

V6

# AssistMyTeam Issue Tracker

## For Outlook & SharePoint (team edition)

An add-in for Microsoft® Outlook® that enables support team to raise trouble tickets from Outlook emails to one or more SharePoint® lists, in a single click or, on the fly through automation.

# Help Manual



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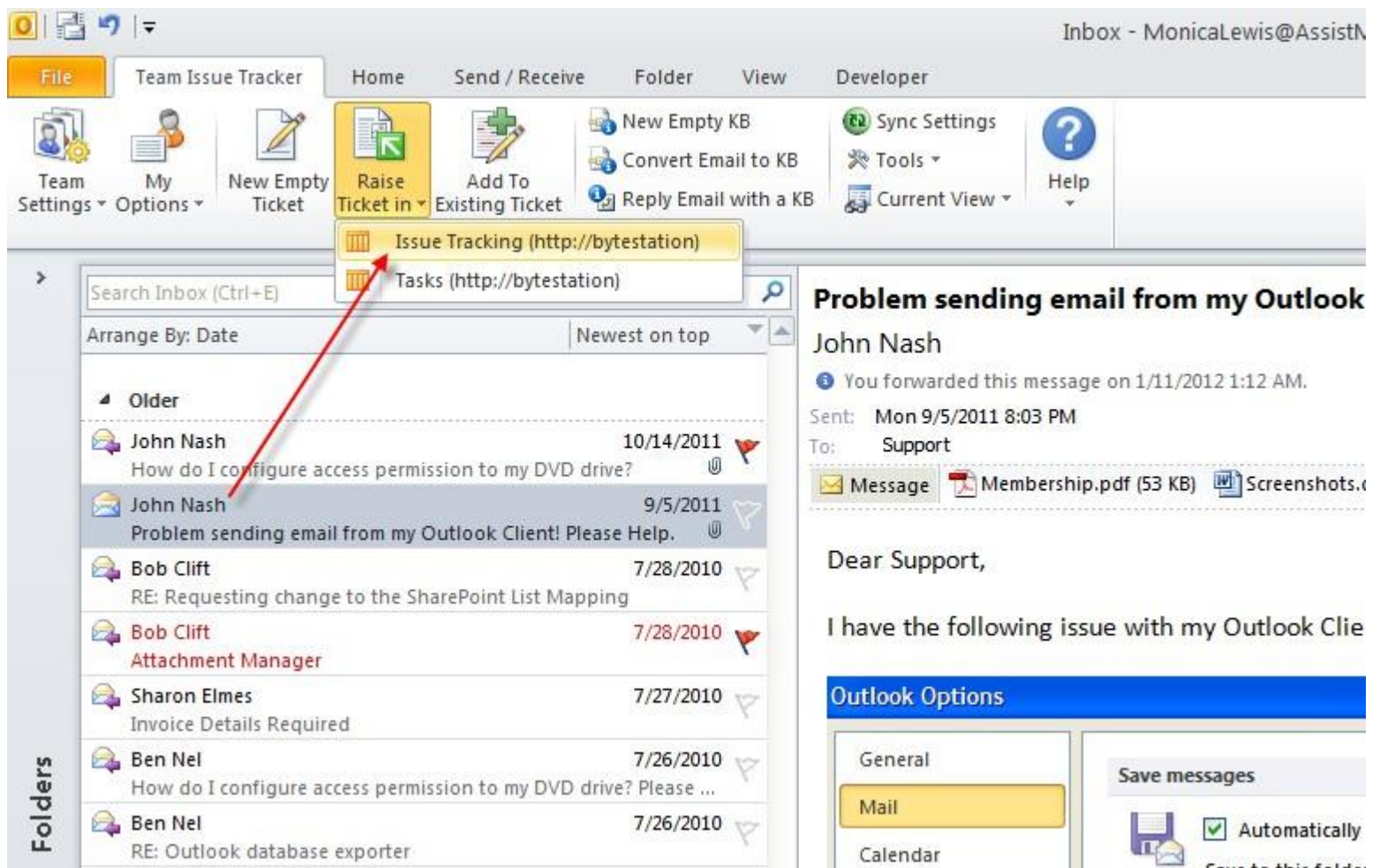
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## 1. Introduction

AssistMyTeam Issue Tracker leverages three of your existing investments in Microsoft – **Outlook, Exchange** and **SharePoint** for a consolidated incident ticket management in the organization. It provides an easy way for customer service staffs to collect ticket data from emails, assign technicians and problem areas, set due date and other custom metadata. And then use this information to generate trouble tickets in one of the administrators defined SharePoint lists, where these can be tracked and collaborated with other technicians and stakeholders.

*And because SharePoint is used for trouble tickets collection and collaboration, it is highly scalable. And because of users' familiarity with Microsoft Outlook and SharePoint, it requires no special training or skill sets, resulting in a high rate of user adoption in the organization.*



## Highlights

- ✓ Seamless integration with Microsoft Outlook and SharePoint
- ✓ Directly raises trouble tickets from emails in Outlook
- ✓ Export caller contacts, problem descriptions and attachments from emails to the SharePoint tickets
- ✓ Centralized helpdesk administration - Specify SharePoint lists and performs fields' mappings to be used by all technicians. Define drop down lists and streamline the ticket collection behavior
- ✓ Raise trouble ticket from your existing Outlook Contacts or users from Global Address List
- ✓ Automatically raise trouble tickets from incoming emails, assign technician and set due date
- ✓ Automatically track and add technician and caller email responses and replies to the SharePoint ticket
- ✓ Automatically send out notification emails to caller or technician based on helpdesk events
- ✓ Maintain a consolidated and hierarchical view of email communications in the ticket description
- ✓ Map and publish only those fields or metadata that you require
- ✓ Special Outlook views for organizing your published Outlook items
- ✓ Supports POP, IMAP, Exchange mailbox and public folders



## 2. Requirements

*AssistMyTeam Issue Tracker* is available right inside your Outlook as an add-in process. 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 *Issue Tracker for Outlook and SharePoint*:

### Requirements

|                                 |  |
|---------------------------------|--|
| <b>Windows Version</b>          | Windows 11, 10, 8, 7, Windows Vista. Both 32 and 64 bits are supported   |
| <b>Outlook Version</b>          | Outlook 2010, 2013, 2016, 2019, 2021 and 365 (32-bit and 64-bit)   |
| <b>SharePoint Version</b>       | WSS 2.0, 3.0, 4.0 (SharePoint 2010), MOSS 2007, 2010 or Higher. Office 365 and other Cloud based SharePoints are also supported. |
| <b>Microsoft .NET Framework</b> | 4.5 or above   |

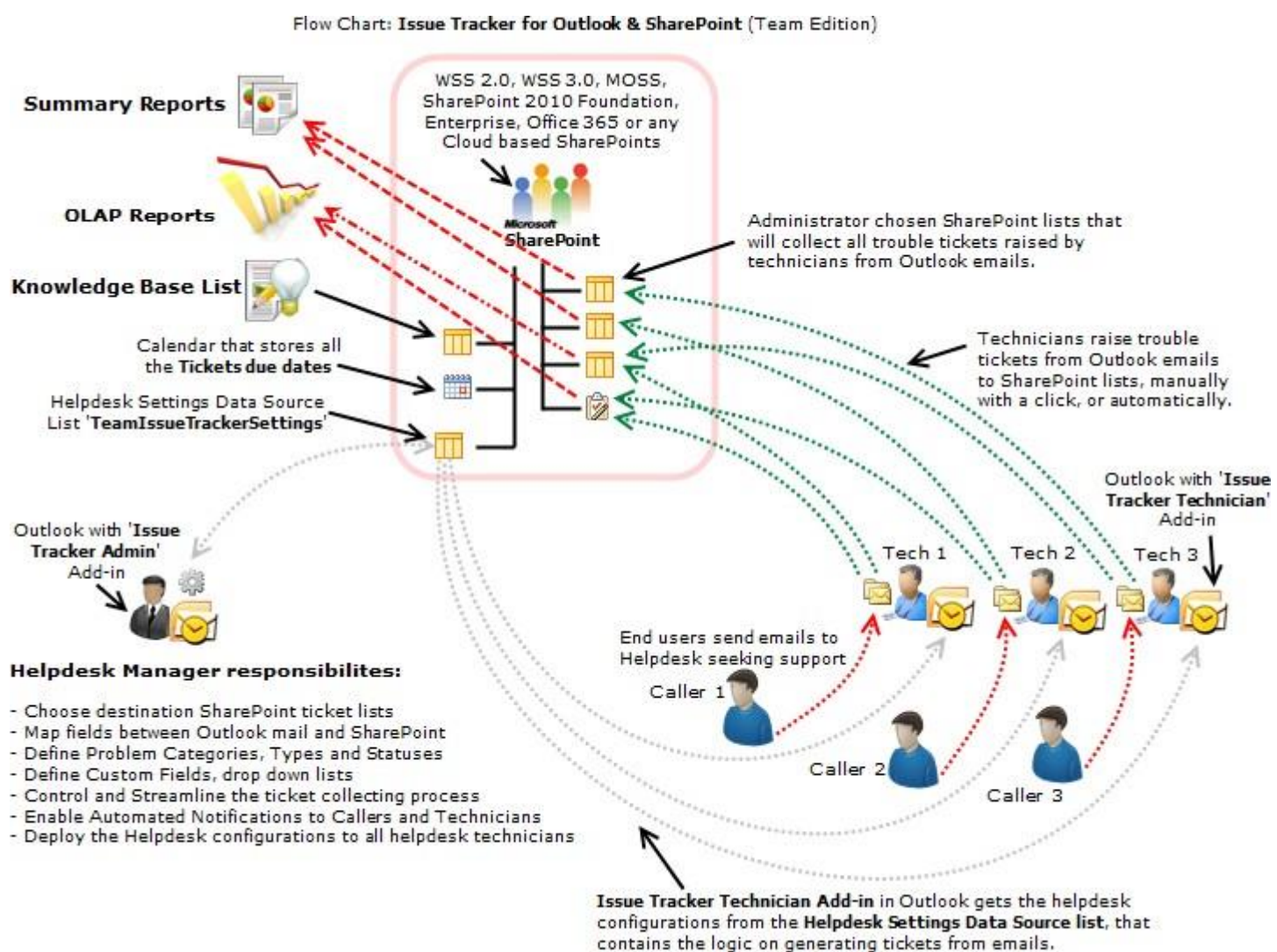




### 3. Purpose

Many organizations today are migrating their customer support mechanism to SharePoint, due to its relatively ease of access, collaboration and centralized storage and management features. However, the inbuilt issue tracking list template in SharePoint is only good for basic tracking requirement and lacks the automation and sophistication, to function as an effective helpdesk system. There is no direct and easy way to source the ticket information, say from your emails in Outlook, except to resort to copy-paste trick, which is time consuming and laborious, and not to mention, the precious human resources needed for data gathering.

Moreover, one of the important goals for a helpdesk is staying on top on the growing amount of support request emails from end-users. But without an organized and structured link between Outlook and SharePoint, caller and problem information from Outlook mails cannot be added or updated to SharePoint tickets in a timely manner. This can lead to delay in response time and even support requests falling through the crack. These limitations prevent many helpdesk teams from implementing an effective SharePoint based issue tracking system.



Issue Tracking System overcomes this limitation by extending your Outlook as an ideal platform to raise trouble tickets from emails to one or more SharePoint lists. With a click of a button in Outlook, it can analyze your emails and collect ticket specific information such as contact details and problem description.

## 4. Installation

AssistMyTeam Issue Tracker for Outlook & SharePoint is a groupware solution consisting of two portions – Admin and Technician install.

- **Admin install** is for managers and administrators, who would perform the global configuration of the helpdesk, choose and setup SharePoint lists, map fields between Outlook and SharePoint, configure ticket collection behaviors in Outlook etc.
- **Technician install** is for individual helpdesk staff that will be raising trouble tickets from emails in their Outlook to one or more of the Administrator chosen SharePoint lists.

Before you and your other users can start raising trouble tickets from Outlook emails to SharePoint, you need to install the admin tool (for configuring a centralized configuration) and the Technician tool. You can download it from [HERE](#).

*NOTE: We also have a MSI version of the installers for both the Admin and the Technician add-in. You can download these setups from the download page.*



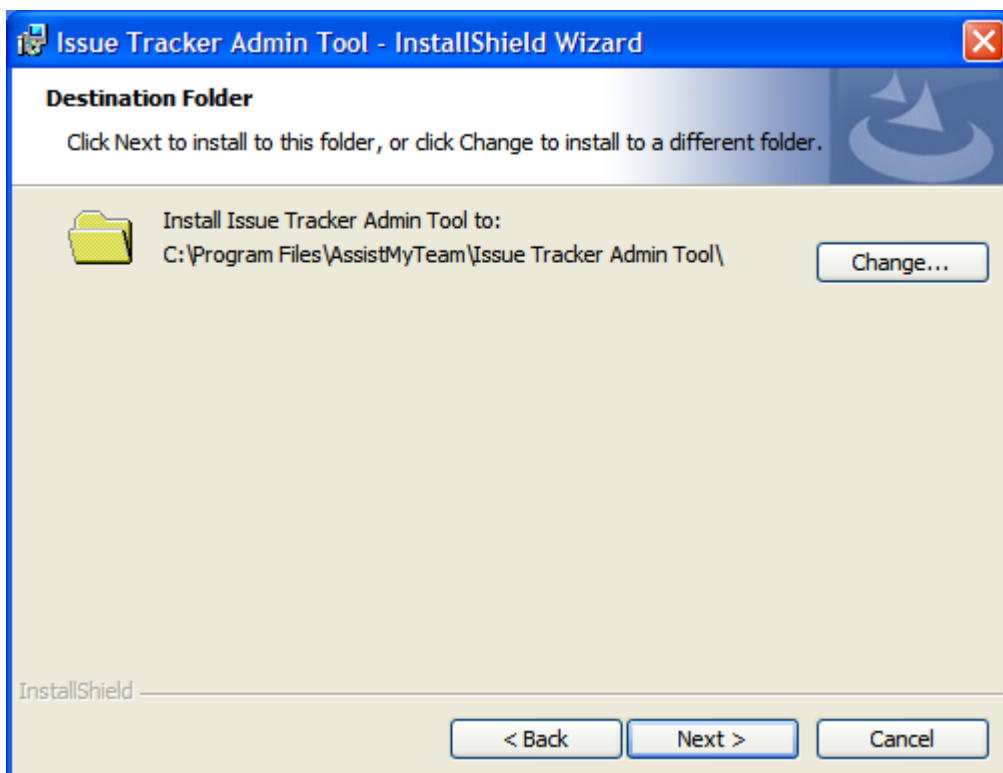
## 4.1 Admin Installation and Configuration

Step by step procedure is given below:

**Step 1.** Run the *IssueTrackerManagerSetup.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.



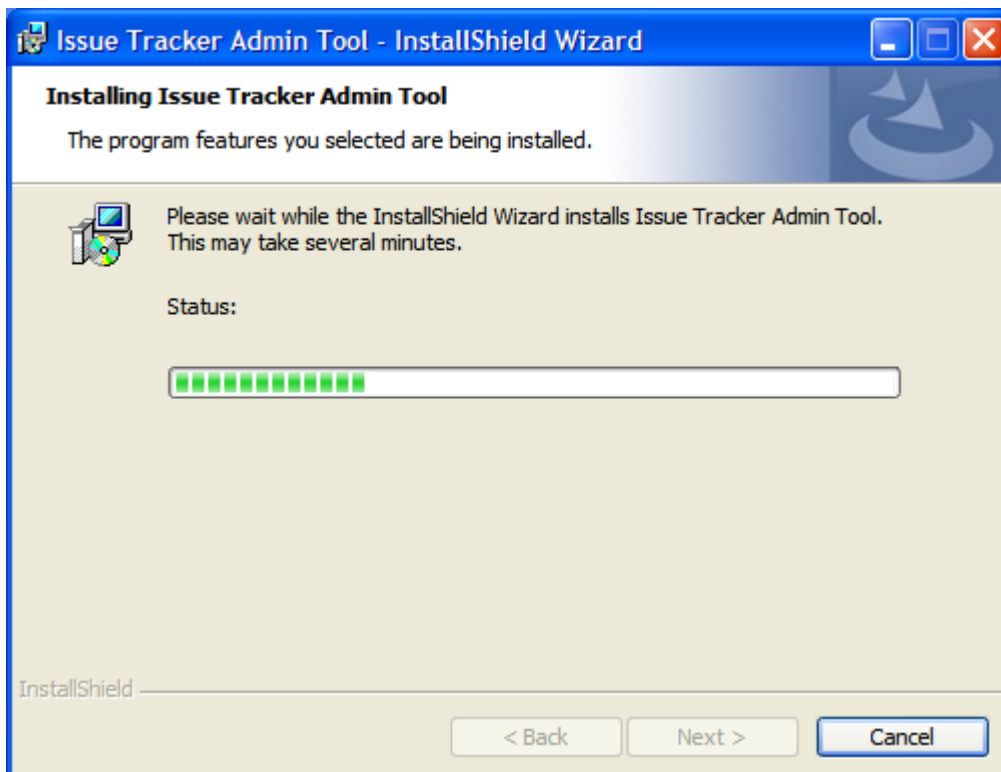
**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)



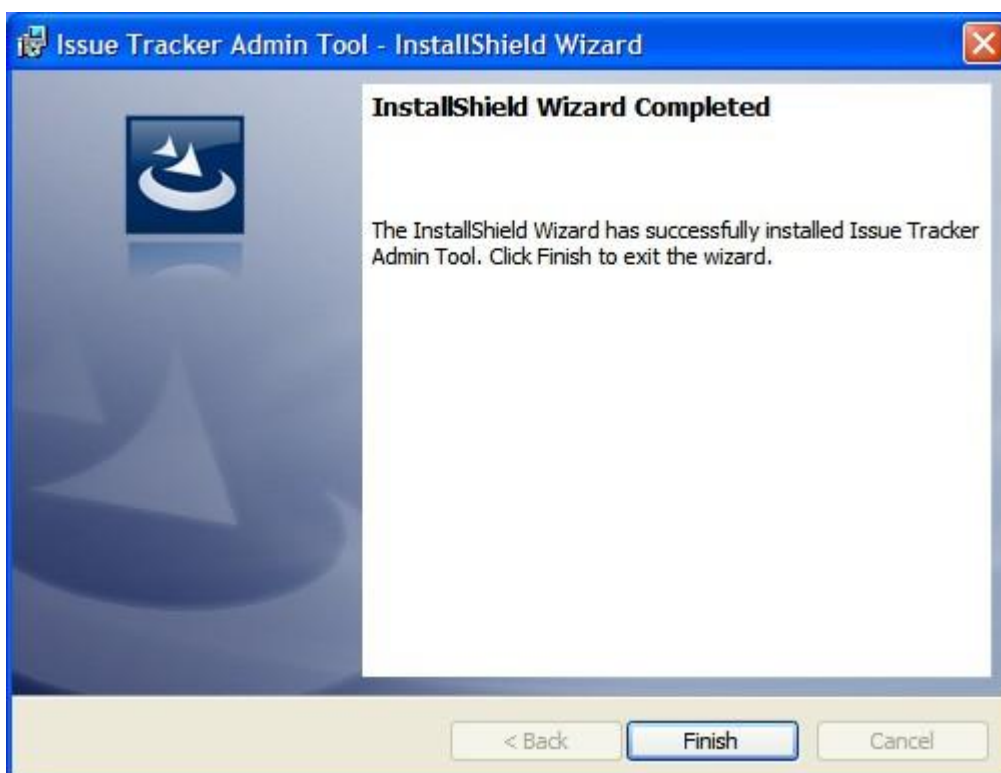
**Step 3.** Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process







**Step 4.** Click 'Finish' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



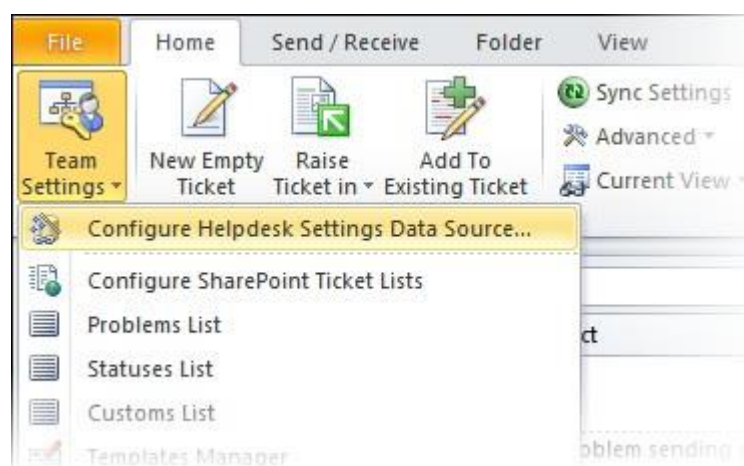
### 4.1.1 Administrative Configuration – setup helpdesk settings data source

The next step is to choose a SharePoint site, under which, a new list titled 'TeamIssueTrackerSettings' would be created, to store the metadata and mapping settings as performed by the administrator.

#### Why store the helpdesk settings in a special SharePoint list?

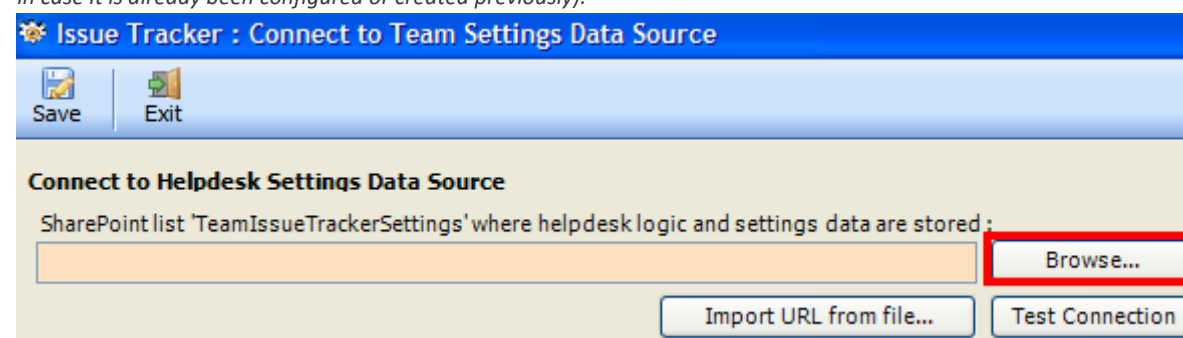
Because your helpdesk staffs can be scattered in different geographical locations, and might not have access to the company's local network remotely, using a network database or shared folder won't be feasible. Instead, in Issue Tracker system, the helpdesk configuration and settings data are stored in a special SharePoint list (having the name 'TeamIssueTrackerSettings') which is accessible to all helpdesk staffs, on the local network, WAN or via the WWW.

In short, this list will act as a **Helpdesk Settings data source**, and other technicians with their Issue Tracker User add-in would connect to it.

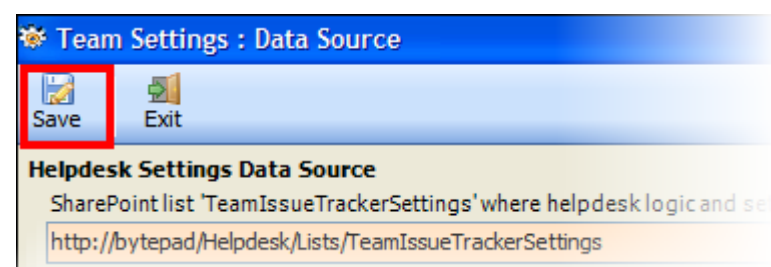
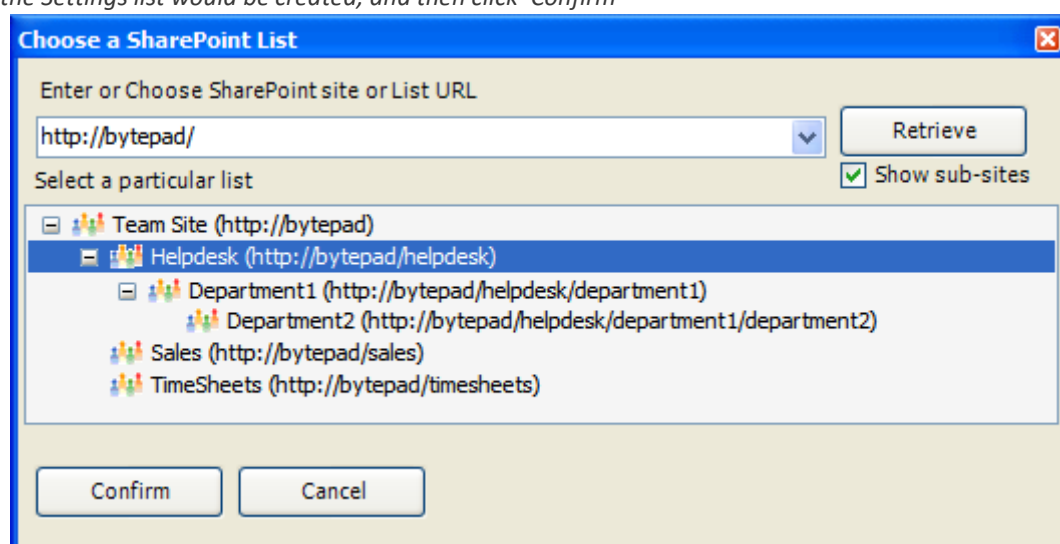


Start Outlook and you would be automatically prompted with the 'Helpdesk Settings Data Source...' panel. If it is not visible, you can invoke it from **Team Settings > Configure Helpdesk Settings Data Source...**

Click 'Browse...' to specify the SharePoint site where the 'TeamIssueTrackerSettings' list will be created (or located, in case it is already been configured or created previously).



Enter the SharePoint URL site to show all available sub-sites and lists. Select the particular site to which the Settings list would be created, and then click 'Confirm'



Once you click 'Save', this helpdesk settings list will be automatically created in the chosen SharePoint site, when the manager configures the admin tool the first time. Issue Tracker Technician add-in installed on the helpdesk staff's system would then connect to it and retrieve the helpdesk logic and settings data to the local system automatically.

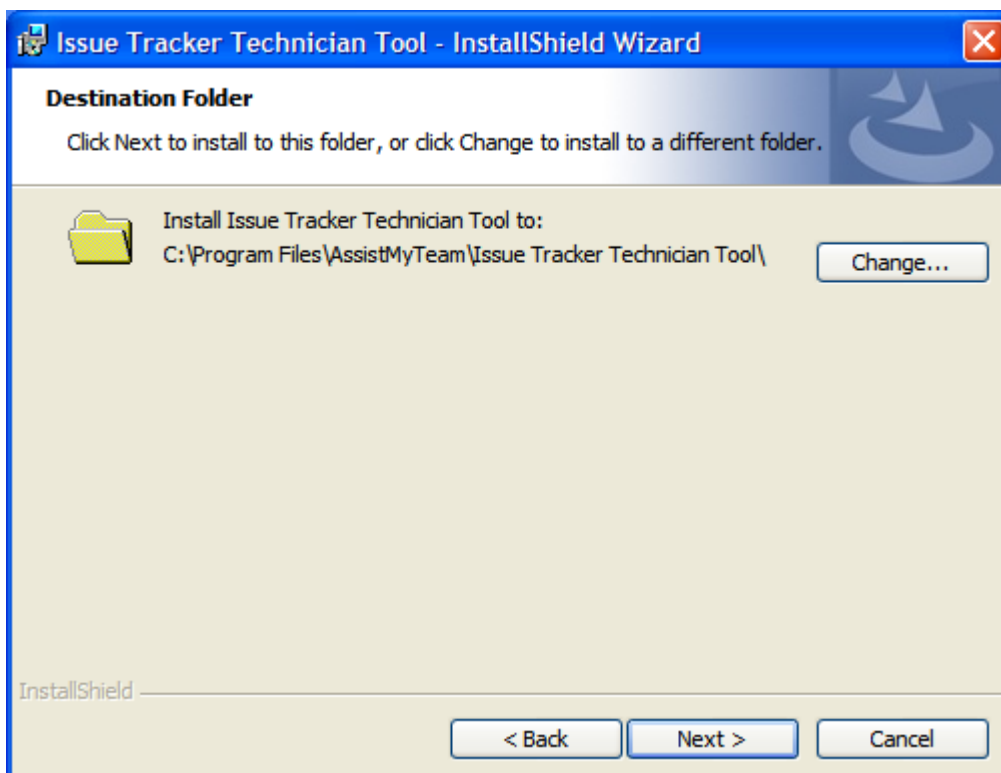
## 4.2 User Installation and Configuration

Step by step procedure is given below:

**Step 1.** Run the *IssueTrackerTechnicianSetup.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.

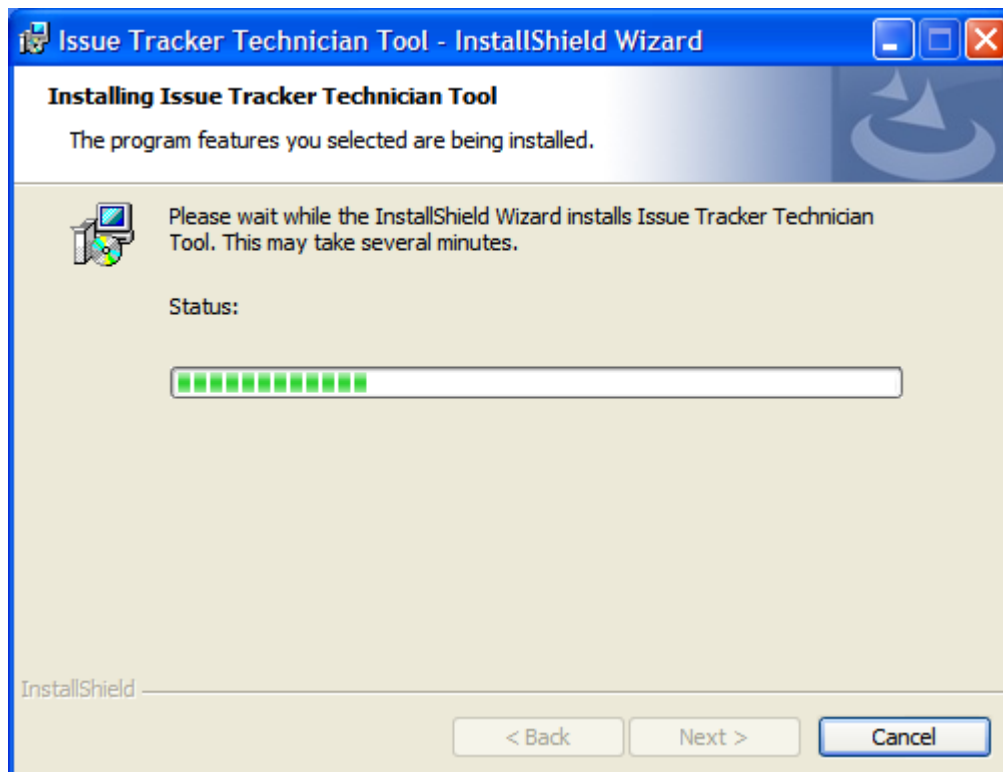


**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)

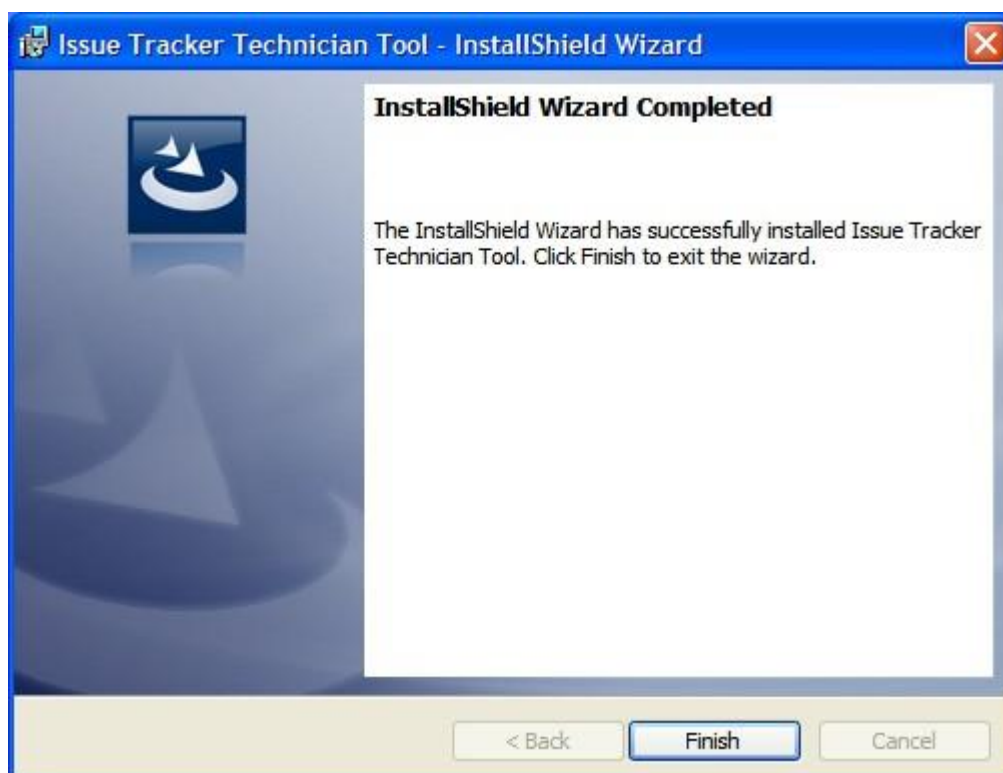


**Step 3.** Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process





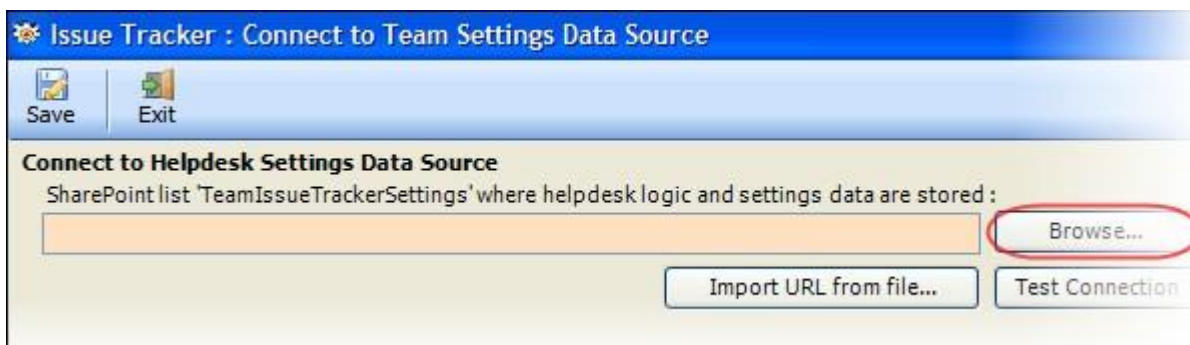
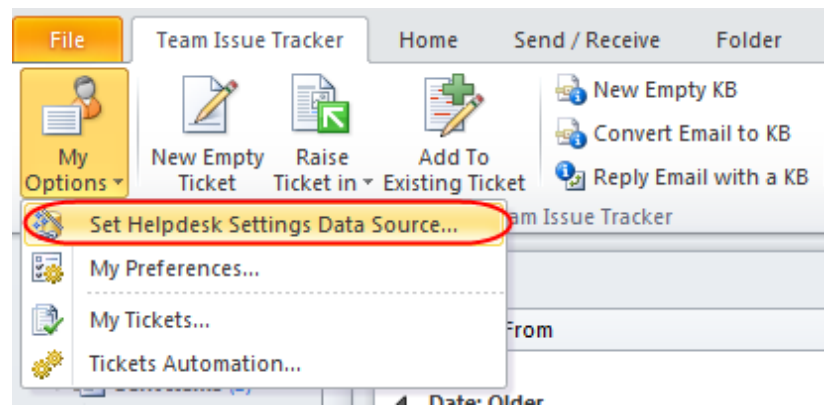
**Step 4.** Click 'Finish' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



### 4.2.1 Client Configuration – connect to helpdesk settings data source

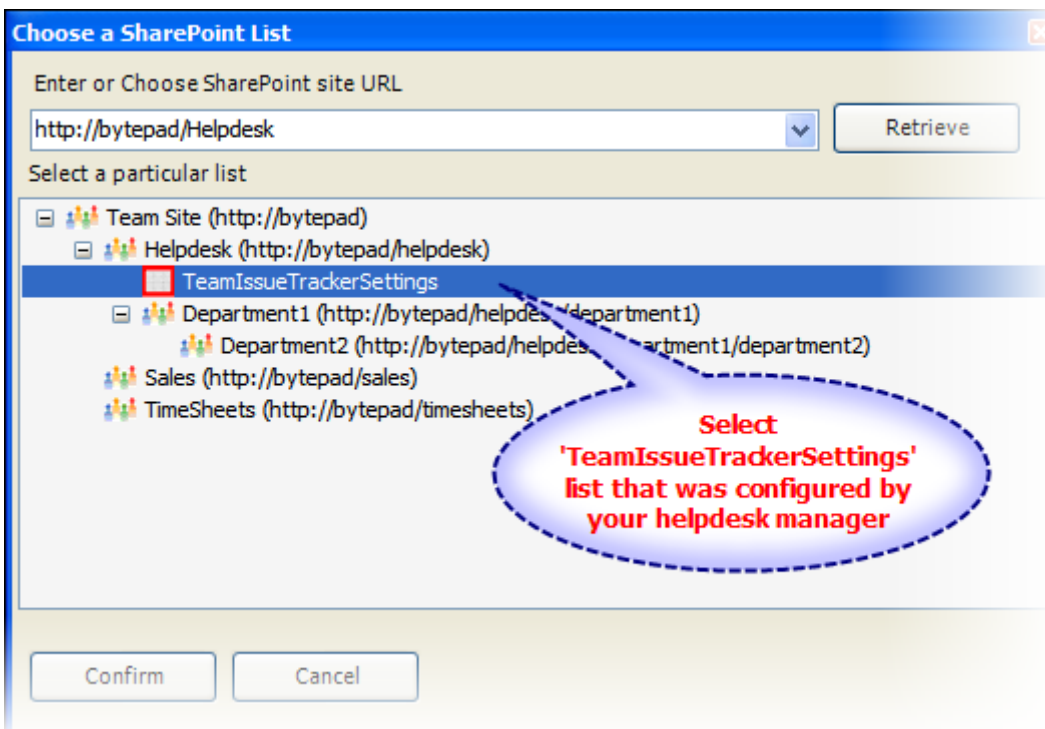
Once installed, the user will be prompted to specify the Helpdesk Settings Data Source, which is nothing, but a special SharePoint list having the title 'TeamIssueTrackerSettings', which was configured previously by the helpdesk manager.

If the 'Team Helpdesk Data Source' panel does not show up, you can invoke from the **My Options** menu > **Set Helpdesk Settings Data Source...**



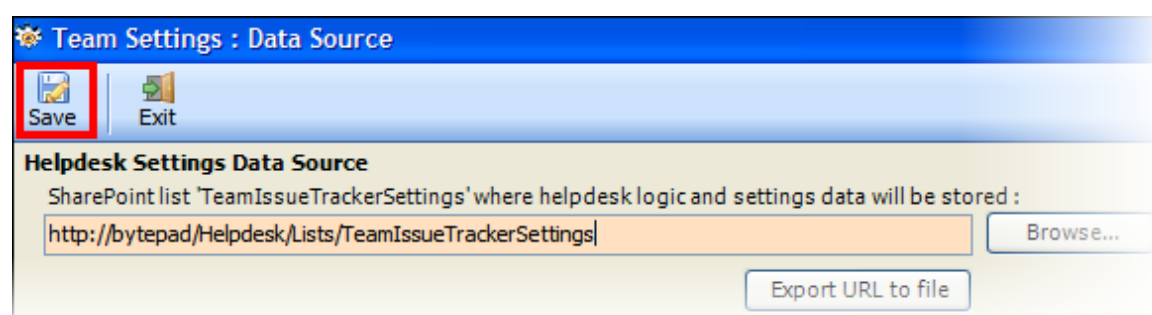
Click 'Browse...' to specify the SharePoint site where the 'TeamIssueTrackerSettings' list is located

Enter the SharePoint URL site to show all available sub-sites and lists. If your helpdesk manager had already configured Issue Tracker System with the admin tool, there would be a list 'TeamIssueTrackerSettings' that stores helpdesk configurations including destination SharePoint lists and their corresponding mapping settings. Select that list to maintain a permanent link between the Technician add-in and the Helpdesk data source.



**Screenshot:** The SharePoint list chooser dialog box, where it shows all the available sub-sites and their lists displayed in hierarchical order.

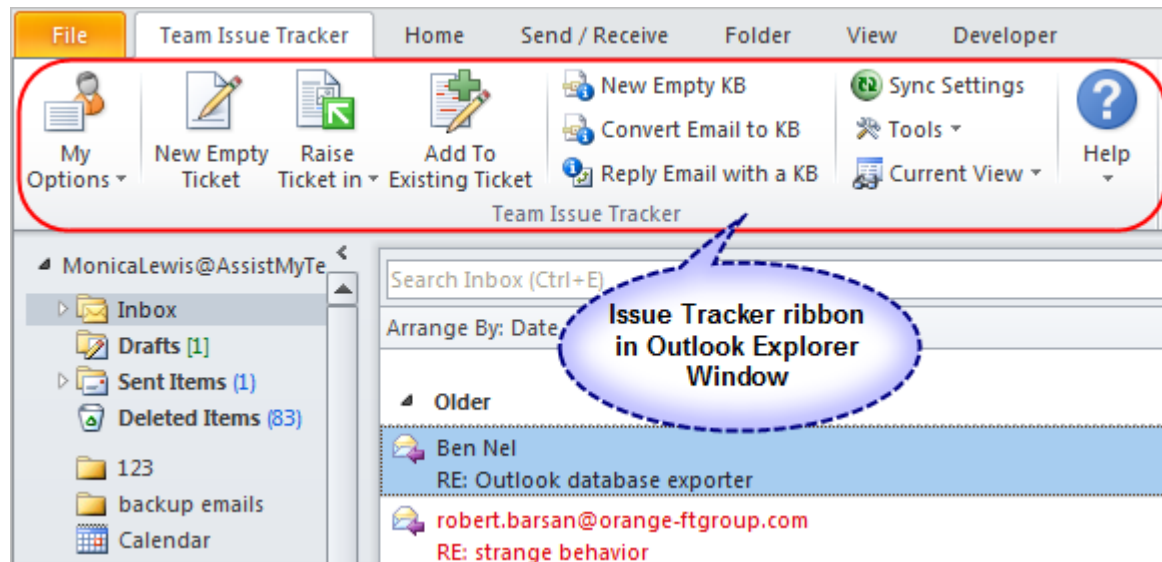
Now, click the Save button, to confirm the connection. Issue Tracker Technician add-in is now ready to raise trouble tickets from emails in Outlook to one or more of the administrator chosen SharePoint lists.



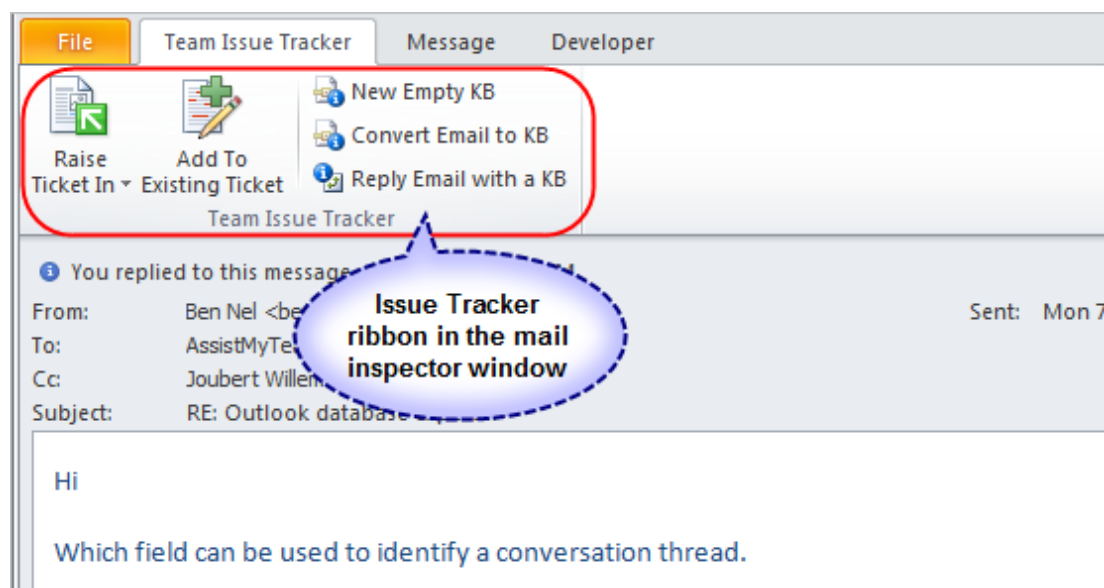


## 5.1 Raise a trouble ticket in a SharePoint list

When you navigate to any Outlook mail, appointment or contact, the Issue Tracker toolbar and ribbon are available in the Outlook explorer and inspector window.

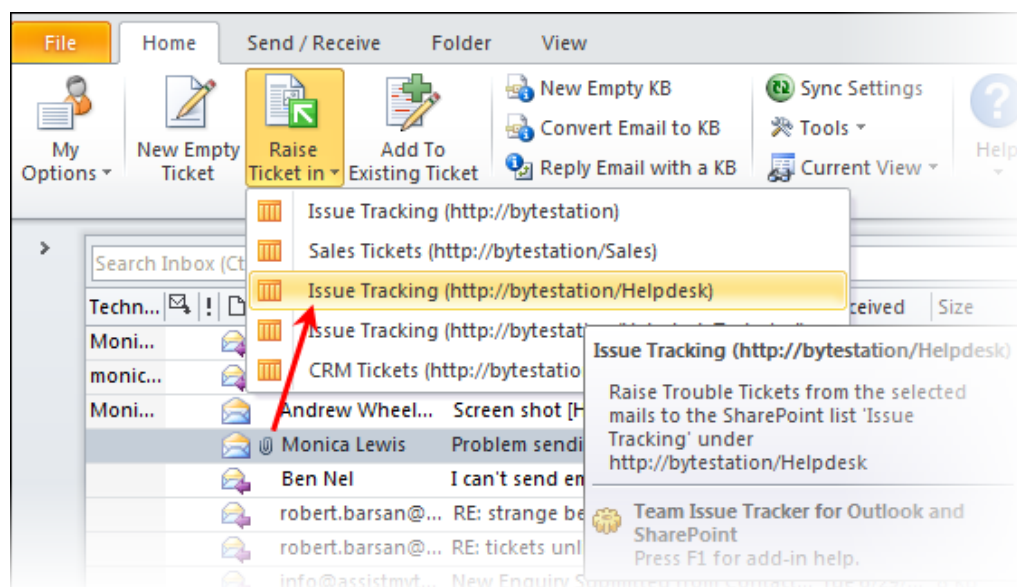


**Screenshot:** Issue Tracker specific ribbon available in the Home tab of the Outlook Explorer window.



**Screenshot:** Issue Tracker specific ribbon available in the Message tab of the Outlook mail inspector window

To raise a trouble ticket from an email, select the email or open the email item, and click the 'Raise Ticket in' drop down menu to show all the available administrator specified SharePoint lists. Choose and click the particular SharePoint list under which the ticket item will be generated.



**Screenshot:** To raise a trouble ticket in SharePoint from an email, click a SharePoint list from the 'Raise Ticket in' drop down list.



When you do this, relevant metadata such as caller and problem details, attachments etc. will be extracted from the email to the ticket item. You can add further details to the ticket to be generated such as, the technician that will be responsible for solving the ticket, due-date by which the issue should be resolved, and problem category, type and status and any number of custom metadata.

**Format the problem description, insert images, attachments etc.** to bring out better sense of the problem

**Caller info captured automatically from the Email, or Address Book or SharePoint Contacts List**

**Categorize the issue**

**Assign Technicians who will work and resolve the issue**

**Enforce Service Level, adjust Response and Due date, and update the Status of the issue**

**Deploy any number of Custom Fields of varying data types to collect more specific information from the issue reported by the user**

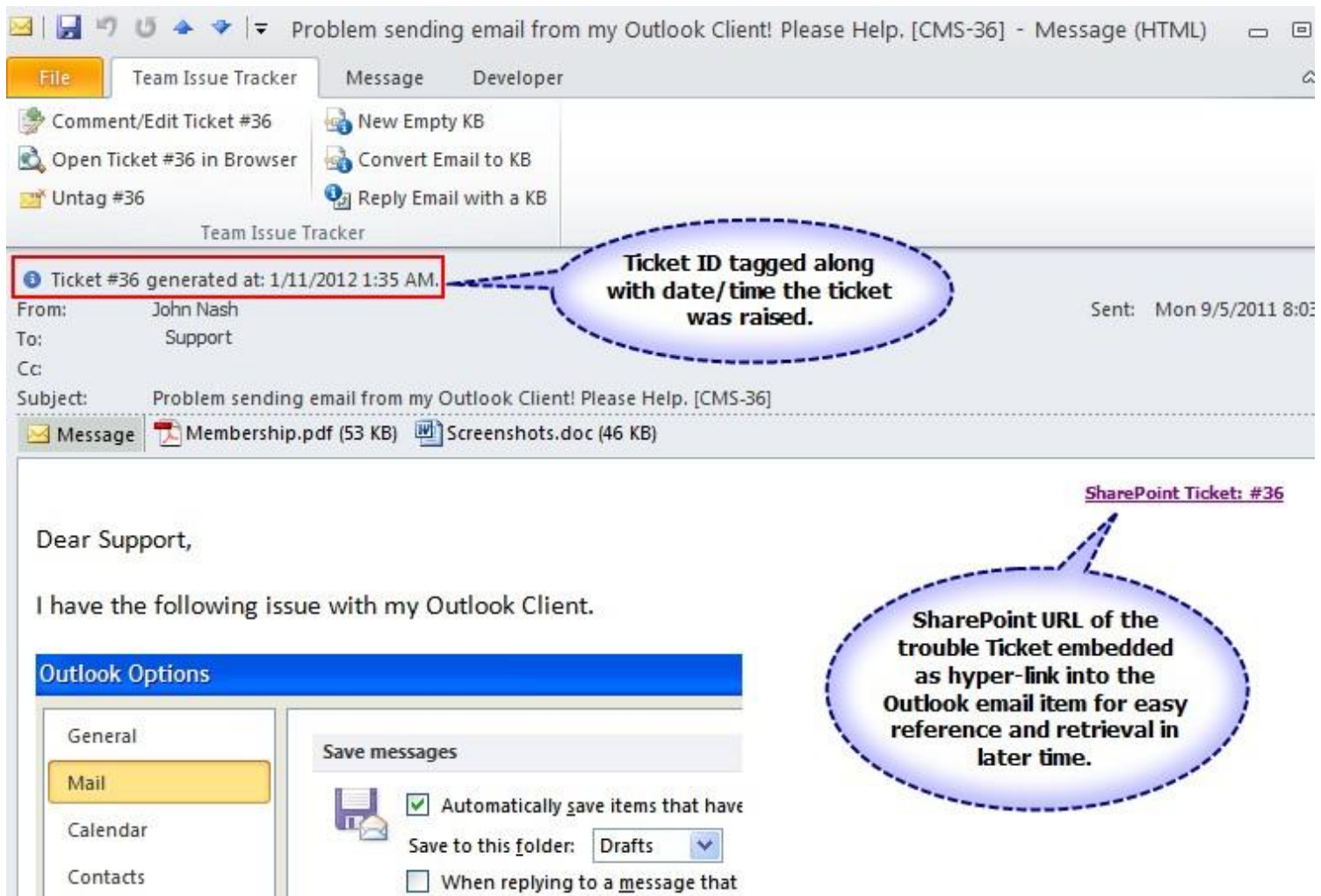
**Ticket form integrated seamlessly in Outlook**  
Enabling you to create or edit ticket stored in SharePoint directly in Outlook

**Screenshot:** Manager can add more information on the problem, caller etc. to the generated ticket

Once a trouble ticket is generated successfully in the chosen SharePoint list, information regarding the ticket, such as the ticket ID, data/time and the URL to the SharePoint ticket are tagged and embedded into the email item in Outlook. This not only provides an easy way to go to the ticket item in the SharePoint site directly, but also prevents other technicians from generating a duplicate ticket, from the same email (a possible scenario on shared mailboxes and mail-enabled public folders).







**Screenshot:** After a ticket is created, the mail item is tagged with information on the trouble ticket such as Ticket ID and URL

In the SharePoint ticket item, most of the fields are populated with the metadata information extracted from the Outlook mail item. For example, the caller contacts detail, the problem description, subject, attachments, formatting and style, inline images and links are retained in the ticket. Also notice that, further information fed by the manager in Outlook, such as the responsible technician, due date, problem category, type and status and other custom fields data are also available in this ticket.



Issue Tracking - Problem sending email from my Outlook Client!...

View

Version History Alert Me

Edit Item Manage Permissions Delete Item

Manage Actions

Title Problem sending email from my Outlook Client! Please Help.

Assigned To bytepad\monica

Description

**9/5/2011 7:31:38 PM - Ticket Assignment Notification Sent to Monica Lewis**

**9/5/2011 7:29:55 PM - Ticket Allotment Notification Sent to John Nash**

**3/17/2011 11:14:06 PM - Problem description received from John Nash**

Dear Support,

I have the following issue with my Outlook Client.

**Outlook Options**

General

Mail

Calendar

Contacts

Tasks

Notes and Journal

Search

Save messages

☒ Automatically save items that have

Save to this folder: Drafts

☐ When replying to a message that

☒ Save forwarded messages

☒ Save copies of messages in the Se

☒ Use Unicode format

Send messages

**"Cannot send message using the server Example SMTP"**

The server 'smtp.example.com' cannot be contacted on p

be delivered."

Any help would be very much appreciated!

Thanks,

John Nash

Comments No existing entries.

Due Date 9/6/2011 9:18 AM

Problem Category Software

Problem Status Processing

Problem Type Office 2008

Resolved No

Resolved Date

Caller Company AMT

Caller Contact Numbe +4488434343

Caller Email JohnNash@AssistMyTeam.local

Caller Name John Nash

Request Received 3/17/2011 11:14 PM

Call Category Level 4 Corporate Executives

Ticket Severity Urgent

Service Level SLA 3

Service Region MA

Attachments

952011 8-03 PM - RE- Problem sending email from my Outlook Client! Please Help. [CMA-4].msg

Screenshots.docx

952011 8-01 PM - RE- Problem sending email from my Outlook Client! Please Help. [CMA-4].msg

image001.png

Membership.pdf

**Automated notification email sent to caller**

**Automated notification email sent to caller**

**HTML formatting and inline images are retained in the SharePoint ticket too!**

**The caller contacts, problem category, type and status are collected from the Outlook email in this SharePoint trouble ticket.**

**Attachments are uploaded automatically to SharePoint, and can be easily accessed from these links.**

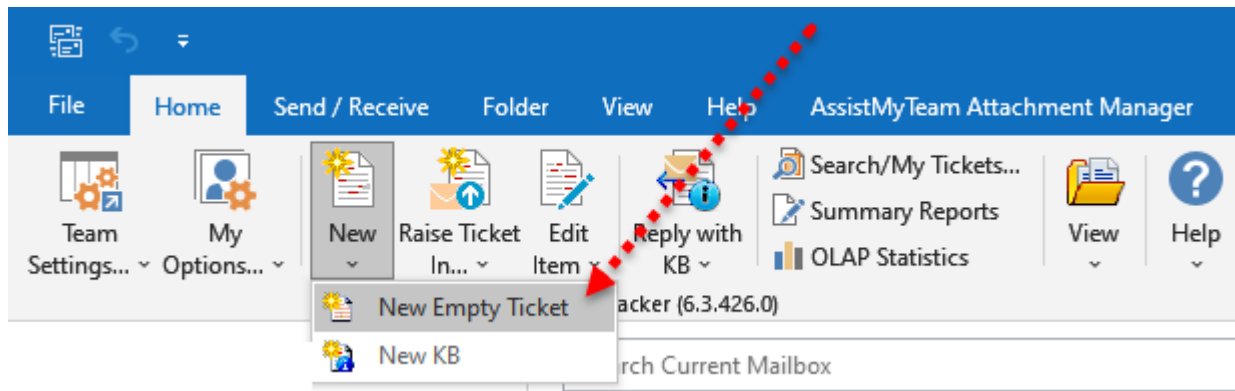
**Screenshot:** This is how the published SharePoint item #158 looks like in your SharePoint site (mapped to the 'Mails' list)



## 5.2 Raise a trouble ticket from an Outlook contact or GAL (address book)

If your helpdesk stores the contact information of your callers/end-users in Outlook contacts or Global Address Lists, you can easily raise a trouble ticket by simply choosing the particular user from the address book.

Click the 'New Empty Ticket' option from the 'New' drop down from the Issue Tracker toolbar.



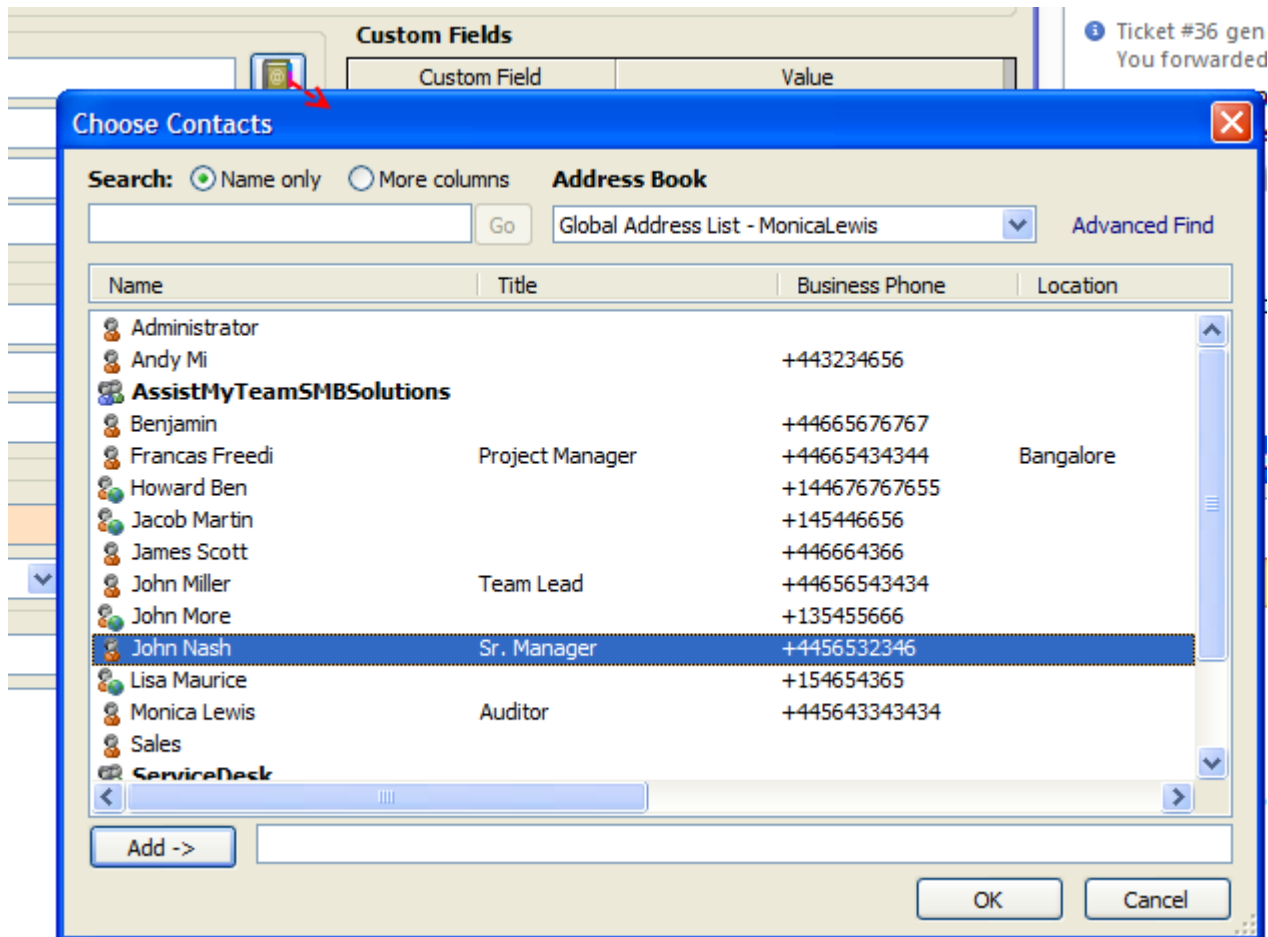
This will display an empty ticket form, similar to the one below.

 A screenshot of the 'Ongoing Issue - New' form. The form has tabs for 'Issue Info', 'Associated Users', 'Related Issues (0)', and 'Related KBs'. The 'Issue Info' tab is active, showing fields for ID, Created, Request Received (26-01-2022 22:03:31), FirstResponse, Modified, Completed On, and Completed By. Below these is the 'Caller' section with fields for Name, Email, and Phone. To the right of the 'Name' field is a button with a contact icon. A callout bubble points to this button with the text 'Choose a contact from your address book or GAL'. On the right side of the form, there is a 'Raise Issue' button and a 'Pick From...' section with buttons for 'Technicians List', 'GAL', 'SharePoint', 'Reply to Caller', and 'Mark Resolved'.

And under Caller Information section, press the button to display the addressbook. You can then get access to all the contact lists, Global Address Lists etc., used by your organization. Choose the particular contact to populate the caller fields in the 'New Ticket' form.



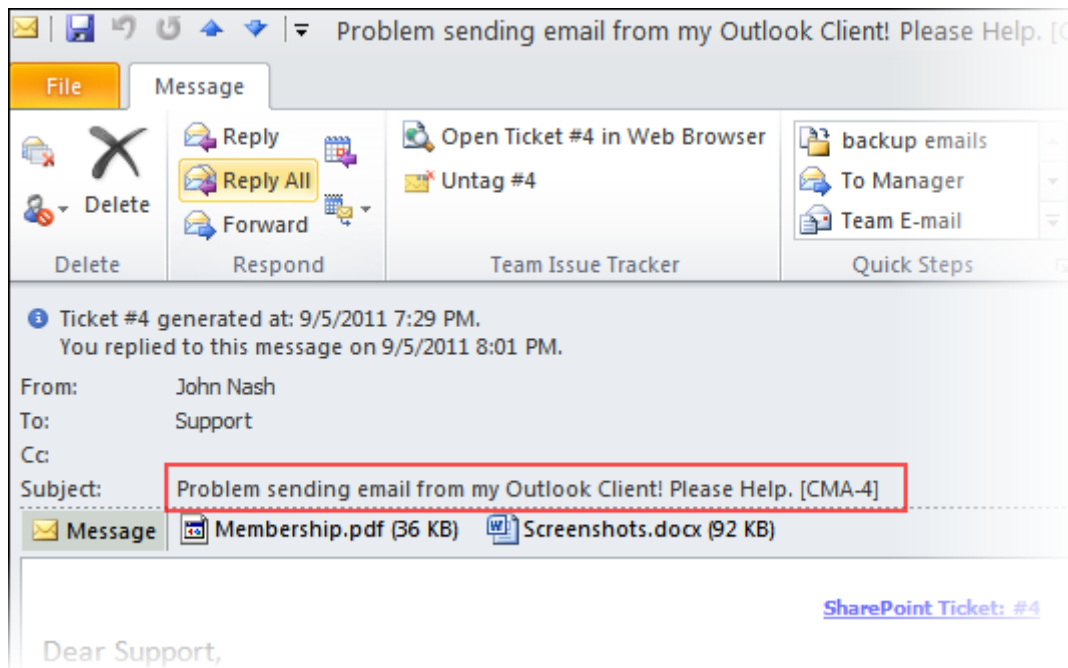




You will see that Issue Tracker automatically extract the information such as the caller's name, email, phone and company from the chosen contact. So, when you have a phone caller from an end-user experiencing some issues and need support from your helpdesk team, you can easily raise a trouble ticket by re-using the information of the caller you already have in your address book, thus saving you time and effort, and increasing efficiency of the ticketing process.

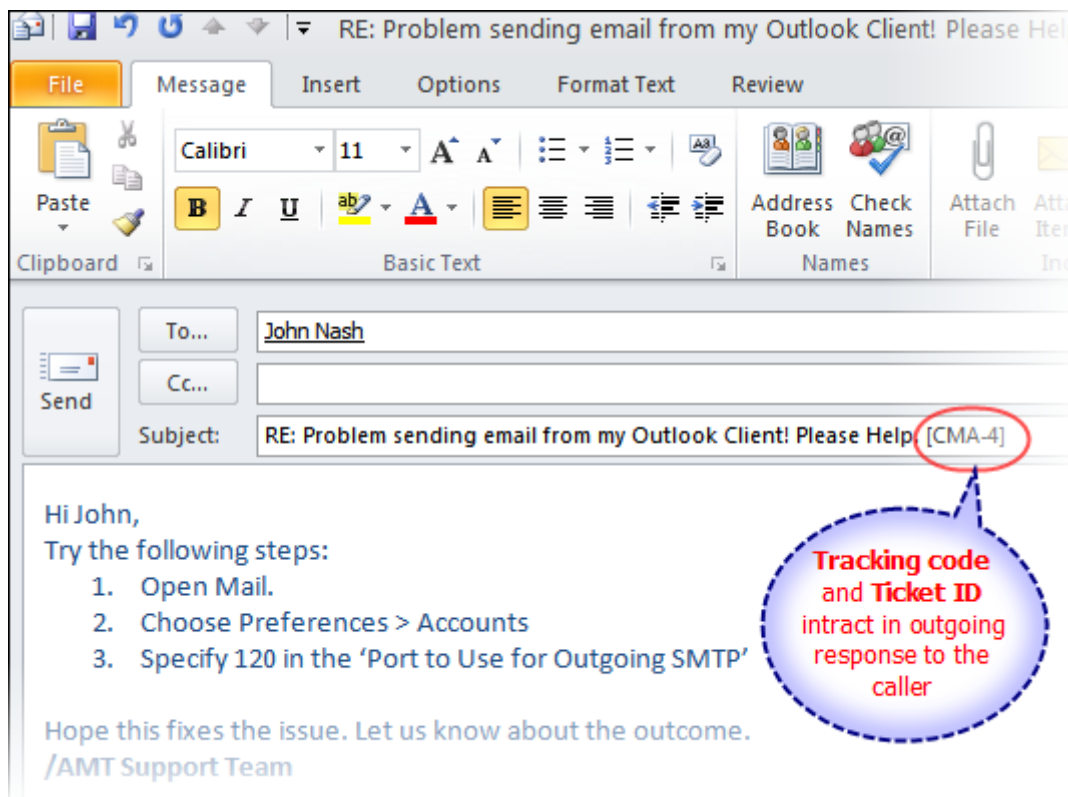
### 5.3. Escalating and updating email conversations to trouble ticket

In the email from which a ticket was raised, you will notice that, in the subject portion, there is an embedded phrase within brackets, enclosing the SharePoint list code and the ticket ID of the raised ticket item. *For example: [CMA-4]*



**Screenshot:** Tracking tag and code are automatically embedded into the original email

This phrase is embedded to the original email for tracking purpose on subsequent email conversations that might happen. As long as this phrase is intact when sending out response to caller, or when caller replies back to the helpdesk, Issue Tracker System will automatically track and associate it with the correct SharePoint list and ticket item.



**Screenshot:** The tracking code remains intact in the subject of the outgoing email, thus allowing for automatic tracking and update of ticket








This means, the ticket item and description field will be updated live automatically, as and when the email is sent out or received. This greatly enhances the productivity of the helpdesk because, no technicians are required anymore to monitor the mailbox for new replies from caller, nor there is need to add and update the new information to the relevant ticket manually. Issue Tracker system automatically does that for you.



**Screenshot:** The SharePoint ticket item is updated when any email response is sent out from the helpdesk, or received to the helpdesk.

Issue Tracking - Problem sending email from my Outlook Client!...

View

 Edit Item
  Version History
  Delete Item
  Alert Me
  Manage Permissions
  Manage
  Actions

Title: Problem sending email from my Outlook Client! Please Help.

Assigned To: bytepad\monica

Description:

**9/5/2011 8:03:02 PM - Reply received from John Nash**

Ah! That fixes my problem. Thank you very much.

Thanks,  
John Nash

**New Attachments:** 952011 8-03 PM - RE- Problem sending email from my Outlook Client! Please Help. [CM]

**9/5/2011 8:01:30 PM - Reply sent to John Nash by 'Monica Lewis'**

Hi John,

Try the following steps:

1. Open Mail.
2. Choose Preferences > Accounts
3. Specify 120 in the 'Port to Use for Outgoing SMTP'

Hope this fixes the issue. Let us know about the outcome.

/AMT Support Team

**New Attachments:** 952011 8-01 PM - RE- Problem sending email from my Outlook Client! Please Help. [CM]

**9/5/2011 7:31:38 PM - Ticket Assignment Notification Sent to Monica Lewis**

**9/5/2011 7:29:55 PM - Ticket Allotment Notification Sent to John Nash**

**3/17/2011 11:14:06 PM - Problem description received from John Nash**

Dear Support,

I have the following issue with my Outlook Client.

**Outlook Options**

General

Mail

Calendar


Contacts

Tasks

Notes and Journal

Search

**Save messages**

 ☒ Automatically save items that have

Save to this folder: Drafts

☐ When replying to a message that

☒ Save forwarded messages

☒ Save copies of messages in the Se

☒ Use Unicode format

**Send messages**

**"Cannot send message using the server Example SMTP"**

The server 'smtp.example.com' cannot be contacted on port 25. Select a different outgoing m...  
be delivered."

Any help would be very much appreciated!

Thanks,

John Nash

**Hierarchically threaded view of all email communications done on the trouble ticket**

**Automated notification email sent to caller**

**Automated notification email sent to caller**



Automated notification emails are sent out to the caller, confirming about the ticket allotment. A snippet entry is available in the description field, that informs helpdesk staffs what the type of notification was sent, when it was sent, and to whom it was sent. Notification about the ticket assignment is also sent out to the responsible staff.

**9/5/2011 7:31:38 PM - Ticket Assignment Notification Sent to Monica Lewis**

**9/5/2011 7:29:55 PM - Ticket Allotment Notification Sent to John Nash**

When further email responses are sent out to the caller from the helpdesk, the description field of the SharePoint ticket is automatically updated, to show the response made to the caller, and by whom.

**9/5/2011 8:01:30 PM - Reply sent to John Nash by Monica Lewis**

Hi John,

Try the following steps:

1. Open Mail.
2. Choose Preferences > Accounts
3. Specify 120 in the 'Port to Use for Outgoing SMTP'

Hope this fixes the issue. Let us know about the outcome.

/AMT Support Team

When the caller replies back to the helpdesk, the ticket information is automatically updated again.

**9/5/2011 8:03:02 PM - Reply received from John Nash**

Ah! That fixes my problem. Thank you very much.

Thanks,

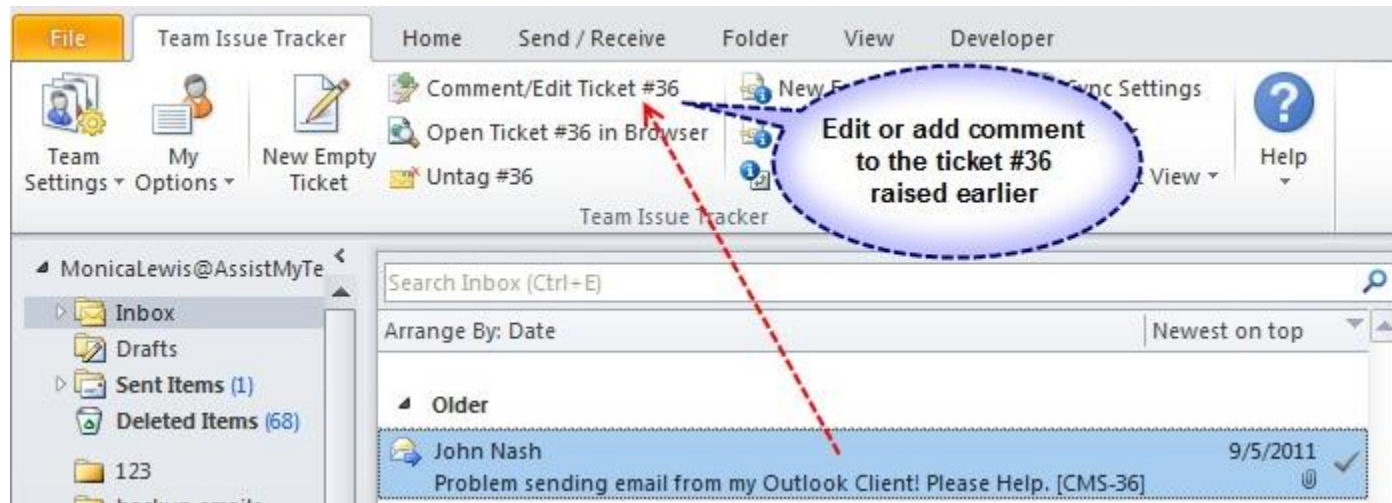
John Nash



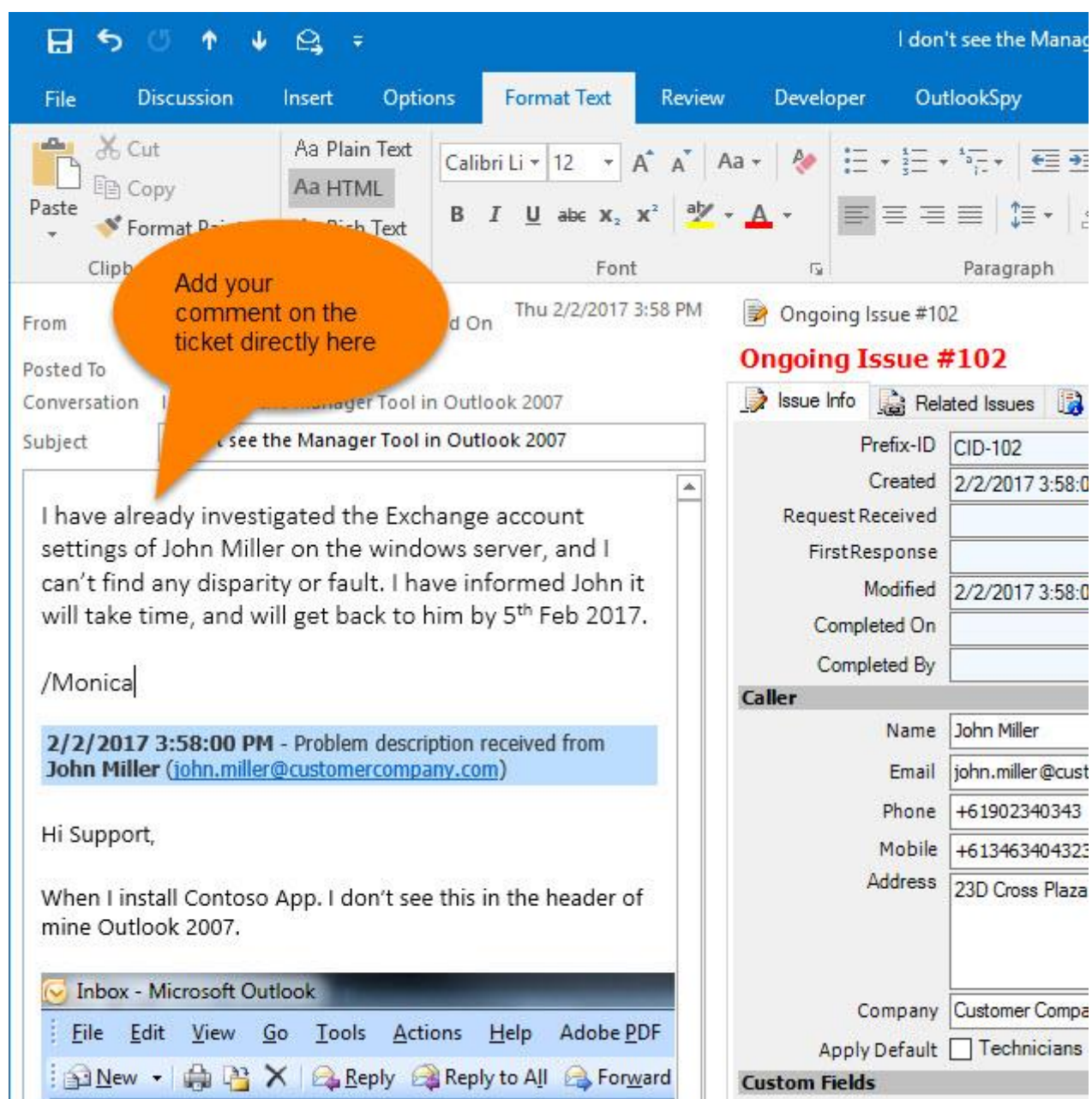


## 5.4 Editing existing ticket and adding new comment directly from Outlook

Now that you have already raised a trouble ticket in a SharePoint list from an email, you or the assigned technician will start working on resolving the ticket. Normally, the technician would directly open the SharePoint site in a web browser and edit the ticket list item directly. Another way of doing this is from the comfort of your Outlook.



If you select the email from which the ticket was raised, or from any email that is associated with that ticket, you will observe that, there is an option '**Comment/Edit Ticket**' under the Issue Tracker toolbar or ribbon. Simply clicking it would load the ticket information in editable form in Outlook. You can then easily edit or update the data into the ticket or add new comment without using your web browser and searching for the particular ticket list item amongst the lot.





## 5.5 Replying to a ticket/email with a KB article

[Refer to section 8.3](#)



## 5.6 Marking a ticket as resolved, or re-opening resolved ticket from Outlook

When you have resolved a trouble ticket, you can mark it complete or closed, such that that particular ticket is no longer monitored and tracked by other technicians/managers, as well as to ensure, that no further automated notifications are sent to the caller (from Issue Tracker add-in). Though you can mark it resolved by opening the particular ticket list item in your web browser, there is another easier way of achieving it from Outlook. What you can do is, select an email that is related to the ticket in Outlook, and click the '**Edit Ticket**' option from the Issue Tracker toolbar or ribbon.

The screenshot shows the Outlook interface with the AssistMyTeam Issue Tracker add-in ribbon. The 'Edit Ticket' button is highlighted with a red box. A blue speech bubble points to the 'Mark Resolved' button in the ticket edit form, with the text 'Click \'Mark Resolved\' to close the ticket'. Another blue speech bubble points to the 'Reply to Caller' button, with the text 'You can also add some comments to go along directly in the conversation and it would updated to the ticket in SharePoint'.

And then from the Ticket edit form, you can check the option '**Mark Resolved**'. You can also enter some comments on the ticket to go along. If your administrator had enabled the '*Send Notification to Caller when ticket is marked resolved*' notification under **Team Settings menu > Advanced Team Options > Notifications**, Issue Tracker will send out the alert to the caller at the same time. This (notification alert) is not available if you use your web browser to mark it as resolved.

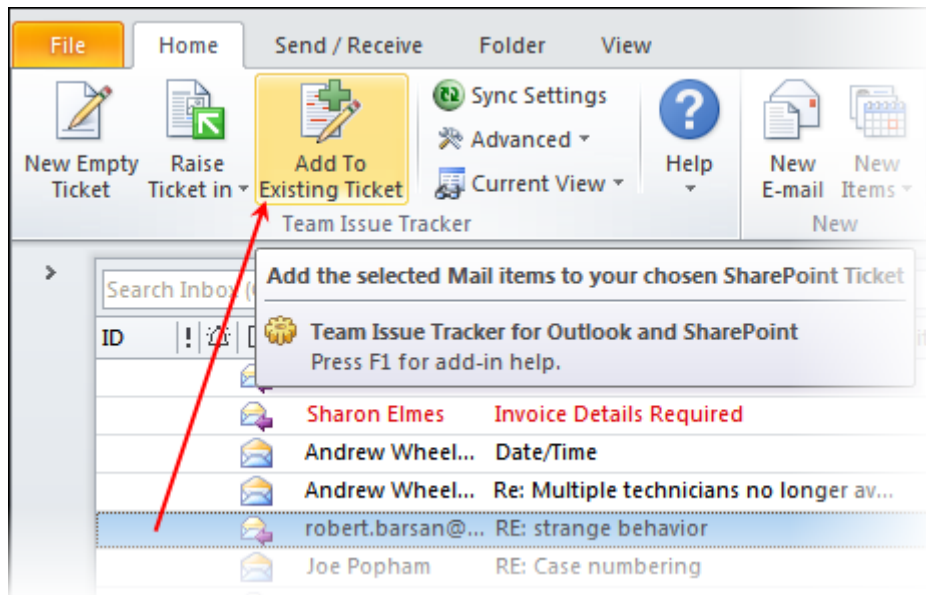
Likewise, if the caller phones the helpdesk to inform about the problem resurfacing again and escalate the resolved ticket, you will have to reopen the ticket. In such a case, you can click the '**Reopen**' option and update the ticket. Doing so, it will trigger a case reopening notification alert, which Issue Tracker will send out to the assigned technician.

However, if the caller replies back to a resolved ticket via email, if the reply contains the ticket code in the subject, most probably Issue Tracker add-in will catch it and automatically updates the ticket with the new information. At the same time, if the ticket is in resolved state, it would be re-open automatically, and notification of reopening ticket will be sent to the assigned technician.



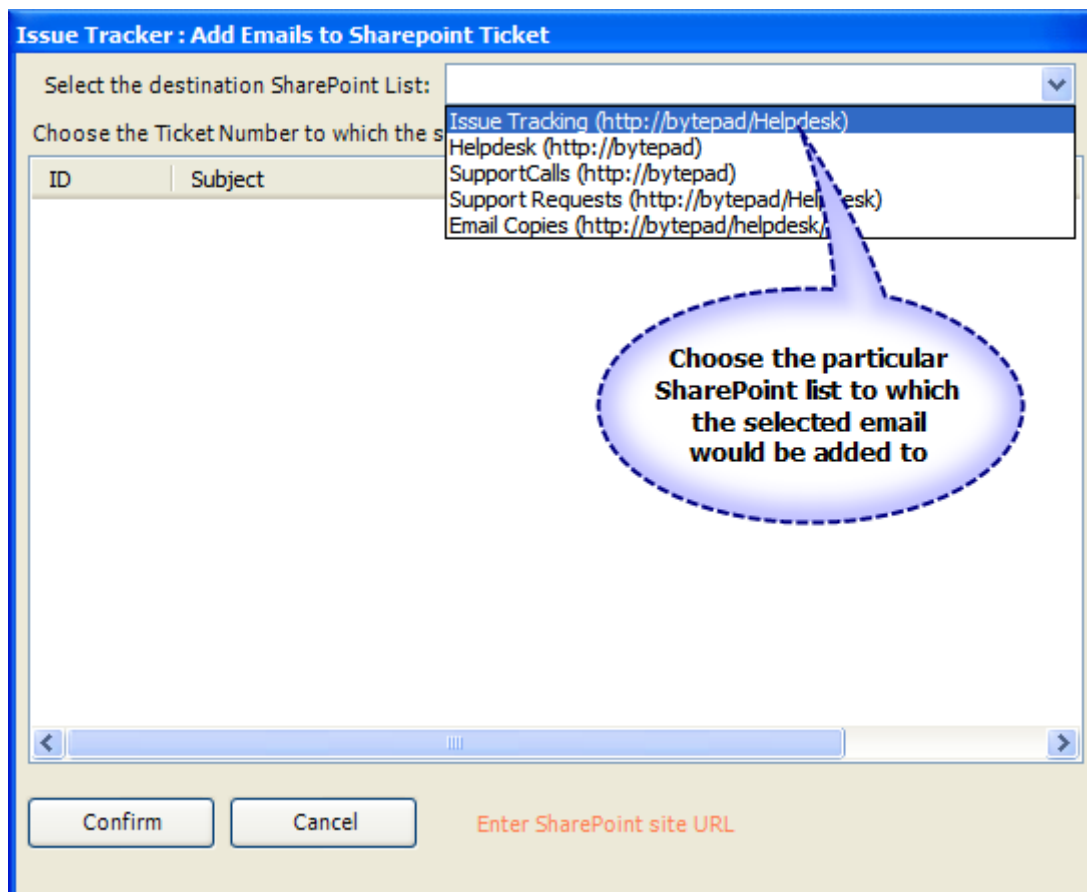
## 5.7. Adding a new email to an existing ticket

Sometimes, you might have emails that are not in continuation to an existing ticket, but are related in one way or other with a ticket. Or let us say, you want it to be related to an existing ticket. As you have learnt earlier, Issue Tracker can automatically process any incoming emails that have the ticket tracking code in the subject. With the tracking code, Issue Tracker will update the ticket item of the particular SharePoint list. However, on emails that don't have this tracking code, what you can do is add the email manually to an existing ticket. You do that from the 'Add to Existing Ticket' button available under the Issue Tracker toolbar or ribbon.



**Screenshot:** Select the email that you want to associate with a ticket, and click the 'Add To Existing Ticket' button

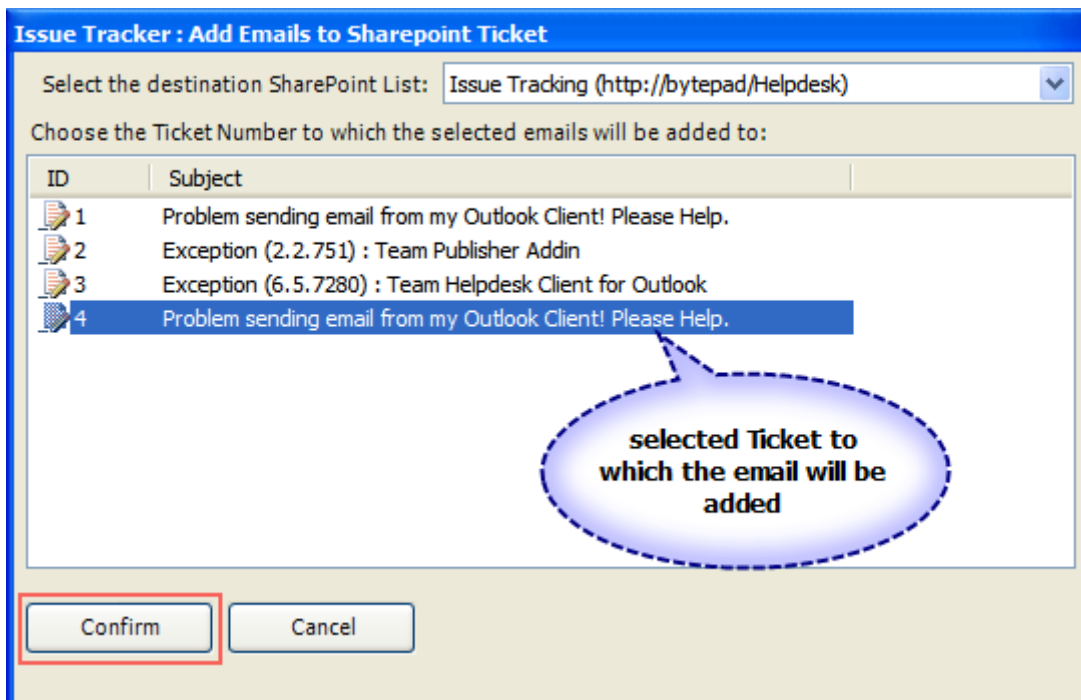
What it does is, to enable you to choose the particular SharePoint list in which the trouble ticket item is located. And then it will let you select the particular ticket ID.



**Screenshot:** Select the particular SharePoint list that contains the Ticket item, to which the selected email would be added to.

All the ticket items available under the selected SharePoint list will be shown in the list view. The first column shows the Ticket ID and the second shows the subject of the ticket. You just need to select the particular ticket ID to which the selected emails from Outlook would be added and associated to the ticket.





**Screenshot:** Select the particular ticket item to which the selected emails in Outlook would be added to, and Click 'Confirm' button.

This is how the chosen ticket item is updated with the contents of the email. Notice that, the actual Outlook email item is also added as an attachment in MSG format. What it means is, other technicians can just click this attachment link to open the particular email in Outlook, in its original state.

|              |  |
|--------------|--|
| Title        | Problem sending email from my Outlook Client! Please Help.   |
| Assigned To  | bytepad\monica   |
| Issue Status |  |
| Priority     | Normal   |
| Description  | <p><b>7/23/2010 11:31:15 AM</b> - Reply received from <b>robert.barsan@orange-ftgroup.com</b></p> <p>Hello!</p> <p>I was not aware this can be done, so, if one of the agents did it might have been by mistake.</p> <p>If such situation happens, can I do something to link back the email in History to its case?</p> <p>Best regards,</p> <p>Robert</p> <p><b>New Attachments:</b> 7232010 11-31 AM - RE- strange behavior.msg</p> |

|             |  |
|-------------|--|
| MyNewList   |  |
| Caller      |  |
| Attachments | <p>952011 8-03 PM - RE- Problem sending email [CMA-4].msg</p> <p>image002.gif</p> <p>Screenshots.docx</p> <p>image003.gif</p> <p><b>7232010 11-31 AM - RE- strange behavior.msg</b></p> <p>image001.jpg</p> <p>952011 8-01 PM - RE- Problem sending email from my Outlook Client! Please Help. [CMA-4].msg</p> <p>image001.png</p> <p>Membership.pdf</p> |

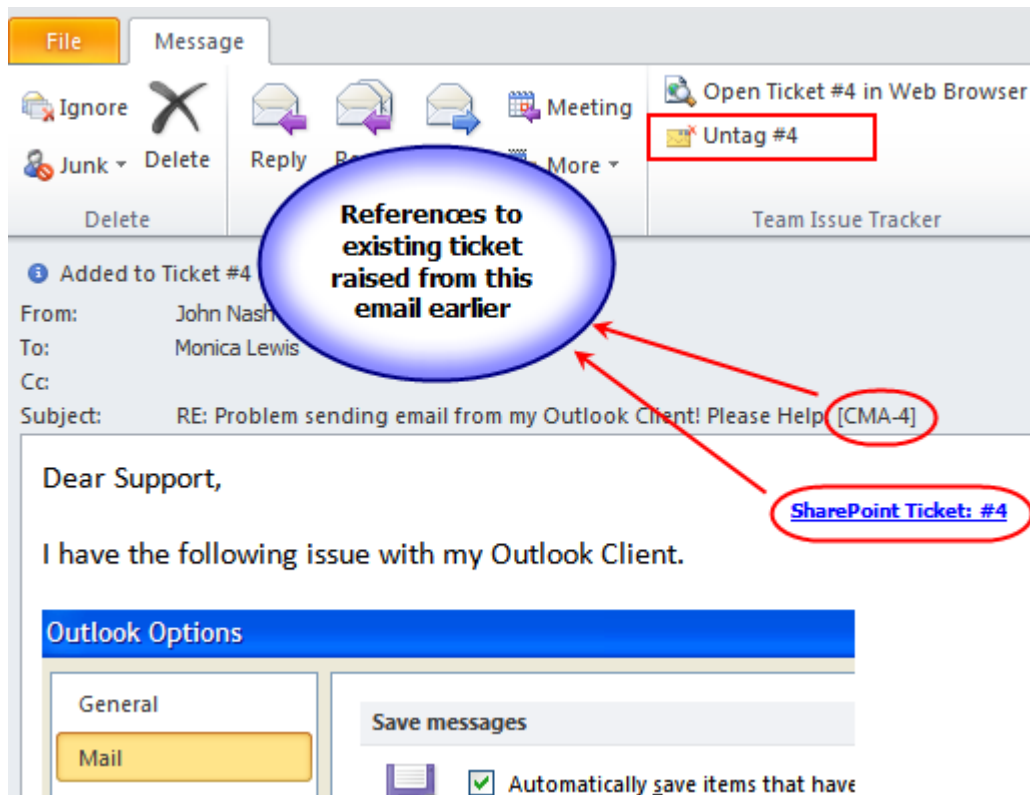
The MSG format of the newly added email available as attachment



## 5.8. Un-tag and reset a processed email item in Outlook

Once you have raised a trouble ticket from an Outlook mail item to a SharePoint list, the ticket ID that was generated in the SharePoint list will be tagged to the particular Outlook mail item for reference. And you will then see the 'Untag' button in the Issue Tracker toolbar or ribbon.

You can use the 'Untag' button to remove all references and links to an existing SharePoint ticket item from the Outlook mail item. This will de-associate the Outlook mail item from the Sharepoint ticket item, and you can then again raise a new trouble ticket to a different SharePoint list.



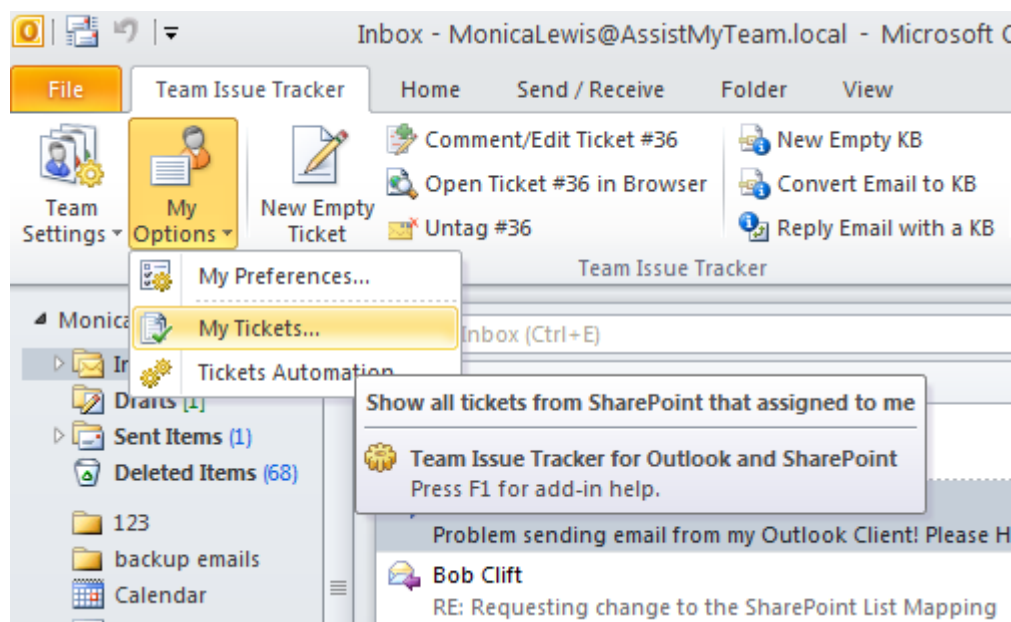
Note that, the functionality to un-tag or reset an email depends on the helpdesk administrative settings. If the administrator had enabled it, individual technician will see this additional un-tag button in their Outlook when an email that was already processed, is selected or opened.





## 5.9 My Tickets – displaying all tickets assigned to you in Outlook

With this 'My Tickets' feature (*Team Issue Tracker > My Options > My Tickets*), you can list and work on the tickets (raised in one or more SharePoint lists) in Outlook that is assigned to you by your manager.



In the 'My Tickets' panel, you can select the particular SharePoint list from which the tickets assigned to you will be shown. You can further filter the tickets to be shown, by the ticket type - ongoing or resolved, or both. And then press 'Show'.

| Subject                          | Ticket ID | Caller                       | Assigned To | Email                        | Resolved | Mobile   | Rejected |
|----------------------------------|-----------|------------------------------|-------------|------------------------------|----------|----------|----------|
| New Download: Issue Tracker...   | ATT-1     | info@assistmyteam.net        |             | info@assistmyteam.net        | True     |          |          |
| New Download: Team TimeSh...     | ATT-2     | info@assistmyteam.net        |             | info@assistmyteam.net        | True     |          | False    |
| New Download: Email to PDF f...  | ATT-3     | info@assistmyteam.net        |             | info@assistmyteam.net        | False    |          | False    |
| test 1st step close              | ATT-4     | support@assistmyteam.com     |             | support@assistmyteam.com     | False    |          |          |
| RE: Outlook Email to PDF, att... | ATT-5     | jari.maatta@luke.fi          |             | jari.maatta@luke.fi          | False    |          |          |
| New Download: Personal Help...   | ATT-6     | info@assistmyteam.net        |             | info@assistmyteam.net        | False    |          |          |
| New Download: Email to PDF f...  | ATT-7     | info@assistmyteam.net        |             | info@assistmyteam.net        | False    |          |          |
| New Download: Team Helpde...     | ATT-8     | info@assistmyteam.net        |             | info@assistmyteam.net        | False    |          |          |
| Problem with my Printer!         | ATT-9     | francas.freedl@assistmyte... |             | francas.freedl@assistmyte... | False    |          |          |
| Printer in Lab 5 not working!    | ATT-11    | John Kinsley                 | bahrur      | john.kinsley@assistmytea...  | True     | +61 4... | False    |
| New Download: Personal Help...   | ATT-10    | info@assistm...              |             | info@assistmyteam.net        | False    |          | False    |

Total: 11 | Ongoing: 8 | Response Time Violation (5) | Due Time Violation (5) | SLA Breach Response Time (5) | SLA Breach Due Time (5)

You will observe that, the tickets are listed in tabular form with detail information on each ticket. You can distinguish between ongoing and resolved tickets by the icon. For example, is for ongoing ticket, whereas, is for resolved ticket.

When you select a ticket from the list, notice that, the buttons on the toolbar becomes active, and based on the state of the ticket (ongoing or resolved), the actions and tasks that can be performed on the ticket are enabled. You can reply to the caller, choose a relevant KB article to embed to the reply, forward to a third person or stakeholder, edit and comment to the ticket, mark as resolved or reopen or delete the ticket and more.

To load a particular ticket to edit/comment, select the ticket item in the list and either double-click it or press the **'Edit Ticket'** button to open the ticket form in Outlook.

**Resolved Issue #11** SharePoint List AX Ticket Tracker (http://bytestation/site1)

**Issue Info** **Associated Users** **Related Issues** **Related KBs**

**ID** ATT-11

**Created** 28/01/2022 22:44:00 (bahrur)

**Request Received** Not Mapped: 'Request Received'

**First Response** Not Mapped: 'First Response Time'

**Modified** 28/01/2022 23:14:00 (bahrur)

**Completed On** 28/01/2022 23:14:00

**Completed By** Not Mapped: 'Completed By'

**Caller**

**Name** John Kinsley

**Email** john.kinsley@assistmyteam.com

**Phone** +61 457434909

**Mobile** +61 457434909

**Address** 245, 24th St. Peter Street, Coogee, NSW 5635

**Company** Angel Heart Hospital

**Apply Default** ☐ Technicians ☐ SLA

**Assignment**

**Category** Hardware

**Type** Keyboard

**Apply Default** ☐ Technicians ☐ SLA

**Self** AssistMyTeam

**Remove**

**Service Level** Urgent

**Response Date** 31/01/2022 11:00:00

**Due Date** 01/02/2022 10:00:00

**Importance** Not Mapped: 'Importance'

**Status** In Progress

**Time Spent**

**Total** 23 (Minutes)

**Add New** (Minutes)

**Specify Ticket Rate**

To enable input of Ticket Rate, map the 'Rate' field to a SharePoint field

**Accepted**

**Completed**

**Update Issue**

**Pick From...**

**Technicians List**

**GAL**

**SharePoint**

**Reply to Caller**

**Reopen**

**Reject**

**Generate KB**

**Delete**

**Save As Draft**

**Exit**

**From** Issue Tracker Tickets

**Posted On**

**Conversation**

**Subject** Printer in Lab 5 not working!

Hi John Kinsley,

Our IT dept. has been notified. Will update on it is fixed.

Support XYZ

**29/03/2017 18:04:15 - Problem description received from info@assistmyteam.net**

I am unable to use the printer on Lab 5 since last Tuesday. Please fix it soon.

John Kinsley

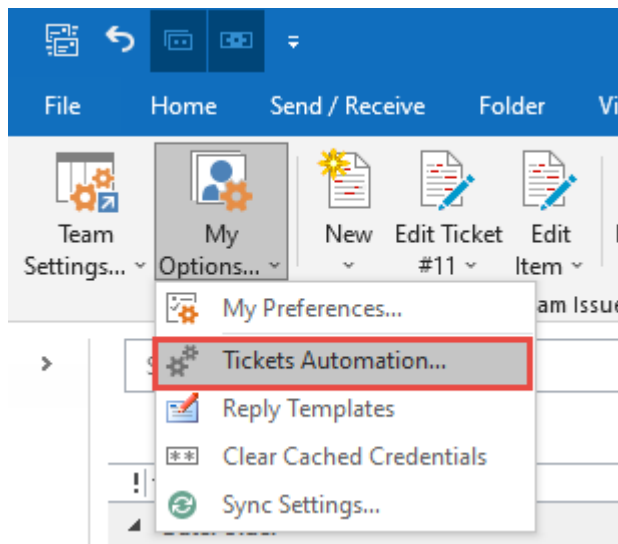
You can now feed information and comment to the ticket and update, from the comfort of your Outlook. If you are the manager, and are assigning the ticket to a technician, Issue Tracker will automatically send out notification alert on the ticket assignment to the technician, as well as, insert due date appointment to the technician's default calendar. Optionally, Issue Tracker will also add or update the due date information of the ticket into an administrator specified dedicated SharePoint calendar.



## 5.10. Automatic trouble tickets

Issue Tracker technician add-in provides a way for automatic raising of trouble tickets on a particular SharePoint list from new incoming emails, without requiring your intervention. This is achieved by real-time monitoring of user chosen Outlook mail folders or mailboxes. Such automation comes very handy and productive, if you have dedicated mail folders or mailboxes that are solely for support purposes. This spares you from having to do that laborious work of selecting emails and clicking a SharePoint list from the drop down to raise tickets.

To configure the Automatic Publishing feature, go to **'My Options'** menu, and click **'Ticket Automation'** option.



This Configuration Panel shows all the monitored Outlook folders. You can monitor any number of Outlook folders, either public folders or shared mailbox folders.

**Tickets Automation...**

Select an Option

☐ Exchange Mailbox - Add a shared exchange user's mailbox

☒ Exchange Folder - Add an exchange public folder or a shared folder

New Selected mailbox/folder

Monitored Folders list

| Folder/Mailbox                | Category | Type     | Status      | Service Level | Technicians  | SharePoint List        | Active                              | Ticket Mode |
|-------------------------------|----------|----------|-------------|---------------|--------------|------------------------|-------------------------------------|-------------|
| \\Public Folders\TIT\AUto     | Hardware | Keyboard | Awaiting    | Urgent        | AssistMyTeam | AX Ticket Tracker (h   | <input checked="" type="checkbox"/> | Both        |
| \\support@assistmyteam.net\In | Software | Outlook  | In Progress | Immediate Re  | AssistMyTeam | Trouble Tickets (http  | <input checked="" type="checkbox"/> | Both        |
| \\sales@assistmyteam.com\Int  | Hardware | PC       | Escalated   | Very Low      | AssistMyTeam | TroubleTicket (http:// | <input checked="" type="checkbox"/> | Both        |

☐ Publish un-processed emails to tickets (if any) in these monitored folders during Outlook Startup

To monitor a new Outlook folder, press the *'Select Folder...'* button and choose the desired Outlook folder from the prompt dialog. And then click the button *'Confirm & Add'* to add in the monitored lists grid. You can then select to which SharePoint list you like the Outlook items of this folder to publish automatically.

You can also associate a default value for fields such as *Problem Category*, *Problem Type*, *Status* and *Technician* to a

monitored folder or mailbox, such that trouble tickets generated from the particular mailbox or folder, will have those associated values, automatically assigned. As a consequence of this dynamic assignment, Issue Tracker will send out notification emails, to the assigned technician automatically.

This automation allows helpdesk managers to get rid of manual assignment, and helps to improve the efficiency, and response time of your helpdesk team.

You can also deactivate the automatic processing of a particular folder or mailbox, without needing to remove it from the list. This may prove useful in circumstances where you want to temporary cease the automatic processing of incoming emails into the mailbox or the folder.



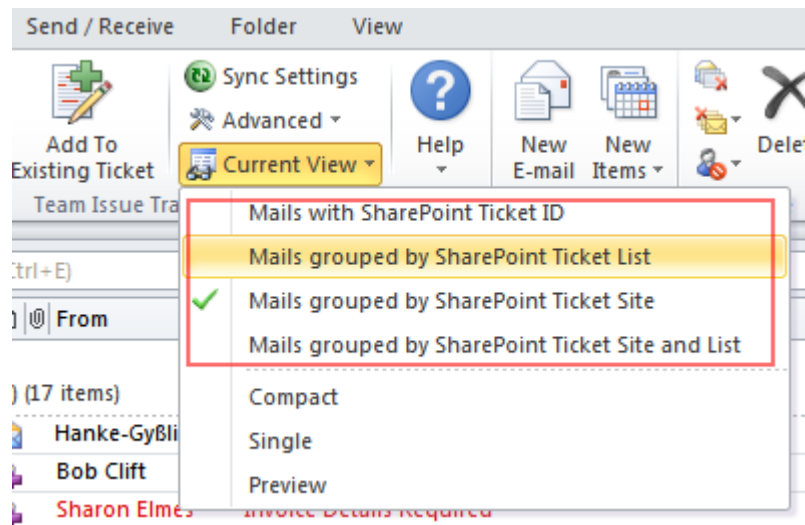


## 5.11. Work with Outlook Views

Outlook views are a wonderful tool to automatically sort, quickly find information and rapidly re-arrange Outlook items in any folder.

Views can also be organized to group and filter items to make a particular feature of your information obvious at first glance.

In every Outlook folder or calendar or contact, Issue Tracker automatically adds four (4) special Outlook views to help organize, sort and track Outlook items in a simpler and sensible way. These views can be accessed through the 'Current Views' drop-down menu, available in the Issue Tracker toolbar or ribbon.



### View 1 – Mails with SharePoint Ticket ID

This is a table view, where the Outlook mail items are arranged by the unique ticket item 'ID' of the SharePoint Ticket item in descending order. The SharePoint List Name and Site Name are also available in the view.

| ID          | From            | Subject                       | List Name      | Site                    | Received          |
|-------------|-----------------|-------------------------------|----------------|-------------------------|-------------------|
| Date: Older |                 |                               |                |                         |                   |
| 60          | Lisa Bub        | Submit Button & TWA Issues    | Mails          | http://bytepad/Helpdesk | Sat 2/12/2011 6:  |
| 55          | Becca           | I broke it.                   | Issue Tracking | http://bytepad/Helpdesk | Sat 2/12/2011 3:  |
| 54          | Hanke-GyBlin... | AW: Question Team Helpdes...  | Issue Tracking | http://bytepad/Helpdesk | Fri 2/11/2011 8:0 |
| 53          | Bob Cliff       | Attachment Manager            | Issue Tracking | http://bytepad/Helpdesk | Wed 7/28/2010 8   |
| 5           | Sharon Elmes    | Invoice Details Required      | Sales 2011     | http://bytepad/Sales    | Tue 7/27/2010 2:  |
| 4           | Ben Nel         | RE: Outlook database exporter | Sales 2011     | http://bytepad/Sales    | Mon 7/26/2010 4   |
| 3           | Andrew Whee...  | Screen shot                   | Sales 2011     | http://bytepad/Sales    | Tue 7/6/2010 11:  |
| 2           | info@assistm... | New Enquiry Submitted from... | Sales 2011     | http://bytepad/Sales    | Tue 6/29/2010 10  |
| 3           | Lynn Nuckols    | Document Exporter             | Tasks          | http://bytepad/Sales    | Fri 6/25/2010 1:  |
| 2           | Dan Tang        | Fw: New Support Request: S... | Tasks          | http://bytepad/Sales    | Wed 6/23/2010 :   |
| 1           | Upload.com      | How will you get ahead?       | Tasks          | http://bytepad/Sales    | Wed 6/23/2010 :   |

### View 2 – Mails grouped by SharePoint Ticket list

This is a table view, where all the Outlook mail items are grouped by the SharePoint Ticket List name. Along with the list name, you will see the sub total number of items in that group under the bracket.

| ID                                  | From                | Subject                             | Site                | Received              |
|-------------------------------------|---------------------|-------------------------------------|---------------------|-----------------------|
| List Name: Issue Tracking (3 items) |                     |                                     |                     |                       |
| 55                                  | Becca               | I broke it.                         | http://bytepad/H... | Sat 2/12/2011 3:56 AM |
| 54                                  | Hanke-GyBling, T... | AW: Question Team Helpdesk for O... | http://bytepad/H... | Fri 2/11/2011 8:02 PM |
| 53                                  | Bob Cliff           | Attachment Manager                  | http://bytepad/H... | Wed 7/28/2010 8:16 PM |
| List Name: Mails (1 item)           |                     |                                     |                     |                       |
| 60                                  | Lisa Bub            | Submit Button & TWA Issues          | http://bytepad/H... | Sat 2/12/2011 6:28 AM |
| List Name: Sales 2011 (4 items)     |                     |                                     |                     |                       |
| 5                                   | Sharon Elmes        | Invoice Details Required            | http://bytepad/S... | Tue 7/27/2010 2:07 PM |
| 4                                   | Ben Nel             | RE: Outlook database exporter       | http://bytepad/S... | Mon 7/26/2010 4:37 PM |
| 3                                   | Andrew Wheelho...   | Screen shot                         | http://bytepad/S... | Tue 7/6/2010 11:55 PM |



### View 3 – Mails grouped by SharePoint Ticket Site

This is a table view where the Outlook items are grouped by the SharePoint Ticket site URL.

| ID                                      | From                | Subject                                   | List Name      | Received               |
|---|---------------------|---|----------------|------------------------|
| Site: http://bytepad/Helpdesk (4 items) |                     |   |                |                        |
| 60                                      | Lisa Bub            | Submit Button & TWA Issues                | Mails          | Sat 2/12/2011 6:28 AM  |
| 55                                      | Becca               | I broke it.                               | Issue Tracking | Sat 2/12/2011 3:56 AM  |
| 54                                      | Hanke-GyBling, T... | AW: Question Team Helpdesk for Outlook    | Issue Tracking | Fri 2/11/2011 8:02 PM  |
| 53                                      | Bob Clift           | Attachment Manager                        | Issue Tracking | Wed 7/28/2010 8:16 PM  |
| Site: http://bytepad/Sales (7 items)    |                     |   |                |                        |
| 5                                       | Sharon Elmes        | Invoice Details Required                  | Sales 2011     | Tue 7/27/2010 2:07 PM  |
| 4                                       | Ben Nel             | RE: Outlook database exporter             | Sales 2011     | Mon 7/26/2010 4:37 PM  |
| 3                                       | Andrew Wheelho...   | Screen shot                               | Sales 2011     | Tue 7/6/2010 11:55 PM  |
| 2                                       | info@assistmytea... | New Enquiry Submitted from Contact Page   | Sales 2011     | Tue 6/29/2010 10:18 PM |
| 3                                       | Lynn Nuckols        | Document Exporter                         | Tasks          | Fri 6/25/2010 1:58 AM  |
| 2                                       | Dan Tang            | Fw: New Support Request: SupportCalls ... | Tasks          | Wed 6/23/2010 11:54 PM |
| 1                                       | Upload.com          | How will you get ahead?                   | Tasks          | Wed 6/23/2010 5:00 AM  |

### View 4 – Mails grouped by SharePoint Ticket Site and List

This is a table view, where all the Outlook items are first grouped by the SharePoint Ticket Site URL, and then further sub-grouped by the SharePoint Ticket List name. This gives you a hierarchy tree representation of all Outlook organized and summarized in a better way.

| ID                                      | From                   | Subject  | Received               |
|---|------------------------|--|------------------------|
| Site: http://bytepad/Helpdesk (4 items) |                        |  |                        |
| List Name: Issue Tracking (3 items)     |                        |  |                        |
| List Name: Mails (1 item)               |                        |  |                        |
| Site: http://bytepad/Sales (7 items)    |                        |  |                        |
| List Name: Sales 2011 (4 items)         |                        |  |                        |
| 5                                       | Sharon Elmes           | Invoice Details Required                         | Tue 7/27/2010 2:07 PM  |
| 4                                       | Ben Nel                | RE: Outlook database exporter                    | Mon 7/26/2010 4:37 PM  |
| 3                                       | Andrew Wheelhouse      | Screen shot                                      | Tue 7/6/2010 11:55 PM  |
| 2                                       | info@assistmyteam.n... | New Enquiry Submitted from Contact Page          | Tue 6/29/2010 10:18 PM |
| List Name: Tasks (3 items)              |                        |  |                        |
| 3                                       | Lynn Nuckols           | Document Exporter                                | Fri 6/25/2010 1:58 AM  |
| 2                                       | Dan Tang               | Fw: New Support Request: SupportCalls with Ou... | Wed 6/23/2010 11:54 PM |
| 1                                       | Upload.com             | How will you get ahead?                          | Wed 6/23/2010 5:00 AM  |



## 5.12. Personal Preferences

Individual Technician can use the preference settings to customize and control some aspect of the ticket generation from their Outlook.

You can invoke the Personal Preferences panel from **Advanced menu > My Preferences**.

My Preferences...

General | Default Values | User Interface | Auto Email Tracking | Others

☐ Hide progress dialog shown in SharePoint Upload

☐ Hide pop-up confirmation message

☐ Open the newly published SharePoint item in a web browser

☒ Assign 'Self' as the Technician for newly generated Tickets

☒ Use Reply Template when using KB to reply to an email

Show Duration in Report as

☒ Days ☐ Hours ☐ Minutes

**What do you want to do with the processed mail item?**

☒ Nothing (leave it intact in its original location)

☐ Move to 'Tickets' subfolder within the parent folder

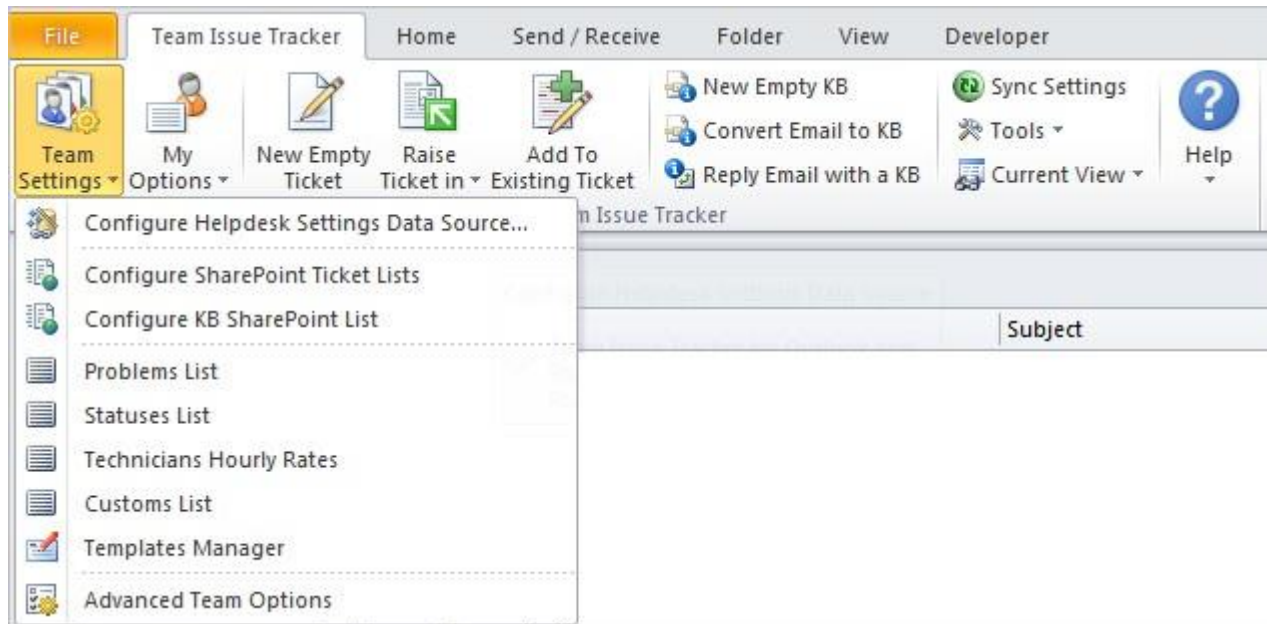
☐ Move to the following Outlook folder



## 6. Team Settings for Administrator

AssistMyTeam Issue Tracker is designed as a groupware solution, where multiple technicians will install and use Issue Tracker on the same set of helpdesk settings, logic and data structure. The settings and configurations of the entire helpdesk are stored on a central SharePoint repository, accessible to all staffs of the helpdesk. With the help of the Admin install of Issue Tracker add-in, managers can define drop down lists for categories, statuses and other custom lists, configure the ticketing workflow from Outlook to SharePoint, control how individual technician raise tickets and work on emails in Outlook etc.

If you have installed the admin version of Issue Tracker add-in, you will see an additional menu 'Team Settings' under the Issue Tracker toolbar or ribbon.



### Learn more...

- 6.1 [Configure SharePoint Ticket Lists](#)
  - 6.1.1 [The Fields Mapping Tool](#)
  - 6.1.2 [Unique Tracking Code Prefix for each SharePoint List](#)
- 6.2 [Configure KB SharePoint List](#)
- 6.3 [Define drop down lists](#)
  - 6.3.1 [Problems List](#)
  - 6.3.2 [Statuses List](#)
  - 6.3.3 [Technicians Rates](#)
  - 6.3.4 [Custom Fields List](#)
- 6.4 [Notification Templates Manager](#)
- 6.5 [Advanced Team Options](#)

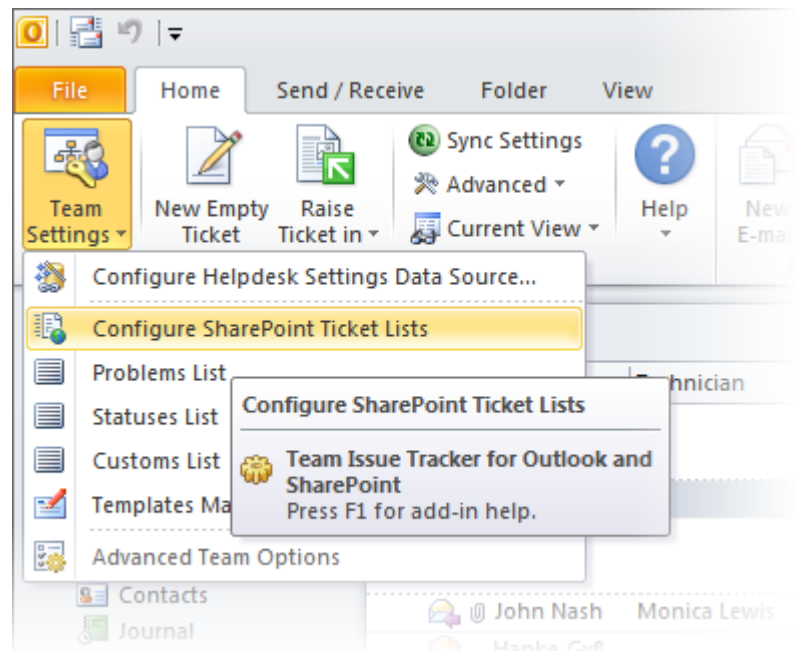




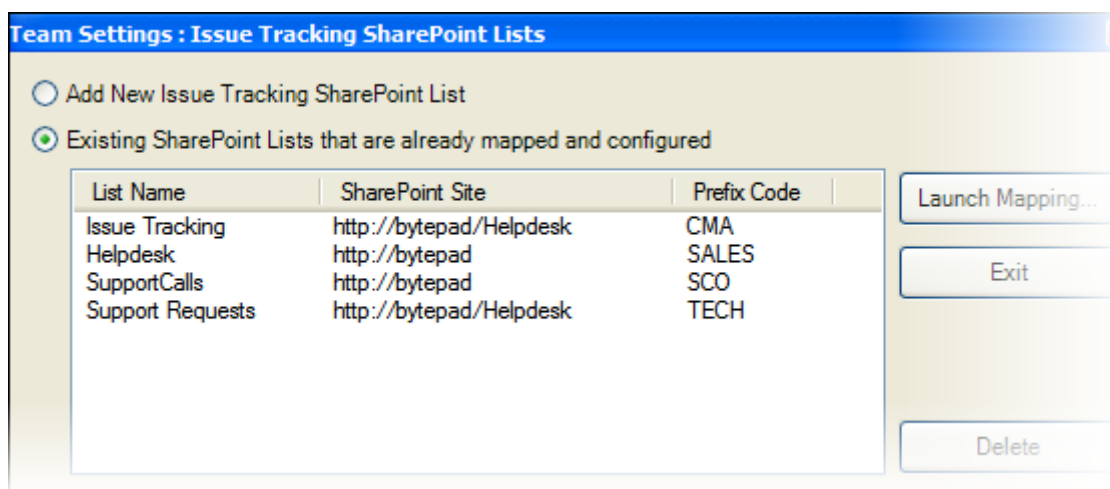
## 6.1. Administration: Configure SharePoint Ticket Lists

Before you and other technicians can start raising trouble tickets from Outlook emails to SharePoint, the helpdesk manager needs 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 **Team Settings menu > 'Configure SharePoint Ticket Lists'**.

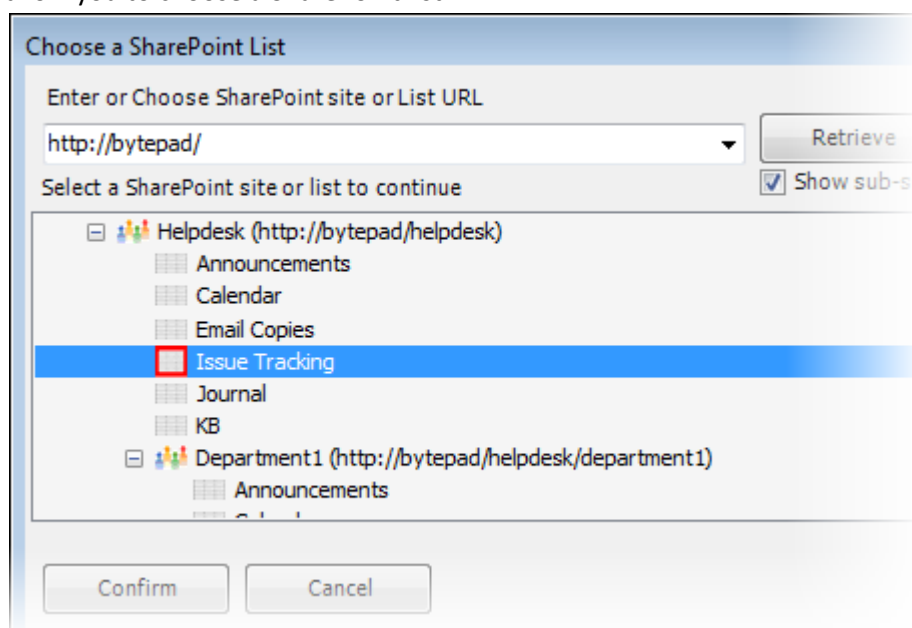


Here is a listing of all SharePoint lists that are configured for storing trouble tickets. These chosen SharePoint lists would be deployed to all technicians in their Outlook (i.e., individual technician would be able to raise a ticket from an email to one of these SharePoint list).



**Screenshot:** Administrator chosen SharePoint lists for collecting trouble tickets raised by helpdesk staffs from their emails in Outlook.

- To configure a new SharePoint ticket list and perform fields mapping, select 'Add New Issue Tracking SharePoint List' option and click 'Launch Mapping...' button. You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list.



- To re-configure an existing fields mapping, simply select the particular SharePoint list item, and click 'Launch Mapping...' button. You can also double-click the SharePoint list to launch the mapping tool.
- To remove an existing fields mapping, select the particular list item and click 'Delete' button. This will permanently remove the selected mapping settings. NOTE: The SharePoint list associated with this mapping is not deleted; just the reference is removed from the Helpdesk Settings Data Source.

### 6.1.1 The mapping tools

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. 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.

This mapping feature also allows you to dynamically create new field of the relevant data type in the SharePoint list, so that you can associate it with an Outlook field.

**Screenshot:** Fields mapping tool where the mail fields are mapped to SharePoint List Fields

**Team Settings : Fields Mapping**

SharePoint list to which mails would be published to:

Unique Tracking Prefix Code:  Please provide a unique code of 5 or less characters

Map fields between Outlook mail to SharePoint list

|    | Outlook Field       | Data Type                         | SharePoint Field      |
|----|---------------------|-----------------------------------|-----------------------|
| 1  | AssignTo            | User                              | Assigned To           |
| 2  | CL_Caller Category  | Choice                            | Call Category         |
| 3  | SenderCompanyName   | Text                              | Caller Company        |
| 4  | SenderContactNumber | Text                              | Caller Contact Number |
| 5  | SenderEmailAddress  | Text                              | Caller Email          |
| 6  | SenderName          | Text                              | Caller Name           |
| 7  | HTMLBody            | Note                              | Description           |
| 8  | DueDate             | Date/Time                         | Due Date              |
| 9  | Importance          | Choice                            | Priority              |
| 10 | ProblemCategory     | Choice                            | Problem Category      |
| 11 | ProblemStatus       | Choice                            | Problem Status        |
| 12 | ProblemType         | Choice                            | Problem Type          |
| 13 | ReceivedTime        | Date/Time                         | Request Received      |
| 14 | Resolved            | Yes/No                            | Resolved              |
| 15 | ResolvedDate        | Date/Time                         | Resolved Date         |
| 16 | CL_Service Level    | Choice                            | Service Level         |
| 17 | CL_States           | Choice                            | Service Region        |
| 18 | CL_Problem Severity | Choice                            | Ticket Severity       |
| 19 | Subject             | Text                              | Title                 |
| 20 | EntryID             | <input type="text" value="Text"/> |                       |
| 21 | ExpiryTime          | Date/Time                         |                       |

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 'SenderName' is mapped to SharePoint field 'Caller Name', and Outlook field 'HTML Body' to SharePoint field 'Description' etc.

There are 3 kinds of fields listed above in the grid:

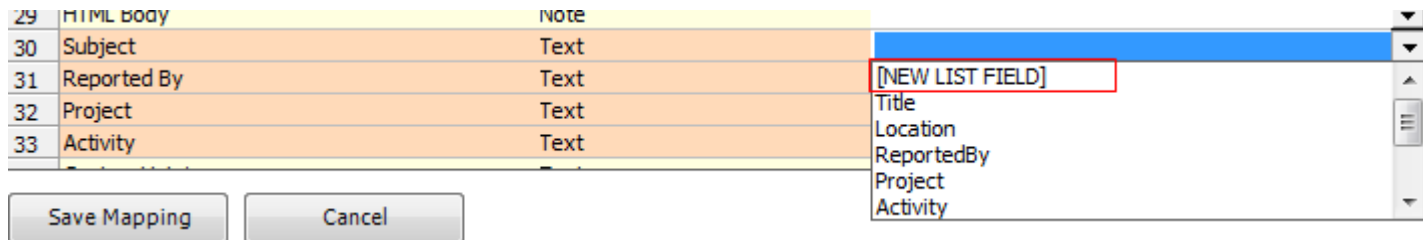
- **Required fields** – these are the fields that are mandatory for mapping to a SharePoint list. These fields are shown in light-reddish background.
- **Optional fields** – these are the fields that you can opt to include in the mapping so that the corresponding values from the mail item are also available in the ticket item. These fields are usually the inbuilt fields of the Outlook mail item. These are shown in light-yellow background.



- **Custom list fields** – these are the fields that you or the helpdesk administrator had defined, to add any further information on the problem, case or the caller to a trouble ticket. These appear in green background, and the title always starts with 'CL\_'. Example 'CL\_Service Level'

### 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.



**Field Name**

Specify a unique name for the new field!

OK

Cancel

TimeSheet Subject

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.

|    |             |      |                   |
|----|-------------|------|-------------------|
| 29 | HTML Body   | Note |                   |
| 30 | Subject     | Text | TimeSheet Subject |
| 31 | Reported By | Text | ReportedBy        |
| 32 | Project     | Text | Project           |
| 33 | Activity    | Text | Activity          |

### Fields available for mapping to SharePoint list

AlternateRecipientAllowed, AssignTo, AutoForwarded, BCC, BillingInformation, Body, Categories, CC, Companies, ConversationIndex, ConversationTopic, CreationTime, DeferredDeliveryTime, DeleteAfterSubmit, DueDate, EntryID, ExpiryTime, FlagRequest, HTMLBody, Importance, LastModificationTime, MessageClass, Mileage, NoAging, OriginatorDeliveryReportRequested, ProblemCategory, ProblemStatus, ProblemType, ReadReceiptRequested, ReceivedByName, ReceivedOnBehalfOfName, ReceivedTime, RecipientReassignmentProhibited, ReminderOverrideDefault, ReminderPlaySound, ReminderSet, ReminderSoundFile, ReminderTime, ReplyRecipientNames, Resolved, ResolvedDate, SenderCompanyName, SenderContactNumber, SenderEmailAddress, SenderName, Sensitivity, Sent, SentOn, SentOnBehalfOfName, Size, Subject, Submitted, To, UnRead, VotingResponse

### Mandatory Fields for Mapping

Note that the following fields are mandatory when you perform mapping to any SharePoint list:

**AssignTo, DueDate, HTMLBody, ProblemCategory, ProblemType, ProblemStatus, Resolved, ResolvedDate, SenderCompanyName, SenderContactNumber, SenderEmailAddress, SenderName, Subject**

If any of these mandatory field(s) are not mapped, you will get a 'mandatory fields not mapped' warning message and the settings won't be saved.



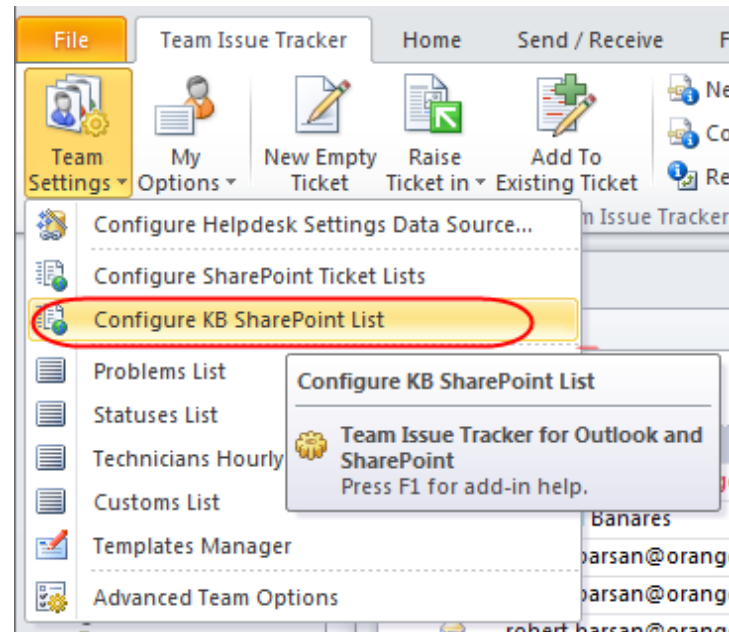




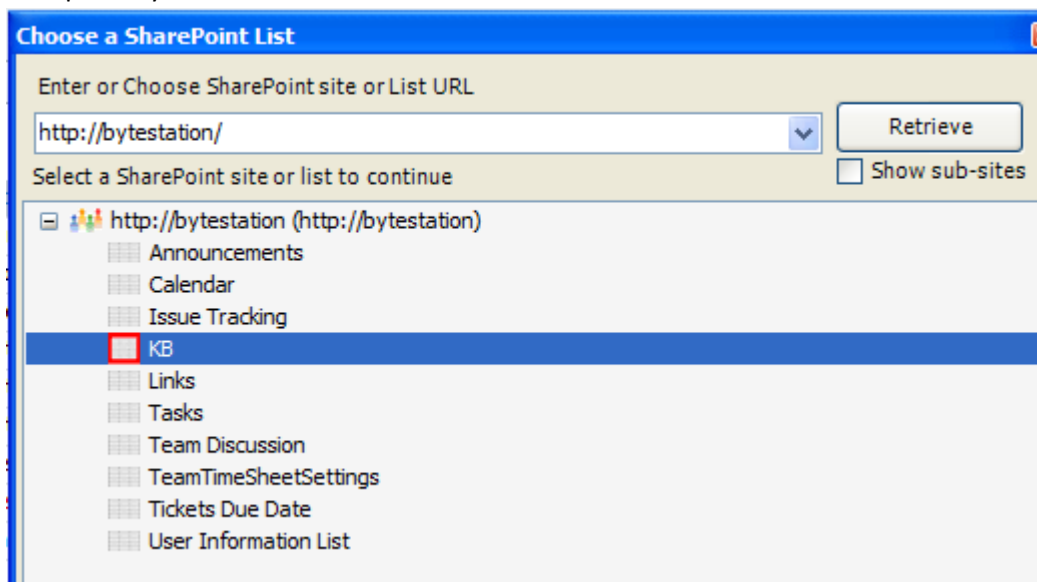
## 6.2 Configure KB SharePoint List

Before you and other technicians can start creating and using KB articles, the knowledge base module needs to be first configured and mapped with a SharePoint list.

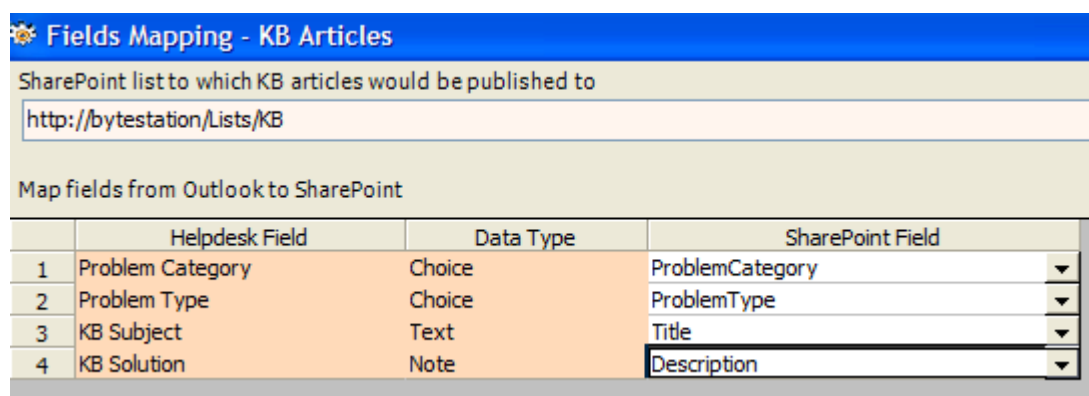
To configure a new SharePoint list for use for storing KB articles, go to **Team Settings** menu > '**Configure KB SharePoint List**'.



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



And then you can map the fields between the helpdesk and the chosen SharePoint list. Only four (4) fields are available for mapping – Problem Category, Problem Type, KB Subject, KB Solution. If the selected 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. Simple select the 'NEW LIST FIELD' from the corresponding drop down.



**Screenshot:** Fields mapping tool where the mail fields are mapped to SharePoint List Fields

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 and your team members are ready to document new KB articles, and use this collective knowledge base for solving repetitive support queries from your end users.



### 6.3 Administration: Drop down lists – Problems, Statuses and Custom Fields

To allow technicians to add extra meaningful information to trouble tickets, apart from the ones extracted from the email, helpdesk manager can compile and maintain a list of problem categories and types, statuses and any number of custom fields drop down values in the helpdesk settings data source list. So that these drop-down lists are deployed to all the technicians and available in their Outlook, for tagging new trouble ticket when it is raised from an email.

Printer in Lab 5 not working! - Discussion

Format Text Review

SharePoint List: AX Ticket Tracker (http://bytestation/site1)

Issues Related KBs

**Assignment**

Category: Hardware  
Type: Keyboard

Apply Default: ☐ Technicians ☐ SLA

Self: AssistMyTeam

Remove

Service Level: Urgent

Response Date: 31/01/2022 11:00:00

Due Date: 01/02/2022 10:00:00

Importance: Not Mapped: 'Importance'

Status: In Progress

Time Spent: Total 23 (Minutes)

Add New (Minutes)

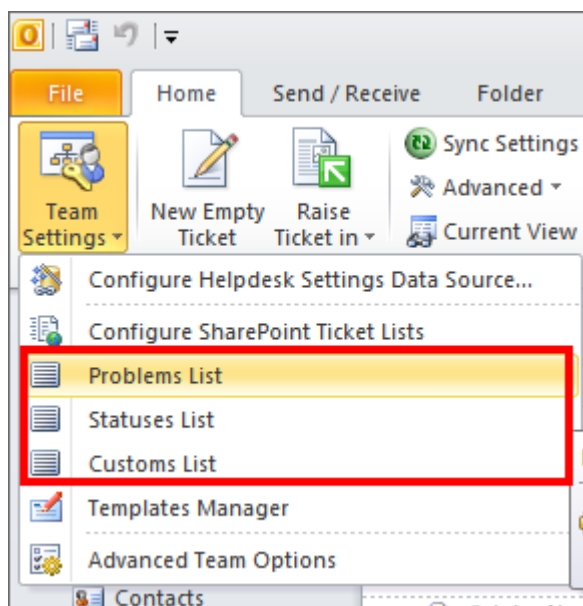
Accepted  
Completed

Update Issue

Pick From...

- Technicians List
- GAL
- SharePoint
- Reply to Caller
- Reopen
- Reject
- Generate KB
- Delete
- Save As Draft

The problems list, statuses list and customs list can be found under **Team Settings** drop menu.



### 6.3.1 Problems List

The problem consists of two sub-parts – Problem Category and Problem Type.

**Problem Categories:** 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, besides the other two rates - technician, caller department.

**Problem Types:** 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 a technician/manager can choose from and tag a trouble ticket. When a technician 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 technicians etc.

| Team Settings : Problems List  |                           |                  |
|--|---------------------------|------------------|
| <div> <div>✓</div> <div>Apply</div> <div>Save</div> <div>Exit</div> </div> |                           |                  |
| Problem Categories   | Problem Types             |                  |
| Categories   | Problem Type              | Problem Category |
| 1 Hardware   | 1 Airport Base Station    | Hardware         |
| 2 Software   | 2 Apple Rental            | Contracts        |
| 3 Sales  | 3 Apple TV                | Hardware         |
| 4 Staffs   | 4 Apple Wireless Keyboard | Hardware         |
| 5 Procurements   | 5 Apple Wireless Mouse    | Hardware         |
| 6 Inventory  | 6 AppleCare               | Contracts        |
| 7 Contracts  | 7 Buy Back Scheme         | Contracts        |
| 8 Payments   | 8 iPhone 3G               | Hardware         |
| 9 Bookings   | 9 iPhone                  | Hardware         |
| 10   | 10 iPod Classic           | Hardware         |
| 11   | 11 iPod Nano              | Hardware         |
| 12   | 12 iPod Shuffle           | Hardware         |
| 13   | 13 iPod Touch             | Hardware         |

Once you have saved this problems list, the problem drop down fields in all the chosen SharePoint ticket lists will also be automatically updated with the new list.

Due Date  12 AM 00

Problem Category  value:

Problem Status

Problem Type  value:

Problem Category: Choice Drop Down

Problem Status

Problem Type

Resolved ☐

Resolved Date

Caller Company

Caller Contact Number

Caller Email

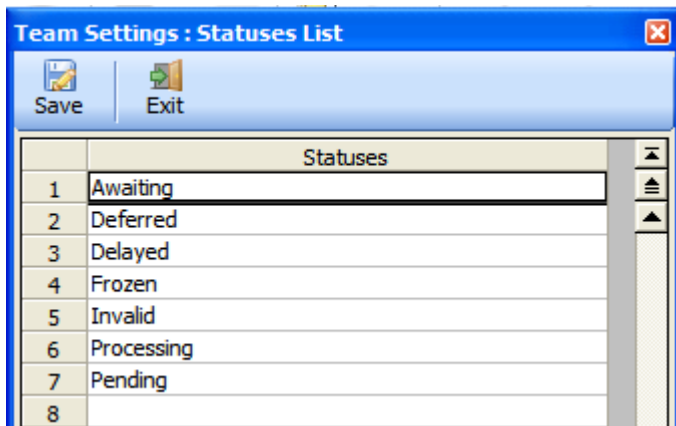
Caller Name

Problem

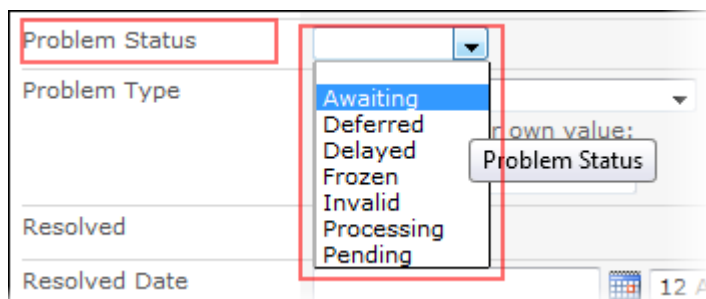


### 6.3.2 Statuses list

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



Once you have saved this statuses list, the status drop down fields in all the chosen SharePoint ticket lists will also be automatically updated with the new list.

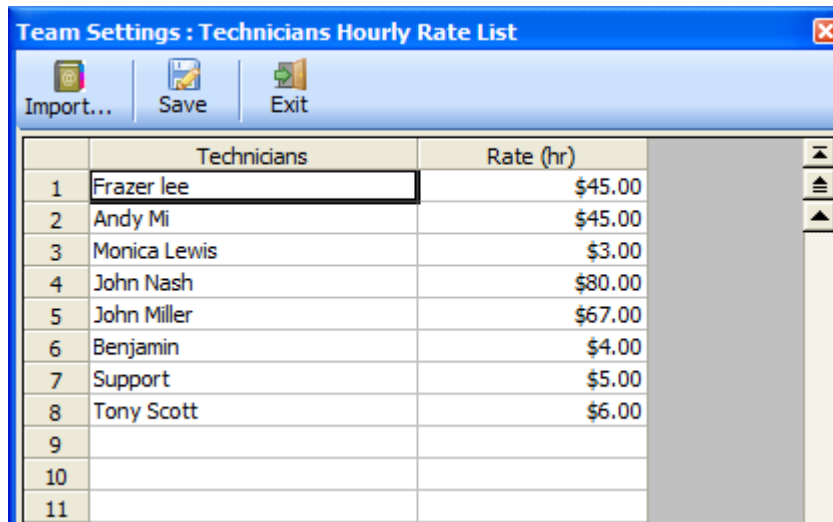




### 6.3.3 Technicians Rates

In OLAP statistics and summary reports, the total cost (on the time spent on working and resolving trouble ticket) can be computed using the rates from different dimensions. One of them is the rate specified for each technician. So, here, you can maintain a technicians-rate list.

*Team Settings > Technicians Rate List*



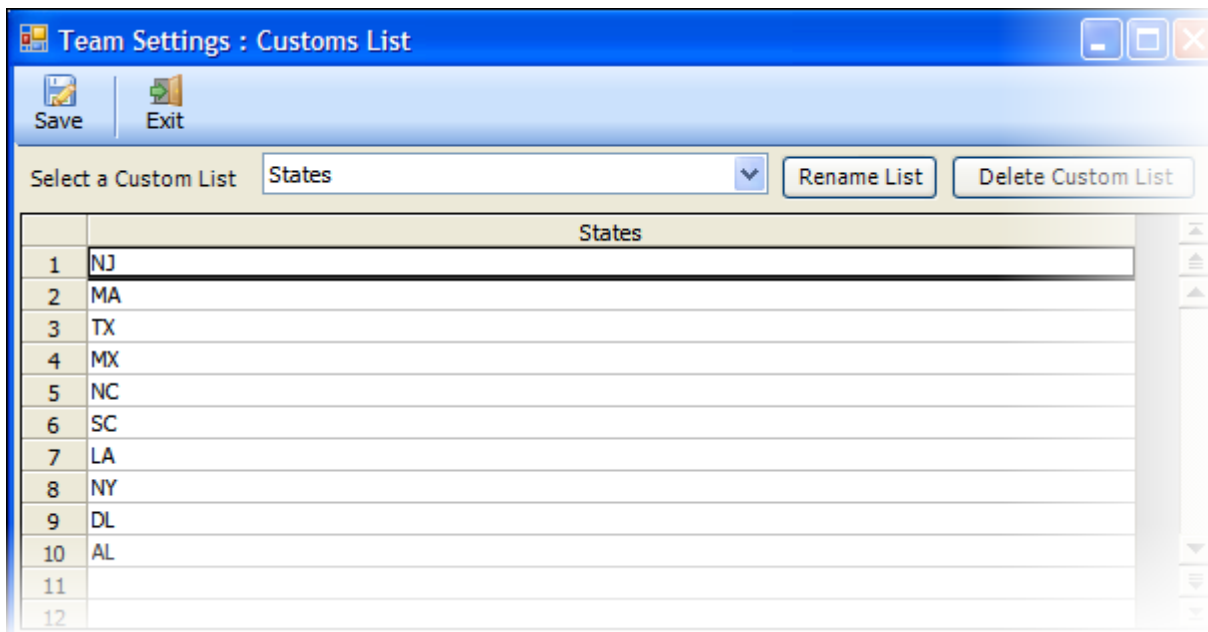
|    | Technicians  | Rate (hr) |
|----|--------------|-----------|
| 1  | Frazer lee   | \$45.00   |
| 2  | Andy Mi      | \$45.00   |
| 3  | Monica Lewis | \$3.00    |
| 4  | John Nash    | \$80.00   |
| 5  | John Miller  | \$67.00   |
| 6  | Benjamin     | \$4.00    |
| 7  | Support      | \$5.00    |
| 8  | Tony Scott   | \$6.00    |
| 9  |              |           |
| 10 |              |           |
| 11 |              |           |

You can enter the technician name, or import them from the address book (Global Address List). The rate that you entered here for each technician will be taken hourly by default. However, you can set it to take by for X number of hours or day, under the **Team Settings > Advanced Settings > Statistics** tab.

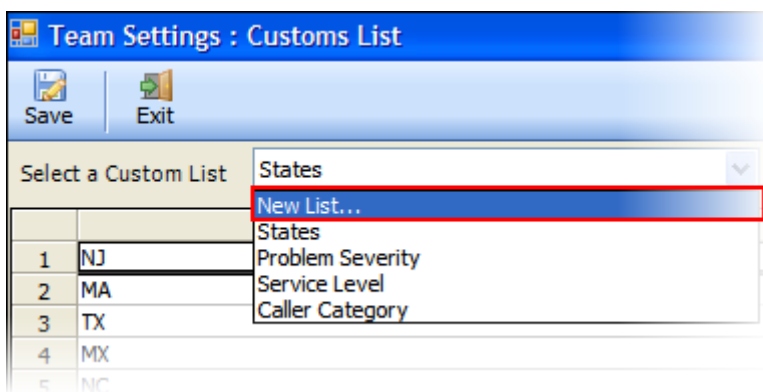


### 6.3.4 Custom Lists

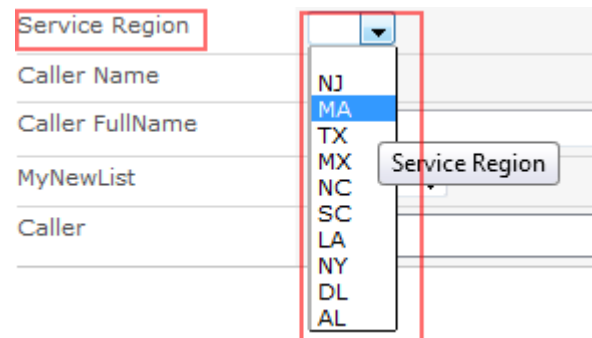
As a helpdesk manager, you can deploy any number of custom fields that take a drop down lists, in order to feed additional information on the caller, case or on the problem itself.



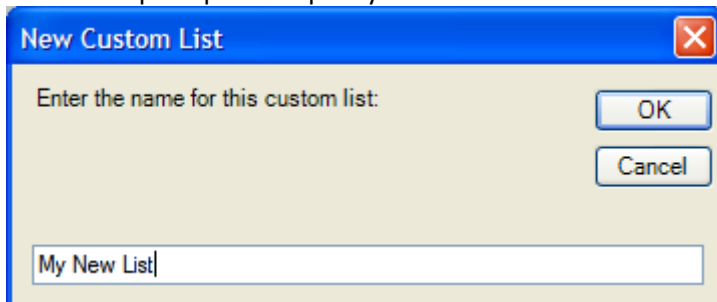
To create a new custom list, click the 'New List...' option from the drop down list, as show below:



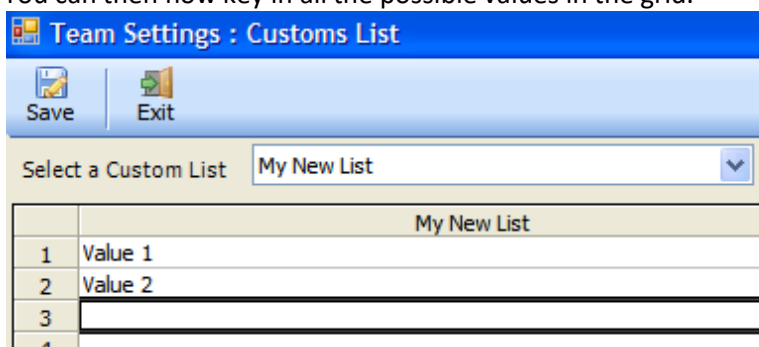
Once you have saved the entire customs list, the corresponding mapped SharePoint fields that are mapped to these custom fields will be updated automatically, with these new drops down lists in all the chosen SharePoint ticket lists.



You will be prompted to specify a name for the custom list.



You can then now key in all the possible values in the grid.

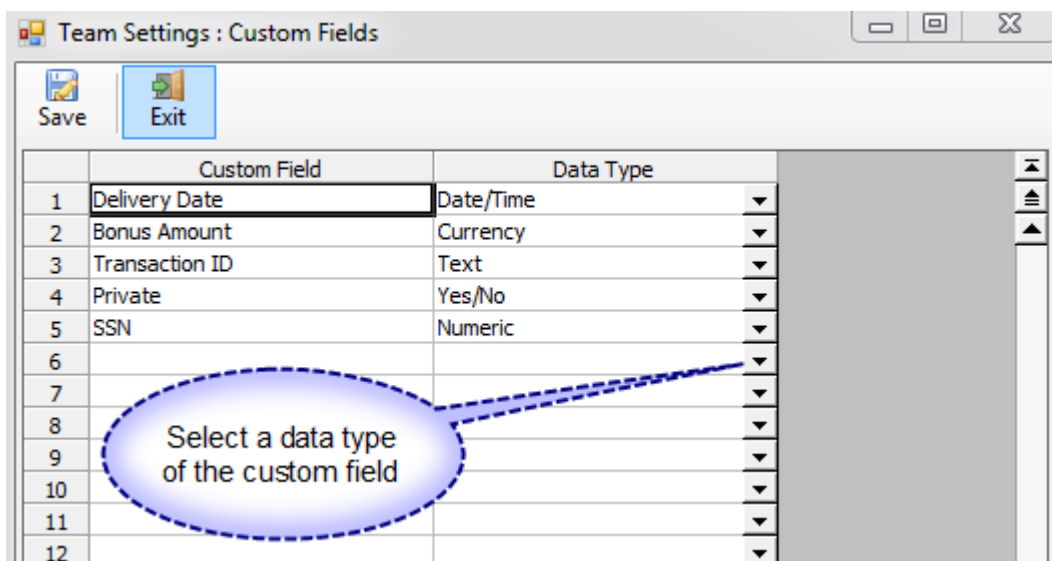


### 6.3.5 Custom Fields (that takes varied data types)

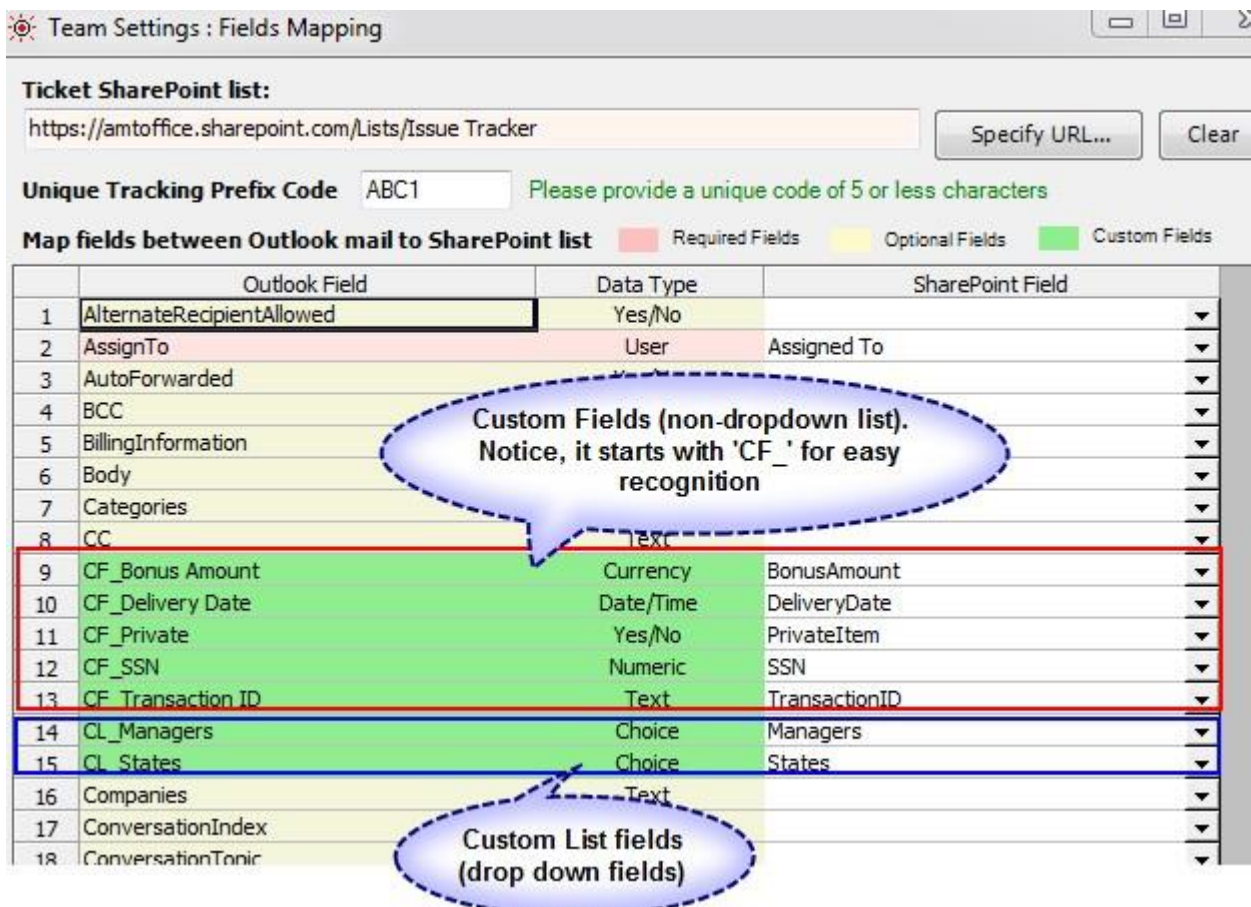
You can deploy any number of custom fields that take different data types and these fields will be available in the Ticket form in Outlook. So, when you are raising a ticket from an email or phone call, you can fill in the value directly.

The followings data types are supported for custom fields:

- Currency
- Choice
- Date/Time
- Numeric
- Text
- Yes/No



In the custom Fields panel, you can configure a master list of fields that you want to use in the Ticket form in Outlook. Enter the name of the custom field, followed by selecting the data type. Note that, when you enter the name of the custom field, avoid using symbols and other non-alphanumeric characters. Once you have compiled your list of custom fields, save it.



Now, these custom fields will be available under the fields mapping tool, where you can map each field to a SharePoint list field. If there are no existing fields in SharePoint list that matches that data type, you can dynamically create one from within



the mapping tools. When you map a custom field to a SharePoint list field, you are technically deploying that custom field to that particular SharePoint list. The custom fields (non drop-down lists) would appear with 'CF\_' prefix (for recognition). Notice that custom fields are colored green. If some of the custom fields are not required for that particular SharePoint list, you can ignore the mapping for that custom field (that is, you can leave it empty). Now, save the mappings.

Printer in Lab 5 not working! - I

File Discussion Insert Options Format Text Review

### Resolved Issue #11

SharePoint List AX Ticket Tracker (<http://bytestation/site>)

Issue Info Associated Users Related Issues Related KBs

|                  |                              |
|------------------|------------------------------|
| ID               | ATT-11                       |
| Created          | 28/01/2022 22:44:00 (bahrur) |
| Request Received |                              |
| First Response   |                              |
| Modified         | 28/01/2022 23:14:00 (bahrur) |
| Completed On     | 28/01/2022 23:14:00          |
| Completed By     |                              |

**Assignment**

|                     |   |
|---------------------|---|
| Category            | Hardware  |
| Type                | Keyboard  |
| Apply Default       | <input type="checkbox"/> Technicians <input type="checkbox"/> SLA |
| Self                | AssistMyTeam  |
| Remove              |   |
| Service Level       | Urgent  |
| Response Date       | 31/01/2022 11:00:00   |
| Due Date            | 01/02/2022 10:00:00   |
| Importance          |   |
| Status              | In Progress   |
| Time Spent          | Total 23 (Minutes)  |
|                     | Add New (Minutes)   |
| Specify Ticket Rate | Rate 0  |

**Caller**

|               |   |
|---------------|---|
| Name          | John Kinsley  |
| Email         | john.kinsley@assistmyteam.com                                     |
| Phone         | +61 457434909   |
| Mobile        | +61 457434909   |
| Address       | 245, 24th St. Peter Street, Coogee, NSW 5635                      |
| Company       | Angel Heart Hospital  |
| Apply Default | <input type="checkbox"/> Technicians <input type="checkbox"/> SLA |

**Custom Fields**

|                  |                                     |                 |      |
|------------------|-------------------------------------|-----------------|------|
| Asset ID         | DI2304                              | Company_Machine | Sys5 |
| Company          | Google                              |                 |      |
| Contracter Name  | KLM                                 |                 |      |
| Cost Center      | £34.00                              |                 |      |
| Fruits           | Grapes                              | Fruits_Type     | F4   |
| Order Note       | Sample comment                      |                 |      |
| Premium Customer | <input checked="" type="checkbox"/> |                 |      |
| Priority Level   | 1 - High                            |                 |      |
| Quantity Ordered | 454.00                              |                 |      |
| Reference Number | DF2324343                           |                 |      |
| Ship Date        | 28/01/2022 00:00:00                 |                 |      |
| States           | NC                                  |                 |      |
| Support Region   | East                                |                 |      |

When you raise a new ticket from an email, you will see the custom fields of non-drop down lists available for feeding a value. Notice that, in the date/Time custom field, you can double click the cell to popup the date picker. Similarly, in the Yes/No custom field, there will be a checkbox, and so on.





These custom fields are also available in the Summary Reports (at the end of the variables list).

**Tickets Summary Report**

Select Time Period: This Week

Filter by (Optional): None

Export To...

Select a SharePoint Ticket List: Issue Tracker (https://amtooffice.shar)

Specify a Report Type: Tickets Raised

Generate Report

Select fields to be included

- ☐ Total Cost
- ☐ Open Duration
- ☐ Open Duration
- ☐ Resolution Duration
- ☐ Resolution Duration
- ☐ Elapsed Duration (Mins)
- ☐ Elapsed Duration (Hrs)
- ☒ Managers
- ☒ States
- ☒ Delivery Date
- ☒ Bonus Amount
- ☒ Transaction ID
- ☒ Private
- ☒ SSN

**Report**

Generated by :  
Time : 1/19/2012 10:38:39 PM

Tickets Raised : This Week[1/15/2012 to 1/21/2012] - 22

| ID | Technician      | Caller Name                  | Caller Email |
|----|-----------------|------------------------------|--------------|
| 1  | Provide Support | transcript@providesupport.co |              |

These custom fields will also be available in the OLAP Statistics tool. Here interesting observation is, if the custom fields are of currency or numeric data types (measurable entity, that is), they will appear in the Measures group. This is handy, if you want to quantify other dimensions of the helpdesk with this particular custom field. Example, Bonus Amount is a currency field and SSN is a numeric field. Both are available in the Measures group.

**Issue Tracker - OLAP Statistics**

File Views

Open Offline Cube... Predefined Views... Open Vi

Grid Chart

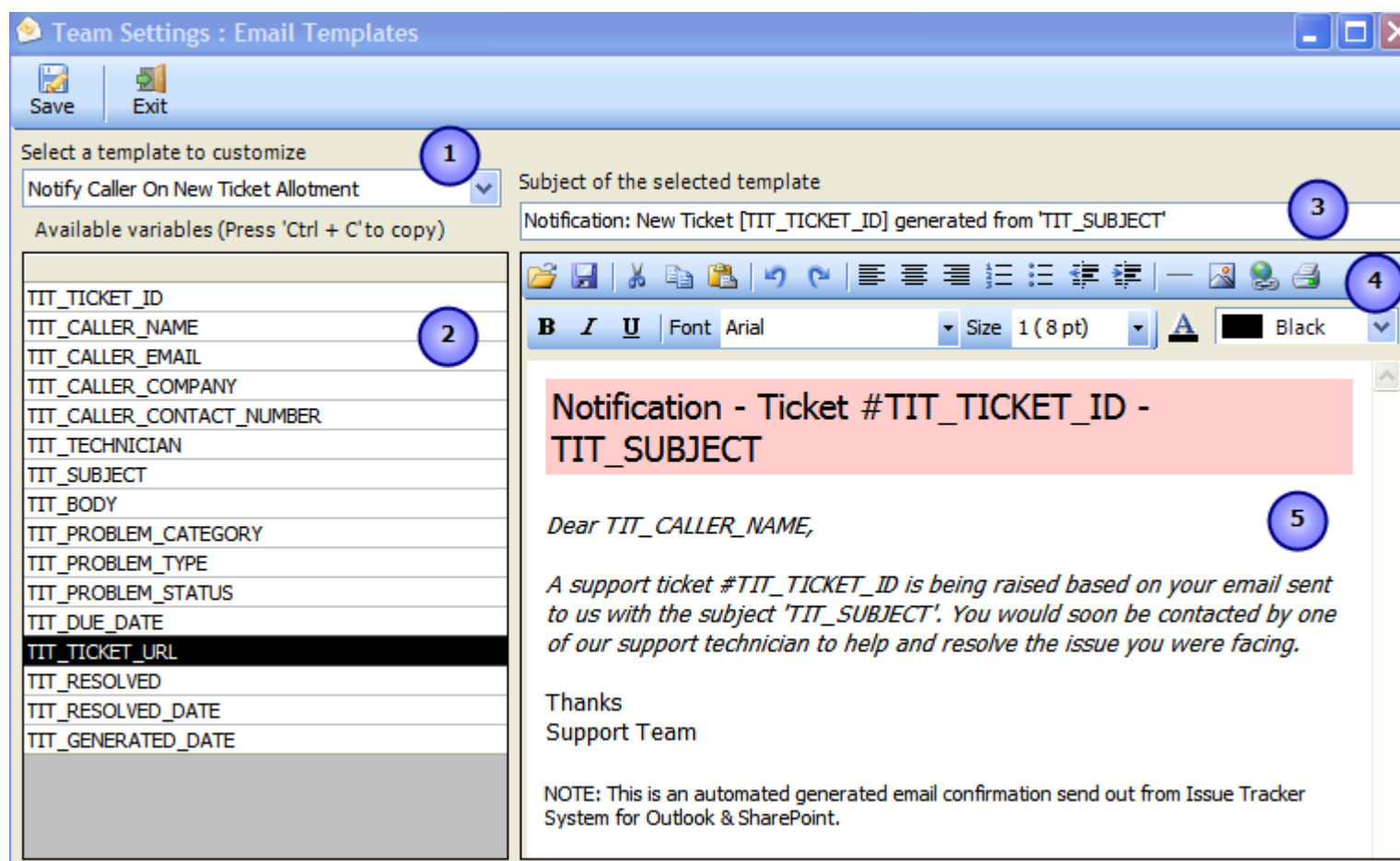
**Cube structure**

- Measures
  - Average Time Spent
  - Bonus Amount
  - Elapsed Duration (Hrs)
  - Elapsed Duration (Mins)
  - Open Duration (Hrs)
  - Open Duration (Mins)
  - Resolution Duration (Hrs)
  - Resolution Duration (Mins)
  - SSN
  - Ticket Rate
  - Tickets
  - Time Spent
  - Total Cost
- Callers
  - Custom Fields
    - Bonus Amount
    - Delivery Date
    - Managers
    - Private
    - SSN
    - States
    - Transaction ID
  - Date Created
  - Date Due
  - Date Modified
  - Date Resolved
  - Delivery Date
  - Problems
  - Ticket
  - Technician Name

All the custom fields are listed under the 'Custom Fields' group as hierarchical members. You can drag or use these custom fields in the rows and columns areas of the chart or grid. Finally, custom fields with Date/Time data type will appear as composite hierarchy in the form of Year > Quarter > Month > weeks > Day > Hours > Minutes etc.... For example, Delivery Date below is one of the custom fields with the date/time data type.

## 6.4 Administration: Templates Manager

Issue Tracker uses email templates for sending out notifications and reminders to callers and technicians. Email notifications take HTML format. Automated emails are sent out directly when a relevant event occurs and the whole exercise is transparent to the technicians.



1

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

| Template  |   | Purpose   |
|---|---|---|
| Notify Caller On New Ticket Allotment           | - | HTML template used on automated notification email sent to the caller when a trouble ticket is logged in SharePoint.  |
| Notify Technician On Ticket Assignment          | - | HTML template used on automated notification email that is sent out to a technician, informing about the assignment of the ticket.  |
| Notify Technician On Reply Received             | - | HTML template used on automated notification email that is sent out to the assigned technician when there is an escalation from the caller. (i.e., when a caller replies to an existing trouble ticket) |
| Notify Admin Specified Users on New Ticket      | - | HTML template used on automated notification email that is sent out to group of users that is specified by the helpdesk administrator, when a new trouble ticket is generated.                          |
| Notify Caller when Ticket is marked as Resolved | - | HTML template used in the automated email to the caller to notify about the successful resolution to the allotted ticket  |
| Notify Technician on Ticket Due Date Lapsed     | - | HTML template used in the automated email to the assigned technician when the due date of a ticket is about to be overdue   |
| Notify Managers on Ticket Due Date Lapsed       | - | HTML template used in the automated email to the administrator specified users when the due date of a ticket is overdue.  |

|  |   |  |
|--|---|--|
|  |   |  |
| <i>Notify Technician on Ticket Reopening</i> | - | HTML template used in the automated email to the concerned technicians when a resolved ticket has been re-opened |

2

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:

| <b>Variable</b>             |   | <b>Purpose</b>  |
|-----------------------------|---|---|
| <i>TIT_TICKET_ID</i>        | - | Ticket Number of the generated trouble ticket.  |
| <i>TIT_SUBJECT</i>          | - | Subject of the email or the support ticket  |
| <i>TIT_BODY</i>             | - | The body or description field of the email sent by the caller   |
| <i>TIT_CALLER_NAME</i>      | - | Name of the caller or sender of the email   |
| <i>TIT_CALLER_EMAIL</i>     | - | Email of the caller or sender of the email  |
| <i>TIT_CALLER_COMPANY</i>   | - | Company name of the caller or the sender of the email   |
| <i>TIT_CONTACT_NUMBER</i>   | - | Contact number of the caller or the sender of the email   |
| <i>TIT_TECHNICIAN</i>       | - | Name of the technician assigned to attend and resolve the trouble ticket                              |
| <i>TIT_PROBLEM_CATEGORY</i> | - | Problem Category to which the trouble ticket comes under  |
| <i>TIT_PROBLEM_TYPE</i>     | - | Problem Type to which the trouble ticket comes under  |
| <i>TIT_PROBLEM_STATUS</i>   | - | Status of the problem of the trouble ticket   |
| <i>TIT_DUE_DATE</i>         | - | Due Date by which the trouble ticket should be resolved   |
| <i>TIT_TICKET_URL</i>       | - | The hyper-link URL of the SharePoint ticket item that can be embedded in an email for easy reference. |
| <i>TIT_RESOLVED</i>         | - | Ticket resolution flag – TRUE if marked resolved, FALSE if ongoing.                                   |
| <i>TIT_RESOLVED_DATE</i>    | - | Date/time the ticket was marked resolved.   |
| <i>TIT_GENERATED_DATE</i>   | - | Date/time the ticket was generated/created in SharePoint  |

3

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

4

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.

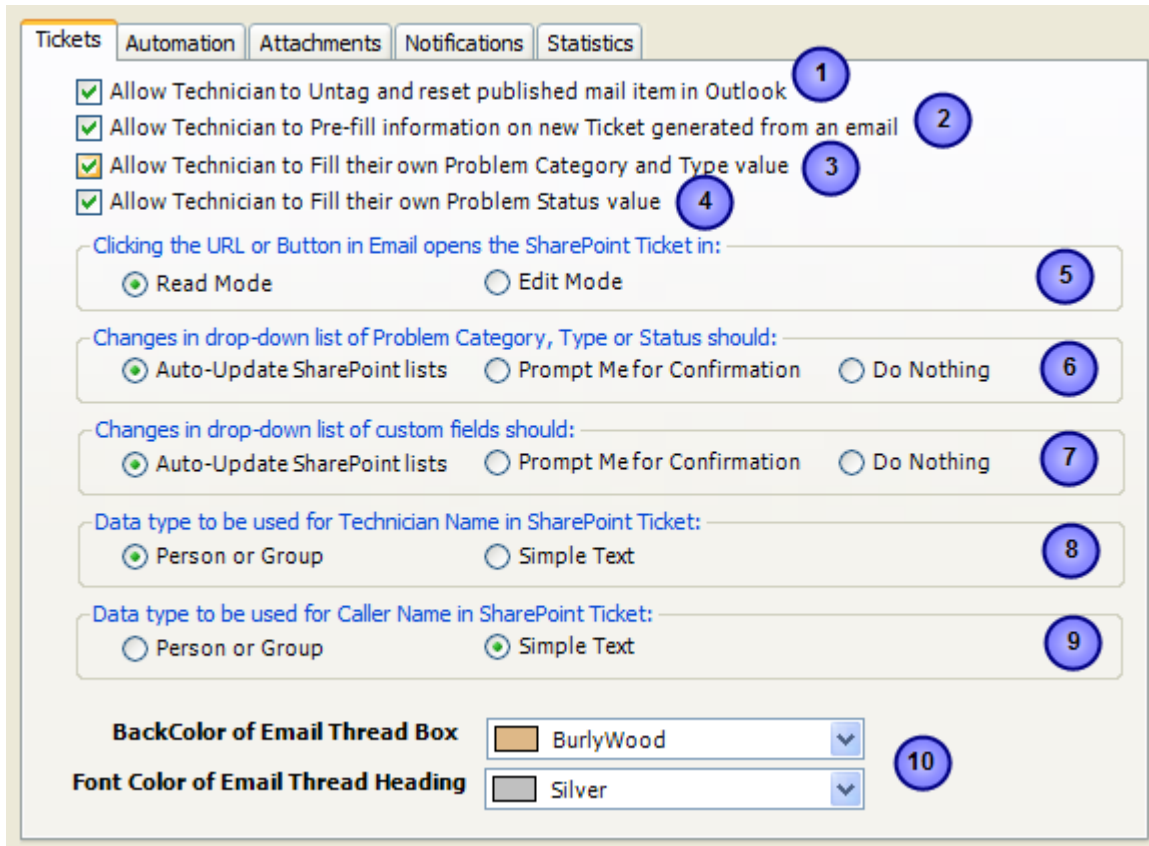
5

The actual content of the email notification - Description or Body.



## 6.5 Administration: Advanced Team Options

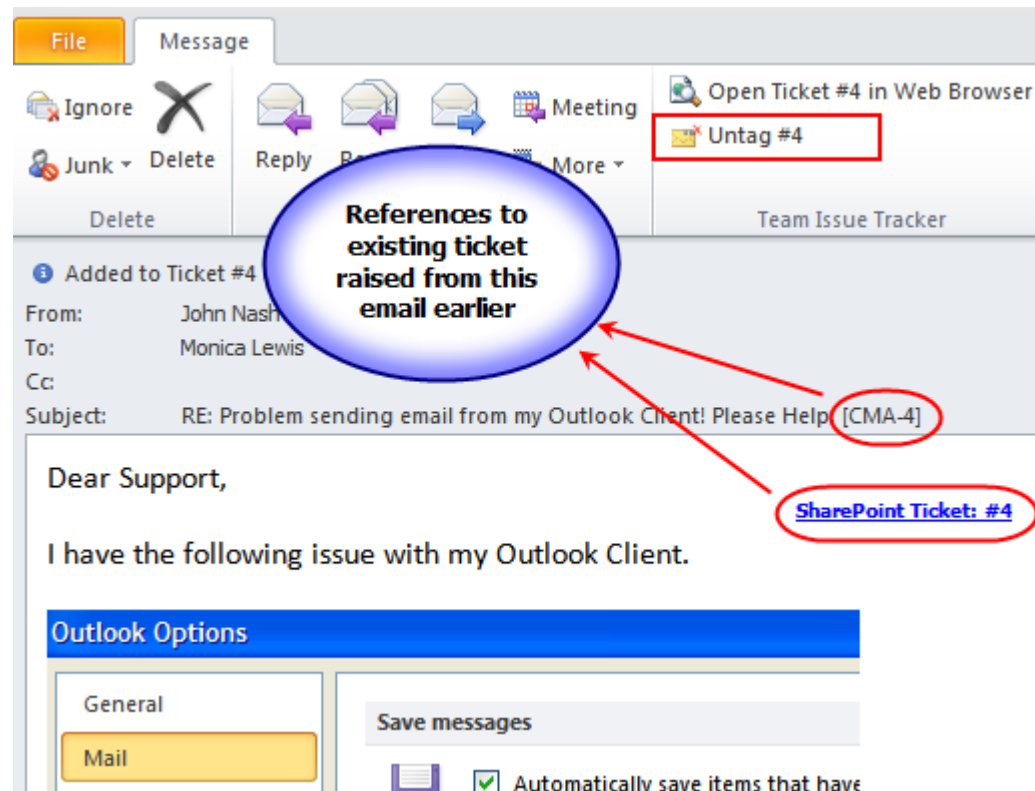
### 6.5a Ticket Settings



1

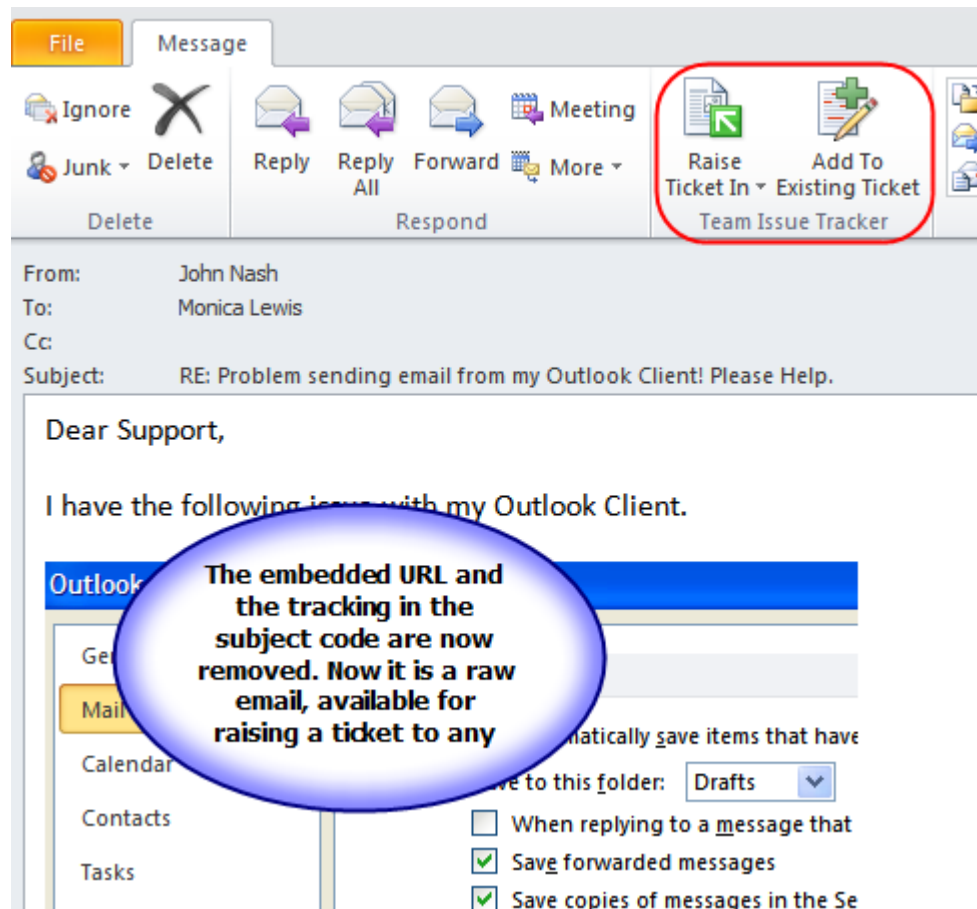
#### 6.5.1 - Allow Technician to Un-tag and reset published mail item in Outlook

When you raised a trouble ticket from an email in Outlook, the email is tagged and marked published or processed internally in Outlook, so that, it is not available for raising another trouble ticket. That is, when you select an email that was raised, it will not give the technician the 'Raise Ticket in..' drop down menu in the Issue Tracker toolbar or ribbon in Outlook.



If you want to change this, (i.e., allow raising ticket from an email multiple times, say to multiple SharePoint lists), you can enable this option, so that, the technician can simply click the button 'Untag #Ticket ID', to remove references of any earlier ticket that was tagged to an email, and raise a trouble ticket to another SharePoint list.





2

#### 6.5.2 - Allow Technician to Pre-fill information on new Ticket generated from an email

When a technician wants to raise a trouble ticket from an email in Outlook, you can allow the technician to feed more information to the ticket before it is raised to a SharePoint list. This is done through the 'New Ticket' form that is shown when the technician clicks one of the SharePoint list to raise the ticket to.

This option is by default enabled. If you disabled it, when the technician raises a ticket from an email, the ticket item will be directly created in the chosen SharePoint list, and any further information such as problem category, type, status, due date, technician or any other custom fields would need to be feed directly from the ticket form in SharePoint.





3

### 6.5.3 - Allow technician to add their own Problem Category and Type Value

When this option is enabled, individual technician would be able to add their own Problem category that does not exist in the Problems list defined by the helpdesk manager.

When this option is not enabled:

Phone: +4488434343  
Company: AMT

**Problem Information**

Category: Software  
Type: iTunes  
Status: Deferred

When this option is enabled:

**Caller Information**

Name: John Nash  
Email: John.Nash@AssistMyTeam.local  
Phone: +4488434343  
Company: AMT

**Problem Information**

Category: Software  
Type: Adobe  
Status:

In the same way, this feature of allowing the technician to add their own problem value instead of selecting one from the drop down list is enforced in the SharePoint list too.

When this option is not enabled:

[Click for help about adding basic HTML formatting.](#)  
No existing entries.

Due Date: 9/6/2011 9 AM 18

Problem Category: Software

Problem Status: Processing

Problem Type: Office 2008

Resolved: ☐

Resolved Date:

Caller Company: AMT

Caller Contact Number: +4488434343

Caller Email: JohnNash@AssistMyTeam.local

When this option is enabled:



No existing entries.

|                       |   |
|-----------------------|---|
| Due Date              | 9/6/2011 9 AM 18  |
| Problem Category      | <input checked="" type="radio"/> Software<br><input type="radio"/> Specify your own value:    |
| Problem Status        | Processing  |
| Problem Type          | <input checked="" type="radio"/> Office 2008<br><input type="radio"/> Specify your own value: |
| Resolved              | <input type="checkbox"/>  |
| Resolved Date         |   |
| Caller Company        | AMT   |
| Caller Contact Number | +448843434  |
| Caller Email          | JohnNash@AssistMyTeam   |

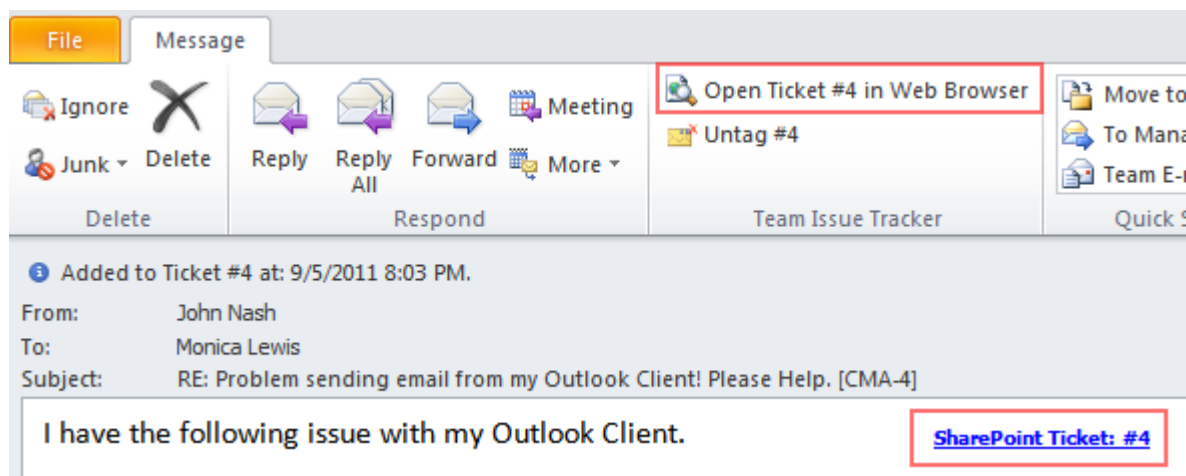
Editable. For eg., you can type in your own value, instead of choosing one from the drop down list

#### 4 6.5.4 - Allow technician to add their Problem Status value

Likewise with Problem Category and Type fields, you can also allow the technician to add their own problem status value, instead of choosing one from a pre-defined drop-down list.

#### 5 6.5.5 - Clicking the URL or button in Email Opens the SharePoint ticket in

You can choose if the SharePoint ticket list item will be opened in read only state or in edit state in your web browser when you click the 'Open Ticket' button or the 'SharePoint Ticket #Ticket ID' hyperlink in the email body.



#### 6 6.5.6 - Changes in drop down list of Problem Category, Type or Status should

**Auto-update SharePoint lists** – if this is chosen, when the helpdesk manager add new values to the Problems or Statuses drop down lists, Issue Tracker Admin tool would automatically update all the problem and status fields of the configured SharePoint ticket lists and sync the new additions or changes in the drop down lists back to the SharePoint. This way, the drop-down lists would be up to date in the SharePoint ticket lists.

**Prompt me for Confirmation** – If this option is chosen, the helpdesk manager will be prompted for a confirmation, to update the drop down lists of the Problem and Status field of the configured SharePoint ticket lists, whenever, any changes or addition is done in Outlook.

**Do Nothing** – If this option is chosen, update to problem and status fields of the SharePoint ticket lists is not executed when the helpdesk manager makes changes to the global problem and status lists in Outlook.

#### 7 6.5.7 - Changes in drop down list of custom fields should

**Auto-update SharePoint lists** – if this is chosen, when the helpdesk manager add new values to any of the custom lists, Issue Tracker Admin tool would automatically update all the corresponding drop-down list of the custom fields in the configured SharePoint ticket lists. This way, the drop down lists for any number of custom fields would be up to date in the SharePoint ticket lists.

**Prompt me for Confirmation** – If this option is chosen, the helpdesk manager will be prompted for a confirmation, to update the drop down lists of any custom fields in the configured SharePoint ticket lists, whenever, any changes or addition is done in the custom lists in Outlook.

**Do Nothing** – If this option is chosen, update to custom fields of the SharePoint ticket lists is not executed when the helpdesk manager makes changes to the global custom lists in Outlook.

8

#### 6.5.8 - Data type to be use for Technician Name in the SharePoint Ticket

**Person or Group** - If the person/group is selected, you will see that, the data type for 'AssignTo' field displays 'User' in the mapping tool. It means, you can only map this 'AssignTo' field to a person or group data type of the SharePoint list.

**Team Settings : Fields Mapping**

SharePoint list to which mails would be published to

Unique Tracking Prefix Code  Please provide a unique code of 5 or less characters

Map fields between Outlook mail to SharePoint list Required Fields Optional Fields Custom Fields

|   | Outlook Field             | Data Type | SharePoint Field |
|---|---------------------------|-----------|------------------|
| 1 | AlternateRecipientAllowed | Yes/No    |                  |
| 2 | AssignTo                  | User      | Assigned To      |
| 3 | AutoForwarded             | Yes/No    |                  |
| 4 | BCC                       | Text      |                  |
| 5 | BillingInformation        | Text      |                  |

Do note that, in the SharePoint ticket item, Issue Tracker add-in would try to use the equivalent user name as defined in the SharePoint site. For this to work, the email address of the technician should match in both the Active Directory (GAL) and the SharePoint site. If an equivalent user does not exist in the SharePoint site, the 'AssignTo' field in the SharePoint list would display empty.

**Simple text** – If a simple text data type is selected, whatever is displayed in the 'AssignTo' field when raising the ticket from Outlook is retained in the SharePoint list too.

9

#### 6.5.9 - Data Type to be used for Caller Name in the SharePoint Ticket

**Person or Group** - If the person/group is selected, you will see that, the data type for 'SenderName' field displays 'User' in the mapping tool. It means, you can only map this 'SenderName' field to a person or group data type of the SharePoint list.

|    |                     |           |                       |
|----|---------------------|-----------|-----------------------|
| 46 | ResolvedDate        | Date/Time | Resolved Date         |
| 47 | SenderCompanyName   | Text      | Caller Company        |
| 48 | SenderContactNumber | Text      | Caller Contact Number |
| 49 | SenderEmailAddress  | Text      | Caller Email          |
| 50 | SenderName          | User      | Caller                |
| 51 | Sensitivity         | Choice    |                       |
| 52 | Sent                | Yes/No    |                       |
| 53 | SentOn              | Date/Time |                       |

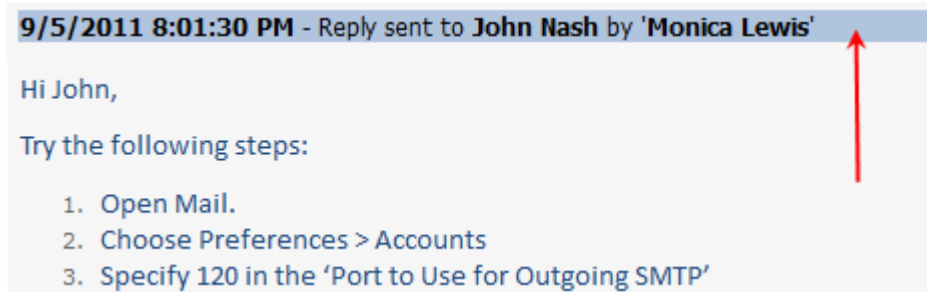
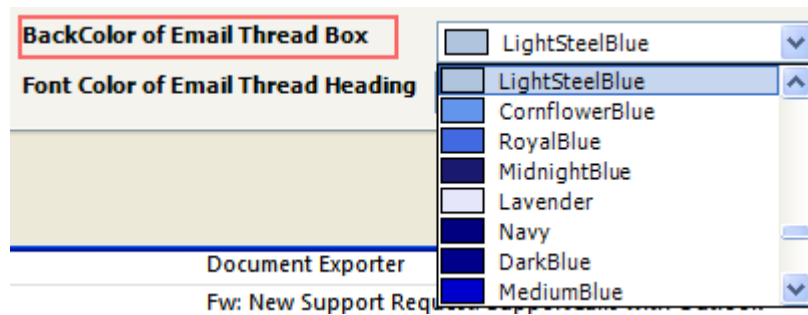
Do note that, in the SharePoint ticket item, Issue Tracker add-in would try to use the equivalent user name as defined in the SharePoint site. For this to work, the email address of the caller (or sender) should match in both the Active Directory (GAL) and the SharePoint site. If an equivalent user does not exist in the SharePoint site, the 'SenderName' field in the SharePoint list would display empty.

**Simple text** – If a simple text data type is selected, whatever is displayed in the 'SenderName' field when raising the ticket from Outlook is retained in the SharePoint list too.

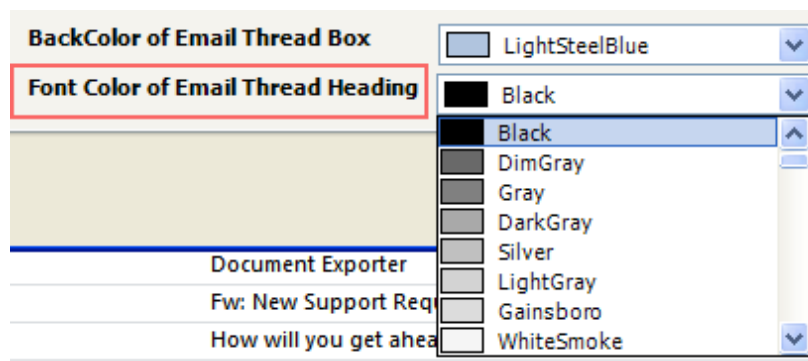
10

#### 6.5.10 - BackColor of Email Thread Box – you can specify the background color of the header box that displays the summary of the email snippet that was added to the ticket.





**Font Color of Email Threading Heading** – You can also choose the font color of the snippet box to your liking.



## 6.5b Automation Settings

Tickets Automation Attachments Notifications Statistics

- ☒ Sync Issue Tracking configurations from Team Settings Data Source at Outlook Start Up **1**
- ☒ Embed shortcut to the SharePoint Ticket URL into the processed Outlook mail item **2**
- ☒ Remove embedded ticket URL in outgoing email reply **3**
- ☒ Add Technician field in the Outlook view for tracking purpose **4**
- ☒ Automatically track incoming replies and update the SharePoint ticket **5**  
*Note: Applicable only to the Inbox folder of your primary mailbox*
- ☒ Automatically track outgoing replies and notifications and update the SharePoint ticket **6**  
*Note: Applicable only to the SentItems folder of your primary mailbox*
- ☒ Automatically add due date appointment into the technician's mailbox calendar **7**  
*This option will only work if the assigner has permission over the technician's mailbox*
- ☒ Maintain ticket Due Date schedules in this SharePoint Calendar **8**  
 - ☒ Use the following mailbox account for all outgoing automated notifications **9**  
 *Note: To use this feature, all technicians should have 'Send on behalf' permission granted over this account*
- ☒ Use the above common account when replying to a ticket in Outlook **10**

1

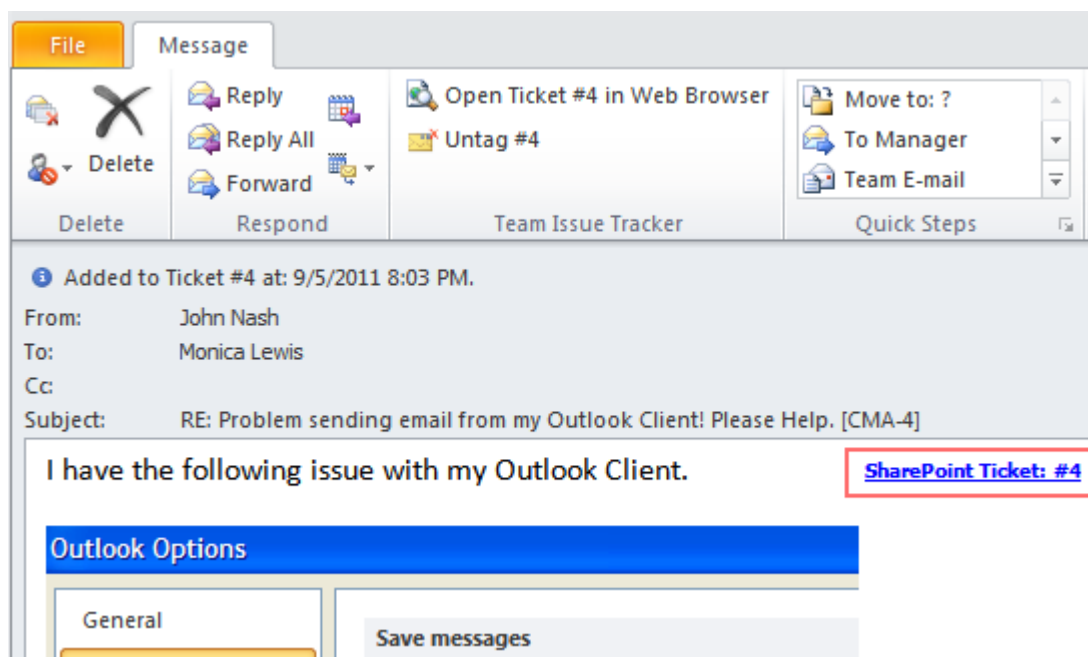
### 6.5.11 - Sync Issue Tracking configurations from Team Settings Data Source at Outlook Start up

Enable this option, if you want to have the manager chosen SharePoint ticket lists and their mappings to be sync automatically and deployed in Outlook when individual technician starts Outlook. With this feature, individual technician need not click the sync button, every now and then to retrieve the latest team settings and configurations that the helpdesk manager might have made.

2

### 6.5.12 - Embed shortcut to the SharePoint Ticket URL into the processed Outlook mail item

If enabled, Issue Tracker add-in will insert an URL hyperlink of the SharePoint ticket item to the Outlook mail item that was just raised. Clicking this hyperlink will open the corresponding SharePoint ticket item in your web browser.



3

### 6.5.13 - Remove embedded ticket URL in outgoing email reply

When you reply to an email that was raised to a trouble ticket earlier; you will see that the outgoing email retains the ticket URL that was embedded. If you want that this embedded URL should not be there in the reply to the caller, you can enable this option. Doing so, the embedded URL will be filtered out in run-time (yes, when you have clicked Send button).

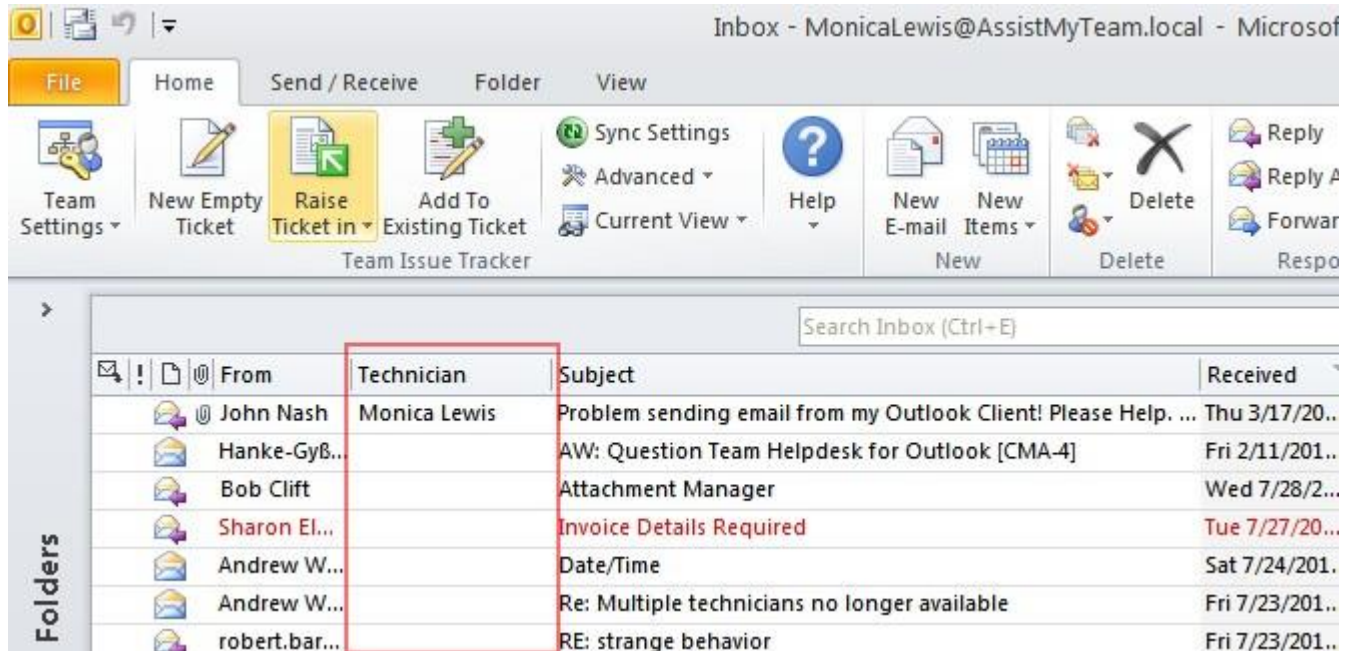




4

**6.5.14 - Add Technician field in the Outlook view for tracking purpose**

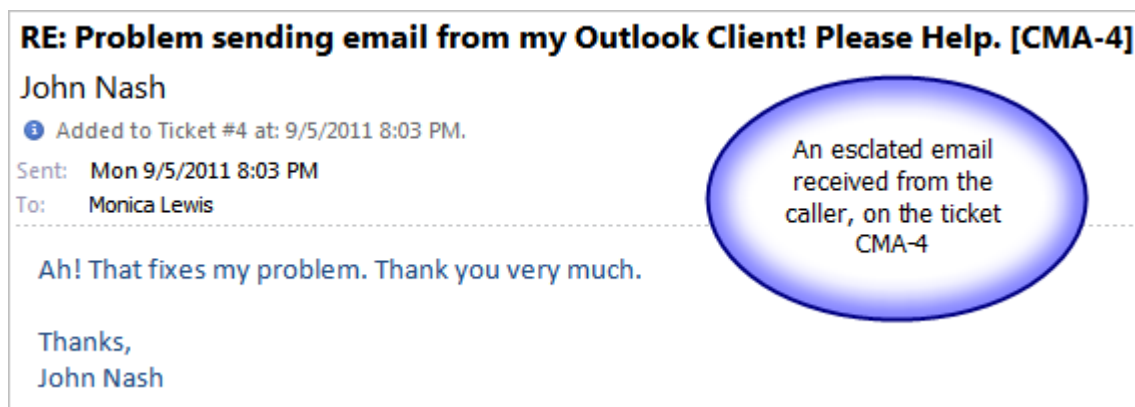
When you raise a trouble ticket from an email, and if you had assigned a technician to deal with that ticket, Issue Tracker can add a custom field 'Technician' in your Outlook view such that, it will store and display the assigned technician name. This is useful particularly if you have multiple technicians working on a shared mailbox, and you want a way of letting other technicians know who is currently being assigned to work on a particular ticket number, by simply looking in the 'Technician' column in their Outlook view.



5

**6.5.15 - Automatically track incoming replies and update the SharePoint ticket**

If you enable this option, Issue Tracker add-in will monitor the Inbox folder of the primary mailbox (available in the active Outlook profile) for any incoming emails that are related or in continuation to an existing SharePoint ticket item. When such an email is found, Issue Tracker would then automatically process it and update the body (description) field of the associated ticket item in the particular SharePoint list, to include the new escalation that was received.



With such automation, the SharePoint ticket item and description field will be updated live automatically, as and when the email is received. This greatly enhances the productivity of the helpdesk because, no technicians are required anymore to monitor the mailbox for new replies from caller, nor there is need to add and update the new information to the relevant ticket manually. Issue Tracker system automatically does that for you.



Issue Tracking - Problem sending email from my Outlook Client!...

View

Version History    Alert Me

Edit Item    Manage Permissions    Delete Item

Manage    Actions

Title: Problem sending email from my Outlook Client! Please Help.

Assigned To: bytepad\monica

Description: **9/5/2011 8:03:02 PM - Reply received from John Nash**

Ah! That fixes my problem. Thank you very much.

Thanks,  
John Nash

**New Attachments:** 952011 8-03 PM - RE- Problem sending email from my Outlook Client! Please Help

**9/5/2011 8:01:30 PM - Reply sent to John Nash by 'Monica Lewis'**

Hi John,

Try the following steps:

1. Open Mail.
2. Choose Preferences > Accounts
3. Specify 120 in the 'Port to Use for Outgoing SMTP'

Email response portion automatically added to the existing ticket item

Note that, only incoming emails that contain the tracking code in the subject would be automatically processed. You need worry about the risk of unrelated or private emails getting added inadvertently to the SharePoint ticket. If you have an email that does not have this code, but you want to relate that email to an existing SharePoint ticket item, then you will have to manually add the email to an existing ticket using the 'Add to Existing Ticket' button.

6

#### 6.5.16 - Automatically track outgoing replies and notifications and update the SharePoint ticket

If you enable this option, Issue Tracker add-in will monitor the **Outbox folder** of the primary mailbox (available in the active Outlook profile) for any outgoing emails that you sent out from Outlook. If a related email that is in continuation to an existing SharePoint ticket item is found, Issue Tracker would then automatically process it and update the body (description) field of the associated ticket item in the particular SharePoint list, to include the new escalation that was sent out.

**RE: Problem sending email from my Outlook Client! Please Help. [CMA-4]**

Monica Lewis

Added to Ticket #4 at: 9/5/2011 8:01 PM.

Sent: Mon 9/5/2011 8:02 PM

To: John Nash

Hi John,

Try the following steps:

1. Open Mail.
2. Choose Preferences > Accounts
3. Specify 120 in the 'Port to Use for Outgoing SMTP'

Hope this fixes the issue. Let us know about the outcome.

/AMT Support Team

Email response portion, sent out to the caller, automatically added to the existing ticket item

With such automation, the SharePoint ticket item and description field will be updated live automatically, as and when a response is sent out. This greatly enhances the productivity of the helpdesk because, no technicians are required anymore to add and update the new information that was sent out to the caller, in the relevant ticket manually. Issue Tracker system automatically does that for you.



Issue Tracking - Problem sending email from my Outlook Client!...

View

Version History    Alert Me

Edit Item    Manage Permissions    Delete Item

Manage    Actions

|             |  |
|-------------|--|
| Title       | Problem sending email from my Outlook Client! Please Help.   |
| Assigned To | bytepad\monica   |
| Description | <p><b>9/5/2011 8:03:02 PM - Reply received from John Nash</b></p> <p>Ah! That fixes my problem. Thank you very much.</p> <p>Thanks,<br/>John Nash</p> <p><b>New Attachments: 952011 8-03 PM - RE- Problem sending email from my Outlook Client! Please I</b></p> <p><b>9/5/2011 8:01:30 PM - Reply sent to John Nash by 'Monica Lewis'</b></p> <p>Hi John,</p> <p>Try the following steps:</p> <ol style="list-style-type: none"> <li>1. Open Mail.</li> <li>2. Choose Preferences &gt; Accounts</li> <li>3. Specify 120 in the 'Port to Use for Outgoing SMTP'</li> </ol> |

Email response portion (sent by the technician to the caller) automatically added to the existing ticket item

Note that, only outgoing emails that contain the tracking code in the subject would be automatically processed. If the outgoing copy of the email that does not have this code, they are ignored. So, you don't have to worry about unrelated or private emails getting added inadvertently to the SharePoint tickets

7

#### 6.5.17 Automatically add due date appointment into the technician's mailbox calendar

If this option is enabled, when you or the manager assigns the due date on a support ticket, Issue Tracker would automatically add a due date appointment into the assigned technician's calendar. Any change in the due date at later time will be automatically reflected to this existing due date appointment in the technician's calendar. This appointment is removed automatically when the corresponding ticket is resolved.

January 13 - 14, 2012

Search Calendar (Ctrl+E)

13 Friday    14 Saturday

3 pm

4<sup>00</sup>

5<sup>00</sup>

6<sup>00</sup>

7<sup>00</sup>

Due date appointment of the ticket added automatically into the calendar of the assigned technician

Due Date for Ticket #TNK-1 : Strange behaviour with i

Due Date for Ticket #CMS-5 : How do I configure acce

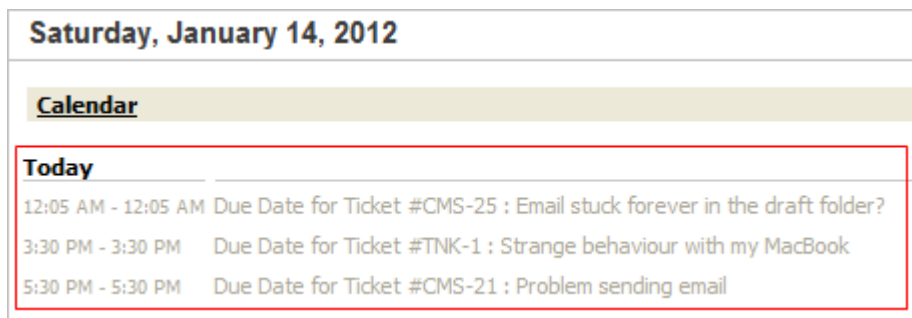
Due Date for Ticket #CMS-21 : Problem sending email

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

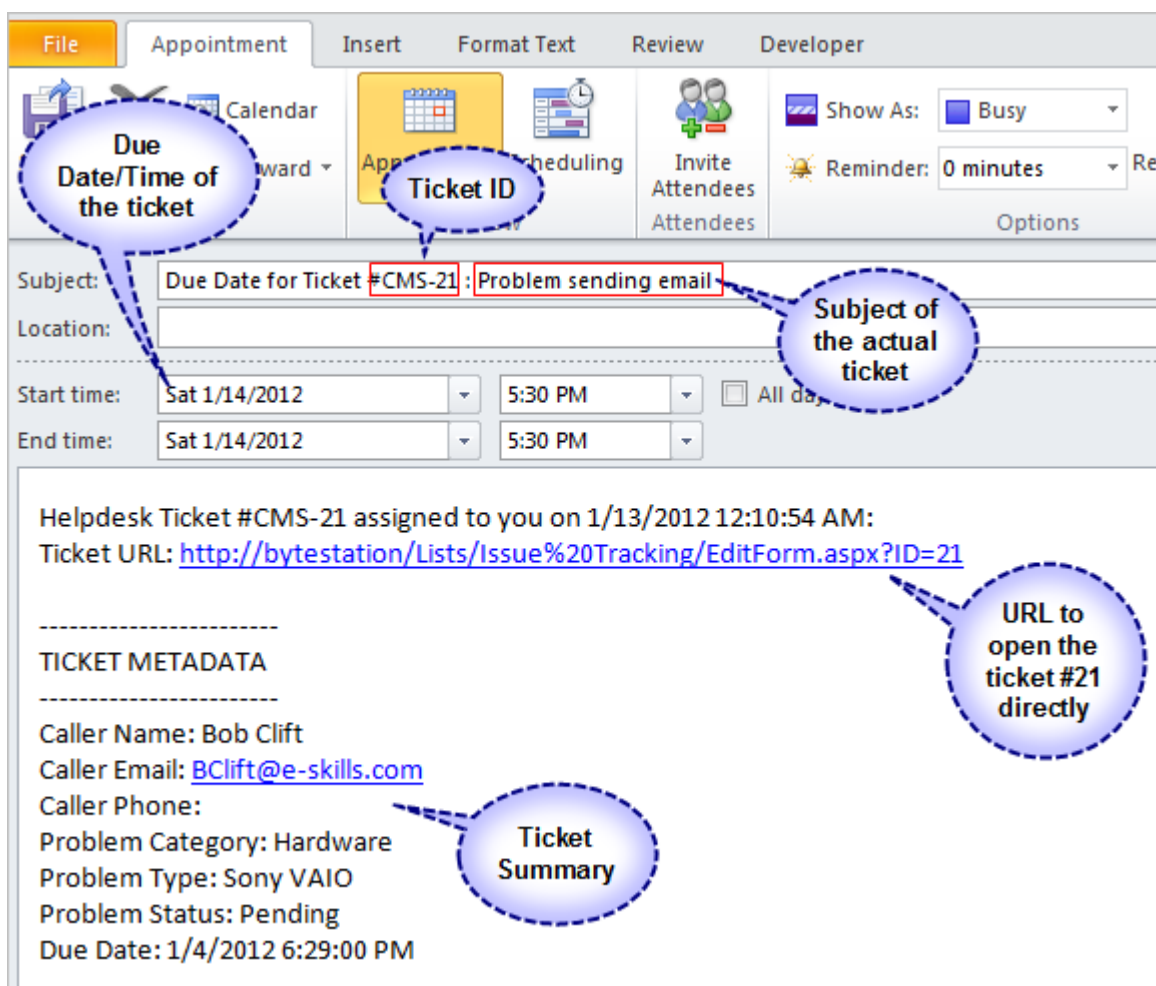
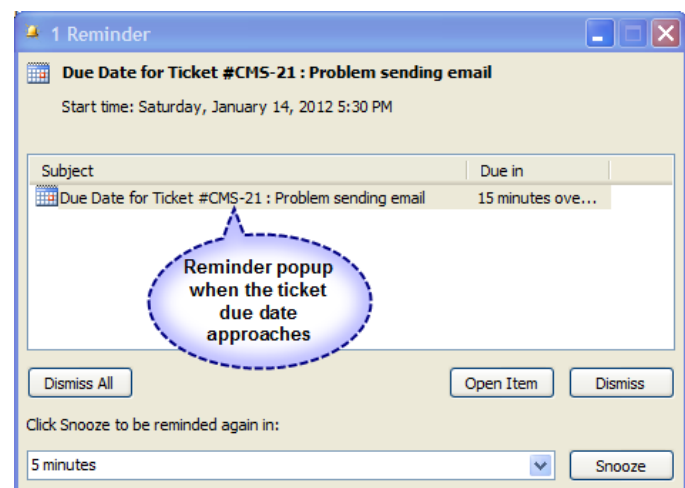




When tickets due date approaches, these appointments appear in summarized form on the main 'Outlook Today' page when the technician starts Outlook. This way, the technician gets to know which tickets are due today.



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



Notice the ticket details that are added into the due date appointment:

- the ticket number and subject is available in the appointment's subject
- the due date of the ticket is the same as that of the start time and end time of the appointment
- In the description field, there is a link to the actual SharePoint ticket, clicking which would open the ticket in your default web browser.
- The appointment description also informs the technician about the caller, and a summary of the problem



8

### 6.5.18 Maintain ticket Due Date schedules in this SharePoint Calendar

If this is enabled, Issue Tracker will add or update ticket due date schedules into this administrator specified SharePoint Calendar automatically. One benefit of maintaining such a ticket due date calendar is to allow helpdesk managers or other technicians to lookup for a suitable or empty schedule such that the assignment of due date take into the consideration other prior assignments which may already exist. This will help prevent due date clashes and increase efficiency of the helpdesk staffs.

The screenshot shows a SharePoint calendar interface. At the top, there are tabs for 'Site Actions', 'Browse', 'Events', and 'Calendar'. Below these are various icons for calendar management, including 'Day', 'Week', 'Month', 'Expand All', 'Collapse All', 'Calendars Overlay', 'Create View', 'Modify View', 'Create Column', 'Current View: Calendar', 'E-mail a Link', 'RSS Feed', and 'Connect to Outlook'. The main calendar area shows a weekly view for January 2012, with the date January 14th highlighted. The calendar displays several appointments with titles like 'Due Date for Ticket #CMS-32 : RE: Outlook database exporter'. The sidebar on the left includes 'Calendars in View' with 'Tickets Due Date' selected, and 'Libraries' with 'Site Pages' and 'Shared Documents' listed.

If you open the appointment, you will notice that, the ticket details, due date etc. are embedded for quick reference to the ticket itself.

The screenshot shows a ticket details page titled 'Tickets Due Date - Due Date for Ticket #CMS-32 : RE: Outlook database exporter'. The page has a 'View' tab and a 'Custom Commands' section. The main content area displays the following fields:

- Title:** Due Date for Ticket #CMS-32 : RE: Outlook database exporter
- Location:** CMS-32
- Start Time:** 1/8/2012 1:18 AM
- End Time:** 1/8/2012 1:18 AM
- Description:** Helpdesk Ticket #CMS-32 assigned to on 1/10/2012 5:18:55 PM: Ticket URL: <http://bytestation/Lists/Issue%20Tracking/EditForm.aspx?ID=32>

Below the description, there is a section titled 'TICKET METADATA' containing the following information:

- Caller Name: Ben Nel
- Caller Email: [ben.nel@glacier.co.za](mailto:ben.nel@glacier.co.za)
- Caller Phone: 35435
- Problem Category: Hardware
- Problem Type: Dell XPS
- Problem Status: Pending
- Due Date: 1/11/2012 5:18:00 PM

Callouts highlight the following elements:

- Ticket ID:** #CMS-32
- Subject of the ticket:** RE: Outlook database exporter
- Due date of the ticket:** 1/11/2012 5:18:00 PM
- URL to the actual ticket #32:** <http://bytestation/Lists/Issue%20Tracking/EditForm.aspx?ID=32>
- Ticket Summary:** Helpdesk Ticket #CMS-32 assigned to on 1/10/2012 5:18:55 PM: Ticket URL: <http://bytestation/Lists/Issue%20Tracking/EditForm.aspx?ID=32>



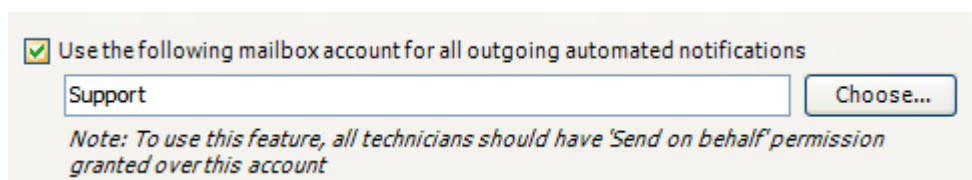
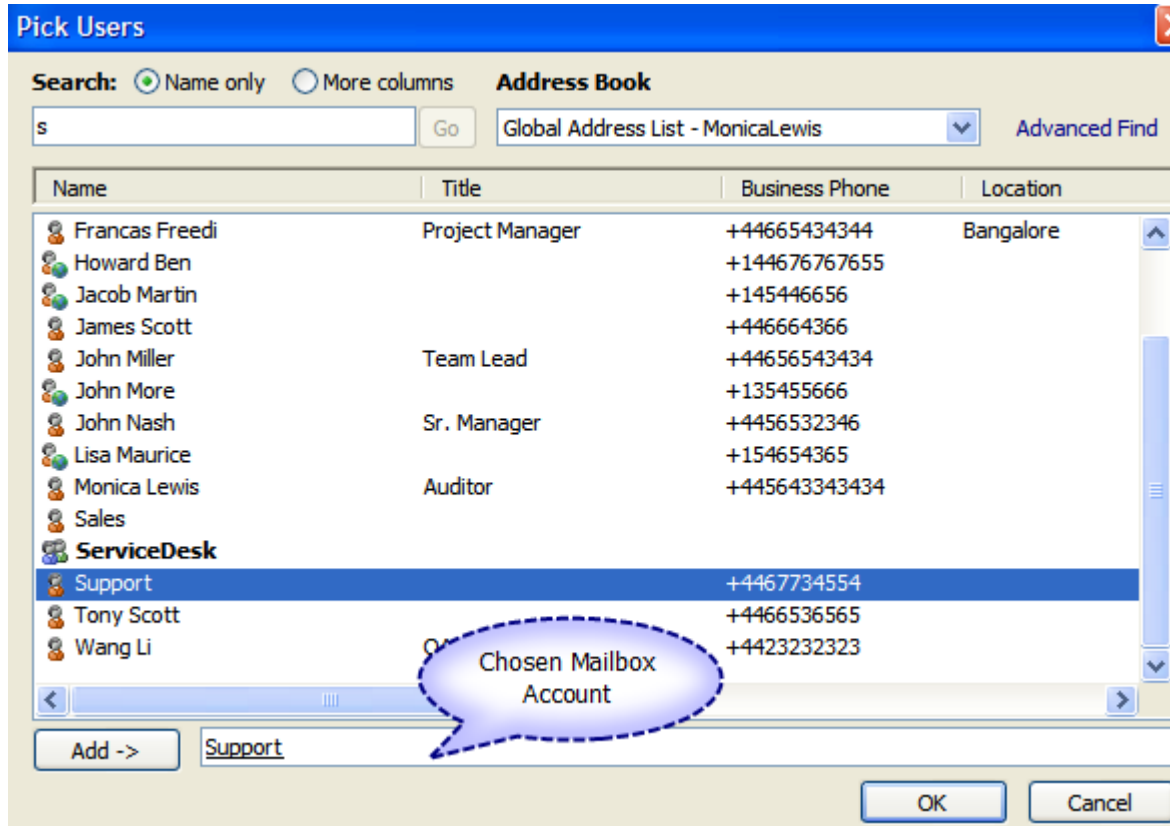
9

**6.5.19 - Use the following mailbox account for all outgoing automated notifications**

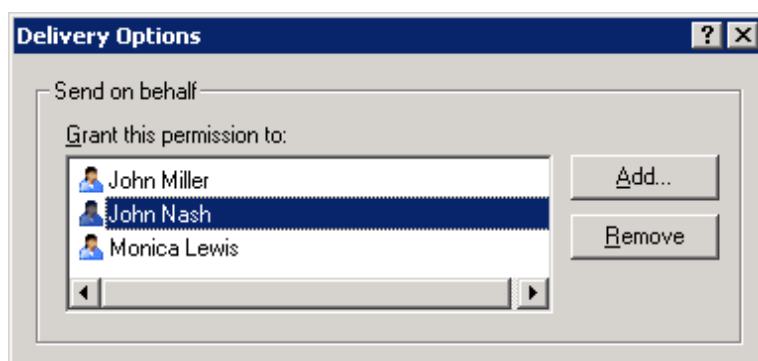
Specify a dedicated exchange mailbox (common) account from which automated notification emails and replies will be sent out e.g. *support@somecompany.com*. This mean, all your technicians, when replying to callers on their assigned support tickets, will use the common email account in the "From:" field of the outgoing emails.

10

This helps in having a central account that Issue Tracker can not only send out emails, but also monitor for replies from callers, thereby enhancing the overall response speed to support requests.



Note: 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**.



## 6.5c Attachment Settings

Tickets Automation **Attachments** Notifications

- ☒ Retain attachments in SharePoint Ticket Item **1**
- ☐ Remove attachments from processed Outlook mail item **2**
- ☒ Upload Outlook mail item as MSG file attachment within the SharePoint Ticket Item **3**
- ☒ Retain embedded images in SharePoint Ticket item **4**

### **1 6.5.20 - Retain attachments in SharePoint Ticket Item**

If enabled, Issue Tracker will also upload the associated attachments from Outlook mail item to the SharePoint ticket item. And the attachments will appear as hyperlinks at the bottom of the SharePoint list item.

|                     |   |
|---------------------|---|
|                     | Lisa  |
| Inread              | No  |
| Companies           |   |
| Categories          |   |
| Priority            | Normal  |
| Billing Information |   |
| Attachments         | <a href="#">CaseStudyHMO.pdf</a><br><a href="#">AddressEntryProperties.docx</a><br><a href="#">image003.jpg</a><br><a href="#">image001.jpg</a><br><a href="#">image002.jpg</a> |

**Attachments are uploaded automatically to SharePoint, and can be easily retrieved from these links**

### **2 6.5.21 - Remove attachments from processed Outlook mail item**

If enabled, Issue Tracker will delete the attachments from the particular Outlook mail item from which a trouble ticket was raised to a SharePoint list. This action is ignored, if the 'Retain attachments in SharePoint item' option was disabled.

### **3 6.5.22 - Upload Outlook mail item as MSG file attachment within the SharePoint Ticket Item**

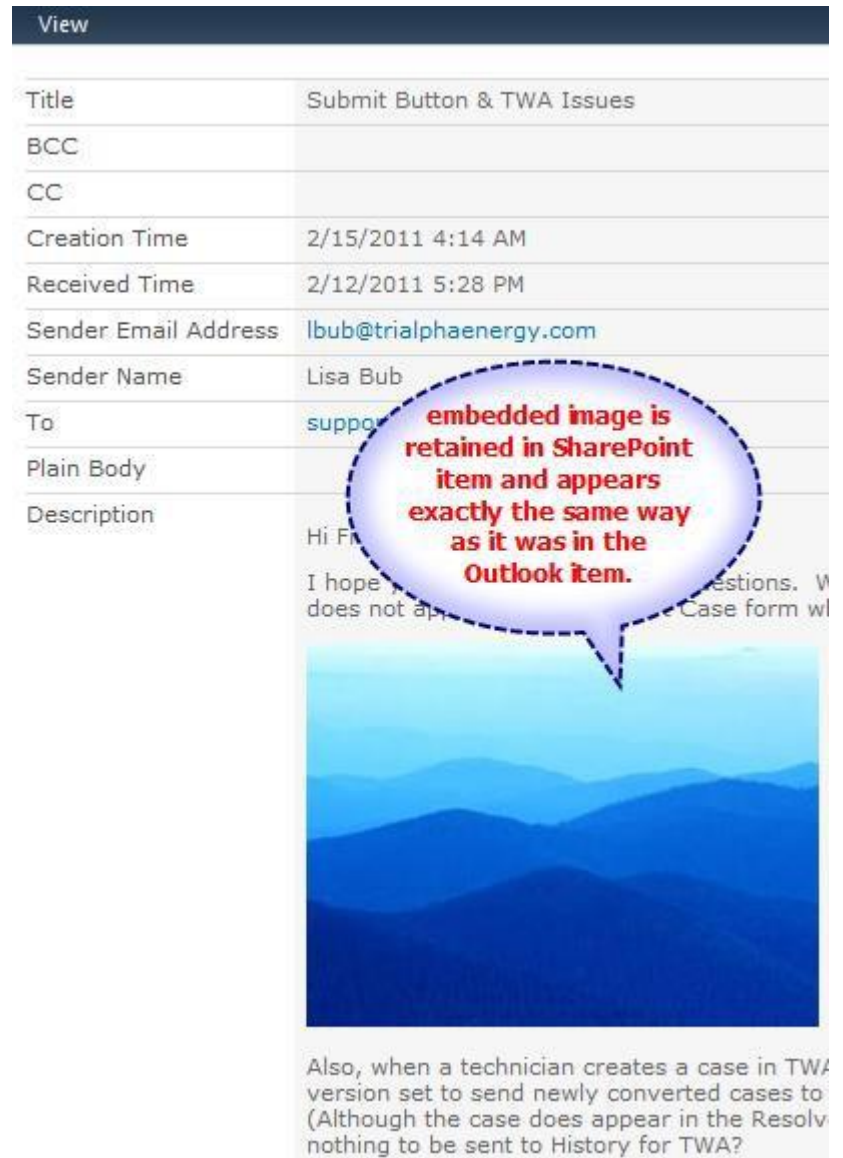
If this is enabled, Issue Tracker will generate a MSG file format of the Outlook mail item, and will be uploaded as attachments to the SharePoint ticket item.

|                     |  |
|---------------------|--|
| Companies           |  |
| Categories          |  |
| Priority            | Normal   |
| Billing Information |  |
| Attachments         | <a href="#">CaseStudyHMO.pdf</a><br><a href="#">image002.jpg</a><br><a href="#">AddressEntryProperties.docx</a><br><a href="#">OutlookItem.msg</a><br><a href="#">image001.jpg</a><br><a href="#">image003.jpg</a> |

4

**6.5.23 - Retain embedded images in SharePoint item**

If this is enabled, any embedded or inline images that may exist in the Outlook mail item, will also be retained in the SharePoint ticket item.

***In Outlook mail item:******In SharePoint ticket item:***

## 6.5d Notification Settings

1

### 6.5.24 - Send Confirmation notification to Caller when a new ticket is generated

This automated email is sent out as a confirmation notification to the sender or caller, when a technician raises a trouble ticket into a SharePoint list from an email.

2

### Do not send notification to caller if no technician is assigned to the Ticket

Enabling this option would force Issue Tracker to send out the notification email to the caller only if a technician was assigned.

3

### 6.5.25 - Send notification to Technician when a ticket is assigned

This automated email is sent out to the assigned technician informing about the ticket, and to start working on it. The email may contain the direct URL to the SharePoint ticket and enables the technician to access it directly, without needing to search for it in the SharePoint list.

4

### 6.5.26 - Send notification to technician when a new reply from the caller is received

This automated email is sent out to the assigned technician when the caller replies back to escalates the ticket.

5

### 6.5.27 - Send notification to Caller when ticket is marked resolved

This automated email is sent out to the caller when the allotted ticket is marked resolved by the technician or manager.

6

### 6.5.28 - Send notification to assigned technician when ticket is reopened

This automated email is sent out to the assigned technician when a resolved ticket was reopened again.

7

### 6.5.29 - Send notification to assigned technician on ticket due date lapsed

This automated email is sent out to the assigned technician when the due date of the ticket (the technician is responsible for) was not resolved within the due time.

8

### 6.5.30 - Notify the following managers on due date lapsed

The helpdesk administrator can also choose which particular users/managers will be automatically when the due date of a particular ticket was not resolved within the specified due time.

9

### 6.5.31 - Notify the following users when a new ticket is generated in SharePoint

The helpdesk administrator can choose which particular users/managers/stakeholders are to be notified automatically when a new ticket is raised into the SharePoint.



## 6.5e Statistics

Tickets Automation Attachments Notifications **Statistics**

Choose which rate is to be used for calculating total cost on time spent on a ticket — **1**

☐ Technician Rate  
☐ Problem Rate  
☐ Use this fixed Rate   
☒ Let technician enter the Rate for each Ticket  
*'Rate' Field mapping is required with all SharePoint Lists*

Calculate Rate Per — **2**

☒ Hour ☐ Day (24 hrs) ☐ Custom  Hrs

Take Time Spent entered on ticket as — **3**

☐ Minutes ☒ Hours ☐ Days

**1**

### 6.5.32 - Choose which rate to be used for calculating total cost on time spent on a ticket

When running OLAP Statistics or Summary Reports, you will find there is a 'Total Cost' measure. Total Cost on a ticket is computed by multiplying time spent with the rate (eg. **Total Cost = Time Spent x Rate**). So, this rate can be decided based on 4 different sources – *Technician Rate*, *Problem Rate*, administrator specific *fixed or universal rate*, and lastly, the rate that technician entered uniquely on each ticket (also known as *ticket rate*).

**2**

### 6.5.33 - Calculate Rate Per Hour/Day/Custom

Whatever rate source you have specified above, in this option, you can choose if the rate is to be taken hourly, or with greater domination of hours. For example, the first choice is hourly rate, second is day rate (e.g., 24 hours per rate), and in the last choice, you can enter your own number of hours to be taken for the rate.

What it means is, when calculating total cost on resolving a ticket, the time spent component will be adjusted per the rate hours slab before computing the cost.

*For example, let us assume the time spent on a ticket is 48 hours.*

*So for hourly rate (first choice), **total cost = 48 x Rate**.*

*For Day rate, **total cost = 2 (Days) x Rate**.*

*For custom rate, if the hours is 6 hours for the rate, **total cost = 8 x Rate***

**3**

### 6.5.34 - Take Time spent entered on ticket as Minutes/Hours/Days

You can also specify in which time measurement (*Minute, Hours or Days*) would be the time spent value taken to, when calculating Total Cost of resolving the ticket.

*For example, let us assume the time spent value on a ticket is 48, and rate is hourly.*

*So if 'Minutes' measurement is taken, time spent is 48 mins. So for calculating total cost, this value (in mins) will be converted to hours (48/60=0.8 hrs). So **total cost = 0.8 x Rate**.*

*If 'Hours' measurement is set, time spent will be 48 hrs.*

*In this case, the total cost is pretty straightforward **total cost = 48 x Rate***

*If the 'Days' measurement is selected, time spent value will be 48 days. So this value will be converted to hours. So effectively, **total cost = (48x24) x Rate***





## 7. Searching Tickets in Outlook

This ticket search utility within Issue Tracker is comprehensive with lot of filter options and offers a consolidated view of tickets from all the SharePoint lists. No longer are you required to navigate to each SharePoint list in your web browser to search for a particular ticket, thus saving time and not to mention instant access to ticket information at the hour of need.

The screenshot shows the 'Search Tickets in SharePoint' window. It has a 'SharePoint Ticket List' dropdown set to 'All'. A red arrow points to this dropdown with the text 'Select a SharePoint Ticket list on which search is to be performed'. The 'Search by' dropdown is set to 'Keywords', with a red arrow pointing to it and the text 'Select a search filter'. Below these is a text box labeled 'Enter Keywords' containing the word 'robert', with a red arrow pointing to it and the text 'specify a filter value'. To the right are 'Search' and 'Reset' buttons. Below the search area, it says 'Search Result : 2 tickets found (Ongoing = 1, Resolved = 1)'. A toolbar contains icons for 'Reply', 'Reply with a KB', 'Edit Ticket #33', 'Mark Ticket #33 As Resolved', 'Delete', and 'Open in Browser'. Below the toolbar is a table of search results:

| Subject                       | ID     | Assigned To  | Due Date          | Caller                | Email                 |
|-------------------------------|--------|--------------|-------------------|-----------------------|-----------------------|
| iPad blurring fonts           | CMS-22 | monica lewis | 1/7/2012 8:30 PM  | robert.barsan@oran... | robert.barsan@oran... |
| Strange behavior with my M... | CMS-33 | monica lewis | 1/11/2012 5:22 PM | robert.barsan@oran... | robert.barsan@oran... |

A red arrow points to the second row of the table with the text 'Search result - tickets that meet the search criteria will be listed here'.

The first step in performing a search is to decide from which SharePoint list, will be search executed on. If you are not sure, you can just select the 'All' option to search all administrator configured SharePoint ticket lists.

This screenshot shows the 'SharePoint Ticket List' dropdown menu. The 'All' option is selected and highlighted in blue. Other visible options include 'Issue Tracking (http://bytestation)' and 'Tasks (http://bytestation)'.

The next step is to choose the filter to use as criteria for the search. You will see that there are 10 filter options available.

This screenshot shows the 'Search by' dropdown menu. The 'Keywords' filter is selected and highlighted in blue. Other visible filters include 'Resolved Between', 'Ticket Category/Type', 'Technician', 'Ticket Status', 'Time Spent', 'Custom Fields', 'Due On', and 'Due Between'. A red arrow points to the 'Resolved Between' filter with the text 'Available filters'.

**Search by Keywords** - The first and the most common search is the free text keyword search. If a caller is on the phone, you can retrieve all the tickets allotted to the caller by searching using the caller name, email, phone number, company name. If the caller gives you a particular ticket number, you can key in the number to just retrieve that particular ticket and opens it in the ticket form for detail view.

This screenshot shows the search interface. The 'SharePoint Ticket List' dropdown is set to 'All'. The 'Search by' dropdown is set to 'Keywords'. The 'Enter Keywords' text box contains the word 'robert'. A red arrow points from the 'Keywords' dropdown to the text box.



**Search by Category and Type** – Here you can search and list the tickets by ‘Problem Category’ and further by ‘Problem Type’.

SharePoint Ticket List

All

Search by: Ticket Category/Type

Filter by Problem

Category: Hardware

Type: Sony VAIO

**Search by Technician** –List the tickets by the assigned technician.

SharePoint Ticket List

All

Search by: Technician

Filter by Technician

Name: monica lewis

**Search by Ticket Status** –List the tickets by the status.

SharePoint Ticket List

All

Search by: Ticket Status

Filter by Status

Status: Processing

**Search by Time Spent** –You can search tickets from all SharePoint lists by specifying a specific time spent value, and you can use one of the relevant logical operators.

SharePoint Ticket List

All

Search by: Time Spent

Time Spent

Greater Than

60

**Search by Custom Fields** –If your manager had defined custom lists, you can search tickets by choosing the specific custom list name from the drop down, and a corresponding value.

SharePoint Ticket List

All

Search by: Custom Fields

Filter by Custom Fields

Field: States

Value: MA

**Search by Due date** – Here you can perform a search of the tickets by specifying a particular due date from the date picker. Alternatively, you can also search by specifying a date range (from and to).

SharePoint Ticket List

All

Search by: Due On

On

Friday , January 13, 2012

SharePoint Ticket List

All

Search by: Due Between

Between

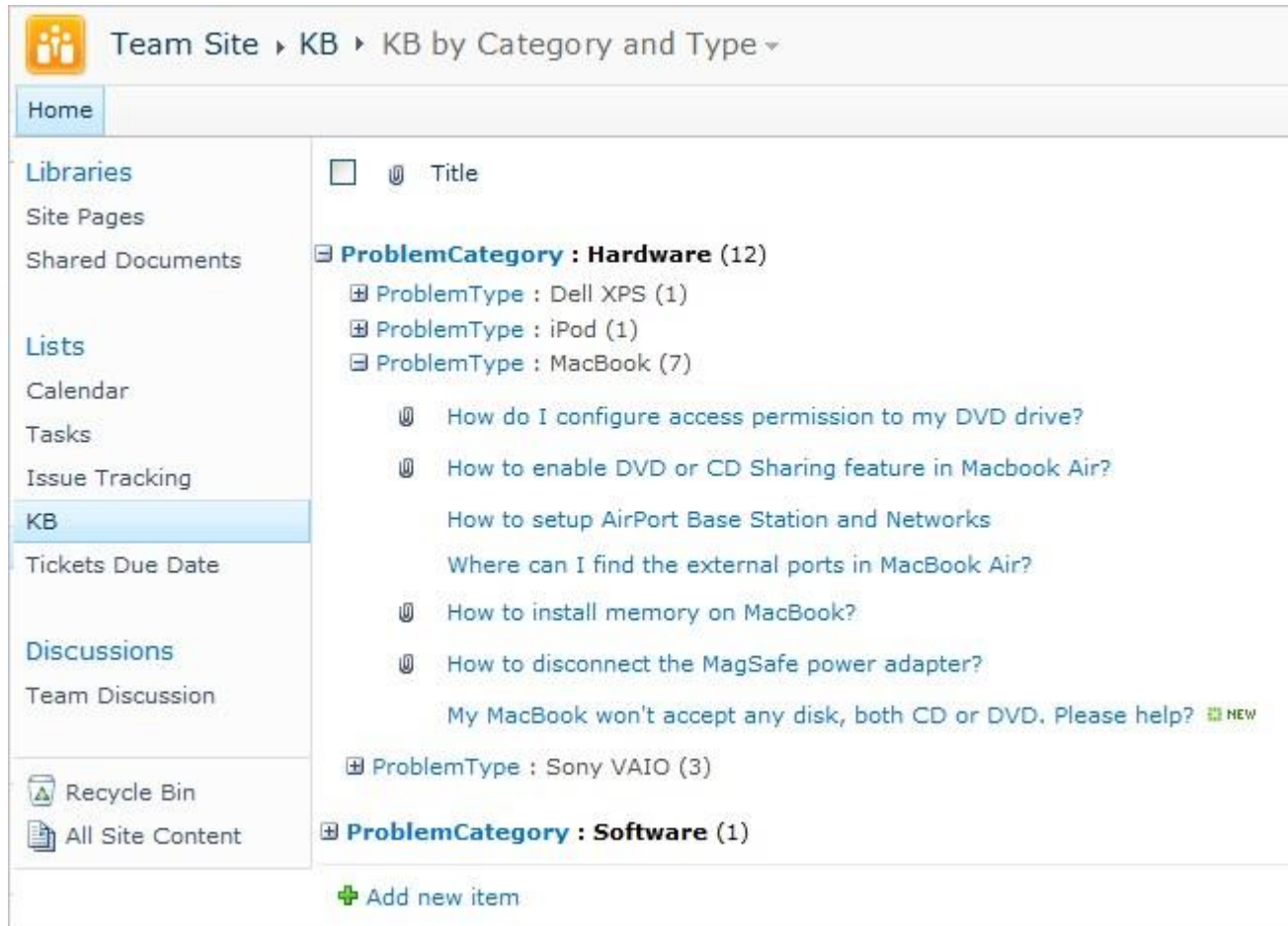
From: Friday , January 06, 2012

To: Friday , January 13, 2012



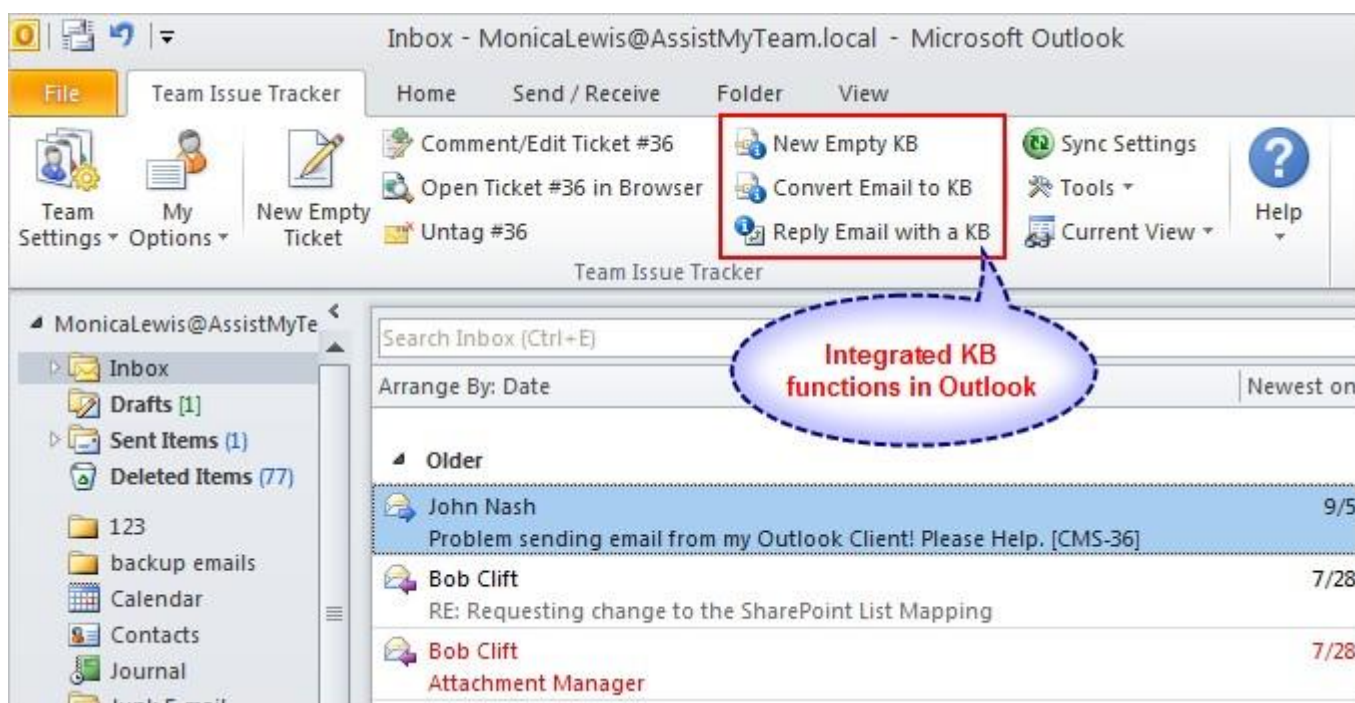
## 8. Knowledge Base Articles

The inbuilt knowledge base in Issue Tracker acts as an effective knowledge sharing medium by allowing help desk team to document best practices and solutions to common problems, in the form of KB articles stored on a dedicated SharePoint list. These KB articles can then be used when replying to time-consuming and repeated queries from end-users, boosting support productivity by leveraging collective knowledge and providing.



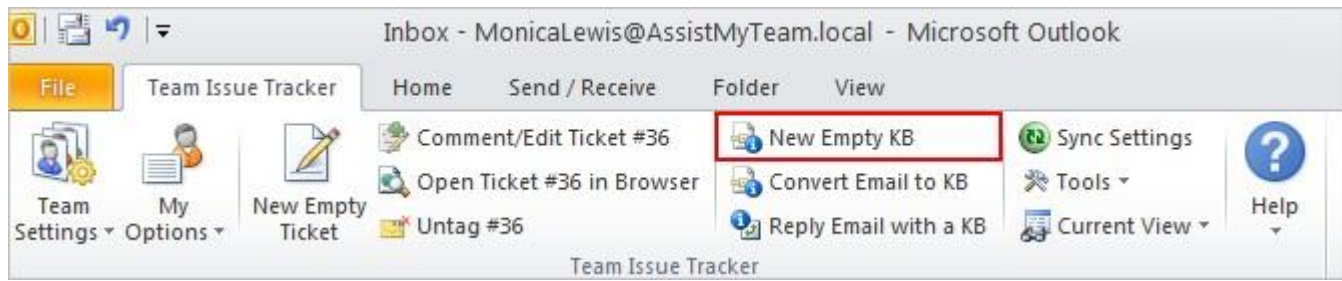
You can customize the views in this SharePoint list, to sort and group the KB articles in a more usable and presentable form. For instant, above, the KB articles are arranged in hierarchical tree, by grouping KB articles into **Problem Category** and then by **Problem Type**. Such arrangement makes it very easy to browse and find the relevant KB article at the time of need.

Even though KB articles are stored on your SharePoint list, every technician can make use of it in Microsoft Outlook to reply to emails in a snap.

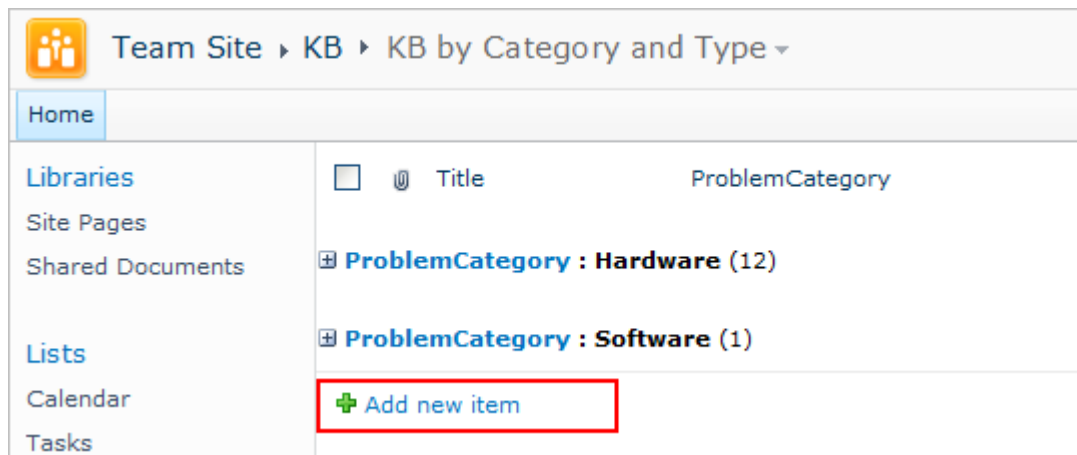


## 8.1 Creating a new Knowledge Base article

You can compose a new KB article in two different ways. The first one is by pressing the 'New Empty KB' option from the Issue Tracker toolbar or ribbon in Outlook.



The other way is from the KB SharePoint list and clicking the 'Add new item'.



You can then compose the KB by filling the Title, Category, Type and the Description fields.

 A screenshot of the 'Compose a new KB' form in SharePoint. The form is titled 'Team Site > KB: New Item'. A speech bubble points to the title 'Compose a new KB'. The form has several fields:
 

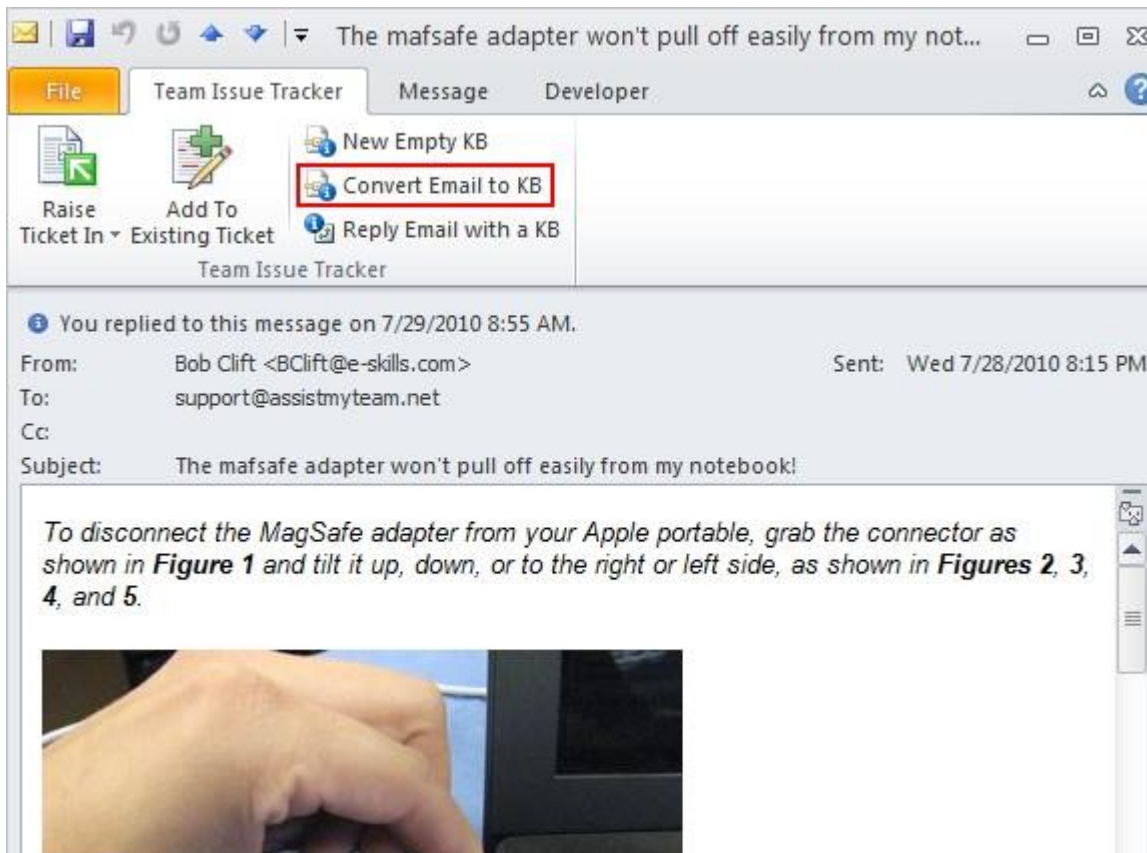
- Title \***: A text box containing 'My MacBook won't accept any disk, both CD or DVD. Please help?'.
- ProblemCategory**: A dropdown menu with 'Hardware' selected.
- ProblemType**: A dropdown menu with 'MacBook' selected.
- Description**: A text area containing the text: 'If you are experiencing issues with using your MacBook Air SuperDrive being accepted, try the following steps to resolve the issue: 1. Make sure the SuperDrive is laying flat on a surface with the sil...'. Below the text is an image of a MacBook Air.

 The left sidebar shows navigation options like 'Home', 'Libraries', 'Site Pages', 'Shared Documents', 'Lists', 'Calendar', 'Tasks', 'Issue Tracking', 'KB', 'Tickets Due Date', 'Discussions', and 'Team Discussion'.

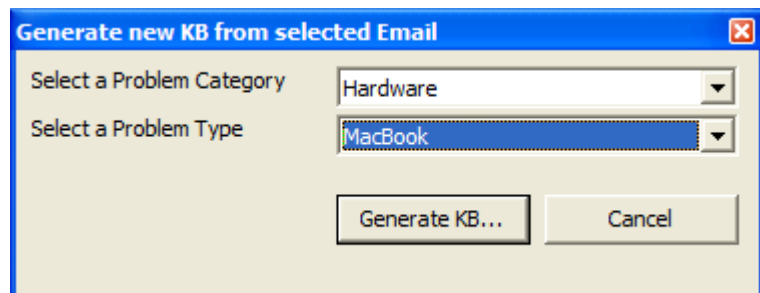



## 8.2 Generating a new Knowledge Base article from an email

If you have resolved a problem of an end-user and the information leading to the solution is in an email, you can generate a new KB article directly by inheriting the information from the email. Open the email, and from the Issue Tracker toolbar or ribbon, press 'Convert Email to KB' option.



It would then allow you to specify a Problem Category and Type under which this new KB article will belong to in the SharePoint list.



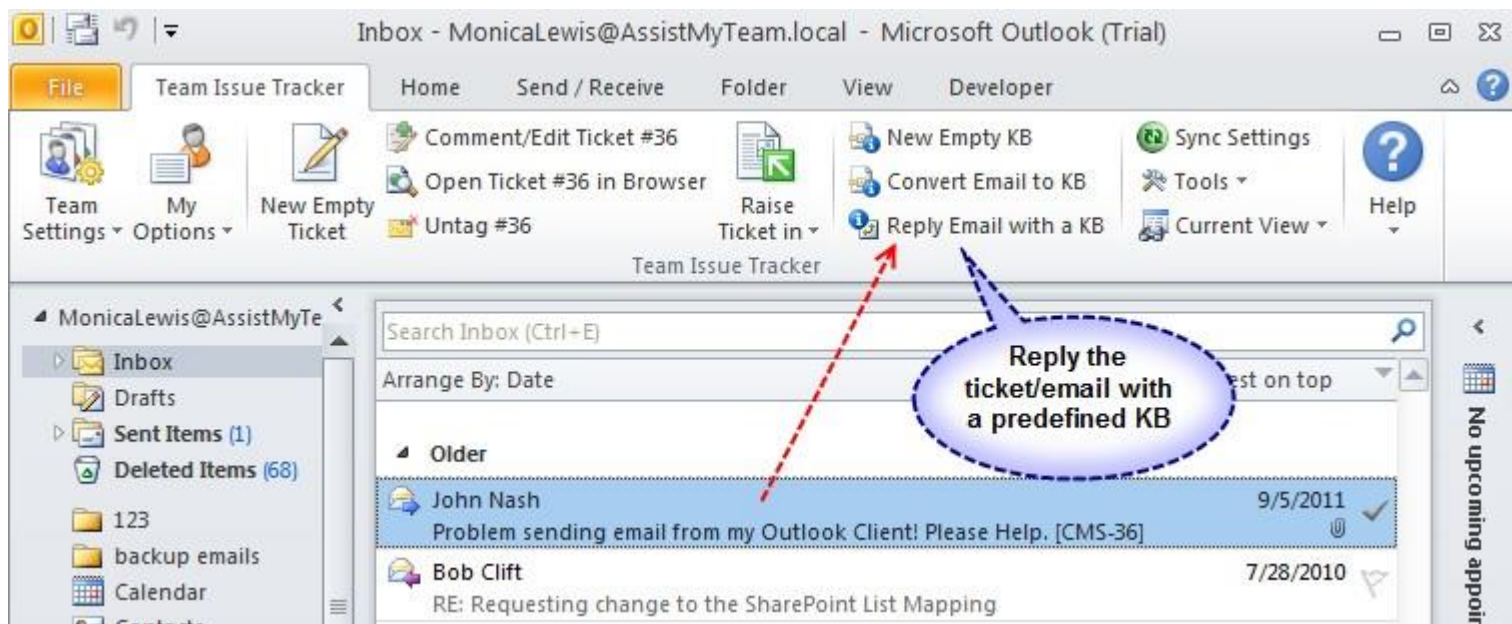
And this is how the generated KB article appears in your SharePoint. Notice that, the inline images, formatting and attachments are carried forward.



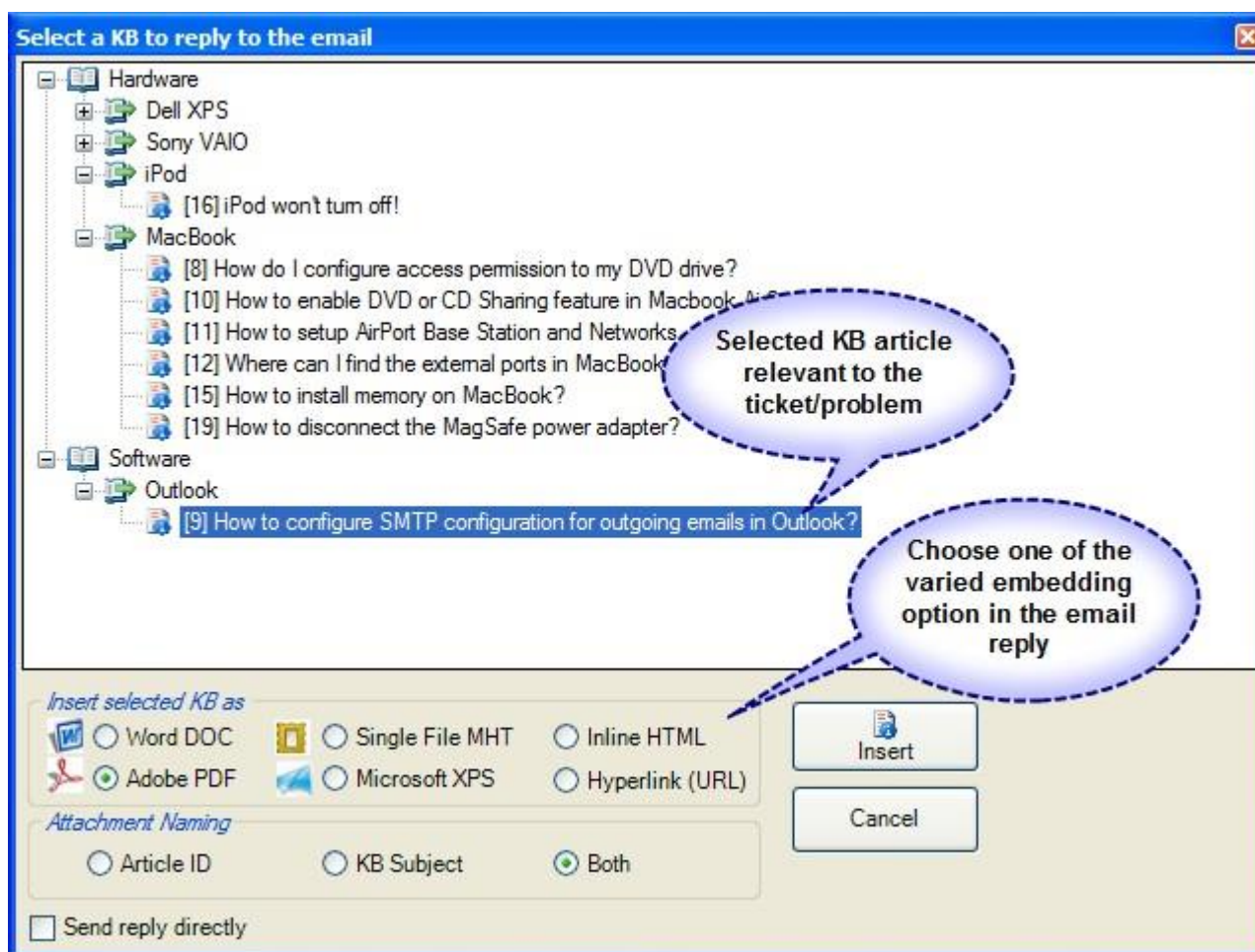


### 8.3 Using a KB article to reply to a trouble ticket/email in Outlook

From the integrated knowledge base, you can choose one of this KB for replying to tickets or emails. Select or open an email and click the 'Reply Email with a KB' option in the Issue Tracker toolbar or ribbon in Outlook.

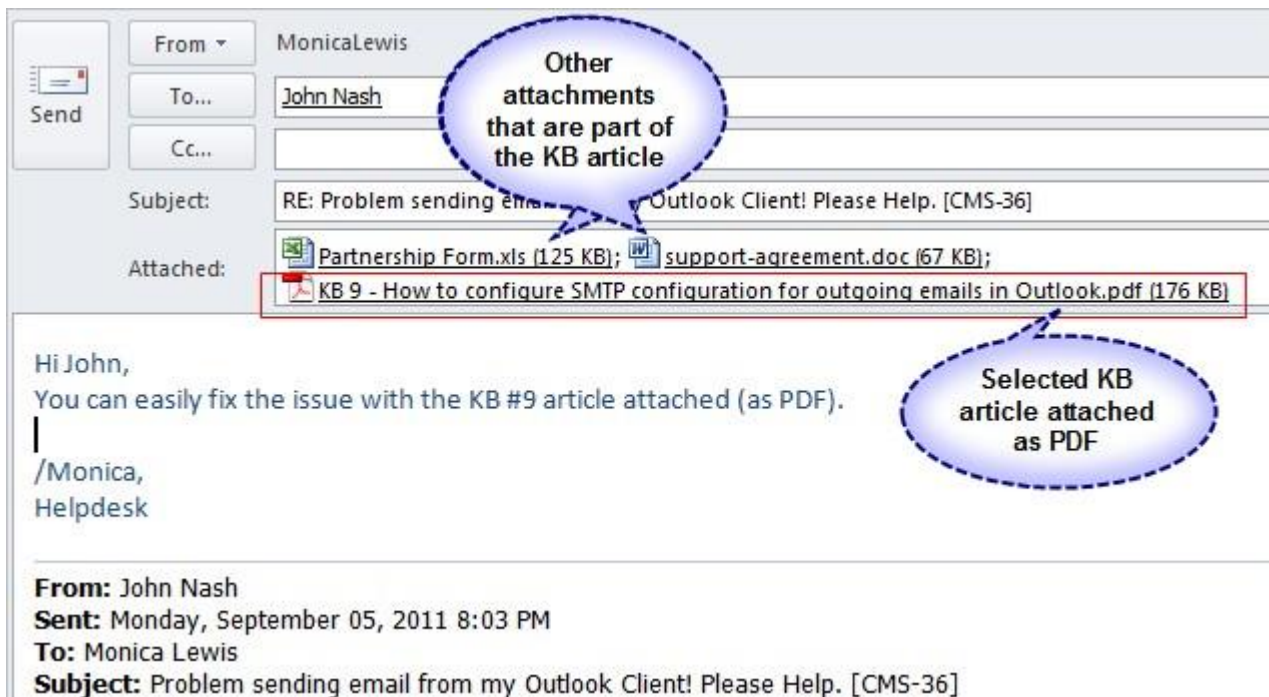


A dialog window allows the technicians to browse through the existing knowledge base articles, and select the relevant article to be embedded either as attachment, inline or as URL into the email reply.

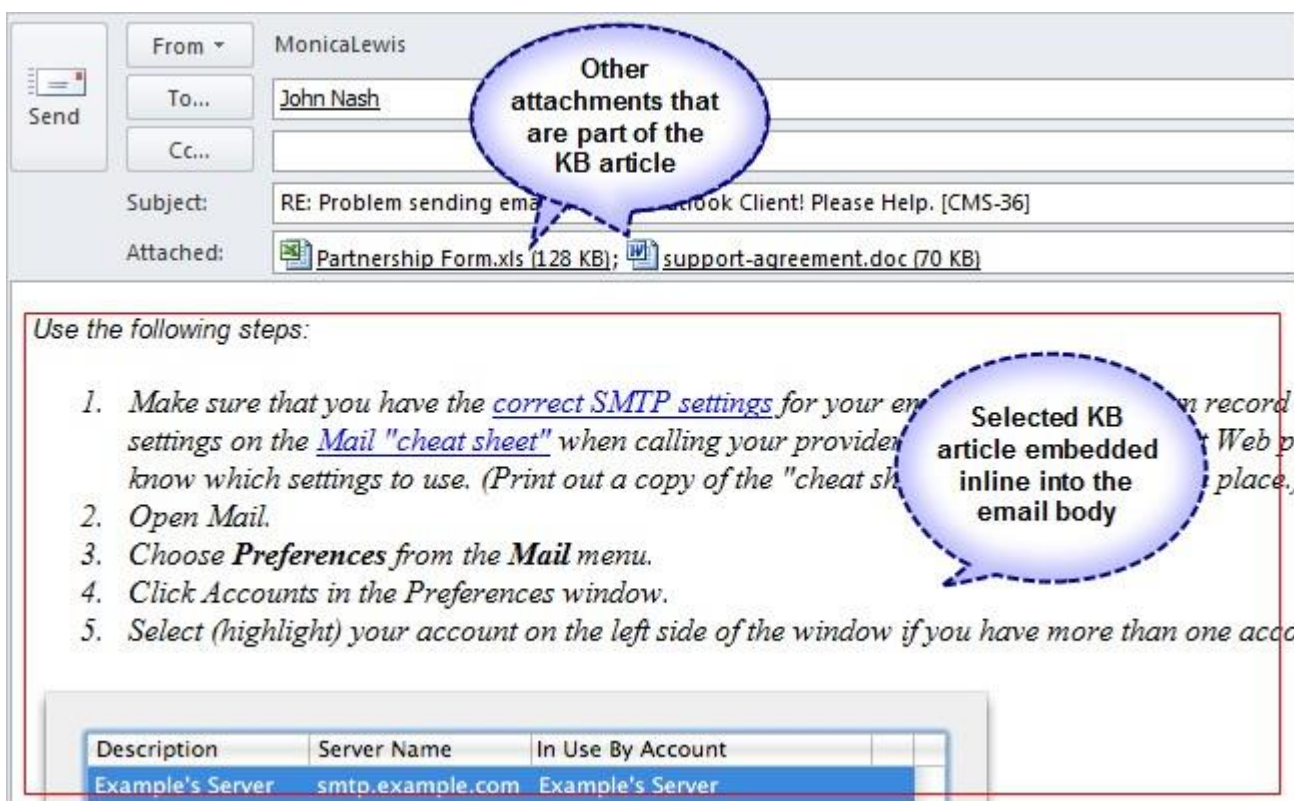


Selected KB article can be applied or inserted into the replied email in varied format. You can choose to insert as attachment in the form of a word document (\*.doc), Adobe PDF (\*.pdf), Microsoft XPS (\*.xps) or as single file MHTML (\*.mht).





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



Alternatively, if your SharePoint site is opened (i.e., accessible via the web), then you can also insert the hyperlink or URL of the selected KB article into the reply, so that the recipient can simply click the hyperlink to open the relevant article in their web browser.





## 9. Summary Reports

With summary reports, managers can generate summarized reports on support tickets based on different time interval. It appraises on the current happenings on the helpdesk and enables tracking the progress of tickets. It provides an overview about when tickets are logged, due, worked and resolved over a period of time.

| ID | Technician   | Caller Name | Caller Email   | Caller Company | Due Date           |
|----|--------------|-------------|--|----------------|--------------------|
| 25 | monica lewis | Roger Janus | <a href="mailto:roger.janus@apple.com">roger.janus@apple.com</a> | Apple          | 1/13/2012 12:05 AM |
| 26 | monica lewis | Kelon Song  | <a href="mailto:kelon@gover.com">kelon@gover.com</a>             | AMT            | 1/11/2012 2:01 PM  |
| 27 | John Nash    | Bob Clift   | <a href="mailto:BCliff@e-skills.com">BCliff@e-skills.com</a>     | IBM            | 1/10/2012 2:07 AM  |

1

Select a **time period** from the drop down for which a summary report is to be generated. The following periods are available for selection:

- Today
- Yesterday
- This Week
- Last Week
- This Month
- Last Month
- This Year
- Last Year
- Date Range..

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

**Note:** When using current intervals such as this week, this month, this year etc., it would not take into account the remaining days required for completing that interval (say, week, month) from the current day.

2

**Select a SharePoint Ticket List** - Here you can specify the particular SharePoint list from which summary report is to be generated. You can also use the 'All' option, to generate reports from all SharePoint lists.

3

**Specify a Report Type** - Select what type of report is to be generated. The following sections are available for inclusion into the report:

|                               |  |
|-------------------------------|--|
| <b>Tickets Raised</b>         | List tickets (both ongoing and resolved) logged into the specified time period |
| <b>Tickets Resolved</b>       | List tickets resolved in the specified time period                             |
| <b>Tickets Ongoing</b>        | List ongoing tickets within the specified time period                          |
| <b>Tickets Worked/Updated</b> | List tickets last worked (modified) within the specified time period           |
| <b>Tickets Due</b>            | List tickets due within the specified time period                              |

4

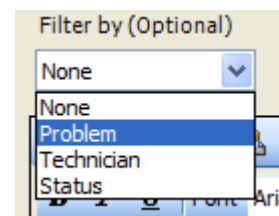
Select which all fields of the ticket are to be included into the report.  
The following fields are available:

|                       |                         |                                   |
|-----------------------|-------------------------|-----------------------------------|
| <b>ID</b>             | <b>Modified</b>         | <b>Time Spent</b>                 |
| <b>Technician</b>     | <b>Problem Category</b> | <b>Total Cost</b>                 |
| <b>Caller Name</b>    | <b>Problem Type</b>     | <b>Open Duration (Mins)</b>       |
| <b>Caller Email</b>   | <b>Problem Status</b>   | <b>Open Duration (Hrs)</b>        |
| <b>Caller Phone</b>   | <b>Rate</b>             | <b>Resolution Duration (Mins)</b> |
| <b>Caller Company</b> | <b>Resolved</b>         | <b>Resolution Duration (Hrs)</b>  |
| <b>Due Date</b>       | <b>Resolved Date</b>    | <b>Elapsed Duration (Mins)</b>    |
| <b>Created</b>        | <b>Subject</b>          | <b>Elapsed Duration (Hrs)</b>     |

5

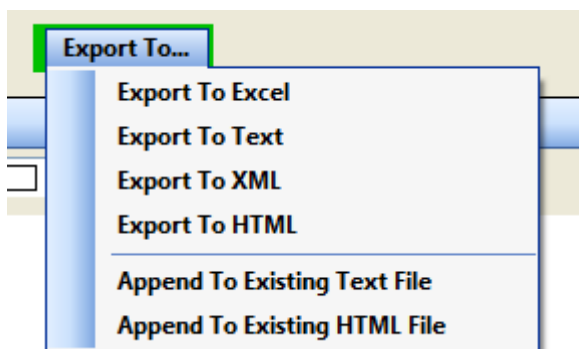
There is further provision for refining the report through these filters: **By Problem, By Technician or by Ticket Status**

This is handy to generate specific report on assigned technician, or on the ticket problem category.



6

**Save the current report to file** – You can save the report to an Excel Spreadsheet (\*.XLS), Text file (\*.TXT), XML data file (\*.XML) or to a web page file (\*.HTM) for sharing and future use.



Screenshot: Exported to an Excel Spreadsheet

|    | A  | B            | C            | D                   | E              | F                 | G              | H          | I                |
|----|----|--------------|--------------|---------------------|----------------|-------------------|----------------|------------|------------------|
| 1  | ID | Technician   | Caller Name  | Caller Email        | Caller Company | Due Date          | Created        | Modified   | Problem Category |
| 2  | 25 | monica lewis | Roger Janus  | roger.janus@Apple   |                | 1/13/2012 12:05   | 1/10/2012 2:20 | 2012-01-13 | Hardware         |
| 3  | 26 | monica lewis | Kelon Song   | kelon@grove         | AMT            | 1/11/2012 14:01   | 1/10/2012 2:20 | 2012-01-13 | Hardware         |
| 4  | 27 | John Nash    | Bob Clift    | BClift@e-skill      | IBM            | 1/10/2012 14:07   | 1/10/2012 2:20 | 2012-01-12 | Hardware         |
| 5  | 28 | john         | Bob Clift    | BClift@e-skill      | AMT            | 1/11/2012 2:09 PM | 1/10/2012 2:20 | 2012-01-12 | Software         |
| 6  | 29 | monica lewis | Bob Clift    | BClift@e-skills.com |                | 1/13/2012 12:06   | 1/10/2012 2:20 | 2012-01-13 | Hardware         |
| 7  | 30 | John Nash    | Eliff Clif   | MonicaLewis         | AMT            | 1/11/2012 4:42 PM | 1/10/2012 4:20 | 2012-01-12 | Software         |
| 8  | 31 | john         | Ben Nel      | ben.nel@glawer      |                | 1/11/2012 5:15 PM | 1/10/2012 5:20 | 2012-01-12 | Service          |
| 9  | 32 | Francas Free | Sien Fag     | ben.nel@glawer      | tdfgdggf       | 1/11/2012 5:18 PM | 1/10/2012 5:20 | 2012-01-12 | Hardware         |
| 10 | 33 | monica lewis | robert.barsa | robert.barsa        | rdfdf          | 1/11/2012 5:22 PM | 1/10/2012 5:20 | 2012-01-13 | Hardware         |

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.

8

**The report document area.** At the top of the document, the technician name is automatically inserted as well as the time the report was generated.



## 10. OLAP Statistics and Reporting

With the integrated Online Line Analytical Processing (OLAP) tool, helpdesk managers can analyze tickets data from the SharePoint lists in multidimensional view to extract critical information and intelligence that will enable them to take better decisions in business. The tool will allow you 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.

### Advantage of 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. It comes with various inbuilt reports specific to Issue Tracker tickets.

**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 want to share the report through the net or by email you can easily export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

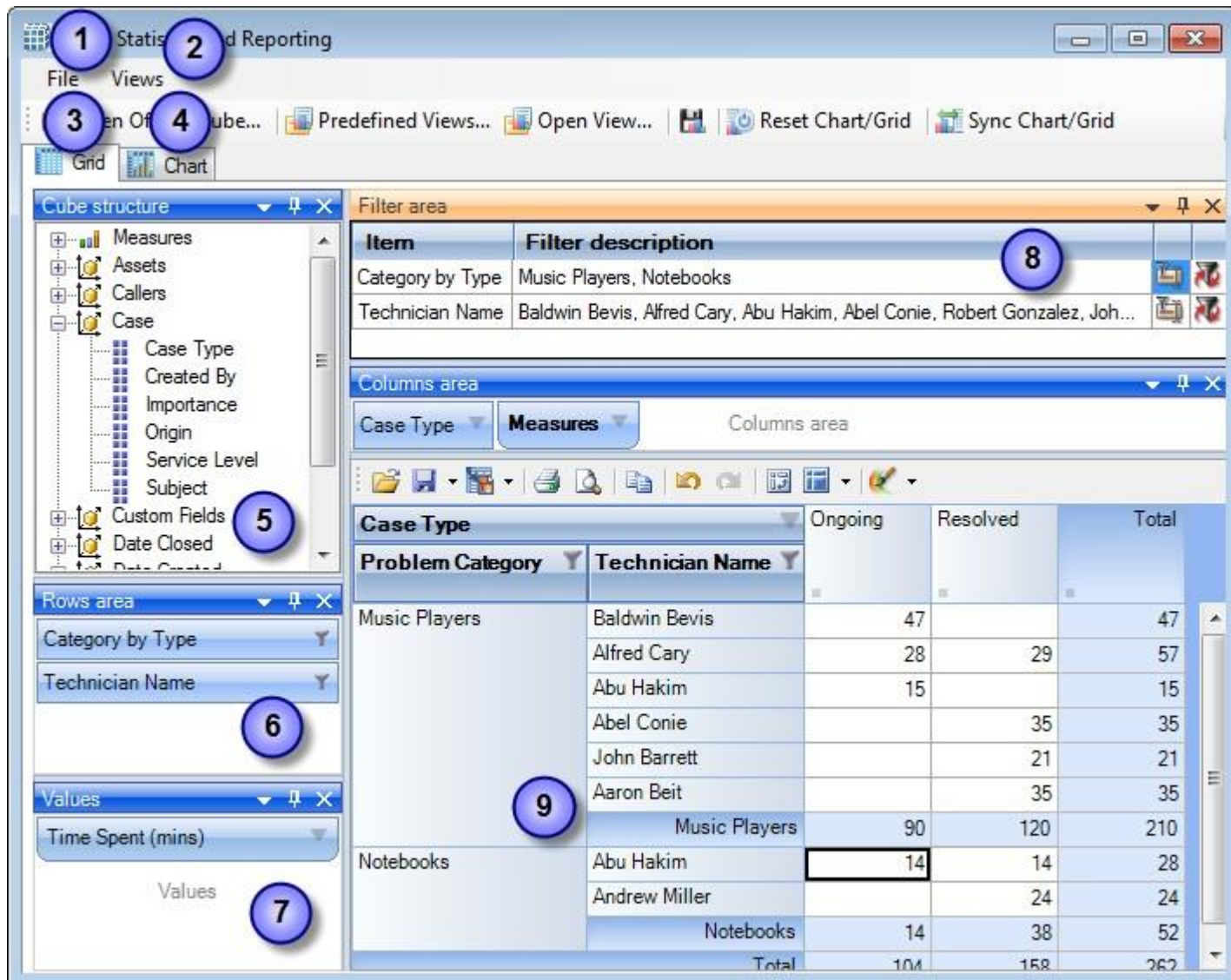
**Copy to Clipboard** - Select any data range in Chart/Grid and copy to clipboard. Then you'll be able to paste it in an Office program for further analysis. You can also paste the chart like a picture to illustrate your investigations. This greatly simplifies the task of creating detailed, data-rich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

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





## 10.1 The User Interface



This 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. This will highlight all the possible locations where it can be dropped. You can detach a panel from the component; it will be displayed as a float window.

Instrumental panels can be:

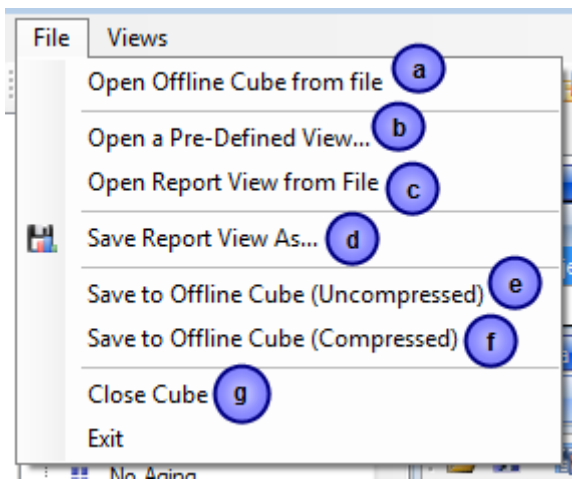
- Attached to any side of the component;
- Placed into any existing panel;
- Displayed as bookmarks on any panel;
- Set as auto-hidden panels;

Used as float windows.

1

### The File menu

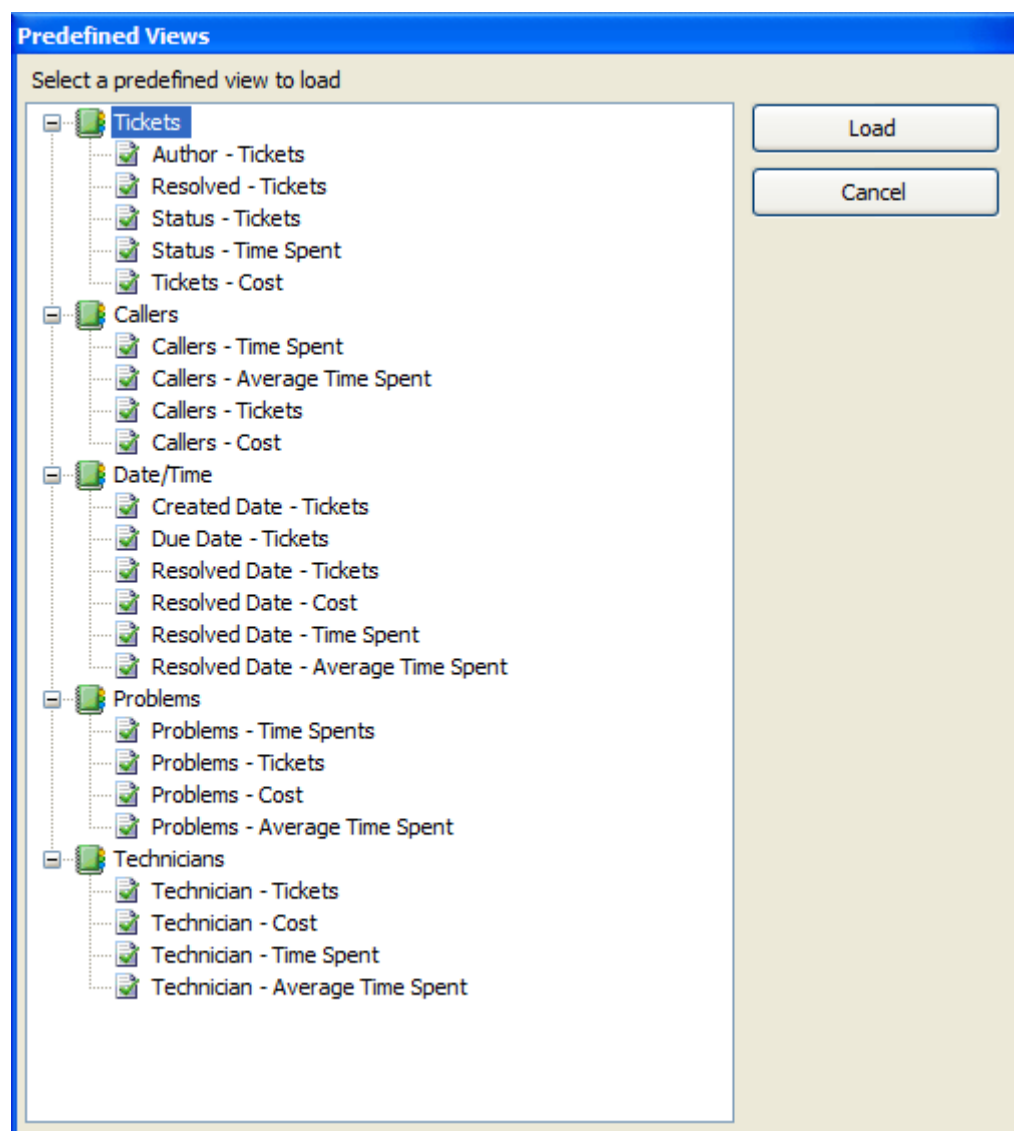
The file menu consists of the following commands:



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

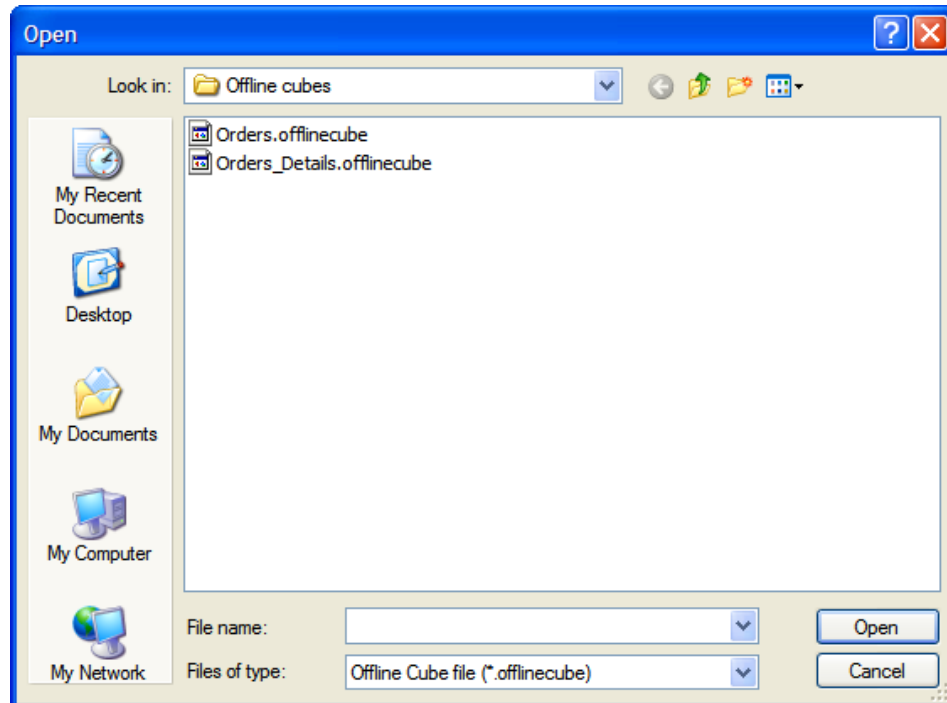
In such scenario, you have the option of connecting to an offline cube, which was previously generated and saved to your local folder using this utility. An offline cube file has the extension – *‘.offlinecube’* and can be either in compressed or uncompressed format. An offline cube gives the same functionality as that of a live cube (which is generated from the database 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** - More than 20 views specifically designed for Issue Tracker tickets are included. Simply select a view and click ‘Load’ or double-click to load the statistical analysis of that report, the result will be displayed in the Grid or Chart (depending on the current active view).

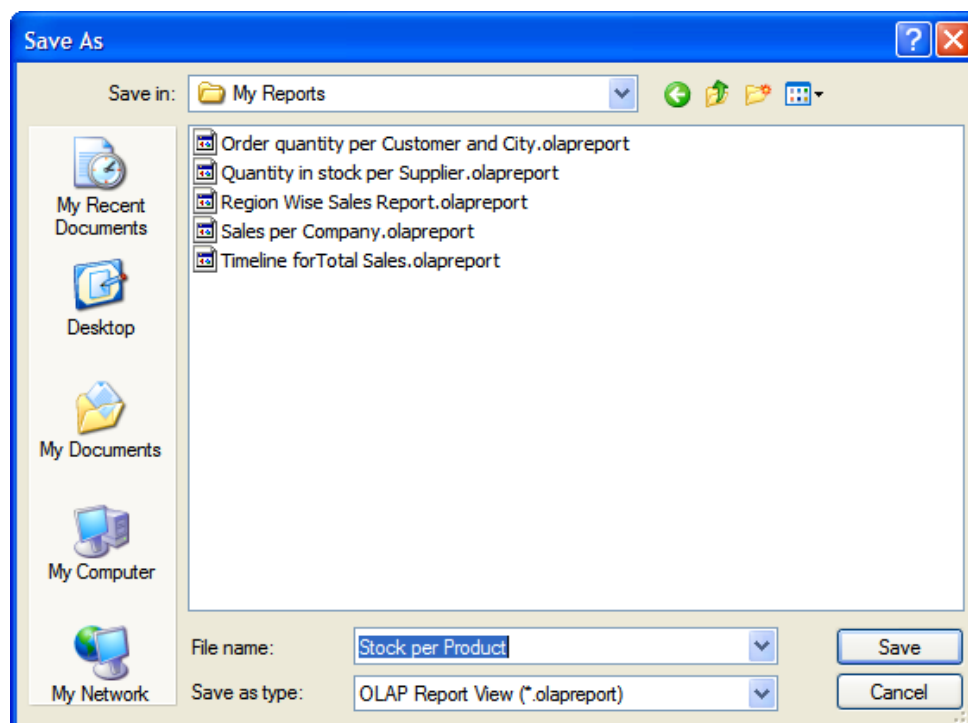


- c) **Open report view from file** - Once a particular snapshot of the statistics is achieved, you may want to save it for future reference or share it among your team members. A report view is the current state of the statistics in the Grid/Chart working area, with specific member fields on the pivot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

Column areas) and measure fields in the values area. It has a file extension '.olapreport'.



- d) **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.



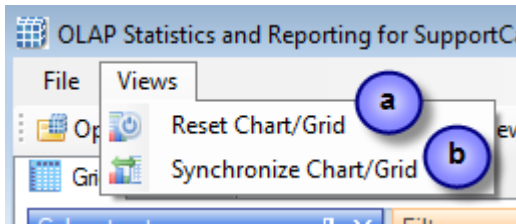
- e) **Save to offline Cube** – Once you have loaded a live cube from the timesheets database, you have the option to save the entire cube data to a file (with the extension .offlinecube) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed format, the former option will enable you to reduce the file size considerably.
- f) Same as e. (above)
- g) **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 Grid and chart. It is particularly useful, for example, when you have build up a grid with aggregated data, but with a more visual representation of the statistics in the 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 press '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 views 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

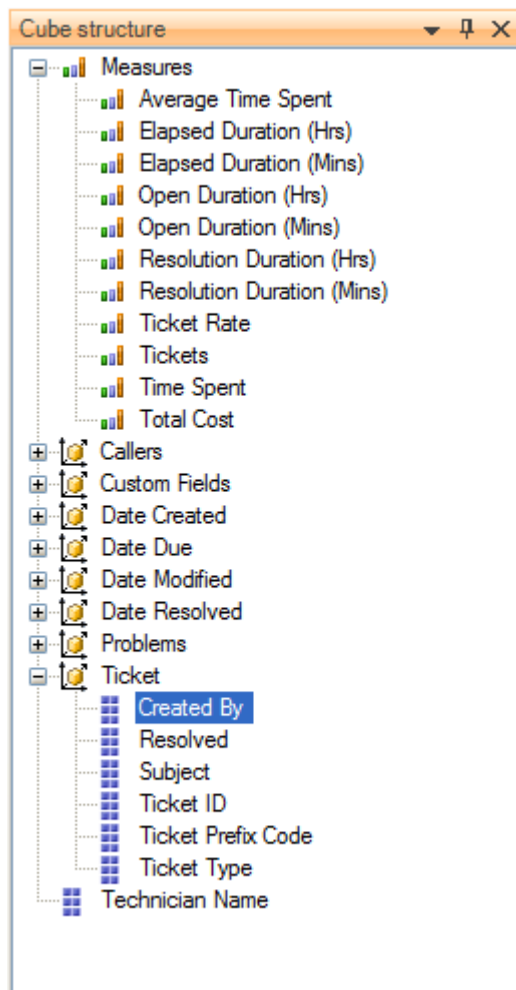
### OLAP Chart panel

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. Rests 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.

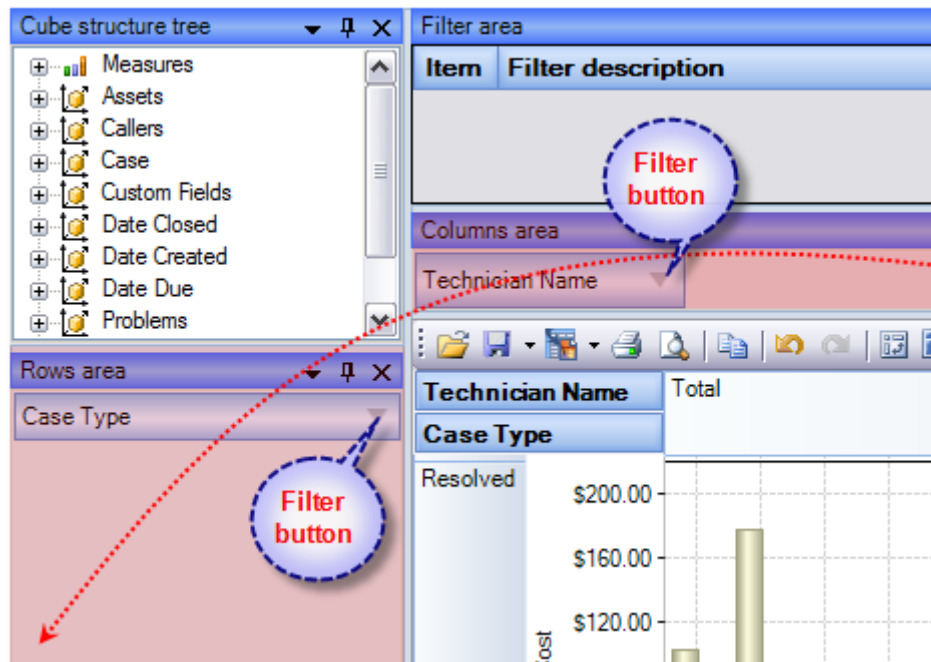
Both hierarchies and measures have their own menus. Right click will call the context menu that gives you an option to place the element where you like. You can also filter the selected element (see Filtering hierarchies and measures) or place it to the selected panel.



6

**Pivoting panels**

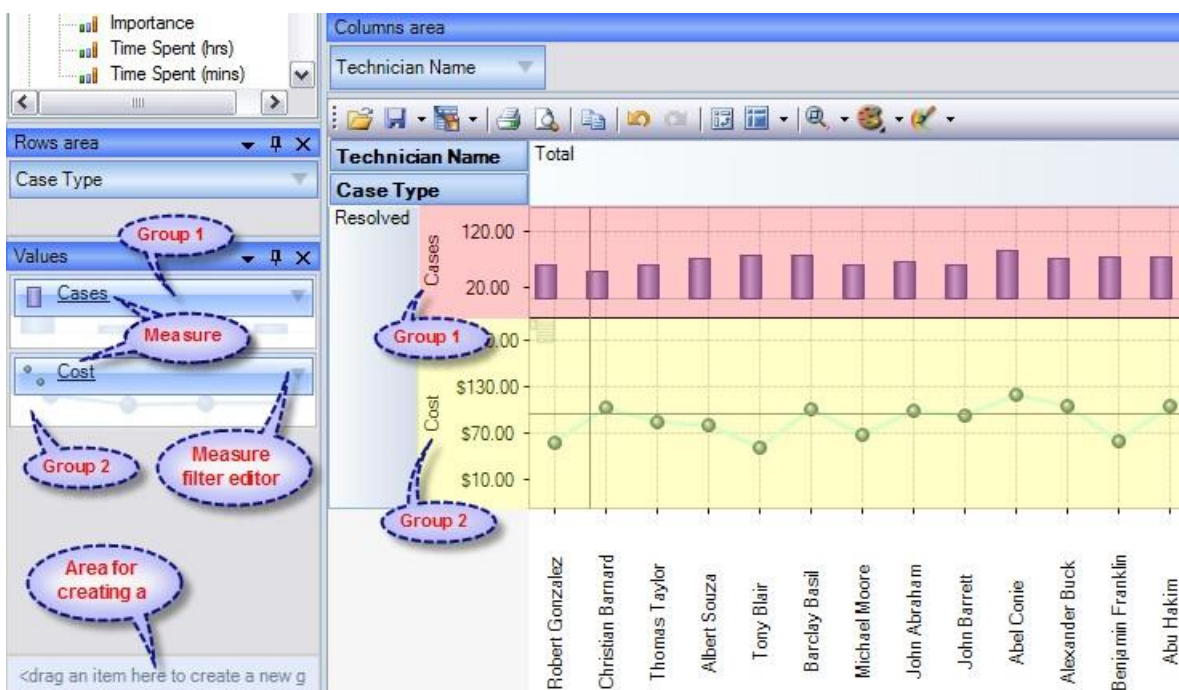
A pivot table lets user design the report online by dragging and dropping measures, dimensions and levels into the pivoting panels. Note that the column panel may contain no more than one (!) measure. Panel elements can be dragged with the mouse to other panels. To filter elements, press the Filter button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

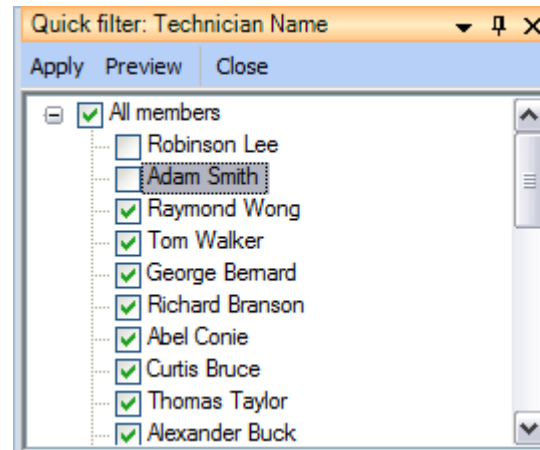


8

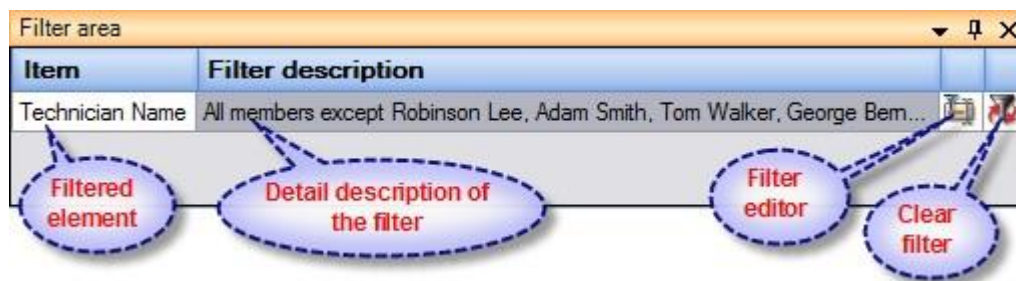
**Filter panel**

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**

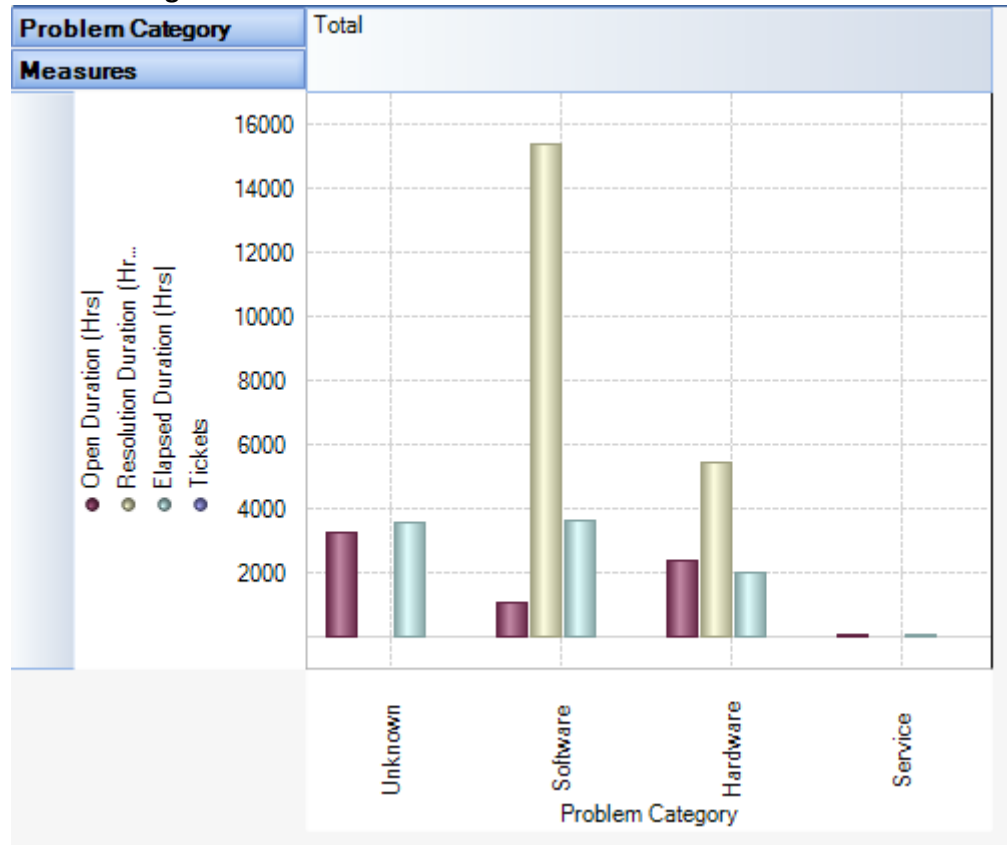
The OLAP-slice data is displayed in working area. In its upper part there is a menu for the quick access to the frequently used commands<sup>2</sup>. The rest is occupied by the current OLAP-slice and consists of the following parts - Cube Axis headers, Cube Axes, Data Axes, Data Axis headers, Chart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

| Measures                        | Tickets | Elapsed Duration (Hrs) | Resolution Duration (Hrs) | Open Duration (Hrs) |
|---------------------------------|---------|------------------------|---------------------------|---------------------|
| <b>Problem Category</b> [v] [x] |         |                        |                           |                     |
| <b>Problem Type</b> [v] [x]     |         |                        |                           |                     |
| Software                        | 14      | 3652.93                | 15377                     | 1089.47             |
| Office 2007                     | 5       | 461.38                 | 13017                     | 783.21              |
| Excel                           | 1       |                        | 2360                      | 39.2                |
| IE                              | 4       | 67.04                  |                           | 139.34              |
| Office 2008                     | 1       | 3124.51                |                           | 84.34               |
| Outlook                         | 3       |                        |                           | 43.38               |
| Hardware                        | 16      | 2010.51                | 5462                      | 2400.99             |
| Dell XPS                        | 9       | 1646.45                | 89                        | 1841.88             |
| Sony VAIO                       | 5       | 257.58                 | 5373                      | 295.43              |
| MacBook                         | 1       | 68.47                  |                           | 92.47               |
| Mozilla                         | 1       | 38.01                  |                           | 171.21              |
| Service                         | 1       | 68.54                  |                           | 92.54               |
| Total                           | 31      | 5731.98                | 20839                     | 3583                |

Chart working area



## 10.2 Working with OLAP Grid

The OLAP Grid view 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. 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 its greatest benefits is that it allows users to explore, navigate and refine data until the desired snapshot is achieved. Once in place this snapshot can 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.

The screenshot displays the OLAP Grid view interface. On the left, the 'Cube structure tree' shows a hierarchy of measures and dimensions. The 'Filter area' at the top right contains filters for 'Case Type' (Resolved) and 'Category by Type' (All members except Music Players, Accessories). The 'Columns area' shows 'Case Type' and 'Measures'. The main grid displays data for 'Time Spent (hrs)' across various categories and problem types.

| Case Type        |                  | Resolved     | Total        |
|------------------|------------------|--------------|--------------|
| Problem Category | Problem Type     |              |              |
| 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         |
|                  | <b>Services</b>  | <b>91.55</b> | <b>91.55</b> |
| Applications     |                  | 84.45        | 84.45        |
| Notebooks        | MacBook Air      | 14.83        | 14.83        |
|                  | MacBook Pro      | 14.82        | 14.82        |
|                  | MacBook          | 13.73        | 13.73        |
|                  | <b>Notebooks</b> | <b>43.38</b> | <b>43.38</b> |

- ✓ 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         |
| Ctrl+End  | Move to the bottom right cell     |

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

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

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

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

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

### 3. Drilling, sorting and moving hierarchy members

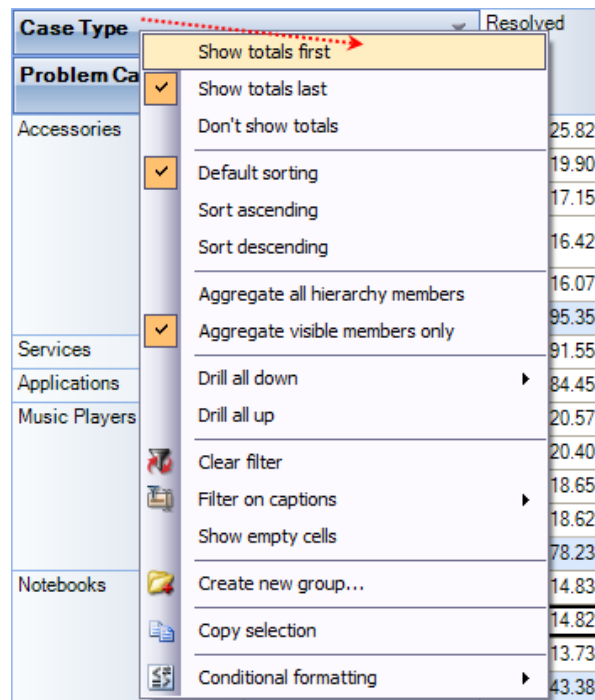
- To perform the drilling of the hierarchy members press buttons on the Grid cells. If there's only one drilling button in a cell, then, instead of pressing it, you can double-click the cell itself. By default, the drilling buttons are shown only in the cells under mouse. To see all the buttons, press the Ctrl button. The last cells in the column area of the hierarchy members allow showing the sorting direction.

A pointer that indicates the descending order of data illustrates it. You can manage the sorting modes by single clicking on the cells of the specified area: they are changed cyclically [descending sorting] -> [ascending sorting] -> [no sorting].

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



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

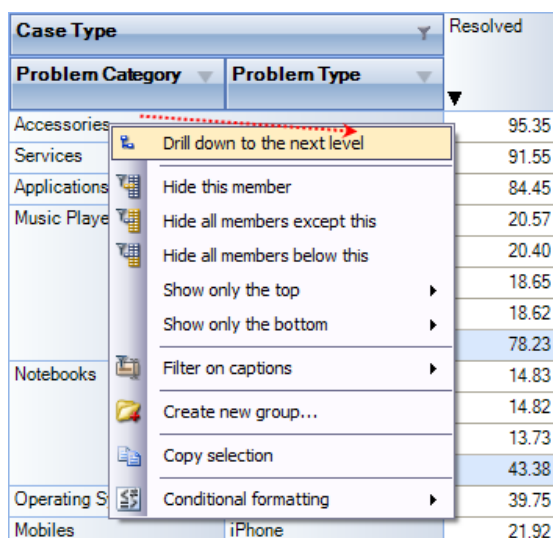


#### Hierarchy levels' menu

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

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

#### Hierarchy members' menu

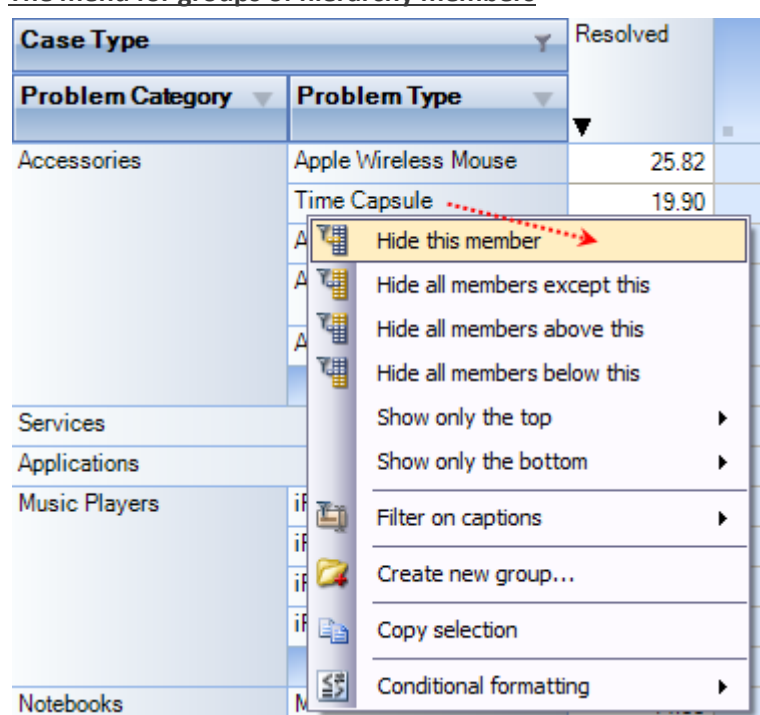




The view of the context menu of the hierarchy members' area

| Command                                 | Function  |
|---|---|
| <b>Drill down to the next hierarchy</b> | Open the node up to the next hierarchy in the current area, ignoring all the lower levels of the current hierarchy  |
| <b>Hide this member</b>                 | Hide the member   |
| <b>Hide all members except this</b>     | Hide all the members of the hierarchy, except the selected one  |
| <b>Hide all members above this</b>      | Hide all the members of the hierarchy above the selected one  |
| <b>Hide all members below this</b>      | Hide all the members of the hierarchy below the selected one  |
| <b>Show only the top</b>                | 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.<br><br>You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.    |
| <b>Show only the bottom</b>             | 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.<br><br>You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu. |
| <b>Filter on captions</b>               | Set the filter for measures   |
| <b>Create new group..</b>               | Create a new group on the current level   |
| <b>Copy selection</b>                   | Copy the selected area to clipboard   |
| <b>Conditional formatting</b>           | Show the Conditional formatting menu  |

#### The menu for groups of hierarchy members



The context menu that appears above the group cell.

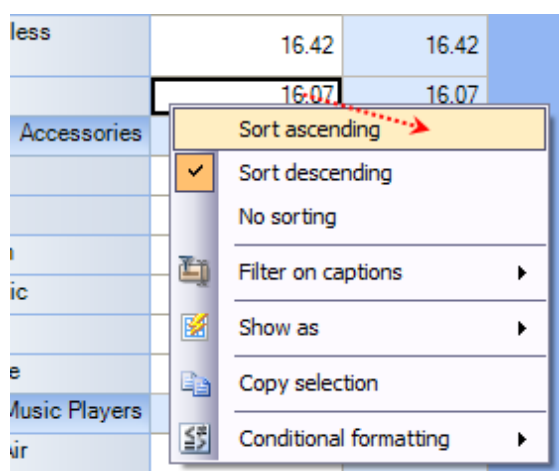
| Command                             | Function   |
|-------------------------------------|--|
| <b>Hide this member</b>             | Hide the selected member   |
| <b>Hide all members except this</b> | Hide all the hierarchy members except the selected one   |
| <b>Hide all members above this</b>  | Hide all the hierarchy members above the selected one  |
| <b>Hide all members below this</b>  | Hide all the hierarchy members below the selected one  |
| <b>Show only the top</b>            | 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.<br><br>You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu. |
| <b>Show only the bottom</b>         | 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.

|                               |                                     |
|-------------------------------|-------------------------------------|
| <b>Filter on captions</b>     | Set the filter for measures         |
| <b>Create new group</b>       | Create a new group                  |
| <b>Delete this group</b>      | Delete the selected group           |
| <b>Clear this group</b>       | Clear the selected group            |
| <b>Rename this group</b>      | Rename the selected group           |
| <b>Copy selection</b>         | Copy the selected area to clipboard |
| <b>Conditional formatting</b> | Show conditional formatting menu    |

### Measure values' menu



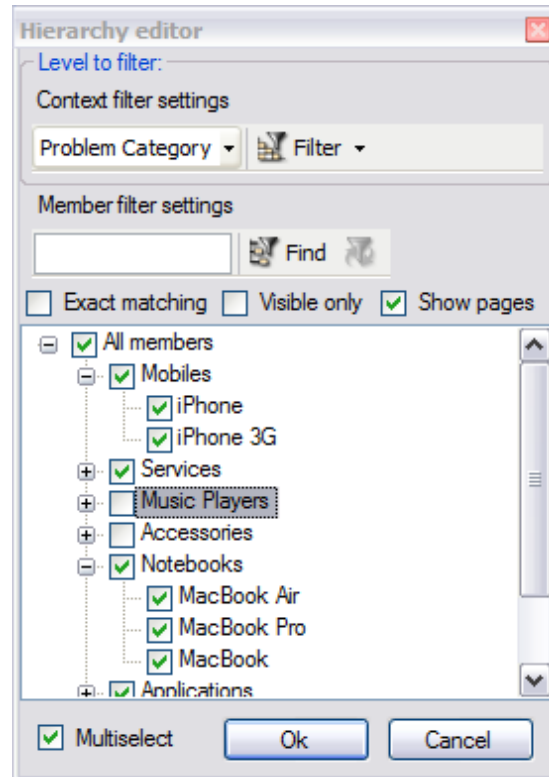
The context menu that appears above the group cell:

| Command                       | Function  |
|-------------------------------|---|
| <b>Sort ascending</b>         | Range the cells in the column by values from the bottom to the top  |
| <b>Sort descending</b>        | Range the cells in the column by values from the top to the bottom  |
| <b>No sorting</b>             | Remove any sorting  |
| <b>Filter on captions</b>     | Set the filter for measures   |
| <b>Hide this measures</b>     | Hide the selected measure   |
| <b>Show as</b>                | Specify the display mode of the current measure in the Grid:<br>default<br>percent aggregated value in the row<br>percent parent element of the row<br>percent parent element of the column<br>percent total aggregated value |
| <b>Copy selection</b>         | Copy the selected area to clipboard   |
| <b>Conditional formatting</b> | 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.

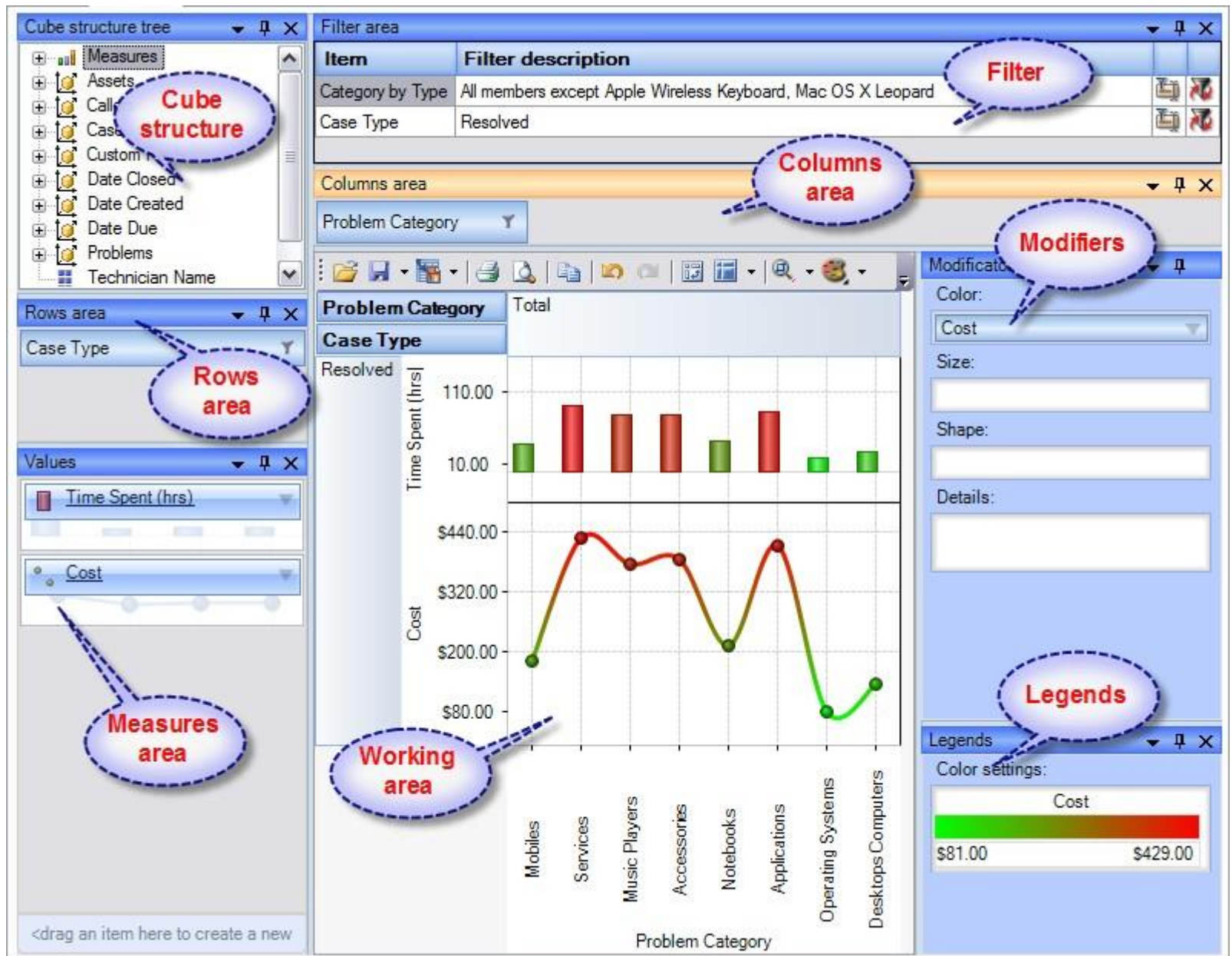


**6. Setting the columns' width** - You can change the width of columns in the data display area by dragging the right boundary with the mouse. If possible, these changes will be saved during other operations with the table (like drilling, sorting, etc.) To return to the original width, double click 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.



## 10.3 Working with OLAP Chart

While the Grid view allows working with numbers, chart view allows representing the data graphically. This gives you and other managers a unique opportunity to analyze reported data visually, as dealing with charts rather than numbers, is much easier. 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 |

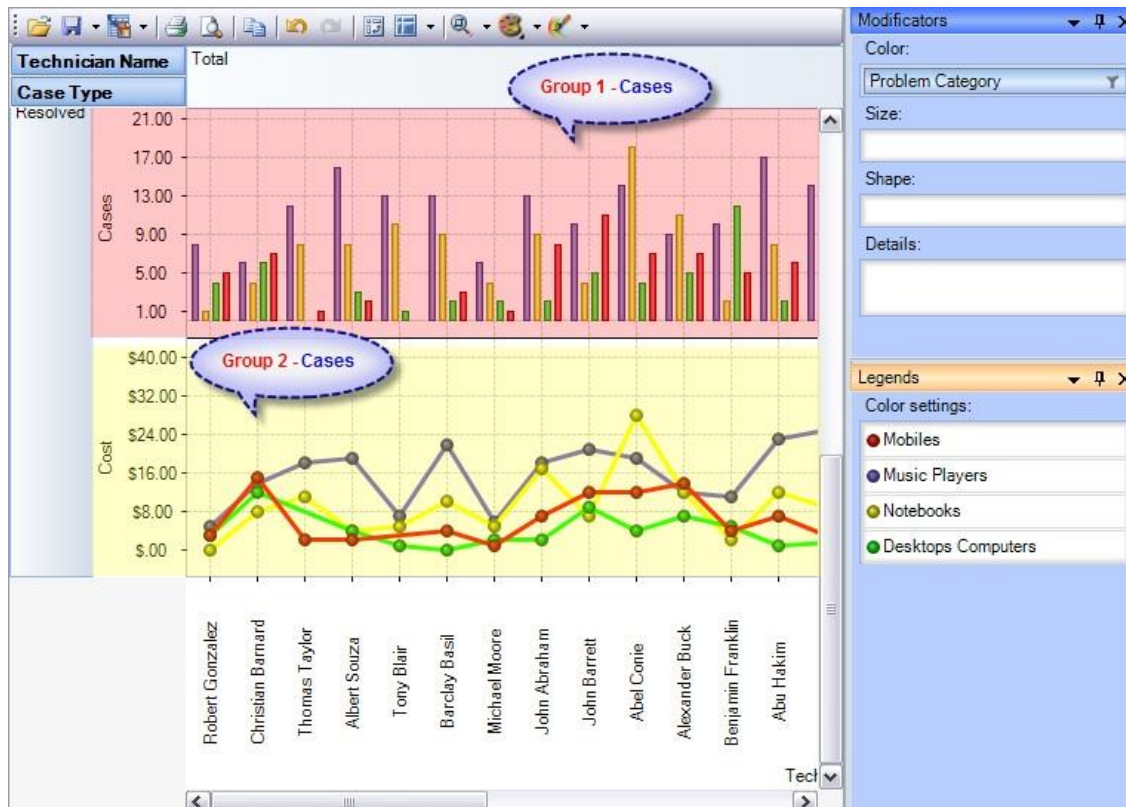
### Modifier panel

Modifiers 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 modifier'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...   |   |
|----------|--|---|
|          | <i>a measure</i>   | <i>a hierarchy</i>  |
|          | 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.

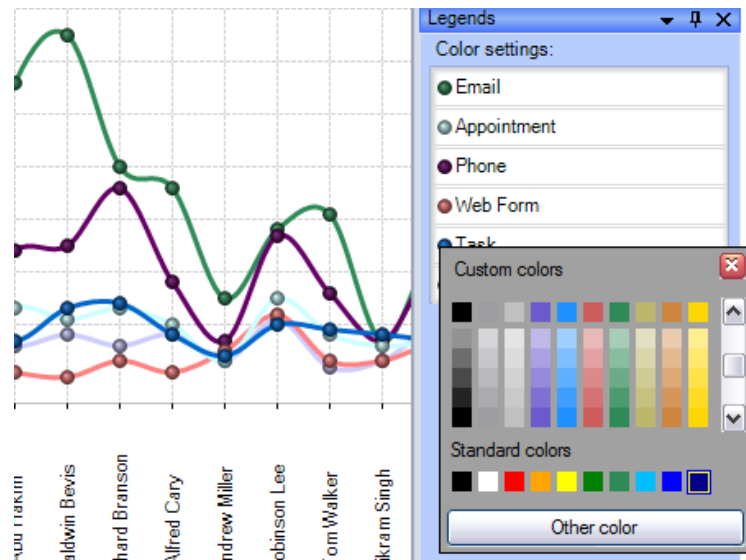


### The Legend panel

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

#### Setting the Color legend

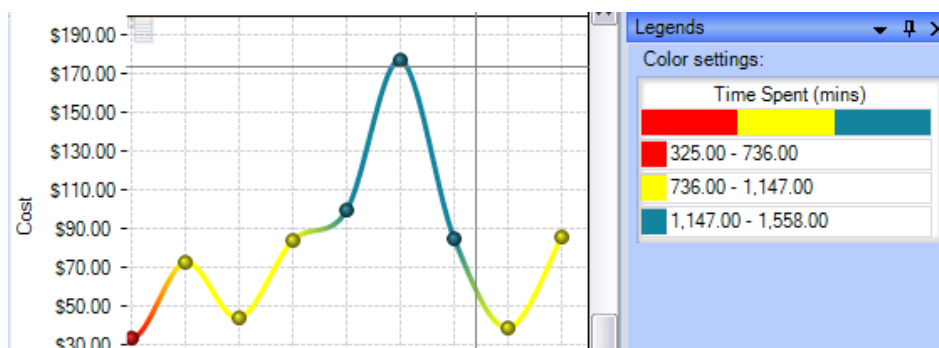
To select a color, simply double-click the appropriate element and choose a color from the pop-up editor.



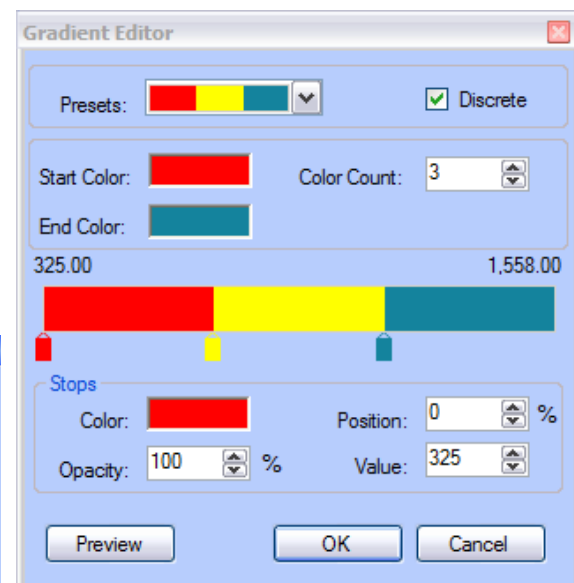
#### Setting the Gradient legend

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;

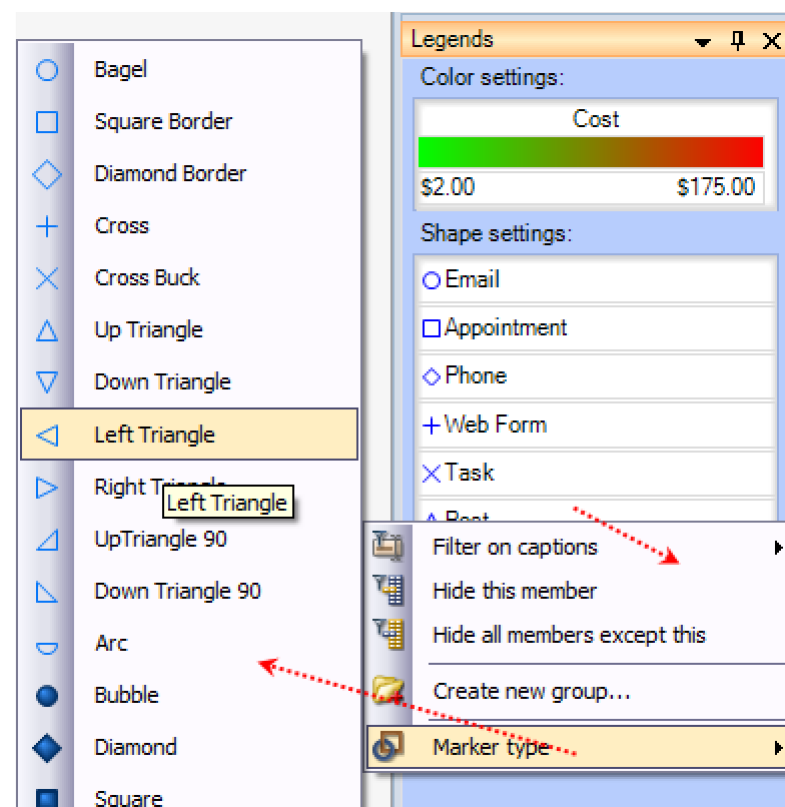


Selecting threshold color option.



### Setting the Shape legend

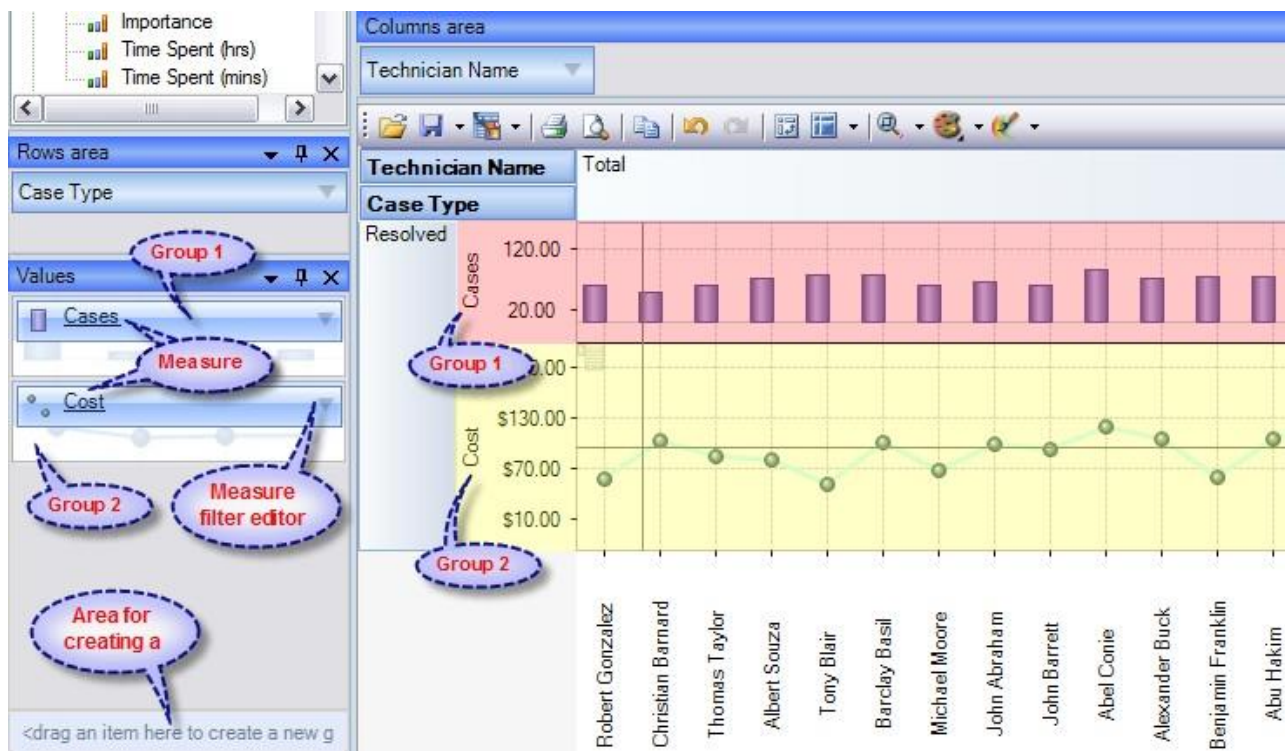
The shape selection is made through the context menu. This option is available only for points or lines Charts. If the number of hierarchy members exceeds the number of available shapes, they will be repeated.



### 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.

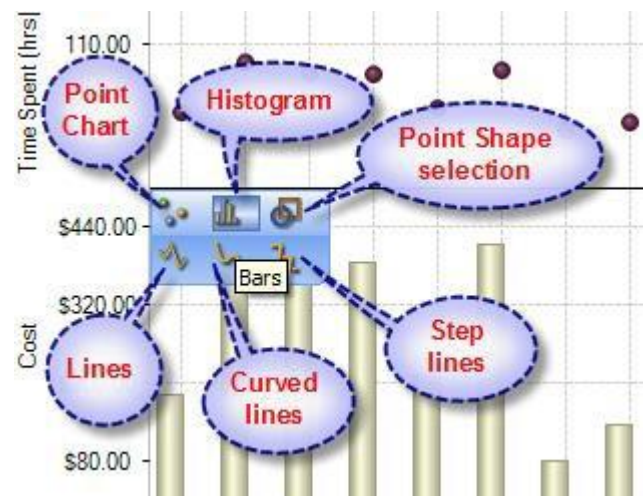


Chart type menu

### 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.

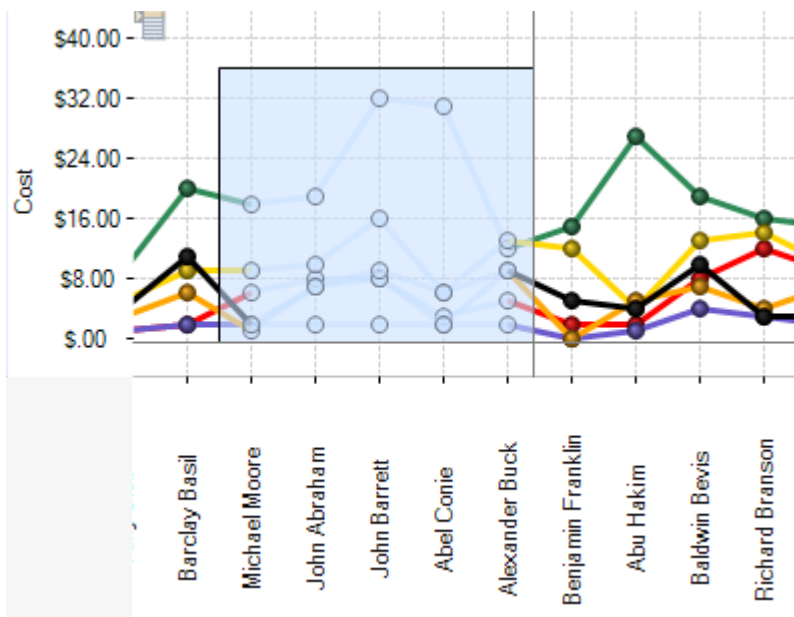
### Selecting Data

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.

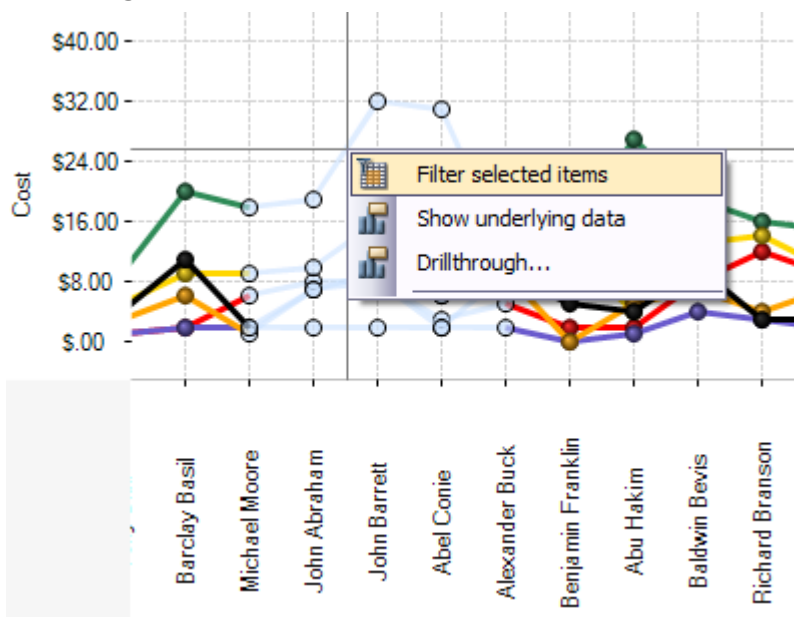
### Selecting and filtering parts of Charts

a. Selecting some of the Chart points

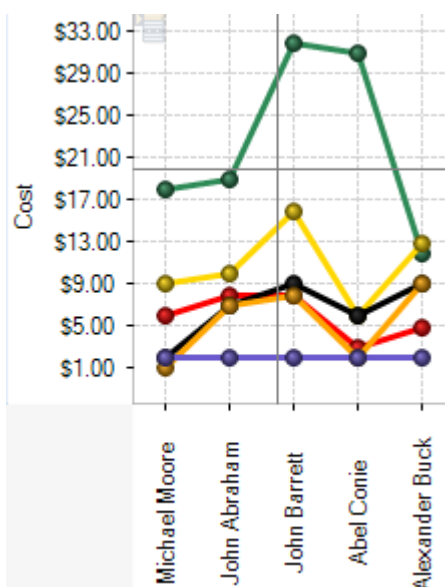




b. Selecting the Filter command



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

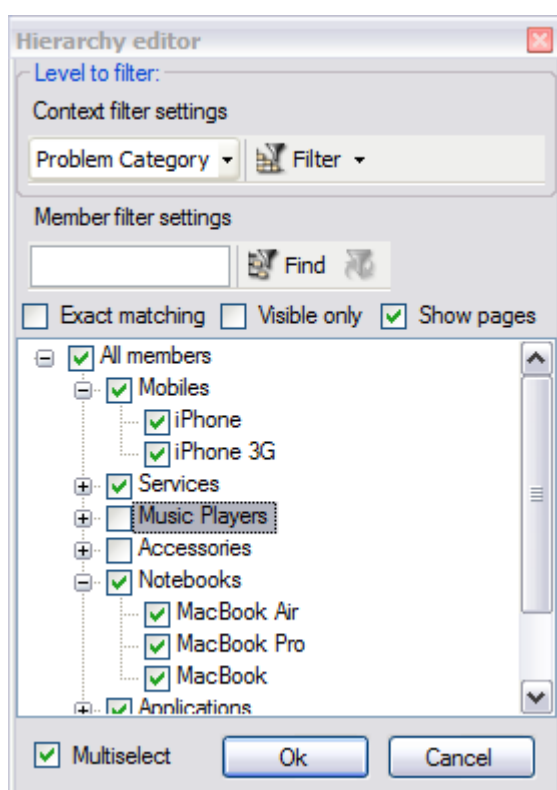
The Filter area of the Editor becomes visible only in case if filtering by hierarchy levels is available. To apply a filter to hierarchy members, you need to select a hierarchy level (if there's more than one) and assign the Filter condition in the Filter menu. In the same menu, there's a command to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

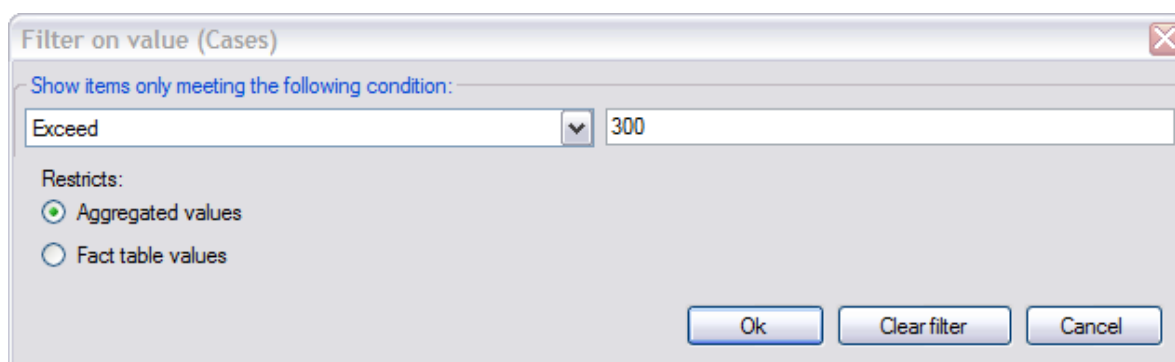
### Filtering a single member of a hierarchy

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.

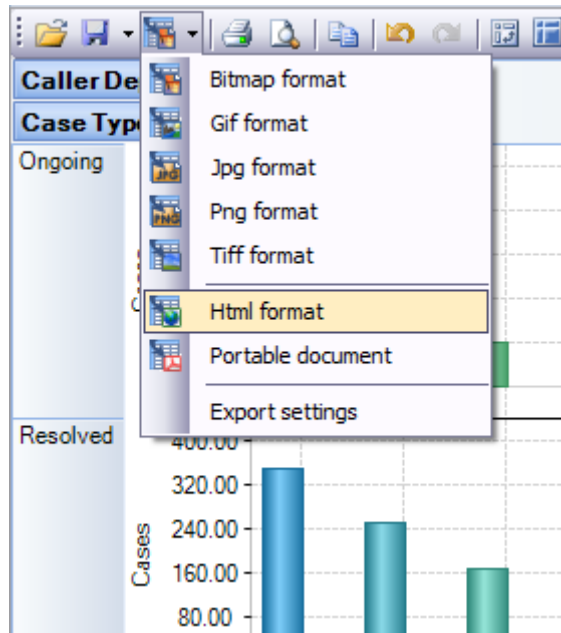




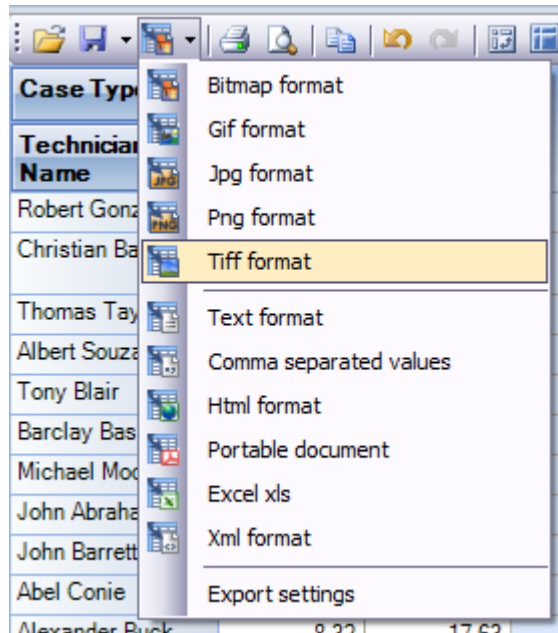
## 10.4 Printing, exporting statistical data and charts

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 Chart), the saved file would either take the grid data or the chart.



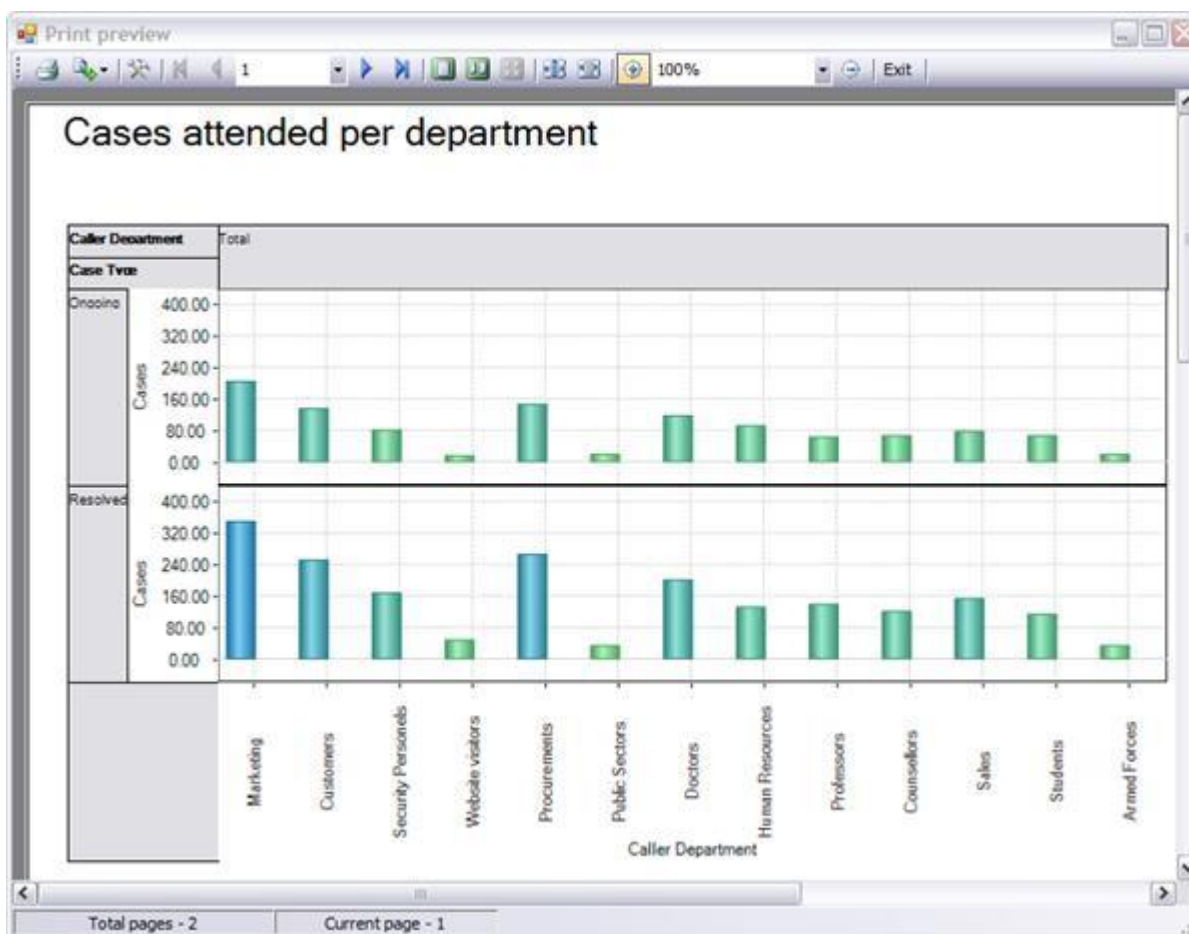
Available export formats in Chart View



Available export formats in Grid View

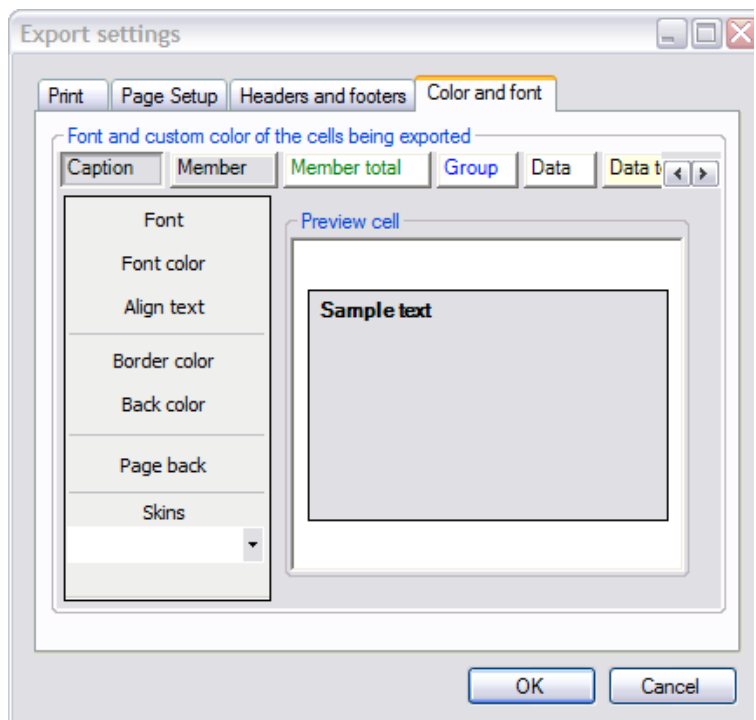
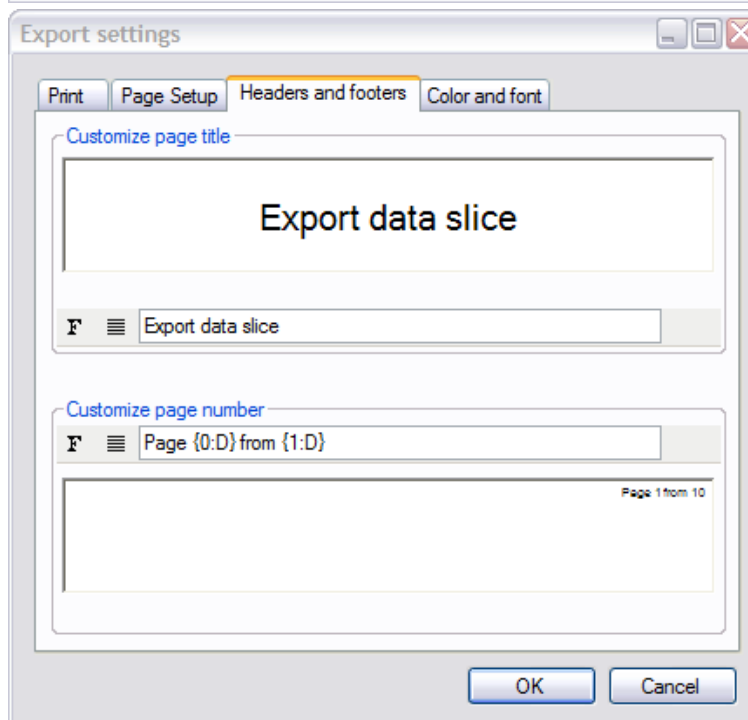
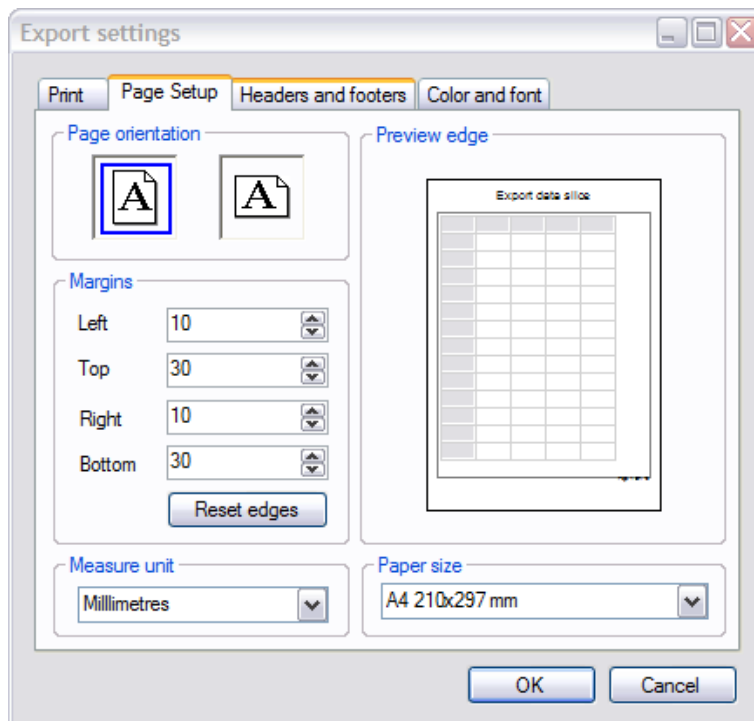
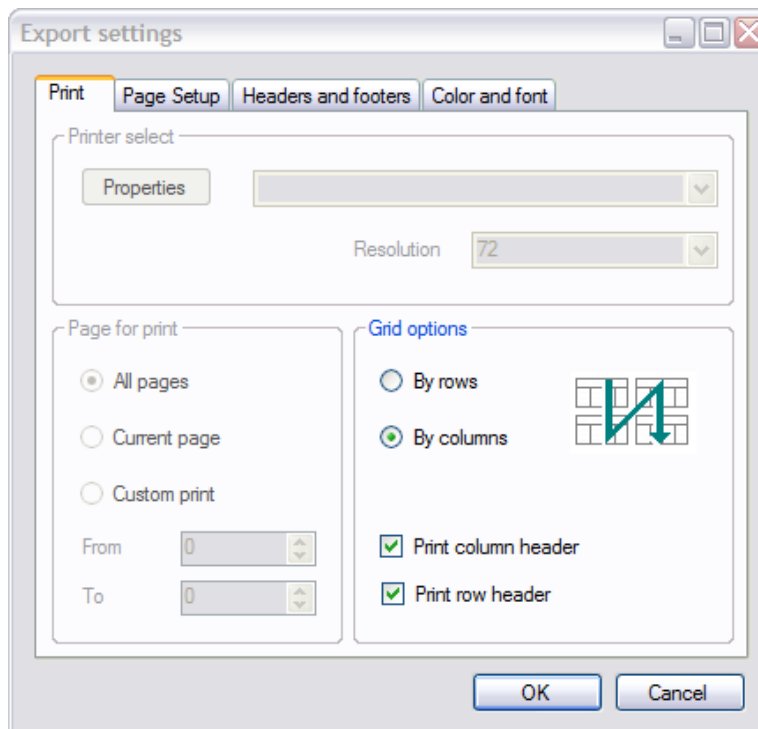
### Printing

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.





## 11. Uninstalling AssistMyTeam Issue Tracker

To uninstall the AssistMyTeam Issue Tracker from your computer, follow the steps outlined below:

**Step 1:** In Windows, open 'Control Panel > Programs and Features'. Scroll down to select '**Issue Tracker Admin Tool**' or '**Issue Tracker Technician Tool**' and click 'Uninstall'.

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

**Step 3:** The Issue Tracker setup will now start the un-installation process. Make sure that Microsoft Outlook is not running (even under the task manager). You can click 'Cancel' to exit the current setup.



## 12. Important Links

### [Issue Tracker for Outlook and SharePoint - Home page](#)

Go to the official website of Issue Tracker for Outlook and SharePoint.

### [Video Tutorial clips](#)

Watch video tutorials that teach you how to install, configure and work with Issue Tracker.

### [Knowledgebase articles](#)

Looking for an in-depth understanding of this application? Browse through a series of knowledge base articles on Issue Tracker 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.

