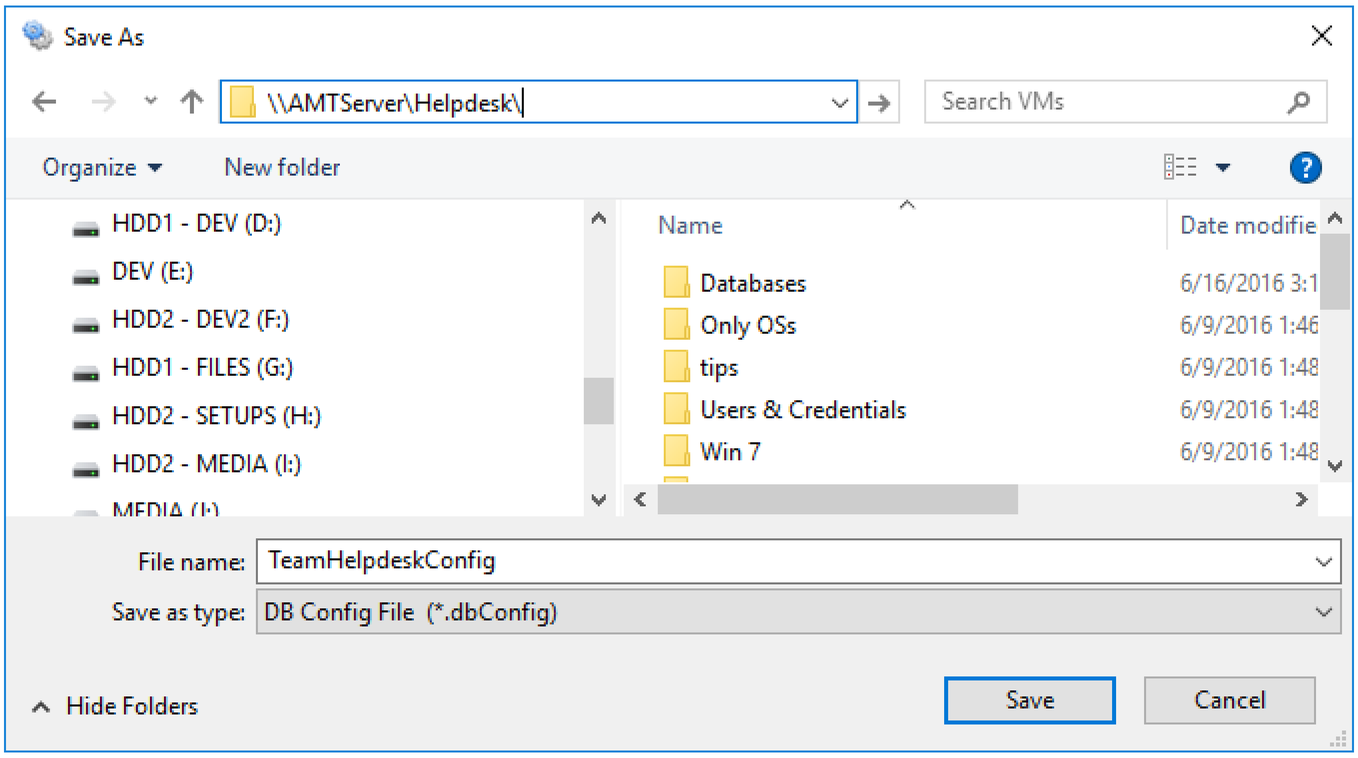
1 i) **Microsoft SQL Server**
It is recommended to use a dedicated inhouse SQL Server database option, as it gives a better performance and is easily scalable. For more information on using SQL Server with AssistMyTeam Helpdesk, refer to section '[Installation > SQL Server database]'.

ii) **Microsoft Azure SQL**
Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for helpdesk that have technicians scattered or working remotely in different locations and have no but have access to the web. For more information on using Azure SQL with AssistMyTeam Helpdesk, refer to section '[Installation > Azure SQL database]'.

2 Importing Database Configuration from file - Database configuration file (*.dbconfig) can be imported on new machine or new agent from '**Helpdesk Settings Data Source**' panel. And the manager/agent addin on that system will read the location and connect to the configured database automatically

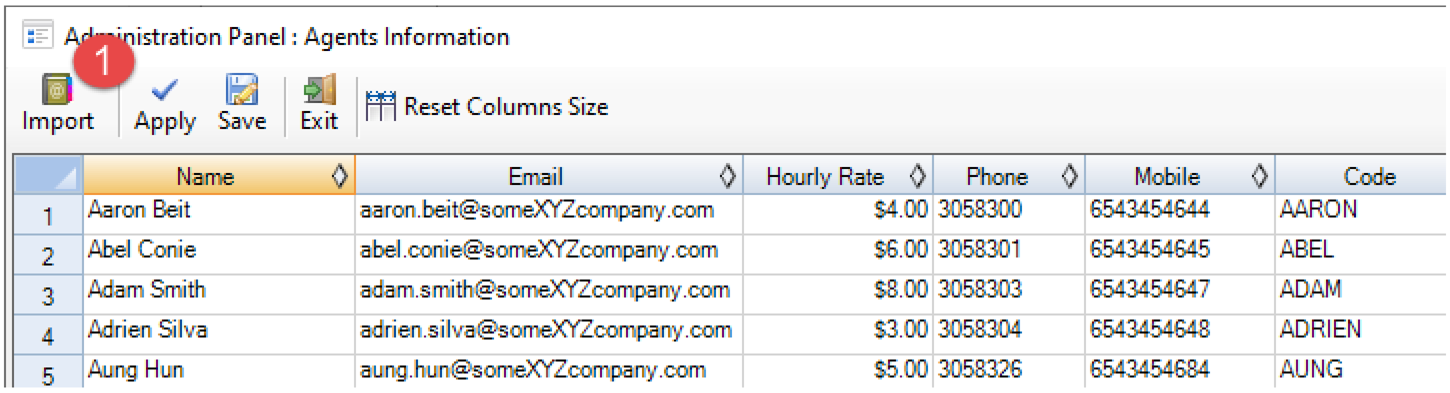


3 Saving database configuration to file: Database configuration can be saved to a file (having *.dbconfig file extension) from Helpdesk Settings Data Source panel and manager can share/deploy this .dbconfig file to other agents/users (say, via email or file server) so that individual technician can import that .dbconfig file to connect their manager/agent addin to the correct Helpdesk database in their respective Outlook.



4.2 Agents List

AssistMyTeam Helpdesk needs to be fed with the detail of the agents that would be working on support cases. In this list, the agent's name and email address are mandatory fields and should be unique for each agent that you entered.

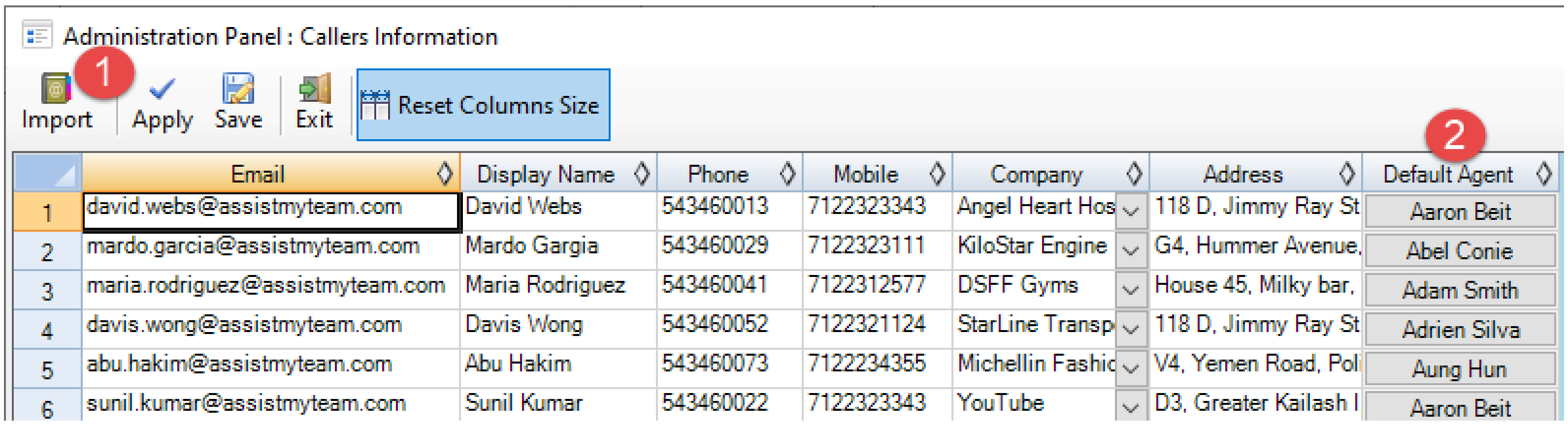


	Name	Email	Hourly Rate	Phone	Mobile	Code
1	Aaron Beit	aaron.beit@someXYZcompany.com	$4.00	3058300	6543454644	AARON
2	Abel Conie	abel.conie@someXYZcompany.com	$6.00	3058301	6543454645	ABEL
3	Adam Smith	adam.smith@someXYZcompany.com	$8.00	3058303	6543454647	ADAM
4	Adrien Silva	adrien.silva@someXYZcompany.com	$3.00	3058304	6543454648	ADRIEN
5	Aung Hun	aung.hun@someXYZcompany.com	$5.00	3058326	6543454684	AUNG

1 **Import agents from Global Address List/Active Directory** - Most likely, you might already have contact details of the agents in the exchange global address list. Use the 'Import...' button to display the address book and select those contacts that you want to import. The Agent's name, email, telephone, mobile fields would be then automatically filled in the grid.

4.3 Callers list

AssistMyTeam Helpdesk maintains the detail of the callers that had requested for support in a list. The caller's email address is a mandatory field and should be unique for each caller that you entered.



	Email	Display Name	Phone	Mobile	Company	Address	Default Agent
1	david.webs@assistmyteam.com	David Webs	543460013	7122323343	Angel Heart Hos	118 D, Jimmy Ray St	Aaron Beit
2	mardo.garcia@assistmyteam.com	Mardo Gargia	543460029	7122323111	KiloStar Engine	G4, Hummer Avenue,	Abel Conie
3	maria.rodriguez@assistmyteam.com	Maria Rodriguez	543460041	7122312577	DSFF Gyms	House 45, Milky bar,	Adam Smith
4	davis.wong@assistmyteam.com	Davis Wong	543460052	7122321124	StarLine Transp	118 D, Jimmy Ray St	Adrien Silva
5	abu.hakim@assistmyteam.com	Abu Hakim	543460073	7122234355	Michellin Fashic	V4, Yemen Road, Pol	Aung Hun
6	sunil.kumar@assistmyteam.com	Sunil Kumar	543460022	7122323343	YouTube	D3, Greater Kailash I	Aaron Beit

1 **Import callers from Global Address List/Active Directory** - Most likely, you might already have contact details of the callers in the exchange global address list. Use the **'Import...'** button to display the address book and select those contacts that you want to import. The contact's name, email, company, address, telephone, mobile fields would be then automatically filled in the grid.

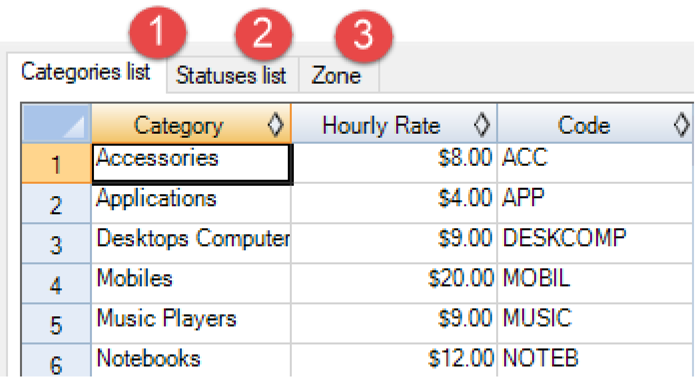
2 **Default Agent** - Each caller entry can also take a default agent. This is useful if you want to dynamically assign this agent to a case generated from an email send by a particular caller. This setup triggers the automatic notifications to the assigned agent.

4.4 Categories, Types and Statuses Management

Problem management is critical to ticketing system. After detecting a problem, helpdesk manager should log and categorize the problem into a main category and secondary type. This step is beneficial in several ways.

- Allows the helpdesk to sort and model incidents that occur regularly.
- Allows for automatic assignment of prioritization such as agents).
- Ability to gather and report on helpdesk tickets data. This data allows the organization to not only track problem trends, but also to assess its effect on service demand and helpdesk capacity.

With AssistMyTeam Helpdesk, you can maintain a list of problems (as categories, types, statuses) that is representative of all possible incidents reported by your end users.



	Category	Hourly Rate	Code
1	Accessories	$8.00	ACC
2	Applications	$4.00	APP
3	Desktops Computer	$9.00	DESKCOMP
4	Mobiles	$20.00	MOBIL
5	Music Players	$9.00	MUSIC
6	Notebooks	$12.00	NOTEB

1 Problem categories list

Gather all the problem areas that your support team will be attending to and feed them into the 'Category' field. You can also specify the default hourly rate for each problem category, so that, when using statistics, you can consider this category rate.

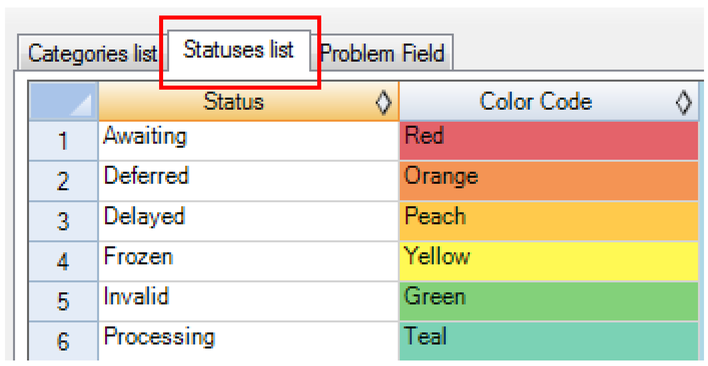
2 Problem statuses list

As agents start working on assigned cases, over time, they may need to update the state of the tagged problem so that managers can track and plan additional resources if needed to resolve that particular case. Such a list of status flags can be specified.

The color code column allows you to associate a color with a status. And case item in Outlook that is tagged with a problem status will be colorized with the associated color.

You can choose from one of the 20 colors supported by Outlook for color coding Outlook items (via Categories field of the Outlook item).

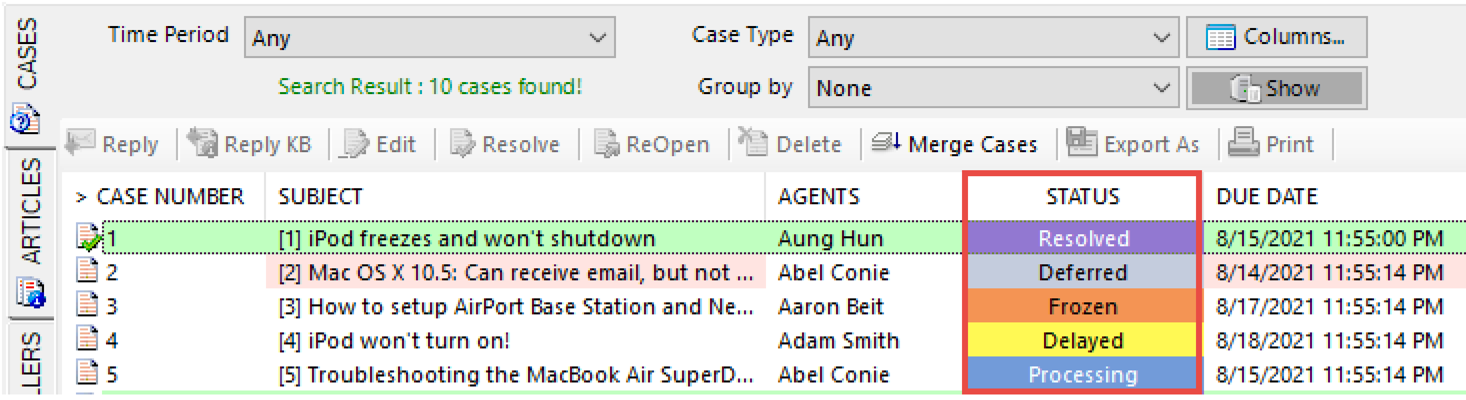
To specify a color code for a status, double-click the corresponding second cell (color code column).



	Status	Color Code
1	Awaiting	Red
2	Deferred	Orange
3	Delayed	Peach
4	Frozen	Yellow
5	Invalid	Green
6	Processing	Teal

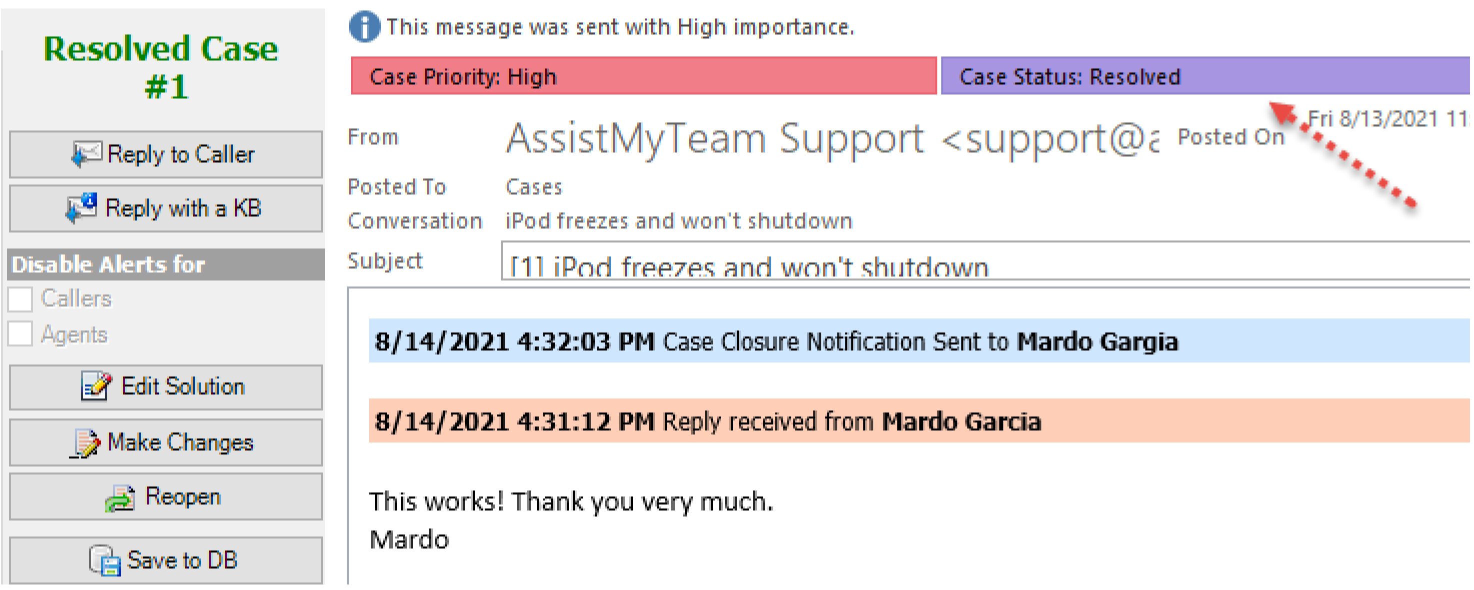
When you set the status of the case manually or when the add-in does that automatically (using the default status values), you will see that the status column on the dashboard panel are color-coded accordingly.

AssistMyTeam



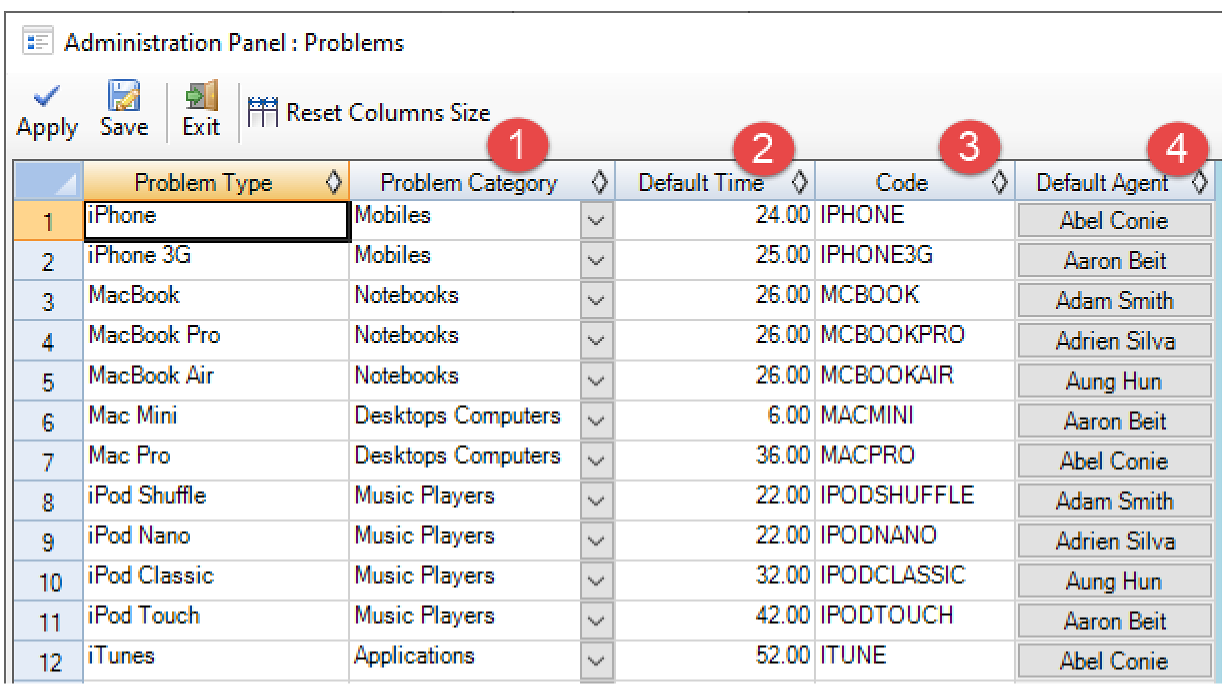
(NOTE: For color coding of cases with status color code, you need to enable the option *'Allow Color Coding of Case items based on the status of the case'* from *AssistMyTeam Helpdesk Manager > Advanced Options > General tab*)

And if you view the case, you will also see the color bar in the header.



Problem types list

The problem types are sub-category items that fall within the domain of a problem area/category. Hence, each problem category has a specific list of problem types that an agent or manager can choose from and tag a support request case.



	Problem Type	Problem Category	Default Time	Code	Default Agent
1	iPhone	Mobiles	24.00	IPHONE	Abel Conie
2	iPhone 3G	Mobiles	25.00	IPHONE3G	Aaron Beit
3	MacBook	Notebooks	26.00	MCBOOK	Adam Smith
4	MacBook Pro	Notebooks	26.00	MCBOOKPRO	Adrien Silva
5	MacBook Air	Notebooks	26.00	MCBOOKAIR	Aung Hun
6	Mac Mini	Desktops Computers	6.00	MACMINI	Aaron Beit
7	Mac Pro	Desktops Computers	36.00	MACPRO	Abel Conie
8	iPod Shuffle	Music Players	22.00	IPODSHUFFLE	Adam Smith
9	iPod Nano	Music Players	22.00	IPODNANO	Adrien Silva
10	iPod Classic	Music Players	32.00	IPODCLASSIC	Aung Hun
11	iPod Touch	Music Players	42.00	IPODTOUCH	Aaron Beit
12	iTunes	Applications	52.00	ITUNE	Abel Conie

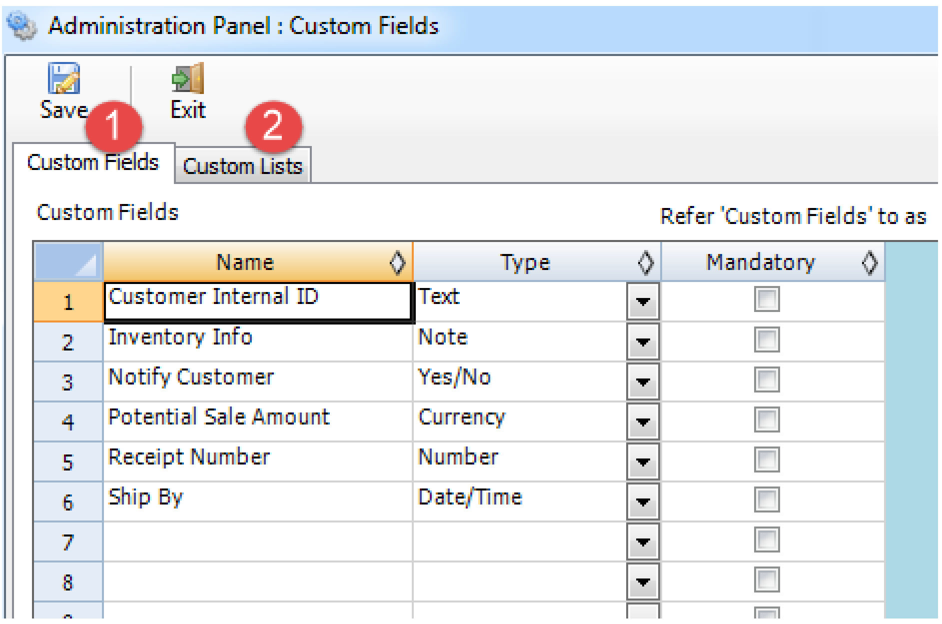
In the Outlook case and knowledge base form, when an agent selects from the problem category drop down, it will load this tier of problem type lists in the type drop-down box. These nested tiers of categories/types are complete customizable to your organization's support model and act as somewhat of a guiding decision tree for the caller (when submitting online service request) and agents etc. These also assist in providing high-level information to help desk managers in automatic assignment of cases to the correct agent.

1. **Problem Category** to which this problem type belongs to. If a particular problem type is applicable to all problem categories, leave it as empty. That is, if you have a common problem type for all Problem categories, you don't need to add the same problem type for each category. Just leave the Problem Category column empty for that problem type.
2. **Default time** (in minutes) under which the particular problem is expected to be fixed/resolved.
3. **Code** – This is an abbreviated code that you can define for each problem type. This could be one of the tracking codes that helpdesk manager can configure for embedding into the subject of the case item (along with the case ID) for easy recognition and tracking.
4. **Default Agent** who has expertise on that problem. You can also assign multiple agents to a problem type. And these default agents could be automatically assigned to cases that are tagged with this problem type.

4.5 Custom Fields

You can deploy any number of custom fields that take different data types and these fields will be available in the Custom fields tab of the case form in Outlook, such that, when you are raising a ticket from an email or phone call, you can fill in the value directly. All defined custom fields are available in summary reports and OLAP Statistics tool.

You can define such custom fields that take the following data types: *Text, Number, Currency, Yes/No, Date/Time, Note or drop-down List.*



1

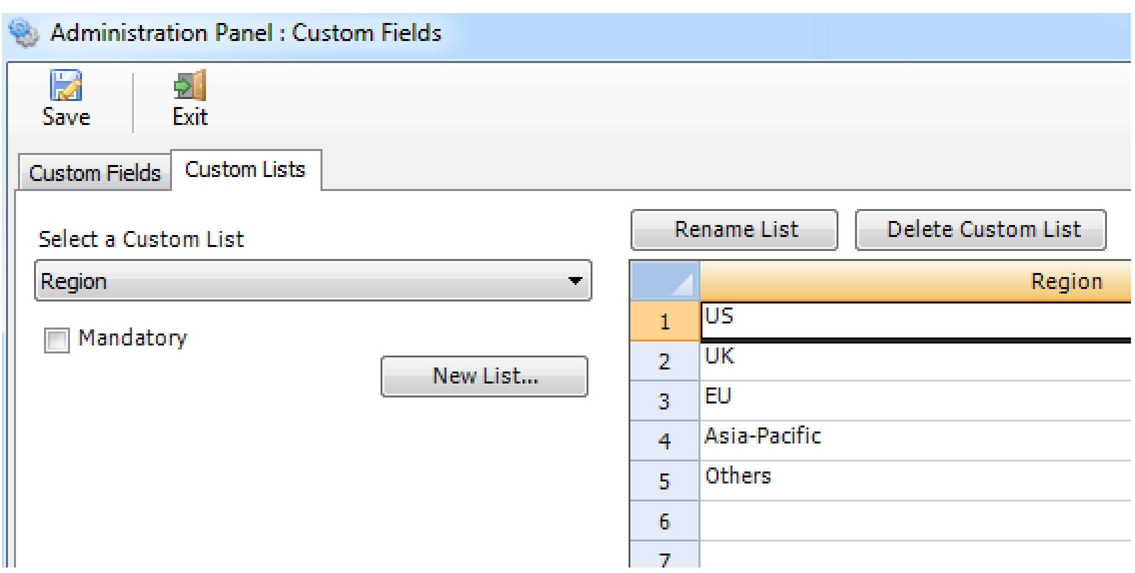
Custom fields can be of 6 different data types as displayed in the image above:
Currency, Date/Time, Numeric, Text, Yes/No, Note.

You can add any number of Custom fields as required and they will all appear in the case form in Outlook.

You also have the option to even mark a custom field **Mandatory**, so that without filling the mandatory fields, a case couldn't be mark completed. Once a field is marked mandatory it would be displayed in red color so that user can identify the mandatory fields.

2

Custom List - The titles of these custom list can be edited to get the proper meaningful label that signifies the information the field store. *For example, the first drop-down field can be titled as 'Client' and the administrator can fill up the names of all their clients for which projects are contracted for.*



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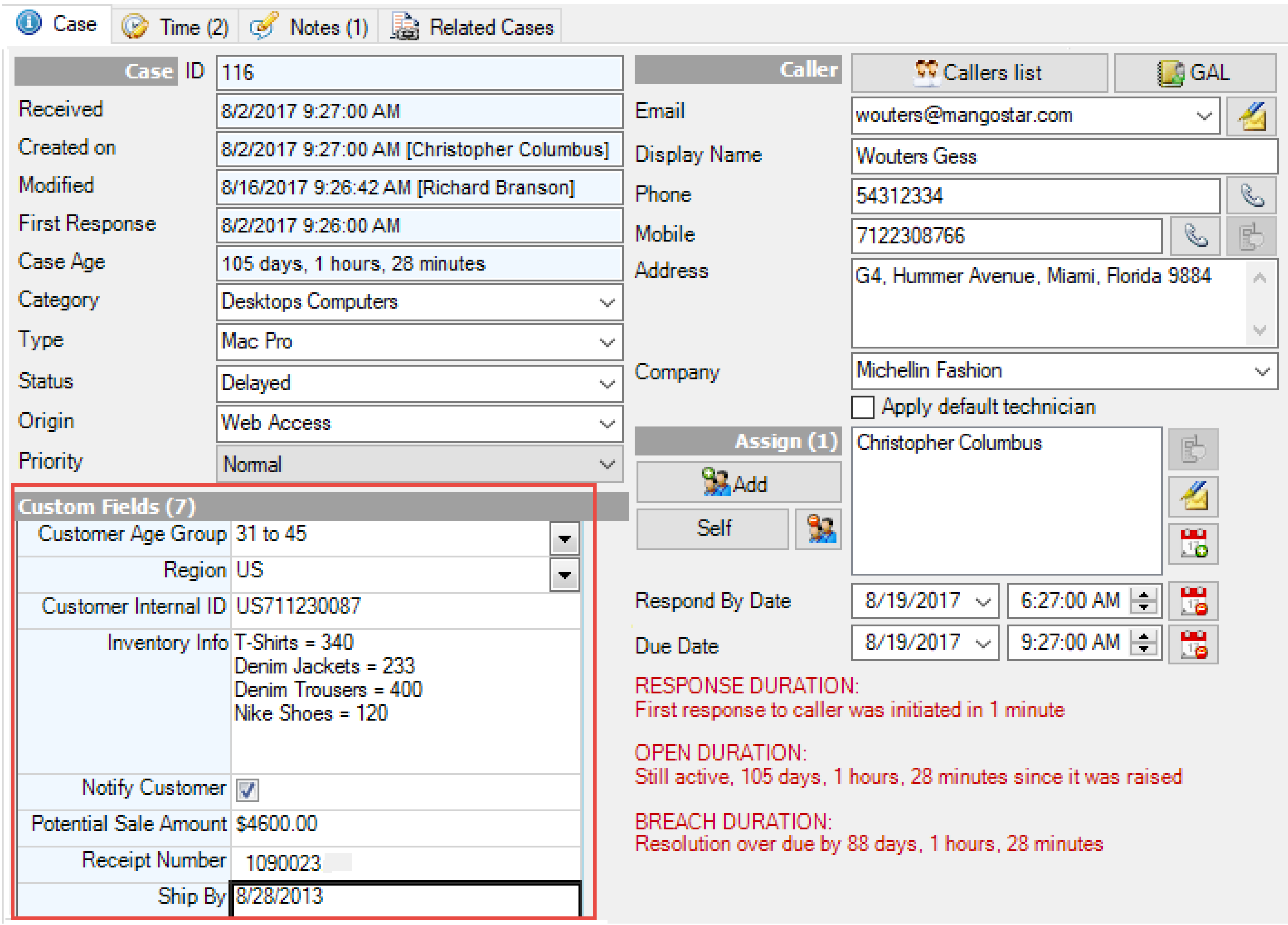
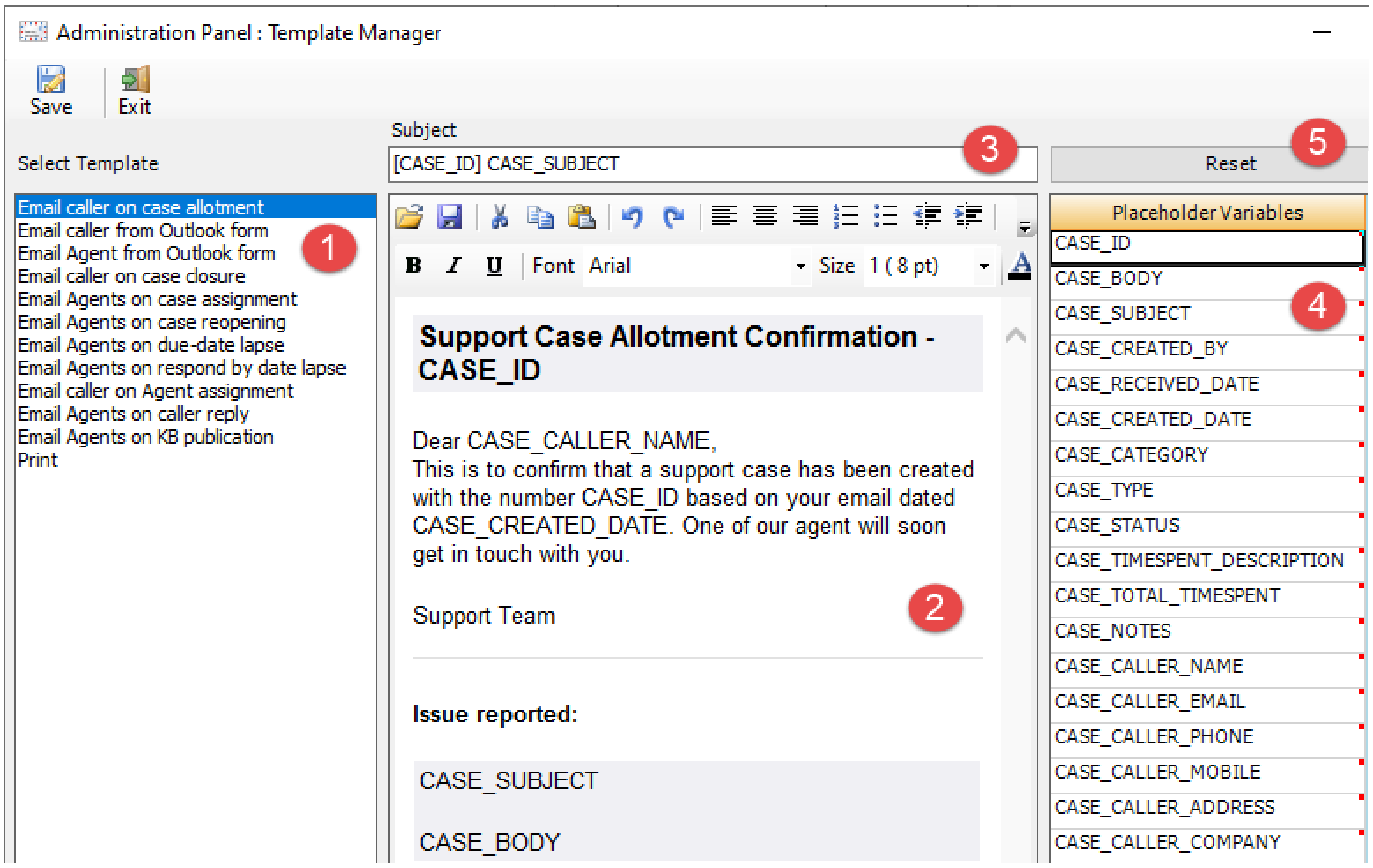


When you open a case in Outlook, the custom fields are available to collect further data on the caller or problem or related to the case in general.

4.6 Templates Manager

AssistMyTeam Helpdesk uses various templates for sending out notifications and reminders to callers and technicians - both manual and automatic. Each template takes the HTML format. There are a whole lot of notification options for different events such as when a case is created, changed or resolved, or when an agent is assigned to the case, or when the due date has lapsed etc. Automated emails are sent out directly when a relevant event occurs and the whole exercise is transparent to the agents.



1 A list of all templates used for print, email notifications. The followings are the available templates:

Template	Purpose
Print	HTML template used when printing the support case item in Outlook
Email caller from case form	HTML template used when contacting the caller of a case
Email technicians from case form	HTML template used when contacting the technician responsible for a case
Email caller on case closure	HTML template used in the automated email to the caller to notify about the successful resolution to the allotted case
Email technicians on case assignment	HTML template used in the automated email to the technicians to notify when a case is assigned
Email technicians on case reopening	HTML template used in the automated email to the concerned technicians when a resolved case has been re-opened
Email technicians on due-date lapse	HTML template used in the automated email to the concerned technicians when the due date of a case is about to be overdue
Email technicians on respond by date lapse	HTML template used in the automated email to the concerned technicians when the respond by date of a case is about to be overdue

Email caller on technician assignment	HTML template used in the automated email to the caller when new technicians are assigned or existing ones changed
Email technicians on caller reply	HTML template used in the automated email to concerned technicians to inform about new replies from the caller
Email Technicians on KB publication	HTML template used in the automated email to all helpdesk staffs to inform about new KB publication

2 The actual template in its raw state. A WYSIWYG HTML editor with which you can customize the contents, apply HTML formatting as well as insert the placeholder variables. The look and feel as well as the buttons and functionalities are similar to Microsoft FrontPage authoring tool.

3 Subject of the active template. It is also customizable and can take placeholder variables.

4 A list of all placeholder variables available for inserting into a particular template. In runtime (that is, when the actual email is generated from the template), the enclosed variables will be substituted by their corresponding values.

The followings list all the supported variables:

Variable	Purpose
CASE_BODY	Description of the support request case
CASE_ID	Case Number of the generated support case
CASE_SUBJECT	Subject of the email or the support case
CASE_CREATED_BY	The help desk staff that created/logged the support request
CASE_RECEIVED_DATE	Date and time the email was received
CASE_CREATED_DATE	Date and time the support case was created/logged
CASE_CATEGORY	Problem category to which the case belongs to
CASE_TYPE	Problem type to which the case is related with
CASE_STATUS	Status of the case with regards to the problem
CASE_TIMESPENT_DESCRIPTION	Description on each time that an agent spent in working on the case
CASE _TOTAL_TIMESPENT	Total time spent (in minutes) on the case
CASE_NOTES	Nodes added on the case by technicians and managers
CASE_CALLER_NAME	Name of the caller who had requested for help
CASE_CALLER_EMAIL	Email address of the caller
CASE_CALLER_PHONE	Telephone number of the caller
CASE _CALLER_MOBILE	Mobile number of the caller
CASE_CALLER_ADDRESS	Full address of the caller
CASE_CALLER_COMPANY	Company name of the caller
CASE_AGENTS	Agents assigned to the case
CASE_EMAILS_AGENTS	The email addresses of the assigned agents
CASE_MOBILES_AGENTS	The mobile numbers of the assigned agents
CASE_DUE_DATE	Due date assigned to the case within which the case has to be resolved
CASE_RESPONSE_DATE	The date within which the first response to the caller should have been made by the assigned agent
CASE_FIRST_RESPONSE_DATE	The date the first response to the caller was made after the case was logged in the system
CASE_PRIORITY	Priority of the case
CASE_AGE	The age of the case

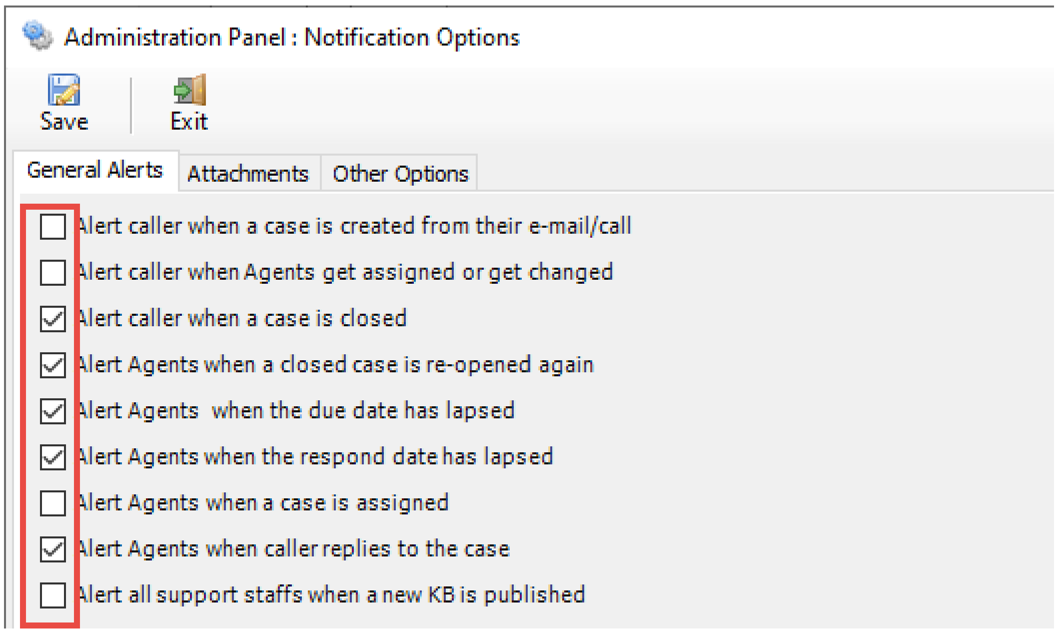
TIME_NOW	Current date and time
CASE_REPLIED_EMAIL_BODY	Description body of the caller replied email
CASE_REPLIED_EMAIL_SUBJECT	Subject of the caller replied email
KB_ID	The unique ID of the KB article
KB_BODY	Description body of the newly published KB article
KB_SUBJECT	Subject of the newly published KB article
KB_CATEGORY	Problem Category of the newly published KB article
KB_TYPE	Problem Type of the newly published KB article
KB_CREATED_BY	The person that created the KB article
KB_CREATED_DATE	Creation date of the newly published KB article

5 **Reset** button – click this to reset any changes made to the selected template and revert back to the original template content.

4.7 Notification Options

Automatic Email Notifications - Automatic email notifications are essential for keeping callers and agents informed with the progress and status of the case. AssistMyTeam Helpdesk offers a whole lot of notification options for different events such as when a case is created, changed or resolved, or when an agent is assigned to the case, or when the due date has lapsed etc. The template for such a notification email is available for customization as discussed earlier. Automatic emails are sent out directly when a relevant event occurs and the whole exercise is transparent to the agents.

Check the box of email of the corresponding notification that you want to enable and then click **'Save'** button.



1

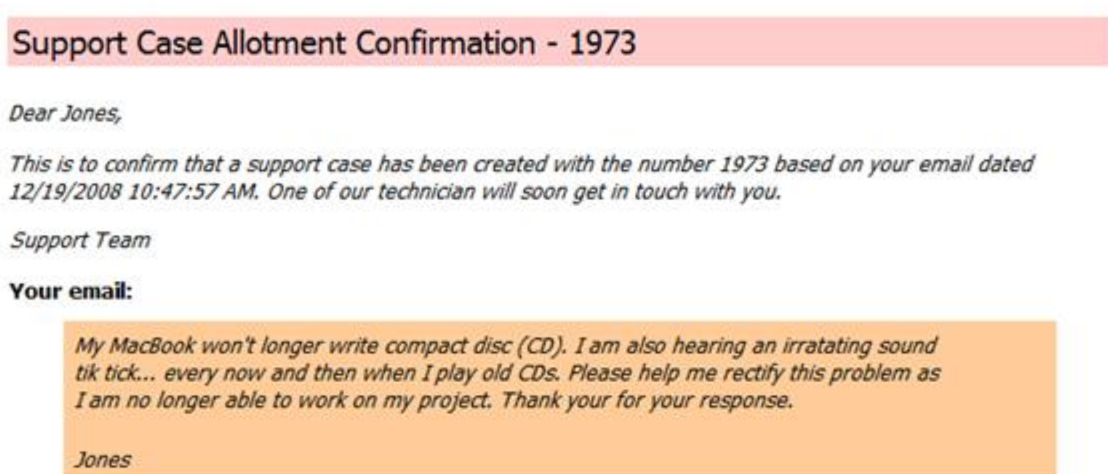
Email Alerts
Here you can enable or disable automated email notifications. To enable a particular email notification, check the corresponding box.
NOTE: To customize the template of each of the notification as per your requirement, use the Templates Manager.

Automated Email Notification Samples

Here are few samples of automated email notification as send to recipient from AssistMyTeam Helpdesk.

Email notification to caller when a support case is logged from an email/call

As soon as a support case is logged with AssistMyTeam Helpdesk, a notification email is sent out automatically to the caller (using a customizable template) informing about the detail of the generated case including the case number.


Support Case Allotment Confirmation - 1973

Dear Jones,

This is to confirm that a support case has been created with the number 1973 based on your email dated 12/19/2008 10:47:57 AM. One of our technician will soon get in touch with you.

Support Team

Your email:

My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.

Jones

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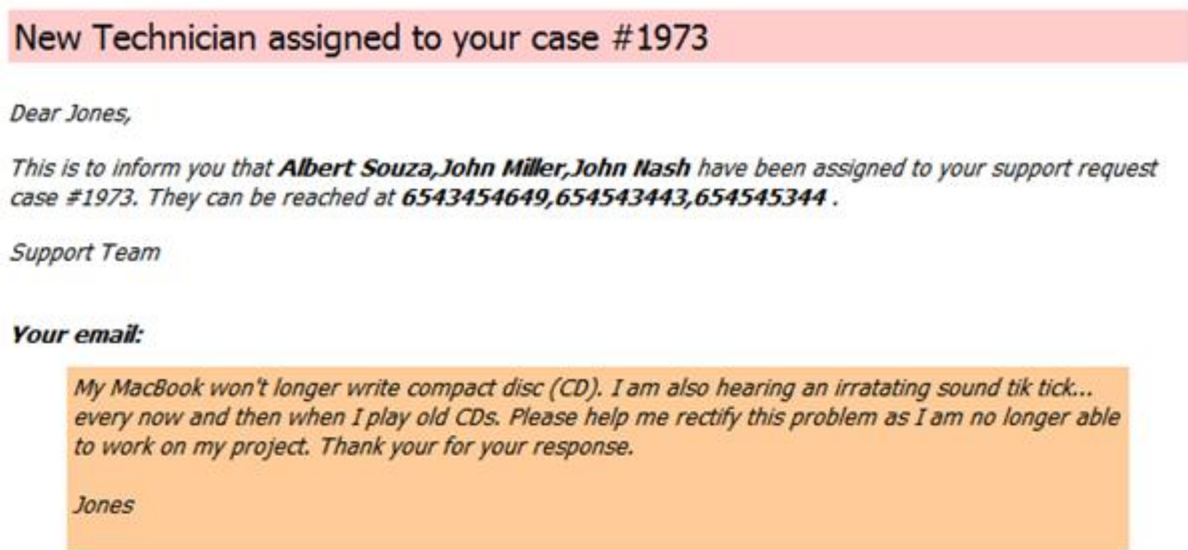
Email notification to caller when technicians are assigned to their cases

Consider a new case which the manager assigns it to an agent. As soon as the case is saved, the helpdesk add-in automatically sends out the notification email to caller (using a customizable template) informing about the assignment of a new agent. If existing agents are changed, the same notification would be triggered and the caller is notified again.



New Technician assigned to your case #1973

Dear Jones,

*This is to inform you that **Albert Souza,John Miller,John Nash** have been assigned to your support request case #1973. They can be reached at **6543454649,654543443,654545344** .*

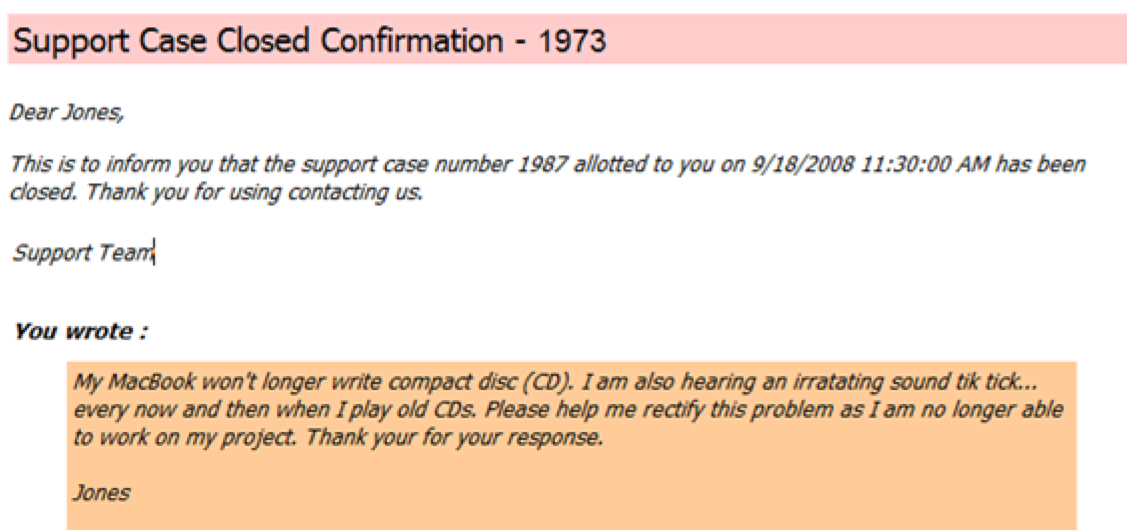
Support Team

Your email:

> *My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.*
>
> *Jones*

Email notification to caller when a case is closed

When an agent marked a support case as fixed, it is closed. At the same time, a notification email is sent out automatically to the caller (using a customizable template) informing about the closure of the case.



Support Case Closed Confirmation - 1973

Dear Jones,

This is to inform you that the support case number 1987 allotted to you on 9/18/2008 11:30:00 AM has been closed. Thank you for using contacting us.

Support Team

You wrote :

> *My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.*
>
> *Jones*

Email notification to assigned agents when a case is reopened

This scenario would happen when the caller replies back to a support case that had been already marked as resolved. AssistMyTeam Helpdesk would then automatically reopen the case and sent notification email to the assigned agents.

Case Re-opening notification for case - 1973

Dear Albert Souza,John Miller,John Nash,

This is to inform you that support case #1973 (which was assigned to you) has been re-opened again! Please attend to this case (Jones, Jones@angelheart.com) at the earliest possible.

Support Team

Jones (Jones@angelheart.com) wrote :

> *My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.*
>
> *Jones*

Email notification to assigned agents when the due date is about to lapse

This is a notification send to the assigned agents when the agents failed to resolve the case within the stipulated due date.

Due Date lapsed notification for case - 1973

Dear Albert Souza,John Miller,John Nash

This is to inform you that the due date (12/19/2008 6:30:00 PM) of case #1973 (which was assigned to you) is about to lapse! Please attend to this case at the earliest.

Support Team

Jones (Jones@angelheart.com) wrote :

> *My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.*
>
> *Jones*

Email notification to agents when a case is assigned

An automatic notification email would be sent out to the assigned agents when cases are assigned.

Support Case Assignment - 1973

Dear Albert Souza,John Miller,John Nash,

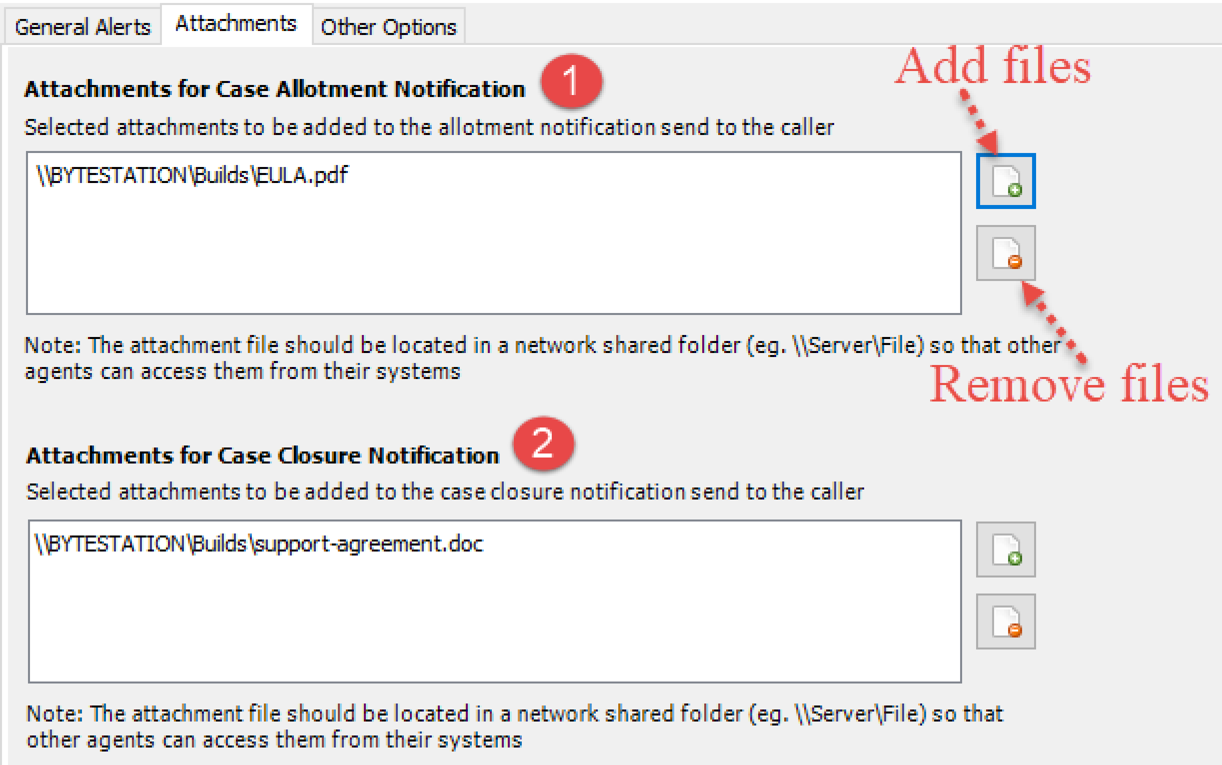
This is to inform you that the support case number 1973 has been assigned to you on 12/19/2008 2:18:12 PM. You are requested to start working on this case at the earliest.

Support Team

Jones (Jones@angelheart.com) wrote :

> *My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.*
>
> *Jones*

Adding Attachments to automated notification emails



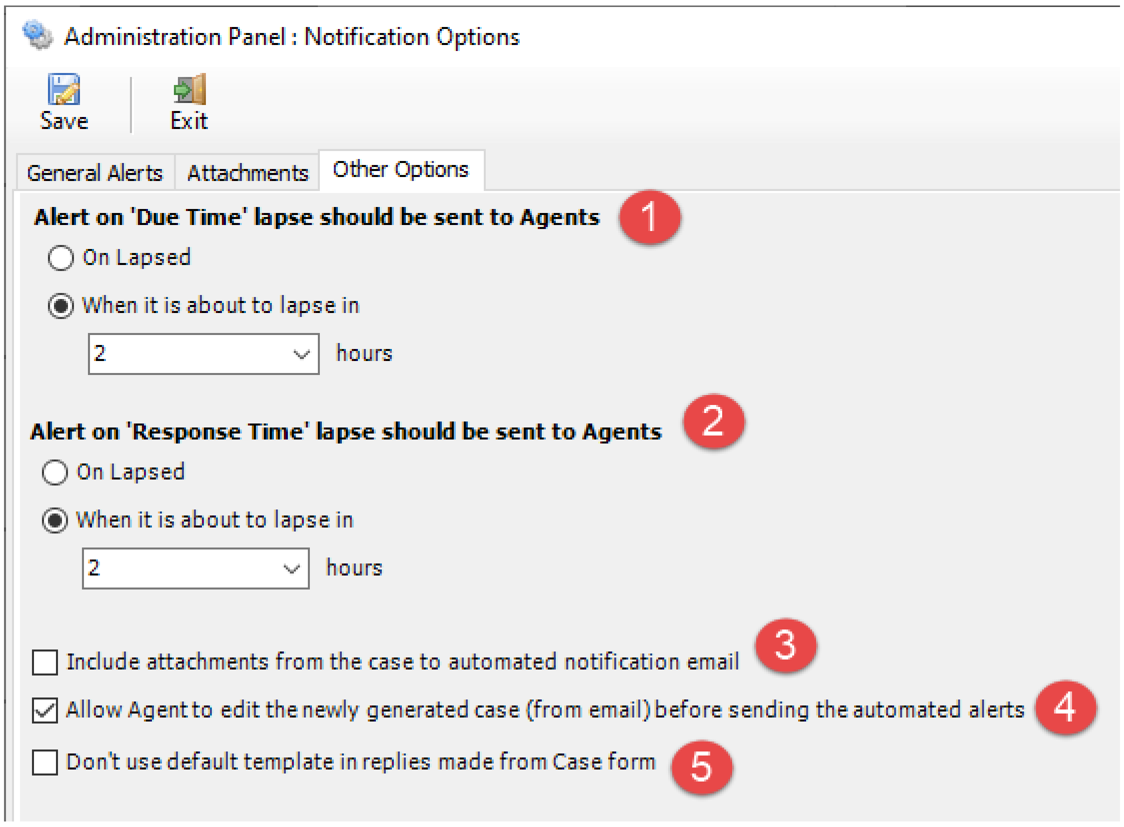
1. **Attachments to include in case allotment notification** - Often most helpdesk policy requires that certain documents such as EULA, disclaimer or Service agreements etc., are also send along with the automated email to the caller when a ticket is allotted.

   NOTE: Such document files should be placed on a network shared folder e.g., \\Server\File so that, AssistMyTeam Helpdesk add-ins of all technicians are able to access the files from their systems on the network.

2. **Attachments to include in case completion notification** - And likewise, you can configure AssistMyTeam Helpdesk add-in to include certain documents when sending out the automated email about case closure to the caller.

   NOTE: Such document files should be placed on a network shared folder e.g., \\Server\File so that, AssistMyTeam Helpdesk add-ins of all technicians are able to access the files from their systems on the network.

Configure Alerts Workflow



1 **Alert on 'Due Time' lapse should be sent to Agents**
When the due date of a case approaches or is about to be lapsed, you can specify how and when AssistMyTeam Helpdesk add-in should notify the assigned agents (of the case).

For instance, if you want the add-in to notify the agents only after the due date has lapsed, then choose the first option '**On Lapsed**'.

On the other hand, if you want the agents to be warned well before the due date is about to be lapsed, then choose the second option **'When it is about to lapse in'** and specify number of hours before such notifications are to be sent to the agents.

2 **Alert on 'Response Time' lapse should be sent to Agents**
When the respond by date of a case approaches or is about to be lapsed, you can specify how and when AssistMyTeam Helpdesk add-in should notify the assigned agents (of the case).

For instance, if you want the add-in to notify the agents only after the respond by date has lapsed, then choose the first option '**On Lapsed**'.

On the other hand, if you want the technicians to be warned well before the respond by date is about to be lapsed, then choose the second option **'When it is about to lapse in'** and specify number of hours before such notifications are to be sent to the agents.

3 **Include attachments from the case to automated notification email**
If enabled, the add-in will include copies of the attachments, if present in the case item, into the automated notification emails.

4 **Allow Agents to edit the newly generated case (from email) before sending the automated alerts)**
By default, when generating a case from an e-mail (through the 'Convert to Case' button), the add-in assigns a new ID and accordingly, the allotment and agent notification e-mails are sent instantly.

However, if your helpdesk workflow requires that the technicians add more information to the new case, like an attachment or caller address etc., before the add-in can send out the automated notifications, you can enable this

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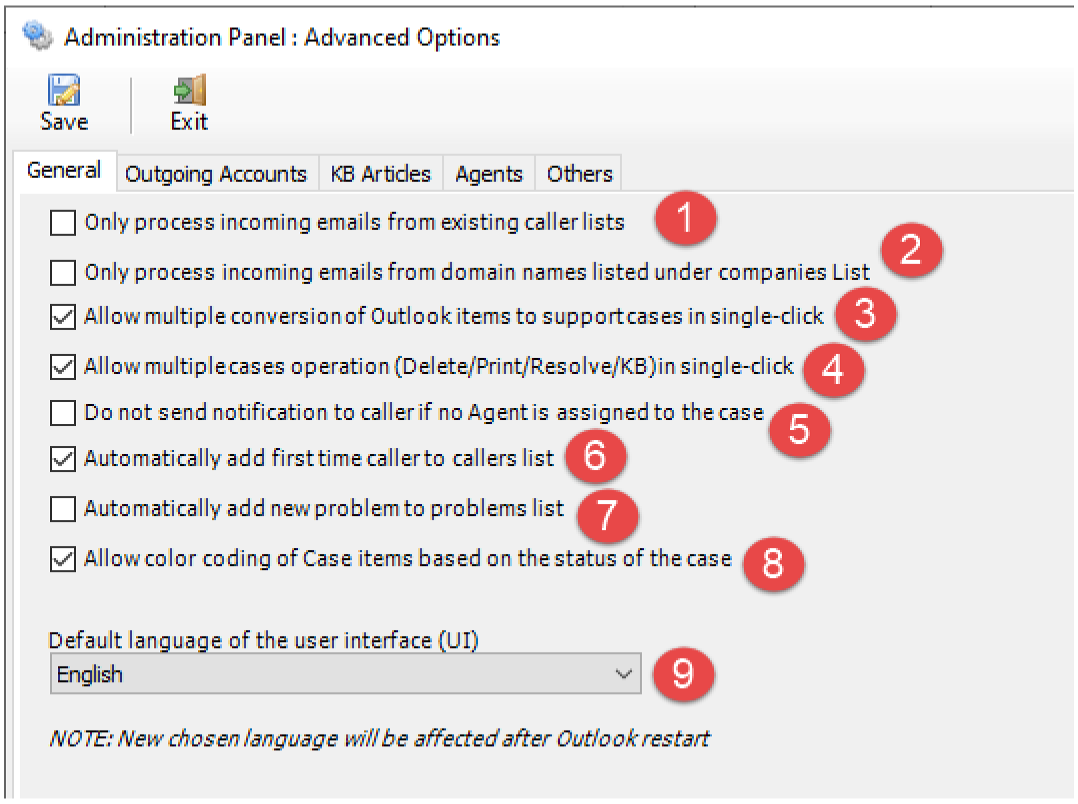
option. When enabled, the helpdesk add-in would display the newly generated case instantly allowing the agent to alter/add information such as custom fields, attachments or assigning it to another agent, for example.

Only when the technician clicks 'Save' button, the add-in will assign a new ID and send out the notification to the caller/assigned technicians.

5 **Don't use default template in replies made from case form**
If enabled, when agent clicks the 'reply to last email' button in the case form and no recent replies from the caller exists, the add-in will use a blank template instead of the ‘Email to Caller’ template.

4.8 Advanced Options

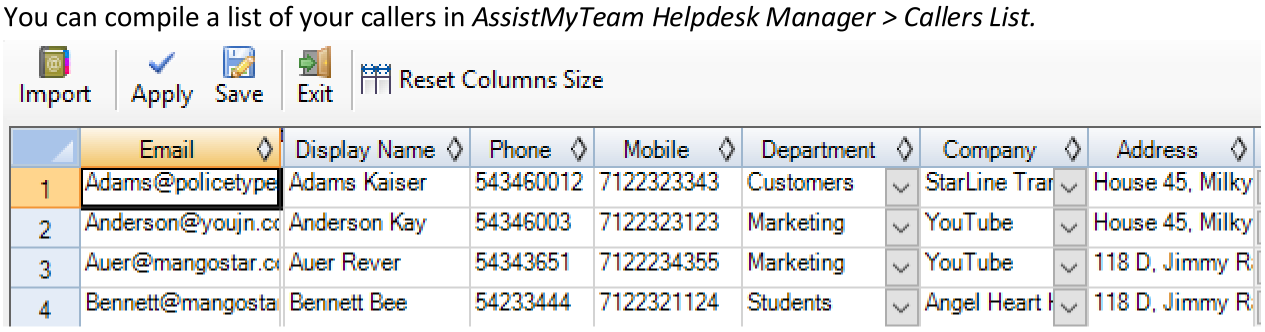
With the advanced options, managers can control and streamline how agents interact and complete cases in Outlook.



1 Only process incoming emails from existing caller lists

Check this option to only process support requests coming from callers that already existed in the AssistMyTeam Helpdesk callers list. Any emails from outside the caller list are simply ignored by the add-in. For monitored folders and mailboxes, emails that are not from the callers list are moved to a subfolder 'Unprocessed Emails'. Please note that, to use this feature, technicians would need to have a higher permission (such as Publishing editor or owner) over the monitored mailbox or folder. By default, this option is disabled.

You can compile a list of your callers in *AssistMyTeam Helpdesk Manager > Callers List.*

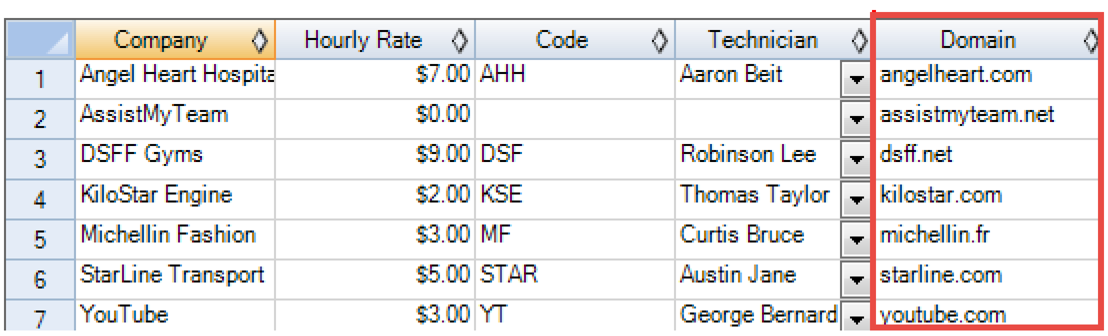


Import Apply Save Exit Reset Columns Size

	Email	Display Name	Phone	Mobile	Department	Company	Address
1	Adams@policetype	Adams Kaiser	543460012	7122323343	Customers	StarLine Trar	House 45, Milky
2	Anderson@youjn.cc	Anderson Kay	54346003	7122323123	Marketing	YouTube	House 45, Milky
3	Auer@mangostar.cc	Auer Rever	54343651	7122234355	Marketing	YouTube	118 D, Jimmy R
4	Bennett@mangosta	Bennett Bee	54233444	7122321124	Students	Angel Heart I	118 D, Jimmy R

2 Only process incoming emails from domain names listed under companies list

By default, helpdesk add-in can raise support cases from any emails. However, if your support policy is only confined to customers from known or trusted companies or domains, you could configure AssistMyTeam Helpdesk to only process helpdesk related activities and workflow from emails sent from admin specified domain names. And emails from outside the trusted domains would be skipped. To implement this selective processing policy, the manager needs to define such list of trusted domains under *AssistMyTeam Helpdesk Manager > Callers List > Company* tab.



	Company	Hourly Rate	Code	Technician	Domain
1	Angel Heart Hospita	$7.00	AHH	Aaron Beit	angelheart.com
2	AssistMyTeam	$0.00			assistmyteam.net
3	DSFF Gyms	$9.00	DSF	Robinson Lee	dsff.net
4	KiloStar Engine	$2.00	KSE	Thomas Taylor	kilostar.com
5	Michellin Fashion	$3.00	MF	Curtis Bruce	michellin.fr
6	StarLine Transport	$5.00	STAR	Austin Jane	starline.com
7	YouTube	$3.00	YT	George Bernard	youtube.com

So, when you or other technicians try to generate a new case from an email send from an unlisted domain, AssistMyTeam Helpdesk would not process and instead a popup message would be shown that the email sender domain is not trusted.

3 **Allow multiple conversion of Outlook items to support cases in a single click**
To increase productivity, this option enables a technician to convert multiple selected Outlook items such as emails, appointments or tasks to support request cases in a single-click. Use the '**Convert to case**' button to achieve this. By default, AssistMyTeam Helpdesk processes a single email to support case, no matter how many emails were selected.

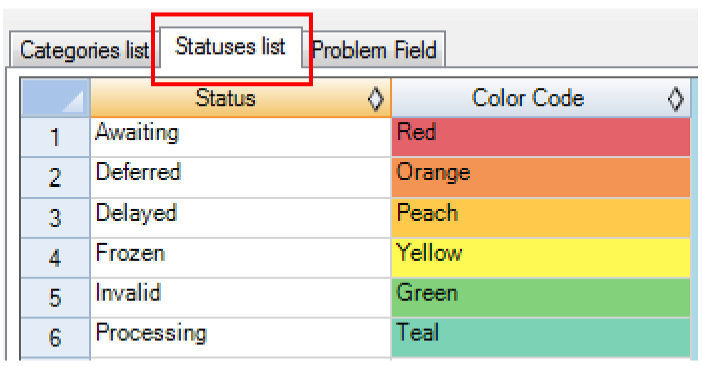
4 **Allow multiple cases operation (Delete/Print/Resolved/Create KB) in a single click**
This option enables a technician to batch-process any support case specific operations such as marking as resolved, deleting, printing, re-opening etc. on multiple support cases. By default, AssistMyTeam Helpdesk processes a single support case when such operation is initiated.

5 **Do not send notification to caller if no agent is assigned to the case**
Enable this option so that the add-in skips sending automated notifications to caller if the allotted case has not been assigned an agent.

6 **Automatically add first time caller to callers list**
If enabled, when a new first-time caller seeks support request (when they send an email to support), the helpdesk add-in will automatically add it to the list of callers in helpdesk database, for future use.

7 **Automatically add new problem to Problems list**
If enabled, when a new problem category or type (that does not exist in Problems list yet) is entered by the technician in the case form in Outlook, the helpdesk add-in will automatically add it to the list of problems in helpdesk database, for future use.

8 **Allow color coding of case items based on the status of the case**
If enabled, when you set the status of the case or when the add-in does that automatically using the default status values set for various events, you will see that the categories column of the case item has color-coded status (which you can define for each status under the column '**Color Code**' in *AssistMyTeam Helpdesk Manager > Problems List > Statuses List*).


Categories list | Statuses list | Problem Field

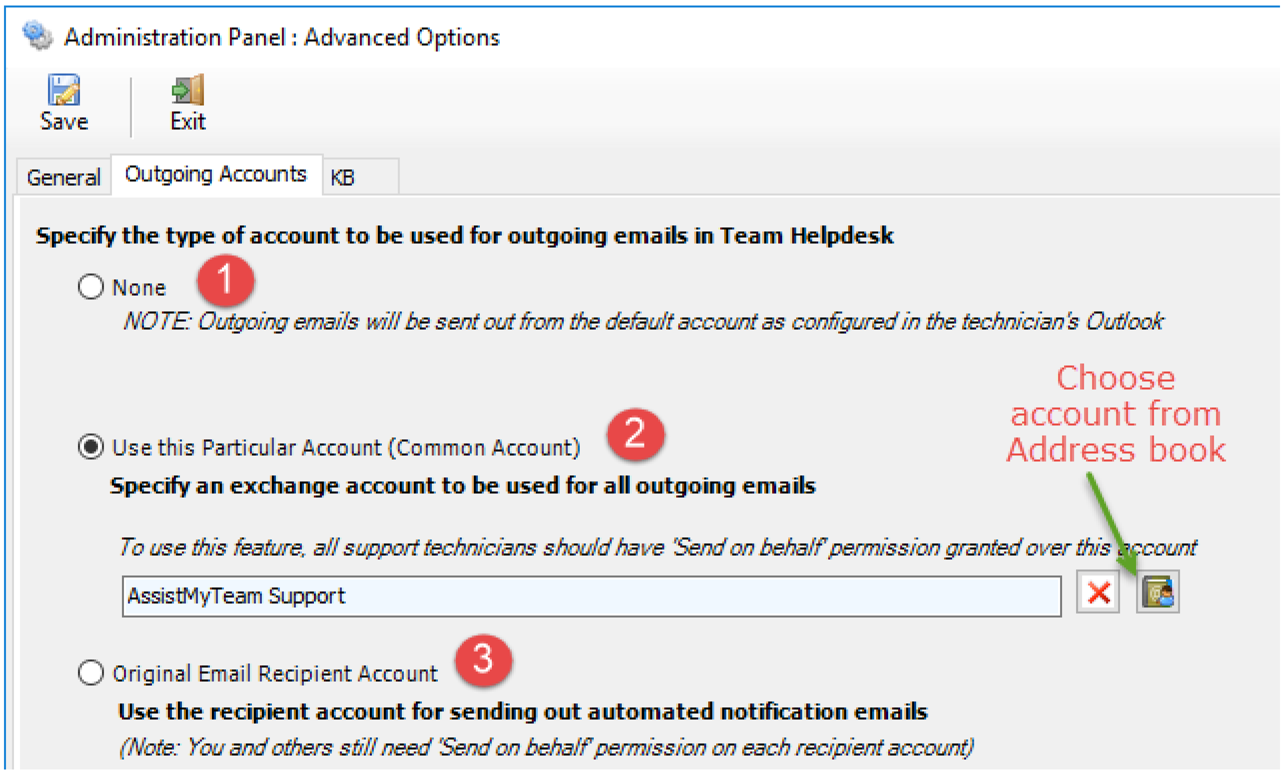
	Status	Color Code
1	Awaiting	Red
2	Deferred	Orange
3	Delayed	Peach
4	Frozen	Yellow
5	Invalid	Green
6	Processing	Teal

9 **Default language of the user interface (UI)**
AssistMyTeam Helpdesk add-in supports the following languages: **English, Español, Norwegian, Danish, Dutch, Deutsch, French, Finnish, Swedish, Portuguese.**

Choose a language from the drop-down to use with AssistMyTeam Helpdesk add-in in its User Interface (UI).

NOTE: This setting will only take into effect once your restart Outlook.

Configuring Outgoing Accounts

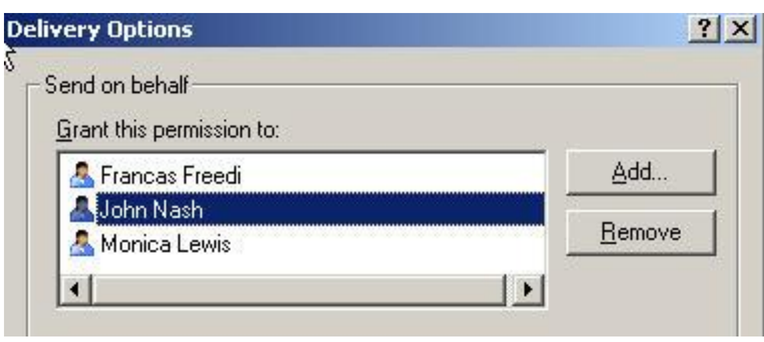


In *AssistMyTeam Helpdesk Manager > Advanced Options > Outgoing Accounts* tab, you can specify which mailbox account would AssistMyTeam Helpdesk add-ins use to send out the automated notification alerts and replies to callers and technicians.

1. When you select the first option **'None'**, AssistMyTeam Helpdesk will use the default/primary mail account that is configured on the Outlook profile to send out the alerts and replies. You should use this option if you want each technician to send out the auto-alerts and replies from their associated default account.

2. However, if you want a centralized or single account to use for all outgoing emails and alerts, choose the second option **'Use this particular account'**. This is ideal if you have a common account (e.g., *support@yourdomain.com*) and you want the replies and auto-alerts received by the caller to appear to come from this common account (in the from field of the email) no matter which technician is replying/sending those alerts/emails from their Outlook.

   <u>**Note:**</u> To work with this feature, the helpdesk manager has to explicitly grant **'Send on behalf'** of rights to the technicians. You do that from the windows server: *Active Directory Users and Computers > Common account > Properties > Exchange General > Delivery Options*.

   When both 'Send As' and 'Send Behalf of' are enabled, the add-in will try to use the 'Send As' permission as first preference. If that fails, it will fall back to using 'Send behalf of'.

3. The last option is to configure AssistMyTeam Helpdesk to send out notification emails and responses, using the **'Original Email recipient mailbox account'**. For example, assume you have two mailboxes, Support and Sales. And you receive support request email, say email A, to Support mailbox, and email B, to Sales mailbox. When AssistMyTeam Helpdesk processes and generates a case from each of these emails (either manually or automatically), AssistMyTeam Helpdesk will use the recipient account, for sending out the notification emails.

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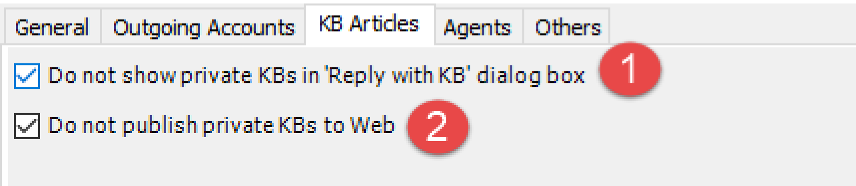
So, when sending notification email to Caller A, AssistMyTeam Helpdesk will send it from Support account. i.e., the **from:** field of the email will have Support address, as the sender. Likewise, when sending notification email to Caller B, it will be sent from Sales account. i.e., the **from:** field of the email will have Sales address.

NOTE: You and other technicians, still need to have **'Send behalf'** permission over the Support and Sales mailboxes. Otherwise, you will receive an error response from your Exchange Server, regarding inadequate permission to send email from that particular account.

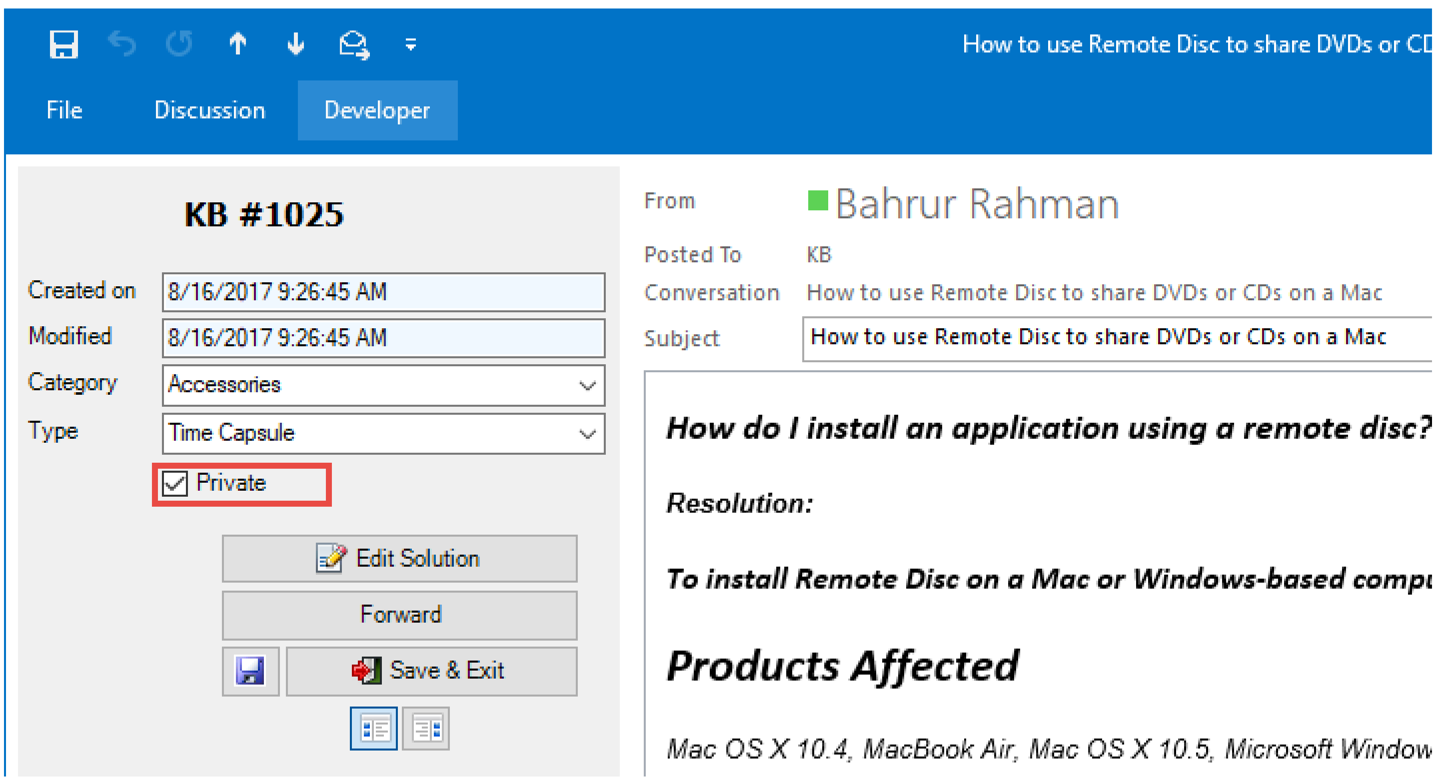
KB Settings



Sometimes, you might have requirements to create KB articles that deals with non-support issues. You can mark such articles as '**Personal'** to differentiate it from other KB articles. In *AssistMyTeam Helpdesk Manager > Advanced Options > KB* tab, you can specify additional options to deal with private KB articles.

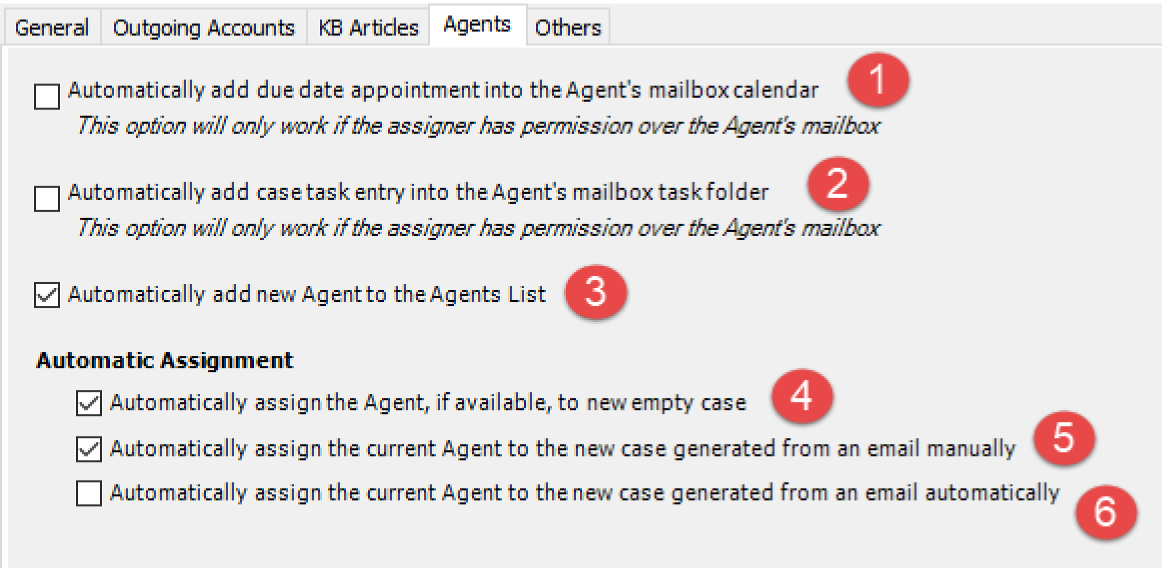
1 **Do not show private KBs in 'Reply with KB' dialog box**
Enable this option to hide private KB articles from appearing in the **'Reply with KB'** dialog box (to prevent technicians from accidentally using private KB articles to reply to emails).

NOTE: 'Reply with KB' option button is located under Outlook > Helpdesk toolbar in your Inboxes.



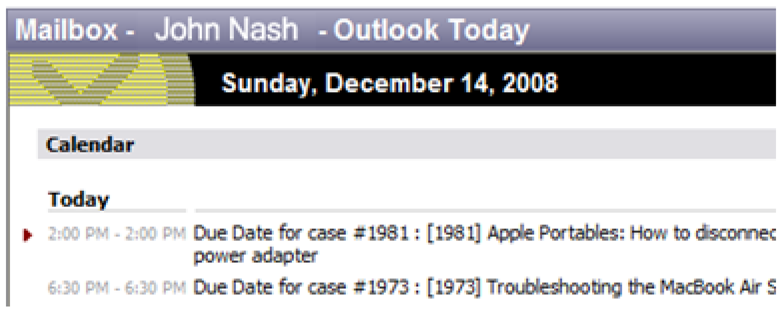
2 **Do not publish private KBs to Web**
Enable this option to exclude private KB articles from being exported and published.

Agents Settings



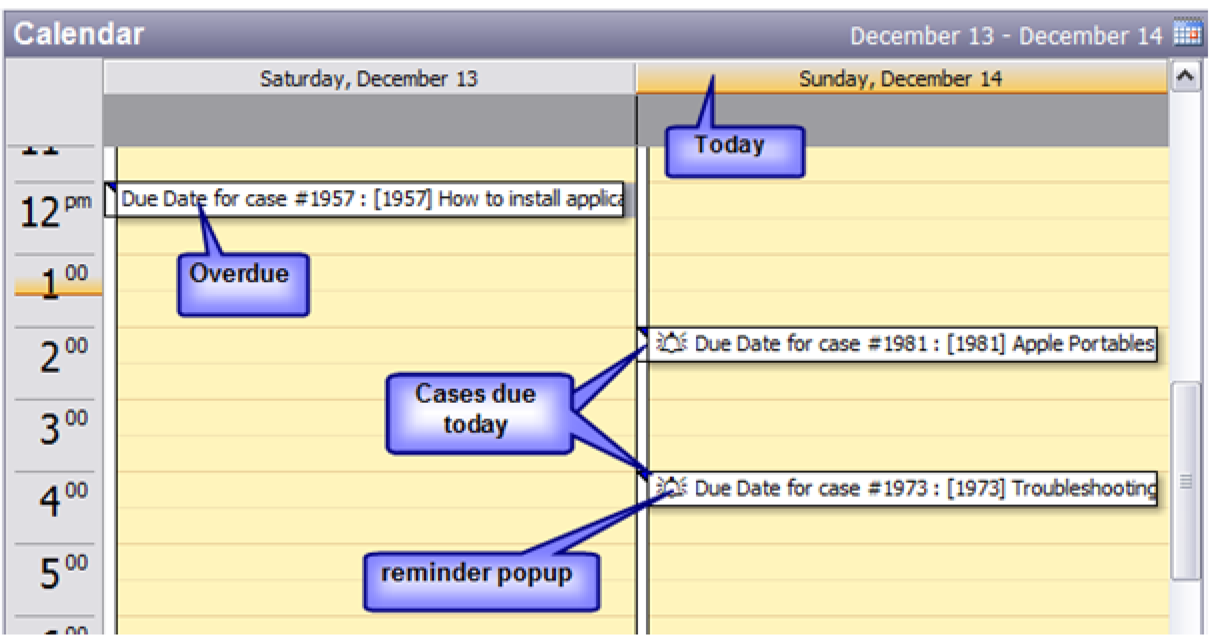
1

Enables AssistMyTeam Helpdesk to add/update an appointment into the assigned agent's mailbox calendar when the managers assign/change the due date on a support case. Any change in the due date of that case at a later stage will be automatically updated to the existing appointment in the mailbox. This appointment is removed when the corresponding case is closed.

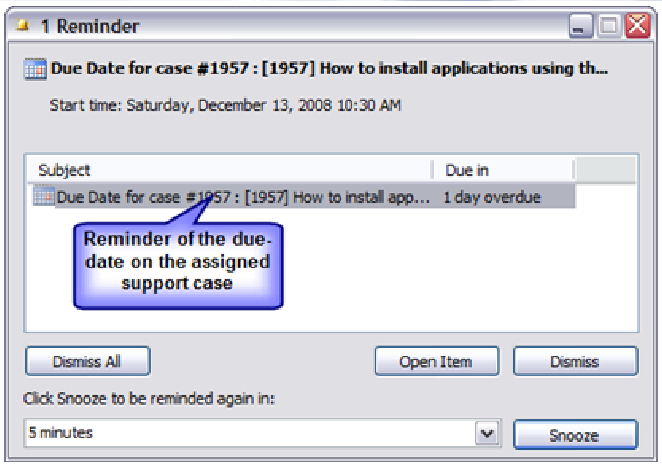


These helpdesk due date appointments appear in summarized form on the main 'Outlook Today' page when the agent starts Outlook. This way, the agent gets to know which new cases are being assigned to him/her

In the default calendar, the due date appointments appear as any other appointment. The case number and the subject of the assigned case in the appointment subject differentiate it from other personal appointments.

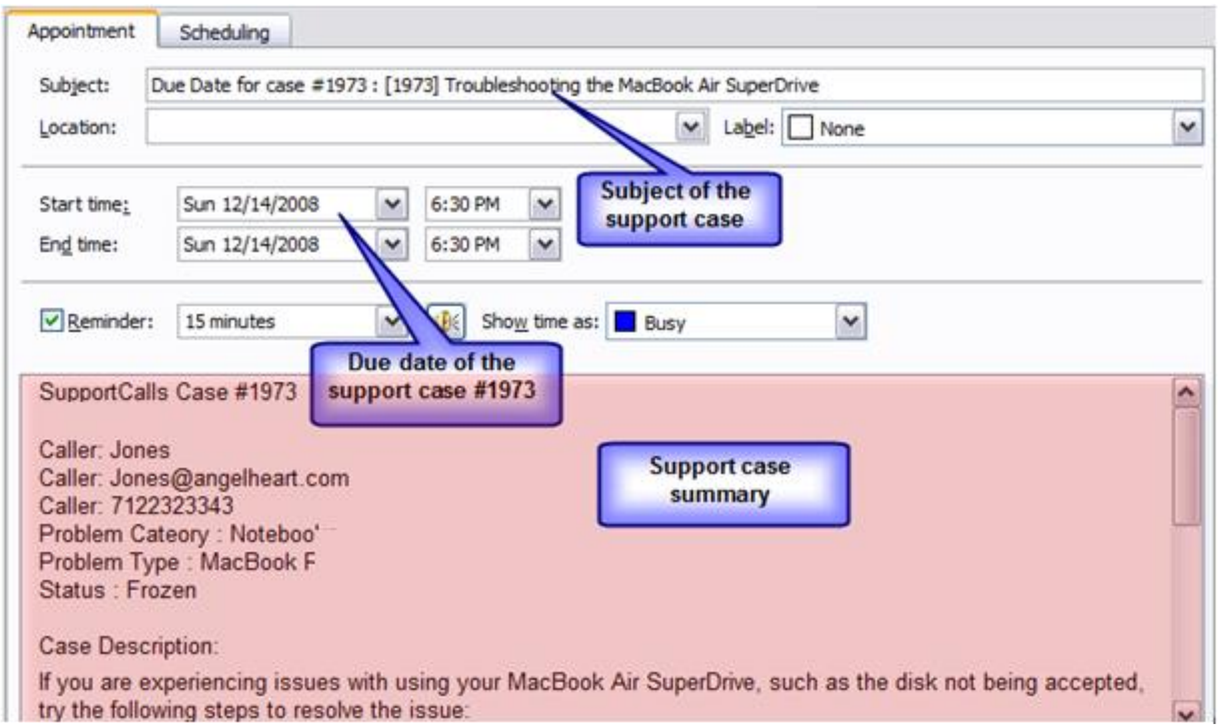


When the due date appointments are about to be overdue, Outlook automatically displays reminders popup to the agent. This way, the agent is alerted about the pending cases which need his/her attention.



The details of a due date appointment added from AssistMyTeam Helpdesk to the agent's mailbox calendar:

- *the case number and case subject are available in the appointment' subject*
- *the due date of the case is the same as that of the start time and end time of the appointment*
- *The appointment description also informs the technician about the caller, and a summary of the problem*



2. Enables AssistMyTeam Helpdesk to add/update a task into the responsible agent's mailbox task folder when the managers assign/change the due date on a support case. Any change in the due date of that case at a later stage will be automatically updated to the existing task in the mailbox. This task is removed when the corresponding case is closed.

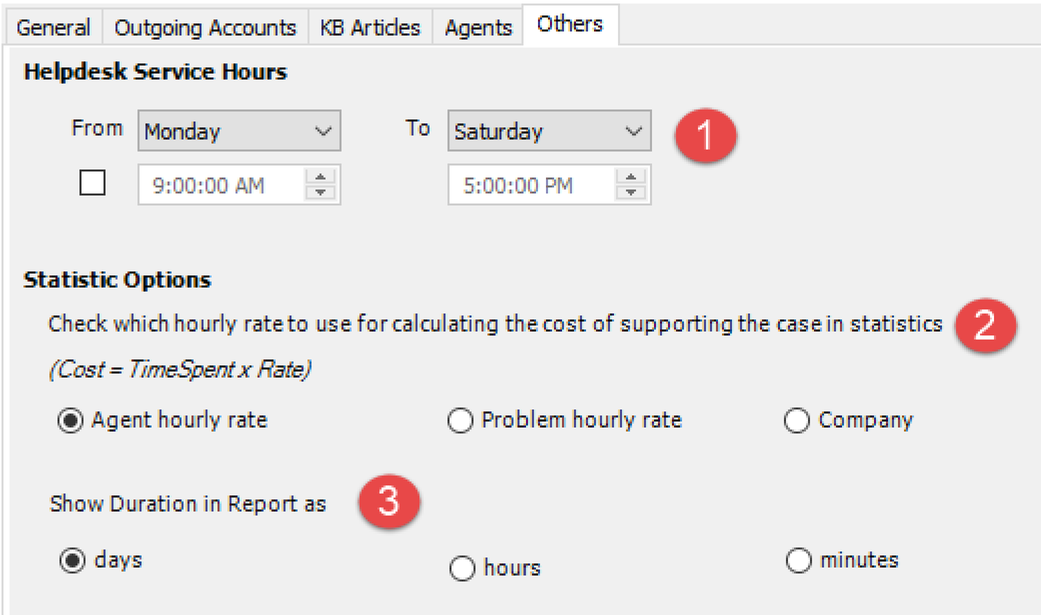
3. **Automatically add new Agent to the Agents List**
   Enable this option to auto add first time new agent to the Agents List of the helpdesk database.

4. Enable this option if you want AssistMyTeam Helpdesk to automatically assign the default technician (specified for a particular caller in the callers list) to a support case. By default, this option is enabled.

5. Enable this option if you want AssistMyTeam Helpdesk add-in to automatically assign the current agent to the new case generated from an email manually.

6. Enable this option if you want AssistMyTeam Helpdesk add-in to automatically assign the current agent to the new case generated from an email automatically.

Others Settings



1 **Helpdesk Service Hours -** Enables managers to specify the service days and hours their helpdesk operates. With this mechanism, any automatic assignment of response by date or due date to support cases would be dynamically adjusted to fall within the service days and hours. By default, service day start from Monday and ends at Saturday. You can choose the service starting and ending days as per your helpdesk requirement.

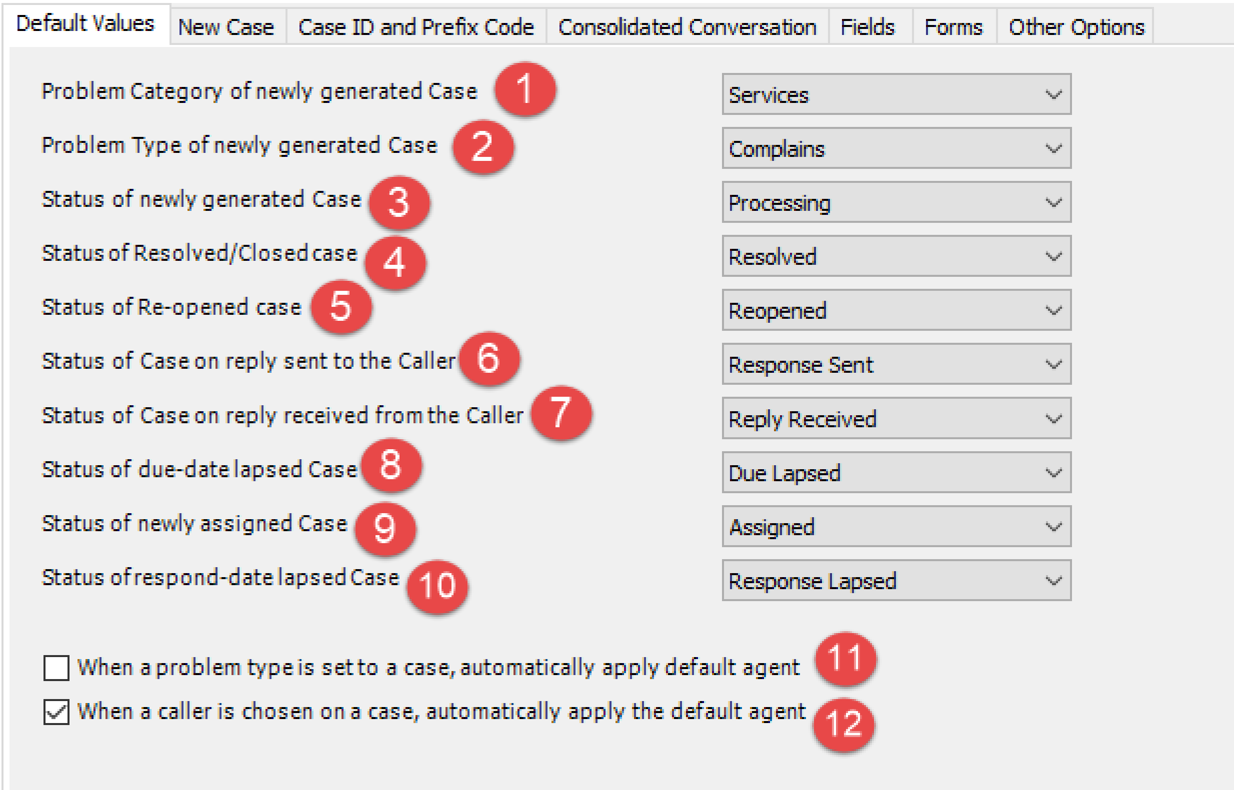
Once a service days and hours are specified, respond by date or due date assignment will take note of the helpdesk unavailability accordingly. That is, when 'due date' or 'respond by date' are enforced on a case automatically, the add-in will make sure, the 'response by date' or 'due date' is always set within the service hours band. So, no longer you or other agents would be sent respond by date or due date lapse automated alerts in off hours of the helpdesk.

2 **Check which hourly rate to use for calculating the cost of supporting the case in statistics**
Specify which hourly rate to use in statistics in calculating cost - **Agent** rate, **problem** rate, or **company** rate. This is useful if the organization use hourly rate to pay agents.

NOTE: To add or modify the hourly rate, refer below
For Agent rate: *AssistMyTeam Helpdesk Manager > Technicians List > Hourly rate*
For Problem rate: *AssistMyTeam Helpdesk Manager > Problems List > Categories*
For Company rate: *AssistMyTeam Helpdesk Manager > Callers List > Companies*

3 **Show Duration in reports as**
When you run reports or statistics, you have a choice to display duration fields (such as *Open Duration, Resolution Duration, Response Duration, Elapsed Duration*) in either **Days**, **Hours** or **Minutes**.

4.9 Case Options



1 **Problem Category of newly generated case**
Choose a particular problem category from the drop-down list that will be used as default value for Problem Category field on newly raised case. To add new problem category, refer to *AssistMyTeam Helpdesk Manager > Problems List > Categories* tab.

2 **Problem Type of newly generated case**
Choose a particular problem type from the drop-down list that will be used as default value for Problem Type field on newly raised case. To add new problem type, refer to *AssistMyTeam Helpdesk Manager > Problems List*.

3 **Status of newly generated case**
Choose a particular status from the drop-down list that will be used as default value for status field on newly raised case. To add new statuses, refer to *AssistMyTeam Helpdesk Manager > Statuses List*.

4 **Status of Resolved/Completed case**
Choose a particular status from the drop-down list that will be set to a resolved/completed case.

5 **Status of Re-opened case**
Choose a particular status from the drop-down list that will be set to the reopened case.

6 **Status of case on reply send to the caller**
Choose a particular status from the drop-down list that will be set to the case once a reply is successfully send to the caller.

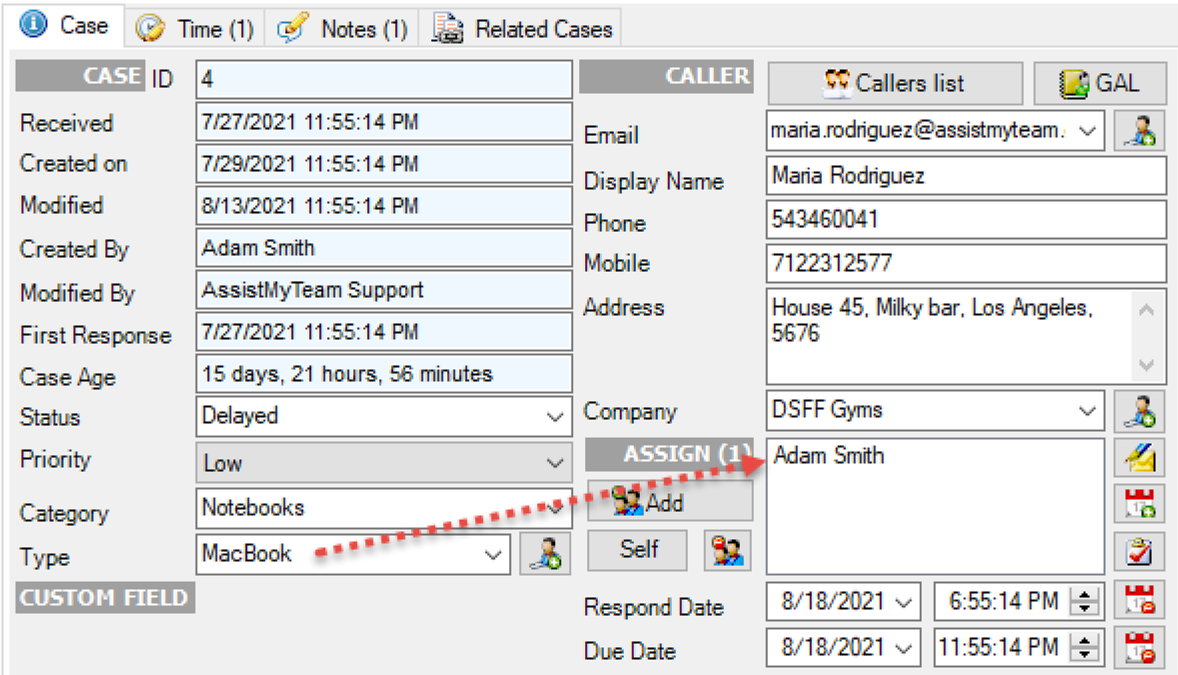
7 **Status of case on reply received from the caller**
Choose a particular status from the drop-down list that will be set to the case after a reply is received from the caller.

8 **Status of due date lapsed case**
Choose a particular status from the drop-down list that will be set to the case on due date lapsed.

9 **Status of newly assigned case**
Choose a particular status from the drop-down list that will be set to the case just after assigning to a technician.

10 **Status of respond by date lapsed case**
Choose a particular status from the drop-down list that will be set to the case on respond date lapse.

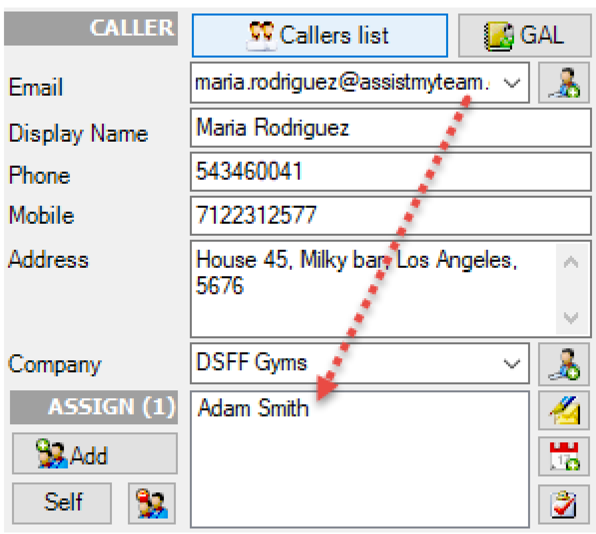
11 When a problem type is chosen from the drop-down field in the case form, you can configure if the helpdesk add-in will also automatically apply the **Agents** (that are default and associated with the chosen Problem Type) to the case.



You can choose default agents for each problem type under *AssistMyTeam Helpdesk Manager > Problems List.*

	Problem Type	Problem Category	Default Time	Code	Default Agent
1	iPhone	Mobiles	24.00	IPHONE	Abel Conie
2	iPhone 3G	Mobiles	25.00	IPHONE3G	Aaron Beit
3	MacBook	Notebooks	26.00	MCBOOK	Adam Smith
4	MacBook Pro	Notebooks	26.00	MCBOOKPRO	Adrien Silva

12 When a caller is chosen from the drop-down field in the case form, you can configure if the helpdesk add-in will also automatically apply the **agents** (that are default and associated with the chosen caller) to the case.



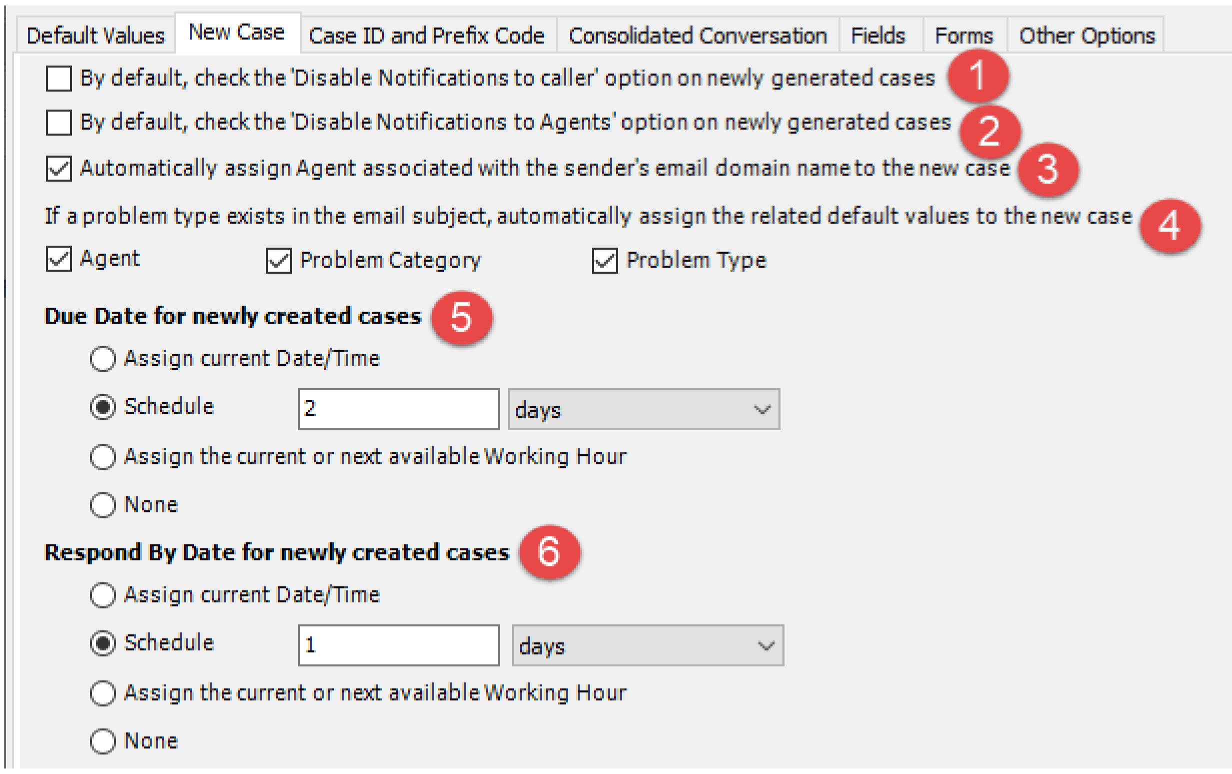
You can choose default agents for each caller under *AssistMyTeam Helpdesk Manager > Callers List.*

Administration Panel : Callers Information

Import Apply Save Exit Reset Columns Size

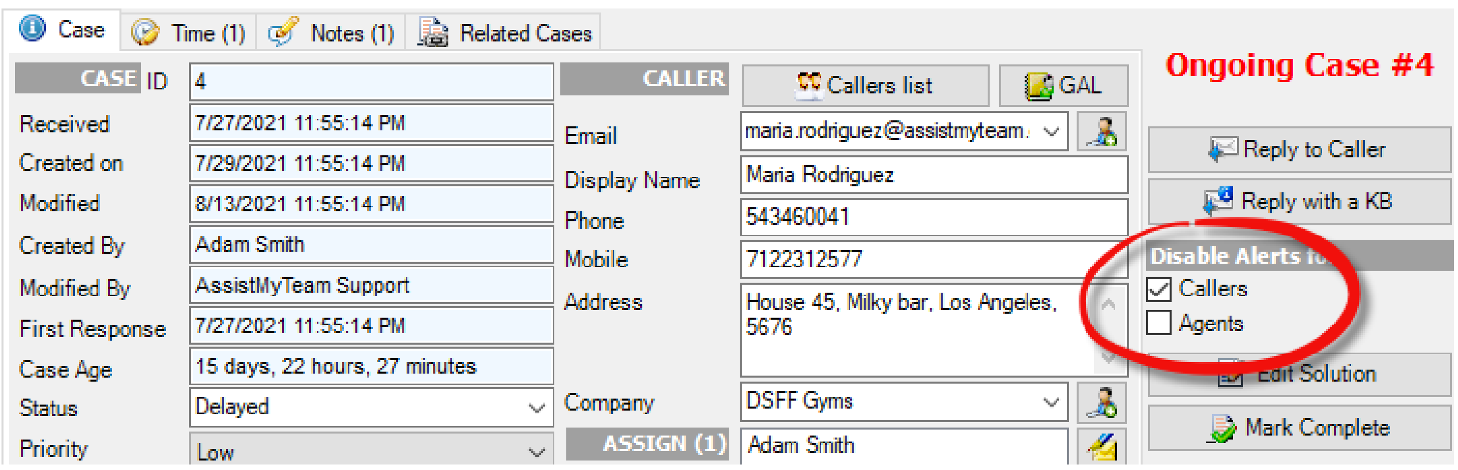
	Email	Display Name	Phone	Mobile	Company	Address	Default Agent
1	david.webs@assist	David Webs	543460013	7122323343	Angel Heart Hos	118 D, Jimmy Ray S	Aaron Beit
2	mardo.garcia@assi	Mardo Gargia	543460029	7122323111	KiloStar Engine	G4, Hummer Avenu	Abel Conie
3	maria.rodriguez@a	Maria Rodriguez	543460041	7122312577	DSFF Gyms	House 45, Milky bar	Adam Smith
4	davis.wong@assist	Davis Wong	543460052	7122321124	StarLine Transp	118 D, Jimmy Ray S	Adrien Silva
5	abu.hakim@assistn	Abu Hakim	543460073	7122234355	Michellin Fashic	V4, Yemen Road, P	Aung Hun
6	sunil.kumar@assis	Sunil Kumar	543460022	7122323343	YouTube	D3, Greater Kailash	Aaron Beit

New Case



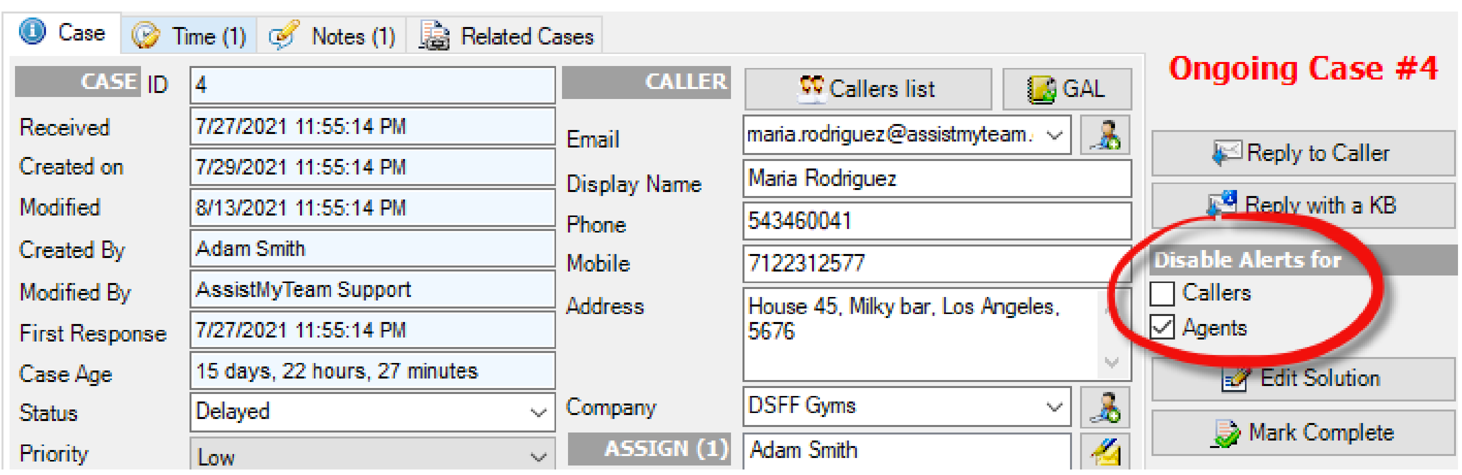
1 **By default, check the 'Disable Notifications to caller' option on newly generated cases**

Sometimes, on specific cases or caller, you may want helpdesk add-in not to send auto notifications on 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. Enable this option so that by default, notifications are turned off to caller for new cases.



2 **By default, check the 'Disable Notifications to Agents' option on newly generated cases**

Likewise, on specific cases, you may want helpdesk add-in not to send auto notifications on 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. Enable this option so that by default, notifications are turned off to assigned agents for new cases.



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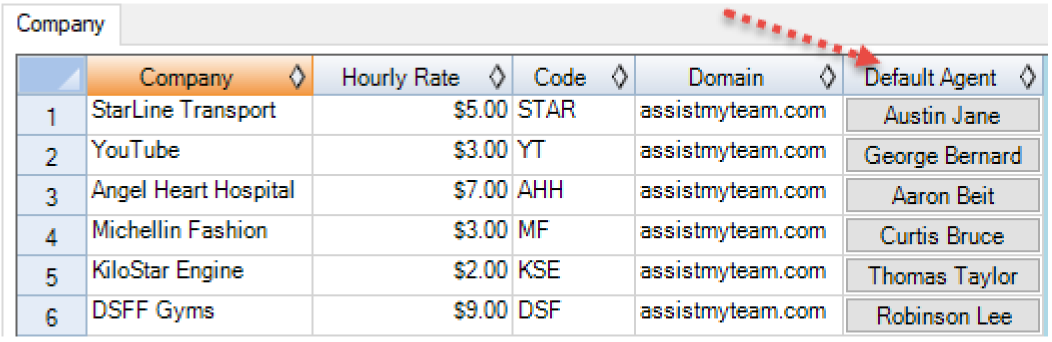
3 **Automatically assign agent associated with the sender's email domain name to the new case**
If enabled, helpdesk add-in will automatically assign default agent to a case based on the sender's domain address e.g., sender@somecompany.com

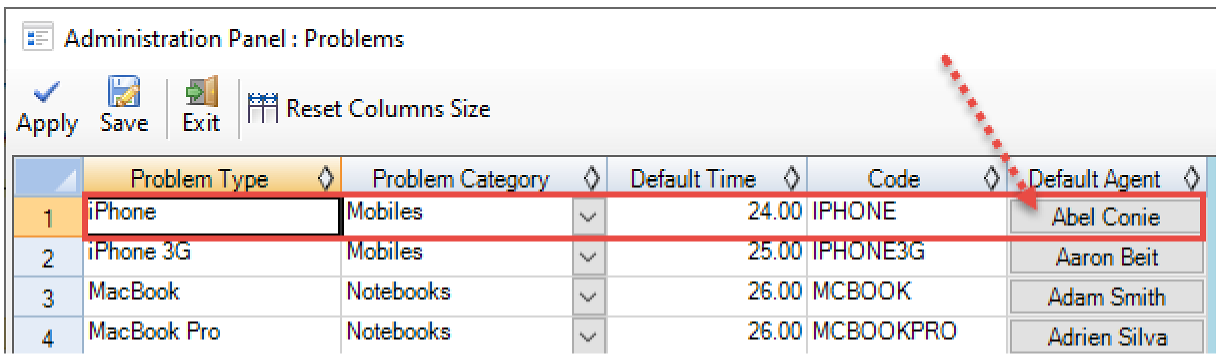


	Company	Hourly Rate	Code	Domain	Default Agent
1	StarLine Transport	$5.00	STAR	assistmyteam.com	Austin Jane
2	YouTube	$3.00	YT	assistmyteam.com	George Bernard
3	Angel Heart Hospital	$7.00	AHH	assistmyteam.com	Aaron Beit
4	Michellin Fashion	$3.00	MF	assistmyteam.com	Curtis Bruce
5	KiloStar Engine	$2.00	KSE	assistmyteam.com	Thomas Taylor
6	DSFF Gyms	$9.00	DSF	assistmyteam.com	Robinson Lee

NOTE: You can add company details under *AssistMyTeam Helpdesk Manager > Callers List > Company* tab. And add **somecompany.com** in the domain column and also specify default agent for that company.

4 **If a problem type exists in the email subject, automatically assign it and related default values to the new case**
If enabled, the helpdesk add-in will automatically search for the existence of any problem type keyword in the subject of emails. If exists, it would auto-assign the default values of the agent, or problem category fields (based on the admin enabled fields) to the case that are associated with the particular problem type.

For example, if the subject of the support request email contains the word '**iPhone**', the add-in can automatically assign the associated default values of '**iPhone**' Problem Type such as Problem Category '**Mobiles**' and Agent '**Abel Conie**' to the newly logged case.



	Problem Type	Problem Category	Default Time	Code	Default Agent
1	iPhone	Mobiles	24.00	IPHONE	Abel Conie
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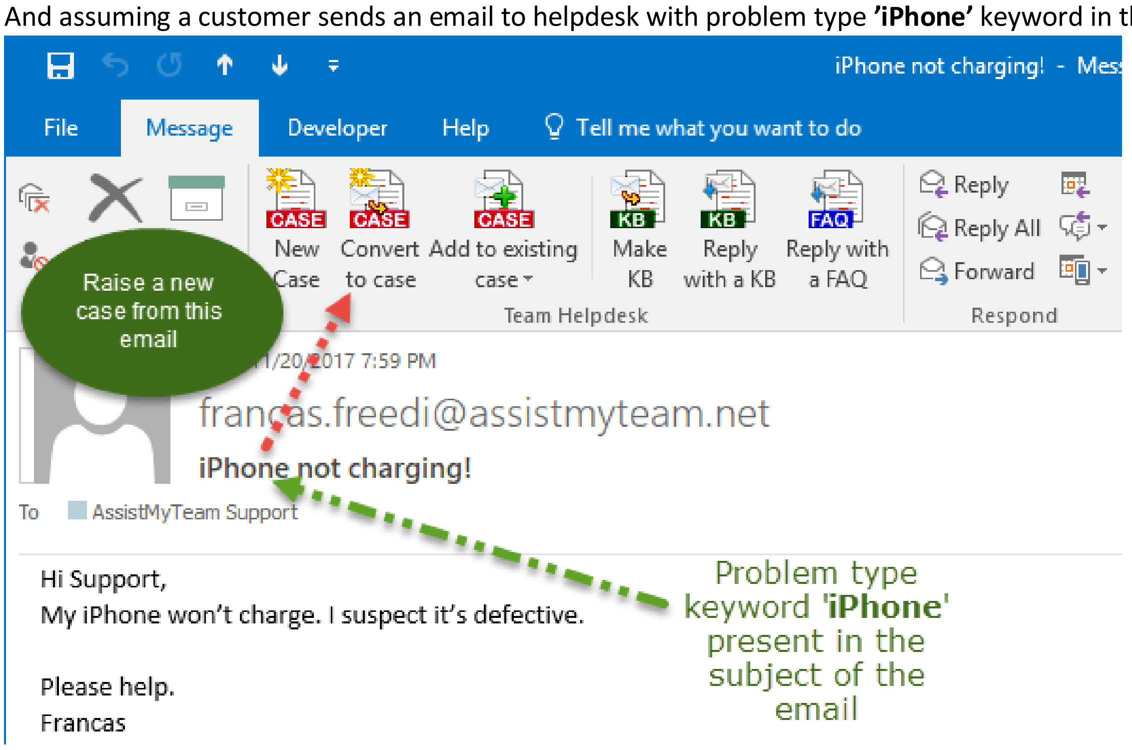
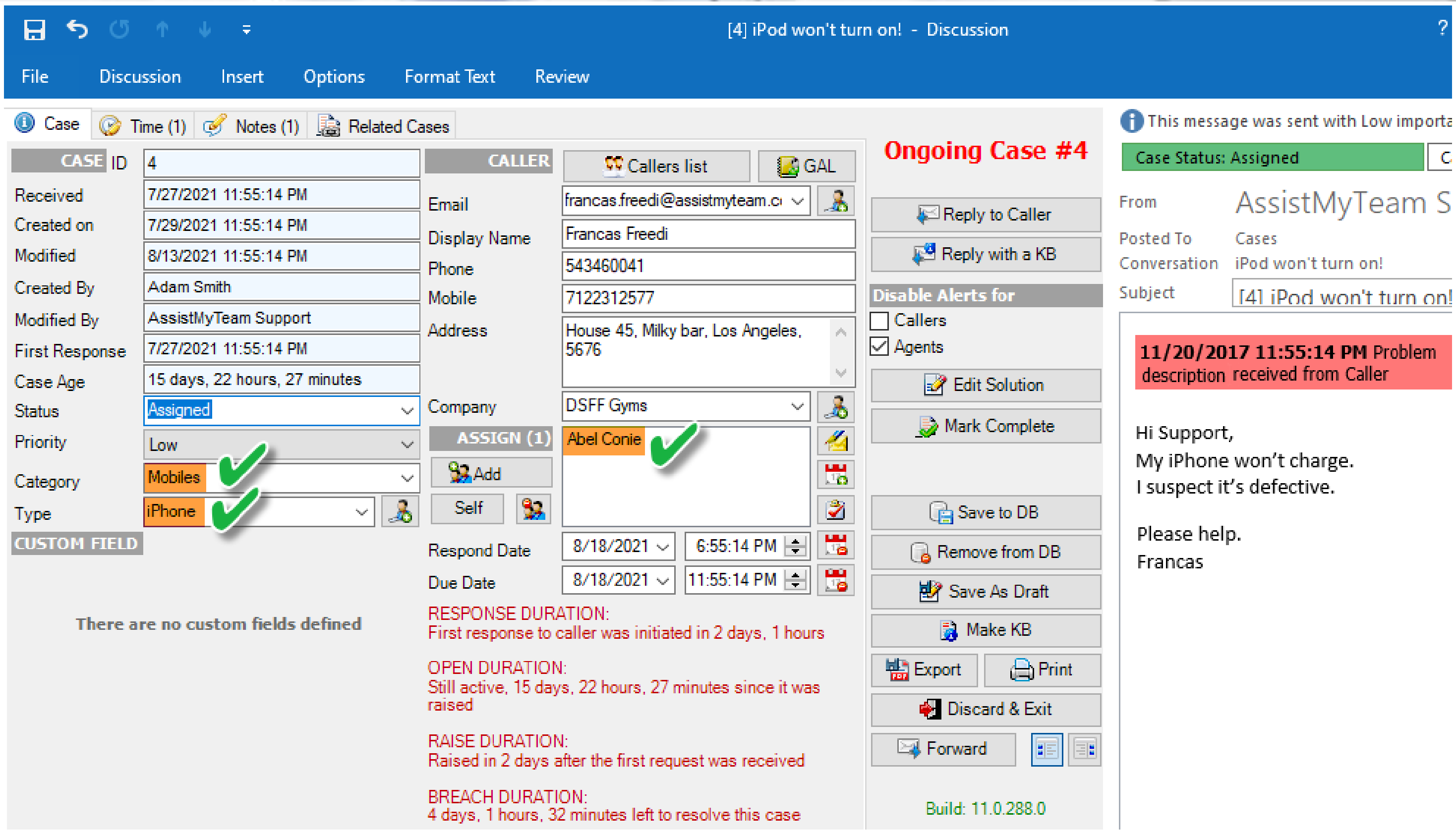
3	MacBook	Notebooks	26.00	MCBOOK	Adam Smith
4	MacBook Pro	Notebooks	26.00	MCBOOKPRO	Adrien Silva

And assuming a customer sends an email to helpdesk with problem type **'iPhone'** keyword in the subject.



When a case is raised from this email (manually or automatically), the helpdesk add-in will sense the presence of a problem type keyword (e.g., iPhone). And it's intelligent enough to auto assign the default agent associated with this problem type. This will in turn trigger a notification alert to the assigned technician as well as to the supervisors (if the specific alerts are enabled in *AssistMyTeam Helpdesk Manager > Notification Options > General Alerts* tab).



5 **Due Date for newly created cases**

Specify how the due date of newly created support cases should be assigned.

a) Assign current Date/Time – Choose this option to set the current date/time (e.g., same as when the case was created).

b) Schedule – Choose this option to schedule ahead it. You need to input the number of hours or days that will be scheduled ahead for the due date of the new case.

c) Assign the current or next available Working Hour – Choose this option to dynamically seek the next available working hour (as per helpdesk availability e.g., starting and closing hours).

d) None – Choose this option to have empty due date on the new case.

6 **Respond by date for newly created cases**

Specify how the respond by date of newly created support cases should be assigned.

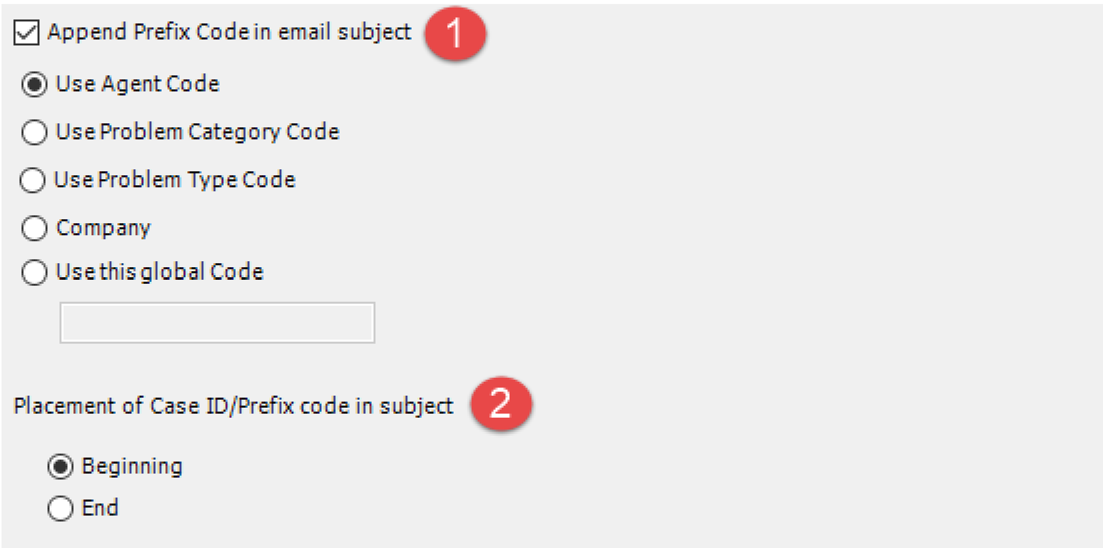
a) Assign current Date/Time – Choose this option to set the current date/time (e.g., same as when the case was created)

b) Schedule – Choose this option to schedule ahead it. You need to input the number of hours or days that will be scheduled ahead for the due date of the new case.

c) Assign the current or next available Working Hour – Choose this option to dynamically seek the next available working hour (as per helpdesk availability e.g., starting and closing hours).

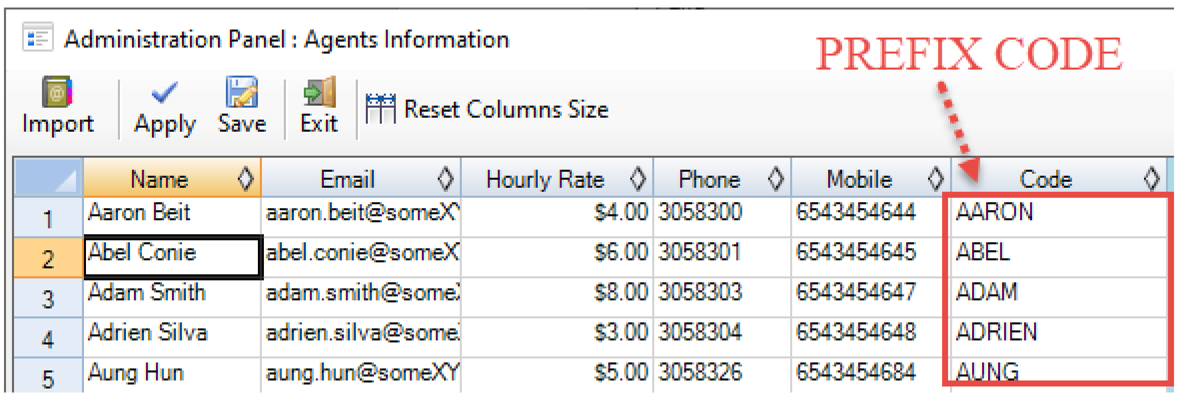
d) None – Choose this option to have empty due date on the new case.

Case ID and Prefix Code



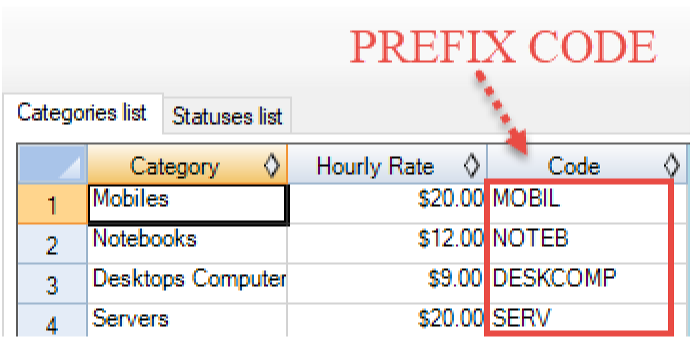
1 **Append Prefix Code in Email Subject**
Enable this option so that the helpdesk add-in will add a prefix code before the case ID (under subject field) of the case or to the outgoing emails. You can choose which prefix code to use from one of the following fields:

- **Agent Code** – You can define prefix code for each agent under *AssistMyTeam Helpdesk Manager > Agents List.*



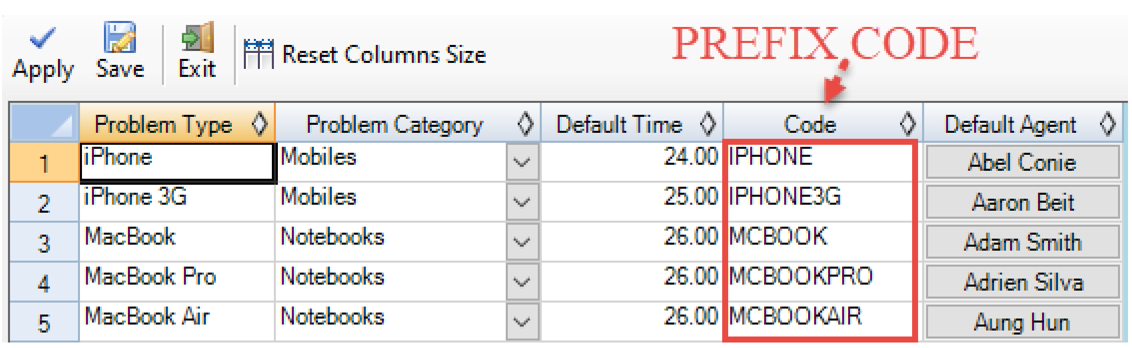
	Name	Email	Hourly Rate	Phone	Mobile	Code
1	Aaron Beit	aaron.beit@someX	$4.00	3058300	6543454644	AARON
2	Abel Conie	abel.conie@someX	$6.00	3058301	6543454645	ABEL
3	Adam Smith	adam.smith@some	$8.00	3058303	6543454647	ADAM
4	Adrien Silva	adrien.silva@some	$3.00	3058304	6543454648	ADRIEN
5	Aung Hun	aung.hun@someXY	$5.00	3058326	6543454684	AUNG

- **Problem Category Code** – You can define prefix code for each category under *AssistMyTeam Helpdesk Manager > Problems List > Categories List* tab.



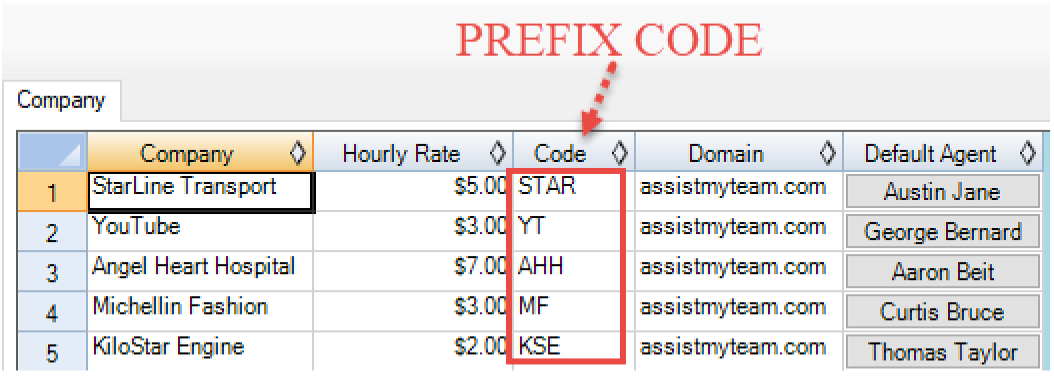
	Category	Hourly Rate	Code
1	Mobiles	$20.00	MOBIL
2	Notebooks	$12.00	NOTEB
3	Desktops Computer	$9.00	DESKCOMP
4	Servers	$20.00	SERV

- **Problem Type Code** – You can define prefix code for each problem type under *AssistMyTeam Helpdesk Manager > Problems List.*



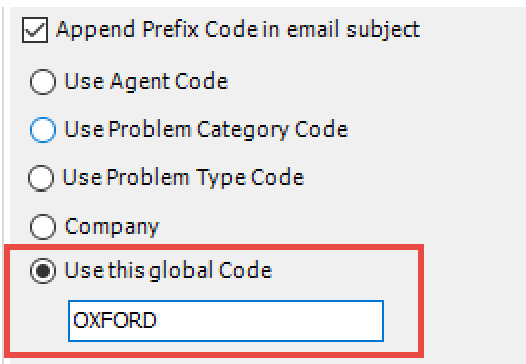
	Problem Type	Problem Category	Default Time	Code	Default Agent
1	iPhone	Mobiles	24.00	IPHONE	Abel Conie
2	iPhone 3G	Mobiles	25.00	IPHONE3G	Aaron Beit
3	MacBook	Notebooks	26.00	MCBOOK	Adam Smith
4	MacBook Pro	Notebooks	26.00	MCBOOKPRO	Adrien Silva
5	MacBook Air	Notebooks	26.00	MCBOOKAIR	Aung Hun

- **Company Code** – You can define prefix code for each company under *AssistMyTeam Helpdesk Manager > Callers List > Company* tab.

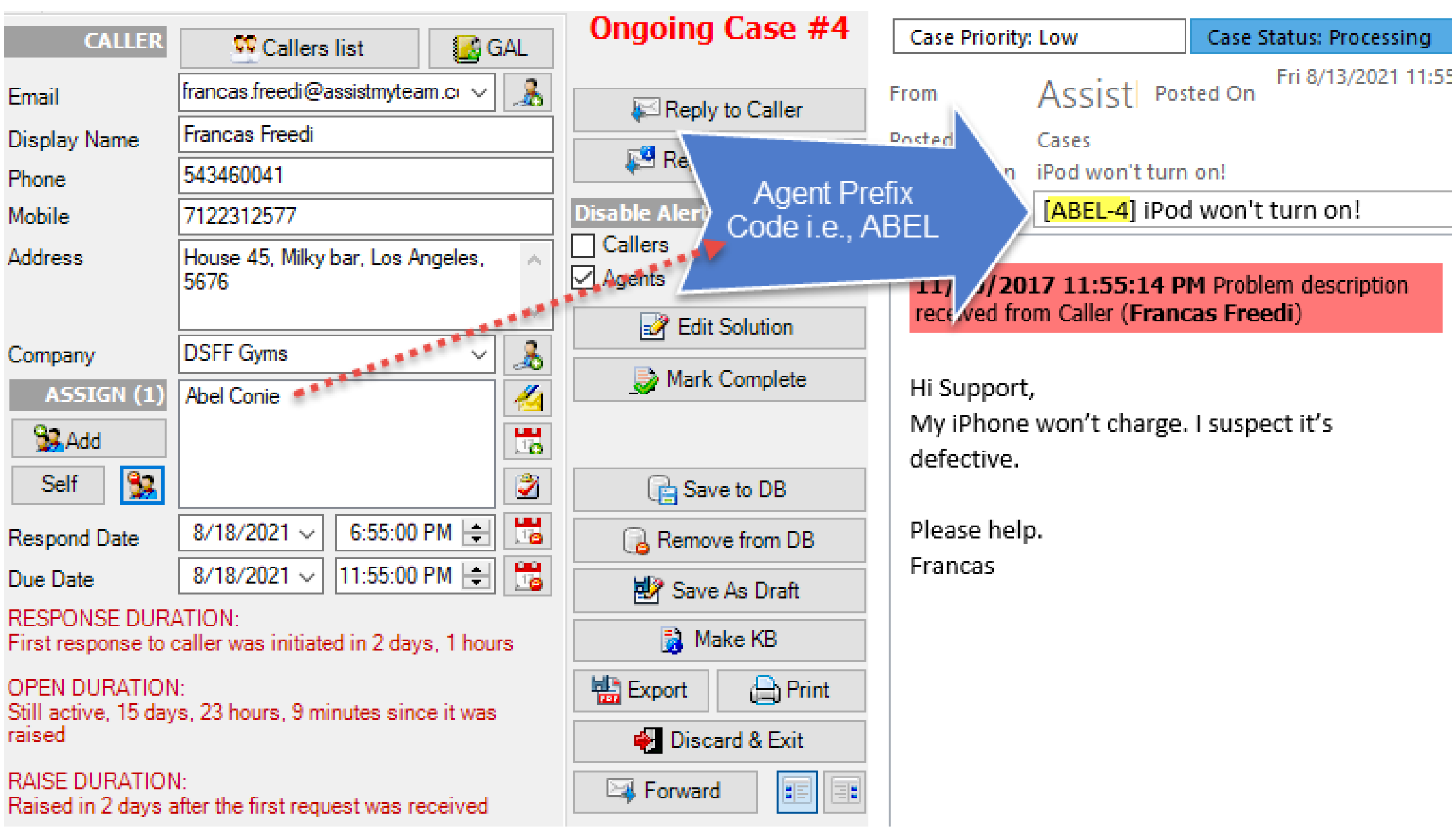


	Company	Hourly Rate	Code	Domain	Default Agent
1	StarLine Transport	$5.00	STAR	assistmyteam.com	Austin Jane
2	YouTube	$3.00	YT	assistmyteam.com	George Bernard
3	Angel Heart Hospital	$7.00	AHH	assistmyteam.com	Aaron Beit
4	Michellin Fashion	$3.00	MF	assistmyteam.com	Curtis Bruce
5	KiloStar Engine	$2.00	KSE	assistmyteam.com	Thomas Taylor

- **Global Code** – You can define one global, fixed prefix code that will be used in all cases and email communications within the helpdesk.



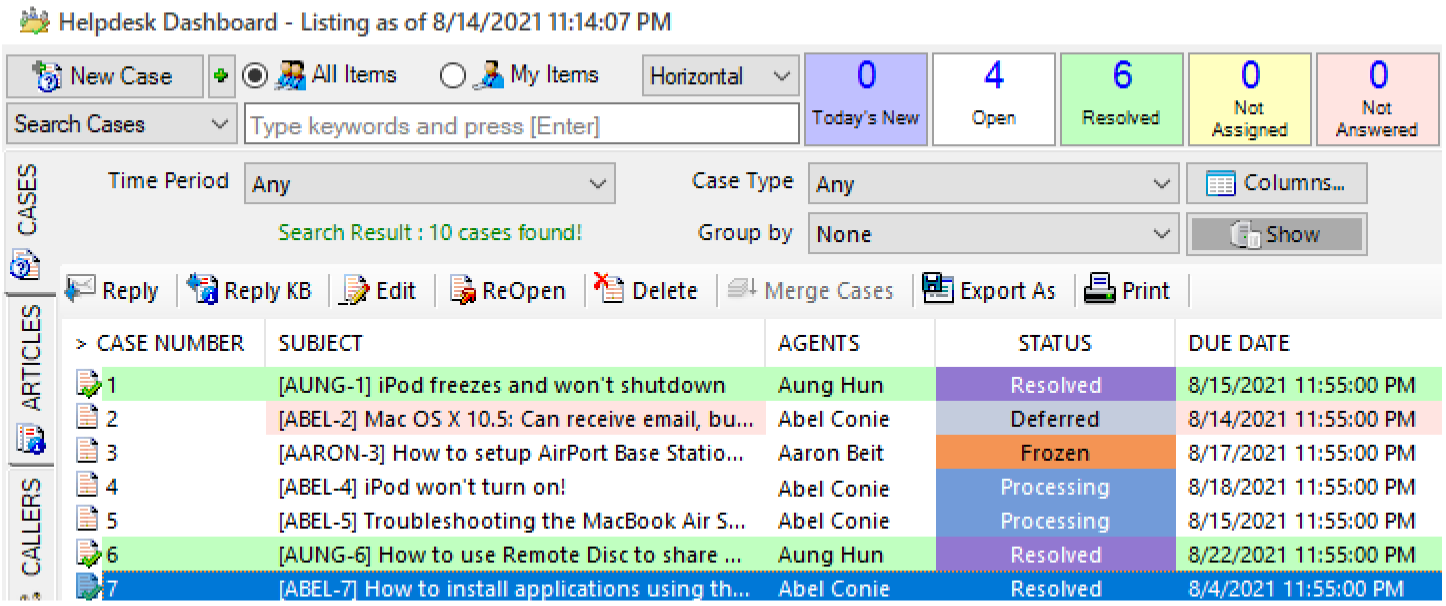
For instance, you can choose **'Use Agent Code'** so that the helpdesk add-in can insert the prefix code of the assigned agent in the subject of the case and emails.



Alternatively, you can also define a global fixed code that would be prefixed in all the cases. By default, adding prefix code before the case ID in the subject of the email is disabled.

What are the benefits? By adding a prefix code to the subject of the case or on outgoing emails, when callers reply back, the received emails would contain the same prefix code. And this in turn may aid in quick recognition of the particular case, by simply looking at the prefix code.

For instance, if the agent code is set as the prefix code, you can easily recognize who is responsible for attending to the reply or the case. Moreover, it is easy to differentiate important emails from the less trivial ones.



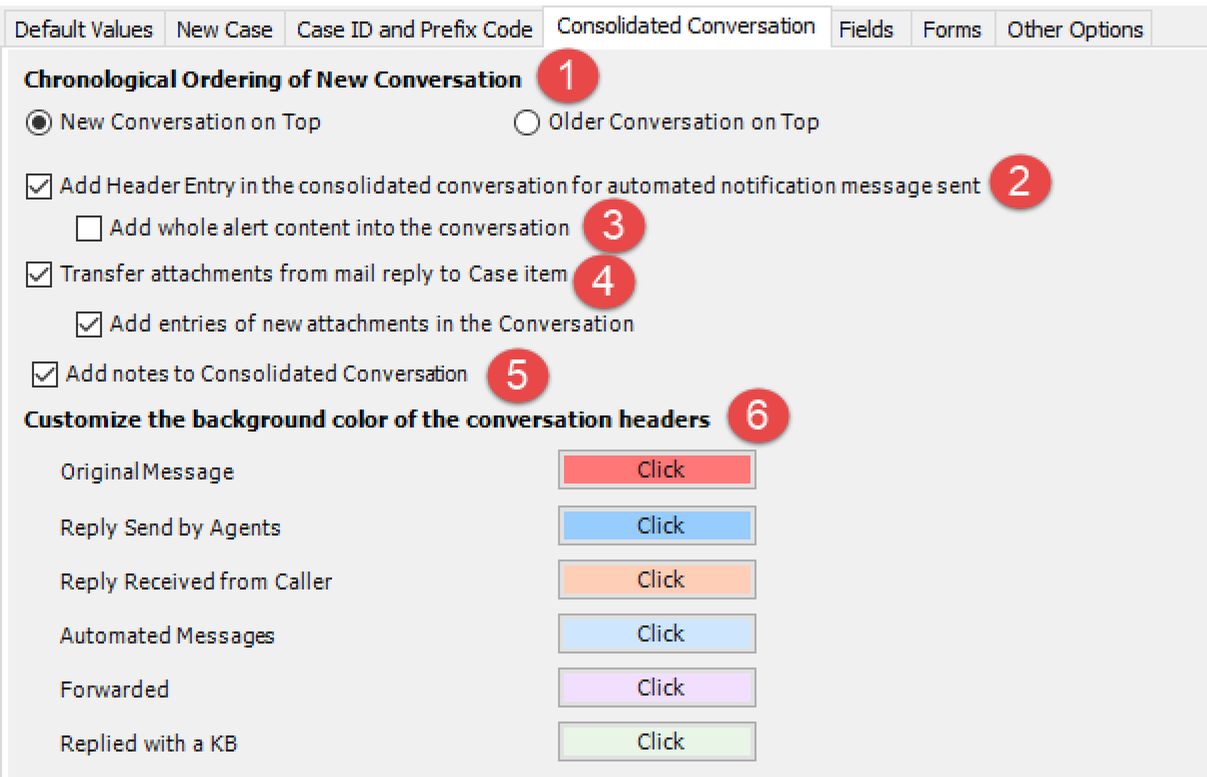
2 **Placement of Case ID/Prefix code in subject**

Choose if the prefix/code (enclosed in square brackets) is to be placed at the **beginning** or **end** of the subject line. By default, the prefix code/ID is placed the beginning of the subject.

Consolidated Conversation and Emails Threading

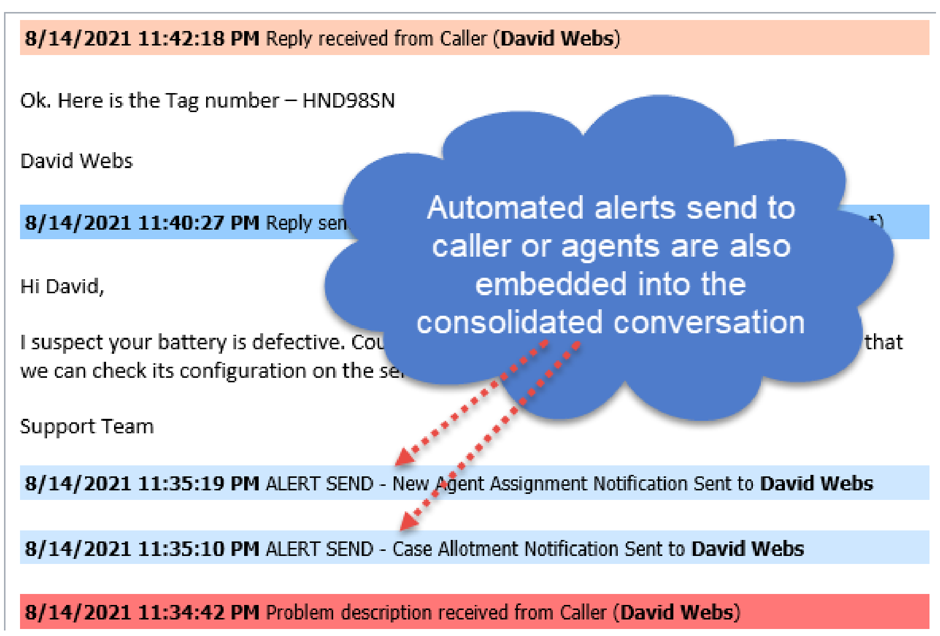
Most support cases cannot be closed within a single e-mail and response. Feedback from the caller and suggestions from the respective agents often occur over multiple request-response emails. Moreover, different members from the support teams may provide resolutions during the course of the request.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

With the conversation threading feature, AssistMyTeam Helpdesk captures the complete course of the conversation 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 to a support request 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 agent to quickly glimpse through the thread and get a complete overview on the responses in chronological order and resolution applied to the particular support request, something which is hard to extract from viewing multiple email responses.



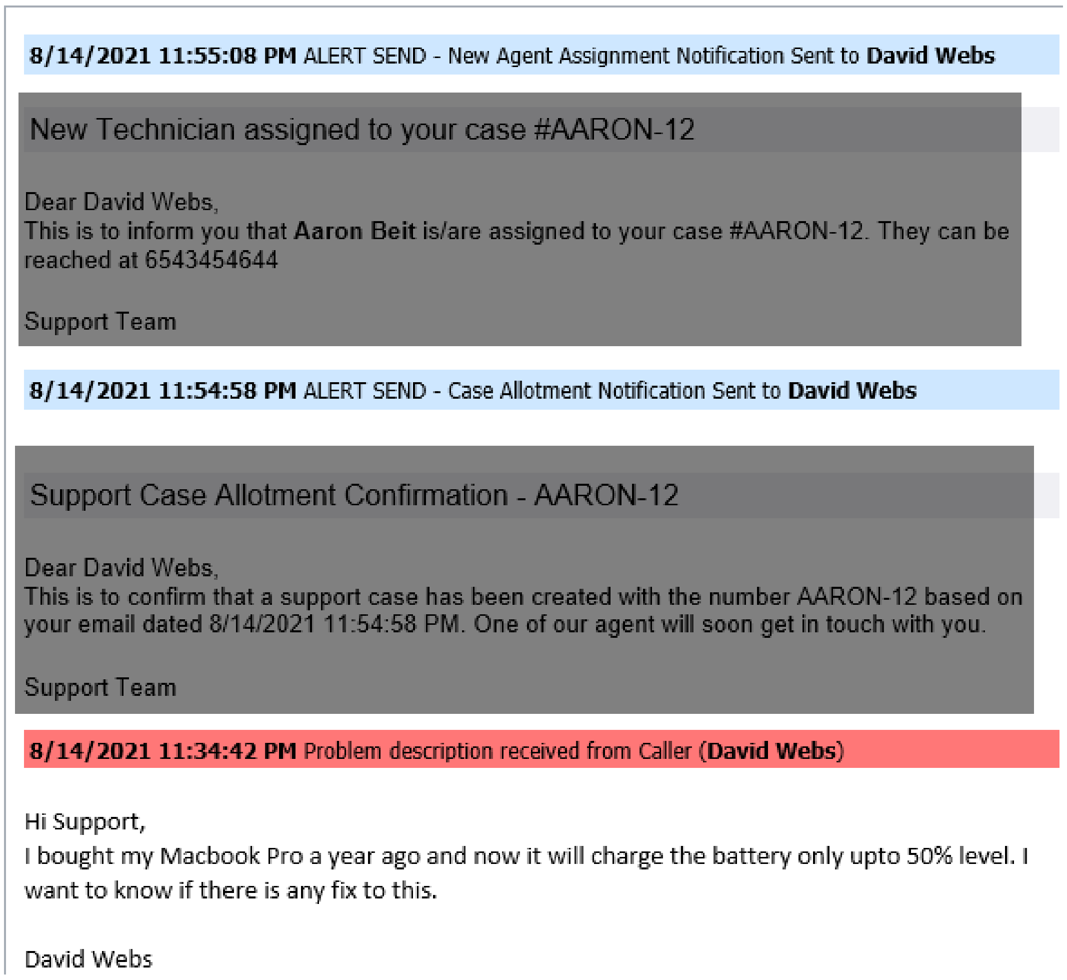
1. Choose if new conversation to the case is to be added on top or below of existing consolidated conversations.

2. **Add header entry in the consolidated conversation for automated notification sent**
   Enable this option to embed a snippet entry of the automated notification or alert sent to the caller or agents by the helpdesk add-in.



3 **Add whole alert content into the conversation**

Enabling this would insert the whole content of the automatic alert email (that was triggered and send to the caller or agents from the helpdesk).



8/14/2021 11:55:08 PM ALERT SEND - New Agent Assignment Notification Sent to **David Webs**

New Technician assigned to your case #AARON-12

Dear David Webs,
This is to inform you that **Aaron Beit** is/are assigned to your case #AARON-12. They can be reached at 6543454644

Support Team

8/14/2021 11:54:58 PM ALERT SEND - Case Allotment Notification Sent to **David Webs**

Support Case Allotment Confirmation - AARON-12

Dear David Webs,
This is to confirm that a support case has been created with the number AARON-12 based on your email dated 8/14/2021 11:54:58 PM. One of our agent will soon get in touch with you.

Support Team

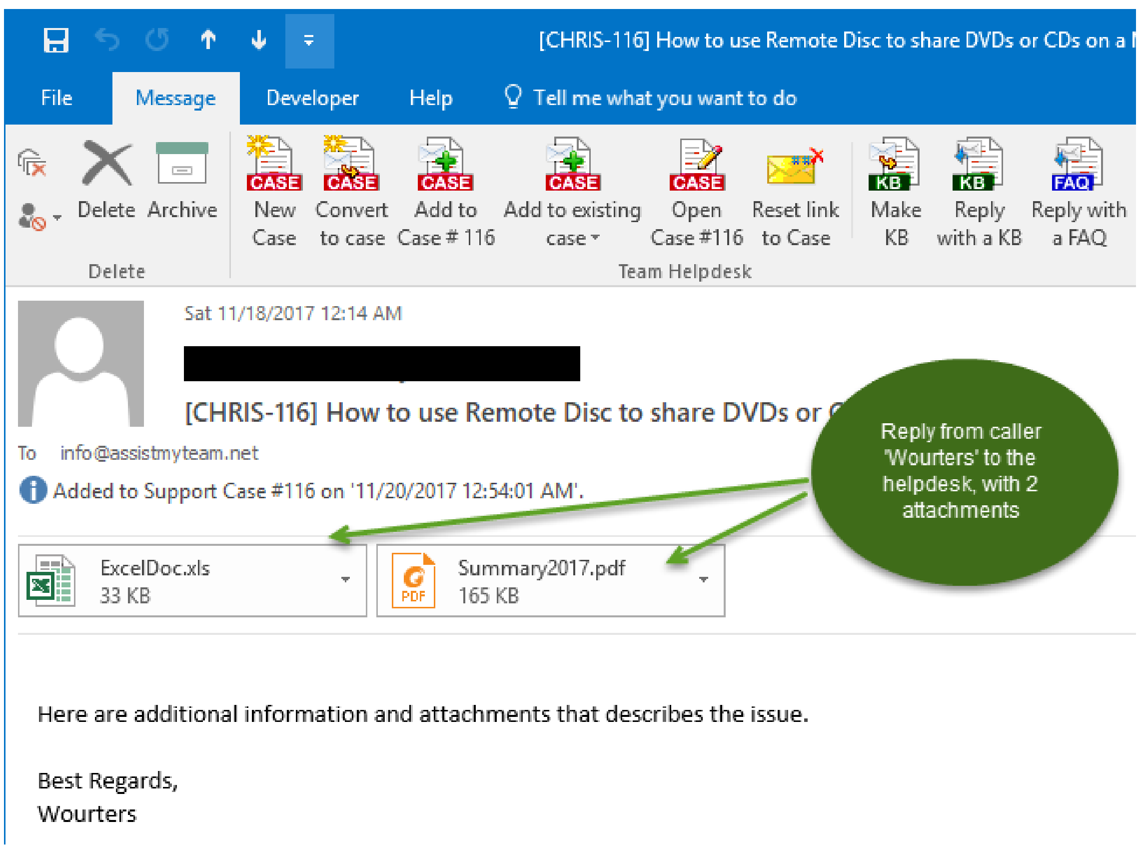
8/14/2021 11:34:42 PM Problem description received from Caller (**David Webs**)

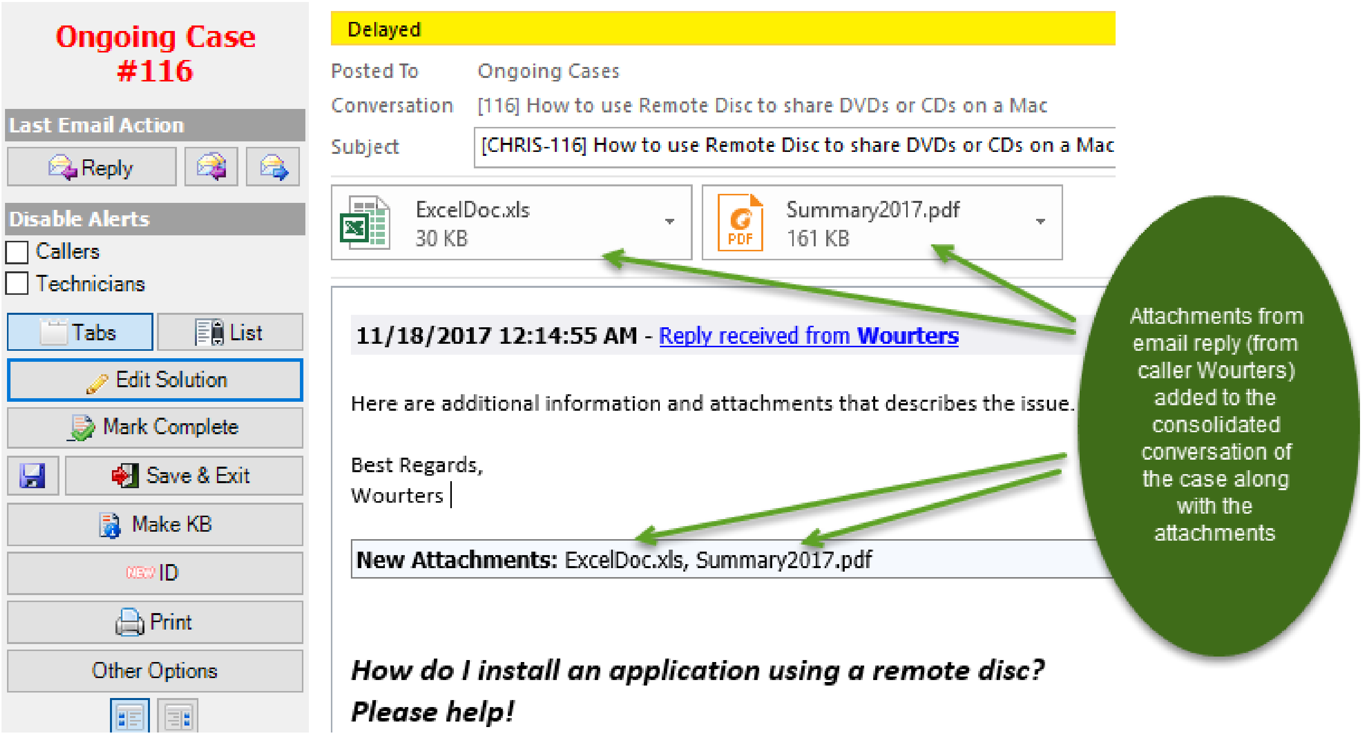
Hi Support,
I bought my Macbook Pro a year ago and now it will charge the battery only upto 50% level. I want to know if there is any fix to this.

David Webs

4 **Transfer attachments from email reply to case item**

When processing incoming replies (that contains attachments) from caller, enable this option so that the helpdesk add-in will also automatically add these attachments from email to the case item.

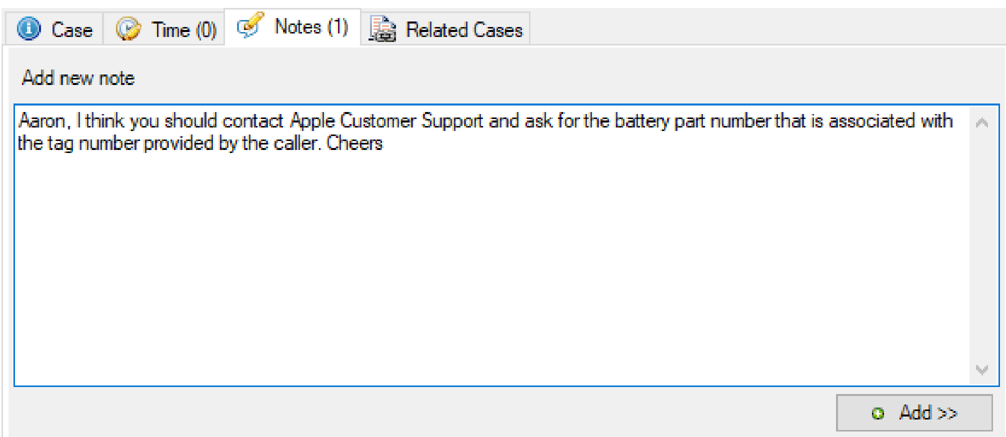


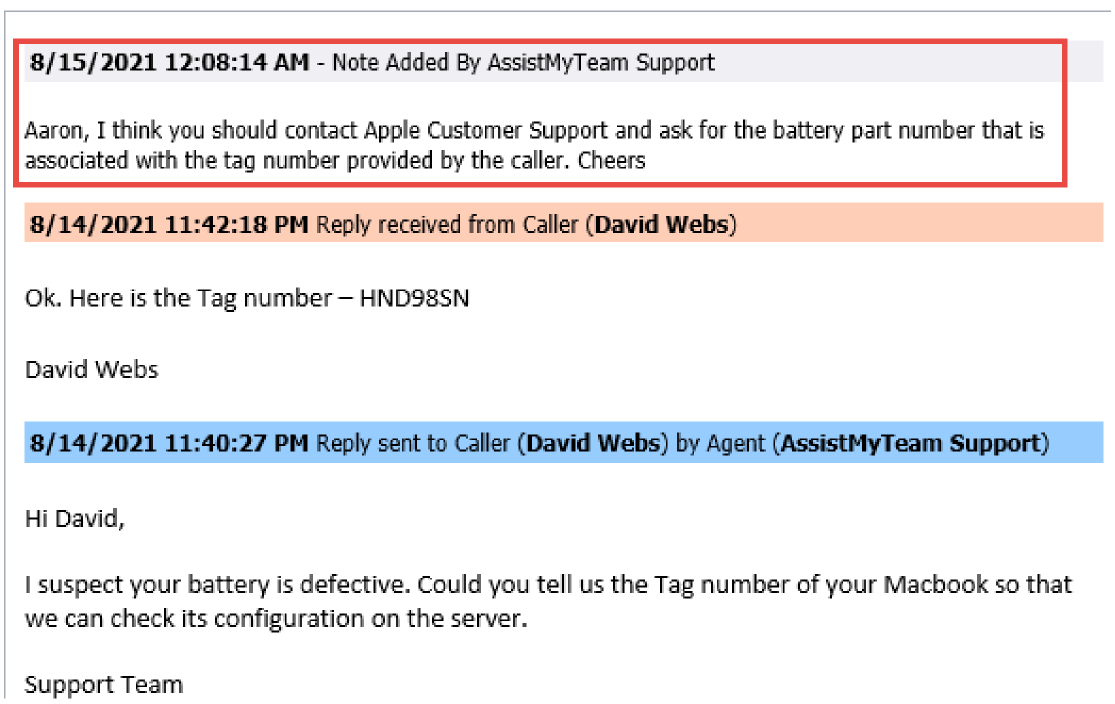


Optionally, you can enable the option '**Add entries of new attachments in the conversation**', so that a new snippet entry on the attachment names (which were added to the case) are included to the conversation.

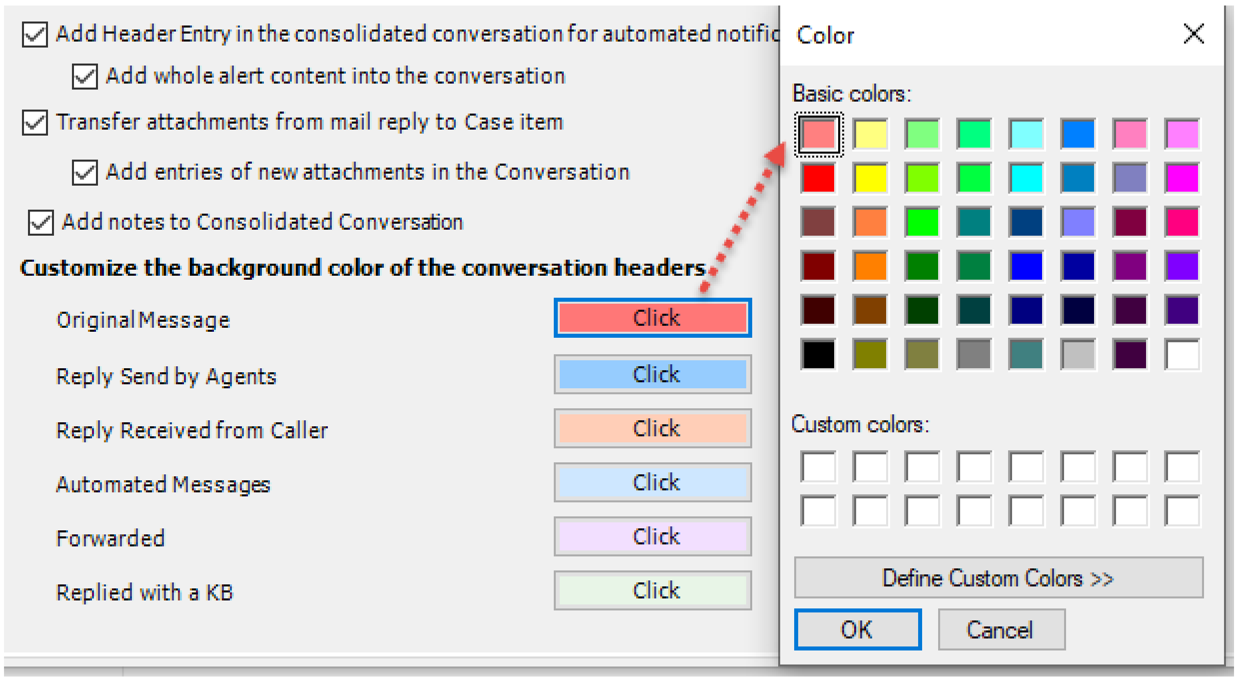
5 **Add notes to consolidated conversation**

Enabling this would add a copy of the private note to the case conversation as well.

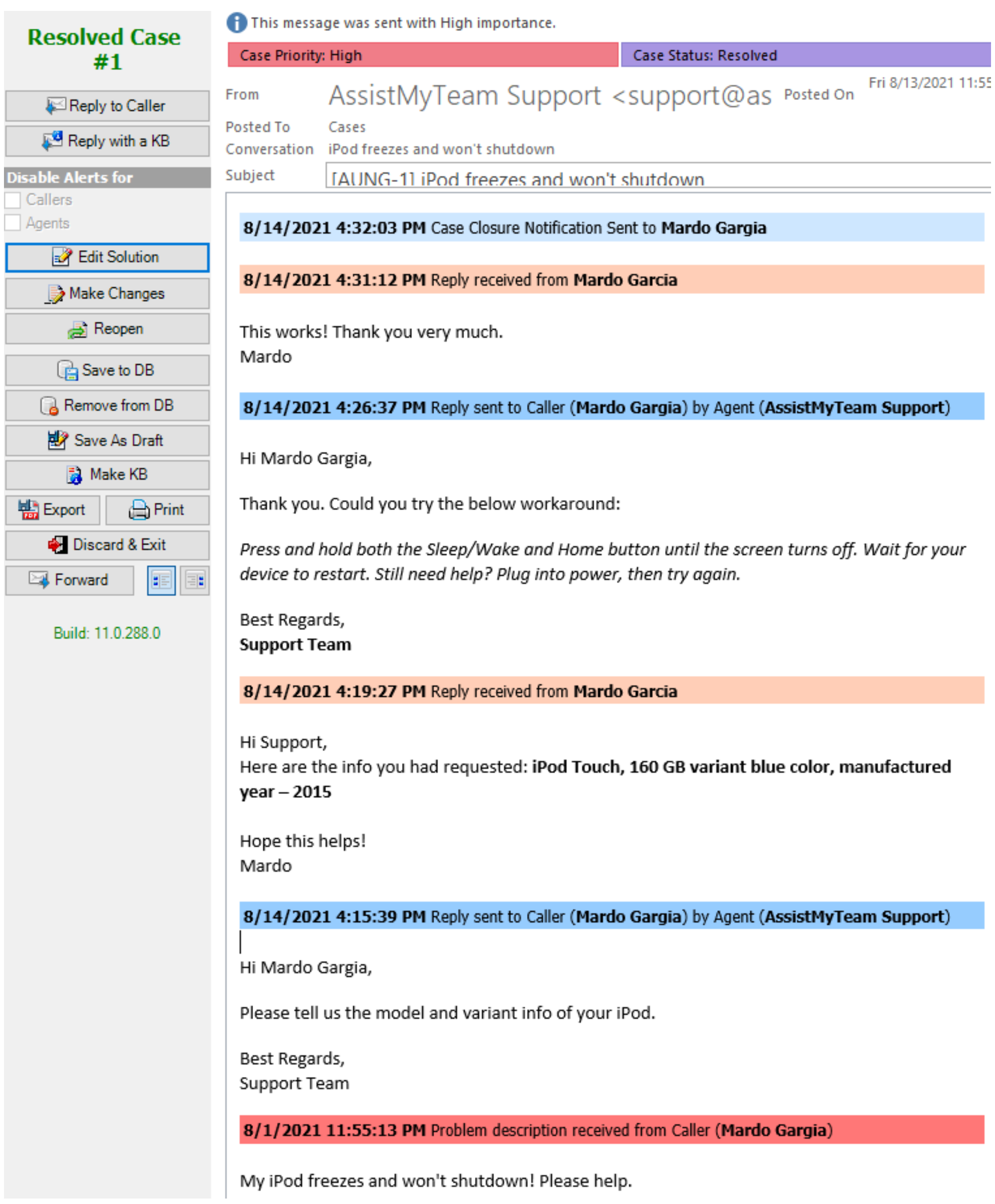




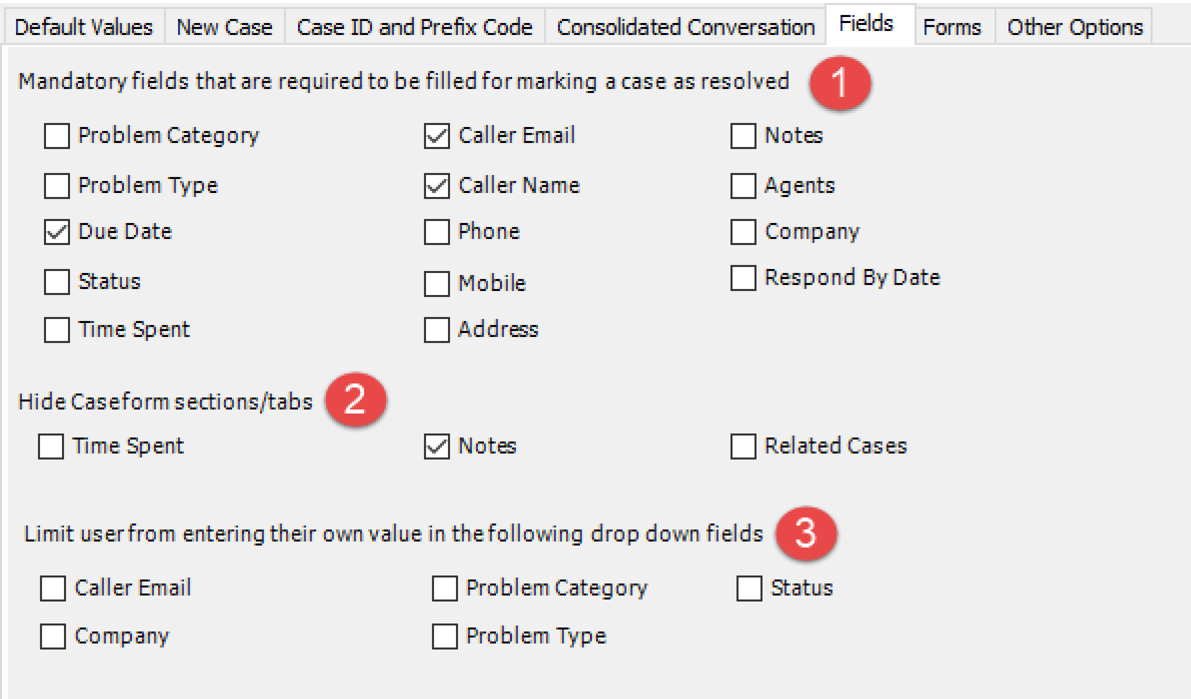
6 Customize the background color of the conversation headers



You can set your own backcolor of different conversation headers that are embedded into the consolidated conversation section. This could be helpful to distinguish between multiple types of conversation such as those replied by the caller, or those responses send by the agent to the callers, or those conversations that were forwarded or added as private notes by other agents or managers etc.

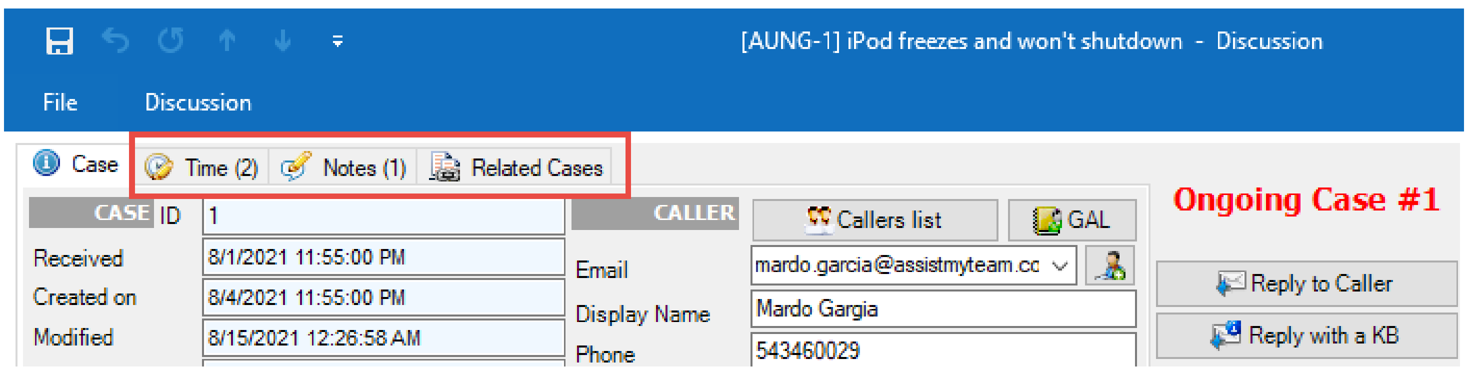


Helpdesk Fields Workflow

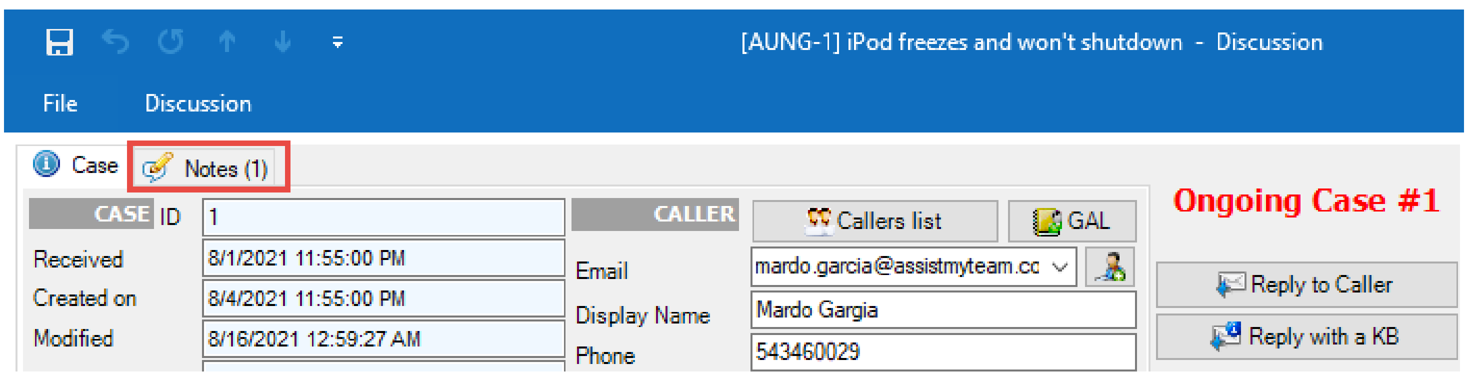


1 **Mandatory fields that are required to be filled out for marking a case as resolved**
Enable this option to set certain helpdesk fields as mandatory to be filled, before the case can be marked resolved or complete. And select the fields that are to be made mandatory.
<u>**NOTE:**</u> Mandatory fields will be shown in red labels in the case form.

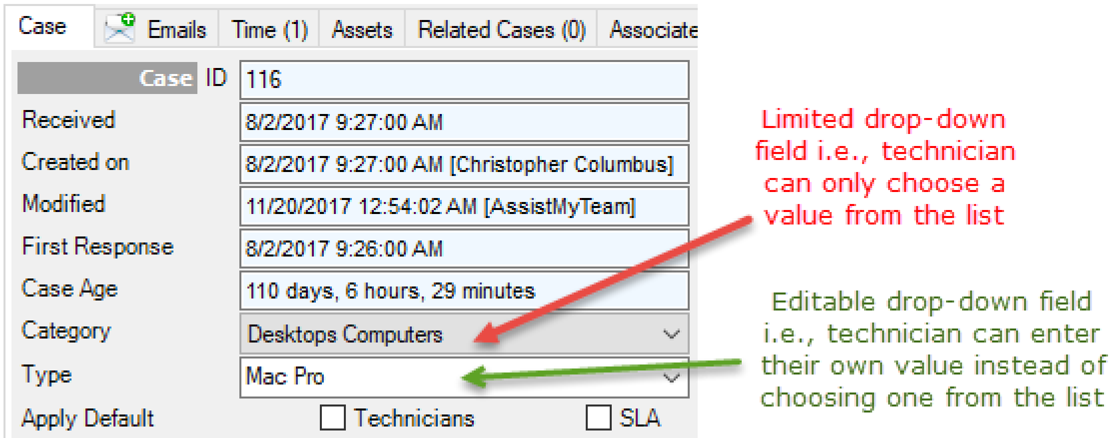
2 **Hide Case form sections/tabs**
Helpdesk manager can choose to hide certain portion of the Outlook case form, such as the Time Spent, Notes section etc. if these sections or tabs won't be used at all. And this setting would affect all agents. For example, below is how the case form appears when none of the sections/tabs are hidden.



And below is the case form with 'Related Cases' and 'Time Spent' tabs are hidden.

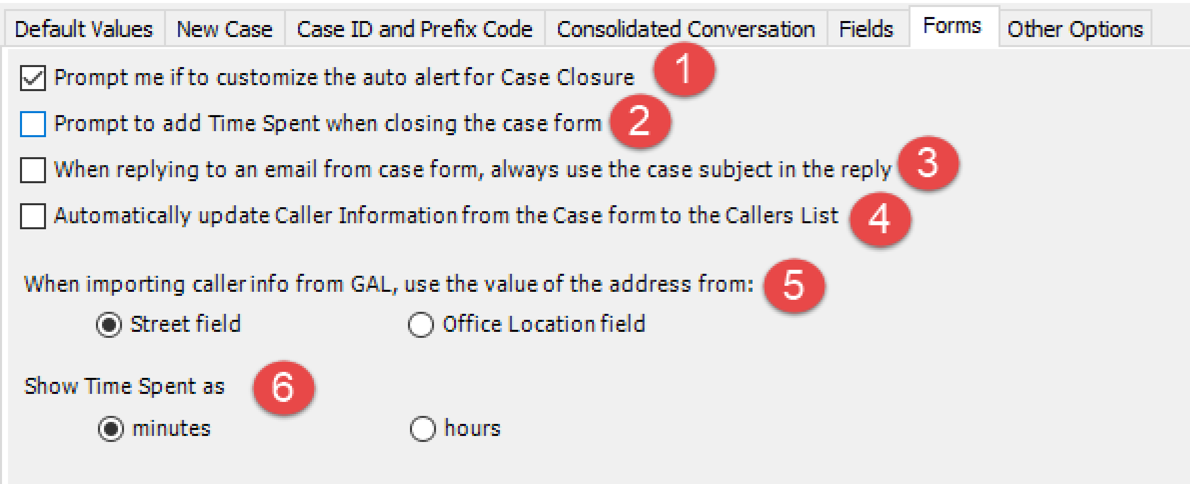


3 **Limit user from entering their own value in the following drop-down fields**
Check the particular drop-down fields that you only want technicians to be able to choose from the drop-down and prevent entering their own. By default, agents can input their own value against the available drop-down list. To prevent non-existent value from being tagged to the case for these drop-down fields, check the corresponding field.

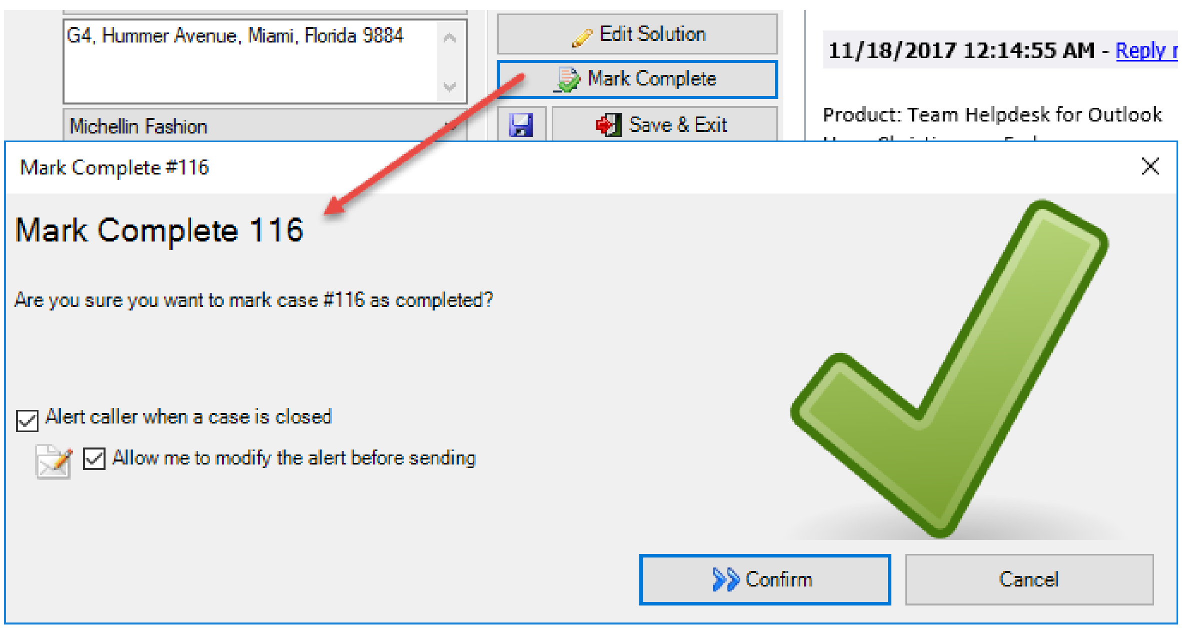


NOTE: drop-down fields with limitation in case form are greyed out, where ones without limitation are not (white back-color)

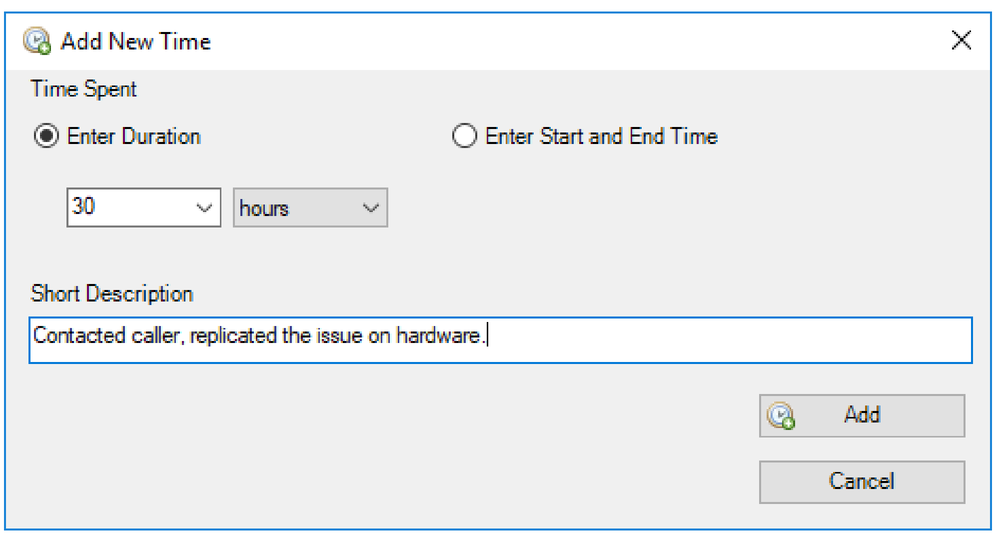
Case Form



1 **Prompt me if to customize the auto alert for Case Closure**
Enable this option to force the helpdesk add-in to prompt the technicians for confirmation on case closure as well as to choose if to send the auto notification to the caller. If yes, the technician can choose to customize the notification (say, if further information specific to that ticket or caller are needed to be added before it is finally sent).



2 **Prompt to add Time Spent when closing the case form**
Enable this option to force the helpdesk add-in to prompt the technician to add their time spent data to the case when the form window is closed.

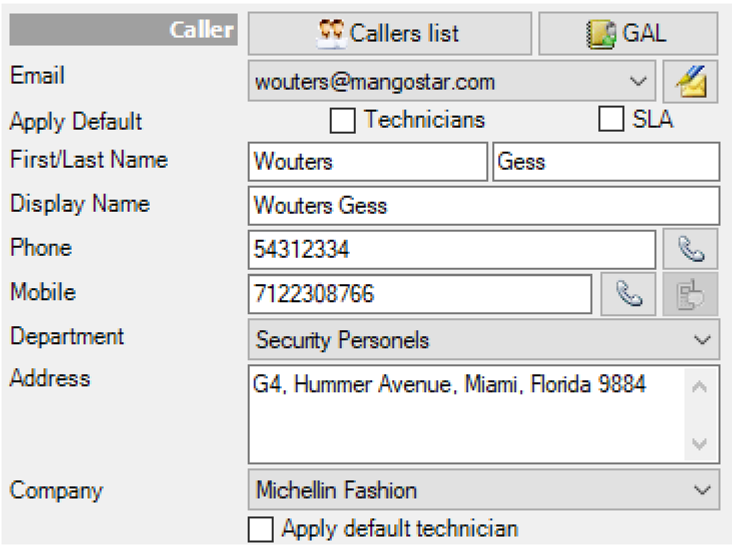


When replying to an email from case form, always use the case subject in the reply

When enabled, the add-in will use the subject of the case in the email reply made to the caller.

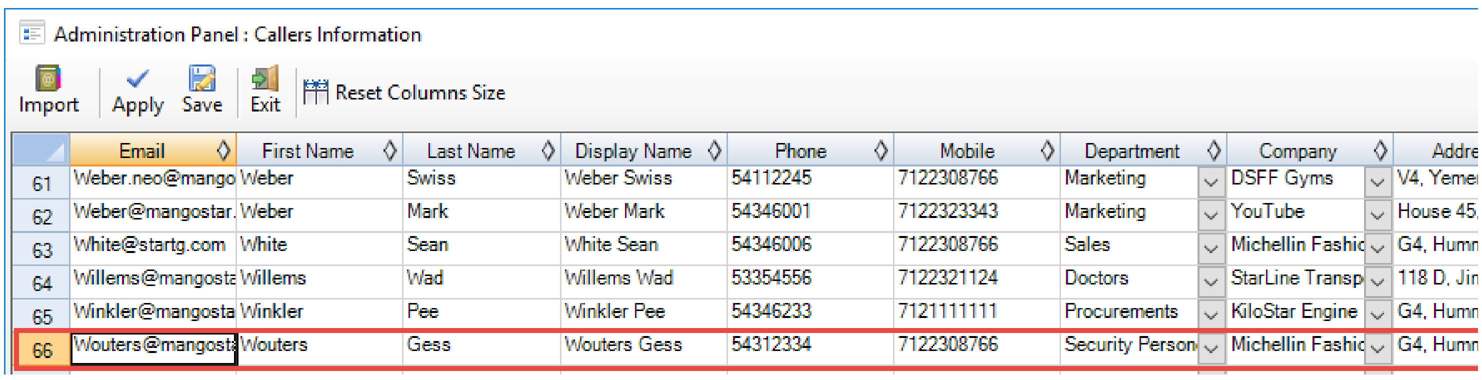
Automatically update caller information from the case form to the Callers List

If enabled, the helpdesk add-in will track the changes in the caller information in the cases and if required, will make the necessary update back to the *AssistMyTeam Helpdesk Manager > Callers List* if any of the caller information was changed or added in the case.



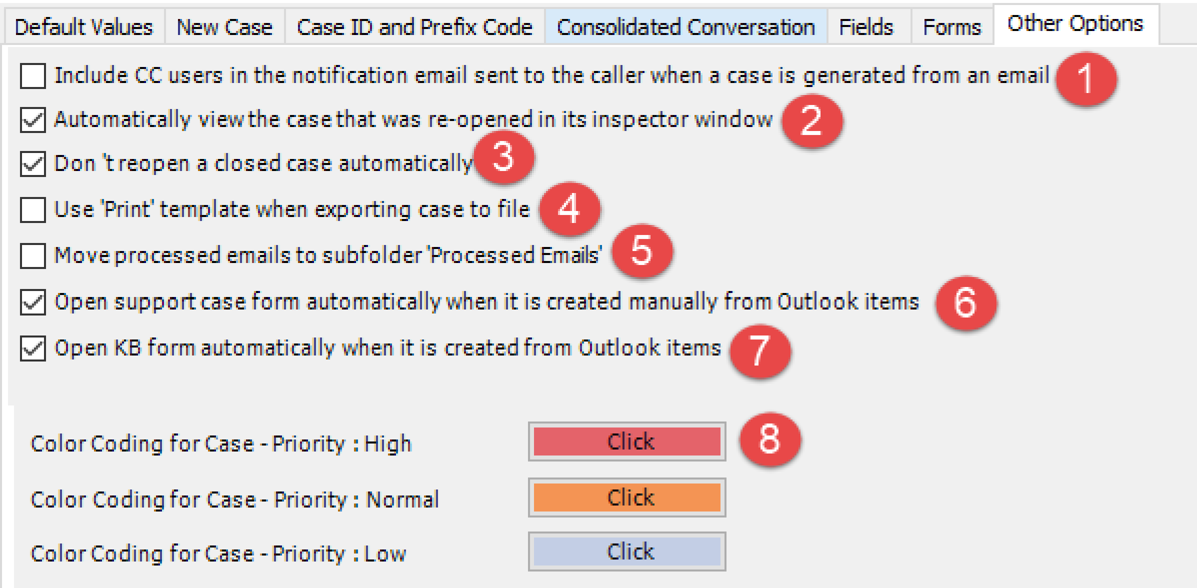
For example, when a caller seeks support request the first time, the helpdesk may only have the caller email and name in the callers list database.

However, after iteration of communication or calls, if the caller information was updated to the case to include say, phone number, mobile number, address, company etc., the helpdesk add-in will automatically track and update the caller information back to the Callers list database for future use.



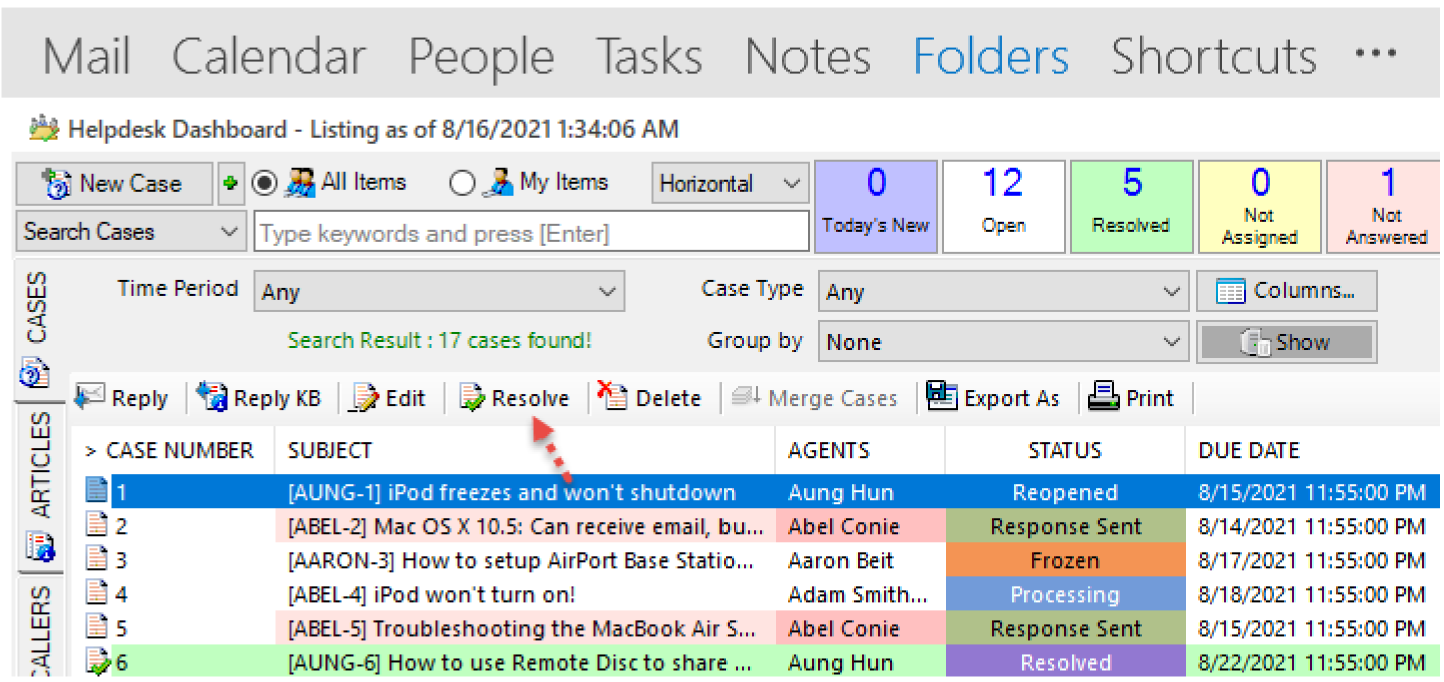
	Email	First Name	Last Name	Display Name	Phone	Mobile	Department	Company	Addre
61	Weber.neo@mango	Weber	Swiss	Weber Swiss	54112245	7122308766	Marketing	DSFF Gyms	V4, Yeme
62	Weber@mangostar.	Weber	Mark	Weber Mark	54346001	7122323343	Marketing	YouTube	House 45,
63	White@startg.com	White	Sean	White Sean	54346006	7122308766	Sales	Michellin Fashic	G4, Humn
64	Willems@mangosta	Willems	Wad	Willems Wad	53354556	7122321124	Doctors	StarLine Transp	118 D, Jin
65	Winkler@mangosta	Winkler	Pee	Winkler Pee	54346233	7121111111	Procurements	KiloStar Engine	G4, Humn
66	Wouters@mangost	Wouters	Gess	Wouters Gess	54312334	7122308766	Security Person	Michellin Fashic	G4, Humn

Other Case Options



1 **Include CC users in the notification email sent to the caller when a case is generated from an email**
If enabled, when a support case is first generated from an email, helpdesk add-in will send out the case allotment notification email to the caller, as well as to the recipients specified in the CC field of the original email. The benefit is to allow anyone (on the CC line) to respond to the ticket thread without creating a new ticket.

2 **Automatically view the case that was re-opened in its inspector window**
Enable this option to force helpdesk add-in to display the case in its window when it is re-opened from the completed state. This is applicable and handy if you had re-opened the cases from the dashboard panel located in the Outlook explorer window.

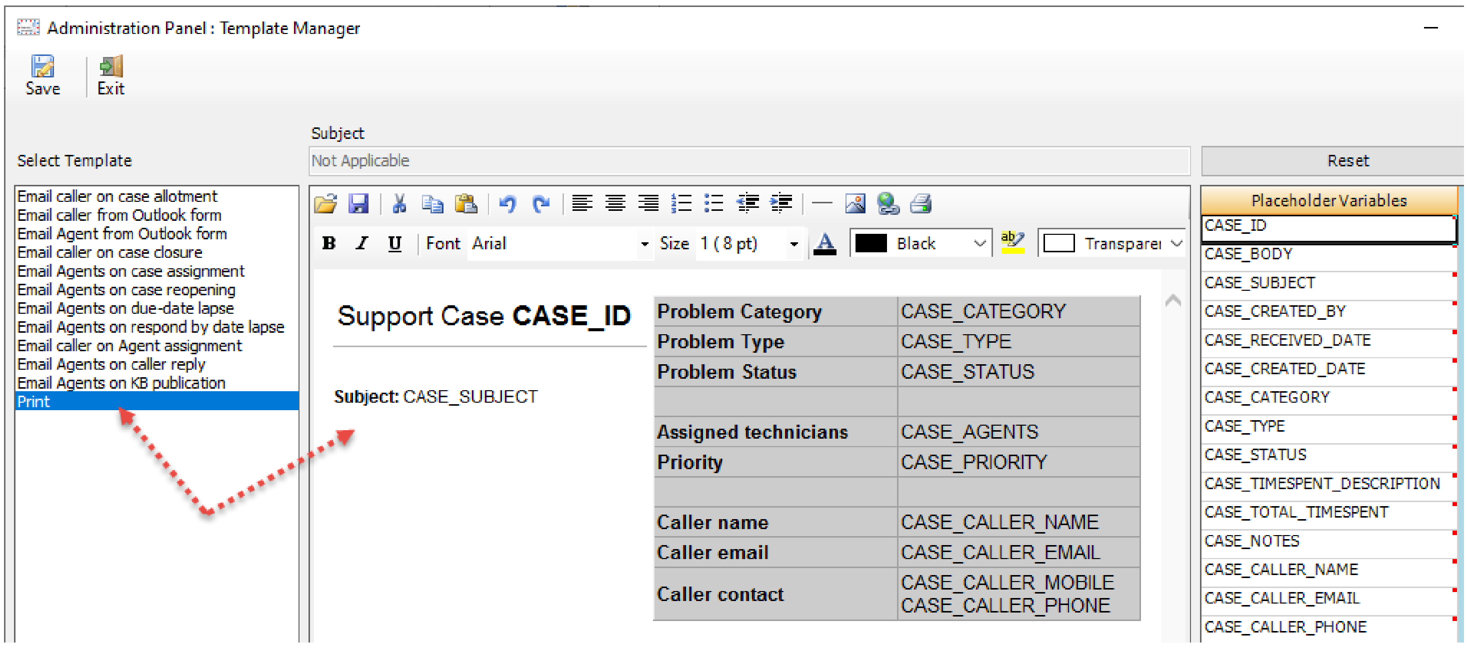


3 **Don't reopen a closed case automatically**
There may be situations where the caller just replied to say, thank you for the support. But that may trigger a reopening of the case with unnecessary overhead. Enable this option to prevent the helpdesk add-in from automatically re-opening a case from its completed state when a response from the caller is received by the helpdesk after the completion of the case. This will also prevent the add-in from adding redundant and irrelevant information to the closed case.

__NOTE:__ If enabled, closed cases won't reopen automatically when a customer sends a reply after the case is closed. This way it is very easy to miss the reply of the customer because the case stays in closed issues. Technicians would have to manually re-open the case (if they deem fit) after analyzing the response from the caller i.e., if the caller just replied to say, 'Thank you for the support', you can ignore the escalation.

4 **Use 'Print' template when exporting case to file**

By default, the add-in will export the case to file using the Outlook message layout. If you want to customize the content and formatting of the case before printing, you can enable this option so that add-in uses the 'Print' template available under Helpdesk Manager > Templates Manager.



You can control what case data are included in the files by customizing the '**Print**' template. 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.

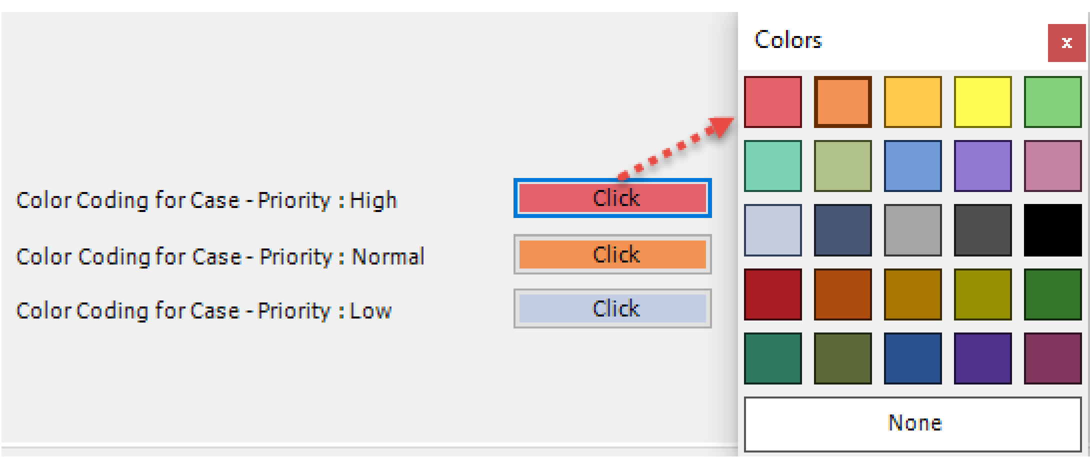
5 **Moved Processed emails to subfolder 'Processed Emails'**

By default, when a case is raised from an email or when a reply is added and updated to the case, the email is kept intact in its original folder location. But if you want such processed emails to be moved to another folder location, enable this option. Doing so, would move the emails to a subfolder 'Processed Emails' just under the parent folder.

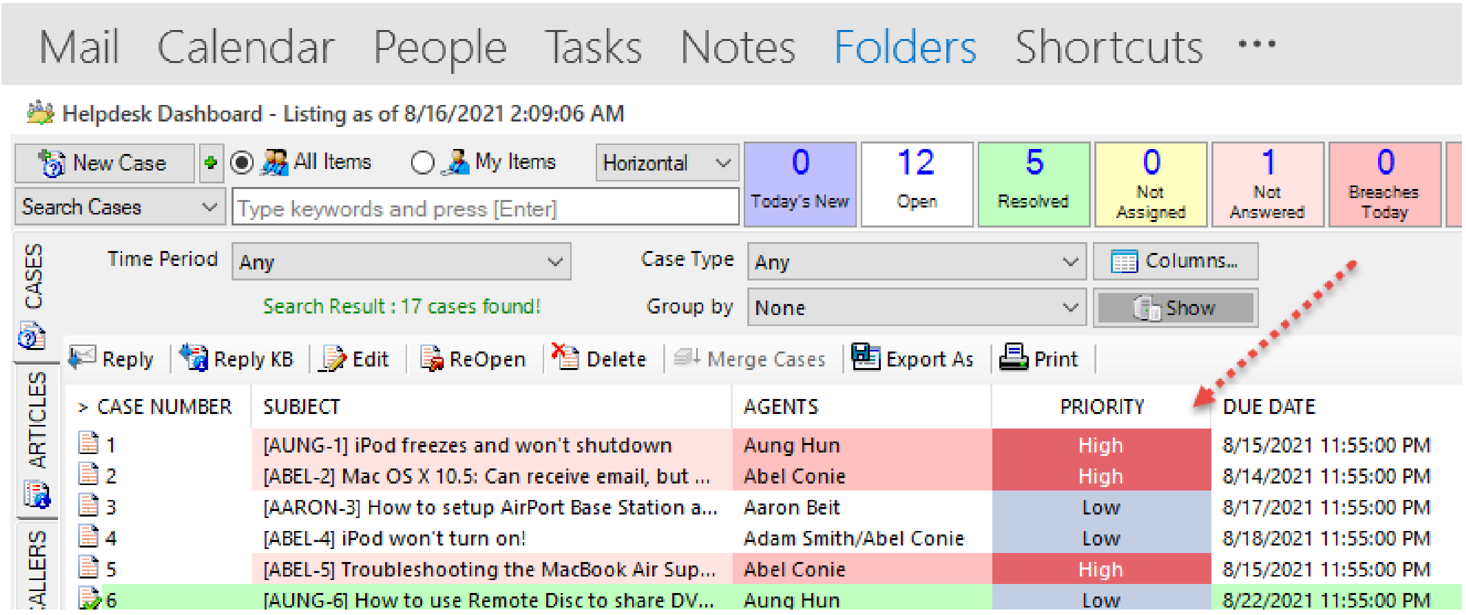
6 **Open Support Case form automatically when it is generated from other Outlook items** - Enable this option to display/open the inspector window of the support case just created. This is only applicable when the case is generated manually from an email or other Outlook item.

7 **Open knowledge base form automatically when it is generated from other Outlook items** - Enable this option to display/open the inspector window of the knowledge base just created.

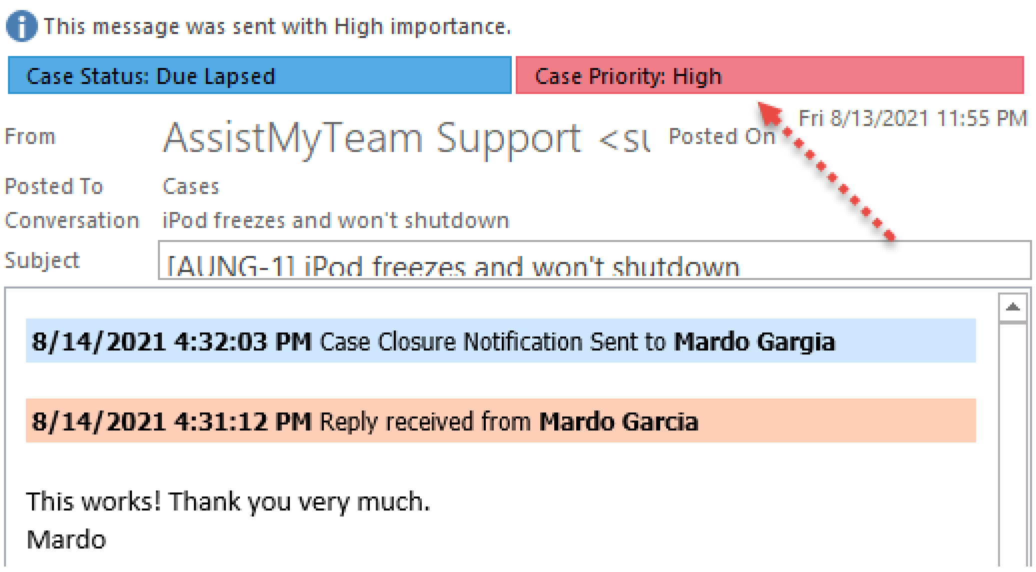
8 **Color coding for Case when priority is set**



You can choose a color for each priority - high, normal or low. And this will be reflected in the dashboard panel listing of the cases.



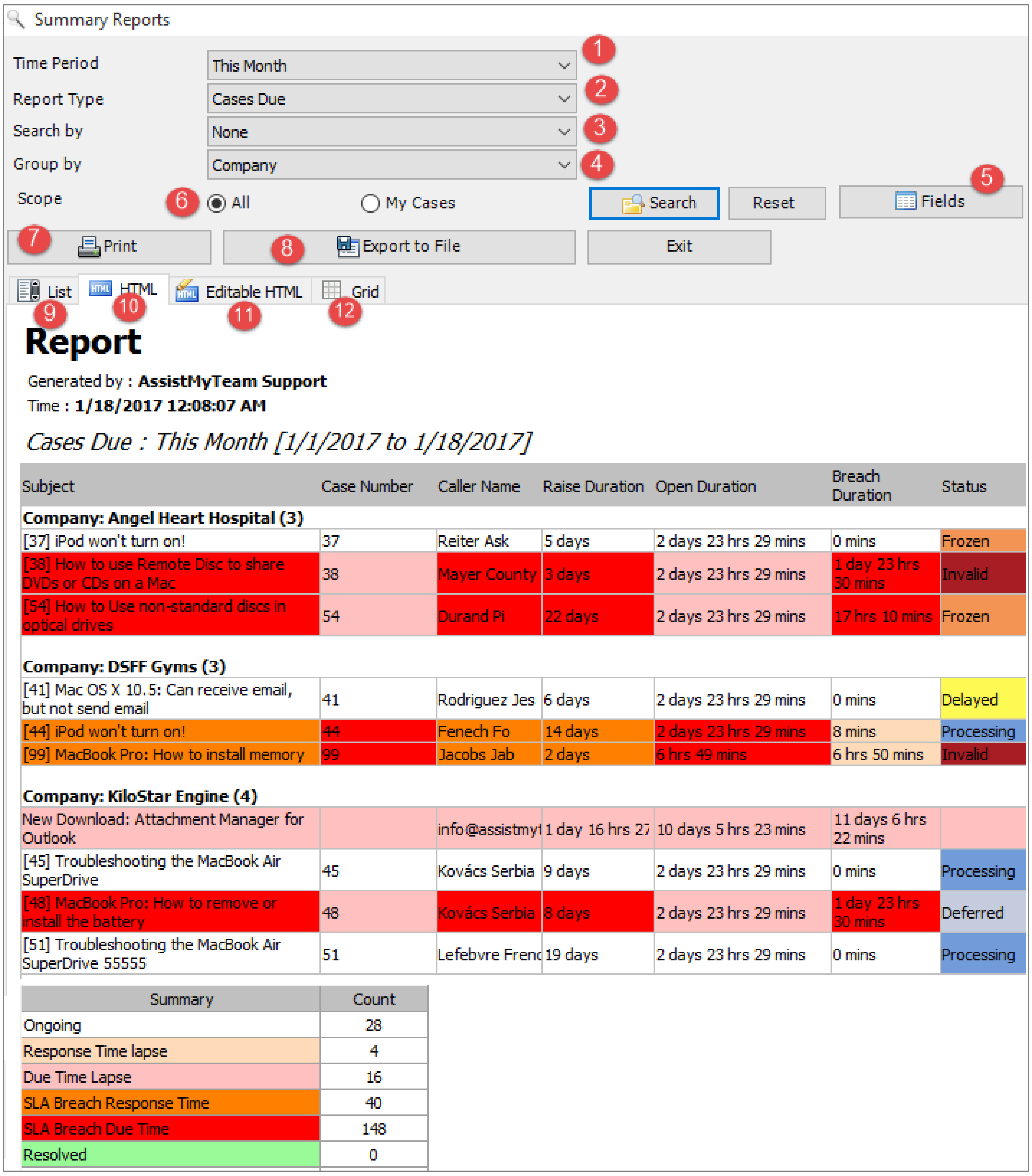
It will also show up in the case form as well.



5. 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.

There are four report view modes **- List, HTML, HTML Editable** and **Grid**. Noticed that this report tool also uses the same sets of search filters discussed in the last section.



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.

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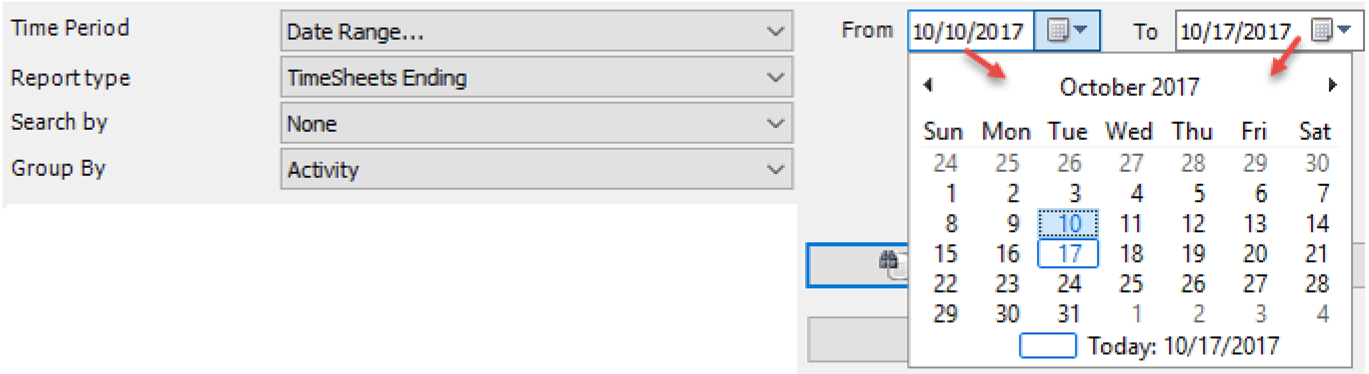
1 **Time Period:** Choose a time period from the followings under which the search will be confined: *Any, Today, Yesterday, Tomorrow, This week, Last Week, Next Week, This Month, Last Month, Next Month, This Year, Last Year, Date Range, On*

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*

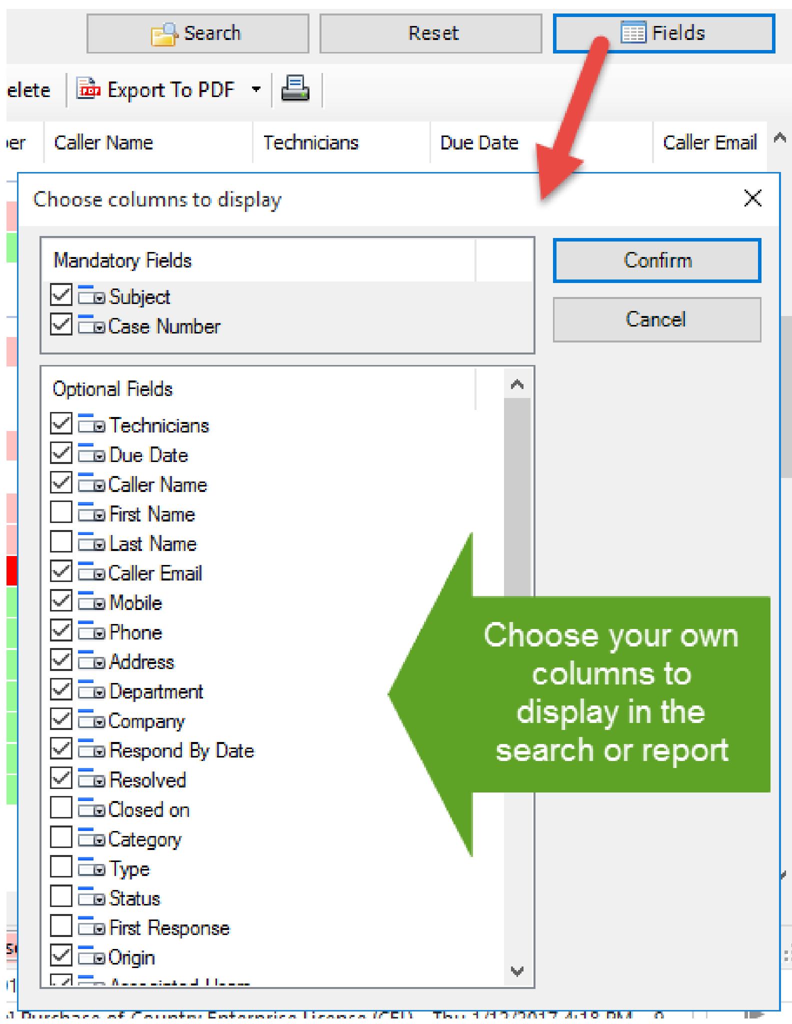
3 **Search By:** Further refine the search by filtering through keywords or using one of the following helpdesk fields: *Status, Problem, Service level, Caller, Company, Priority, Origin or Author.*

4 **Group By:** You can choose to group the cases either with: *Technicians, Status, Problem Category, Problem Type, Service level, Caller, Company, Priority, Origin 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.

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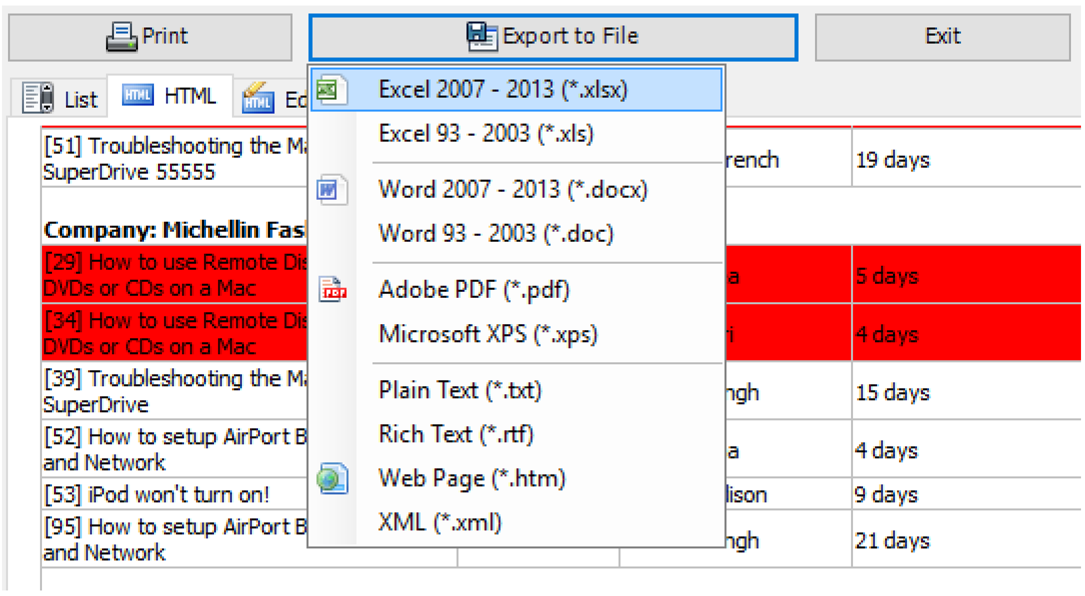
AssistMyTeam

- **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 a technician)
- **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.

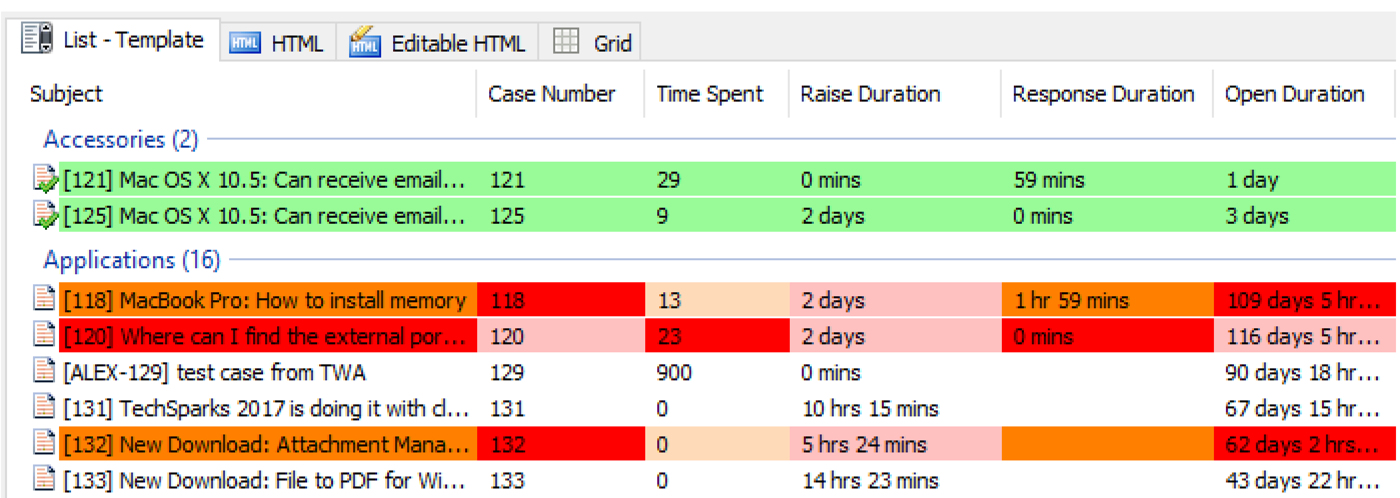
6 **Scope:** Choose if to confine the search to your assigned cases only or include all cases.

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.

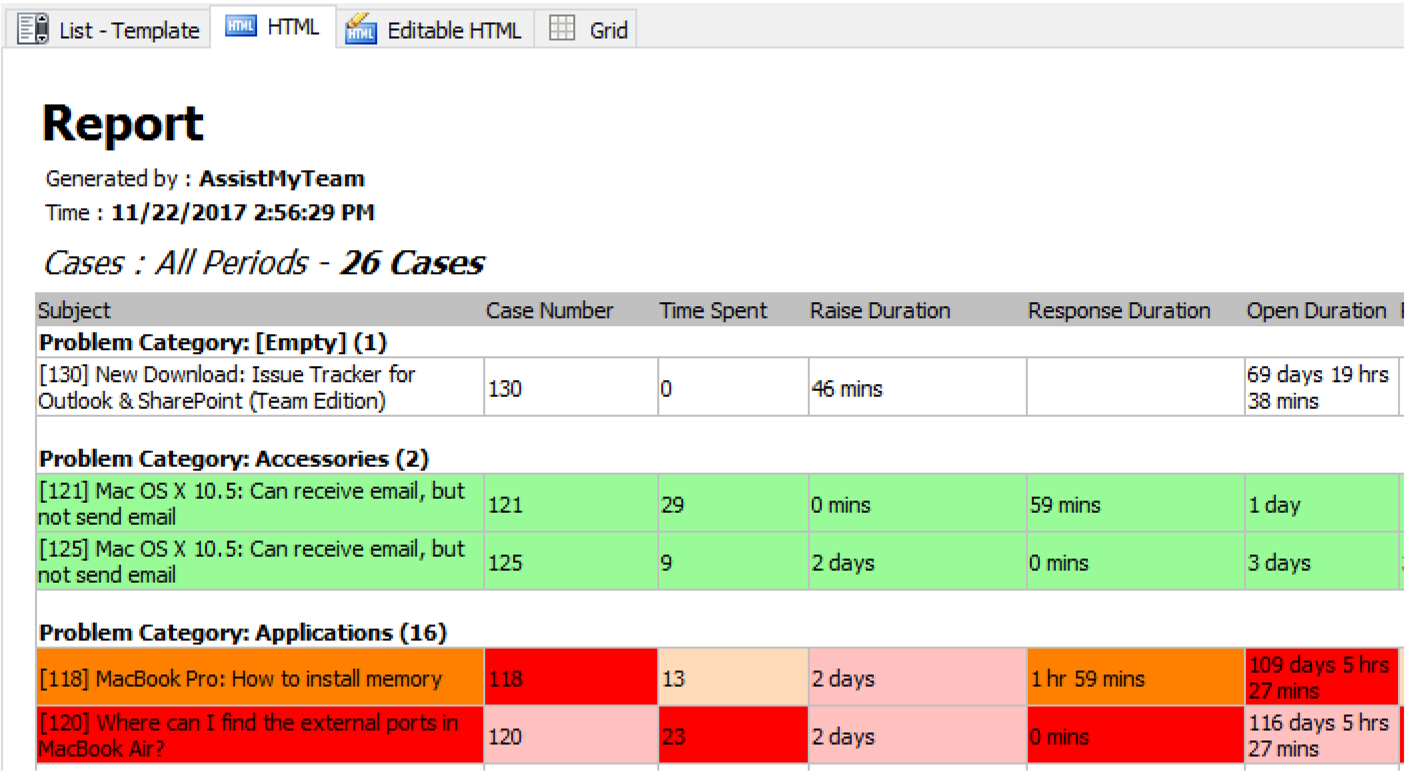
8 **Save the current report to file** – Once you get the look and feel of your report, you can then export the report to one of the many popular document formats supported such as Microsoft Excel sheets, Word documents, Adobe PDF, Rich Text or web page etc.



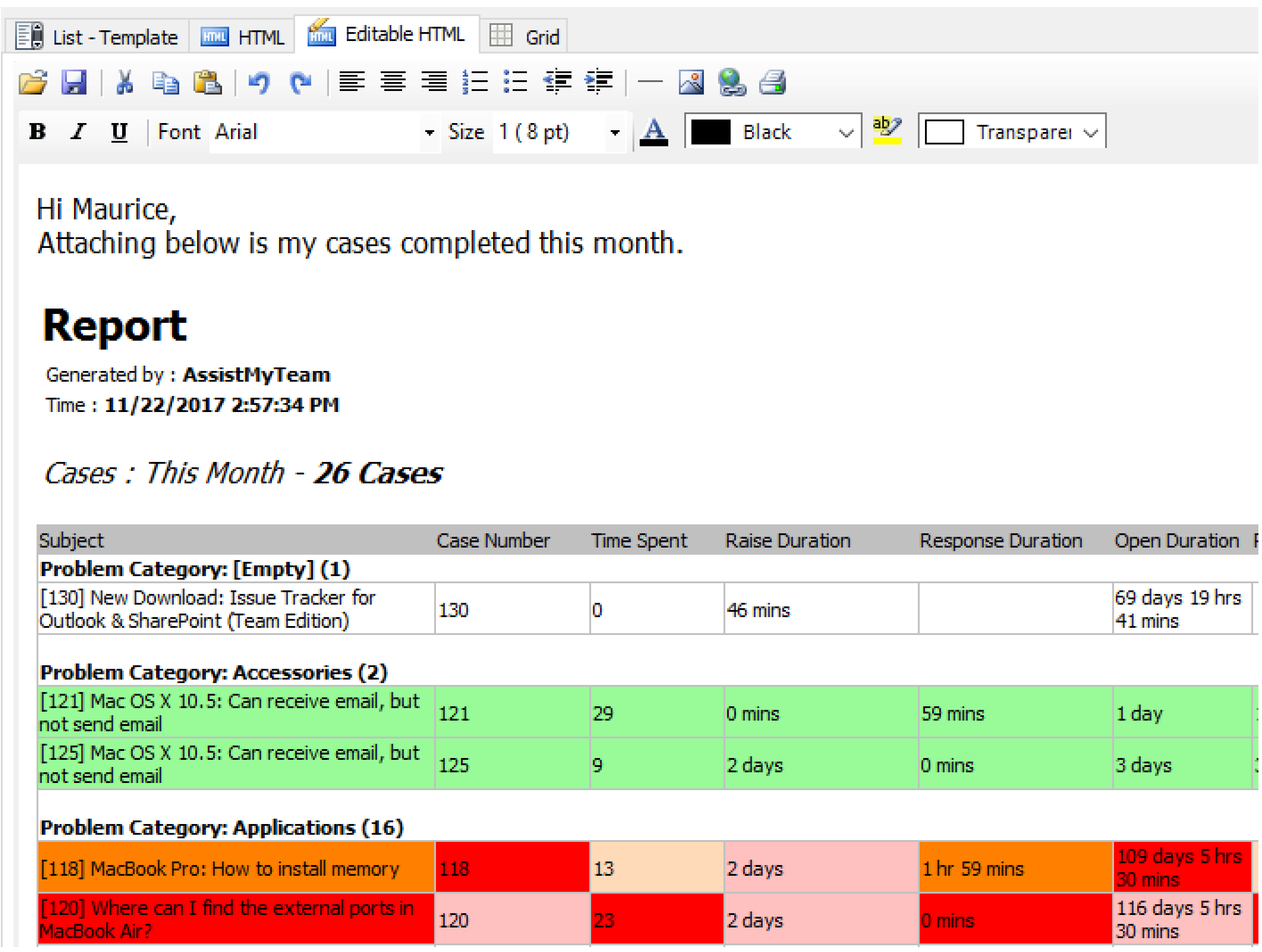
9 **List report view mode –** This act like a template to the other three report modes. For finer control over the output of report, you can choose which fields (including custom fields) are to be included in the report. You can sort the cases by clicking at the column headers, as well as also re-arrange 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.



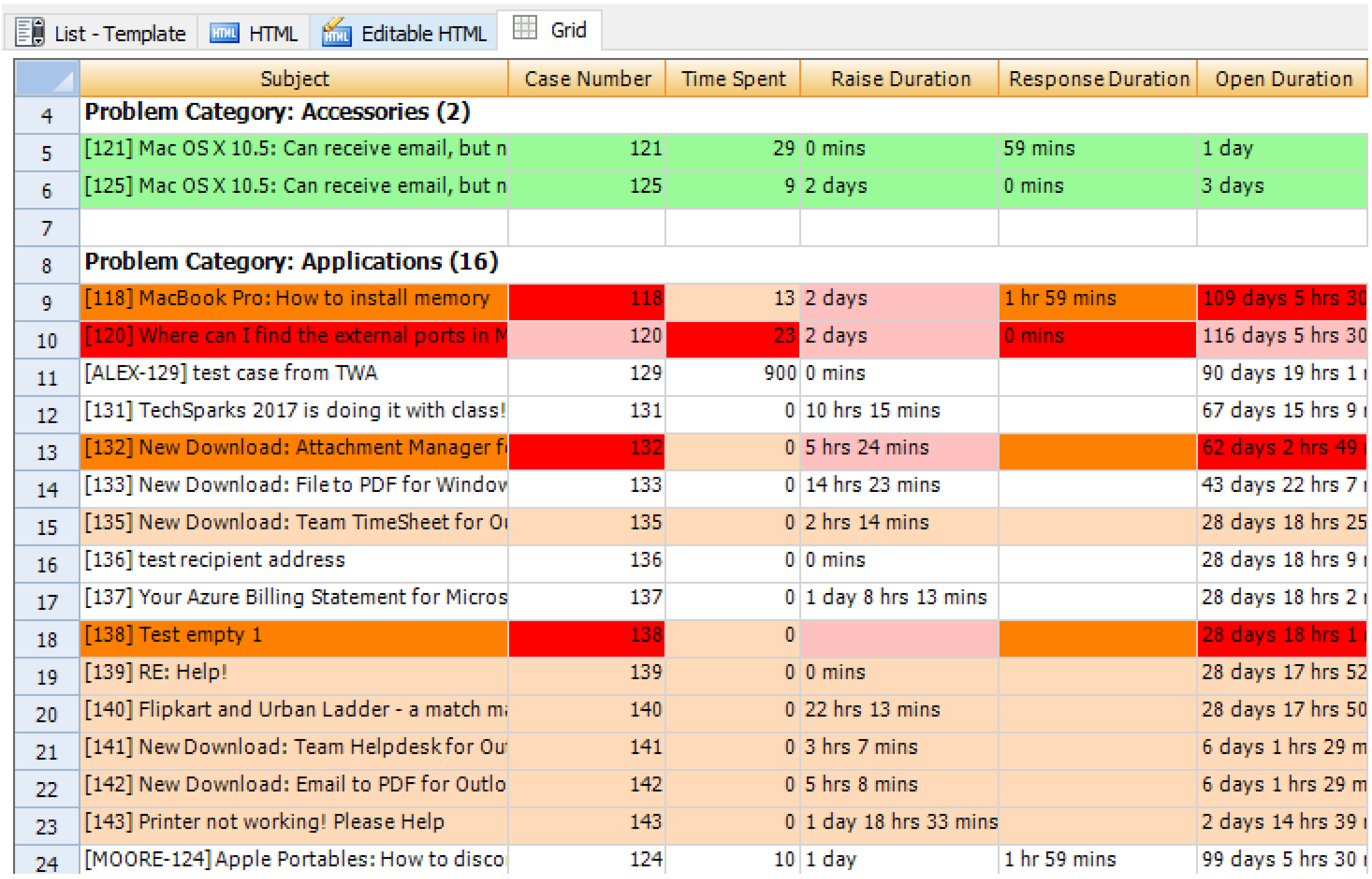
10 **HTML report view mode –** This report view presents the cases in web HTML format with color coding, group, and summary information retained. You can export this report to .htm format for your further use.



11 **HTML Editable report view mode –** This report view is exactly the same as the previous HTML mode, but with the flexibility to edit the HTML content in a WYSIWYG editor. For instance, you can customize the font, add image, change the color, layout or add any further information you require so that you can compile your own report.



12 **The Grid report view mode –** This presents the cases in excel spreadsheet like format with rows and columns, preserving color codes, summarized information etc. You can also re-edit and tweak the report. You can also copy data from this grid to Microsoft Excel or vice versa. And you can of course export the report as Excel spreadsheet file (in XLXS, XLS format).



	Subject	Case Number	Time Spent	Raise Duration	Response Duration	Open Duration
4	**Problem Category: Accessories (2)**					
5	[121] Mac OS X 10.5: Can receive email, but n	121	29	0 mins	59 mins	1 day
6	[125] Mac OS X 10.5: Can receive email, but n	125	9	2 days	0 mins	3 days
7						
8	**Problem Category: Applications (16)**					
9	[118] MacBook Pro: How to install memory	118	13	2 days	1 hr 59 mins	109 days 5 hrs 30
10	[120] Where can I find the external ports in M	120	23	2 days	0 mins	116 days 5 hrs 30
11	[ALEX-129] test case from TWA	129	900	0 mins		90 days 19 hrs 1
12	[131] TechSparks 2017 is doing it with class!	131	0	10 hrs 15 mins		67 days 15 hrs 9
13	[132] New Download: Attachment Manager fo	132	0	5 hrs 24 mins		62 days 2 hrs 49
14	[133] New Download: File to PDF for Window	133	0	14 hrs 23 mins		43 days 22 hrs 7
15	[135] New Download: Team TimeSheet for O	135	0	2 hrs 14 mins		28 days 18 hrs 25
16	[136] test recipient address	136	0	0 mins		28 days 18 hrs 9
17	[137] Your Azure Billing Statement for Micros	137	0	1 day 8 hrs 13 mins		28 days 18 hrs 2
18	[138] Test empty 1	138	0			28 days 18 hrs 1
19	[139] RE: Help!	139	0	0 mins		28 days 17 hrs 52
20	[140] Flipkart and Urban Ladder - a match ma	140	0	22 hrs 13 mins		28 days 17 hrs 50
21	[141] New Download: Team Helpdesk for Ou	141	0	3 hrs 7 mins		6 days 1 hrs 29 m
22	[142] New Download: Email to PDF for Outlo	142	0	5 hrs 8 mins		6 days 1 hrs 29 m
23	[143] Printer not working! Please Help	143	0	1 day 18 hrs 33 mins		2 days 14 hrs 39
24	[MOORE-124] Apple Portables: How to disco	124	10	1 day	1 hr 59 mins	99 days 5 hrs 30

6. 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.

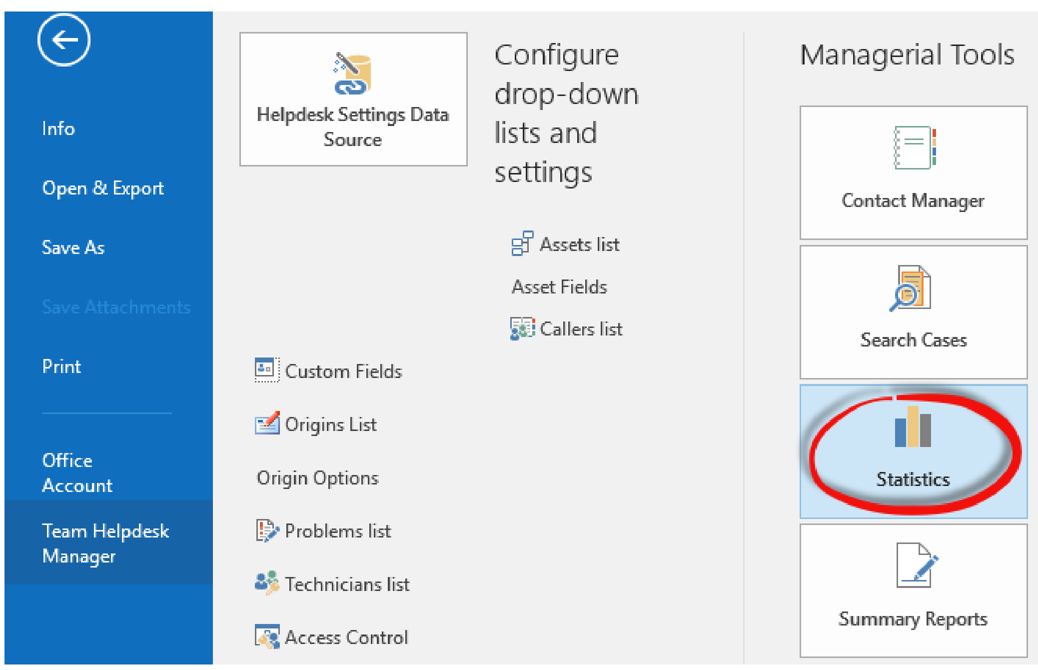
Printing capabilities - you can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including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

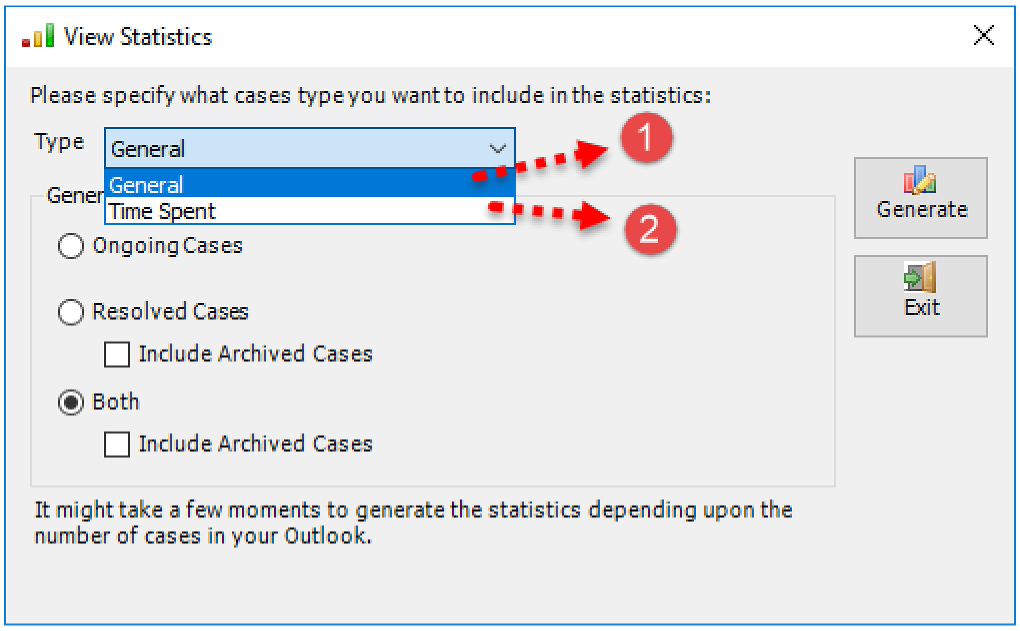
Save Reports in file - At any stage managers/technicians can save the report and distribute it to another person for analysis by network or email, so when the recipient gets the file, he or she can open it and see the same OLAP slice.

Launching the statistics tool:

Go to **Outlook > File > AssistMyTeam Helpdesk Manager** tab, and click ‘**Statistics**’ button.



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. You can further have the choice to include archived old cases that were moved to another exchange folder or PST file.



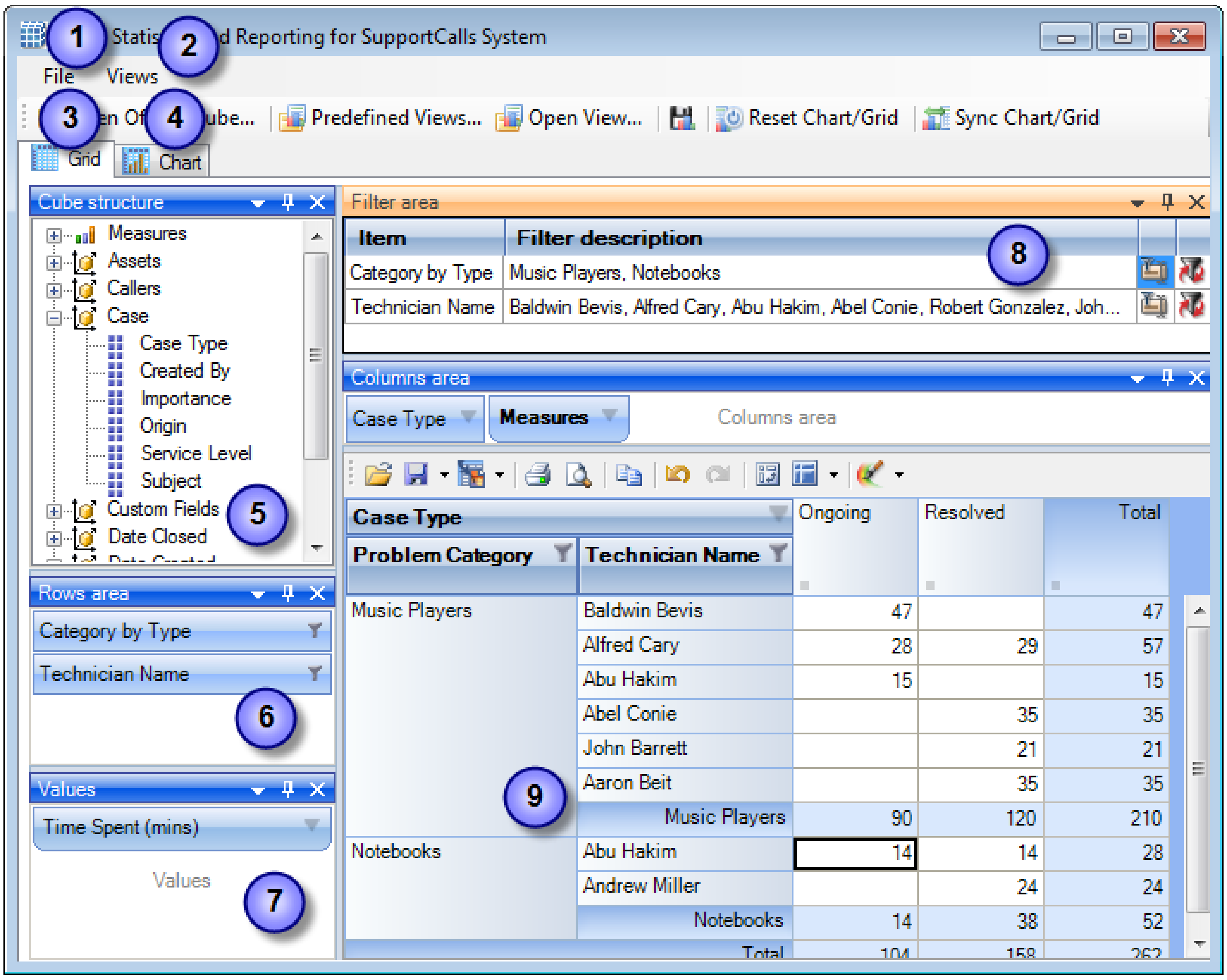
There are two parts of OLAP Statistics

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

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

6.1 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.

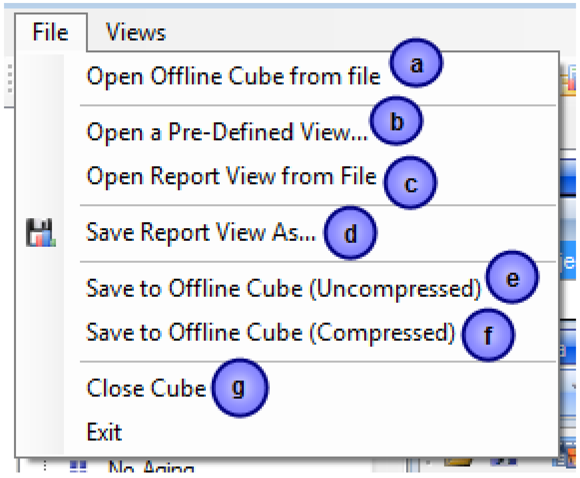


Instrumental panels can be:

- 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.

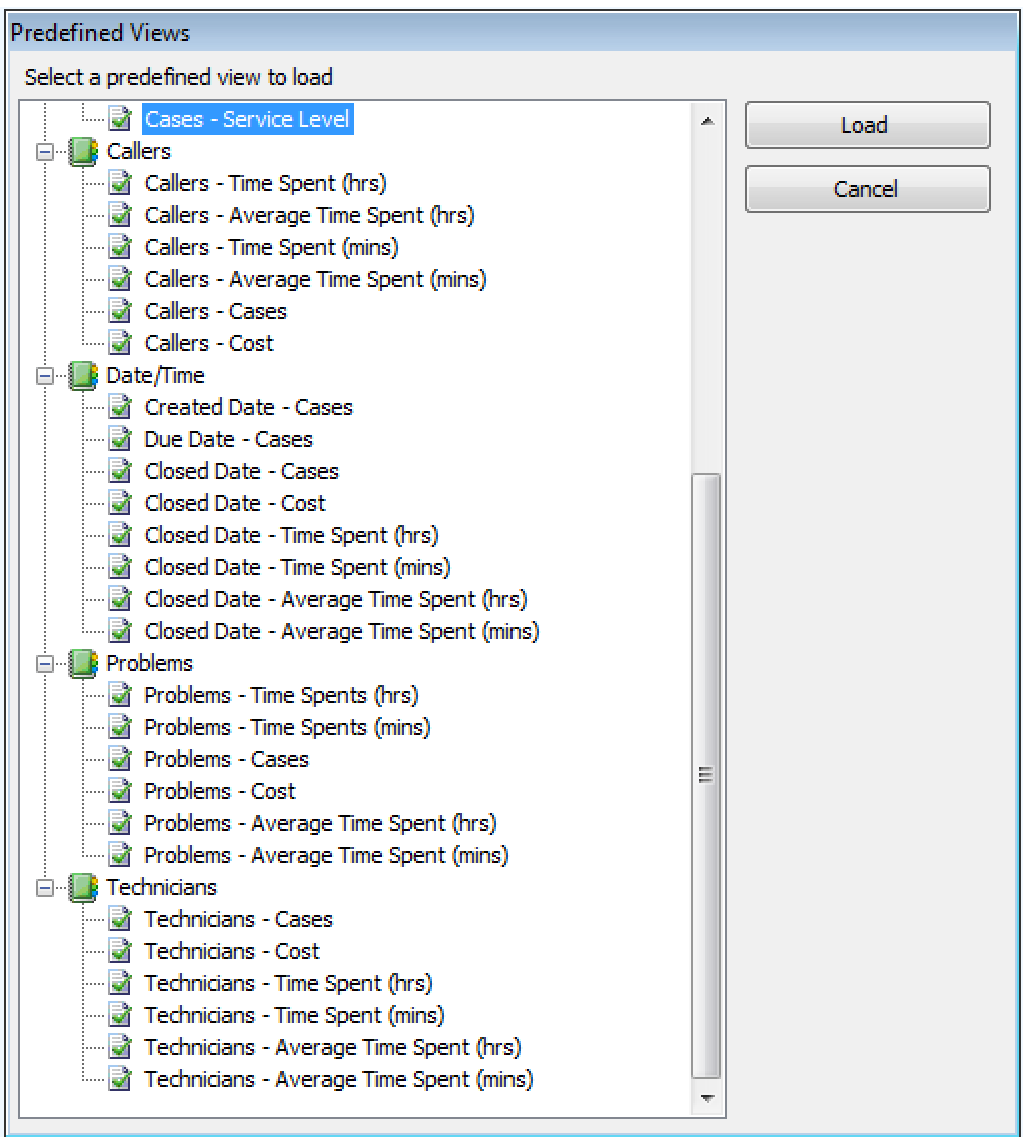
1 **The File menu**
The file menu consists of the following commands:



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.

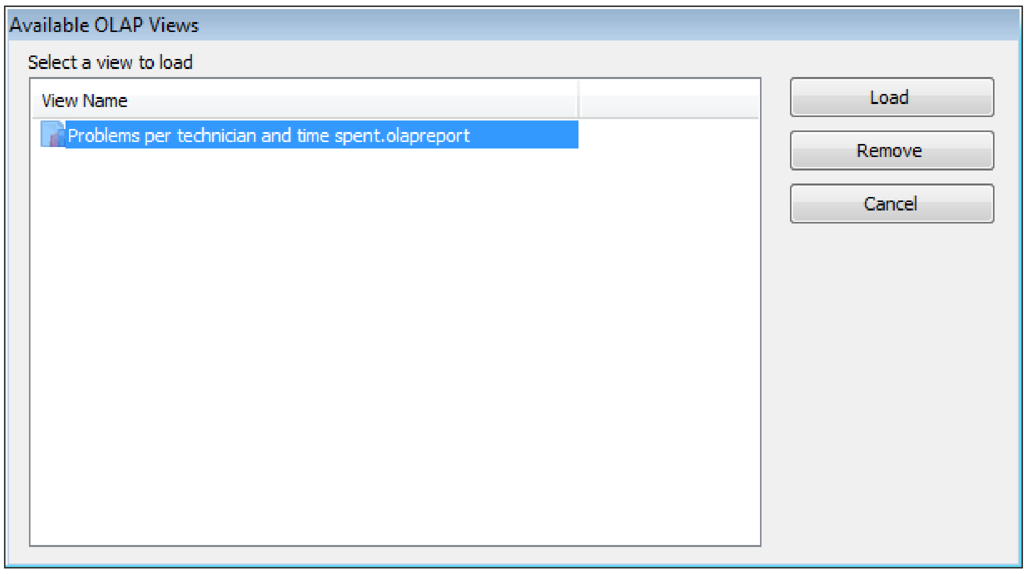
In such scenario, you have the option of connecting to an offline cube, which was previously generated and saved to your local folder using this utility. An offline cube file has the extension - ***.offlinecube*** and can be either in compressed or uncompressed format. An offline cube gives the same 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 Technicians 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).

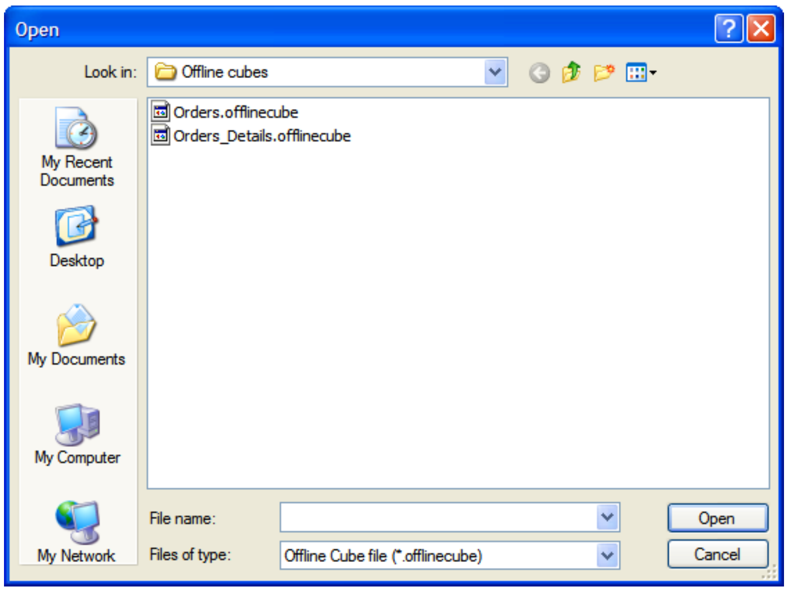


c) Load report file from Favorite – You can customize or create your own views and save them to the favorite. Once saved, your views would be saved under the 'C:\Users\USERNAME\Documents\AssistMyTeam Helpdesk Reports\Views' folder (in windows Vista and 7). For windows XP, it should under My Documents.

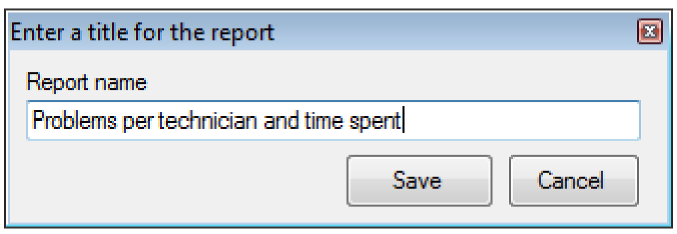
When you open the favorite from this menu, you can choose to load your saved view.



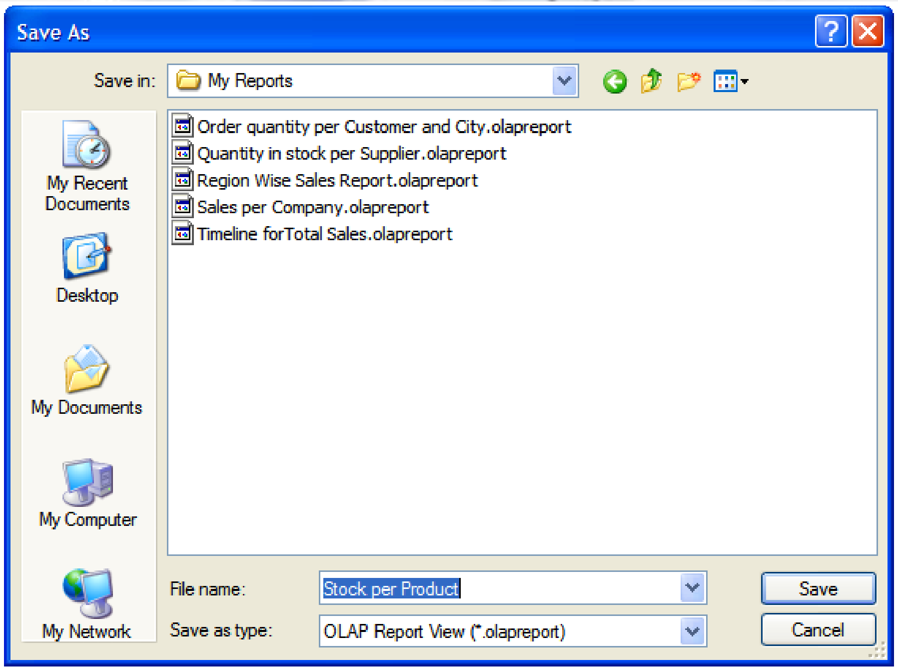
d) **Open report view from file** - Once a particular snapshot of the statistics is achieved, you may want to save it for future reference or share it among your team members. A report view is the current state of the statistics in the Grid/Chart working area, with specific member fields on the pivot 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.



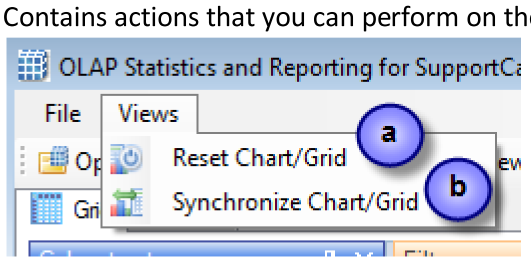
g) **Save to offline Cube** – Once you have loaded a live cube from the cases, you have the option to save the entire cube data to a file (with the extension - ***.offlinecube***) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed format,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

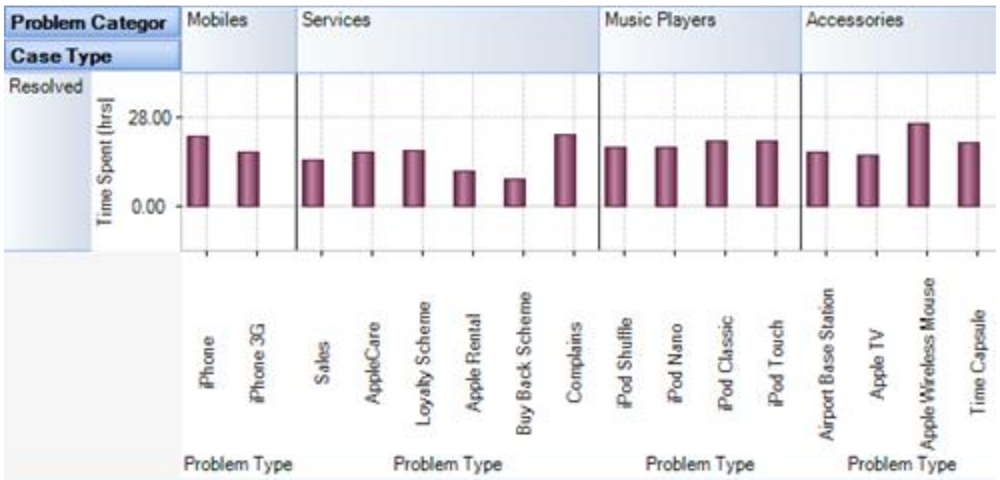
For example, if you are in the grid view, and if you pressed 'Synchronize Chart/Grid' it would read the state of the Grid view and impart the same state (same members and measures) to the Chart view and vice versa. Each of the Grid and Chart view can be worked independently as long as you don't press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

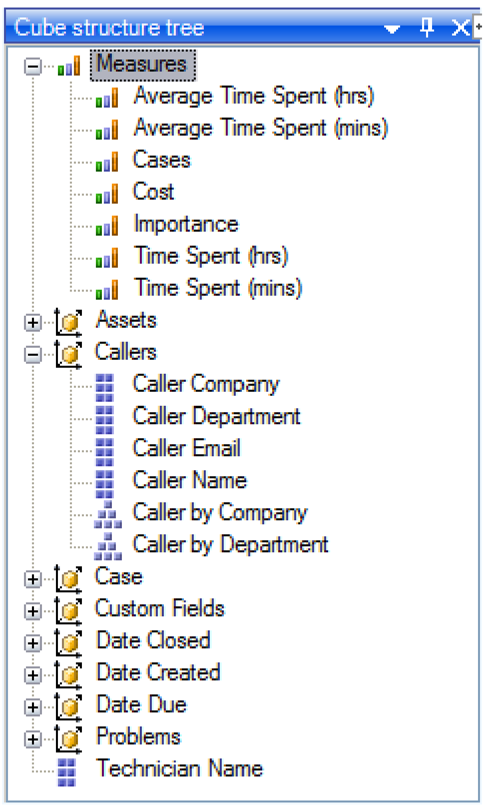
While OLAP Grid allows working with numbers, the OLAP Chart allows representing the project data graphically. This gives managers and members a unique opportunity to analyze their project data visually, dealing with charts rather than numbers, which is much easier to perceive.



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).

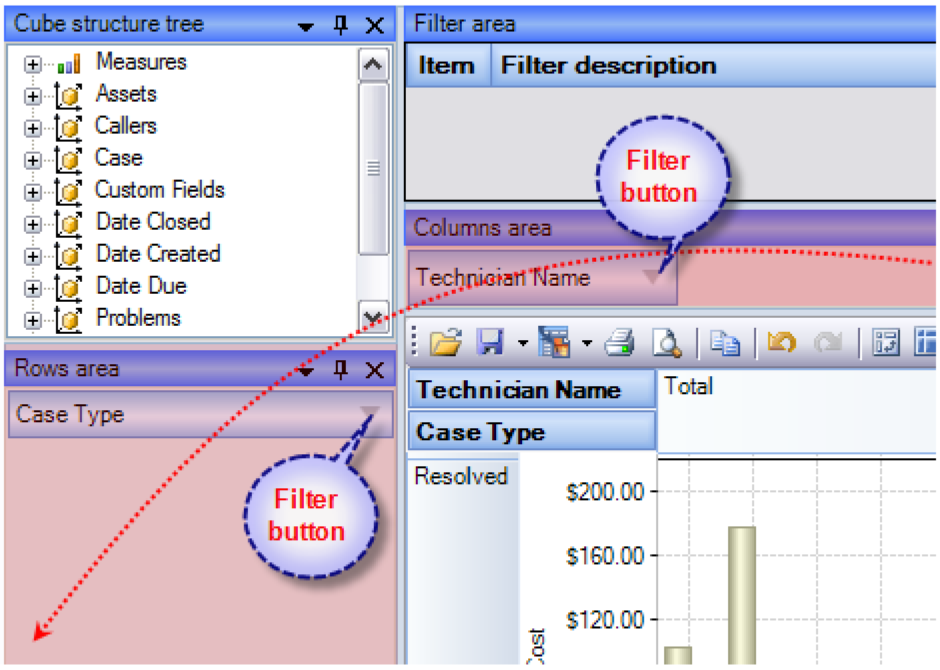
- Measures are grouped in the Measures category.
- Hierarchies are sorted into folders - dimensions. If there's only one dimension in a hierarchy, it will be displayed in the tree root.

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

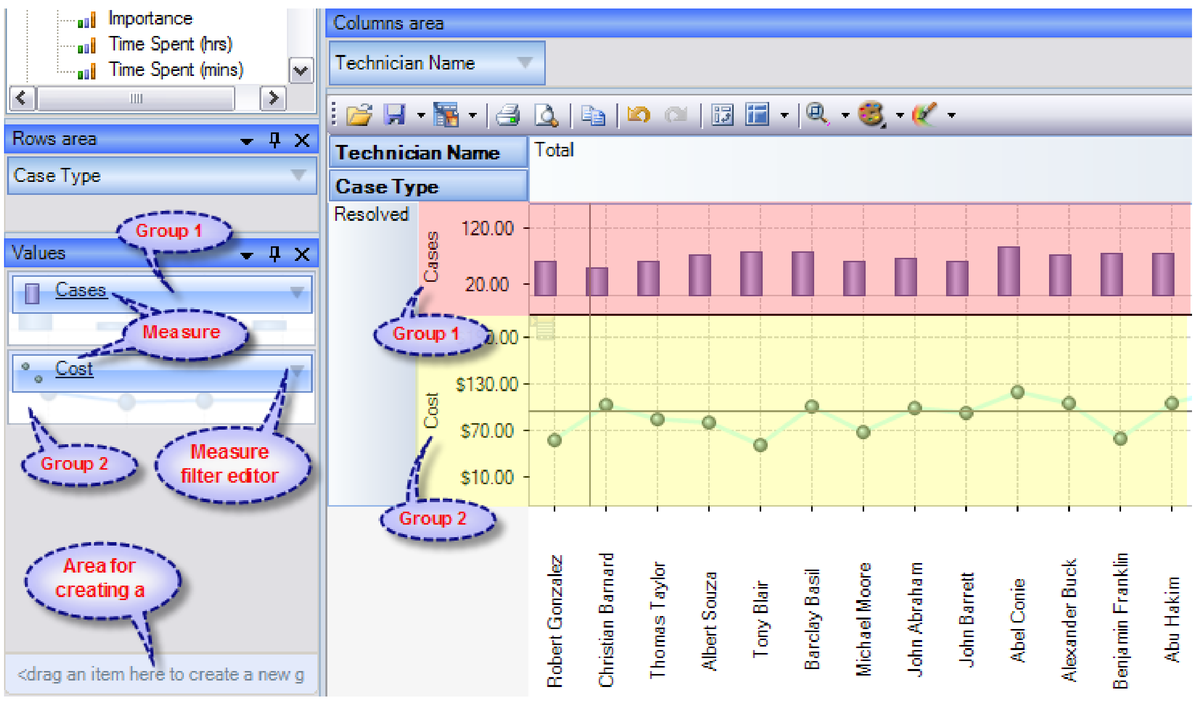
Pivoting panels

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.



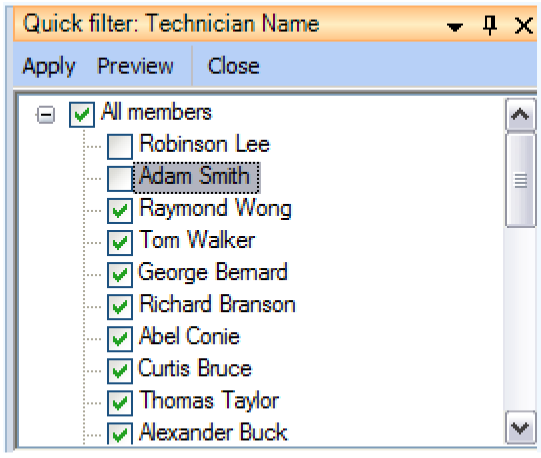
You can drag measures from one group to another, or extract measures from groups to delete them. To create a new group, you need to drag a measure to a place on the panel not occupied by another group or to the <drop an item to create a new group> panel.

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.

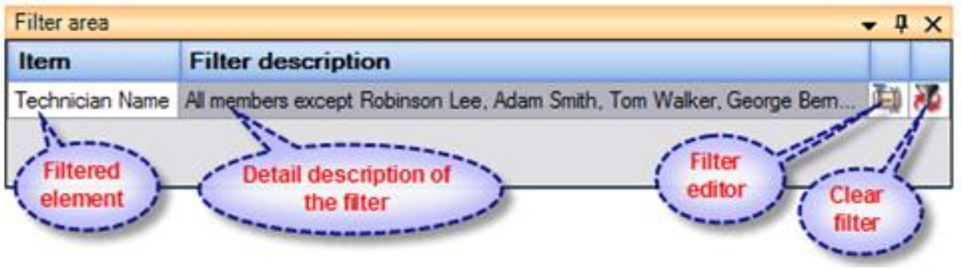
8 **Filter panel**

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

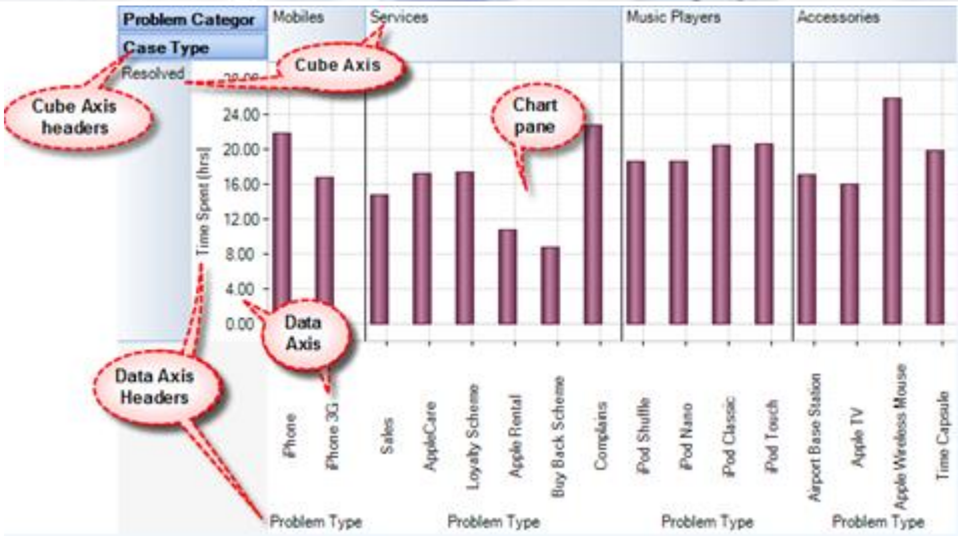
The OLAP-slice data is displayed in working area. In its upper part there is a menu for the quick access to the frequently used commands[2]. The rest is occupied by the current OLAP-slice and consists of the following parts - Cube Axis headers, Cube Axes, Data Axes, Data Axis headers, Chart Panes.

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

6.2 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.

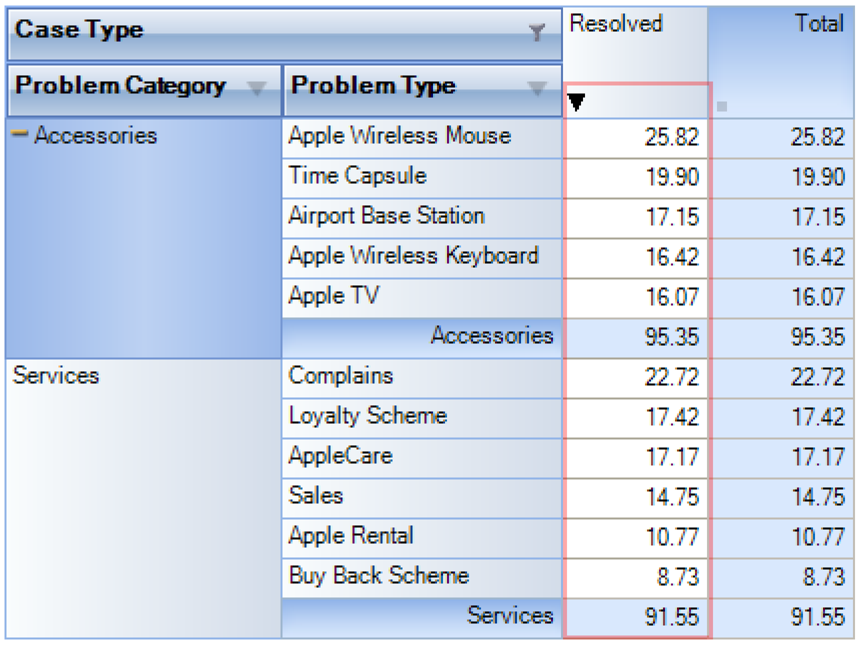
Mouse Action	***Component Action***
Scrolling the mouse wheel	Vertical scrolling of the table
Scrolling the mouse wheel with the Shift button held down	Horizontal scrolling of the table

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.

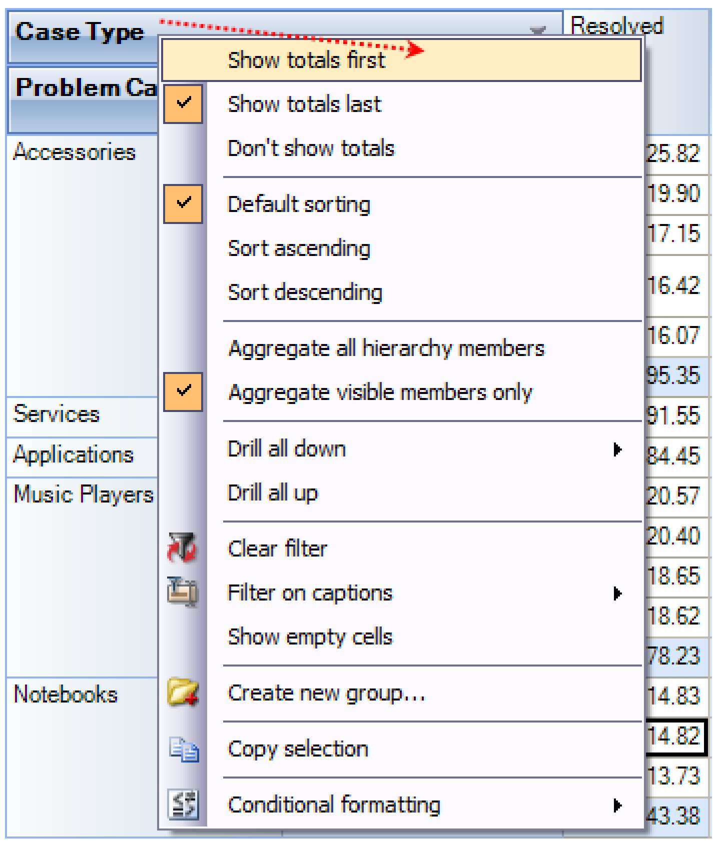
You can copy the data from the selected area to the clipboard by pressing Ctrl+C. If there's no selection, pressing these buttons will copy the whole OLAP-slice to the clipboard.

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].



Problem Category	Problem Type	Resolved	Total
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.



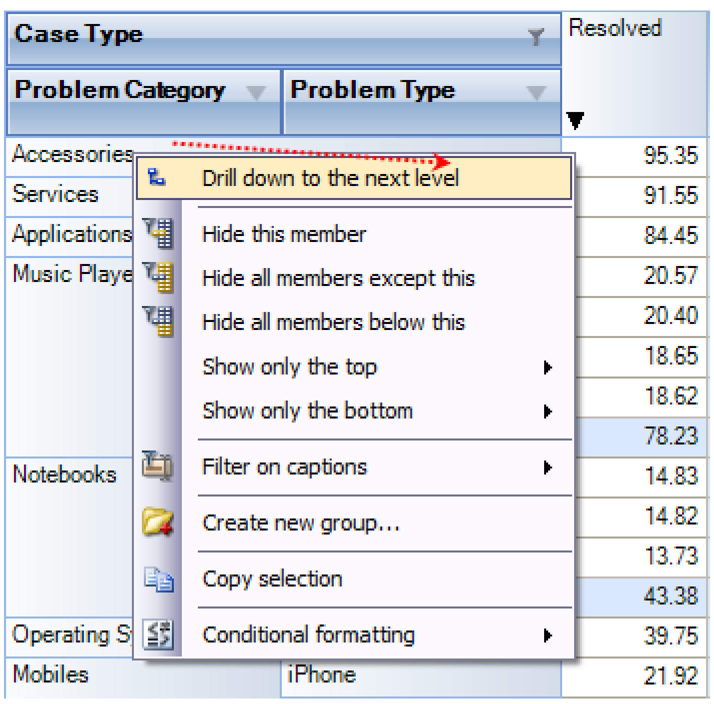
Hierarchy levels' menu

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

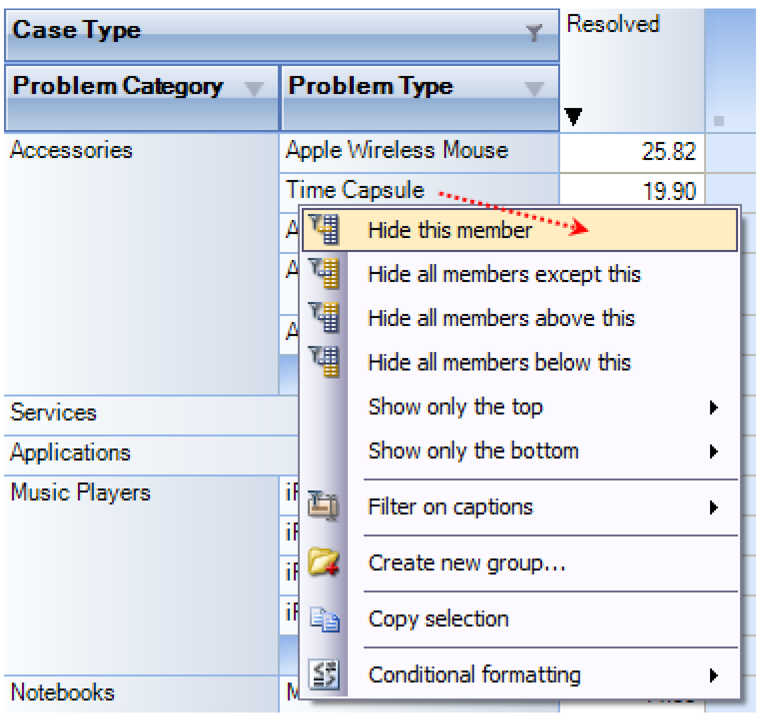


The view of the context menu of the hierarchy members' area

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

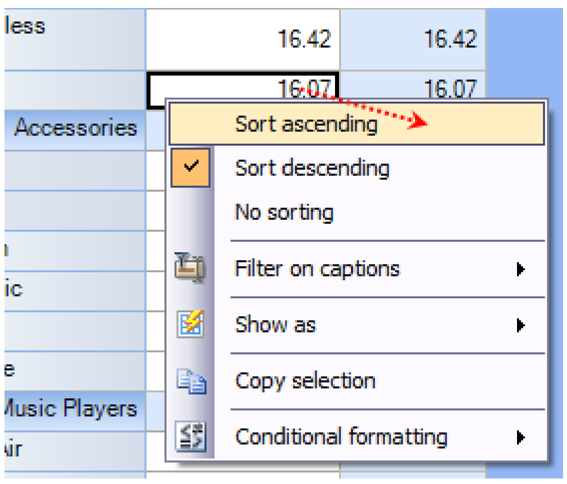


The context menu that appears above the group cell.

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

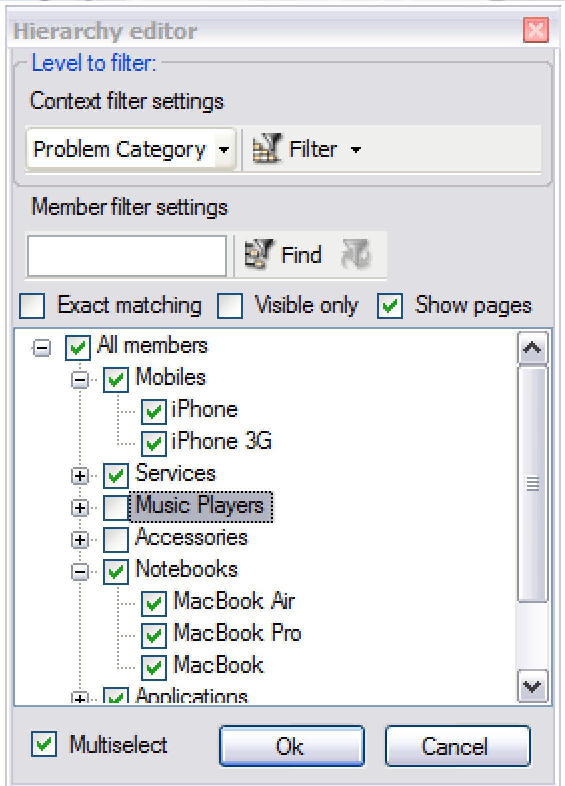


The context menu that appears above the group cell:

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.

6.3 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

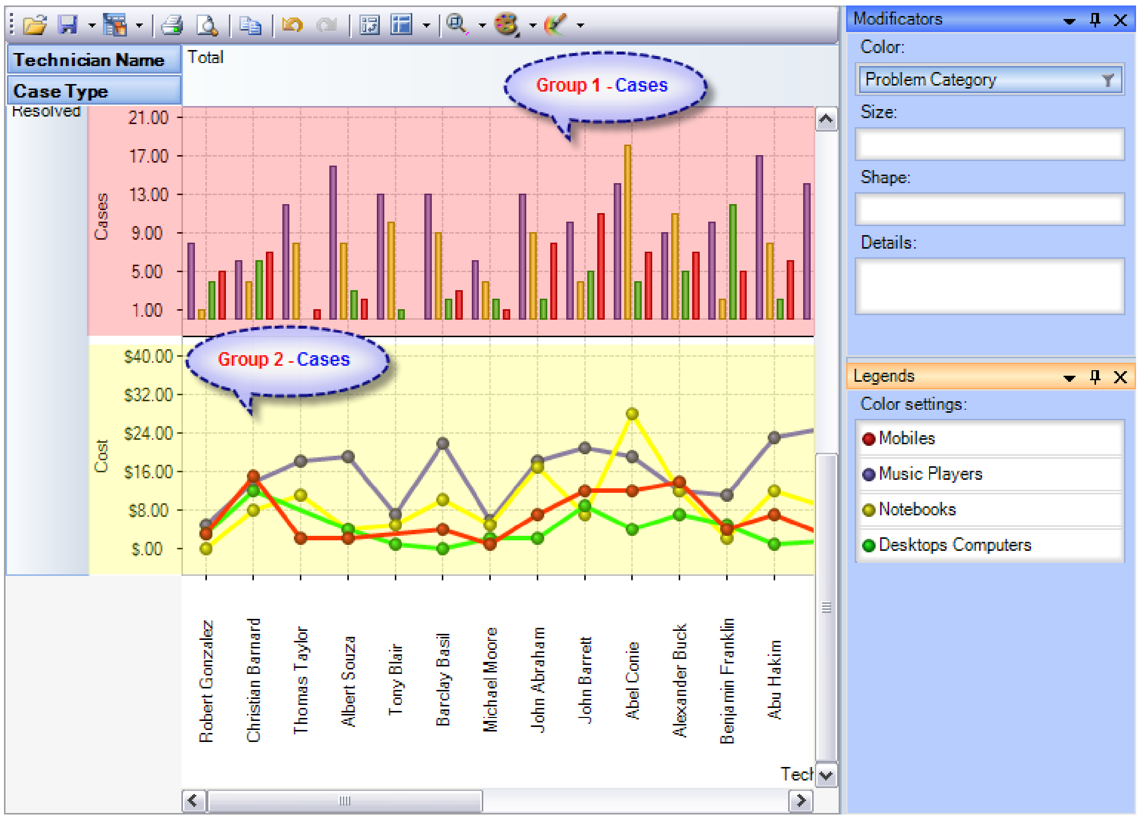
This panel houses all the frequently used operations on the OLAP chart - save, export, print and display options.

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 easily 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

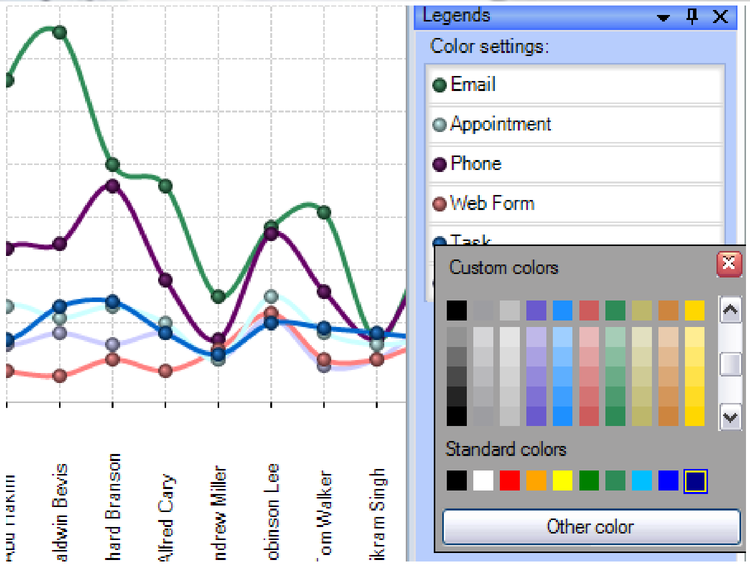
If a measure is placed on the Color pane, its values range is mapped to the given colors range so that it's tremendously easy to spot the top/low values. If you select the discrete gradient type, you'll be able to set threshold values for filling the Chart elements. While the continuous gradient will 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

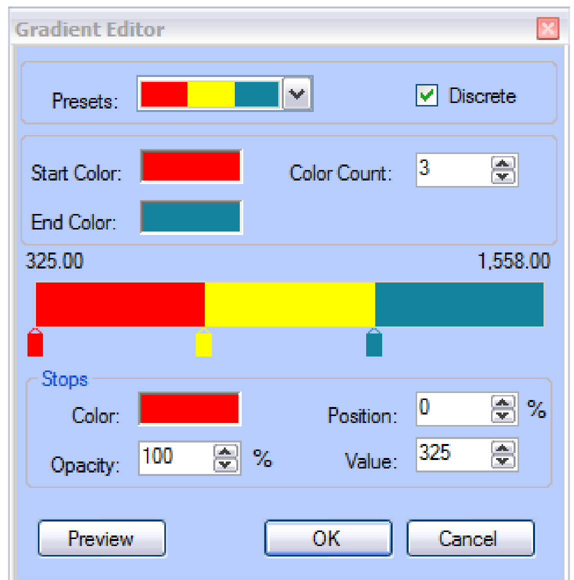
To select a color, simply double-click the appropriate element and choose a color from the pop-up editor.

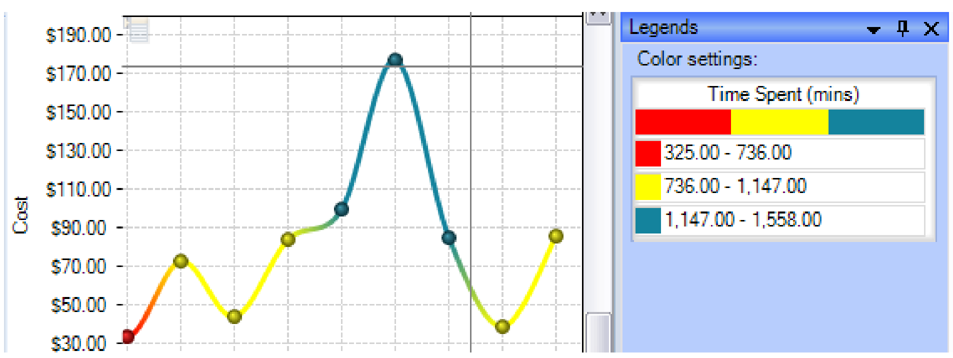


Setting the Gradient legend

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.

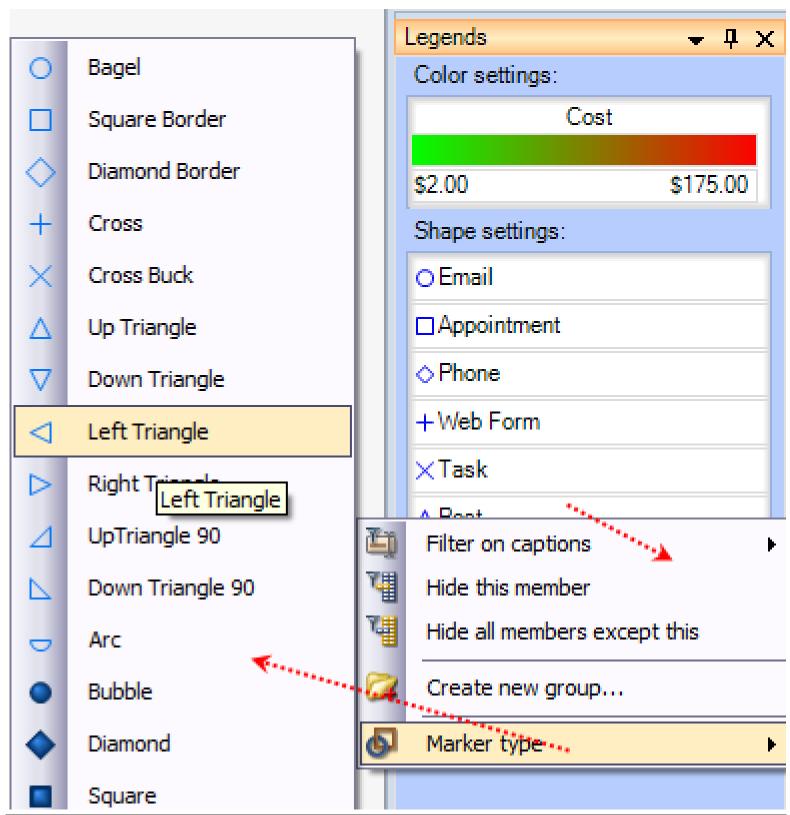
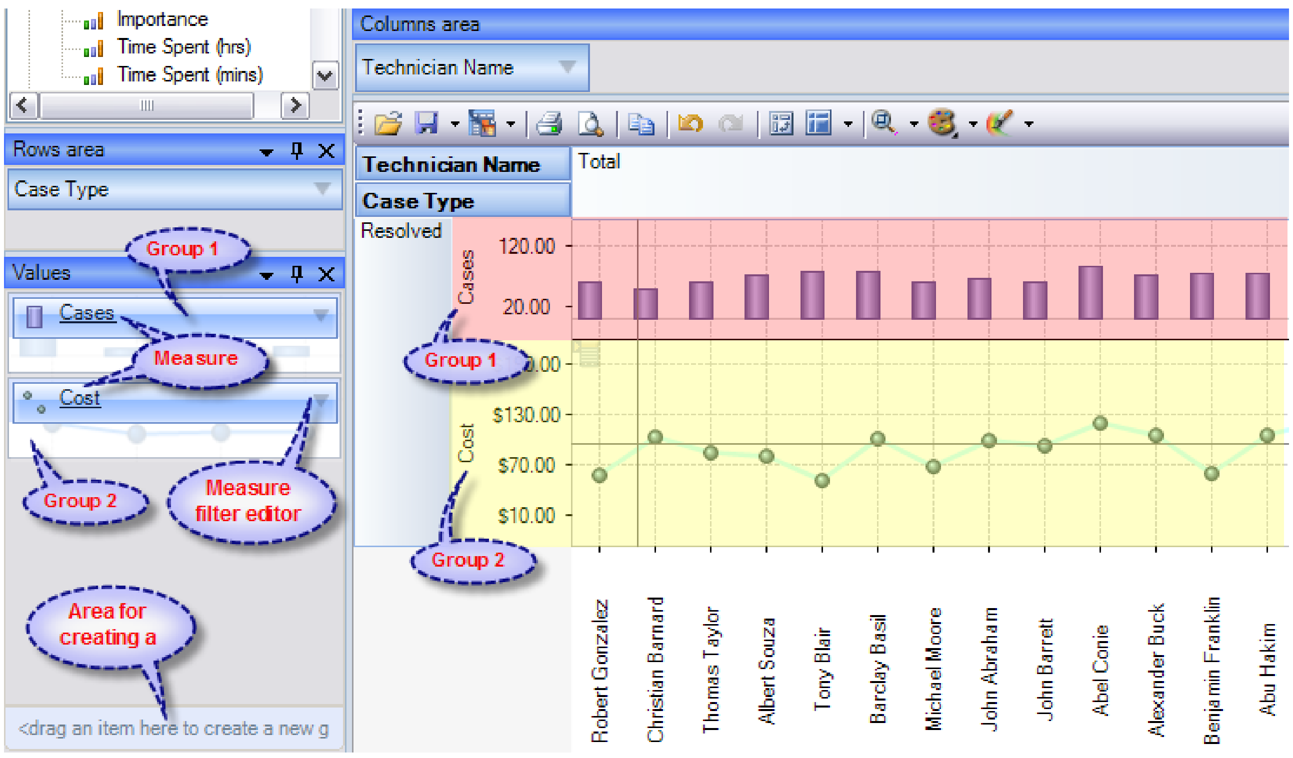


Chart Panes

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.

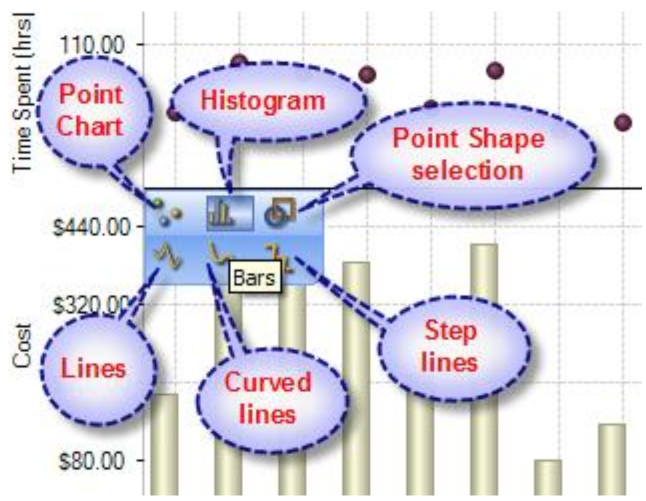


Chart type menu

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

Navigation

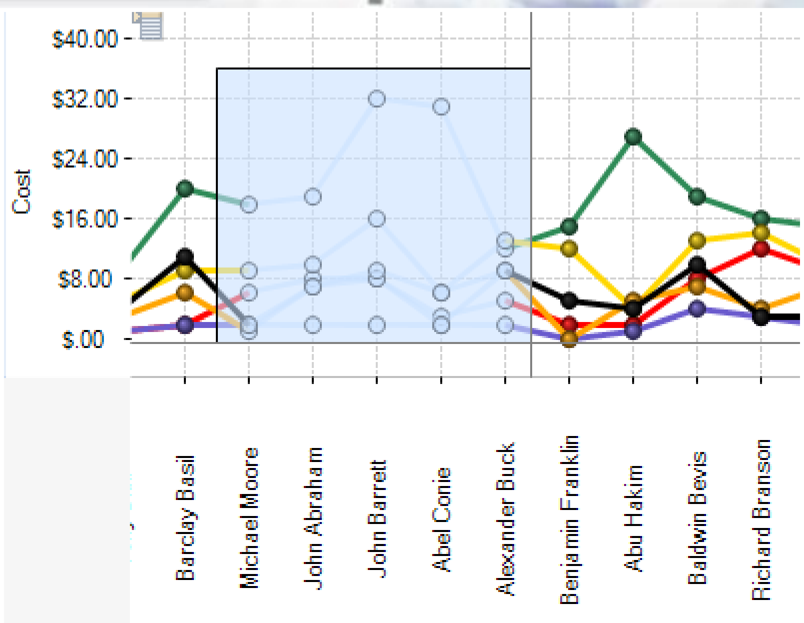
If the content of the Grid exceeds the client area, the scroll bars will appear. You can scroll down the data using the mouse wheel. To scroll the Grid in the vertical direction, turn the mouse wheel, while holding Shift.

Selecting Data

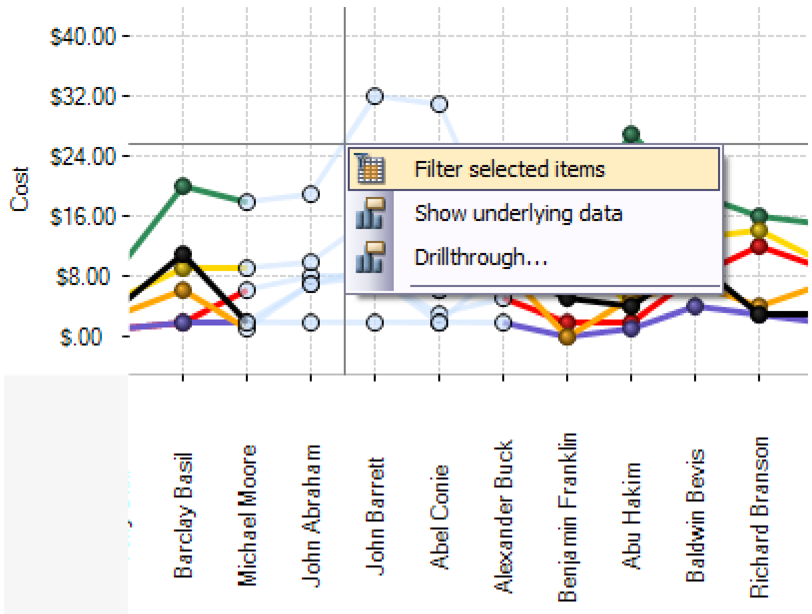
You can select Chart points with the standard Windows' method. Holding down the Ctrl button, you can add selected points, holding down the Shift button, you can select the horizontal range. You can filter the Grid's points while selecting. In that case, the corresponding hierarchy members will be filtered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

Selecting and filtering parts of Charts

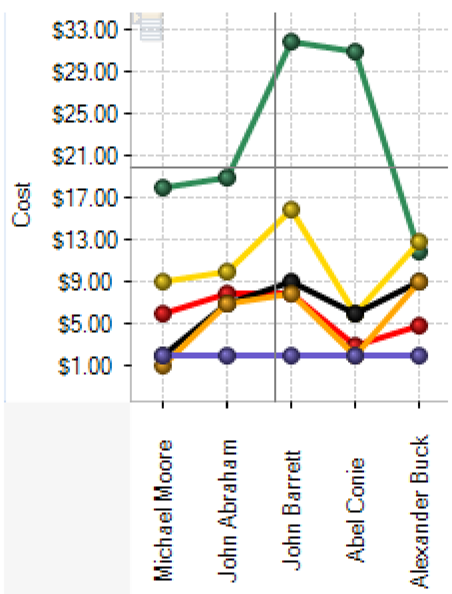
a. Selecting some of the Chart points



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

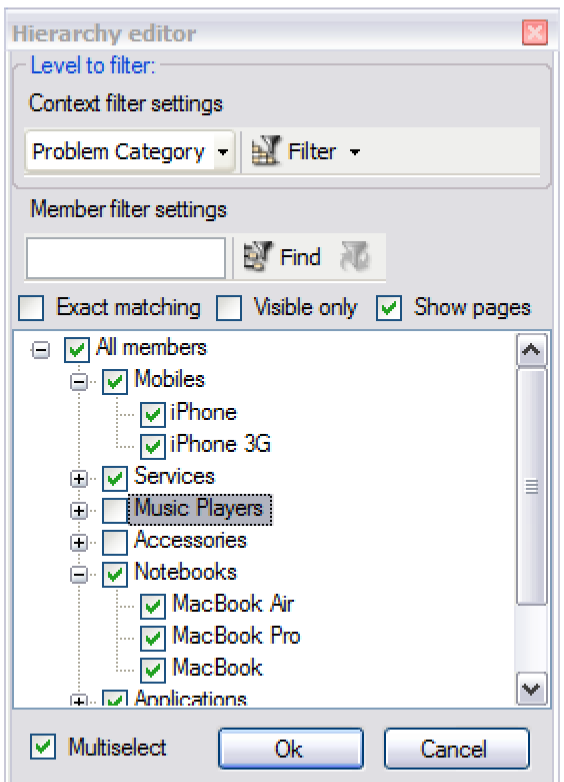
In case you need to collect data not from the whole Grid, but just from a part of it, the component has a few functions at your disposal: they let you select or remove elements from the slice. Also, there is a standard option of exporting data into a number of formats and printing out the content of 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

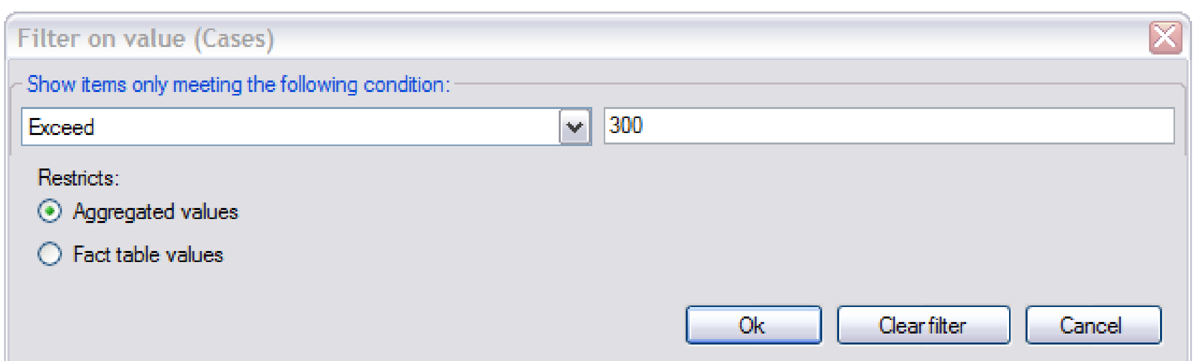
Filter on hierarchy level
The Filter area of the Editor becomes visible only in case if filtering by hierarchy levels is available. To apply a filter to hierarchy members, you need to select a hierarchy level (if there's more than one) and assign the Filter condition in the Filter menu. In the same menu,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

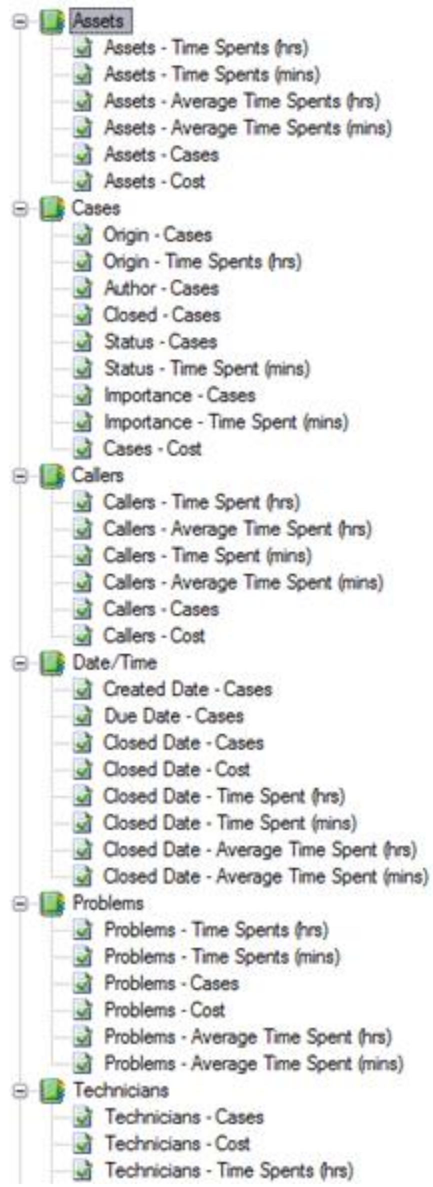
Filtering a single member of a hierarchy
By default, the Editor is able to select any number of hierarchy members. To switch to the single-select mode, uncheck the "Multiselect" box. In that case, only one the hierarchy member with all its parents and members will be selected.



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



6.4 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 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.

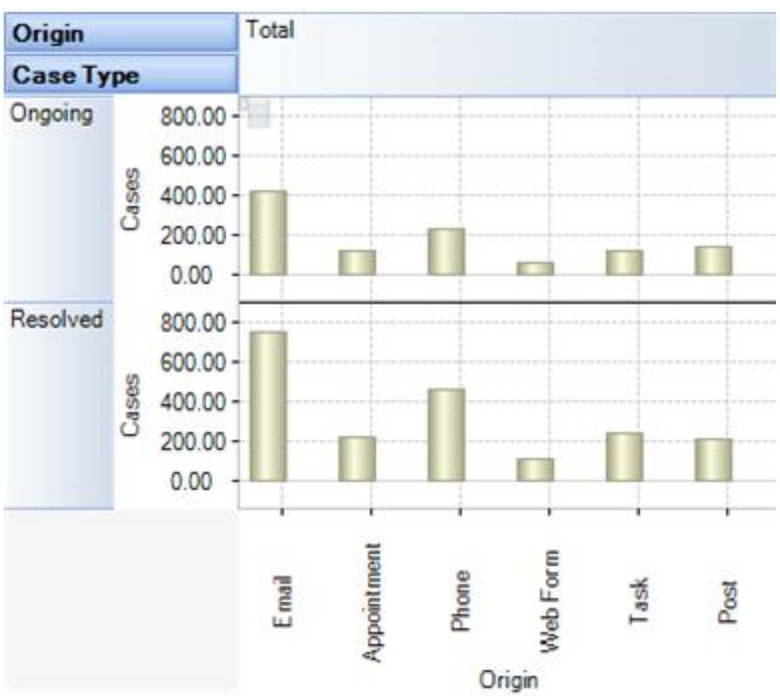
There are several predefined reports in each of the report categories, and each report is run directly on a mouse-click from the tree view. Around 40 reports are made available for instant details about the help desk activities. Any of the predefined reports can be also be edited so you can customize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

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

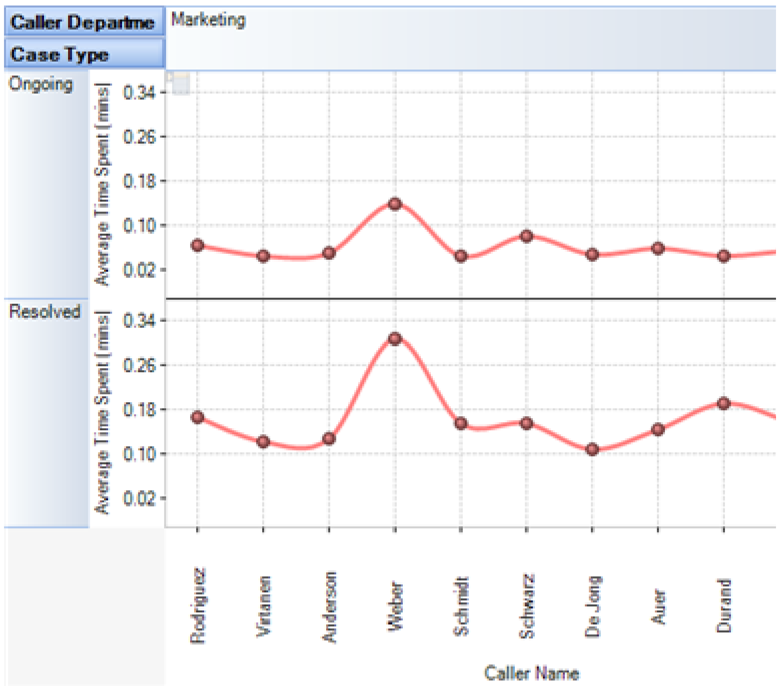
All these categories have reports available based on Priority, Requester, Technician, Category and Request Date.

Some sample OLAP charts of the predefined reports

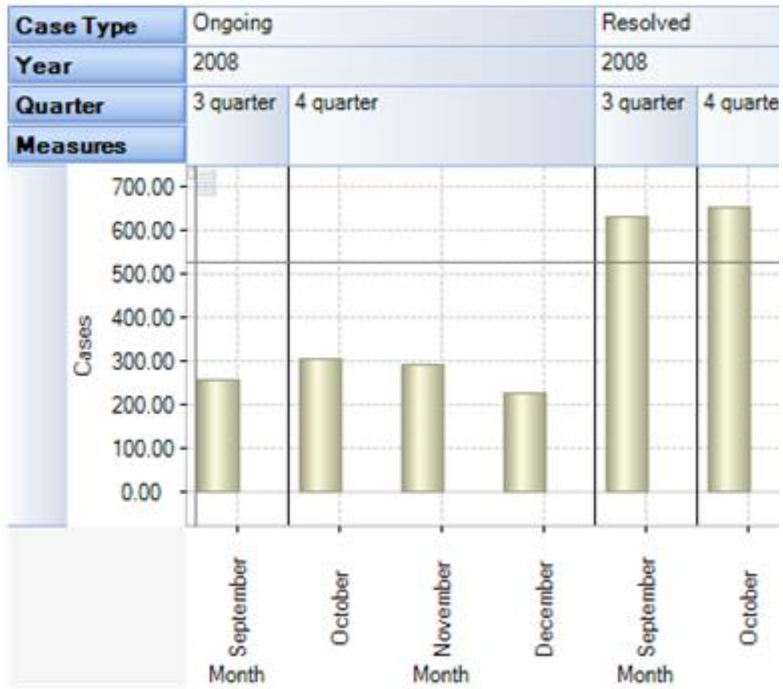
B) Cases Count by Origin



C) Average time spent on caller

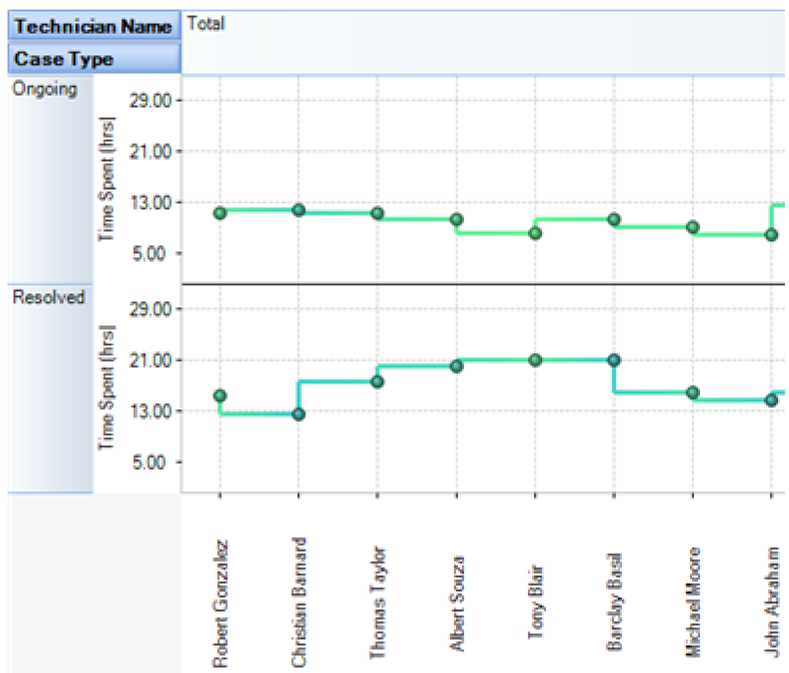


D) Due date



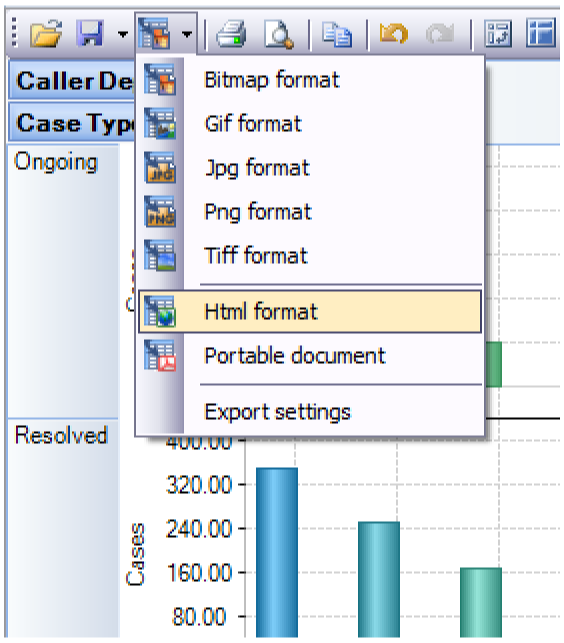
E) Cost per problem category

F) Time spent by technician

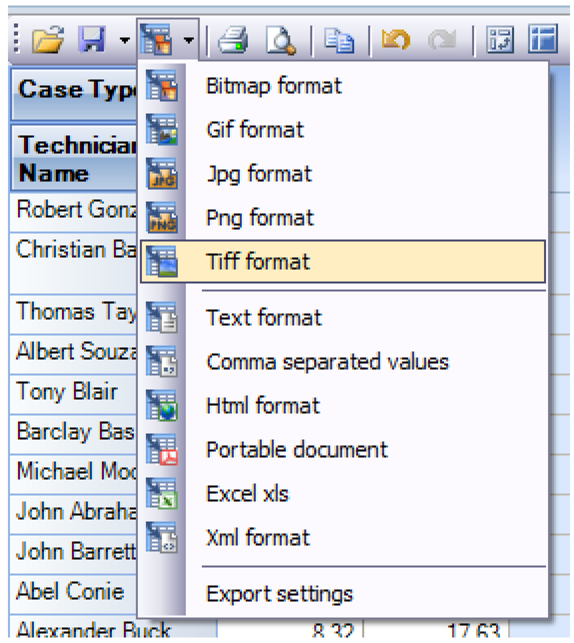


6.5 Printing, exporting statistical data and charts

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.



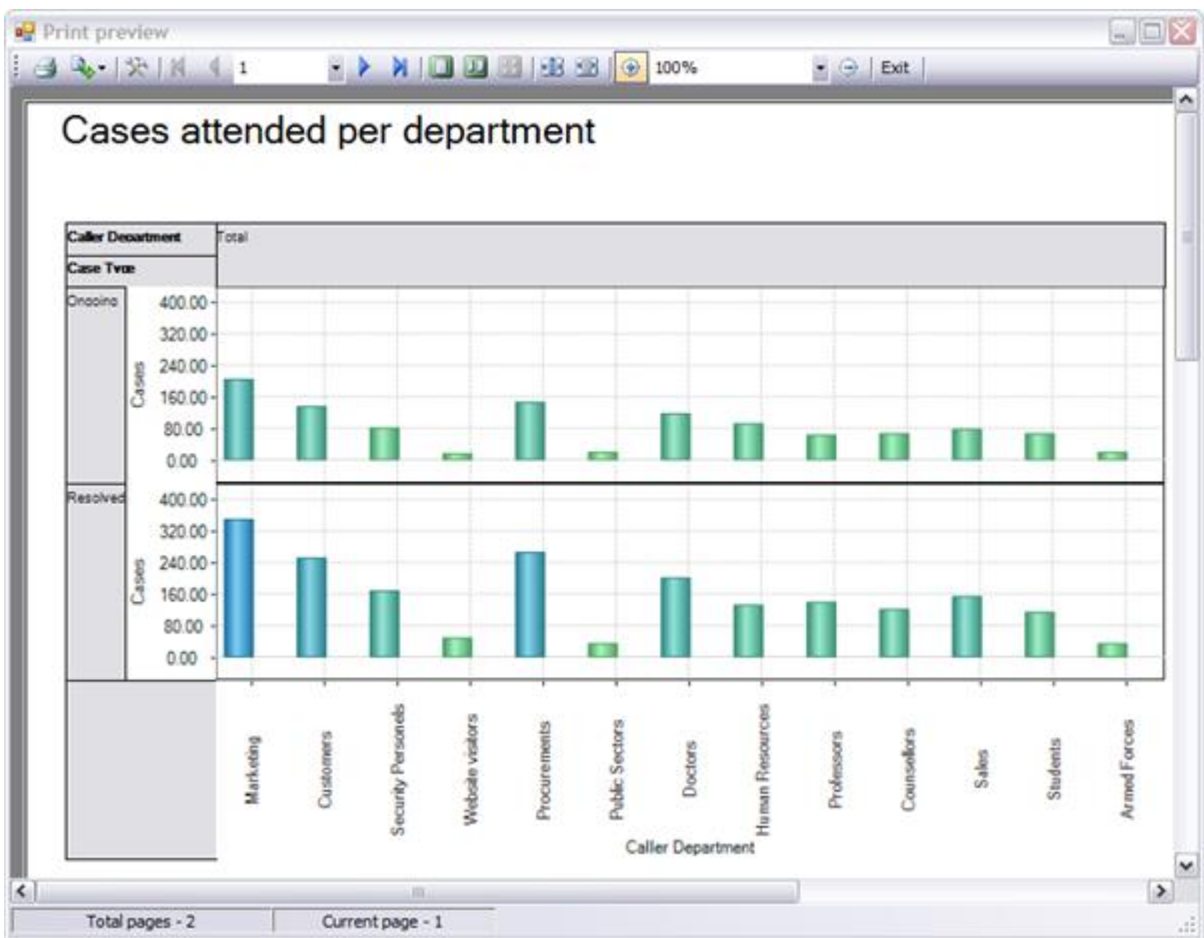
Available export formats in Chart View



Available export formats in Grid View

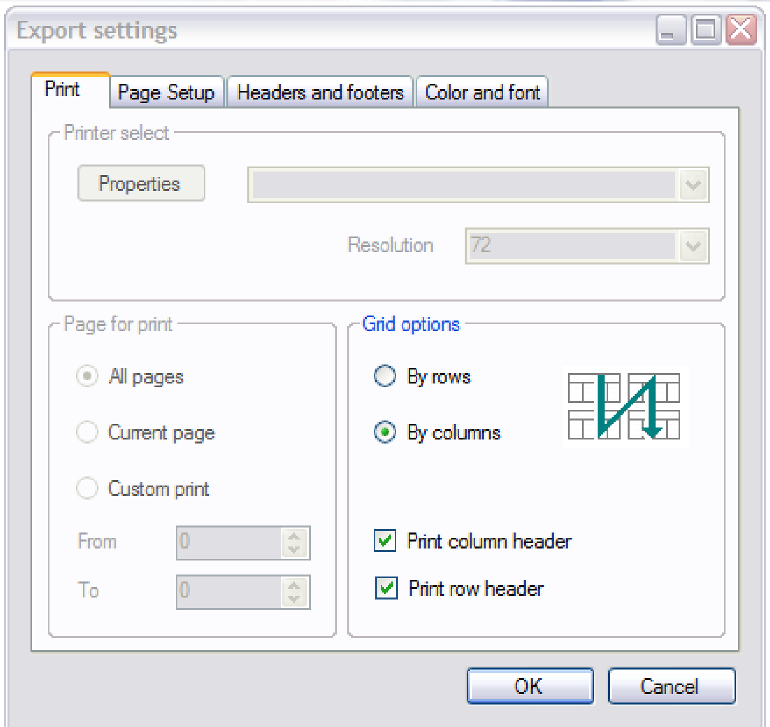
Printing

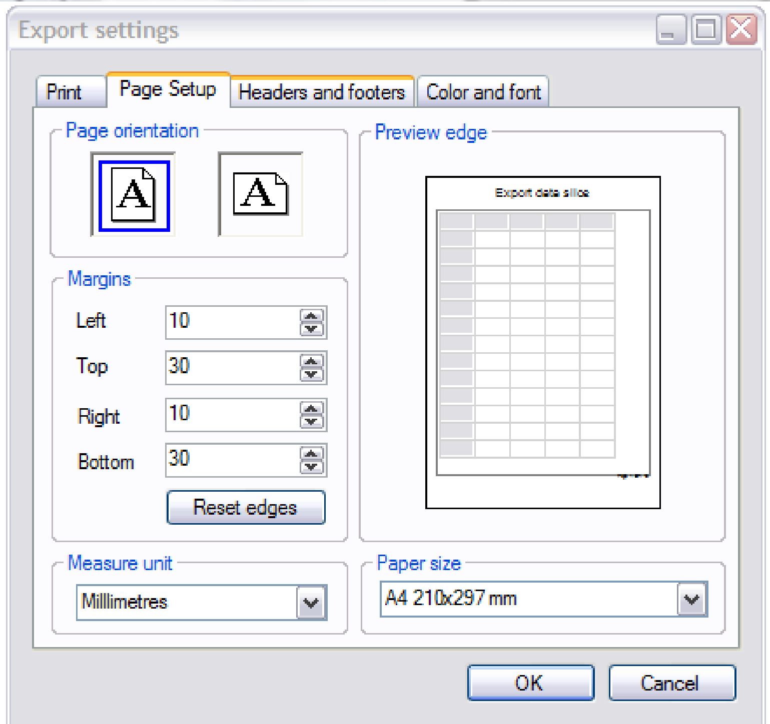
You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

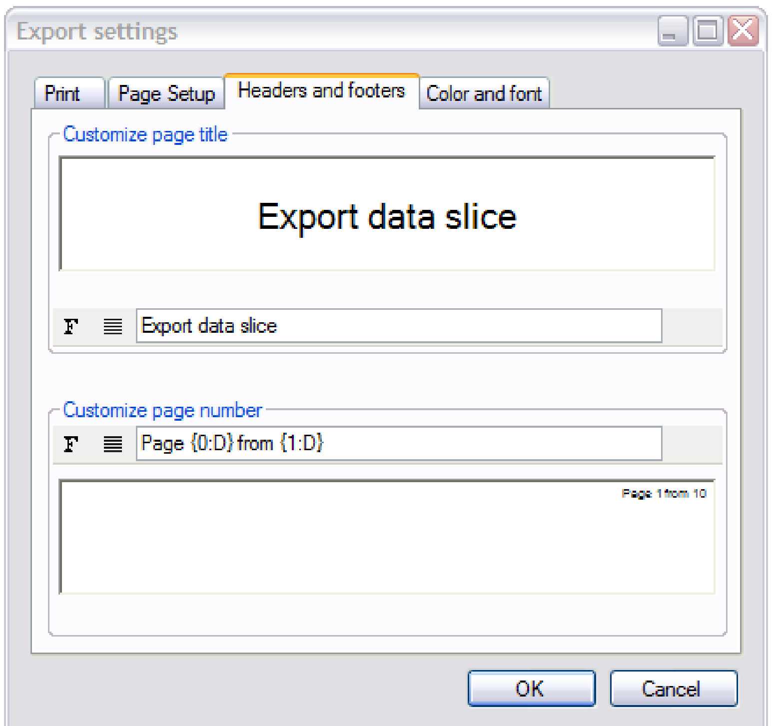


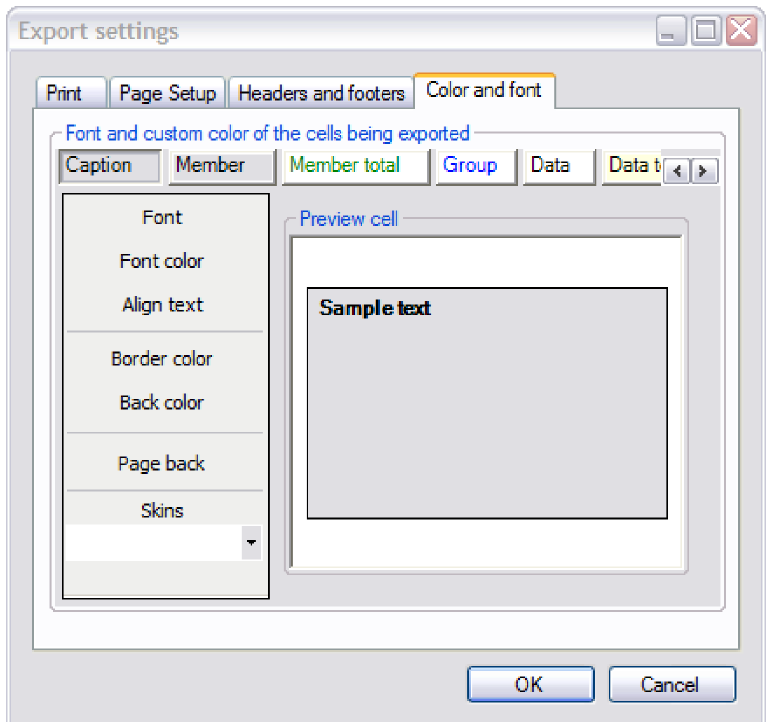
Export Settings -This tool allows you to customize the appearance of the reports to be printed or saved to a file format. You can specify the page size, orientation, headers & footers and color of the fonts and page background.


Not just emails, do more with your Outlook
Request for support
Reply with a resolution
Helpdesk for Outlook


Export settings
Print
Page Setup
Headers and footers
Color and font
Printer select
Properties
Resolution
72
Page for print
All pages
Current page
Custom print
From
To
Grid options
By rows
By columns
Print column header
Print row header
OK
Cancel


Export settings
Print
Page Setup
Headers and footers
Color and font
Page orientation
Preview edge
Margins
Left
10
Top
30
Right
10
Bottom
30
Reset edges
Measure unit
Millimetres
Paper size
A4 210x297 mm
OK
Cancel

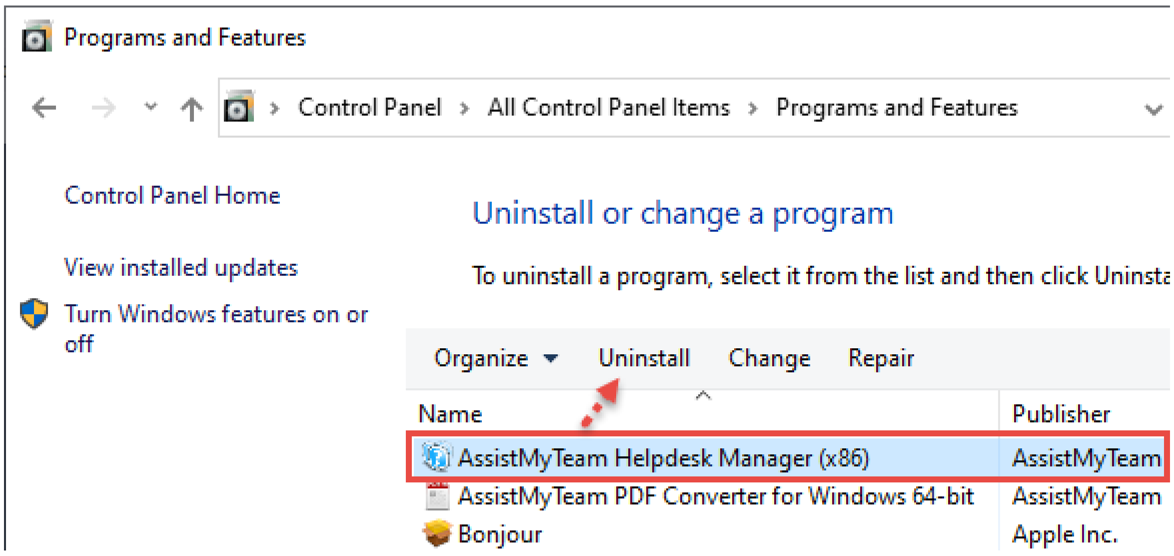

Export settings
Print
Page Setup
Headers and footers
Color and font
Customize page title
Export data slice
Export data slice
Customize page number
Page {0:D} from {1:D}
OK
Cancel


Export settings
Print
Page Setup
Headers and footers
Color and font
Font and custom color of the cells being exported
Caption
Member
Member total
Group
Data
Font
Font color
Align text
Border color
Back color
Page back
Skins
Preview cell
Sample text
OK
Cancel

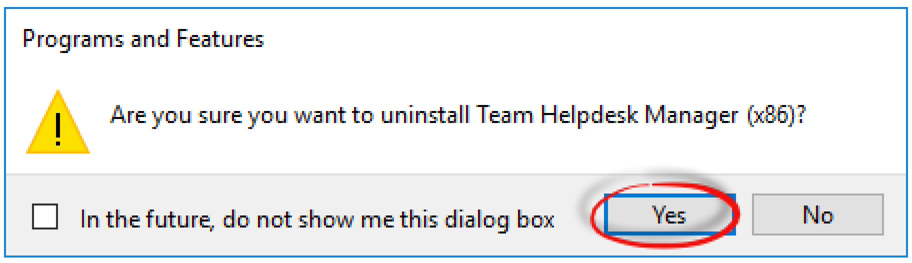
7. Uninstalling AssistMyTeam Helpdesk Manager add-in

To uninstall the AssistMyTeam Helpdesk Manager 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 Manager (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).

Step 4: Uninstalling the add-in does not remove the helpdesk database from your SQL Server or Azure Cloud server. You will need to manually delete that database.

8. 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.