

AssistMyTeam Issue Tracker

for Outlook & SharePoint

Installation and Configuration

This guide will take to step by step on installing and configuring Issue Tracker (Personal Edition) in your Microsoft Outlook (2010, 2013, 2016, 2019, 2021 and 365).

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There are two different setups – one each for 32-bit Outlook and 64-bit Outlook

IssueTrackerPersonalSetup_x86.zip (for 32-bit Outlook)

IssueTrackerPersonalSetup_x64.zip (for 64-bit Outlook)

Extract these file contents to a file folder.

Requirements:

- *.NET framework 4.5 or above*
- *Outlook 2010, 2013, 2016, 2019, 2021 and 365 (both 32-bit and 64-bit versions are supported).*
- Any SharePoint version starting with WSS 2.0 to the latest SharePoint 2016 including online/cloud SharePoint such as Office 365.

There are three (3) sections for installation and configuration:

I) **Files Installation**, II) **Choose SharePoint Ticket Lists**, and III) **Choose SharePoint KB List**

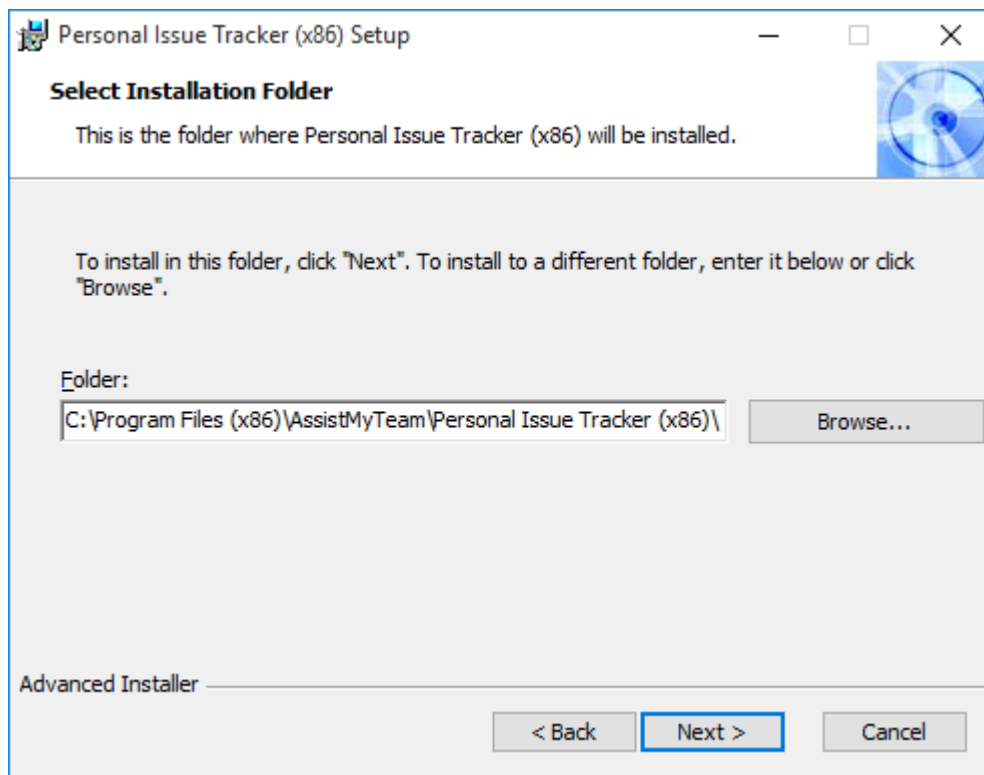
I) Files Installation

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Step 1. Run the *IssueTrackerPersonalSetup_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.

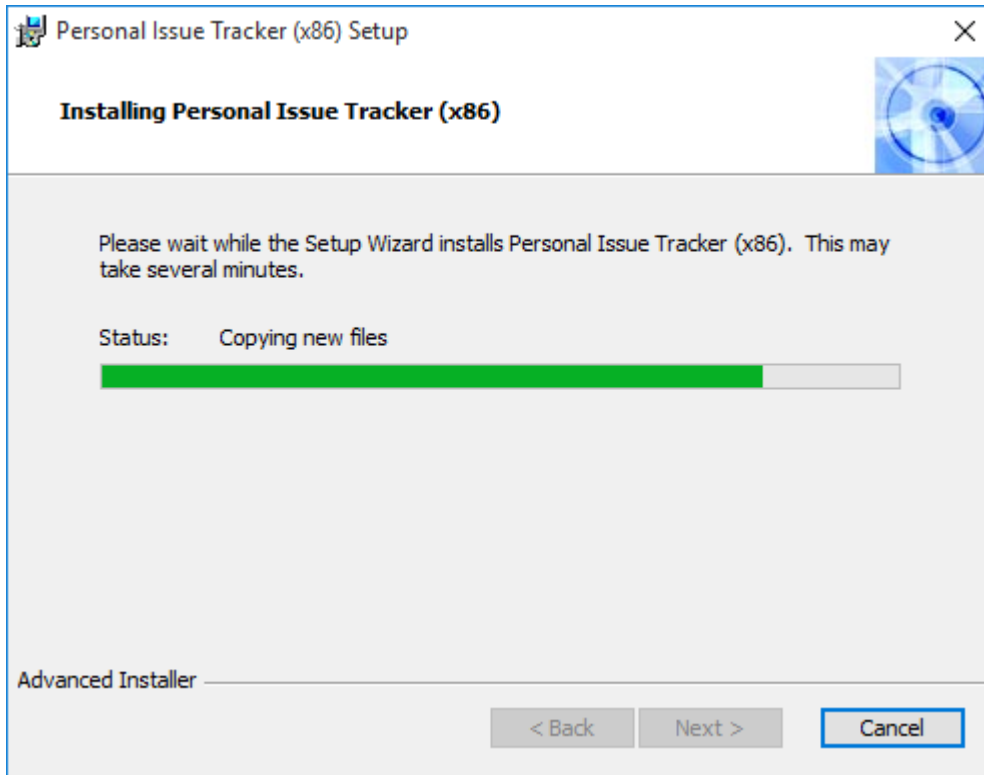


Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.

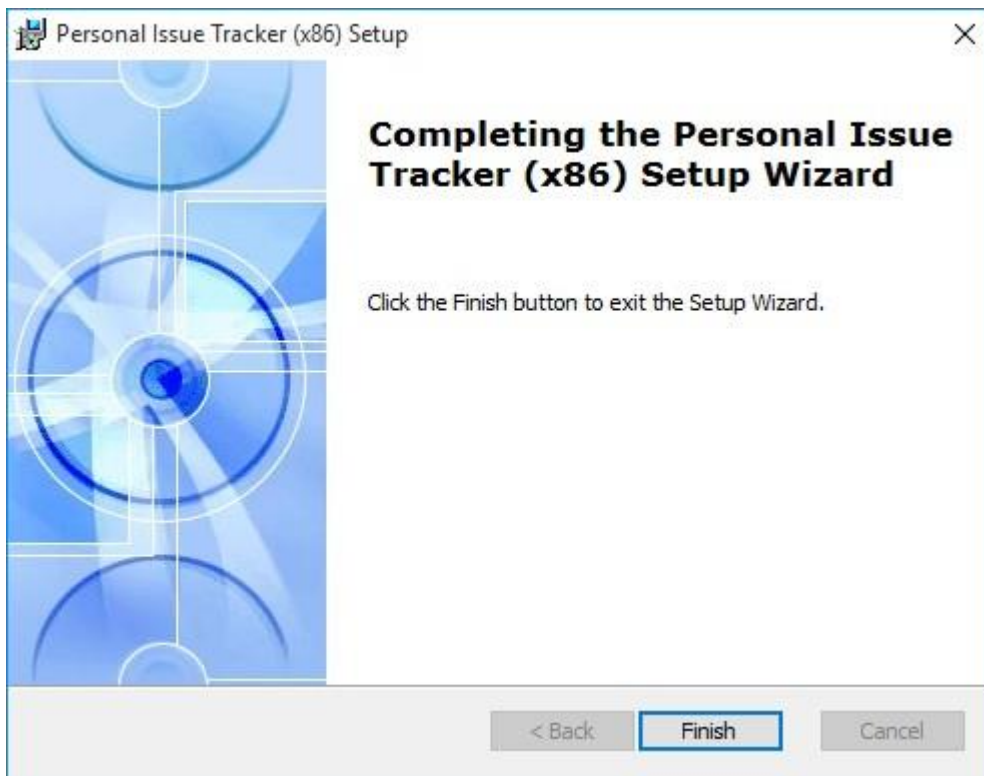


Step 3. It just takes a few minutes to complete the whole copying process

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Step 4. Click 'Finish'. This ends the files installation process in your system.



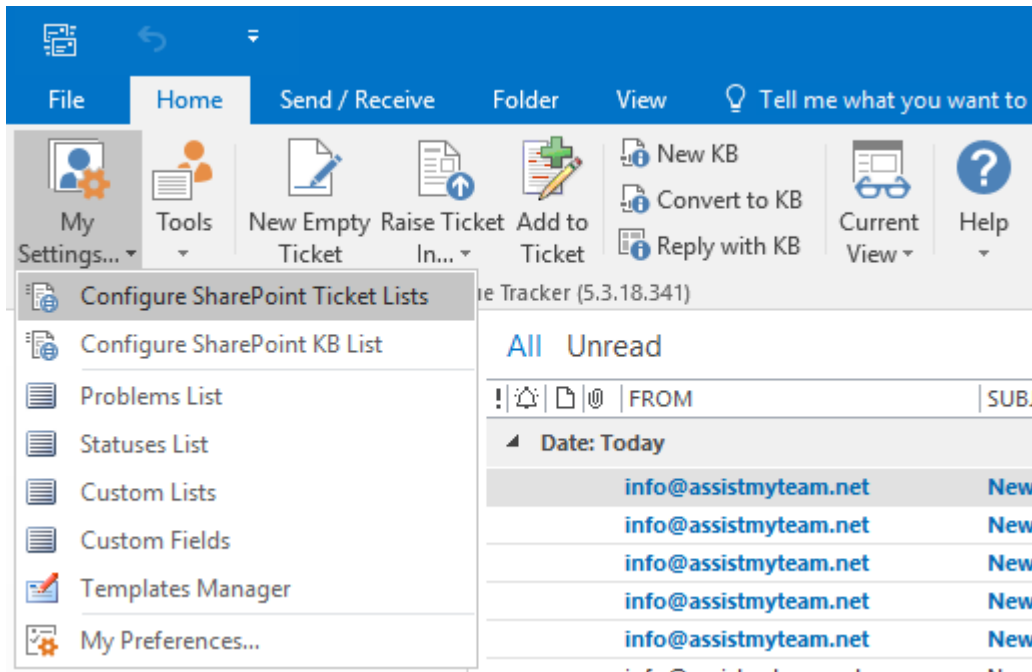
Now start Microsoft Outlook. If the Issue Tracker add-in installation was successful, you will see a toolbar or ribbon with the title 'Personal Issue Tracker' toolbar in Outlook.

II) Choose SharePoint Ticket Lists

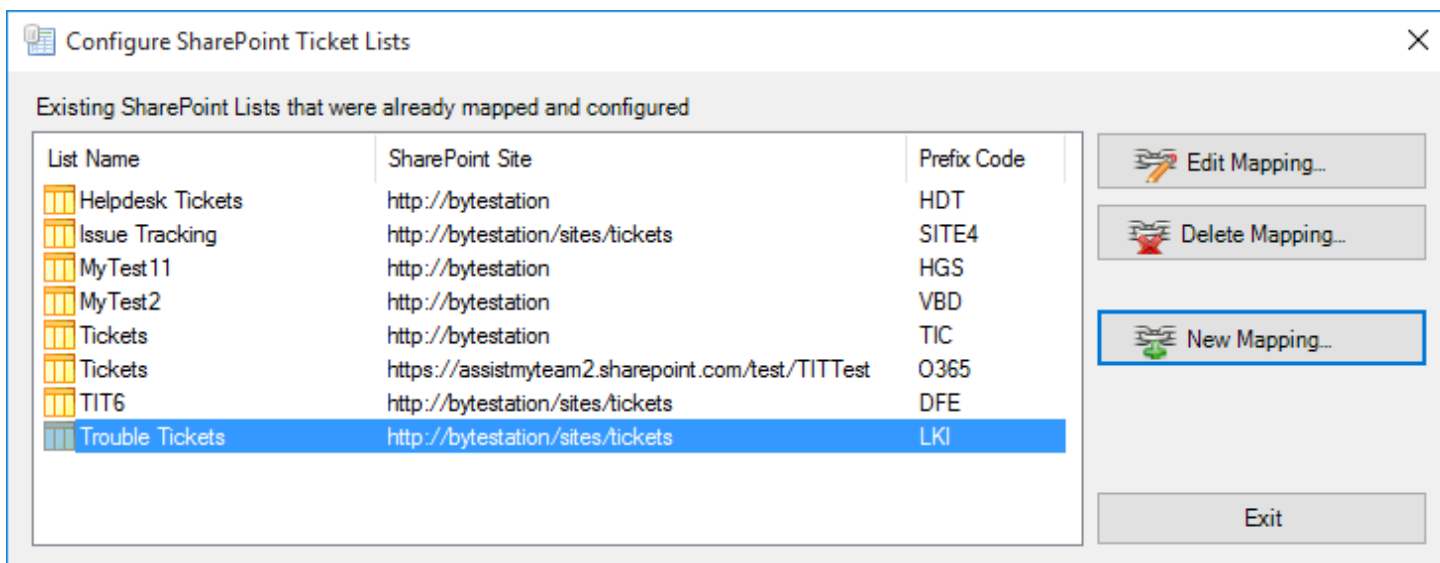
Before you can start raising trouble tickets from Outlook emails to SharePoint, you need to choose the destination SharePoint lists, to which the captured ticket metadata from Outlook will be stored as a list item.

To configure a new SharePoint list and map fields with the Outlook mails, go to **My Settings menu > 'Configure SharePoint Ticket Lists'**.

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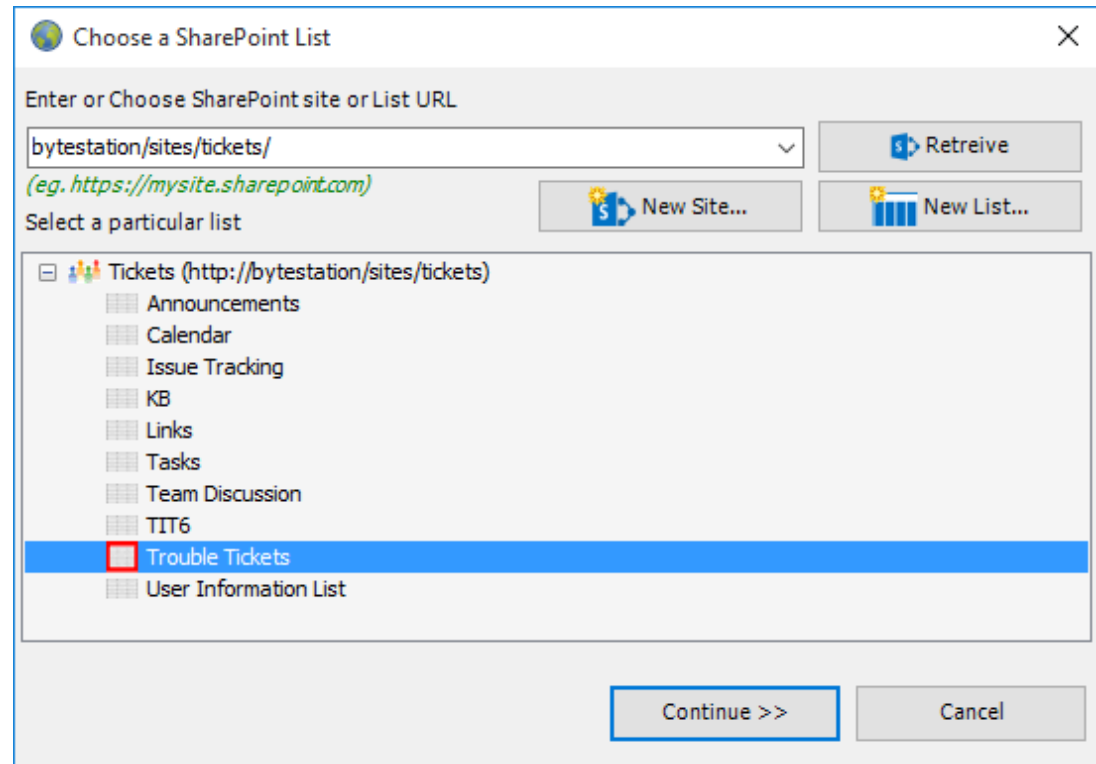
Here is a listing of all SharePoint lists that are configured for storing trouble tickets. These chosen SharePoint lists would be deployed to your Outlook (i.e., to allow you to raise a ticket from an email to one of these SharePoint list).



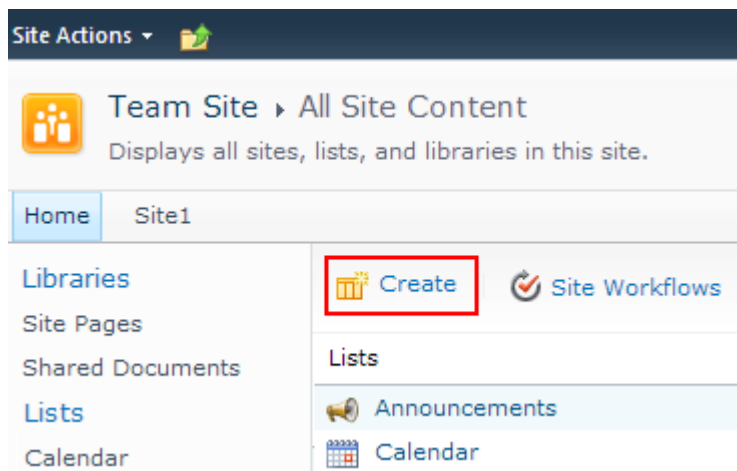
To configure a new SharePoint ticket list and perform fields mapping, click 'New Mapping...' button.

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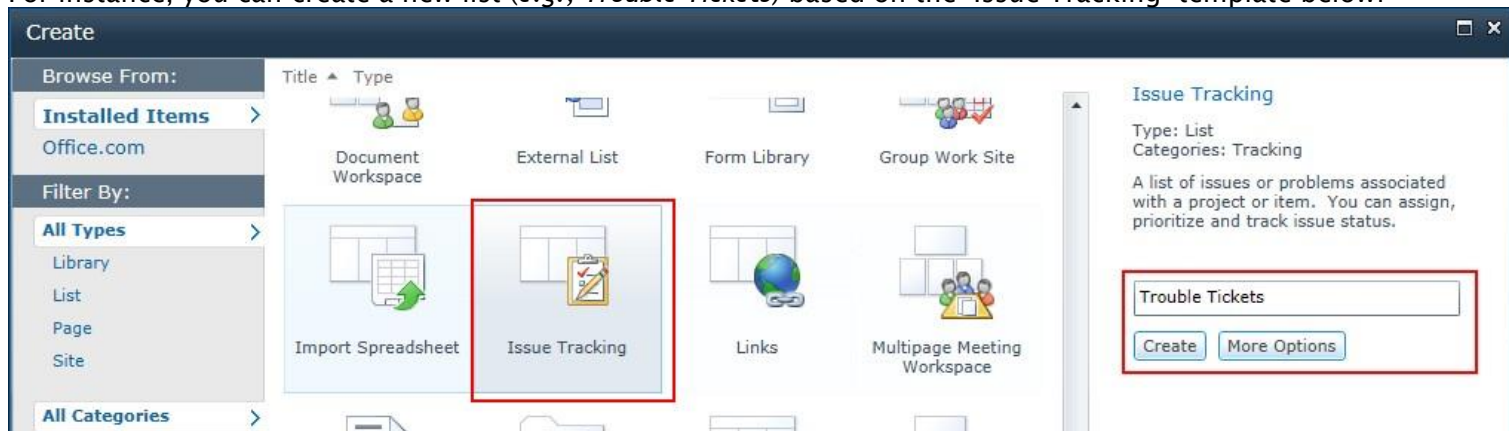
You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list.



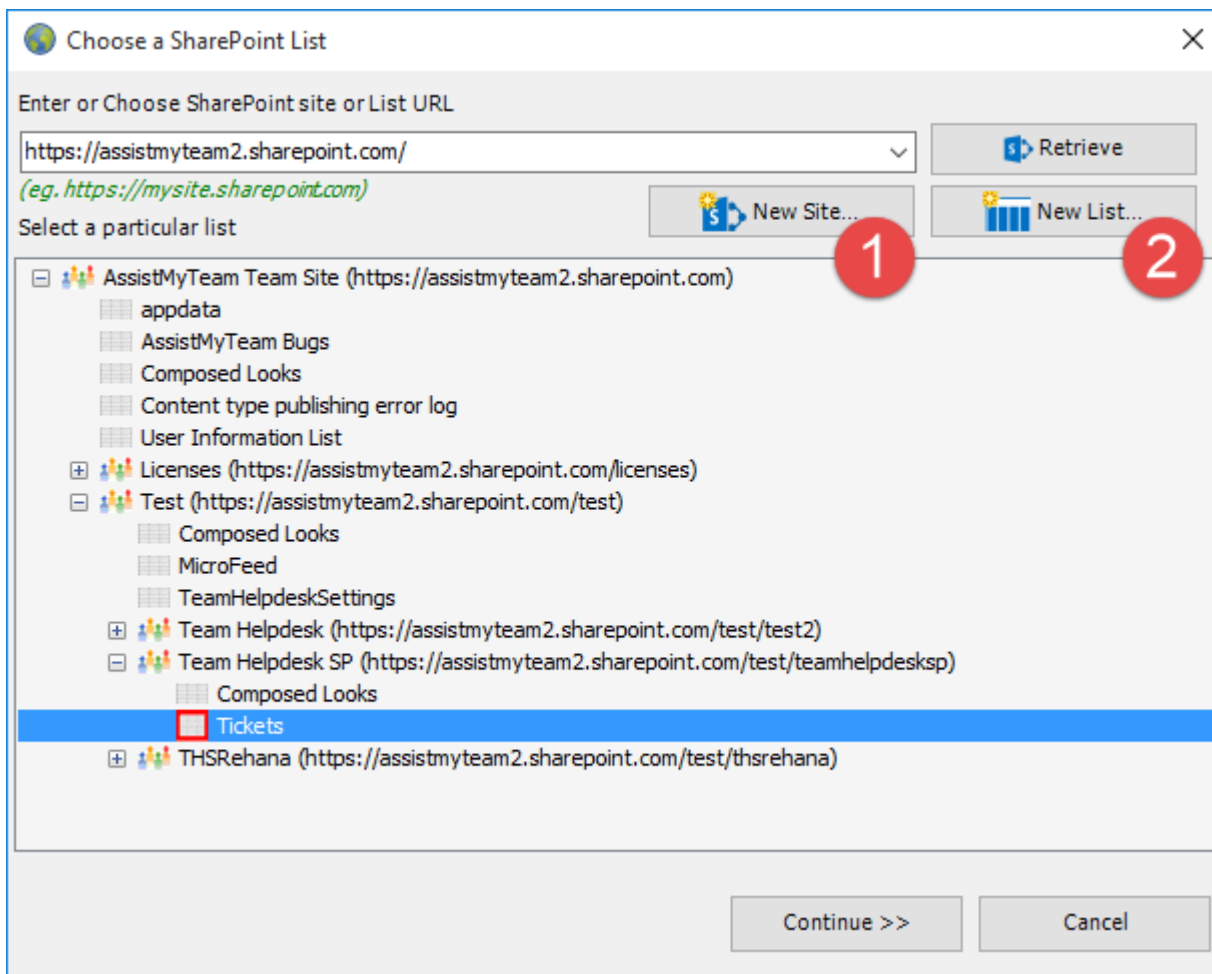
You can choose re-use existing SharePoint lists or create new one for this purpose. Ideally, we recommend that the SharePoint lists you will choose for used with Issue Tracker addin were derived from the inbuilt 'Issue Tracking' template in your SharePoint. This is because such SharePoint list already comes with predefined helpdesk fields and views which can be directly ported with Issue Tracker addin's functionality.



For instance, you can create a new list (e.g., *Trouble Tickets*) based on the 'Issue Tracking' template below:



And then choose this newly created SharePoint list (e.g., *Trouble Tickets*) or any other existing lists from the mapping tool and click 'Confirm'.



Instead of creating the new site/list in the SharePoint using your web browser, you can also choose to create – new site or list directly from the add-in.

1 New Site – Create a new site directly under the chosen parent site to be used exclusively for Issue Tracker add-in. By default, the site will be created as a blank site, unless a different site template is specified.

2 New List – You can choose to create a new list directly under the chosen site. By default, the list would be created using the 'Issue Tracking' template available in your SharePoint. However, you can change the template

from the drop down.

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After choosing a destination SharePoint list (either by creating a new one, or by selecting an existing list), you can proceed to start mapping the fields between Outlook and SharePoint.

Through the **mapping tool**, you can choose which fields from the emails in Outlook are to be extracted and published to the SharePoint ticket list, and perform the mapping between these chosen fields of the emails to that of the SharePoint ticket list.

	Outlook Field	Data Type	
13	Caller Name	Text	Manager Name
14	Caller Mobile	Text	CallerMobile
15	Caller Address	Text	CallerAddress
16	Caller Phone	Text	Caller Phone
17	Caller Company	Text	CallerCompany
18	Caller Email	Text	Tech Emails
19	Problem Category	Choice	Category
20	Problem Type	Choice	Caller Company
21	Problem Status	Choice	Issue Status
22	Time Spent	Numeric	TimeSpent
23	Assigned To	User	AssignedTo
24	Due Date	Date/Time	Due Date

A mapping is nothing but an association between an Outlook field (e.g., *subject of the mail item*) to a specific SharePoint list field (e.g., *Title*). You have complete control over which data goes to the SharePoint list from Outlook. In the mapping dialog box (above), the first column lists all the email fields as available in Outlook. The second column displays the data type of the field. In the last column, there is a drop-down list on each row,

consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field.

For example, in the screenshot above, Outlook field '*Problem Category*' is mapped to SharePoint field '*Category*'.

You can choose to auto create the required fields in the SharePoint list as well as auto-map the fields between the helpdesk and SharePoint.

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1

For mandatory unmapped fields – Click this option under the '*Auto Create & Map fields*' menu to create the mandatory helpdesk fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red. The following fields are mandatory to complete the mapping – *Subject, Issue Conversation, Caller Name, Caller Email, Assigned To, Problem Category, Problem Type, Problem Status, Due Date, Resolved, Resolved Date*.

2

For all unmapped fields – Click this option under the '*Auto Create & Map fields*' menu to create all the helpdesk fields that have not been mapped yet in the chosen SharePoint list and complete the mapping automatically. If the chosen SharePoint list have any matching existing fields, instead of creating new ones, the add-in will try to use them to map with the helpdesk fields. For instance, if the chosen SharePoint list was created based on the '*Issue Tracking*', the list already contains predefined fields such as Title, Due Date, Description, Assigned To, Issue Status etc.

3

For the following fields – Click this option under the '*Auto-Create & Map fields*' menu to choose specific helpdesk fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.

Choose Outlook Fields...

Choose helpdesk fields for which corresponding new SharePoint fields would be created

- ☐ Caller Name
- ☐ Caller Mobile
- ☐ Caller Address
- ☐ Caller Phone
- ☐ Caller Company
- ☐ Caller Email
- ☐ Problem Category
- ☐ Problem Type
- ☐ Problem Status
- ☐ Time Spent
- ☐ Assigned To
- ☐ Due Date
- ☐ Rate
- ☐ Resolved
- ☐ Rejected
- ☐ Resolved Date
- ☐ Response Date
- ☐ First Response Time
- ☐ Service Level
- ☐ Completed By
- ☐ States
- ☐ Support Region
- ☐ Asset ID
- ☐ Contractor Name
- ☐ Cost Center
- ☐ Order Note
- ☐ Premium Customer
- ☐ Quantity Ordered
- ☐ Reference Number
- ☐ Ship Date
- ☐ Issue Conversation

Confirm

Cancel

4

For 'Caller Name' field, you can further specify which SharePoint data type will be used to store the caller information contained in the case in Outlook. For instance, you can choose if the SharePoint caller name field will store the info as a **SharePoint user/group** type (assuming the caller exists as a user in SharePoint), or as a **plain text**. By default, the 'Caller Name' field is set to be used and mapped to a SharePoint text field.

11	Mail - Sent On Behalf Of Name	Text	
12	Mail - To	Text	
13	Caller Name	Text	
14	Caller Mobile	User	
15	Caller Address	Text	

5 For 'Assigned To' field, you can also specify which SharePoint data type will be used to store the technician information contained in the case in Outlook. For instance, you can choose if the SharePoint Technician field will store the info as a **SharePoint user/group** type (assuming the technician exists as a user in SharePoint), or as a plain text. By default, the 'Assigned To' field is set to be used and mapped to a SharePoint User/Group field.

20	Problem Type	Choice	Caller Company
21	Problem Status	Choice	Issue Status
22	Time Spent	Numeric	
23	Assigned To	User	
24	Due Date	User	Due Date
25	Rate	Text	
26	Resolved	Yes/No	Resolved

Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the helpdesk outlook fields.

Create New SharePoint Field - on the fly

In the drop-down list of the SharePoint field, you will also notice that there is an item '[NEW LIST FIELD]'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePoint site.

	Outlook Field	Data Type	SharePoint Field
13	Caller Name	Text	
14	Caller Mobile	Text	[NEW LIST FIELD]
15	Caller Address	Text	Title
16	Caller Phone	Text	Tech Emails
17	Caller Company	Text	Origin
18	Caller Email	Text	CallerAddress
19	Problem Category	Choice	CallerCompany
20	Problem Type	Choice	Caller Mobile
			Caller Phone
			Category
			Caller Company

Field Name

Specify a unique name for the new field!

OK

Cancel

CallerName

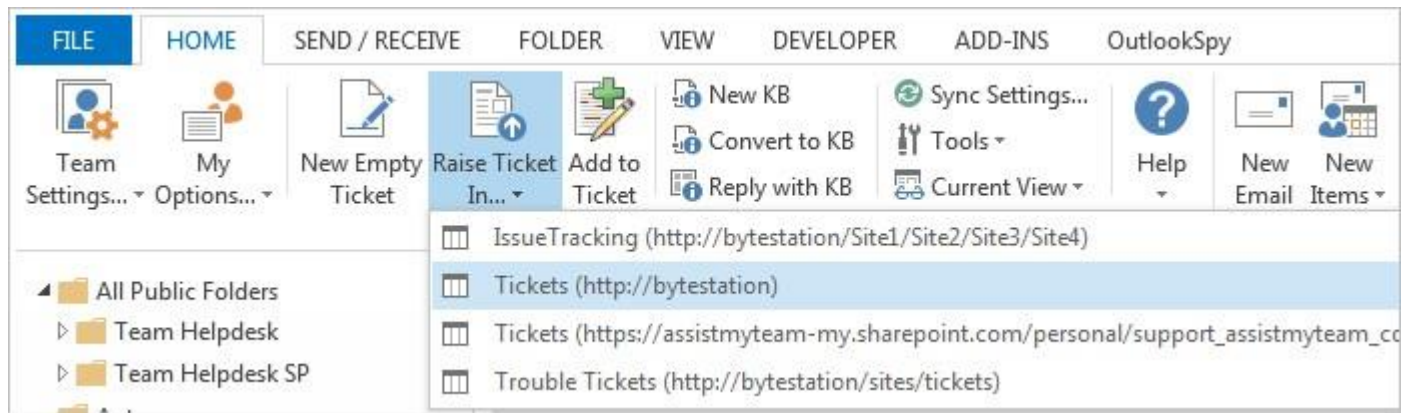
Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.

The new SharePoint field will have the same data type as that of the corresponding Outlook field.

	Outlook Field	Data Type	SharePoint Field
13	Caller Name	Text	CallerName
14	Caller Mobile	Text	Caller Mobile
15	Caller Address	Text	CallerAddress
16	Caller Phone	Text	Caller Phone
17	Caller Company	Text	CallerCompany

If you have added multiple SharePoint ticket lists in Issue Tracker add-in, you will notice that the 'Raise Ticket in' drop down menu shows all of them. You can then simply choose the destination SharePoint list to which a new

ticket will be raised from the selected email in Outlook.



Through the Issue Tracker administrator console, you can define, map and link any number of SharePoint lists from multiple sites so that, you can have a choice to choose a particular SharePoint list of interest to which new tickets from their emails can be raised from their Outlook.

SharePoint Authentication

If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint. However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you to enter credential.

Connect to 'assistmyteam2.sharepoint.com/test'.

Login

SharePoint Site URL: <https://assistmyteam2.sharepoint.com/test/>

User Name:

Password:

Domain: Optional

Authentication Mode:

ADFS Server: Optional
e.g., sts.company.com

☒ Remember

Check '**Remember**' so that Issue Tracker add-in can use the same credential to logon to the SharePoint site in subsequent connection.

You can also specify the authentication mode that is used by your SharePoint to allow connection to it. For instance, if your SharePoint is configured for Windows authentication, choose '**NTLM**'. If your SharePoint site is secured with ADFS, you can also specify the STS site URL under the ADFS server to get the authorization token.

If the site uses a form-based authentication, then choose '**Forms**' whereas if it uses a claimed based authentication (for Office 365 SharePoint Online), choose '**Office 365**'.

What SharePoint permissions is required?

You should have at least '**Contribute**' permission on the chosen SharePoint lists to raise new tickets from Outlook.

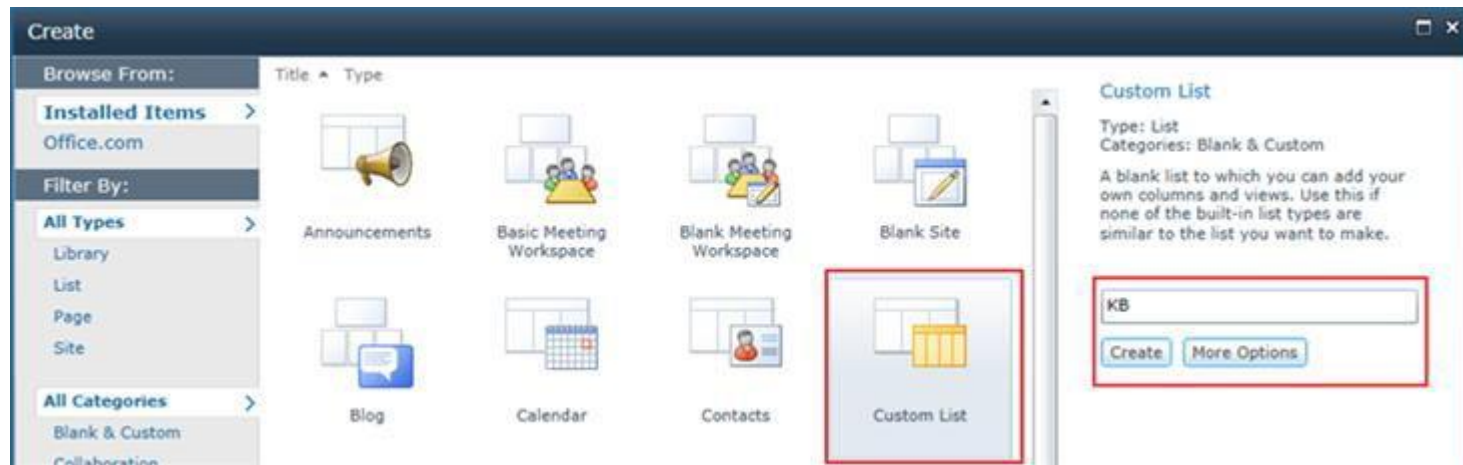
You can use any SharePoint version starting with SharePoint 2010 to the latest SharePoint 2016. You can also use Office 365 SharePoint Online too.

III) Choose SharePoint KB List

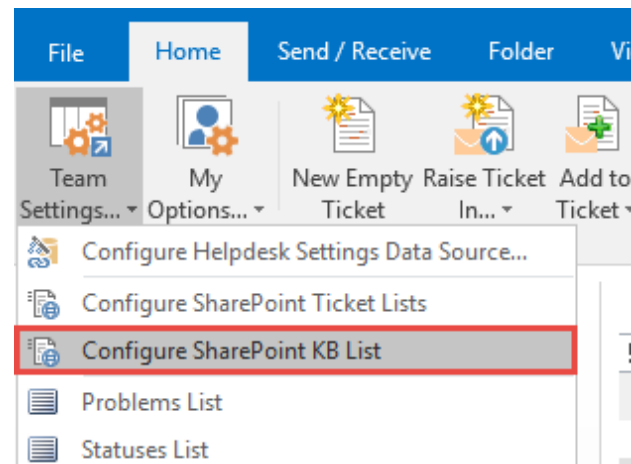
Before you can start creating and using KB articles, the knowledge base module needs to be first configured and mapped with a SharePoint list. For KB mapping, you can use a simple custom SharePoint list as it does not require that many fields.

For instance, you can use the ‘Custom List’ template to create a new SharePoint list ‘KB’ to store the KB articles and link up with Issue Tracker add-in.

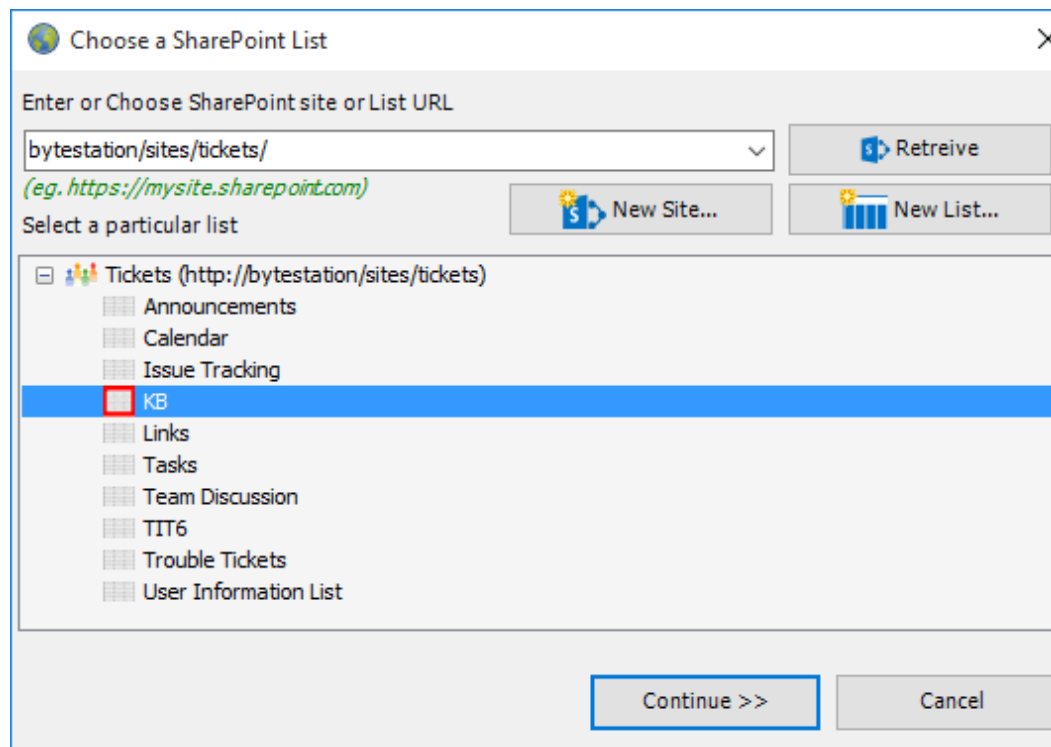
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To configure a new SharePoint list for use for storing KB articles, go to **Team Settings** menu > ‘Configure KB SharePoint List’.



You will be prompted to enter the SharePoint site URL, and it would allow you to choose an existing SharePoint list to be used as the KB repository. If you want to use a new list, click ‘New List...’ button to create one directly. You can also choose to create a new sub-site and list directly from the dialog box by clicking the ‘New Site...’ button.

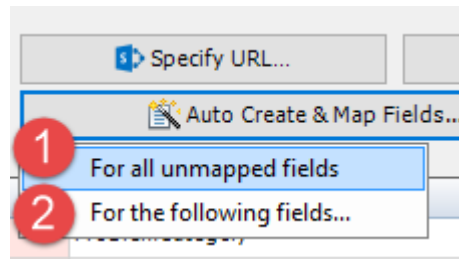


Now all that is left is to complete the mapping between the KB fields and the fields from the chosen SharePoint list.

There are essentially four (4) fields in KB to SharePoint mapping – *Problem Category*, *Problem Type*, *Question*, *Answer*.

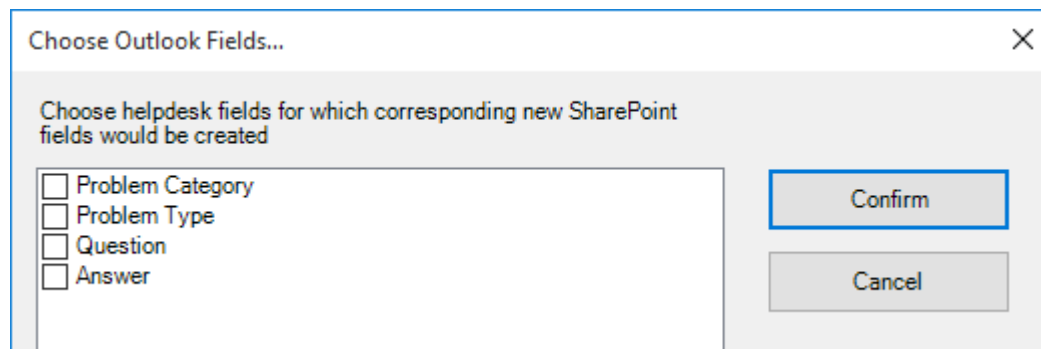
If the chosen SharePoint list does not have existing fields, this mapping feature will allow you to dynamically create new field of the relevant data type in the SharePoint list.

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1 For all unmapped fields – Click this option under the ‘Auto Create & Map fields’ menu to create all the KB fields that have not been mapped yet in the chosen SharePoint list and complete the mapping automatically. If the chosen SharePoint list have any matching existing fields, instead of creating new ones, the add-in will try to use them to map with the KB fields.

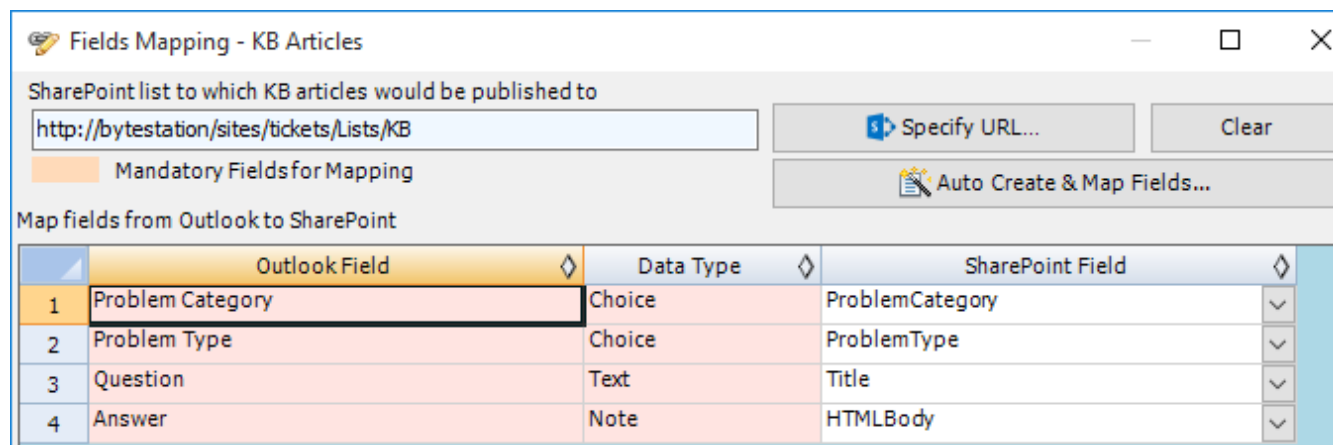
2 For the following fields – Click this option under the ‘Auto-Create & Map fields’ menu to choose specific KB fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.



Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the KB fields. Simply select the ‘NEW LIST FIELD’ from the corresponding field drop down in the ‘SharePoint Field’ column.

	Outlook Field	Data Type	SharePoint Field
1	Problem Category	Choice	Category
2	Problem Type	Choice	[NEW LIST FIELD]
3	Question	Text	Category
4	Answer	Note	

At any point of time, you can come back to this mapping tool, to edit or map to a different SharePoint field or list. Now, you are ready to document new KB articles, and use this collective knowledge base for solving repetitive support queries from your end users.



NOTE: *There are other administrative configurations that you would need to undertake. These options are available in the 'My Settings...' drop down menu of the Personal Issue Tracker toolbar or ribbon in Outlook.*

*For more references and helps on performing these administrative configurations, refer to the PDF Help Manual, which can be invoke from **the Issue Tracker toolbar or ribbon > Help > Help Topics**.*

You can also download the full PDF help manual directly from [this link](#).

---- End of Install Guide