Team Helpdesk for Outlook & SharePoint

Help Manual for Administrators

Welcome

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

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

1. Introduction

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

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

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

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

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

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

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

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

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

Team Helpdesk for Outlook & SharePoint

Team Helpdesk is an ITIL guided, issue tracking and ticketing system with integrated asset management that is available as an add-on for Microsoft Outlook. It is the only comprehensive helpdesk system entirely integrated seamlessly within your Microsoft Outlook, transforming it from a simple email client to a fully-fledged service provider. Using Microsoft Exchange and SharePoint as repository for storing support cases, it provides support staffs with all the necessary tools to log, collaborate, analyze and assist in the resolution of help desk issues. Various medium of communication supports automated messaging and notification requiring no human inputs.

Apart from e-mail, the ability to send SMS and make phone calls directly from your Outlook extends the exchange of information to a new level, thereby, making it possible to integrate customer relationship management (CRM) processes in core help desk functionalities.

With inbuilt support for advanced statistics and varied reporting options, support managers can evaluate the performance of the helpdesk and in-turn ensures timely decision making for improved service. Most of the Team Helpdesk functionalities in Outlook are also available via a web browser through web access - perfect for remote support staffs. Furthermore, caller can submit new support requests via a web form, login to caller web access to track and escalate support cases, check status, or search through the knowledge base, all via a web browser for first level support.

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

Benefits for your organization:

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

Benefits for your customers:

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

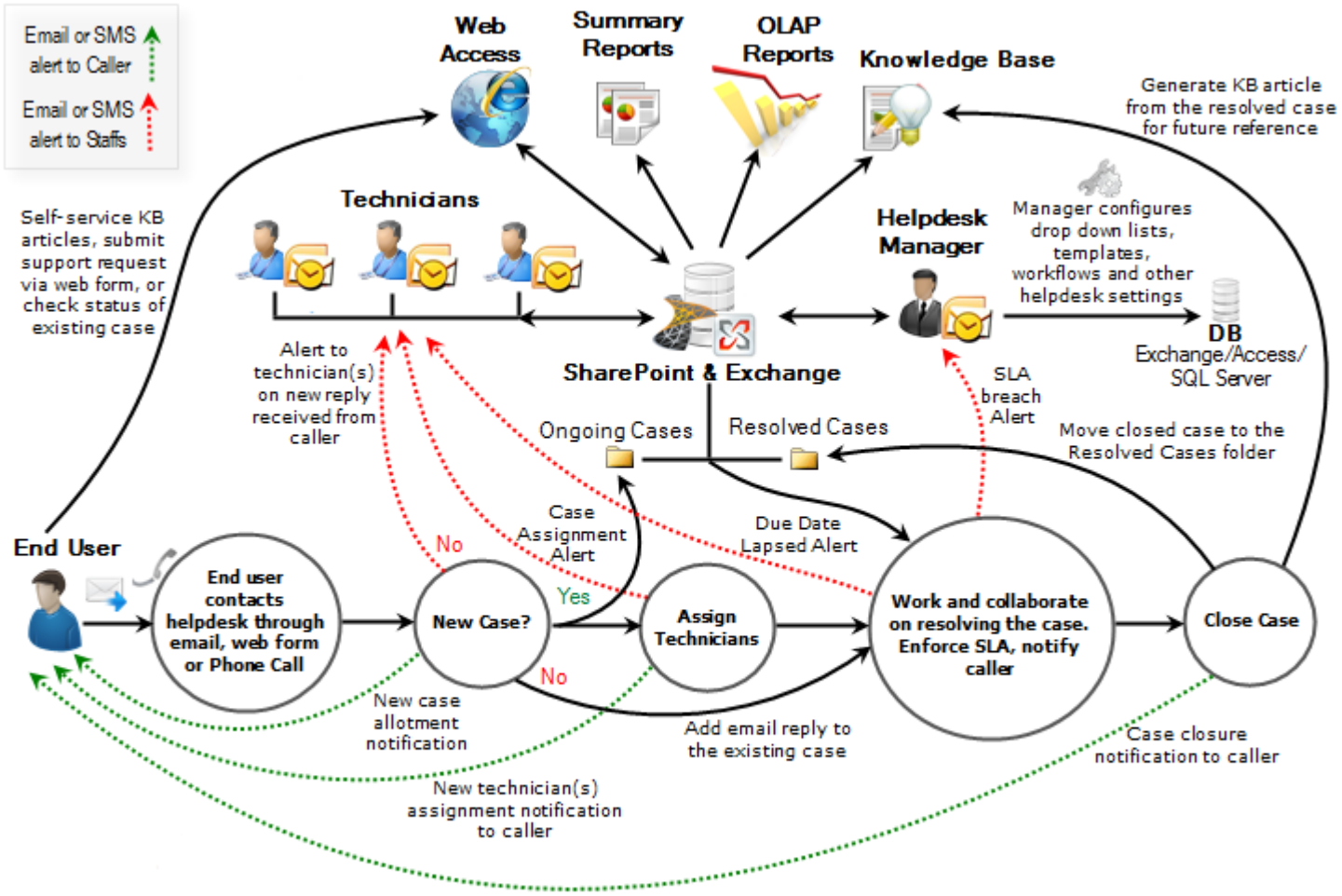
How It Works?

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

- The Managerial install is for **helpdesk administrator** who would configure and maintain the Team Helpdesk folders, drop down lists, templates, FAQs and other helpdesk settings.

- The Agent install is for the **technicians** to enable them to work on support cases in Outlook with the configured Team Helpdesk folders.

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

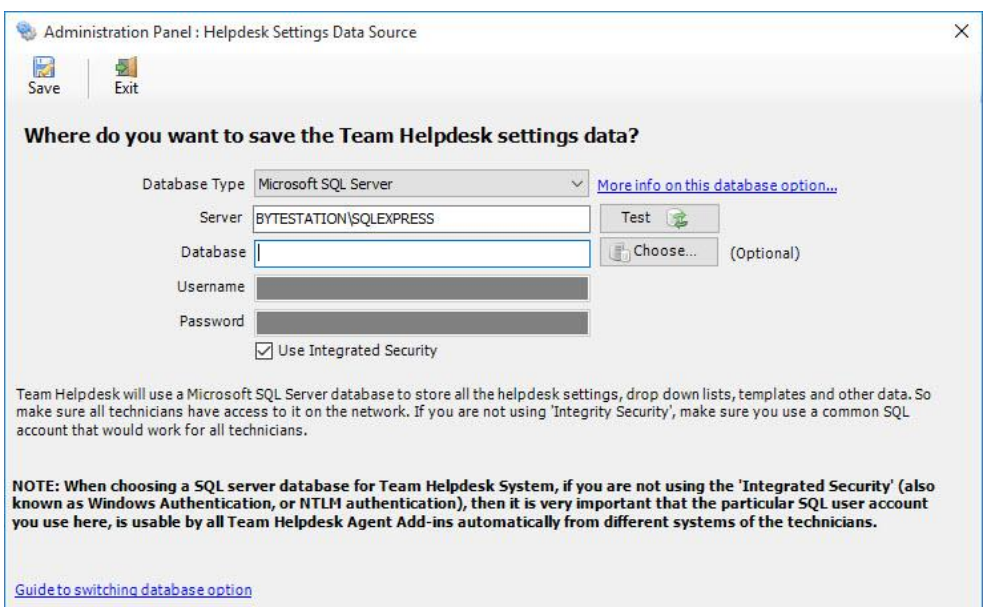


Flowchart - Team Helpdesk for Outlook & SharePoint

Step 1. Manager creates a settings database

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

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

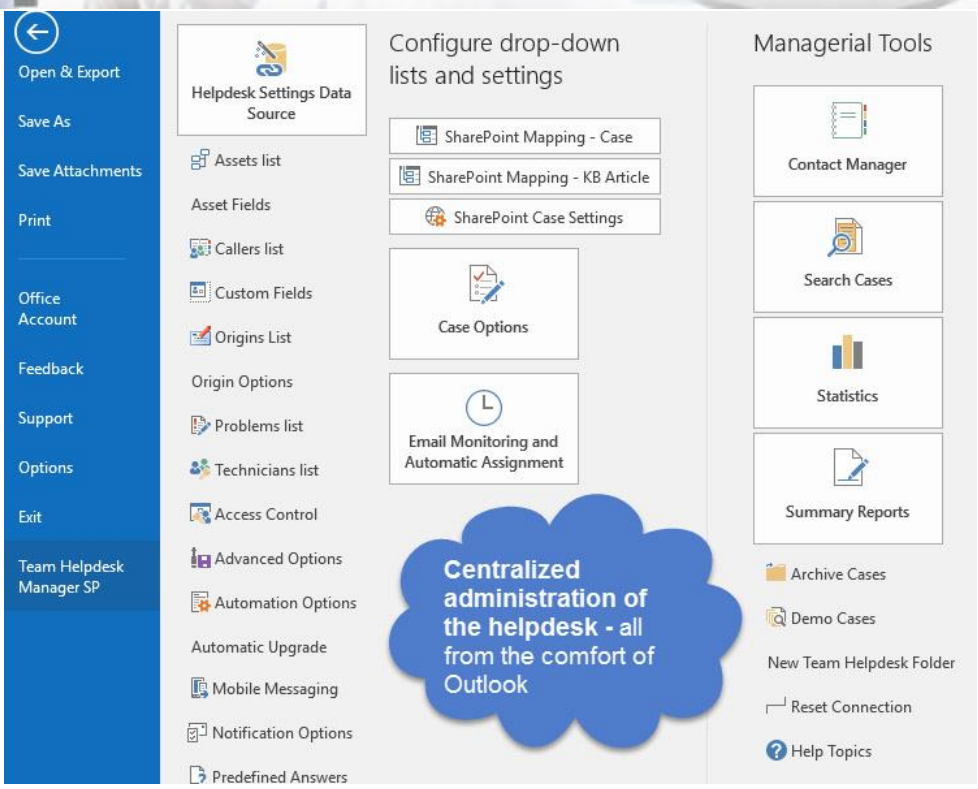


Back to TOC

Step 2. Manager configures helpdesk settings and drop downs

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

Administrator can also set the manager add-in to monitor any number of mailboxes and email folders, for automatic processing of incoming emails to support cases. This process cuts the overhead of manually generating support cases from emails, thus diverting valuable human resources to resolving the case.

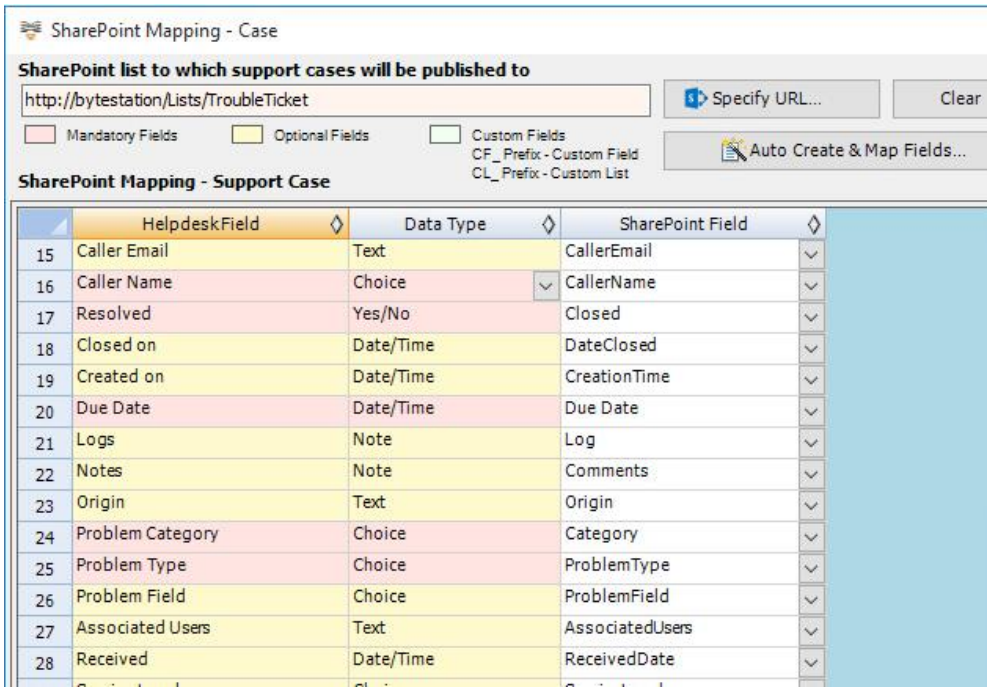


Step 3: Manager maps helpdesk fields from Outlook to SharePoint

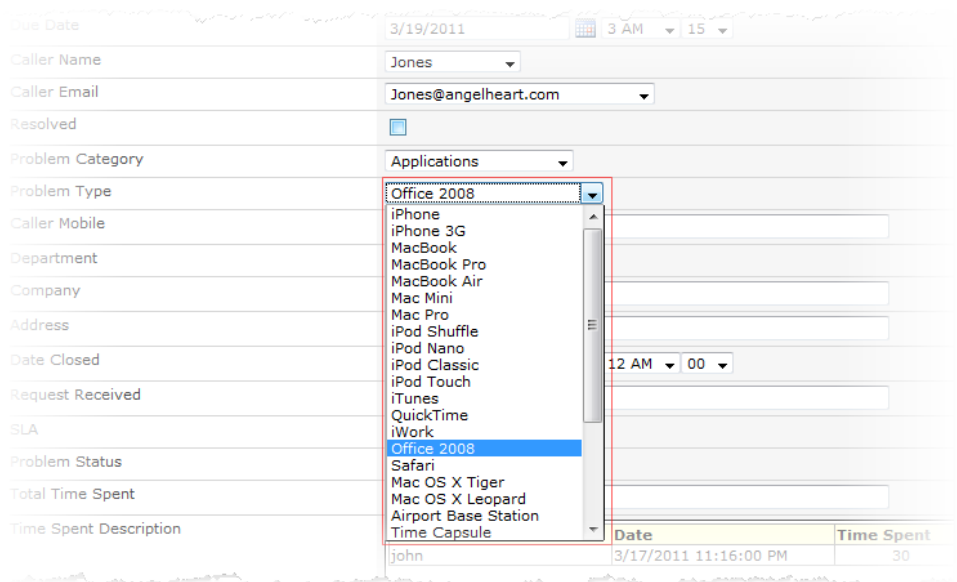
The next step is for the helpdesk manager to configure a SharePoint list to be used as for storing copies of support cases that were generated in the 'Ongoing Cases' subfolder of Team Helpdesk in Outlook.

New fields in the SharePoint list can be automatically created to match the data type and title of the Outlook helpdesk fields.

If the particular mapped field takes a drop-down list in Outlook such as Problem Category, Problem Type, Status, Callers Name etc., the same drop-down list values would be available in the configured list automatically. Over time, as manager make changes to the drop-down lists in Outlook, Team Helpdesk would automatically update the values in SharePoint too.



	HelpdeskField	Data Type	SharePoint Field
15	Caller Email	Text	CallerEmail
16	Caller Name	Choice	CallerName
17	Resolved	Yes/No	Closed
18	Closed on	Date/Time	DateClosed
19	Created on	Date/Time	CreationTime
20	Due Date	Date/Time	Due Date
21	Logs	Note	Log
22	Notes	Note	Comments
23	Origin	Text	Origin
24	Problem Category	Choice	Category
25	Problem Type	Choice	ProblemType
26	Problem Field	Choice	ProblemField
27	Associated Users	Text	AssociatedUsers
28	Received	Date/Time	ReceivedDate

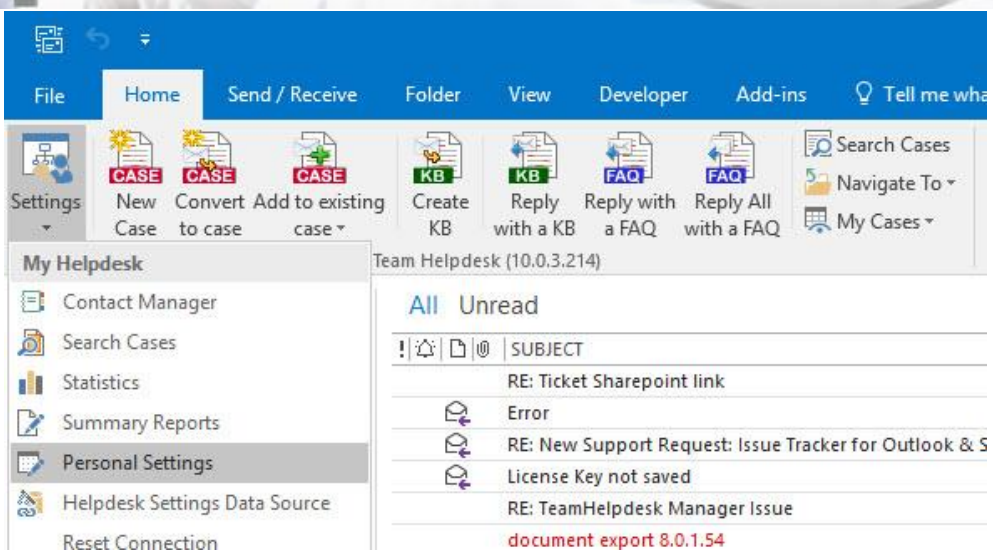


Step 4: Technician installs Agent add-in

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

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

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

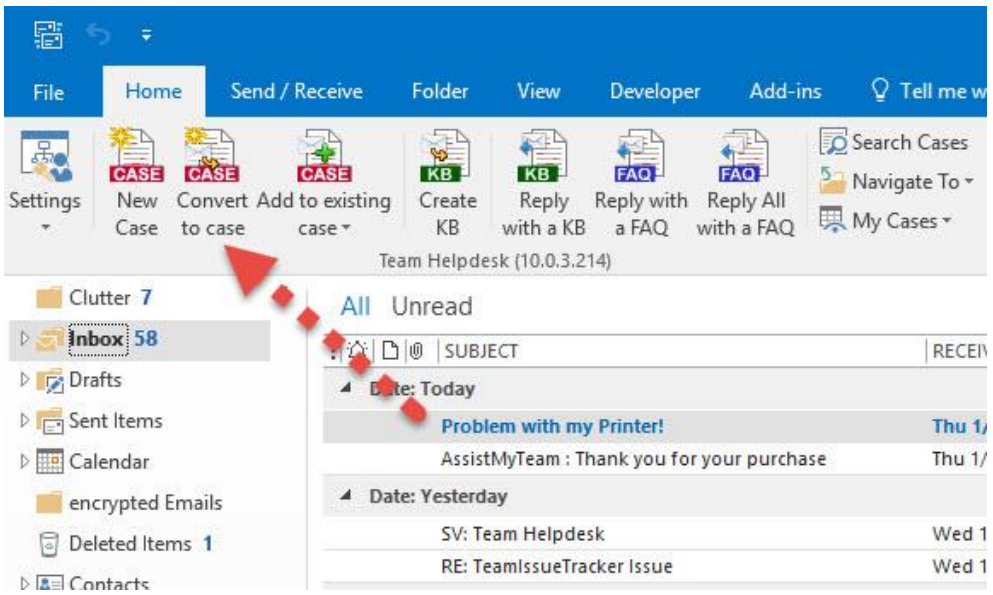


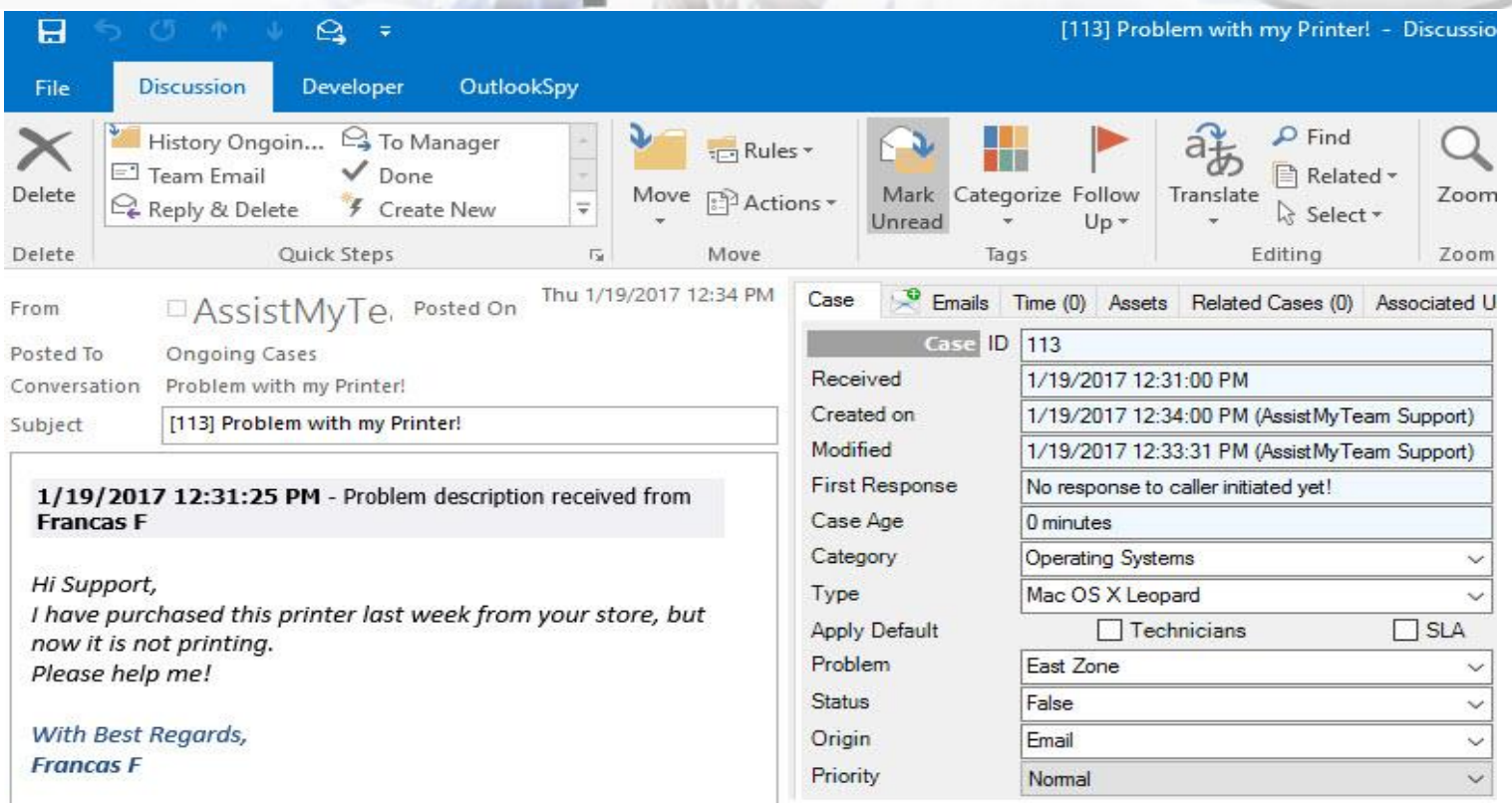
Step 5. Caller submits support request via email, web form or phone call

An end-user experiencing technical challenges can self-service the answer to their problem by accessing the web-based knowledge base (through the Team Helpdesk Customer Web Service site).

If a solution is not found, the end-user requests for support by sending an email, by making a phone call or simply, by filling a web form. These support requests are then logged and converted to cases in Outlook.

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

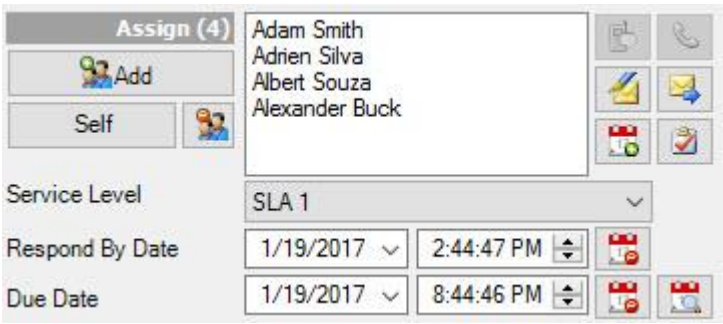




Step 6. Assign technicians to the case

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

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



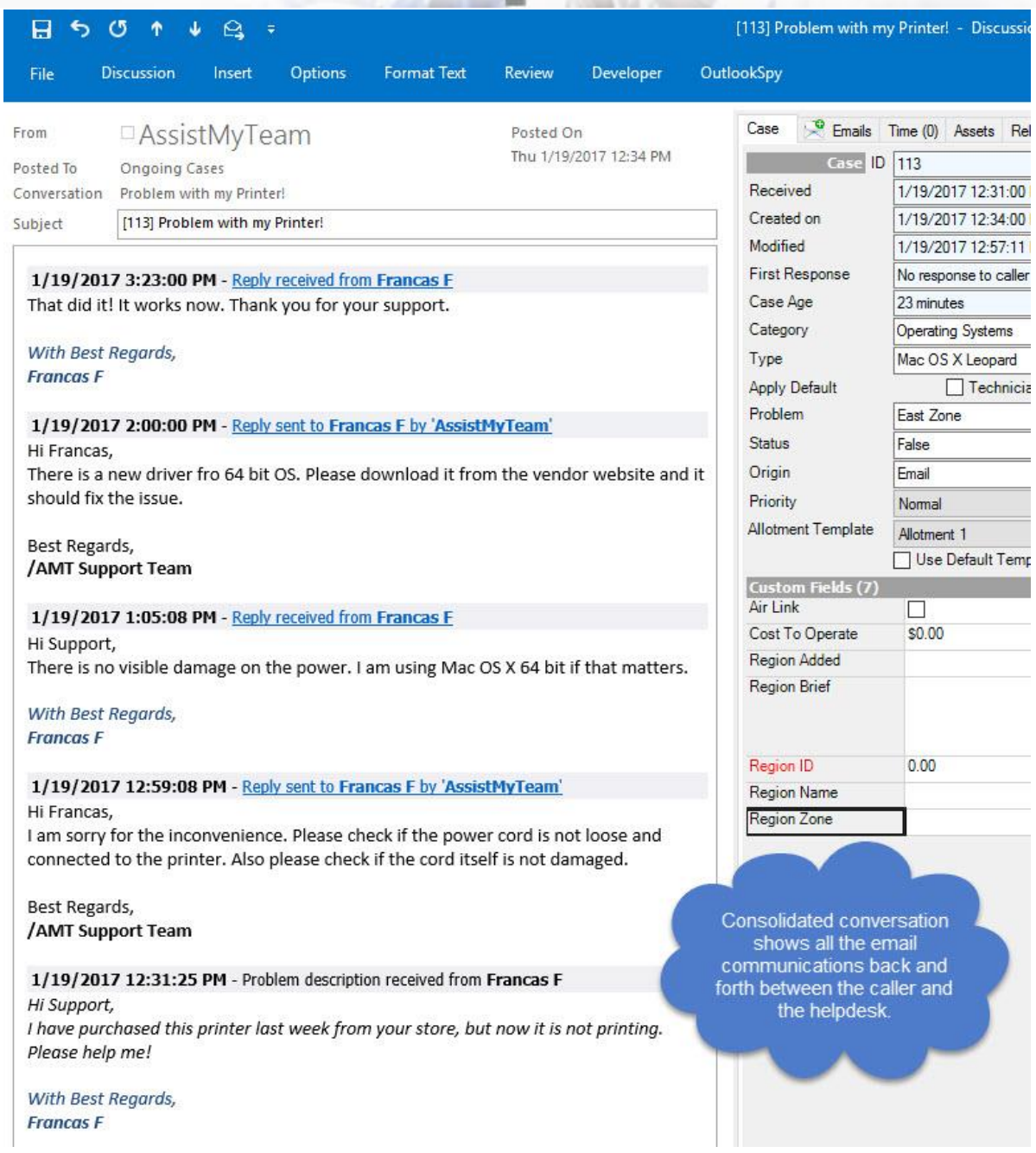
Assigned technicians then get notified through an automated email or SMS. Optionally, the due date of the case is entered into the personal calendar of the technicians' mailbox.

Step 7. Technicians collaborate to resolve the case

The assigned technician then proceeds to fulfill and resolve the case, either in Outlook or via Technician Web Access (TWA). Helpdesk manager may enforce a Service Level Agreement (SLA), set due date and other deliverables on the particular case for the assigned technicians, for quality check purposes. Further correspondence to the caller might follow (in the form of emails, SMS, phone calls). All activities related to the case are logged and technician can fill time spent and assign additional technician if needed. Relevant asset information and fixes related to the case can be accessed and tracked right from the case form itself.

Step 8. Caller follows-up via email

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



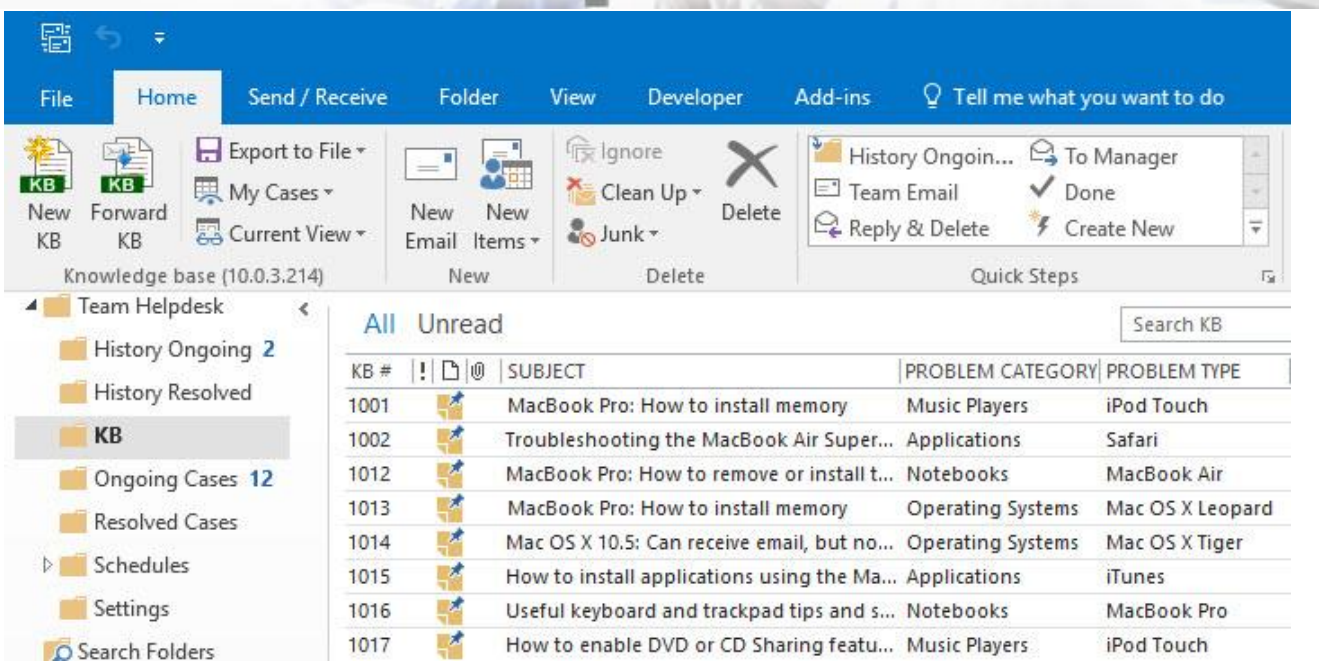
Alternatively, caller can also choose to escalate, withdraw, reopen or simply track the history of their support cases online by logging into the Caller Web Access (CWA) website (that comes with Team Helpdesk).

Step 9. Technician closes case after providing a resolution

Certain pre-defined Outlook views can be used to track the progress of cases. Once every parameter of the caller's request has been fulfilled, a case be closed. The closed case is then moved to the Resolved Cases folder. At the same time, the caller gets notified automatically on the closure of the case.

Step 10. Technician adds resolution to knowledge base

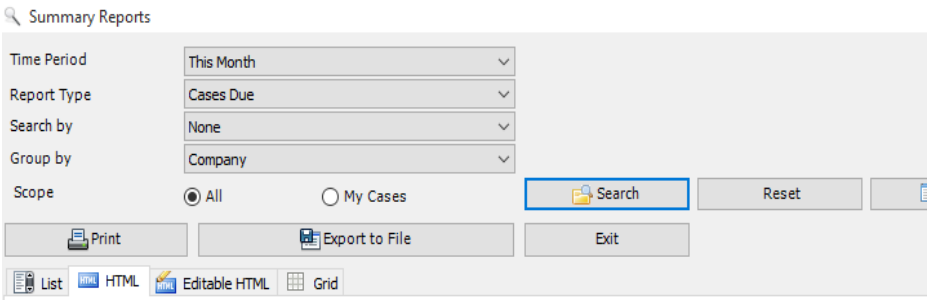
A closed case can be a good source of future reference and technician can create a new knowledge base entry based on the case. It is then available in the list of articles under the integrated knowledge base, categorized and sorted, ready for your technicians to draw from when similar issues arise. Helpdesk administrator can publish these articles on to the Customer Web Service site for providing first level support to potential support requests from end-users.



Step 11. Manager generates statistical and trend reports

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

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



Report

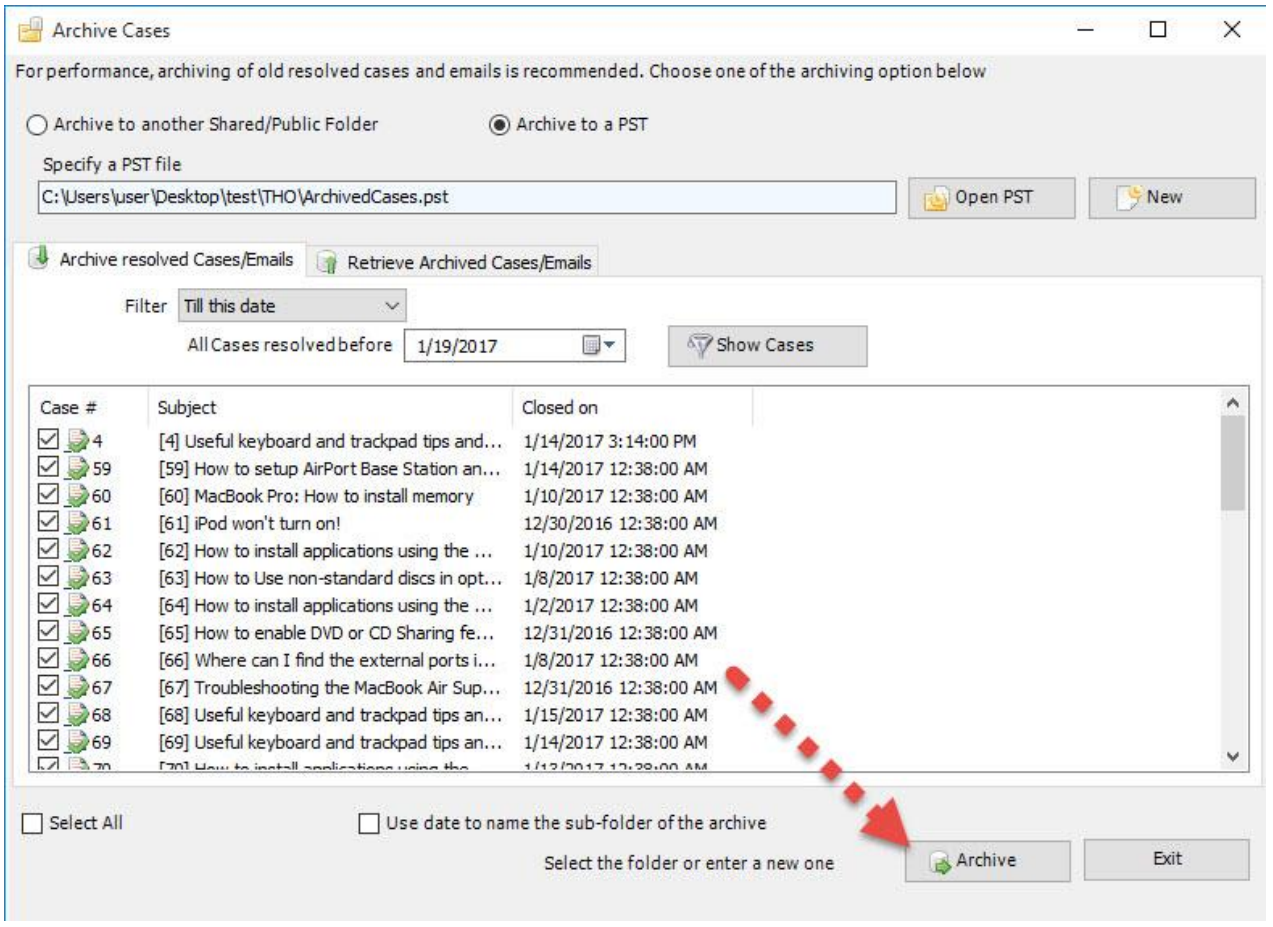
Generated by : **AssistMyTeam Support**
Time : **1/18/2017 12:08:07 AM**

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

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

Step 12. Manager archives old cases to database or PST

Over time, the Team Helpdesk folders (in Exchange) will be accumulated with support cases mostly resolved ones. Helpdesk managers can either archive the old case items to a PST file or can export the case data to an external database such as Oracle, SQL or Access. Archiving periodically keeps the exchange folder from getting too big and unwieldy, which could cause Exchange/Microsoft Outlook performance to slow down.



2. Requirements

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

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

Windows Version	Windows Vista, 7, 8, 8.1, 10. Both 32-bit and 64-bit OS are supported.
Outlook Version	Outlook 2019, 2016, 2013, 2010, Outlook 2007. Team Helpdesk operates directly inside the Microsoft Outlook application (using Microsoft's "COM add-in" technology). Outlook Express is not supported.
Database	Microsoft Access, all versions and editions (including Express edition) of SQL Server are supported including cloud services such as Amazon RDS and Microsoft Azure SQL.
.NET Framework	Microsoft .NET Framework 4.5 or Higher.
SharePoint	SharePoint 2010 or Higher. Cloud based SharePoint such as Office 365 are also supported.

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3. Installation

Team Helpdesk System consists of two separate installs – **Managerial** and **Agent**. The managerial install is for **helpdesk administrators** who would configure and maintain the Team Helpdesk folders, drop down lists, templates, FAQs and other helpdesk settings. Whereas, the Agent install is for the **technicians** to enable them to work on support cases in Outlook with the configured Team Helpdesk folders.

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

Download link: SETUPS

There are two different setup types:

For **'Per User Installation'** (ideal for standalone single user/workstation)
TeamHelpdeskSPSetups_x86.zip (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamHelpdeskSPSetups_x64.zip (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

For **'Per Machine Installation'** (ideal for installing on Citrix and Terminal Servers)
TeamHelpdeskSPSetups_x86_Citrix.zip (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamHelpdeskSPSetups_x64_Citrix.zip (*for 64-bit Outlook 2010, 2013, 2016,2019*)

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

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

Per User Installation and **Per Machine Installation**

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

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

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

For Per User Installation:
TeamHelpdeskSPManagerSetup_x86.exe (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
TeamHelpdeskSPManagerSetup_x64.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

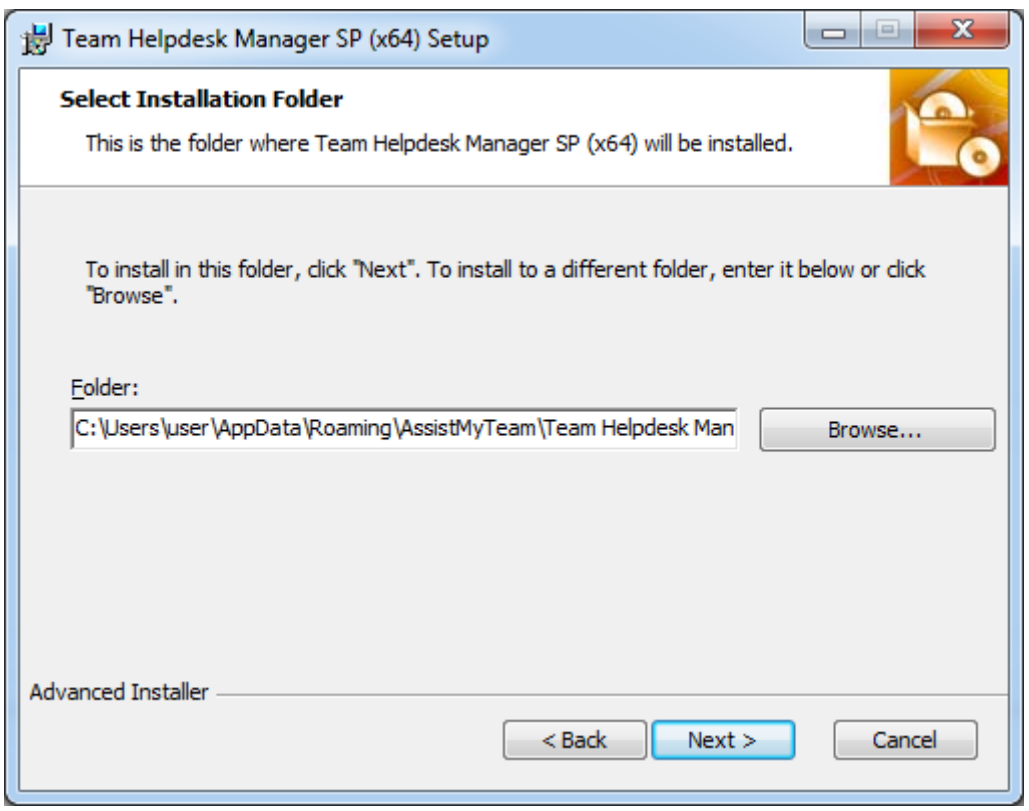
For Per Machine Installation:
TeamHelpdeskSPManagerSetup_x86_Citrix.exe (*for 32-bit Outlook 2010, 2013, 2016, 2019*)
TeamHelpdeskSPManagerSetup_x64_Citrix.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

Managerial Installation

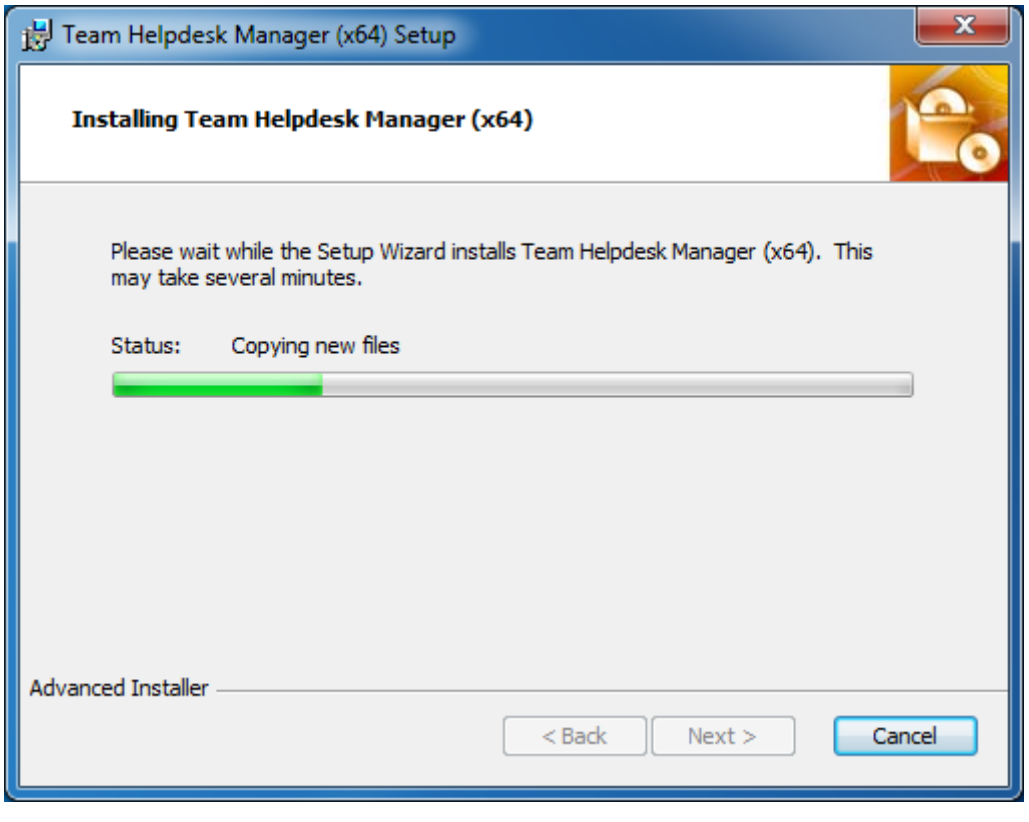
The managerial installation consists of server tools and files, for creating the Team Helpdesk Outlook folders, and for configuring and maintaining the settings of the helpdesk. It has to be performed by the helpdesk administrator/manager before the client tool is installed on every technician's system.

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

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

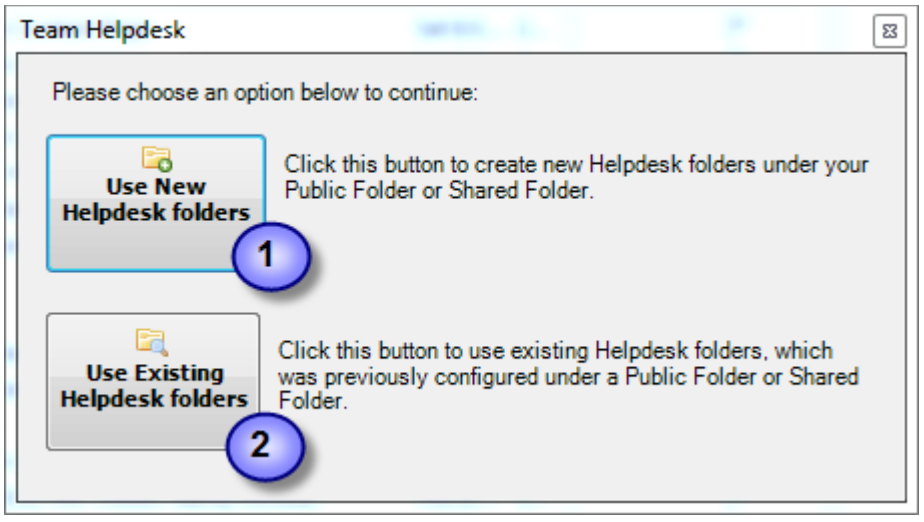


Step 3. Click **'Next'** to continue with the files extraction. It just takes a few minutes to complete the whole copying process



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

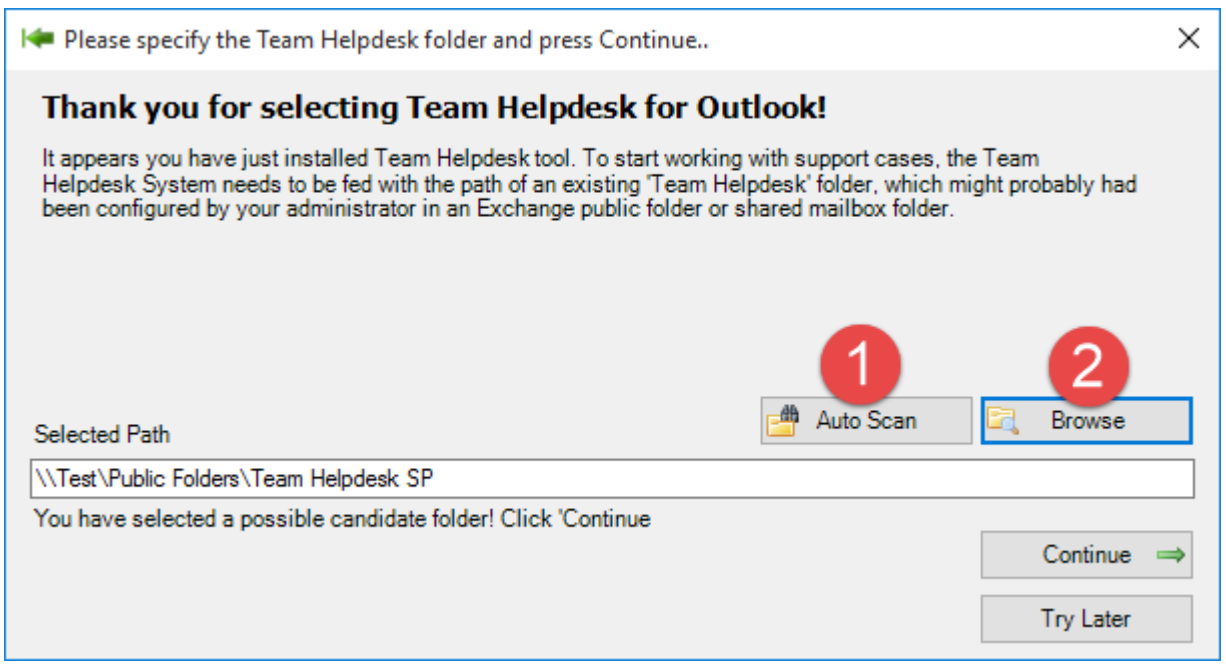
Step 5. Start Outlook (restart if it was already running during the files installation). As soon as Outlook is loaded, you will be prompted with the following dialog box, offering you two choices:



1 **Create New Team Helpdesk folders** – Click this button to create new Team Helpdesk folders (*i.e., Ongoing Cases, Resolved Cases, KB, Schedules, History and Settings*) which are customized with Team Helpdesk specific fields, views and forms. Follow step 6 to further go ahead with the configuration.

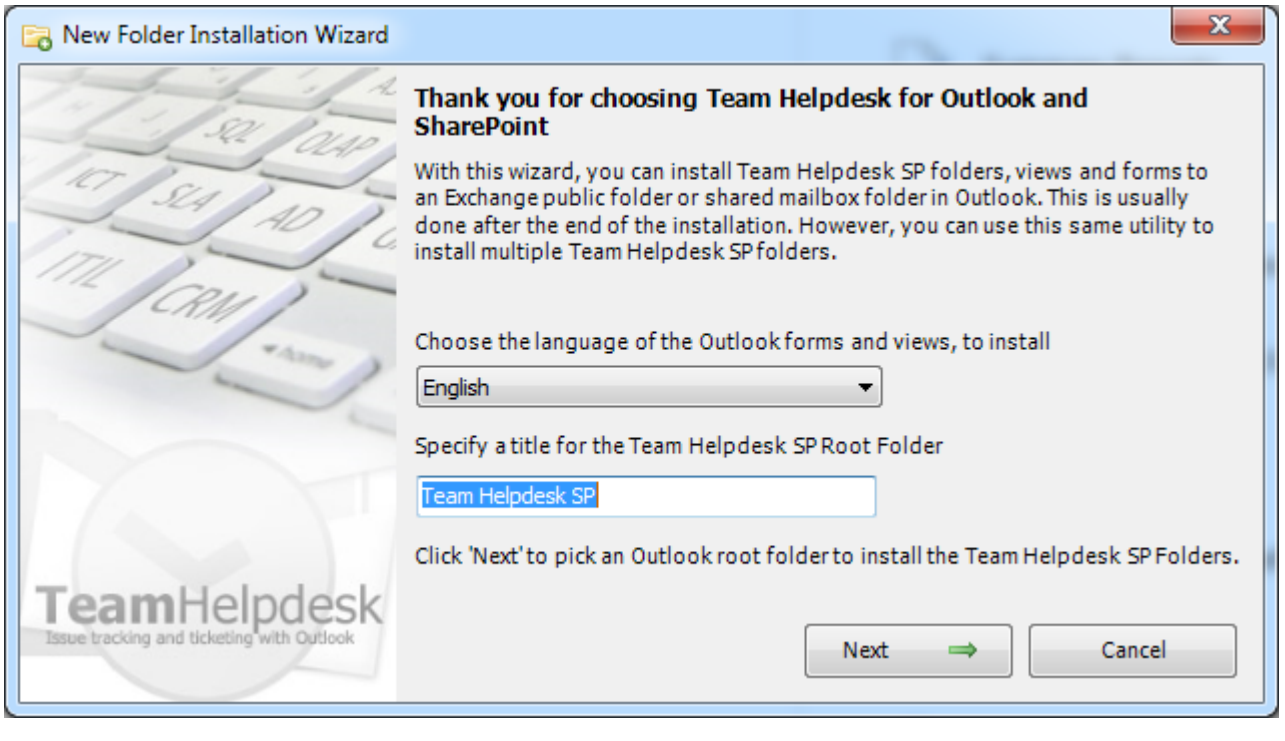
2 **Use Existing Team Helpdesk folders** – Click this button to use existing Team Helpdesk folders (*i.e., Ongoing Cases, Resolved Cases, KB, Schedules, History and Settings*) which had been already configured by another helpdesk manager/administrator.

You will be given the option to select the existing Team Helpdesk root folder, to link up the Team Helpdesk Manager add-in with the existing Team Helpdesk folders and database.



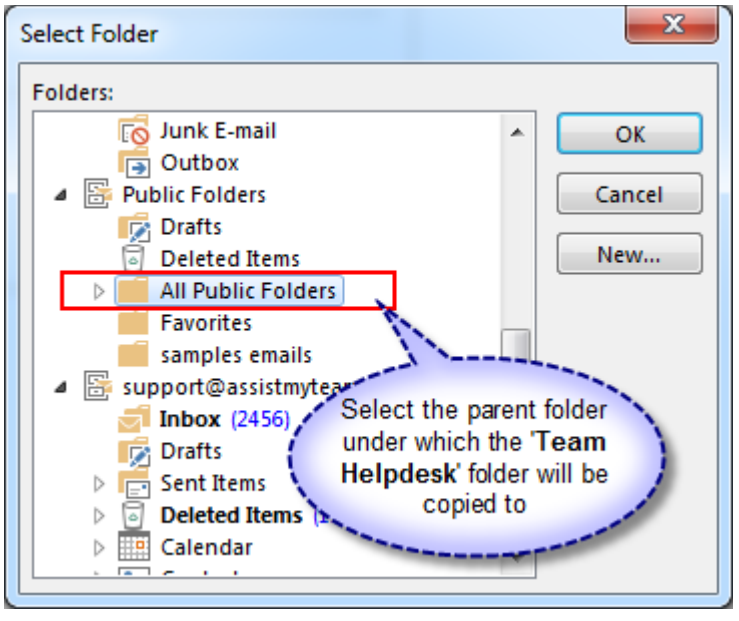
Either you can auto scan 1 to search for the first available Team Helpdesk folder. If you already know the location of the existing Team Helpdesk folders, you can simply click the '**Browse**' 2 button to specify it from your Outlook and then click '**Continue**'. Steps 6 and 7 would are not applicable, with this route.

Step 6. A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent Team Helpdesk folder that will be created. By default, it has a title of **'Team Helpdesk SP**'.

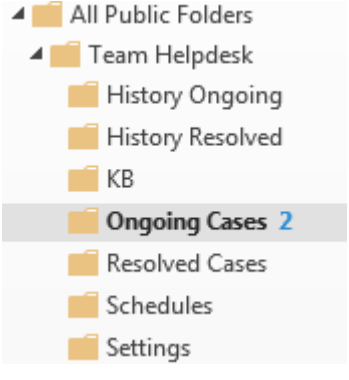


Further, you can choose the language specific Outlook forms and Views to install. The following languages are supported: *English, Español, Norwegian, Danish, Dutch, Deutsch, French, Finnish, Swedish, Portuguese.*

Step 7. Clicking **'Next'** button would enable you to select an Outlook parent folder where the specified Team Helpdesk root folder would be created. Hence make sure you have adequate rights over the selected folder to create a new folder.



The tool would then copy Team Helpdesk subfolders, forms & designs, views etc. from the Team Helpdesk PST template file. It would look like the followings layout:



NOTE: When you start Outlook, if you are not prompted for the option to copy a new Team Helpdesk folder, or choose existing one, then most likely, there might be remnants of earlier installation. In such scenario, go to **Outlook > Team Helpdesk Manager SP** menu and click '**Copy a New Team Helpdesk folder**'. That will manually invoke the wizard tool for copying a new Team Helpdesk folder to your Outlook

Step 8. Now, the final step is to choose a Team Helpdesk database where all the settings, templates and other helpdesk data will be saved. Supported database options are:

i) **Microsoft Exchange/Outlook**

ii) **Microsoft Access**

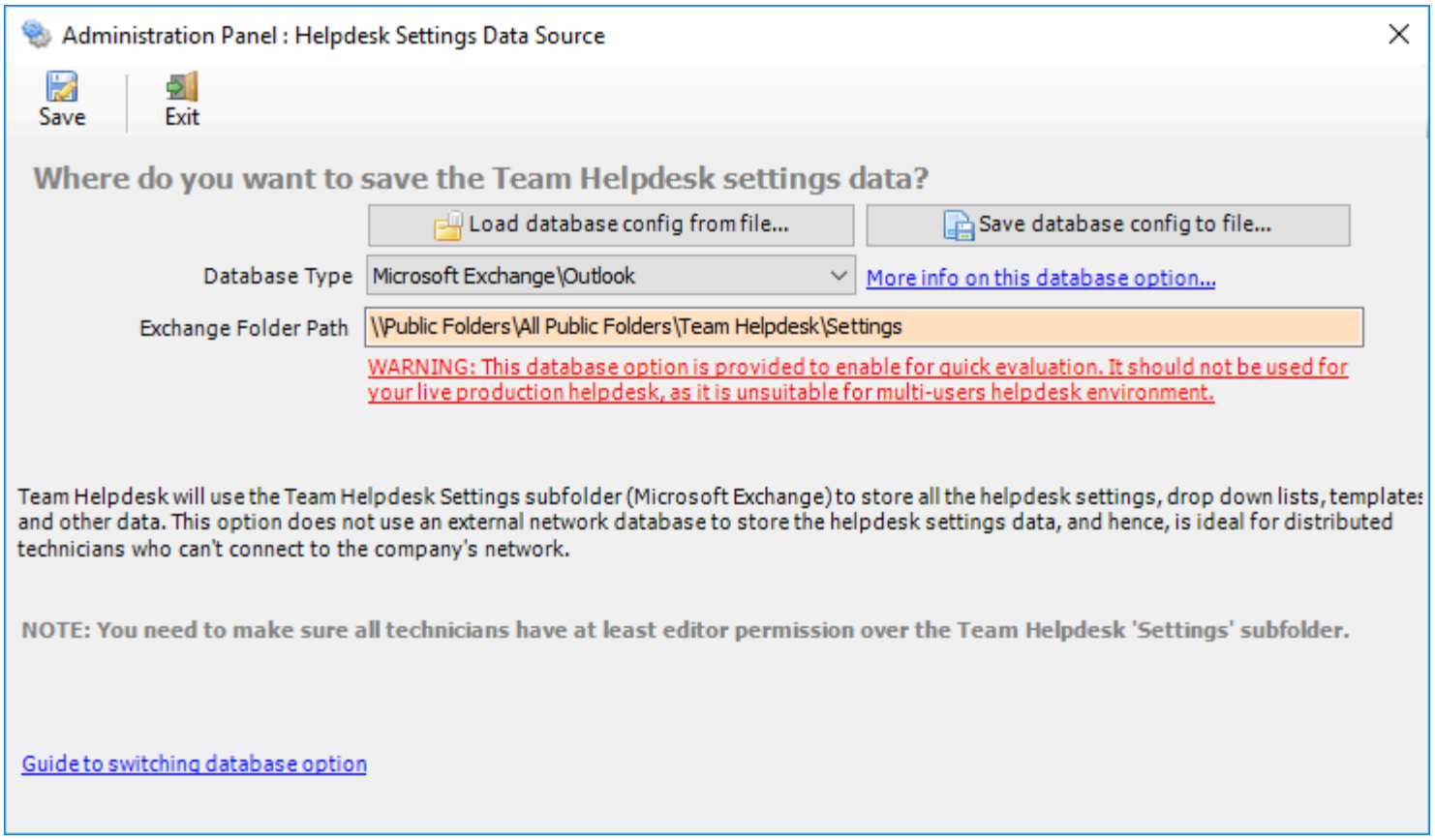
iii) **Microsoft SQL Server**

iv) **Microsoft Azure SQL**

v) **Microsoft SharePoint**

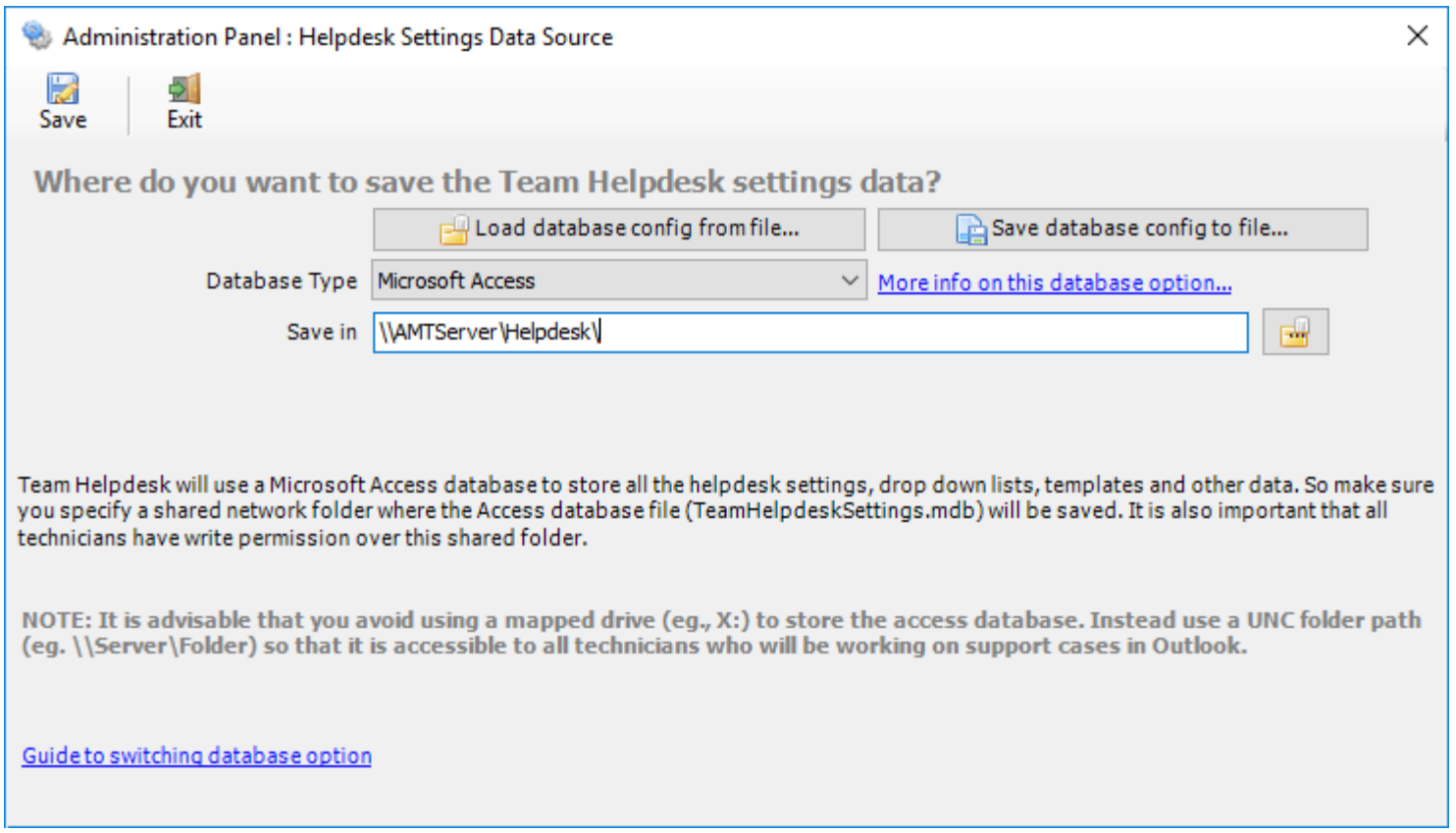
i) Microsoft Exchange/Outlook

If Microsoft Exchange is selected, the settings data will be stored under the Team Helpdesk Settings public folder in Exchange. This option removes the dependency of an external database and works even on WAN and HTTP connection to Exchange. This database option is best used for quickly evaluating Team Helpdesk in your environment without needing to configure a dedicated database. However, please be careful to not use this database option for your live production helpdesk, as it is unsuitable for multi-users helpdesk environment.



ii) Microsoft Access

If you choose Access, the database will need to be placed on a shared network folder such that all technicians working on the support cases in Outlook have access to the network folder. When you specify the location where the MDB file is to be created, make sure you choose a UNC path (e.g. *\\AMTServer\Helpdesk\)* instead of a mapped one because, a mapped drive might only be accessible to you.

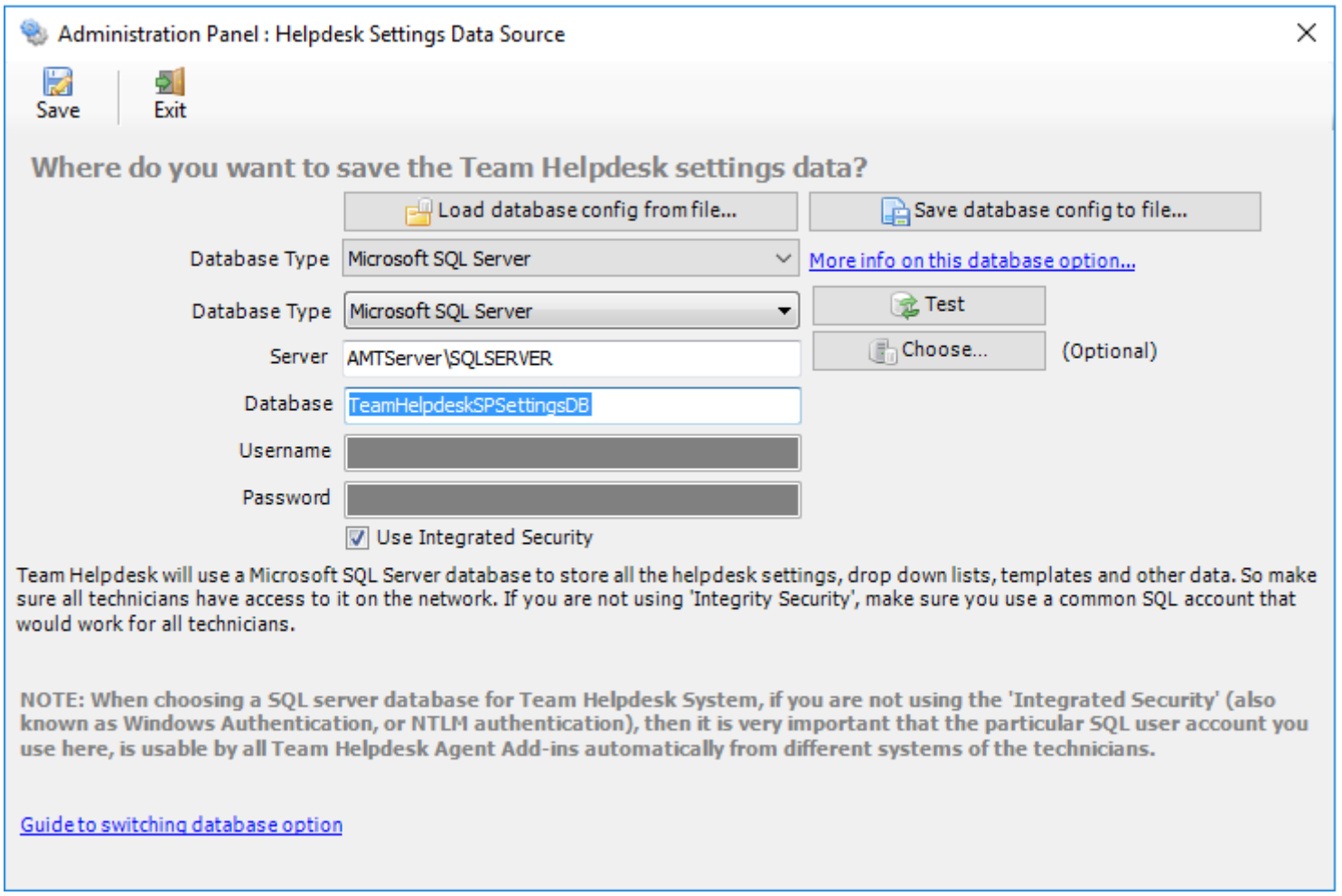


When using a network Access or SQL Server database, it is important that it is configured in a way that it is accessible on the network by all support staffs. Note that, Team Helpdesk with a dedicated database only works on local network. This database option is ideal for a helpdesk team that has a large number of technicians.

NOTE: One important consideration with having a network Access database is the write permission on the folder and the MDB file itself. Make sure, the shared folder or the MDB file is not configured 'read-only' for all technicians on the network, otherwise, technicians won't be able to create and save cases in the Team Helpdesk Cases folders in Outlook.

iii) Microsoft SQL Server

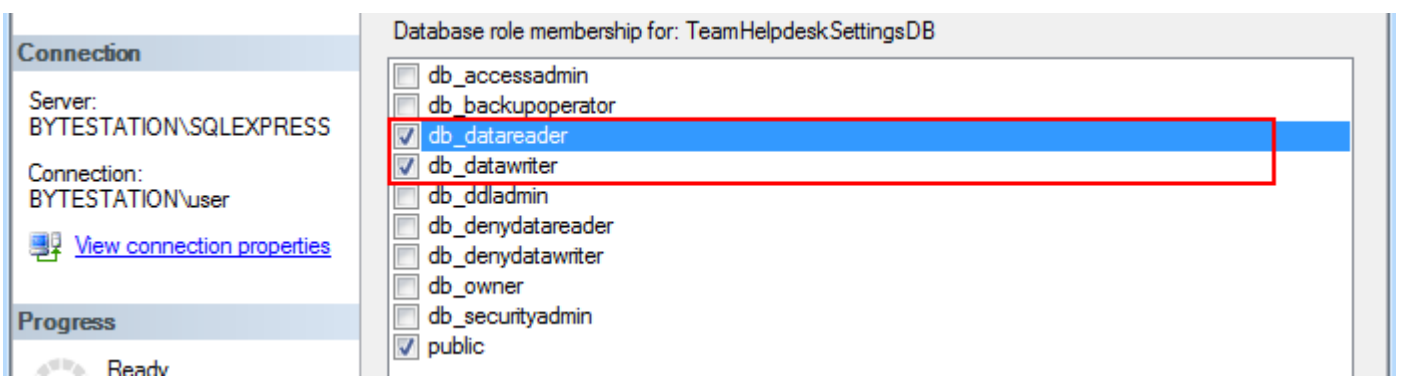
It is recommended to use a dedicated SQL Server database option, if you have a high number of users/technicians working on support cases, as it gives a better performance and is easily scalable.



For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name '**TeamHelpdeskSPSettingsDB**' would be created. If your SQL server is configured to use windows authentication (NTLM), then you can check the 'Use Integrity Security' option to let Windows manager the credentials to access the resources on the SQL server. One important aspect to consider when using a SQL server database is the accessibility by other technicians. That is, when other technicians install the Team Helpdesk Agent, they will automatically pick up these SQL server settings to connect to the database, and hence, it is important that the specified SQL server account here (if you are not using Integrated Security, that is) is usable by all the technicians as well.

Permission for Technicians/Agents on the SQL database

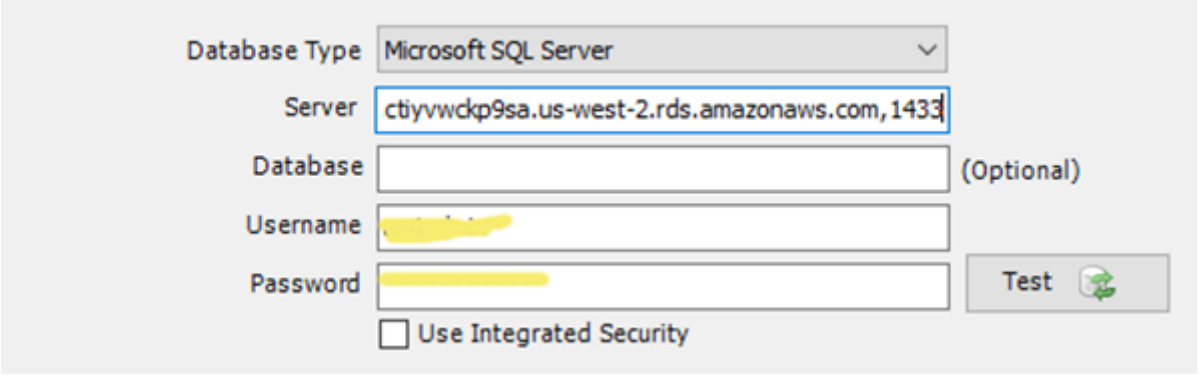
Each of your helpdesk users/technicians should have both **db_datareader** and **db_datawriter** permission on the Team Helpdesk SQL database.



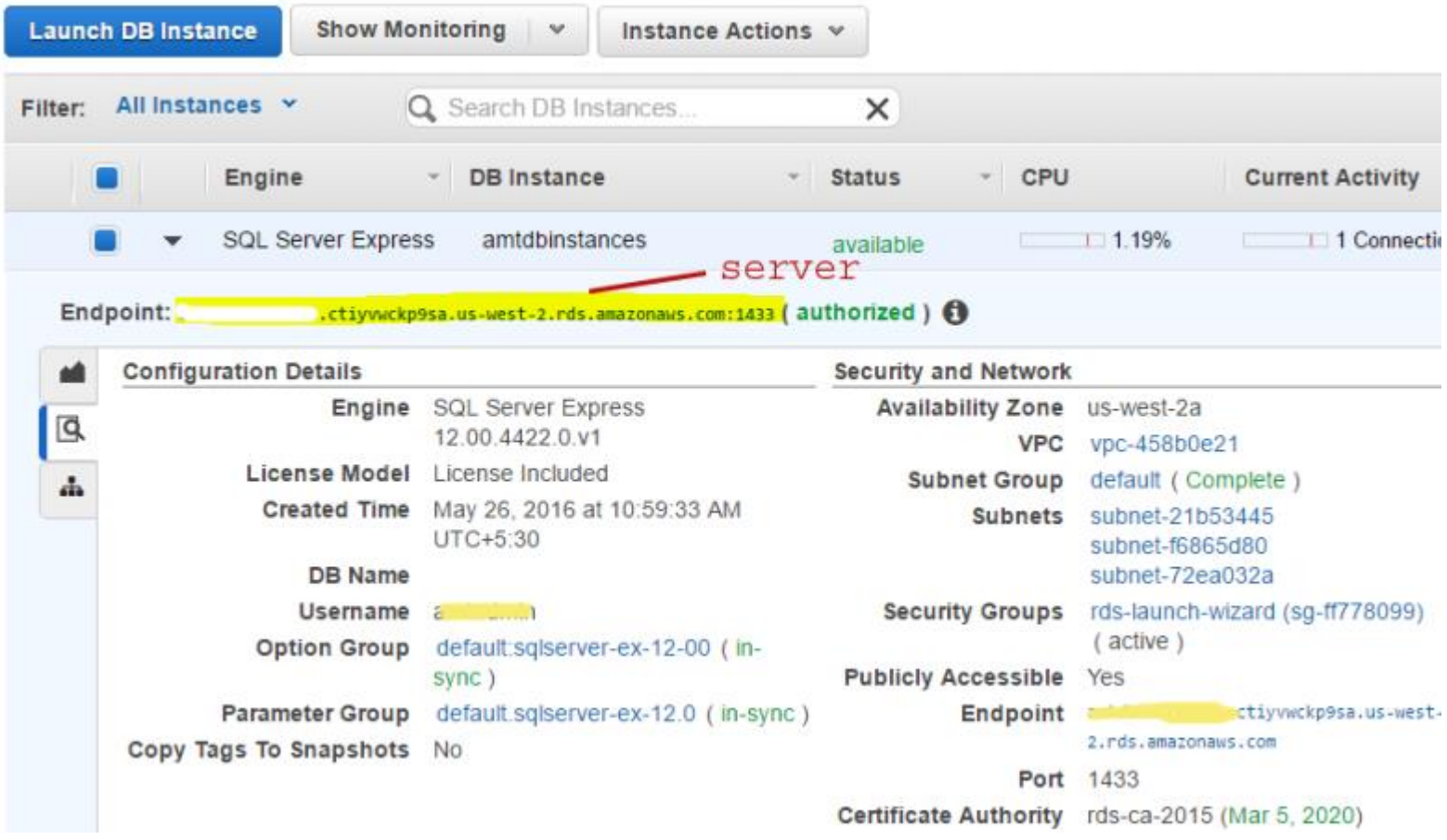
NOTE: When choosing a SQL server database for Team Helpdesk System, if you are not using the 'Integrated Security' (also known as Windows Authentication, or NTLM authentication), then it is very important that the particular SQL user account you use here, is usable by all Team Helpdesk Agents from different systems of the technicians.

Using Cloud based SQL Server database

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

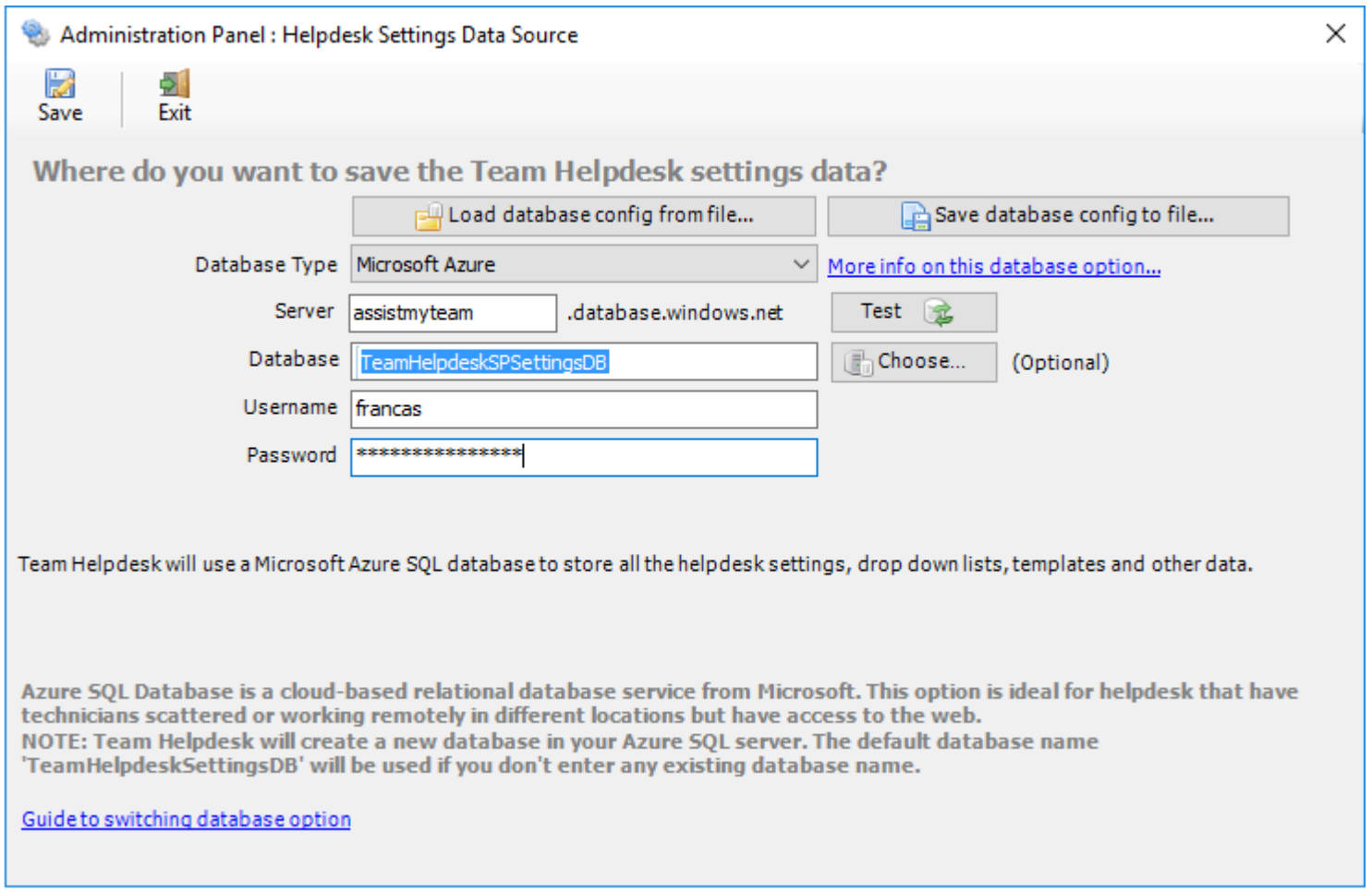


And here is screenshot of the RDS server to use from the RDS member panel.



iv) Microsoft Azure SQL

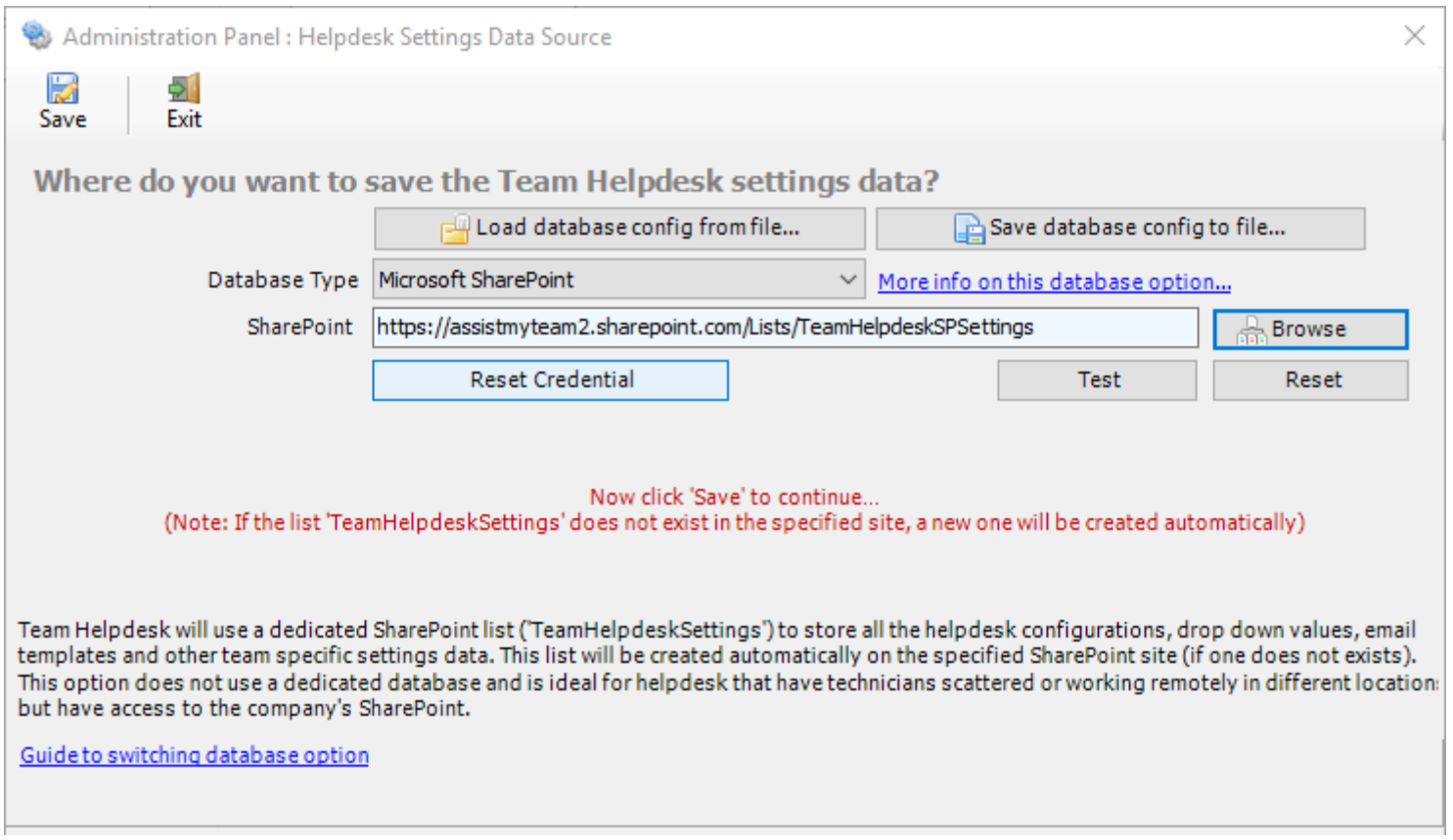
Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for helpdesk that have technicians scattered or working remotely in different locations but have access to the web.



NOTE: If no database name is mentioned, Team Helpdesk will create a new database in your Azure SQL server, by the name of *'TeamHelpdeskSPSettingsDB'*.

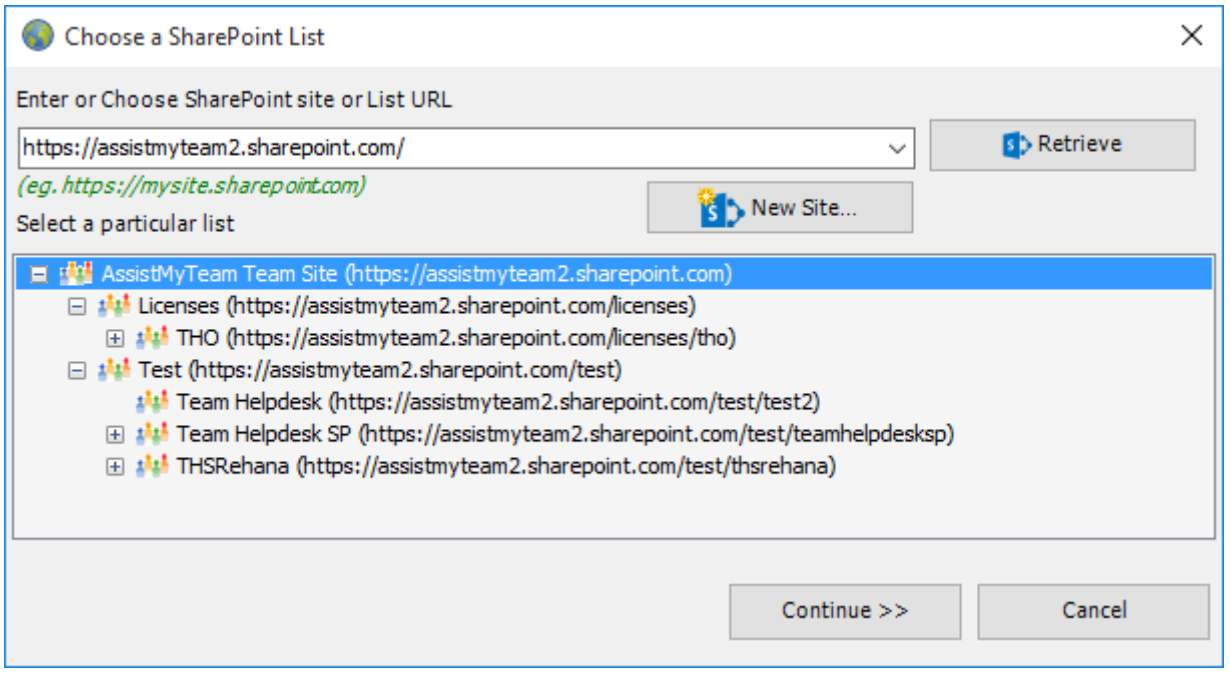
v) Microsoft SharePoint

The last helpdesk database option 'Microsoft SharePoint' allows you to use your SharePoint site to store the helpdesk settings, drop down lists, email templates and other global configurations such that all your technicians can access it from the internet or WAN. This is ideal if many of your technicians' work from remote location with no access to the office network but can access to the company's SharePoint site from outside the office network.



To specify a SharePoint site, click the '**Browse…**' button. This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format *http://mySharePointsite*. And click 'Retrieve' to show all available sub-sites and lists.

Very Important! Your permission to the SharePoint site: Make sure that you have **'Full Control'** permission over the SharePoint site so that Team Helpdesk Manager add-in can create the '*TeamHelpdeskSPSettings*' list automatically.



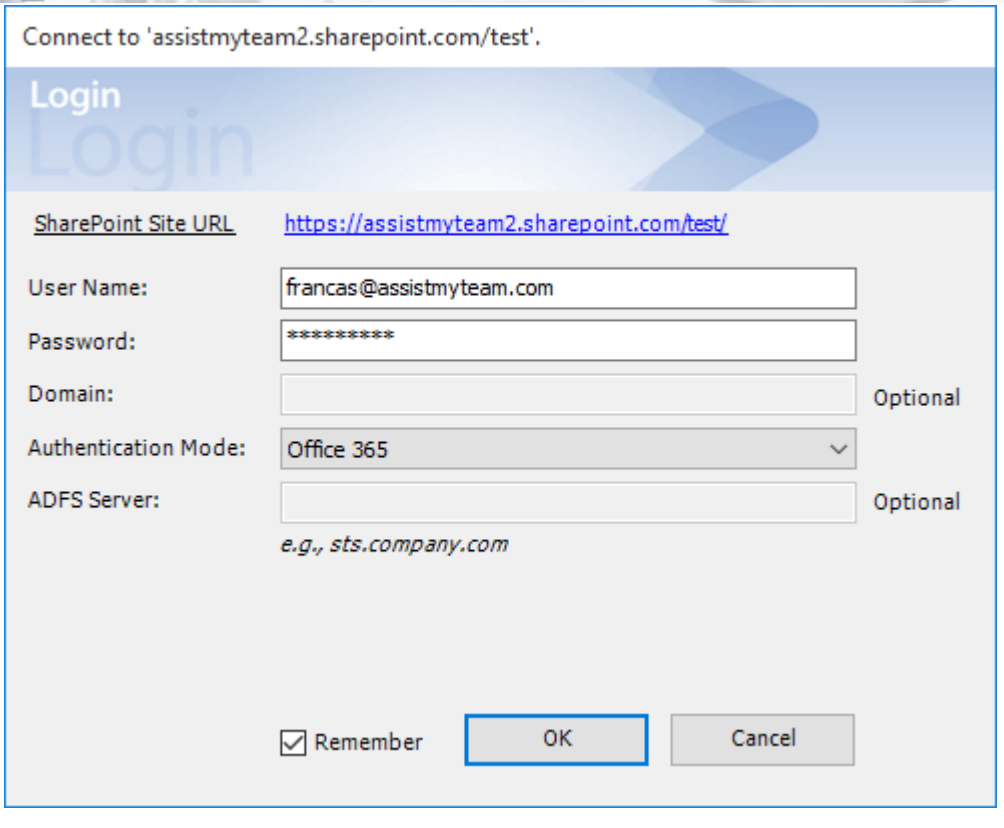
And then select the particular site under which the Helpdesk settings would be stored. You can also choose to create a new sub-site on the fly by clicking the 'New Site...' button and select it. When you click 'Confirm', Team Helpdesk will automatically create and configure a new SharePoint list titled '*TeamHelpdeskSPSettings*' under the site. And then any settings/drop down lists you defined from Team Helpdesk Manager Tool in Outlook would be saved in this repository.

If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint.

However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you (and another individual technician) to enter their credential.

You can also specify the authentication mode that is used by your SharePoint to allow connection to it.

For instance, if your SharePoint is configured for Windows authentication, choose 'NTLM'. If it used a form-based authentication, then choose 'Forms' whereas if it used a claimed based authentication (for Office 365 SharePoint Online), choose 'Office 365'.



In the username, exclude any domain information. For instance, do not enter in the format **DOMAIN\UserName.** Only enter **UserName**. If your SharePoint site login requires a domain name, enter one in the 'Domain' box instead. Check 'Remember' so that Team Helpdesk add-in can use the same credential to logon to the SharePoint site in subsequent connection.

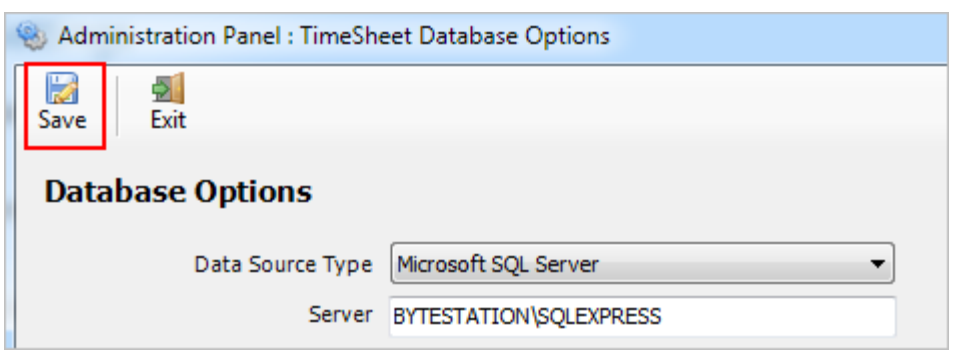
When your technicians with the Team Helpdesk Agent tool starts Outlook, the add-in would automatically connect to the admin specified SharePoint site and would retrieve the helpdesk logic and settings data to the local system.

What SharePoint permissions are required for other technicians?

All technicians should have at least '**Contribute**' permission the SharePoint list '*TeamHelpdeskSPSettings*'.

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

Step 9. Once you click '**Save'**, the manager tool will automatically create the chosen database (if it does not exist already). And then any project metadata and other settings/drop down lists you defined from Team Helpdesk Manager add-in in Outlook would be saved in this repository.

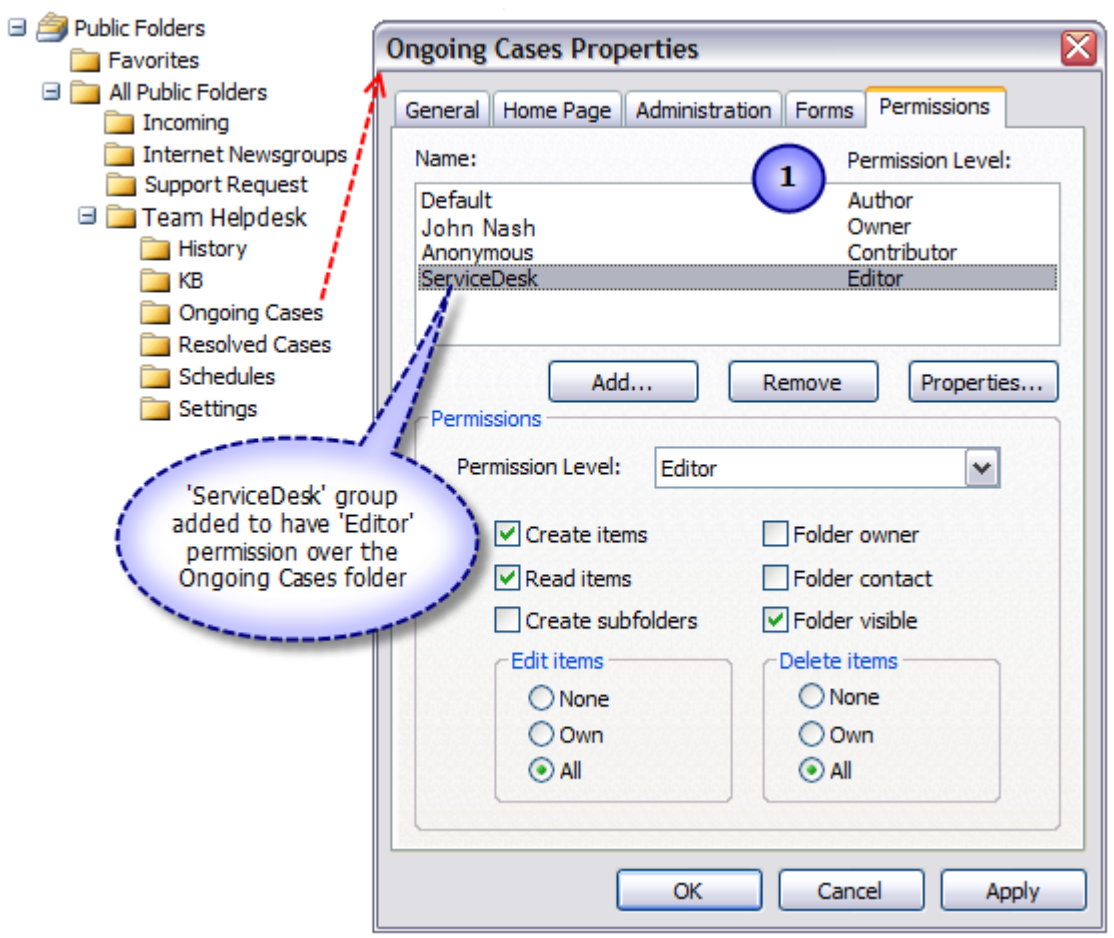


Now that you have installed - Team Helpdesk files into your system and Team Helpdesk folders into your public folder or mailbox, administrator would need to configure the permission level of each Team Helpdesk folder, namely, the History Ongoing, History Resolved, KB, Ongoing Cases, Resolved Cases, Schedules and Settings.
By default, the permission on each subfolder for all users is set to 'Author'. Only the user (manager) who had performed the installation has got 'Owner' permission. Hence, it is this user (manager) who would need to grant permission to the folders for all members of the helpdesk team. Without a proper permission structure defined, technicians accessing the Team Helpdesk

folders would not be able to perform most of the helpdesk tasks such as creating new support cases, working on their assigned cases etc.

Folder	*Permission*
History Ongoing	At least 'Editor' permission to all helpdesk technicians
History Resolved	At least 'Editor' permission to all helpdesk technicians
KB	At least 'Author' permission to all helpdesk technicians
Ongoing Cases	At least 'Editor' permission to all helpdesk technicians
Resolved Cases	At least 'Editor' permission to all helpdesk technicians
Schedules	At least 'Editor' permission to all helpdesk technicians 'Publishing Editor' permission to technicians with admin-access*
Settings	At least 'Editor' permission to all helpdesk technicians

We recommend that a user's group consisting of all agents/technicians of the helpdesk be created such that helpdesk manager (owner) can easily assign permission to the group as a whole, instead of undergoing multiple steps of selecting and granting the same permission to each technician. In the example below, a group *'ServiceDesk'* comprising of all helpdesk users is granted editor permission over the 'Ongoing Cases' folder.

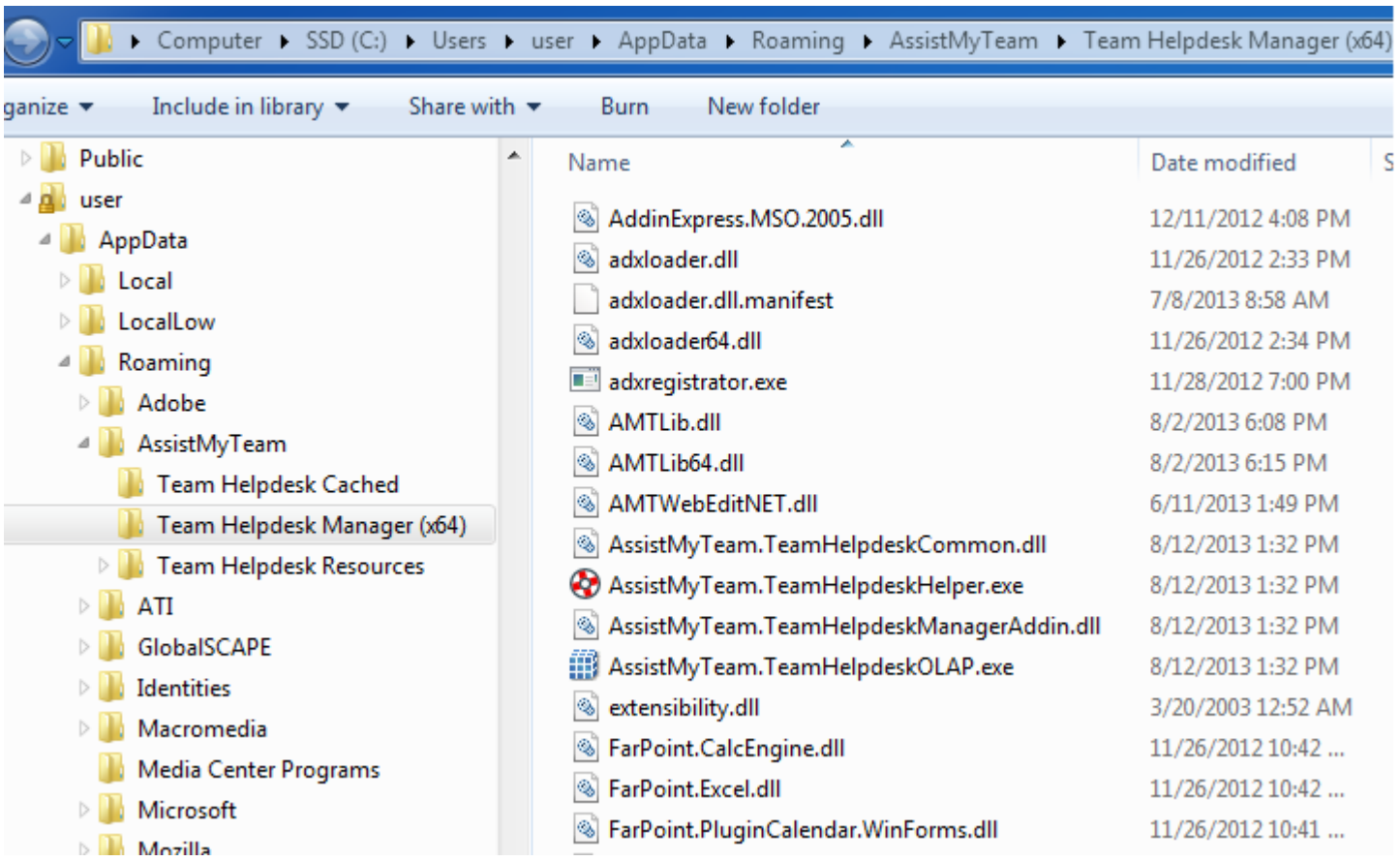


The screenshot below lists all the files that are installed on the system. Notice, that, there are additional files which forms the managerial option pack - tools to configure and install a new Team Helpdesk folder, which has to be performed only by the helpdesk administrator/manager.

Add-in files under current user's application data folder:

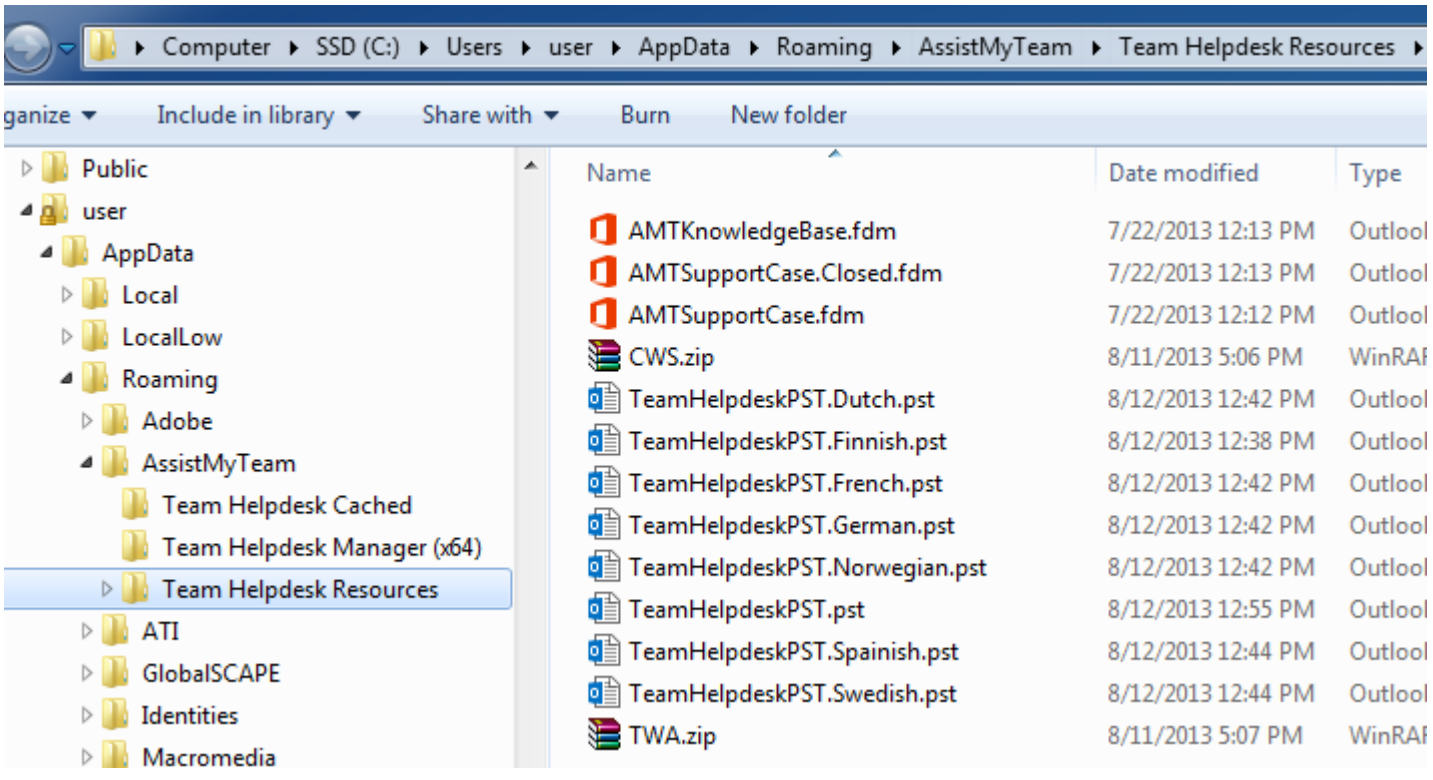
E.g. *C:\Users\[USER]\AppData\Roaming\AssistMyTeam\Team Helpdesk Manager SP (x64 or x86)* if it is 'Per User Installation'.

For 'Per Machine Installation', it would be *C:\Program files (x86)\AssistMyTeam\Team Helpdesk Manager SP (x86 or x64)*



Template PSTs/Forms/Web Access files under current user's application data folder:

E.g. C:\Users\[USER]\AppData\Roaming\AssistMyTeam\Team Helpdesk Resources SP

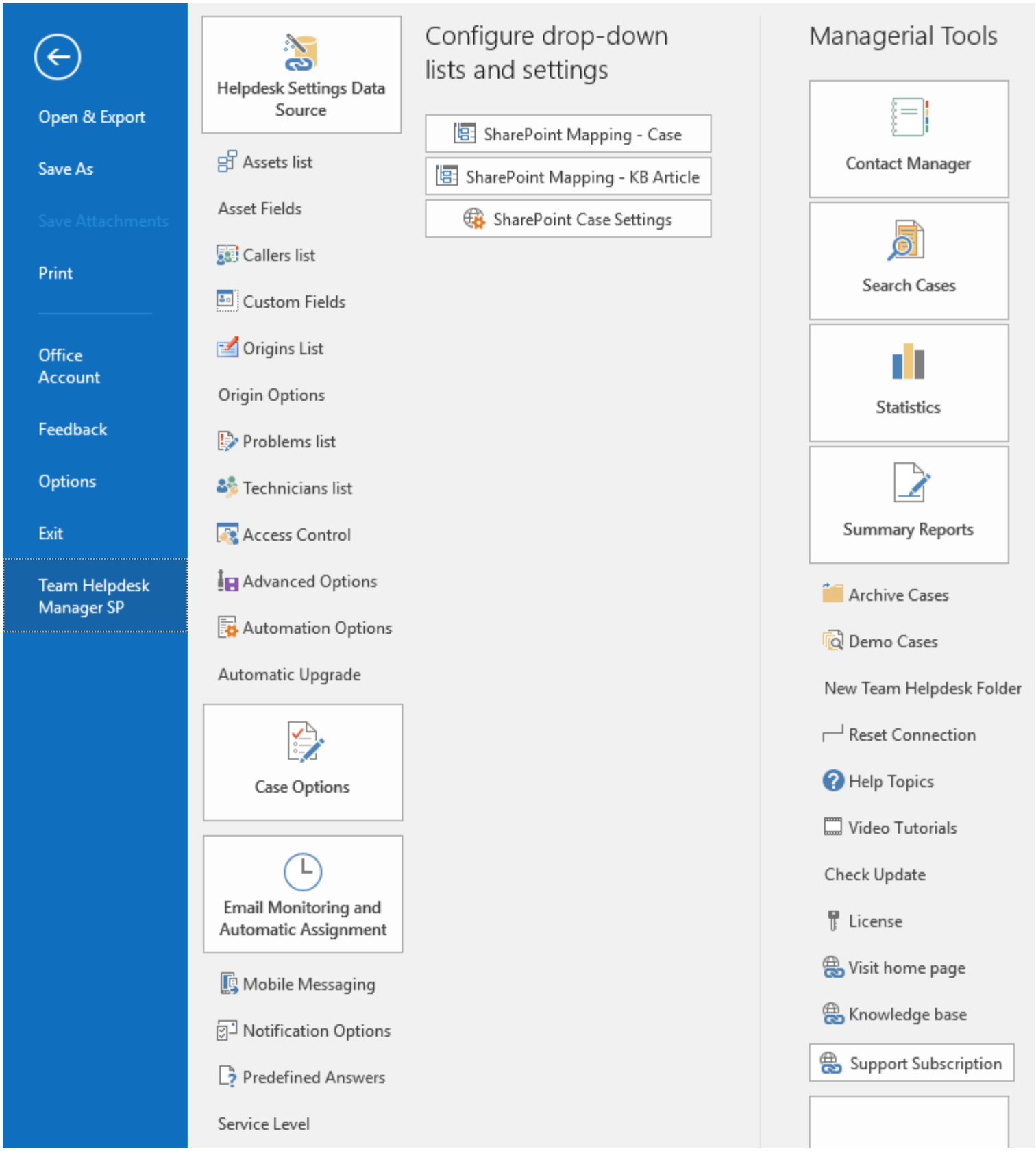


4. Managerial Settings

The Team Helpdesk Manager include list managers to customize the contents of all drop-down boxes on the help desk form, predefined answers, templates for outgoing emails and SMS, notification options, incoming emails monitoring, messaging, custom fields etc. Besides managing the settings and drop-down lists, it is responsible for monitoring email folders and mailboxes for automatic processing of incoming emails to support cases, as well as processing web requests coming from Technician Web Access (TWA) and Customer Web Service (CWS) websites.

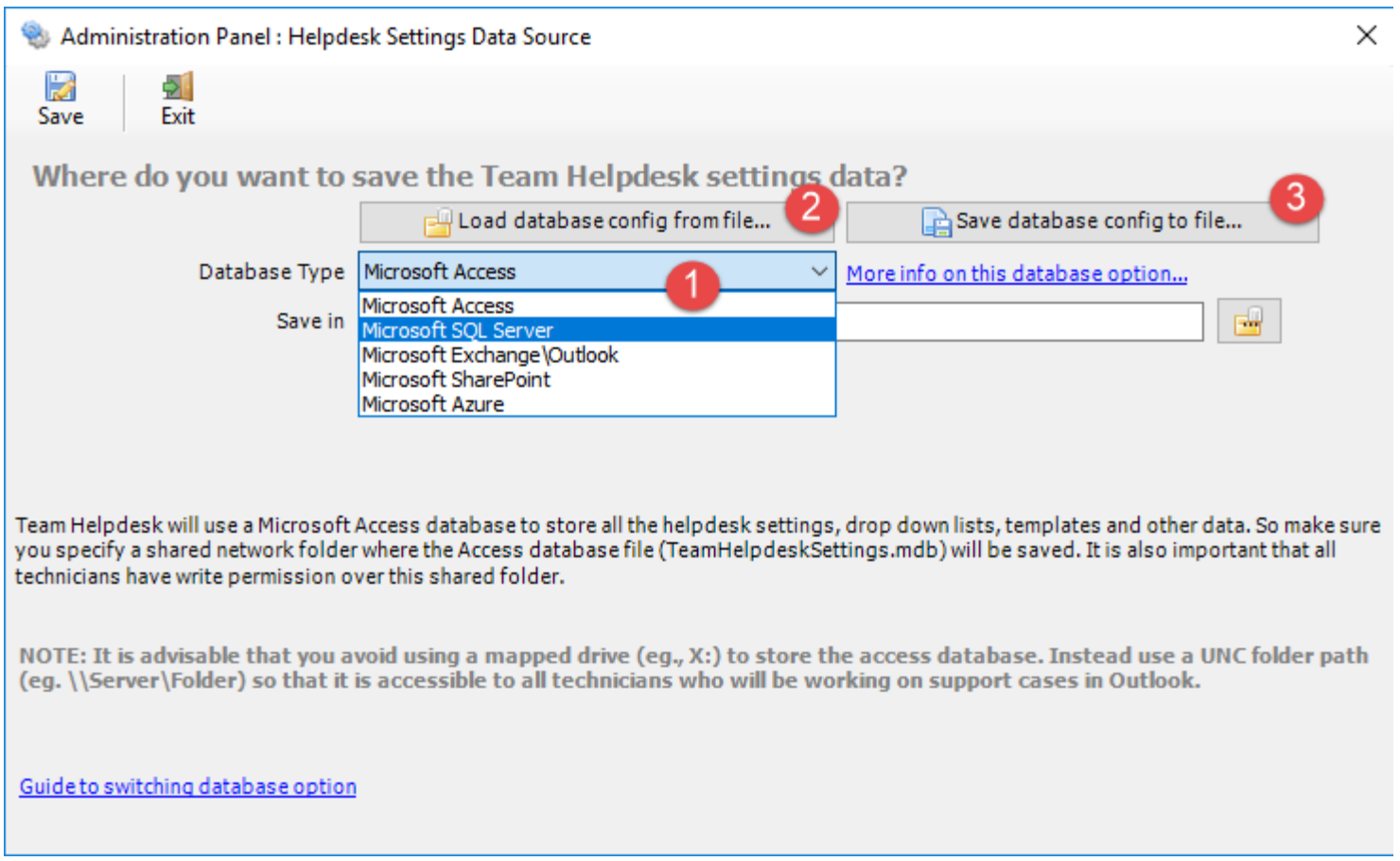
Team Helpdesk Manager Menu

The Team Helpdesk menu serves as the gateway for launching most of the functionalities and tools available in Team Helpdesk for Outlook. In Outlook 2016, you would find the Team Helpdesk Manager menu in the backstage file button, as shown below.



4.1 Helpdesk Settings Data Source

Being a groupware solution, Team Helpdesk add-in requires that it stores the settings, templates and other helpdesk data on a dedicated database, which is accessible to all the technicians of your helpdesk. When you install the managerial tool first time, you will be prompted to choose a database to be used for Team Helpdesk settings.



1 Supported database options:

i) **Microsoft Exchange/Outlook**
If Microsoft Exchange is selected, the settings data will be stored under the Team Helpdesk Settings public folder in Exchange. This option removes the dependency of an external database and works even on WAN and HTTP connection to Exchange. This database option is best used for quickly evaluating Team Helpdesk in your environment without needing to configure a dedicated database. However, please be careful to not use this database option for your live production helpdesk, as it is unsuitable for multi-users helpdesk environment. For more information, refer to section 'Installation > Exchange/Outlook database'.

ii) **Microsoft Access**
If you choose Access, the database will need to be placed on a shared network folder such that all technicians working on the support cases in Outlook have access to the network folder. For more information on using Access with Team Helpdesk, refer to section 'Installation > Microsoft Access database'.

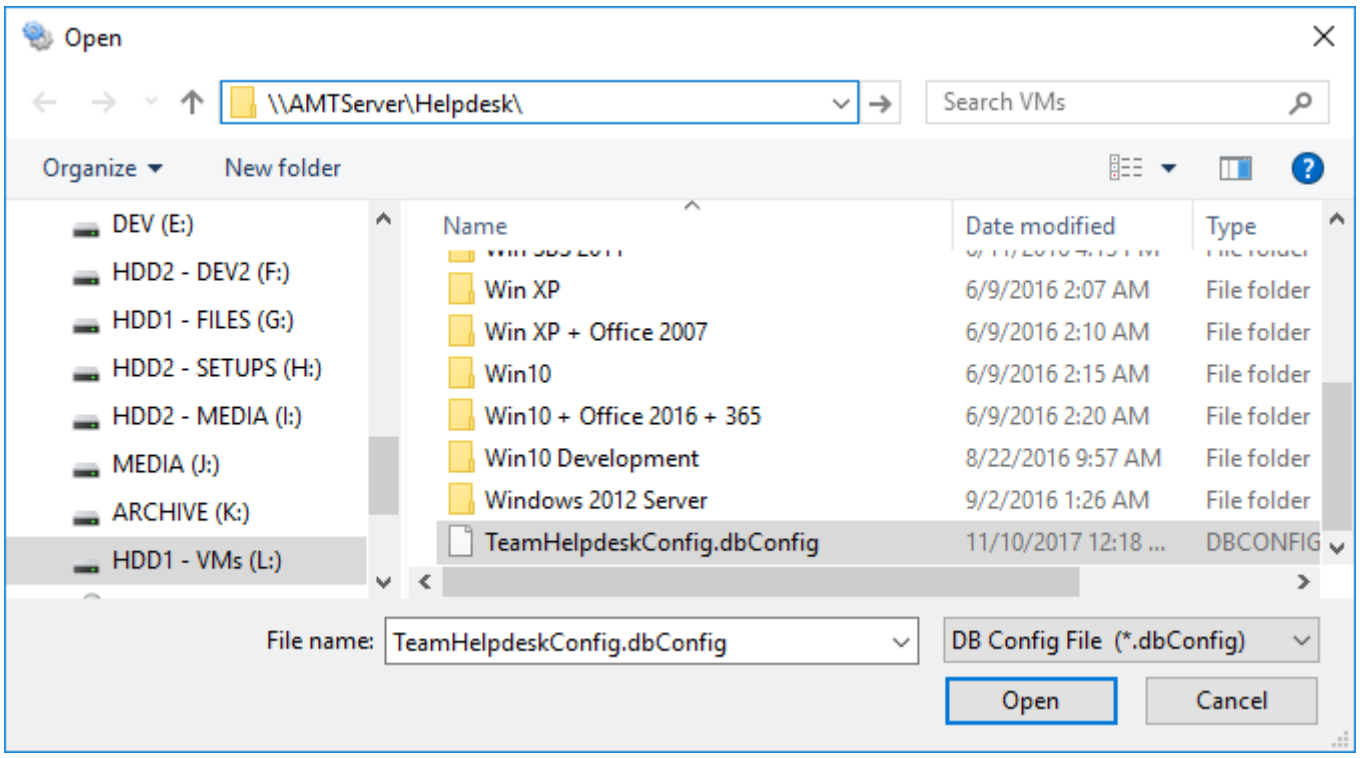
iii) **Microsoft SQL Server**
It is recommended to use a dedicated SQL Server database option, if you have a high number of users/technicians working on support cases, as it gives a better performance and is easily scalable. For more information on using SQL Server with Team Helpdesk, refer to section 'Installation > SQL Server database'.

iv) **Microsoft Azure SQL**
Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for helpdesk that have technicians scattered or working remotely in different locations but have access to the web. For more information on using Azure SQL with Team Helpdesk, refer to section 'Installation > Azure SQL database'.

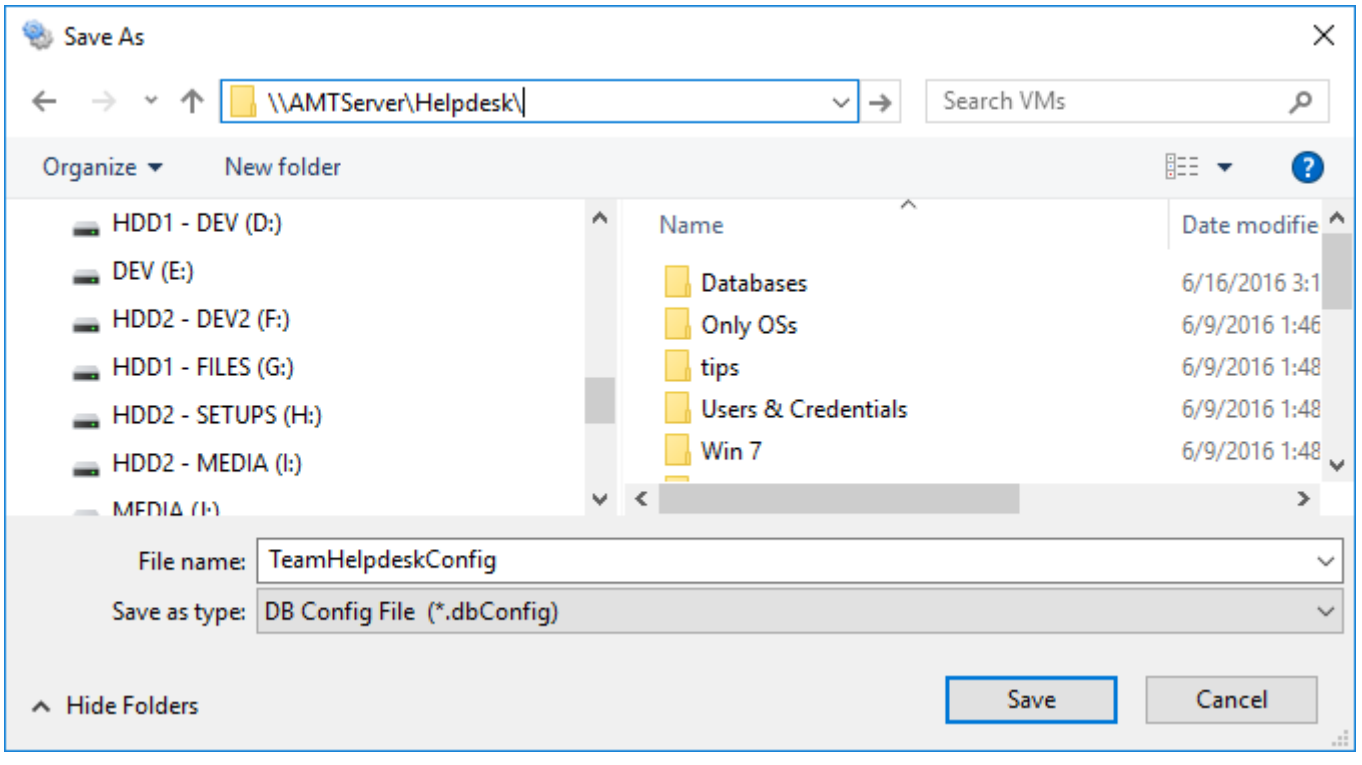
v) **Microsoft SharePoint**
This allows you to store the helpdesk settings, drop down lists, email templates and other global configurations to a SharePoint list such that all your technicians can access it from the internet or WAN. This is ideal if many of your

technicians' work from remote location with no access to the office network but can access to the company's SharePoint site from outside the office network. For more on using SharePoint with Team Helpdesk, refer to section '[Installation > SharePoint database](#)'.

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



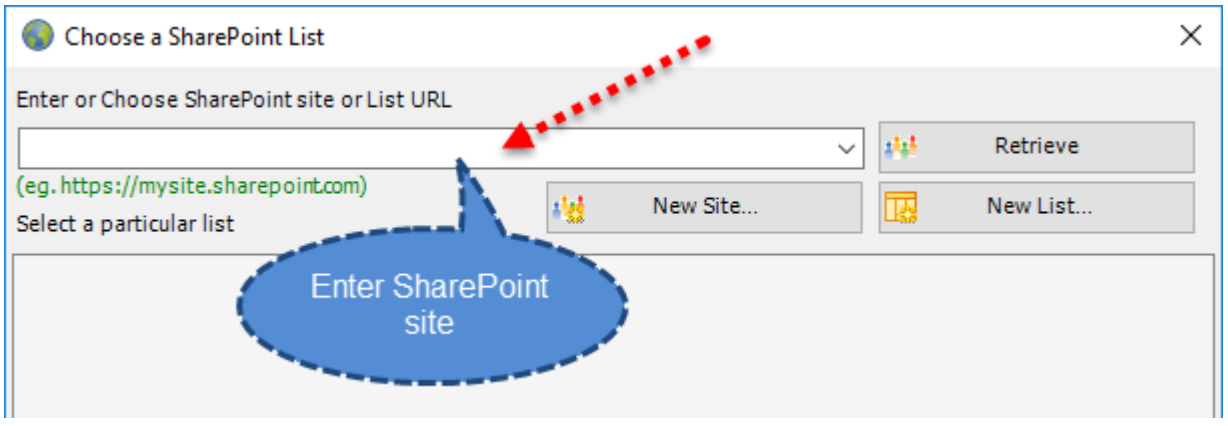
3 Saving database configuration to file: Database configuration can be saved to a file (having *.dbconfig file extension) from Helpdesk Settings Data Source panel and manager can share/deploy this .dbconfig file to other agents/users (say, via email or file server) so that individual technician can import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



4.2 SharePoint Mapping – Support Case

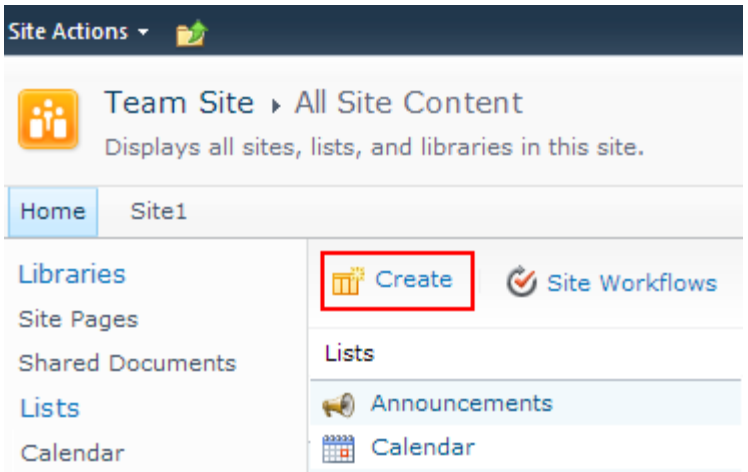
When a support case is generated in Outlook, either manually by the technician, or automatically from an incoming email on a monitored mailbox, as a helpdesk manager, you can choose which Outlook helpdesk fields get included in the SharePoint copy of the case. All you need to do is map the Outlook helpdesk fields with relevant fields of the SharePoint list. Mapped settings are then accessible by all technicians in the helpdesk.

When you try to perform mapping for the support case with SharePoint, you will be prompted to enter the URL of your SharePoint site from which you can choose the particular destination SharePoint list under which copies of the cases raised in Outlook will be synchronized and stored.

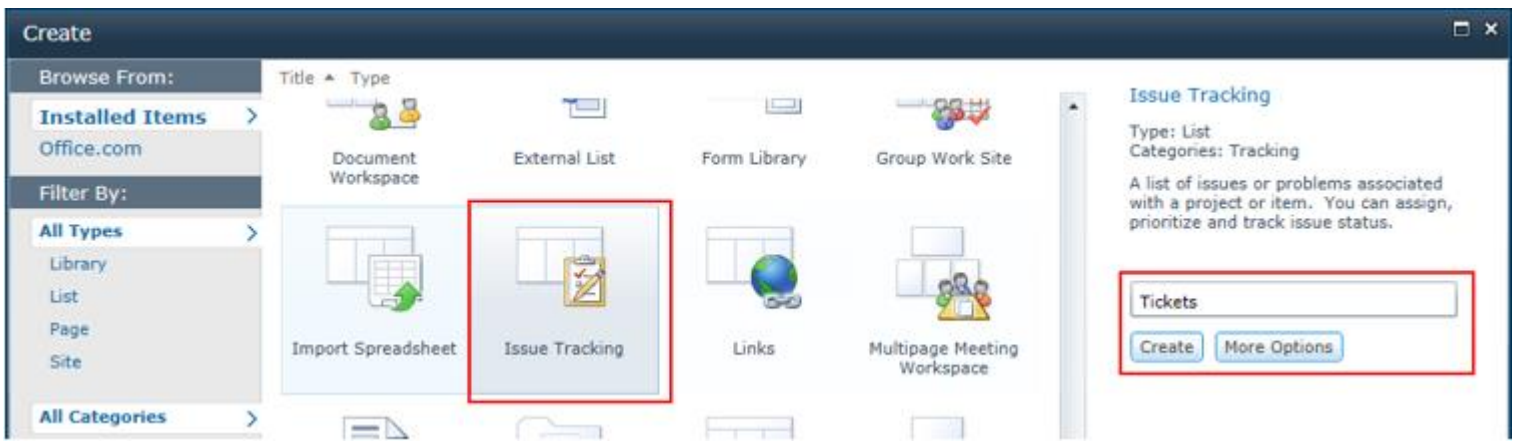


You can re-use existing SharePoint lists or create new one for this purpose. Ideally, we recommend that the SharePoint list you will choose for used with Team Helpdesk was derived from the 'Issue Tracking' template in your SharePoint. This is because such SharePoint list already comes with predefined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

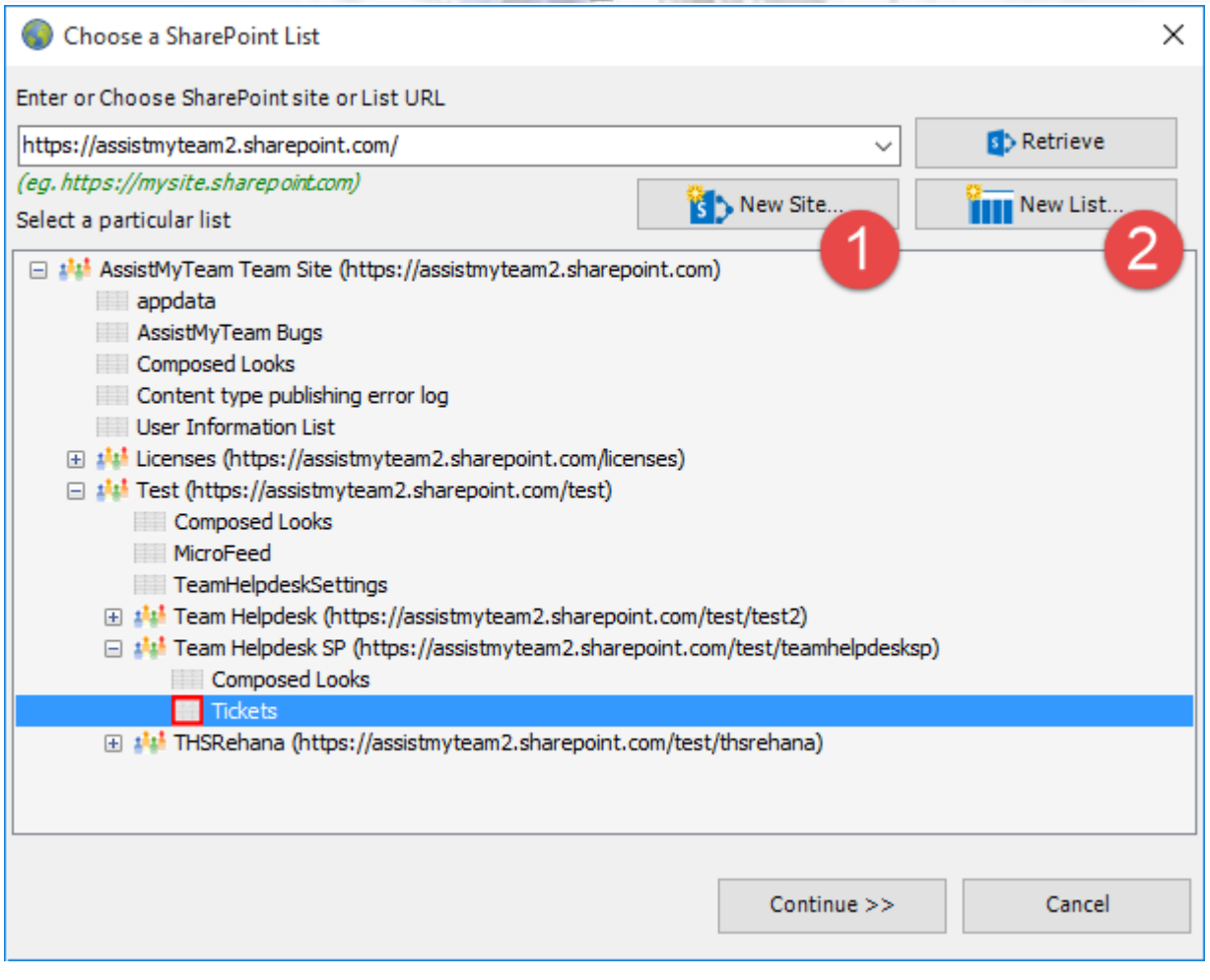
Creating a new SharePoint list in your SharePoint site via web browser



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

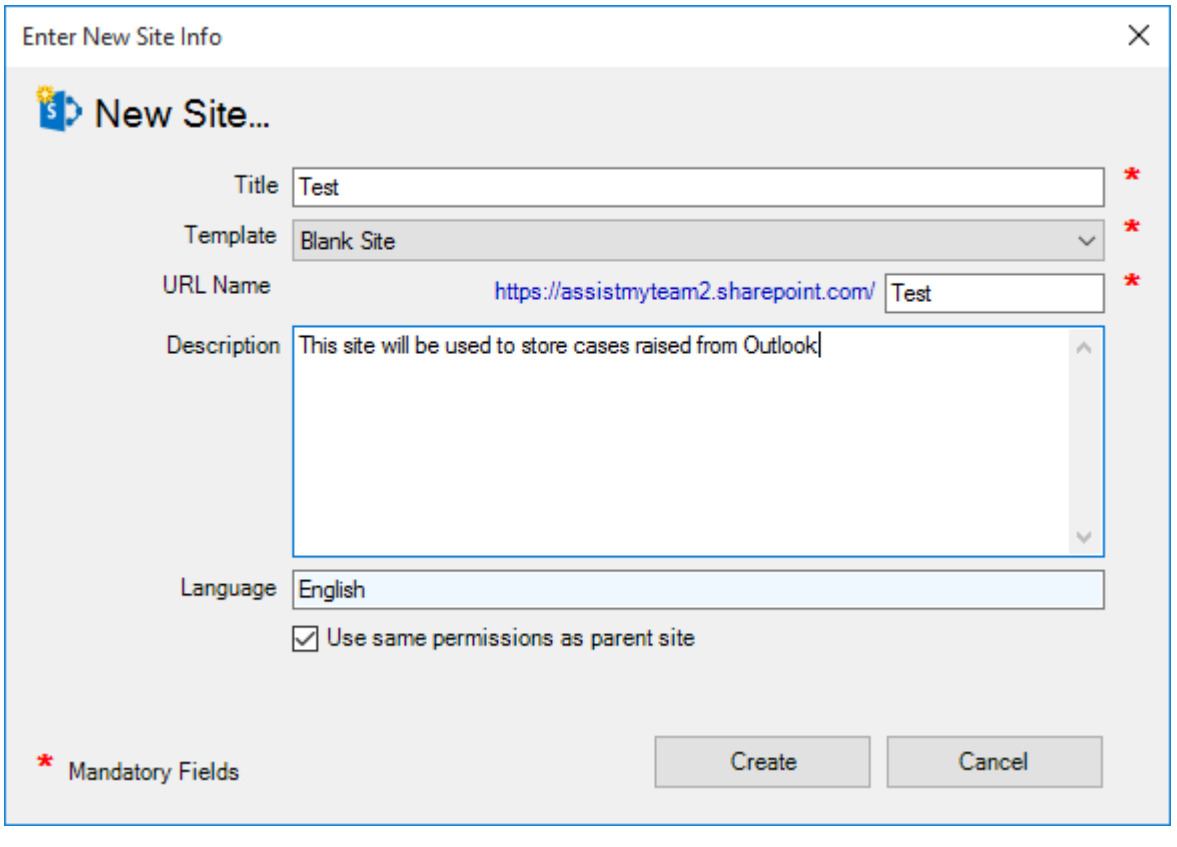


And then choose this newly created SharePoint list (*e.g. Tickets*) or any other existing lists from the mapping tool and click '**Continue**'.

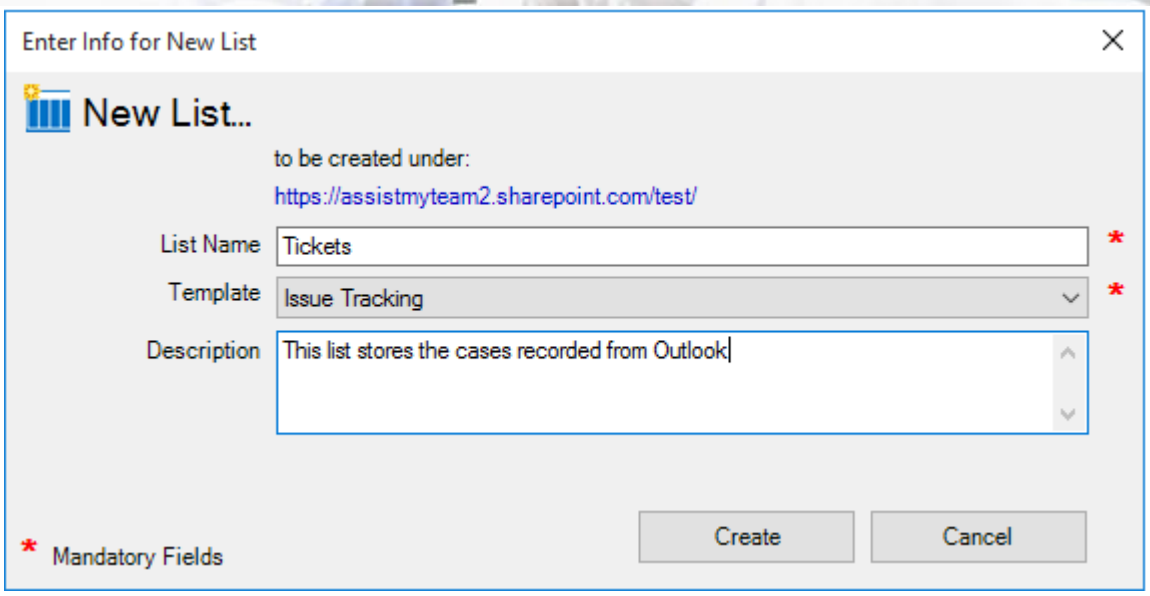


Instead of creating the new site/list in the SharePoint using your web browser, you can also choose to create – new site or list directly from the add-in.

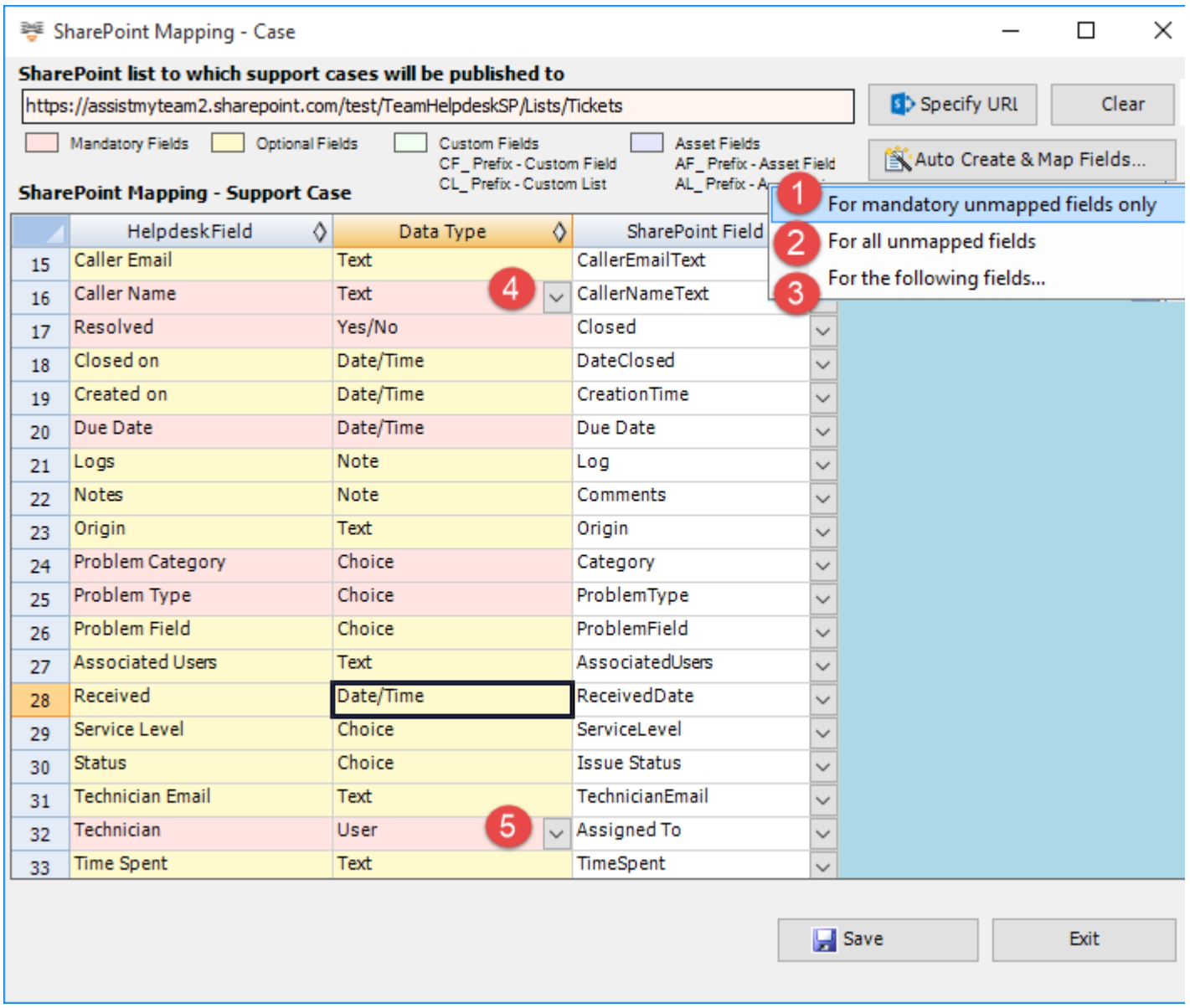
1 **New Site** – Create a new site directly under the chosen parent site to be used exclusively for Team Helpdesk. By default, the site will be created as a blank site, unless a different site template is chosen from the drop down.



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



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



In the mapping dialog box (above), the first column lists all the Helpdesk Outlook fields. The second column displays the data type of the field. In the third 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.

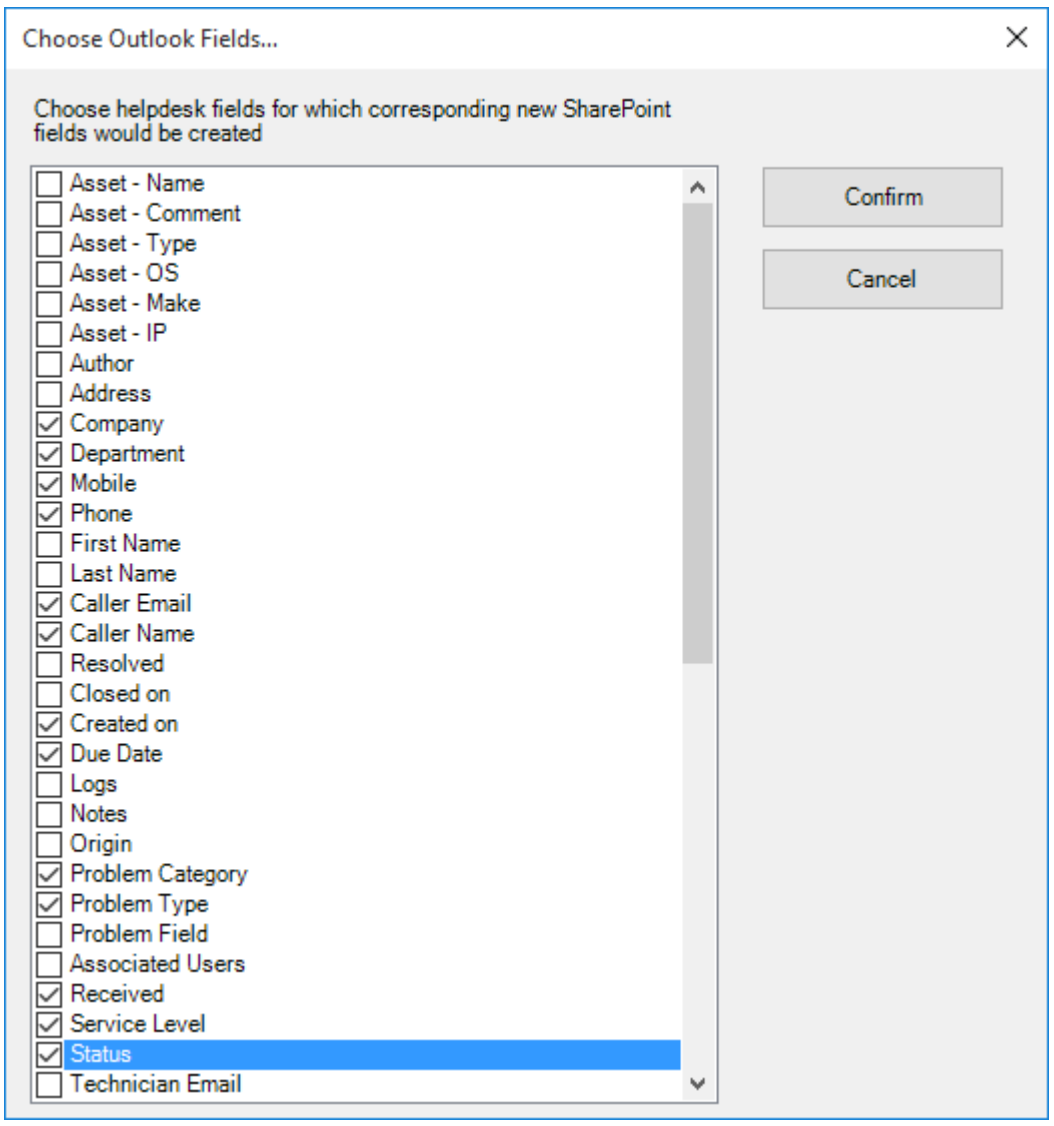
For example, in the screenshot above, Outlook Helpdesk field '**Due Date**' is mapped to SharePoint field '**Due Date**', and Helpdesk field '**Problem Category**' to SharePoint field '**Category**' etc.

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

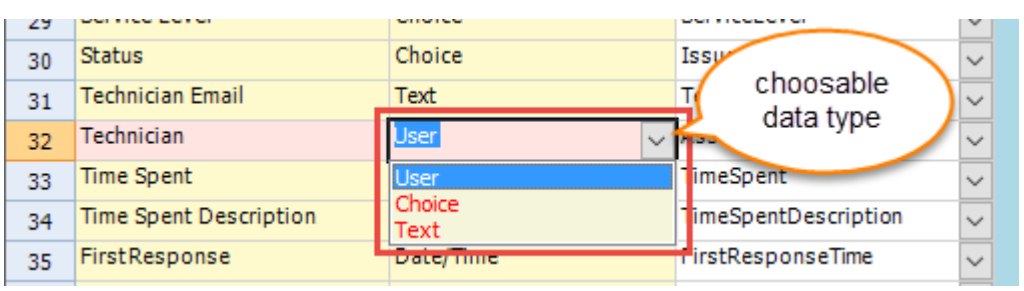
1. **For mandatory unmapped fields only** - Click this option under the '*Auto Create & Map fields*' menu to create the mandatory helpdesk fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red. The following fields are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

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

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



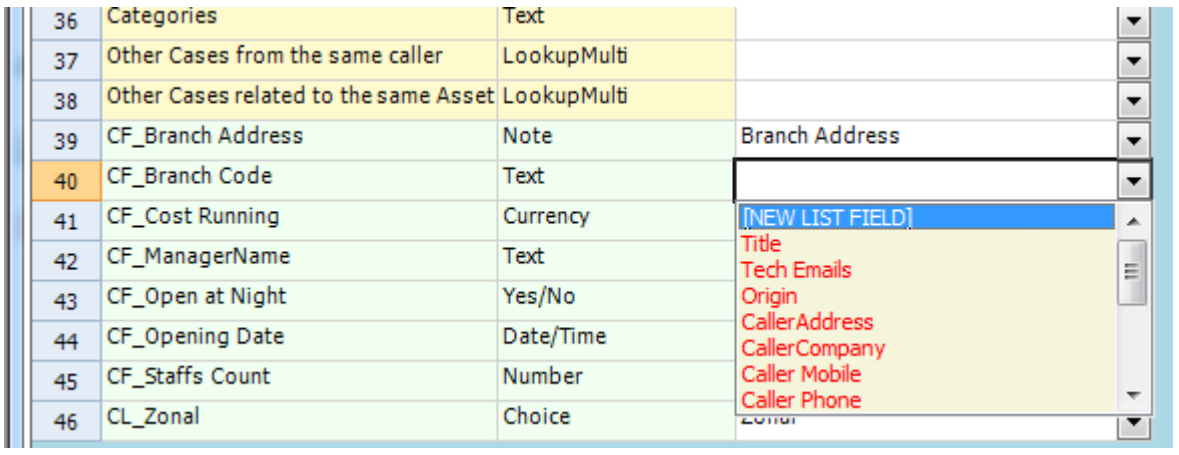
4. For '**Caller Name**' field, you can further specify which SharePoint data type will be used to store the caller information contained in the case in Outlook. For instance, you can choose if the SharePoint caller name field will store the info as a SharePoint user/group type (assuming the caller exists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



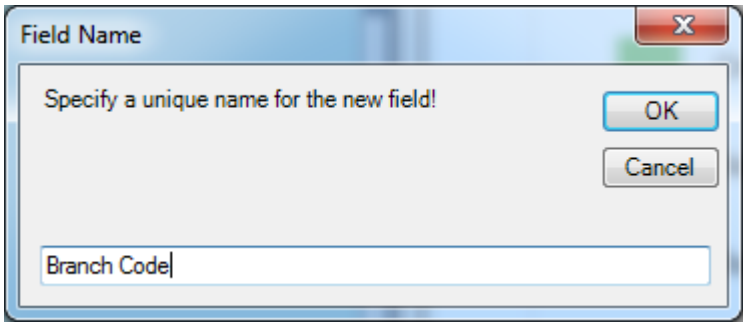
5 For '**Technician**' field, you can also specify which SharePoint data type will be used to store the technician information contained in the case in Outlook. For instance, you can choose if the SharePoint Technician field will store the info as a SharePoint user/group type (assuming the technician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

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

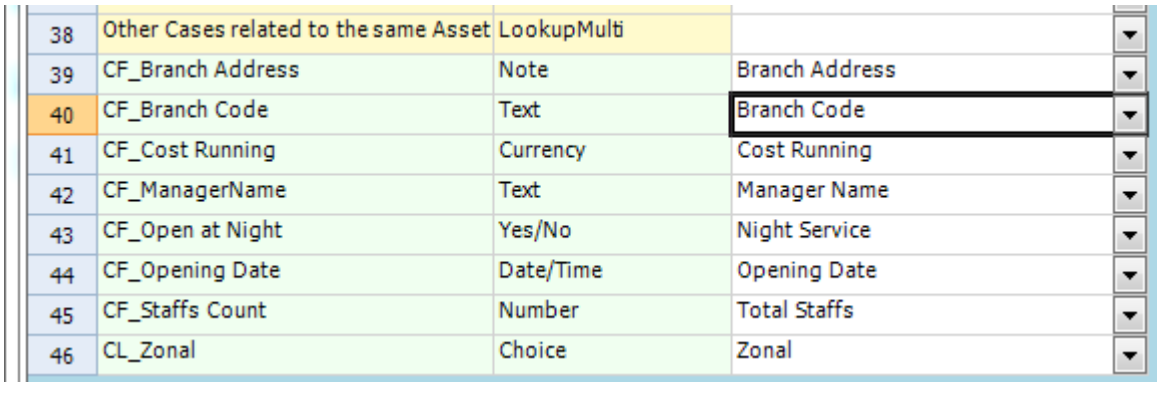
Create New SharePoint Field - on the fly.
In the drop-down list of the SharePoint field, you will also notice that there is an item **'[NEW LIST FIELD]'**. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific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



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.



Mandatory Fields for Mapping.
Note that the following Outlook Helpdesk fields are mandatory when you perform mapping:
Subject, HTML Body (or Consolidated Conversation), Caller Name, Technician, Problem Category, Problem Type, Due Date, Resolved.

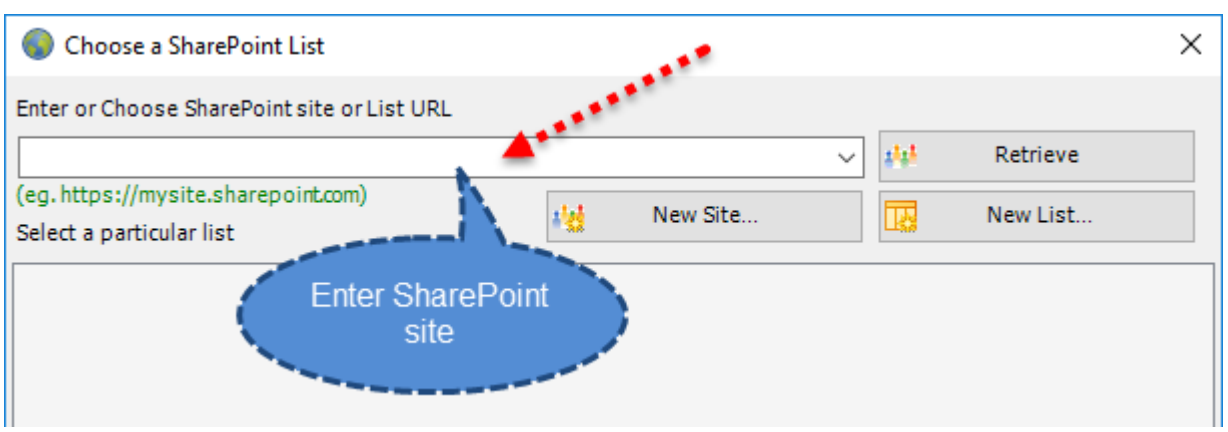
If any of these mandatory field(s) are not mapped, you will get a '*mandatory fields not mapped*' warning message and the settings won't be saved.

Available Helpdesk Fields in Outlook for mapping to SharePoint:
Asset Name, Asset Field 2, Asset Field 3, Asset Field 4, Asset Field5, Author, Caller Address, Caller Company, Caller Department, Caller Mobile, Caller Phone, Resolved, Date Closed, Date Created, Due Date, Log, Notes, Origin, Problem Category, Problem Type, Received Date, Service Level, Status, Technician, Technician Email, Time Spent, Time Spent Description, Subject, Body, HTML Body, Importance, Categories, Other Cases from the same caller, Other Cases related to the same Asset (and any custom fields you have defined).

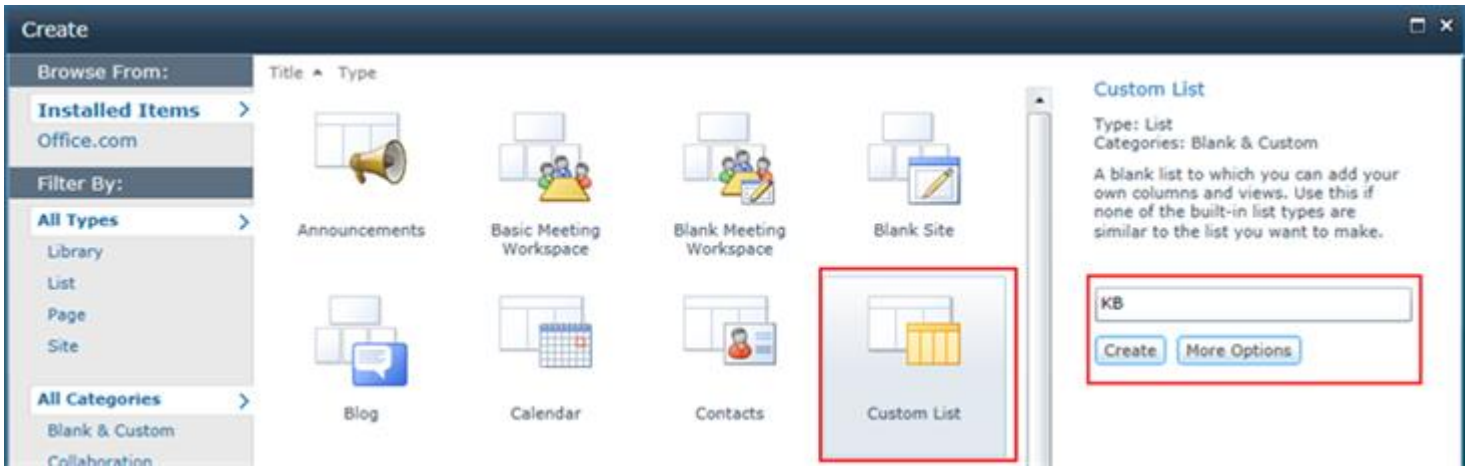
4.3 SharePoint Mapping – KB Article

when a KB article is published in Outlook, you can choose which Outlook KB fields get included in the SharePoint copy of the KB article. All you need to do is map the Outlook KB fields with relevant fields of the SharePoint list. Mapped settings are then accessible by all technicians in the helpdesk.

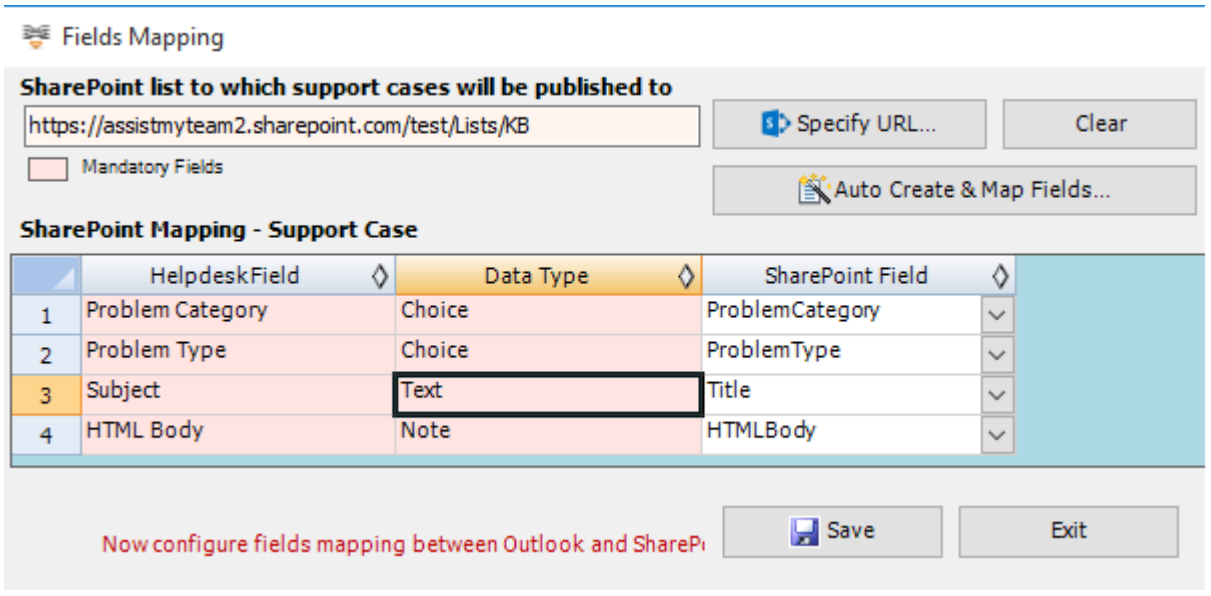
When you try to perform mapping KB with SharePoint, you will be prompted to enter the URL of your SharePoint site from which you can choose the particular destination SharePoint list under which copies of the KB articles in Outlook will be synchronized and stored.



And it would be used to store all the copies of KB article items, available in Outlook. You can use a simple custom list as it does not require that many fields. For instance, you can use the 'Custom List' template to create a new SharePoint list 'KB' for used with Team Helpdesk to store the KB articles.



And then choose this newly created SharePoint list (e.g. KB) or any other existing lists.



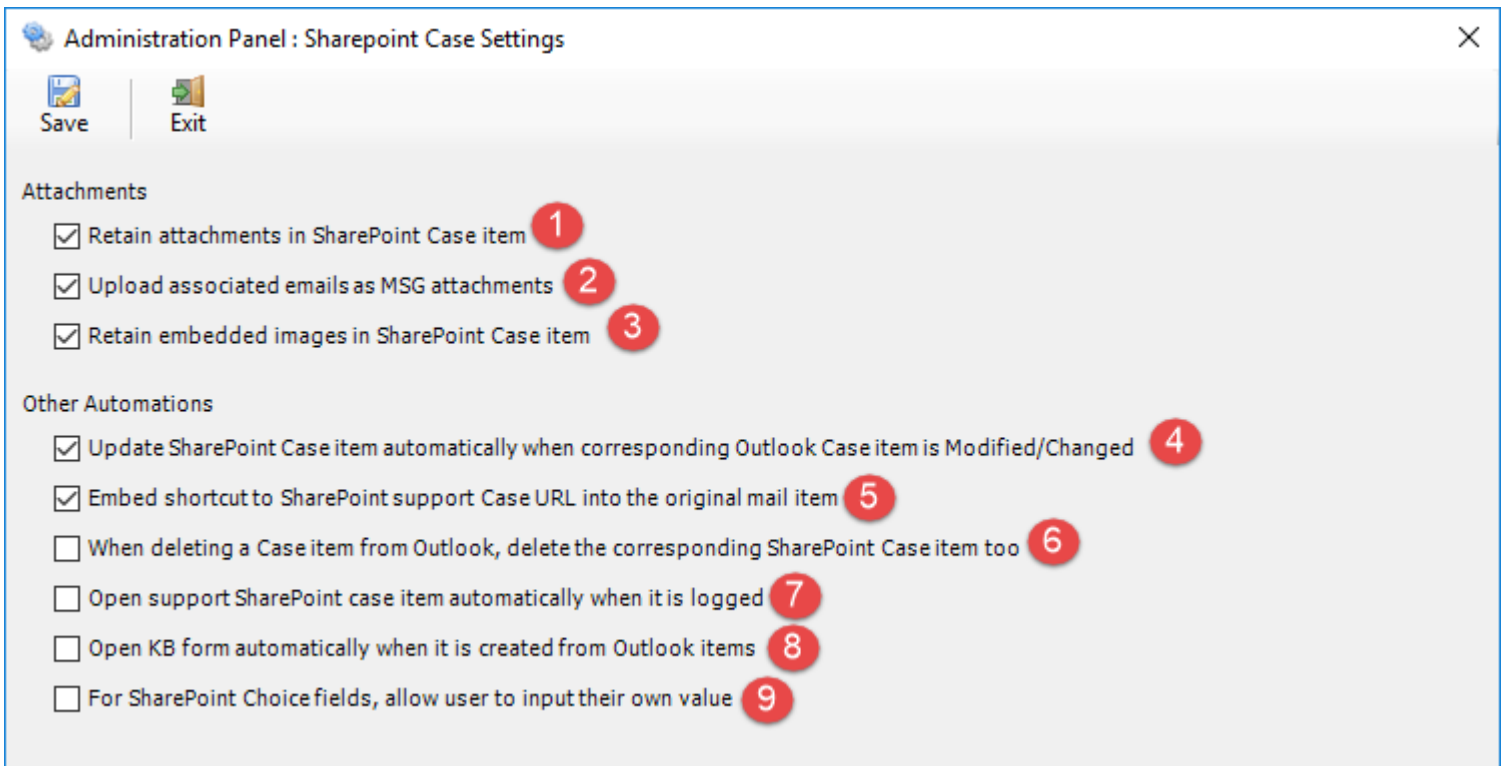
In the mapping dialog box (above), the first column lists all the KB Outlook fields. The second column displays the data type of the field. In the third column, there is a drop-down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field.

For example, in the screenshot above, Outlook KB field '**Subject**' is mapped to SharePoint field '**Title**', and Outlook Helpdesk field '**HTML Body**' to SharePoint field '**HTMLBody**' etc.

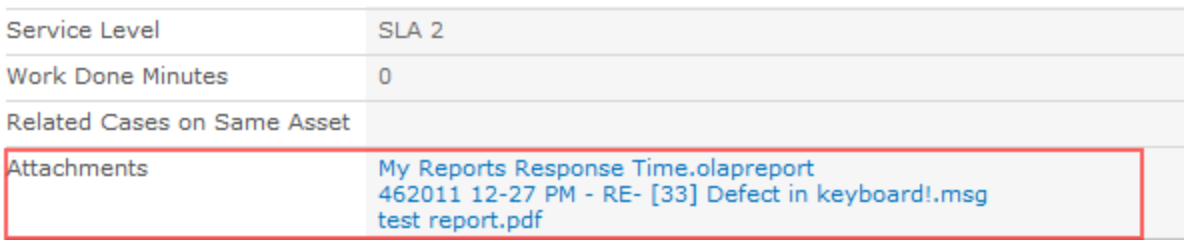
Available KB Fields in Outlook for mapping with SharePoint:
Subject, Body, HTML Body, Problem Category, Problem Type.

4.4 SharePoint Case Settings

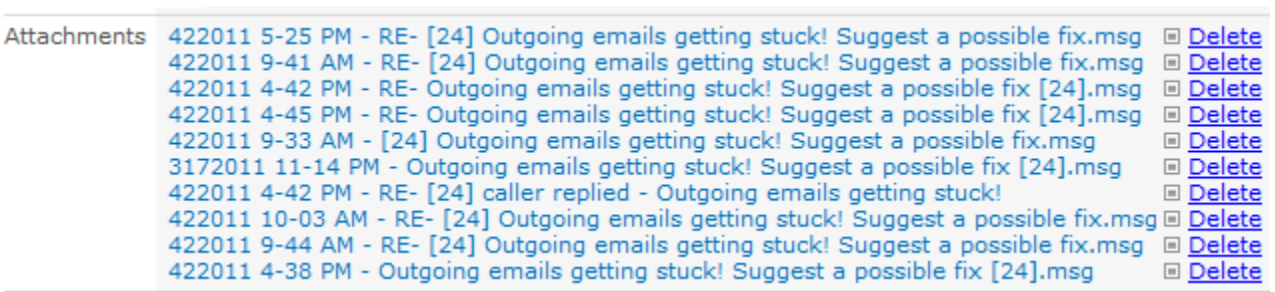
Helpdesk Manager can further customize how the individual support case appears in SharePoint.



1 **Retain attachments in the SharePoint Case item** – If enabled, Team Helpdesk will also upload the associated attachments from Outlook to SharePoint. And the attachments will appear as hyperlinks at the bottom of the SharePoint case form.

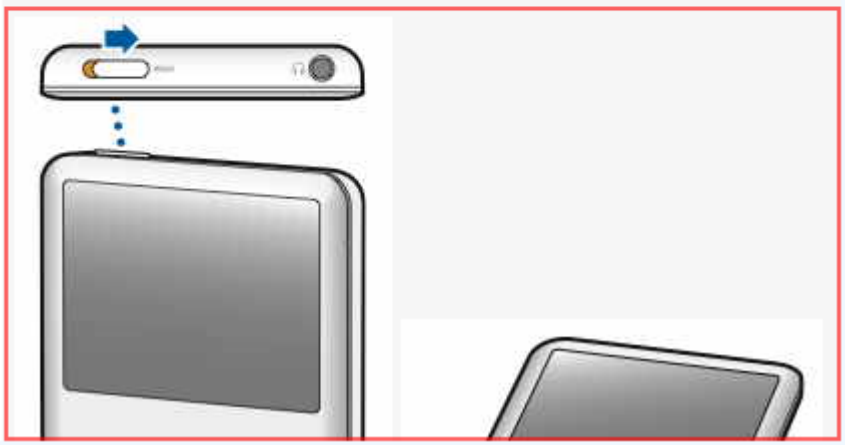


2 **Upload associated emails as MSG attachments** – If this is enabled, Team Helpdesk will generate MSG file format of the related emails, and upload as attachments to the SharePoint Case item.



3 Retain embedded images in SharePoint Case Item – If this is enabled, any embedded or inline images that may exist in the Outlook case item, will also be retained in the SharePoint copy of the case.

Title	[9] iPod won't turn on!
Assigned To	bytepad\johnnash
Issue Status	Processing
Priority	(2) Normal
Description	**4/1/2011 8:11:43 PM** - Case Due Date Lapsed Notification Sent to **And** **4/1/2011 8:10:57 PM** - Case Allotment Notification Sent to **Anderson** ***My iPod won't start after a prolong opera*** ***Resolution:*** ***Make sure the Hold switch is off*** 1. *Check to see if the Hold switch is on. It's located on the top or the* 2. *To turn the hold switch off, slide it until you no longer see the ora* 3. *Press any button to turn on iPod.*



4 **Update SharePoint Case item automatically when corresponding Outlook case item is modified/changed** – When enabled, Team Helpdesk will automatically perform an update to the SharePoint copy of the support case, when the Outlook case item is modified. This process helps in keeping the support cases in both Exchange and SharePoint in sync.

5 **Embed shortcut to the SharePoint support case URL into the Original mail item** – This will insert a hyperlink to the original Outlook mail item, from which the particular support case was generated. Clicking this embedded link will open the

6 **When deleting a Case item from Outlook, delete the corresponding SharePoint Case item too** – If enabled, Team Helpdesk will also remove the particular SharePoint copy of the Support Case, when the corresponding Case item is deleted from Outlook.

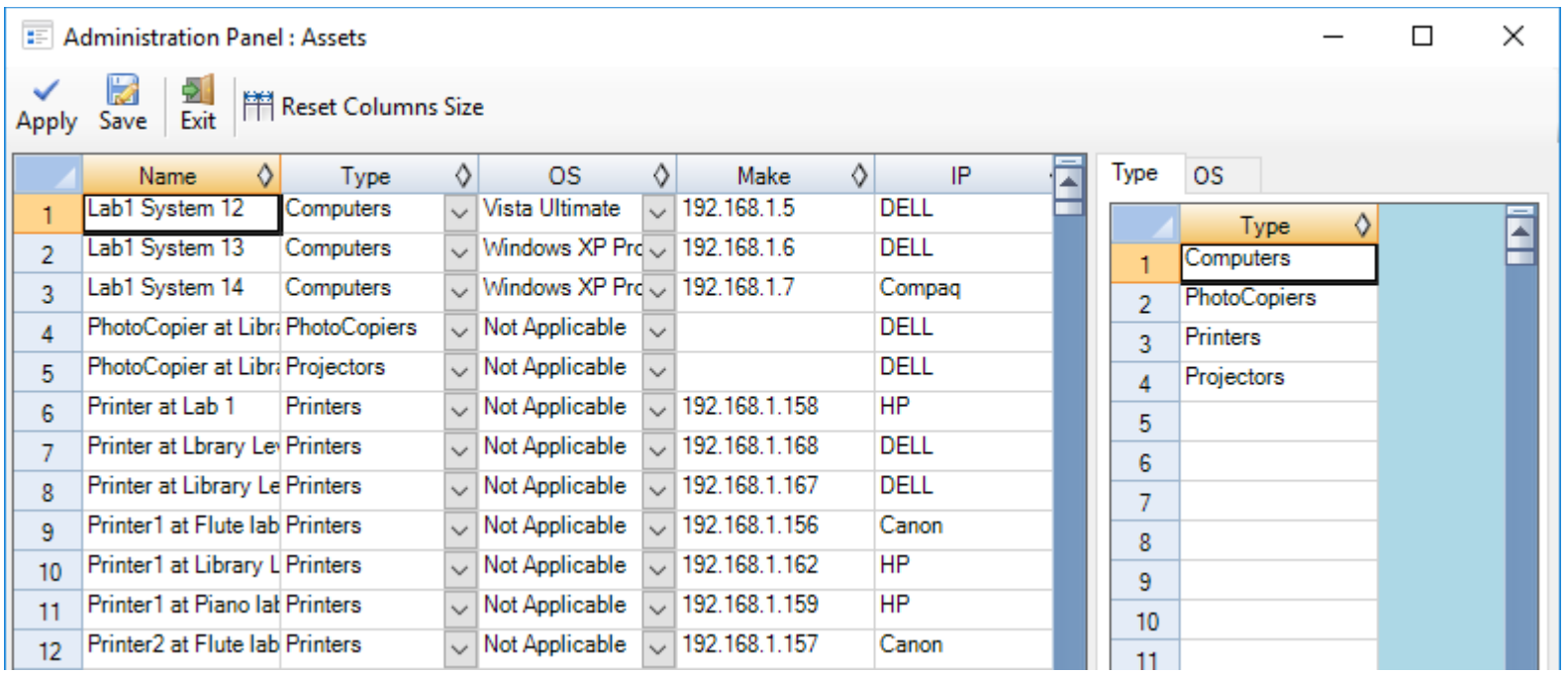
7 **Open SharePoint case item automatically when it is logged** – Enable this option to show the newly created SharePoint case item in web browser.

8 **Open KB form automatically when it is created from Outlook items** – Enable this option to show the newly created SharePoint KB item in web browser.

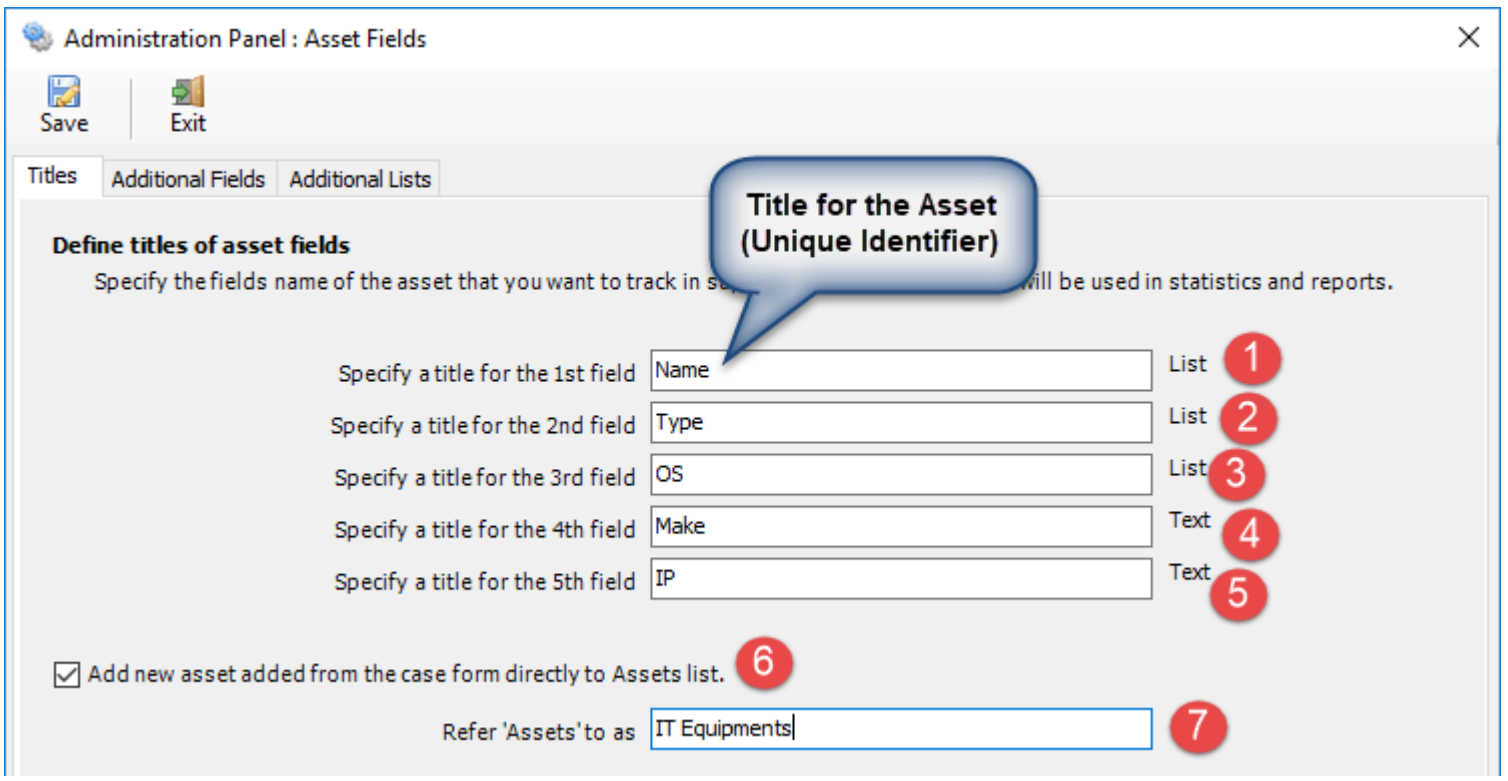
9 **For SharePoint Choice fields, allow user to input their own value** – Enable this option to enable users to input their own value in the helpdesk drop down fields of the SharePoint list.

4.5 Assets Configuration and Tracking

The helpdesk is a vital part of the company who wants to get the most out of its IT assets. The assets list allows you to track and manage support request from your internal users for quick resolution to the case. There are 5 asset fields available out of which 4 are customizable according to your need. Out of the 4, 2 of them are drop-down fields. In the above screenshot, we have taken the example of computing resources used by internal staffs. We have customized the 2nd and 3rd fields as Asset type and Asset OS, which takes a drop-down list. Both the drop-down lists are available on the right. The 4th and 5th fields (e.g. Asset IP, Asset Make) take the normal text data.



The titles of these customizable fields can be set in 'Asset Fields' settings.



1 Input a unique identifier name of the asset.

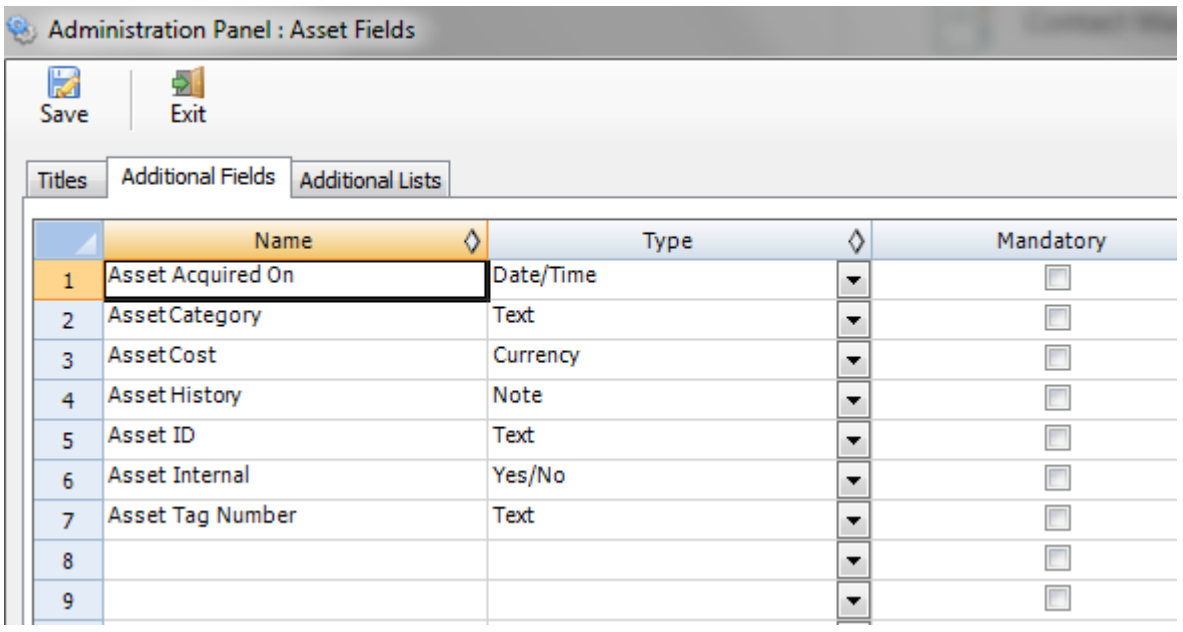
2 Input a title for the 2nd field of the asset. This takes a drop-down list which you can define under the first tab of right side.

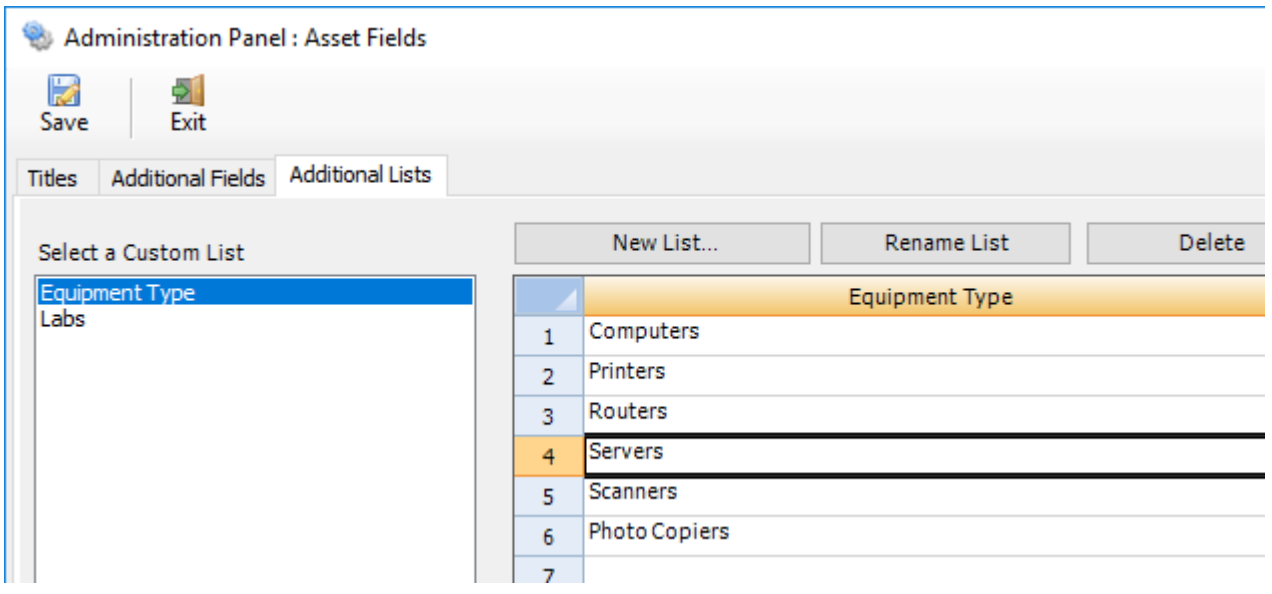
3 Input a title for the 3rd field of the asset. This also takes a drop-down list which you can define under the second tab of right side.

4. Input a title for the 4th field of the asset. This takes a static text type.
5. Input a title for the 5th field of the asset. This also takes a static text type.
6. Allow addition of new asset that was entered in the case form to the global assets list and save to the database.
7. Give a title that best describe the asset or equipment you are trying to tracking with Team Helpdesk.

Additional Asset fields

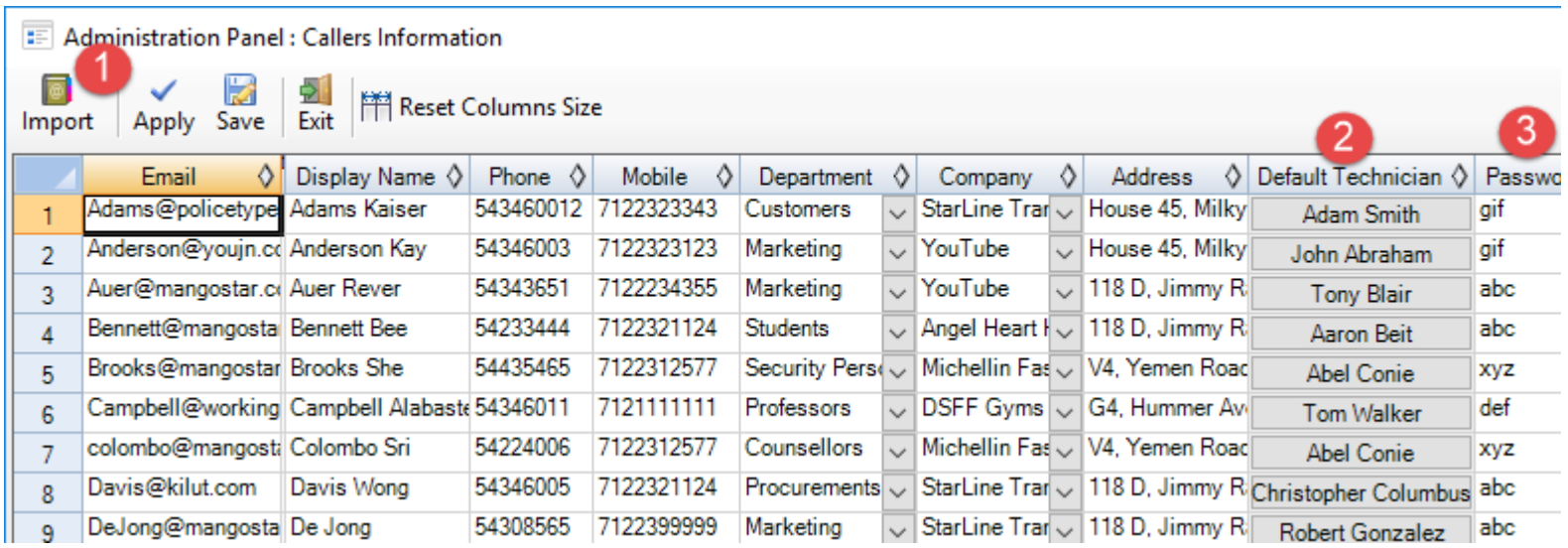
By default, Team Helpdesk has provision for 5 predefined asset fields. However, if you need more, the manager can define and add any number of secondary asset fields that takes varying data types such as *text*, *number*, *yes/no, note, date or currency* under **Team Helpdesk Manager > Asset Fields** panel (**Additional Fields**, **Additional Lists** tabs). All defined custom fields are available in summary reports and OLAP Statistics tool.





4.6 Callers list

Team Helpdesk can maintain the detail of the callers that request for support. The caller's email address is a mandatory field and should be unique for each caller that you entered. If there has to be phone calls to callers from within Team Helpdesk (say, from the outlook form), the phone and mobile need to be filled up. The mobile field is also necessary if callers have to receive SMS notifications in their mobile device. The department field has a restricted range (as being a drop-down field) i.e., it can take only take a value from the caller categories.



	Email	Display Name	Phone	Mobile	Department	Company	Address	Default Technician	Passwo
1	Adams@policetype	Adams Kaiser	543460012	7122323343	Customers	StarLine Trar	House 45, Milky	Adam Smith	gif
2	Anderson@youjn.co	Anderson Kay	54346003	7122323123	Marketing	YouTube	House 45, Milky	John Abraham	gif
3	Auer@mangostar.c	Auer Rever	54343651	7122234355	Marketing	YouTube	118 D, Jimmy R	Tony Blair	abc
4	Bennett@mangosta	Bennett Bee	54233444	7122321124	Students	Angel Heart I	118 D, Jimmy R	Aaron Beit	abc
5	Brooks@mangostar	Brooks She	54435465	7122312577	Security Pers	Michellin Fas	V4, Yemen Roac	Abel Conie	xyz
6	Campbell@working	Campbell Alabaste	54346011	7121111111	Professors	DSFF Gyms	G4, Hummer Av	Tom Walker	def
7	colombo@mangosta	Colombo Sri	54224006	7122312577	Counsellors	Michellin Fas	V4, Yemen Roac	Abel Conie	xyz
8	Davis@kilut.com	Davis Wong	54346005	7122321124	Procurements	StarLine Trar	118 D, Jimmy R	Christopher Columbus	abc
9	DeJong@mangosta	De Jong	54308565	7122399999	Marketing	StarLine Trar	118 D, Jimmy R	Robert Gonzalez	abc

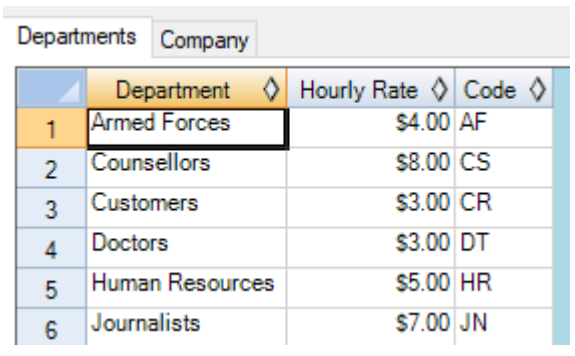
1 **Import callers from Global Address List/Active Directory** - Most likely, you might already have contact details of the callers in the exchange global address list. Use the **'Import...'** button to display the address book and select those contacts that you want to import. The contact's name, email,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

2 **Default technician** - Each caller entry can also take a default technician. This is useful if you want to dynamically assign this default technician to a case (just generated from an email or a web form submission) send by a particular caller (that exist in the Team Helpdesk callers list). This setup automatically triggers the notifications to the concerned technician in the form of email, SMS etc.

3 **Caller Web Access (CWA) Password** - To access the Caller Web Access (CWA) site from a web browser via the internet, the caller requires a password. This password is defined by the helpdesk manager when a new caller is added. Alternatively, it can be generated automatically when a new, non-existent caller is added to the Team Helpdesk callers list. The password can then be set to insert into the notification/confirmation email sent out to caller first time when a support case is logged from their email/call/web submission

Departments & Companies

Specify what all internal departments your help desk team would support incoming service requests from callers. You can then use a category/department to associate each caller. You can also specify the default hourly rate for each department, so that, when using statistics, you can consider this rate, besides the other two rates - technician rate and problem category rate.

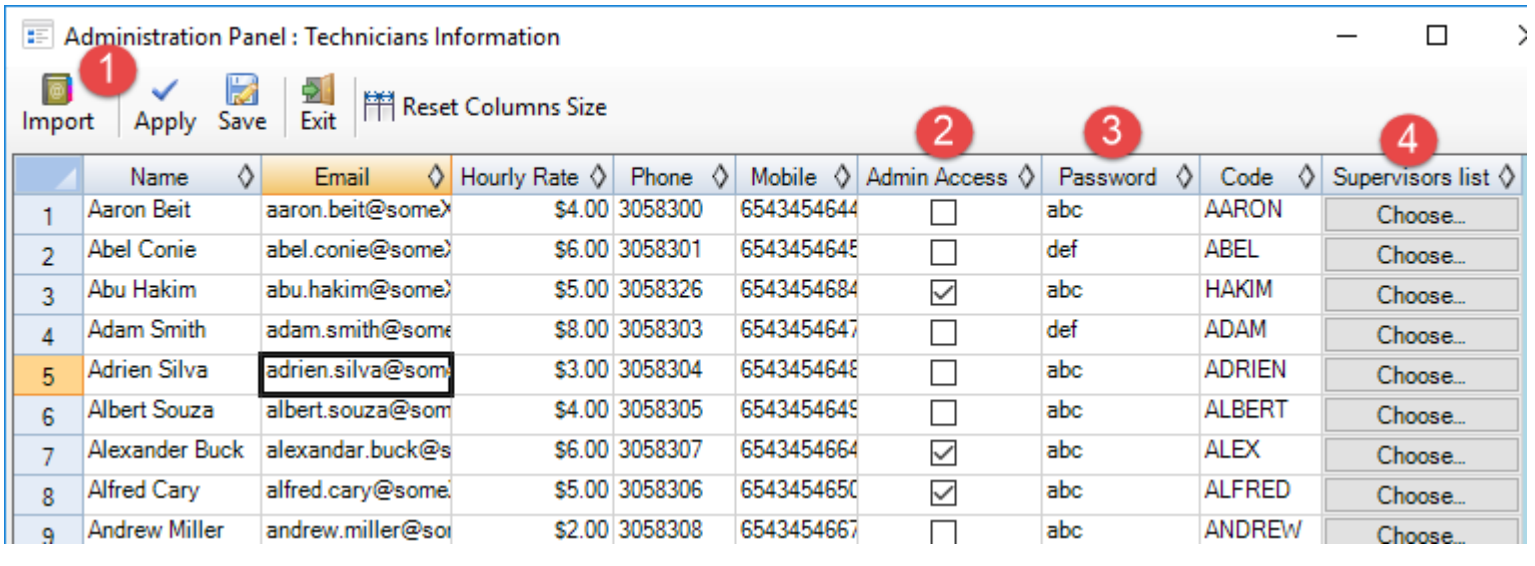


	Department	Hourly Rate	Code
1	Armed Forces	$4.00	AF
2	Counsellors	$8.00	CS
3	Customers	$3.00	CR
4	Doctors	$3.00	DT
5	Human Resources	$5.00	HR
6	Journalists	$7.00	JN

4.7 Technicians List

Team Helpdesk System needs to maintain the detail of the technicians that would be working on support cases. The technician name and email address are mandatory fields and should be unique for each technician that you entered. If there has to be calls to technicians from within Team Helpdesk (say, from the outlook form), the phone and mobile needs to be filled up.

There is also an option of making the mobile number of the technician as the primary contact (e.g. when making Calls, Team Helpdesk will use the mobile number instead of the phone number). The mobile field is also necessary to receive SMS notifications they are enabled.



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

2. **Admin Access** - The administrative settings and tools in Team Helpdesk can be allowed selective access to technicians. Enable this option to categories which technicians should have administrative access and which should not. By default, this option is disabled, which means all technicians will have administrative access. Learn more.

3. **WebAccess Password** - The password field is used to authenticate technicians when they logged in to the Team Helpdesk Web Access interface on a browser. Please note that this password is different than the one used in the active directory account.

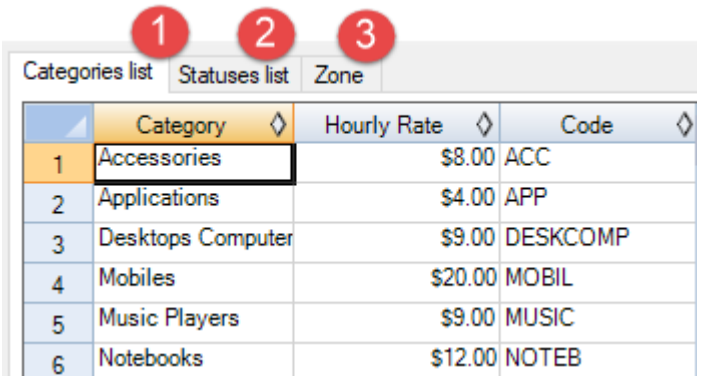
4. **Supervisors** – You can assign one or more supervisors specific to each technician so that when a SLA breach occurs on cases, the associated supervisors are automatically escalated and notified.

4.8 Categories, Types and Statuses Management

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

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

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



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

1 Problem categories list

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

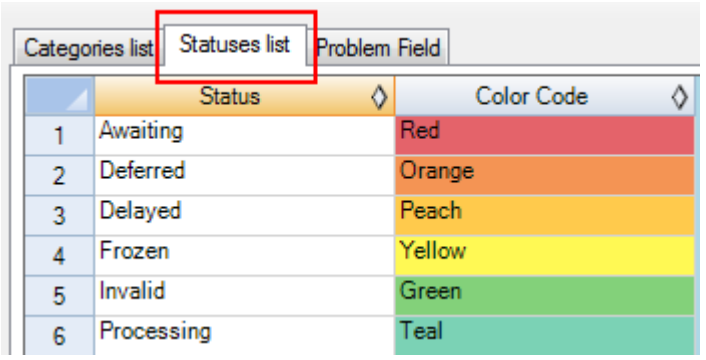
2 Problem statuses list

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.

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

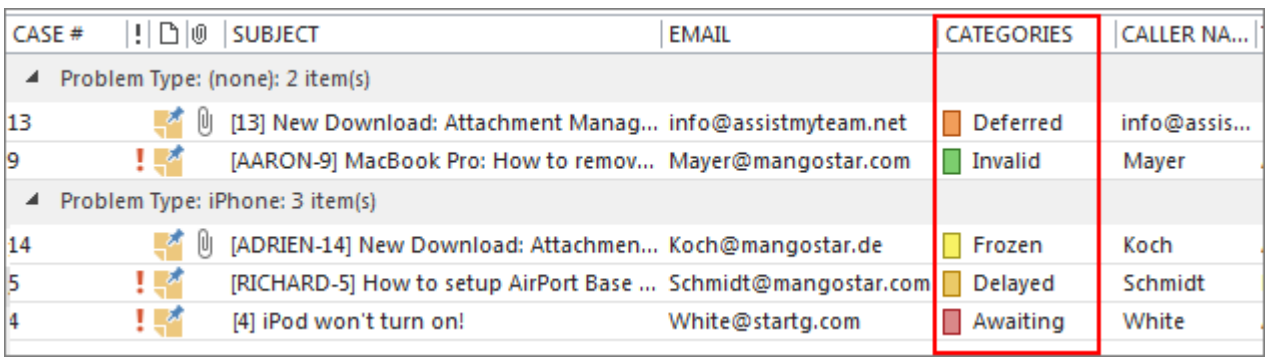
You can choose from one of the 20 colors supported by Outlook for color coding Outlook items (via Categories field of the Outlook item).

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



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

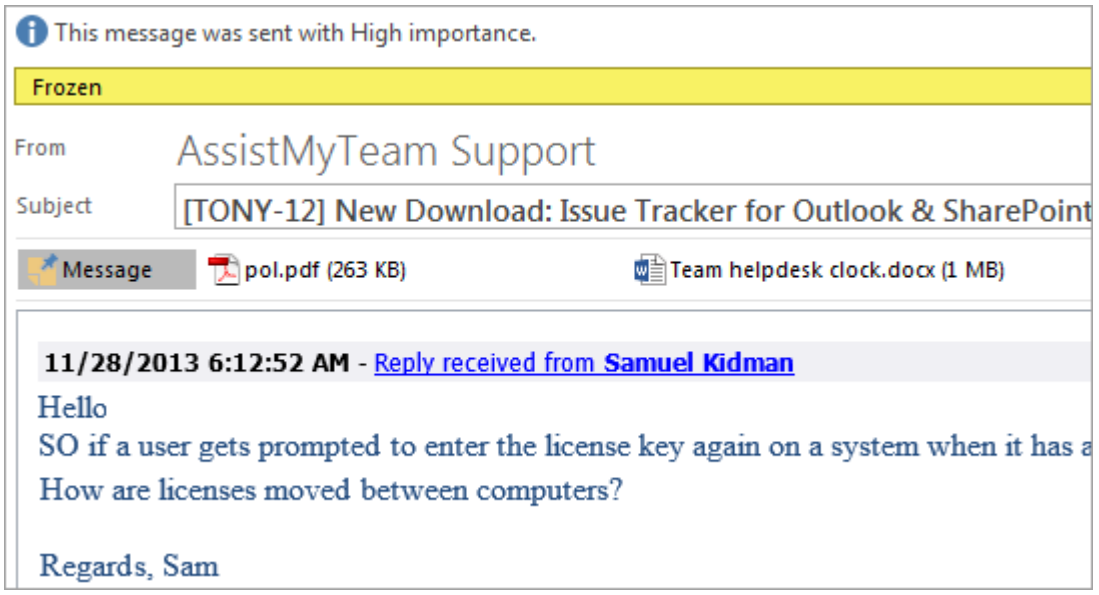
When you set the status of the case or when the add-in does that automatically using the default status values set for various events, you will see that the categories column of the case item has color-coded status.



CASE #	SUBJECT	EMAIL	CATEGORIES	CALLER NA...
Problem Type: (none): 2 item(s)				
13	[13] New Download: Attachment Manag...	info@assistmyteam.net	Deferred	info@assis...
9	[AARON-9] MacBook Pro: How to remov...	Mayer@mangostar.com	Invalid	Mayer
Problem Type: iPhone: 3 item(s)				
14	[ADRIEN-14] New Download: Attachmen...	Koch@mangostar.de	Frozen	Koch
5	[RICHARD-5] How to setup AirPort Base ...	Schmidt@mangostar.com	Delayed	Schmidt
4	[4] iPod won't turn on!	White@startg.com	Awaiting	White

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

And if you preview the case or view it in the case form, you will also see the color bar in the header.

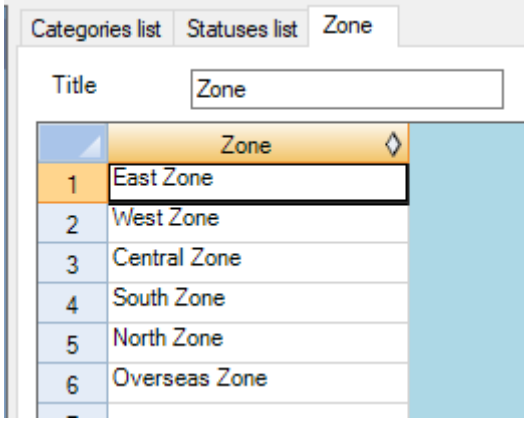


3 Problem Field List

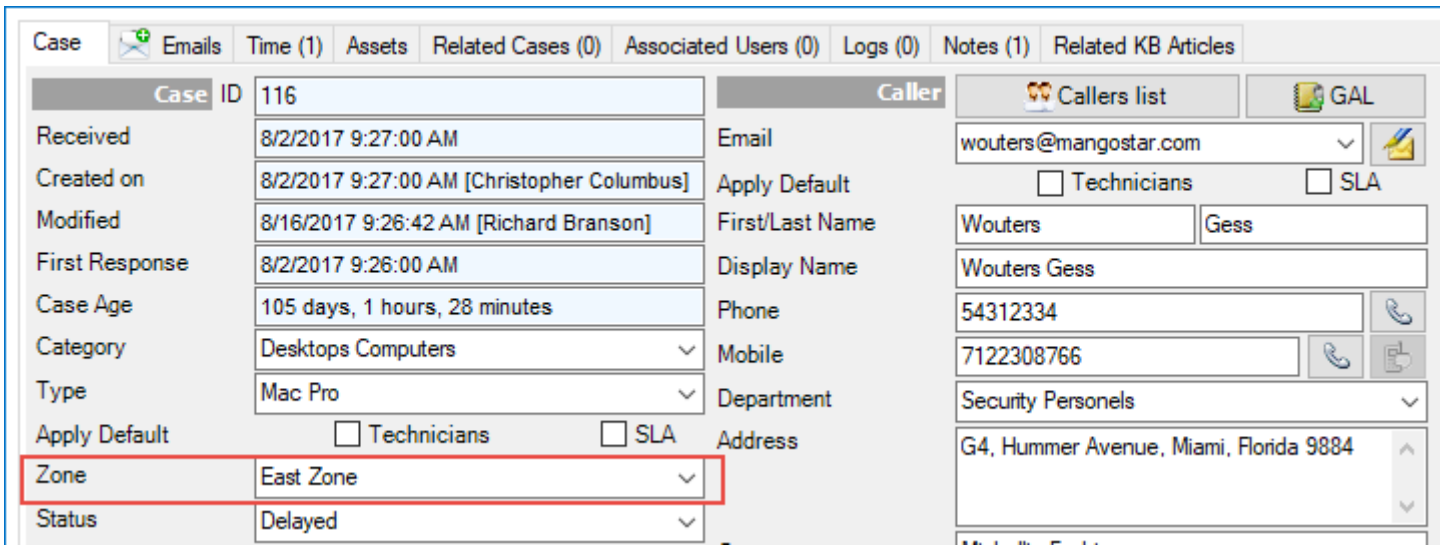
This is customizable drop-down field that is provided to complement the multiple hierarchical representation of the problem type.

This field appear in the Outlook case form, (just like the Problem Category and type fields) and selecting a particular problem type would automatically populate the corresponding value for this field too.

You can change the title of this problem field. By default, it is named as 'Problem Field', but you can change it to suit its purpose. For example, in the screenshot above, this special problem field is named as 'Zone', and the possible values are defined in the list.



When you open the case form, you will see a new field 'Zone' is now available with a drop-down field. When you select a particular problem type, the value of this problem field (i.e., Zone) would be automatically assigned, based on the linked relationship, that existed in the Problems list. Lastly, this new column (or field) should also be available in the summary reports and OLAP Statistics tool.



Problem types list

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

Administration Panel : Problems

Apply | Save | Exit | Reset Columns Size

	Problem Type	Problem Category (1)	Default Time (2)	Default Technician (3)	Default SLA (4)	Zone (5)	Code (6)
1	Airport Base Station	Accessories	30.00	Thomas Taylor	SLA 5	Overseas Zone	AIRPORT
2	Apple Rental	Services	18.00	Tom Walker	SLA 1	West Zone	APPLERENTAL
3	Apple TV	Accessories	30.00	Richard Branson	SLA 3	West Zone	APPLETV
4	Apple Wireless Key	Accessories	30.00	George Bernard	SLA 4	Overseas Zone	APPLEKEYB
5	Apple Wireless Mou	Accessories	30.00	John Abraham	SLA 3	East Zone	APPLEMOUSE
6	AppleCare	Services	30.00	Austin Jane	SLA 5	Overseas Zone	APPLECARE
7	Buy Back Scheme	Services	18.00	Adam Smith	SLA 3	East Zone	BUYBACK
8	Complains	Services	18.00	Tony Blair	SLA 2	Overseas Zone	COMPLAINS
9	iPhone 3G	Mobiles	25.00	Adam Smith	SLA 1	West Zone	IPHONE3G
10	iPhone	Mobiles	24.00	Aaron Beit	SLA 3	East Zone	IPHONE
11	iPod Classic	Music Players	32.00	Abu Hakim	SLA 5	West Zone	IPODCLASSIC
12	iPod Nano	Music Players	22.00	Thomas Taylor	SLA 1	Central Zone	IPODNANO

In the Outlook case and knowledge base form, 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. These also assist in providing high-level information to help desk managers in automatic assignment of cases to the correct technician.

1. **Problem Category** to which this problem type belongs to. If a particular problem type is applicable to all problem categories, leave it as empty. That is, if you have a common problem type for all Problem categories, you don't need to add the same problem type for each category. Just leave the Problem Category column empty for that problem type.

2. **Default time** (in minutes) under which the particular problem is expected to be fixed/resolved.

3. **Default technician** who has expertise on that problem. You can also assign multiple technicians to a problem type. And these default technicians could be automatically assigned to cases that are tagged with this problem type.

4. **Default SLA** under which the problem fits into. A problem's priority is determined by its impact on users and on the business and its urgency. Urgency is how quickly the organization requires a resolution to the problem. The impact is a measure of the extent of potential damage the problem can cause the organization. Prioritizing the problem allows organizations to mitigate damage to the service level agreement (SLA) by reallocating resources as soon as the issue is known.

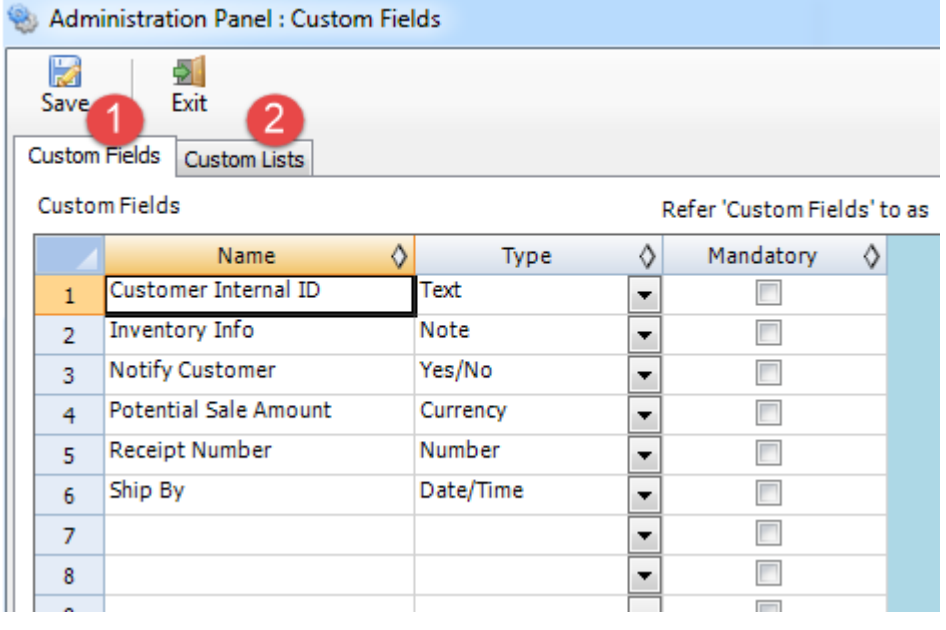
5. Choose a **default problem field** (titled as 'Zone' in our example) from the drop-down list for a problem type.

6. **Code** – This is an abbreviated code that you can define for each problem type. This could be one of the tracking code that helpdesk manager can configure for embedding into the subject of the case item (along with the case ID) for easy recognition and tracking.

4.9 Custom Fields

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

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

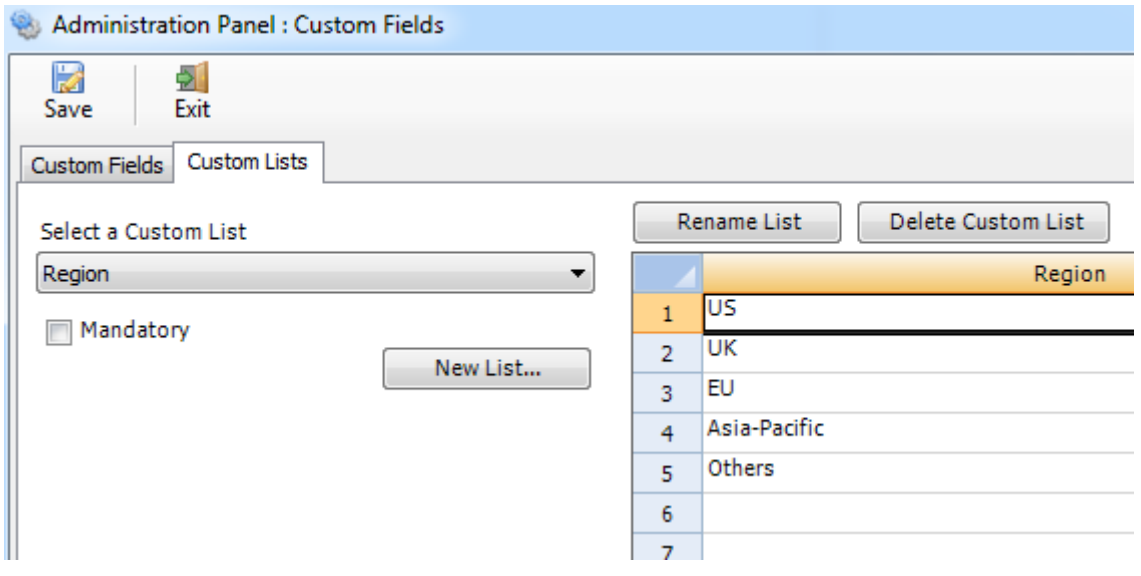


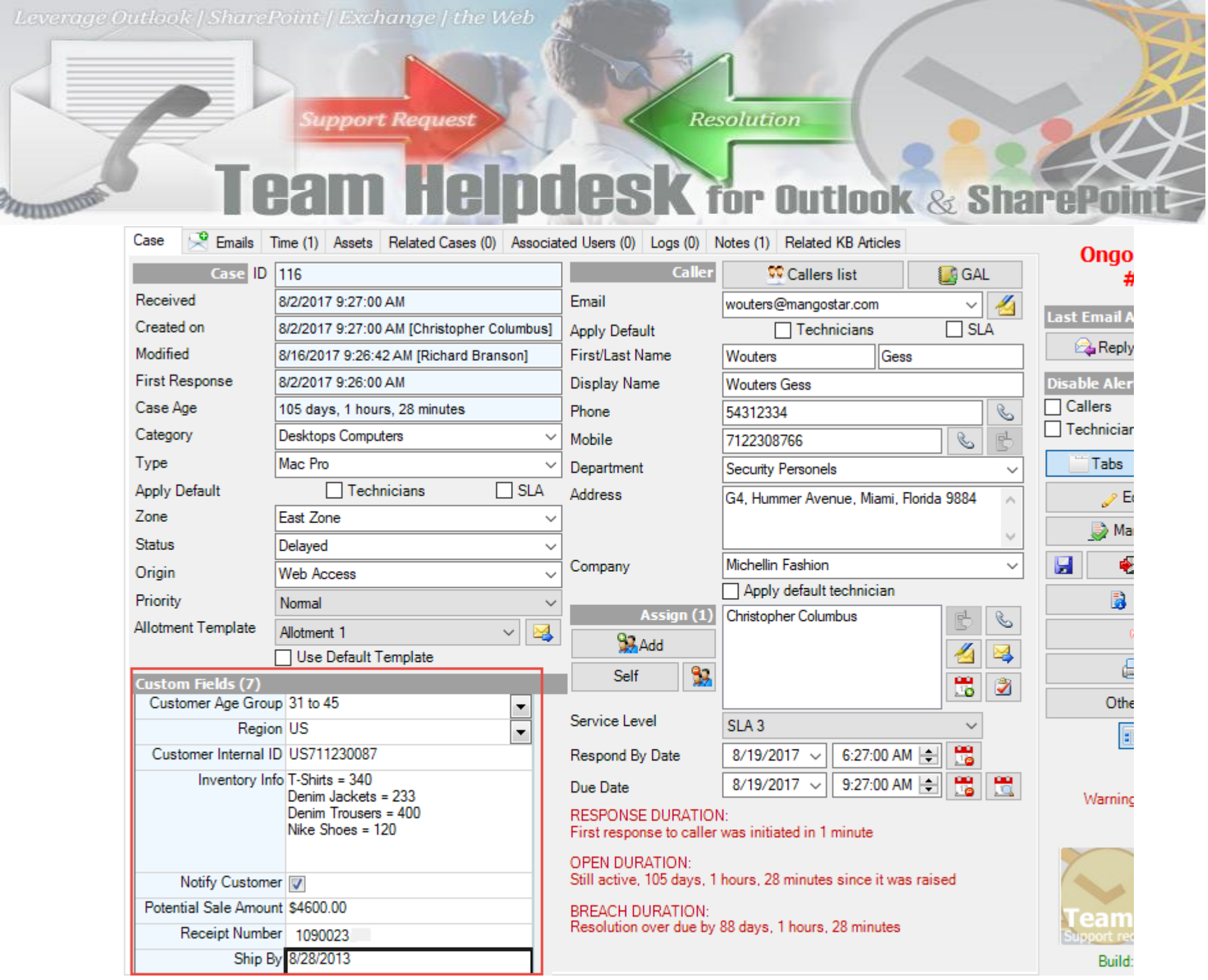
1 **Custom fields** can be of 6 different data types as displayed in the image above:
Currency, Date/Time, Numeric, Text, Yes/No, Note.

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

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

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

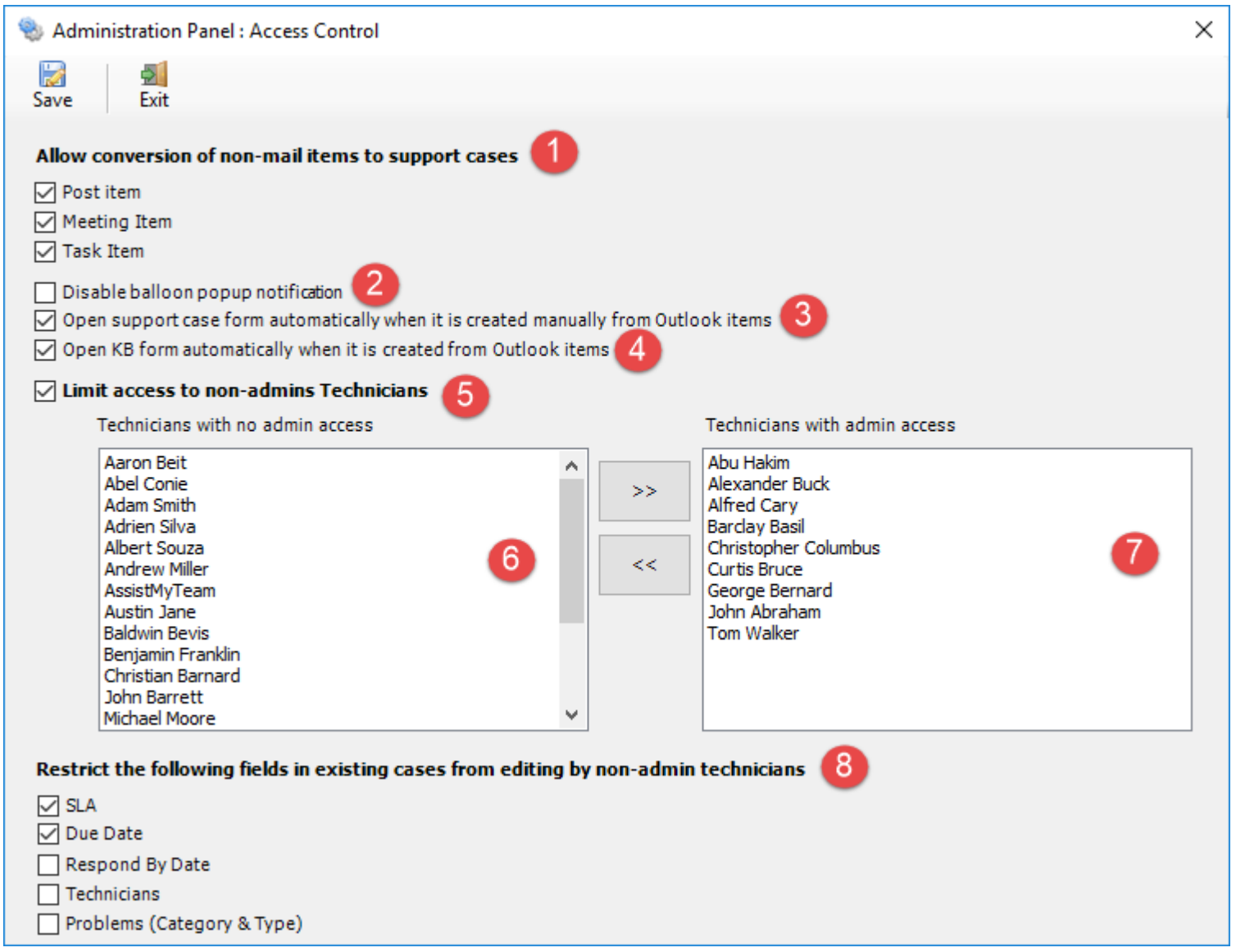




When you open a case in Outlook, the custom fields are available to collect further data on the caller or problem or related to the case in general.

4.10 Access Control

In this panel, the administrator can control what particular subset of features and options are available to the technicians.



1. **Allow conversion of non-mail items to support case** - The manager can also define which particular type of Outlook items are possible candidates for generating support request cases. By default, support requests can be generated from mail items only. To enable other Outlook item types, select the appropriate checkboxes - **Post, Meeting** or **Task**.

2. **Disable balloon popup notification** - Disable a balloon popup notification when a major event occurred in Team Helpdesk System. By default, it is unchecked.

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

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

5. **Limit access to non-admin technicians** - The administrative settings and tools in Team Helpdesk can be allowed selective access to technicians. Enable this option to categories which technicians should have administrative access and which should not. By default, this option is disabled, which means all technicians will have administrative access.

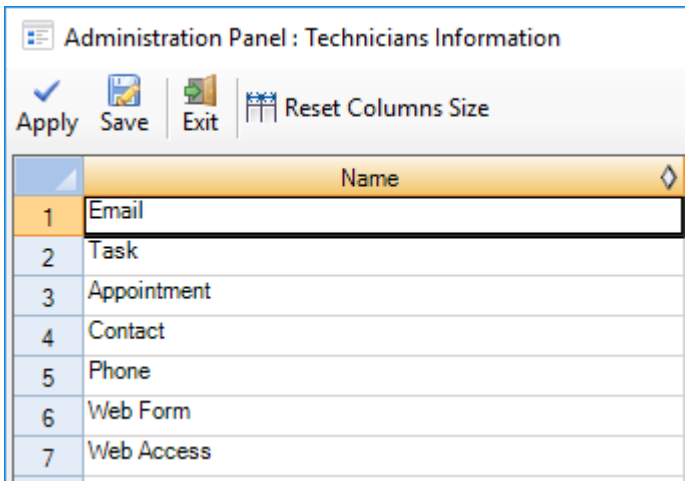
6. List of team members with no admin access (one with the red background). You can use the buttons **>>** or **<<** to swap the access level.

7. List of team members with admin access (one with the green background). You can use the buttons **>>** or **<<** to swap the access level

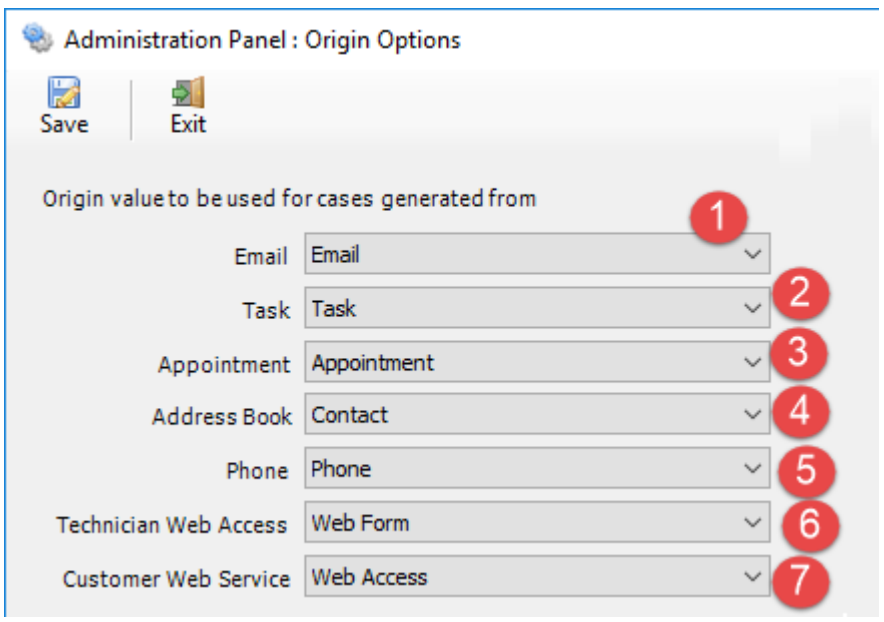
8. Restrict certain managerial specific fields (such as SLA, Due Date, Assigned Technicians, Problems etc.) in the support case form from being edited by support workers with no admin access.

4.11 Origin List

In Team Helpdesk, a case could be raised from different source such as an email, phone call, contact, or from web form. In the case form, a 'Origin' field is provided that shows the source of the case. Helpdesk managers can add the number of difference origin a case could be originated from.



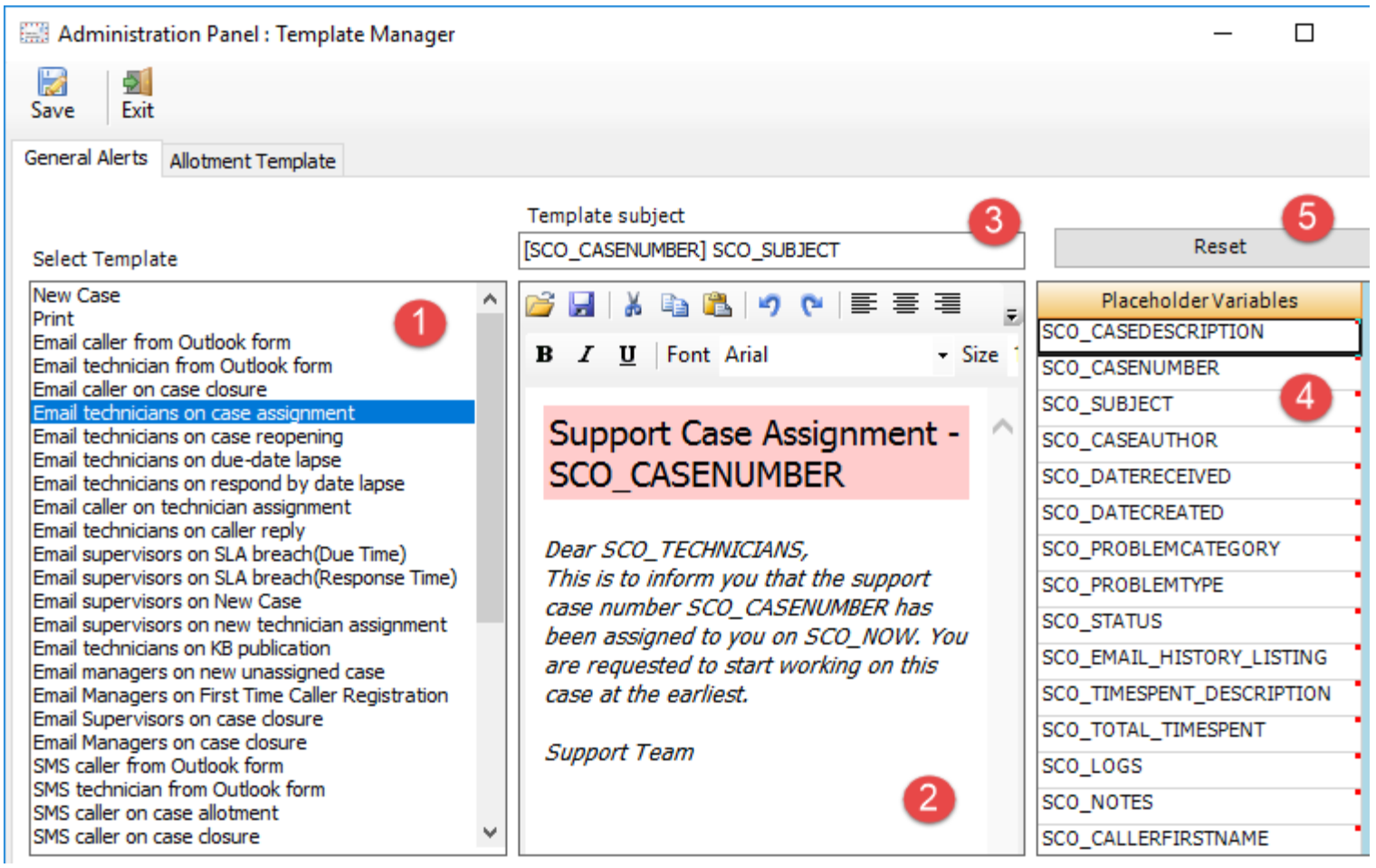
And further, each origin in the list can be mapped or associated with the predefined header under **Team Helpdesk Manager > Origin** Options.



1. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from Outlook emails.
2. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from Outlook tasks.
3. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from Outlook appointments.
4. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from Outlook contacts.
5. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from phone calls.
6. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from web form (Technician Web Access site).
7. Choose an origin value (defined in the Origin List) that will be associated with cases that were raised from web form (Customer Web Service).

4.12 Templates Manager

Team Helpdesk uses various templates (emails as well as SMS) for sending out notifications and reminders to callers and technicians - both manual and automatic. Email notifications take HTML format whereas SMS notifications use plain text. There are a whole lot of notification options for different events such as when a case is created, changed or resolved, or when a technician is assigned to the case, or when the due date has lapsed etc. Automated emails and SMS are sent out directly when a relevant event occurs and the whole exercise is transparent to the technicians.



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

Template	Purpose
New case	HTML template used in logging new support request case (applicable on both manual and automatically created cases)
Print	HTML template used when printing the support case item in Outlook
Email caller from case form	HTML template used when contacting the caller of a case
Email technicians from case form	HTML template used when contacting the technician responsible for a case
Email caller on case closure	HTML template used in the automated email to the caller to notify about the successful resolution to the allotted case
Email technicians on case assignment	HTML template used in the automated email to the technicians to notify when a case is assigned
Email technicians on case reopening	HTML template used in the automated email to the concerned technicians when a resolved case has been re-opened

Email technicians on due-date lapse	HTML template used in the automated email to the concerned technicians when the due date of a case is about to be overdue
Email technicians on respond by date lapse	HTML template used in the automated email to the concerned technicians when the respond by date of a case is about to be overdue
Email caller on technician assignment	HTML template used in the automated email to the caller when new technicians are assigned or existing ones changed
Email technicians on caller reply	HTML template used in the automated email to concerned technicians to inform about new replies from the caller
Email supervisors on SLA breach (Due Time)	HTML template used in the automated email to helpdesk supervisors to inform about SLA breach occurrence on due time lapse
Email supervisors on SLA breach (Response Time)	HTML template used in the automated email to helpdesk supervisors to inform about SLA breach occurrence on response time lapse
Email Supervisors on New Case	HTML template used in the automated email to supervisors to inform about a new case
Email Supervisors on new technician assignment	HTML template used in the automated email to supervisors to inform about assignment of technicians to a case
Email Technicians on KB publication	HTML template used in the automated email to all helpdesk staffs to inform about new KB publication
Email Managers on new unassigned case	HTML template used in the automated email to managers to inform about an unassigned case
Email Managers on First Time Caller registration	HTML template used in the automated email to managers to inform about new caller being added and registered with the helpdesk
Email Supervisors on case closure	HTML template used in the automated email to supervisors to inform on the completion and closure of a case
Email Managers on case closure	HTML template used in the automated email to managers to inform on the completion and closure of a case
SMS caller from case form	Plain text template used when contacting the caller of a case
SMS technicians from case form	Plain text template used when contacting the technician responsible for a case
SMS caller on case allotment	Plain text template used in the automated SMS to the caller to notify about the successful logging of the support request
SMS caller on case closure	Plain text template used in the automated SMS to the caller to notify about the successful resolution to the allotted case
SMS technicians on case assignment	Plain text template used in the automated SMS to the technicians to notify when a case is assigned
SMS technicians on case reopening	Plain text template used in the automated SMS to the concerned technicians when a resolved case has been re-opened
SMS technicians on due-date lapse	Plain text template used in the automated SMS to technicians when the due date of a case is about to be overdue

SMS technicians on respond by date lapse	Plain text template used in the automated SMS to technicians when the respond by date of a case is about to be overdue
SMS caller on technician assignment	Plain text template used in the automated SMS to the caller when new technicians are assigned or existing ones changed
SMS technicians on caller reply	Plain text template used in the automated SMS to concerned technicians to inform about new replies from the caller
SMS supervisors on SLA breach (Due Time)	Plain text template used in the automated SMS to helpdesk supervisors to inform about SLA breach occurrence on due time
SMS supervisors on SLA breach (Response Time)	Plain text template used in the automated SMS to helpdesk supervisors to inform about SLA breach occurrence on response time
SMS technicians on KB publication	Plain text template used in the automated SMS to all helpdesk staffs to inform about new KB publication
SMS managers on unassigned case	Plain text template used in the automated SMS to managers to inform about an unassigned case
SMS Managers on first time registration	Plain text template used in the automated SMS to managers to inform about new caller being added and registered with the helpdesk
SMS Supervisors on case completion	Plain text template used in the automated SMS to managers to inform on the completion and closure of a case

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

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

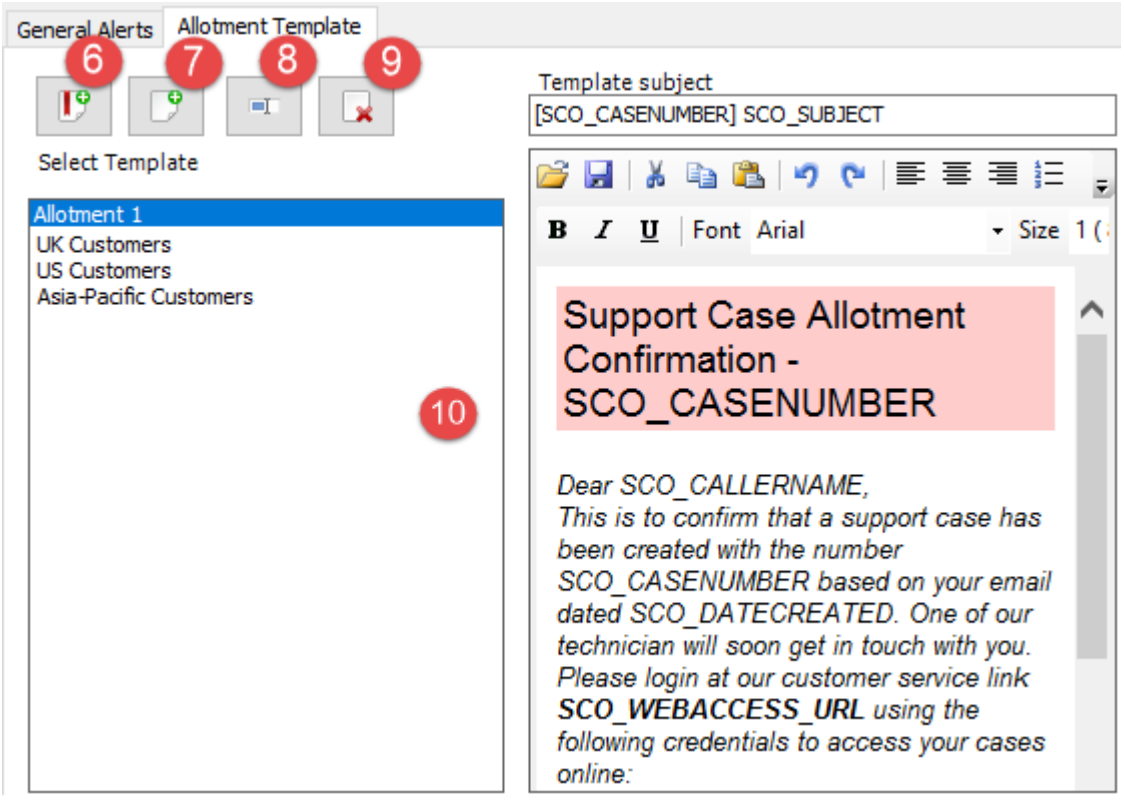
4 A list of all placeholder variables available for inserting into a particular template. In runtime (that is, when the actual email or SMS is generated from the template), the enclosed variables will be substituted by their corresponding values. The followings list all the supported variables:

Variable	Purpose
SDO_CASEDESCRIPTION	Description of the support request case
SCO_EMAILBODY	Body of the caller email
SCO_CASENUMBER	Case Number of the generated support case
SCO_SUBJECT	Subject of the email or the support case
SCO_CASEAUTHOR	The help desk staff that created/logged the support request
SCO_DATERECEIVED	Date and time the email was received
SCO_DATECREATED	Date and time the support case was created/logged
SCO_PROBLEMCATEGORY	Problem category to which the case belongs to
SCO_PROBLEMTYPE	Problem type to which the case is related with
SCO_STATUS	Status of the case with regards to the problem
SCO_EMAIL_HISTORY_LISTING	Email history listing on the current case
SCO_TIMESPENT_DESCRIPTION	Description on each time that a technician spent in working on the case
SCO_TOTAL_TIMESPENT	Total time spent (in minutes) on the case

SCO_LOGS	Log listings related to the case
SCO_NOTES	Nodes added on the case by technicians and managers
SCO_CALLERNAME	Name of the caller who had requested for help
SCO_CALLEREMAIL	Email address of the caller
SCO_CALLERPHONE	Telephone number of the caller
SCO_CALLERMOBILE	Mobile number of the caller
SCO_CALLERDEPARTMENT	Department to which the caller belongs
SCO_CALLERADDRESS	Full address of the caller
SCO_TECHNICIANS	Technicians assigned to the case
SCO_DUEDATE	Due date assigned to the case within which the case has to be resolved
SCO_PRIORITY	Priority of the case
SCO_ASSETNAME	Asset name related to the case
SCO_ASSETCOMMENTS	Comments on that particular asset
SCO_NOW	Current date and time
SCO_CUSTOMFIELD1	Custom Field 1
SCO_CUSTOMFIELD2	Custom Field 2
SCO_CUSTOMFIELD3	Custom Field 3
SCO_CUSTOMFIELD4	Custom Field 4
SCO_REPLIEDEMAILBODY	Description body of the caller replied email
SCO_REPLIEDEMAILSUBJECT	Subject of the caller replied email
SCO_WEBACCESS_LOGIN	Caller login details for web access
SCO_WEBACCESS_URL	The web URL of the Caller Web Access (CWA) site
SCO_KBBODY	Description body of the newly published KB article
SCO_KBSUBJECT	Subject of the newly published KB article
SCO_KBPROBLEMCATEGORY	Problem Category of the newly published KB article
SCO_KBPROBLEMTYPE	Problem Type of the newly published KB article
SCO_KBLINK	Outlook link of the newly published KB article clicking which will open the KB article
SCO_KBCREATEDDATE	Creation date of the newly published KB article

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

Allotment Templates



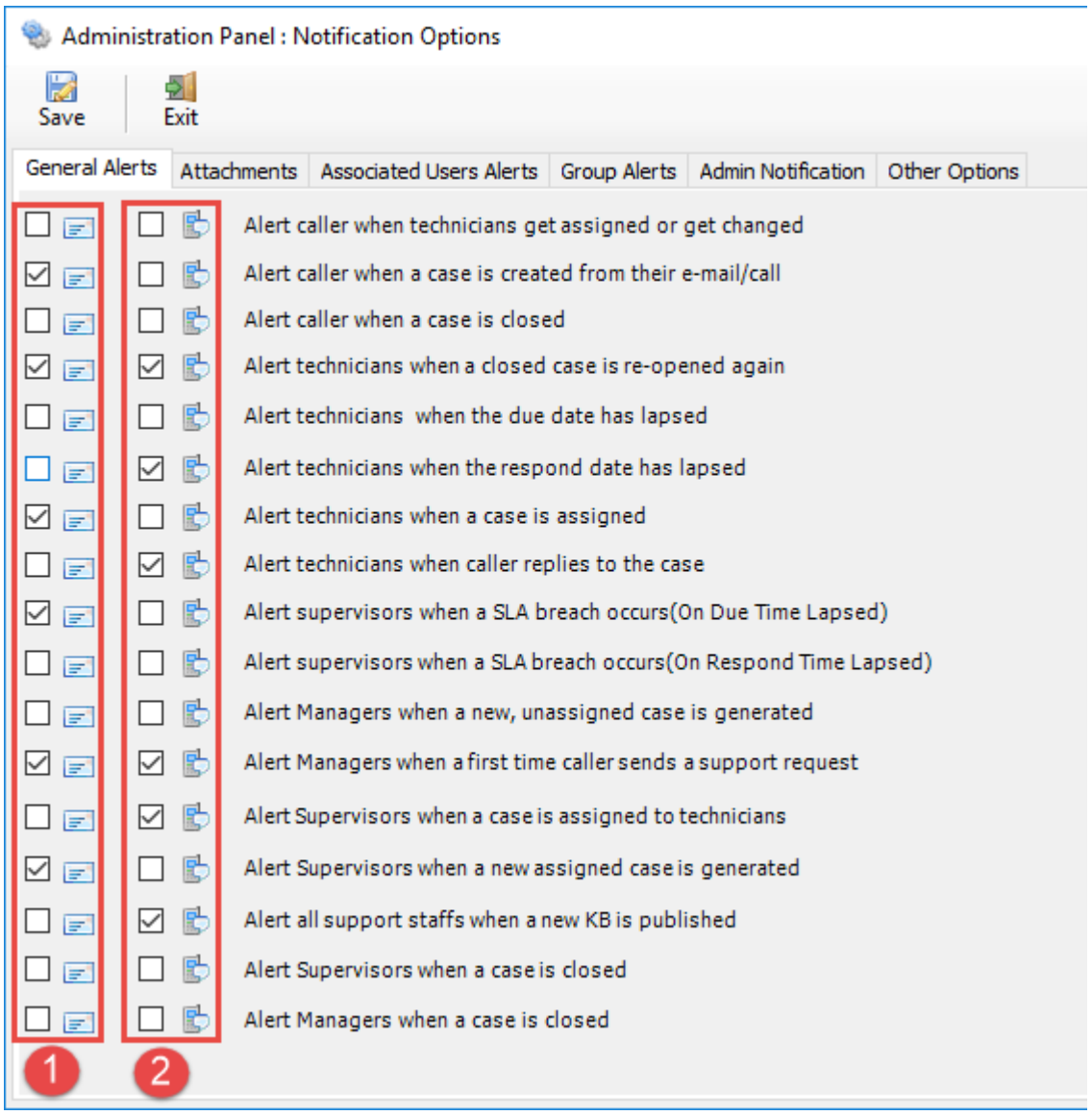
An allotment template is used for notifying caller when a case is raised from their support request. In Team Helpdesk, managers can define multiple allotment templates, so that one can choose which specific allotment auto-response to send to a particular caller. For instance, if someone sends an e-mail to UK.Support@myCompany.com, you would want to inform the customer that their e-mail will be responded to within 2 hours between 9 am and 5:30 pm GMT. If they send a new case to US.Support@myCompany.com, you can inform the customer that their e-mail will be responded to within 3 hours between 9 am and 5:30 pm EST.

6. Create a new allotment template based on default content.
7. Create a new empty allotment template.
8. Rename the selected allotment template.
9. Delete the selected allotment template.
10. List of all allotment templates available.

4.13 Notification Options

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

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



1 **Email Alerts**
Here you can enable or disable automated email notifications. To enable a particular email notification, check the corresponding box.

NOTE: To customize the template of each of the notification as per your requirement, use the Templates Manager.

2 **SMS Alerts**
Here you can enable or disable automated SMS notifications. To enable a particular SMS notification, check the corresponding box.

Automated Email Notification Samples

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

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

As soon as a support case is logged with Team Helpdesk and saved in Outlook/Exchange, a notification email is send out automatically to the caller (using a customizable template) informing about the detail of the generated case including the case number.

From: John Nash **On Behalf Of** Support
Sent: Friday, December 19, 2008 10:48 AM
To: 'Jones@angelheart.com'
Subject: Case [1973] : Troubleshooting the MacBook Air SuperDrive

Support Case Allotment Confirmation - 1973

Dear Jones,

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

Please login at our customer service website using the following credentials to access your cases online:

Weblink: http://192.168.1.4./CWS/login.aspx

Password: 4344523

Support Team

Your email:

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

Email notification to caller when technicians are assigned to their cases

A simple example is when a new case is generated, and the helpdesk manager assigns it to a new technician. As soon as it is saved and exited out of the case, Team Helpdesk automatically send out the notification email to caller (using a customizable template) informing about the assignment of the new technician. If existing technicians are changed, the same notification would trigger and the caller is updated to put on the communication loop.

From: John Nash **On Behalf Of** Support
Sent: Friday, December 19, 2008 2:21 PM
To: 'Jones@angelheart.com'
Subject: SupportCase [1973] : Troubleshooting the MacBook Air SuperDrive

New Technician assigned to your case #1973

Dear Jones,

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

Support Team

Your email:

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

Email notification to caller when a case is closed

When a technician marked a support case as fixed, it is closed and move to the 'Resolved cases' folder. At the same time, a notification email is send out automatically to the caller (using a customizable template) informing about the closure of the case.

From: John Nash **On Behalf Of** Support
Sent: Friday, December 19, 2008 11:08 AM
To: Jones@angelheart.com
Subject: SupportCase [1973] : Troubleshooting the MacBook Air SuperDrive

Support Case Closed Confirmation - 1973

Dear Jones,

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

Support Team

You wrote :

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

Email notification to assigned technicians when a case is reopened

This scenario would happen when the caller replies back to a support case that had been already marked as resolved in Outlook/Exchange. Team Helpdesk would then automatically reopen the case and sent notification email to the assigned technicians. When reopened, the particular case would be moved from the 'Resolved Cases' folder to the 'Ongoing Cases' folder.

From: Curtis Bruce **On Behalf Of** Support
Sent: Friday, December 19, 2008 3:33 PM
To: 'albert.souza@AssistMyTeam.local; 'JohnMiller@AssistMyTeam.local; 'JohnNash@AssistMyTeam.local'
Subject: SupportCase [1973] : Troubleshooting the MacBook Air SuperDrive

Click here to open case #1973 directly

Case Re-opening notification for case - 1973

Dear Albert Souza,John Miller,John Nash,

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

Support Team

Jones (Jones@angelheart.com) wrote :

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

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

This scenario would happen when the caller replies back to a support case that had been already marked as resolved in Outlook/Exchange. Team Helpdesk would then automatically reopen the case and sent notification email to the assigned technicians. When reopened, the particular case would be moved from the 'Resolved Cases' folder to the 'Ongoing Cases' folder.

From: Curtis Bruce **On Behalf Of** Support
Sent: Friday, December 19, 2008 8:50 PM
To: 'albert.souza@AssistMyTeam.local; 'JohnMiller@AssistMyTeam.local; 'JohnNash@AssistMyTeam.local'
Subject: SupportCase [1973] : Troubleshooting the MacBook Air SuperDrive

Click here to open case #307 directly

Due Date lapsed notification for case - 1973

Dear Albert Souza,John Miller,John Nash

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

Support Team

Jones (Jones@angelheart.com) wrote :

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

Email notification to technicians when a case is assigned

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

From: Curtis Bruce **On Behalf Of** Support
Sent: Friday, December 19, 2008 2:18 PM
To: 'albert.souza@AssistMyTeam.local; 'JohnMiller@AssistMyTeam.local; 'JohnNash@AssistMyTeam.local'
Subject: SupportCase [1973] : Troubleshooting the MacBook Air SuperDrive

Click here to open case #1973 directly

Support Case Assignment - 1973

Dear Albert Souza,John Miller,John Nash,

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

Support Team

Jones (Jones@angelheart.com) wrote :

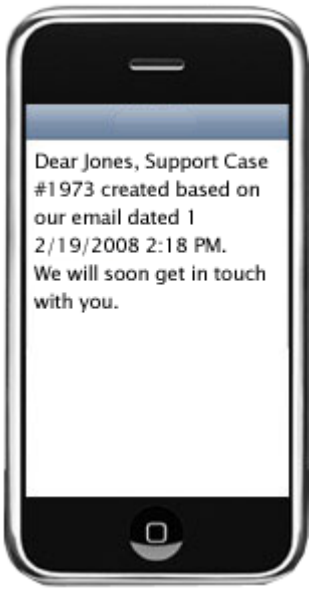
> *My MacBook won't longer write compact disc (CD). I am also hearing an irratating sound tik tick... every now and then when I play old CDs. Please help me rectify this problem as I am no longer able to work on my project. Thank your for your response.*
>
> *Jones*

Automated SMS Notification Samples

Here are few samples of automated SMS notification as send to recipients from Team Helpdesk

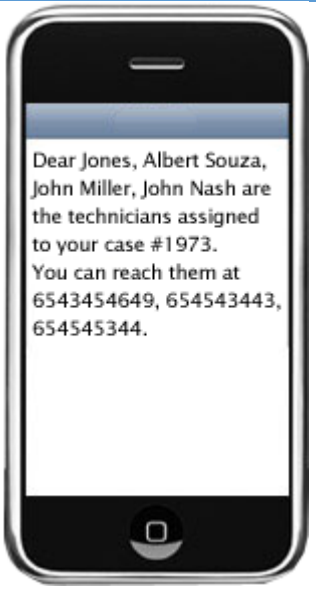
SMS notification to caller when a support case is logged from an email/call

As soon as a support case is logged with Team Helpdesk and saved in Outlook/Exchange, a notification SMS is send out automatically to the caller (using a customizable template) informing about the detail of the generated case including the case number.



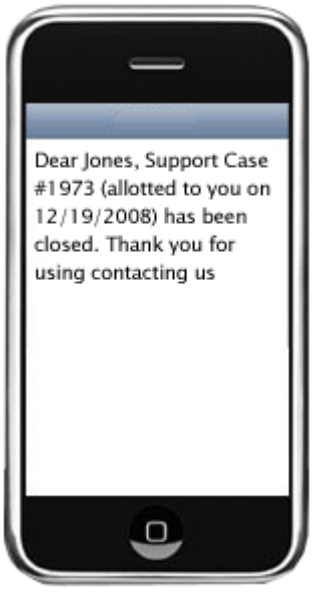
SMS notification to caller when technicians are assigned to their cases

A simple example is when a new case is generated, and the helpdesk manager assigns it to a new technician. As soon as it is saved and exited out of the case, Team Helpdesk automatically send out the notification SMS to caller (using a customizable template) informing about the assignment of the new technician. If existing technicians are changed, the same notification would trigger and the caller is updated to put on the communication loop.



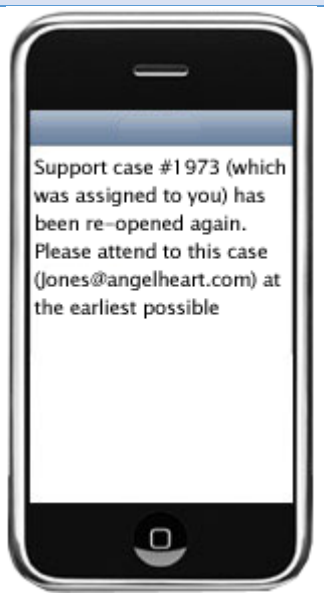
SMS notification to caller when a case is closed

When a technician marked a support case as fixed, it is closed and move to the 'Resolved cases' folder. At the same time, a notification SMS is send out automatically to the caller (using a customizable template) informing about the closure of the case.



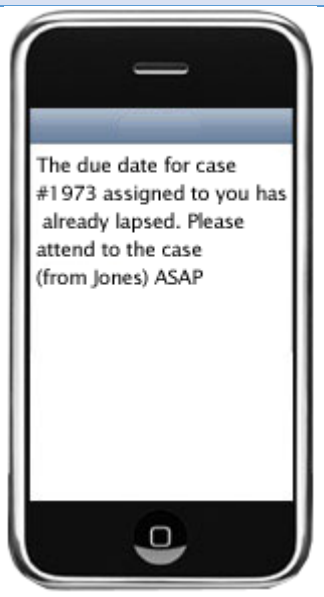
SMS notification to assigned technicians when a case is reopened

This scenario would happen when the caller replies back to a support case that had been already marked as resolved in Outlook/Exchange. Team Helpdesk would then automatically reopen the case and sent notification SMS to the assigned technicians. When reopened, the particular case would be moved from the 'Resolved Cases' folder to the 'Ongoing Cases' folder.



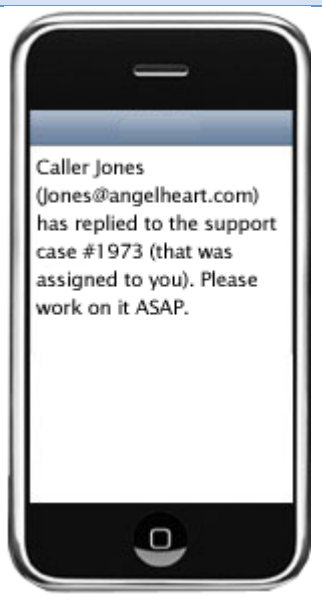
SMS notification to assigned technicians when the due date is about to lapse

This scenario would happen when the caller replies back to a support case that had been already marked as resolved in Outlook/Exchange. Team Helpdesk would then automatically reopen the case and sent notification SMS to the assigned technicians. When reopened, the particular case would be moved from the 'Resolved Cases' folder to the 'Ongoing Cases' folder.

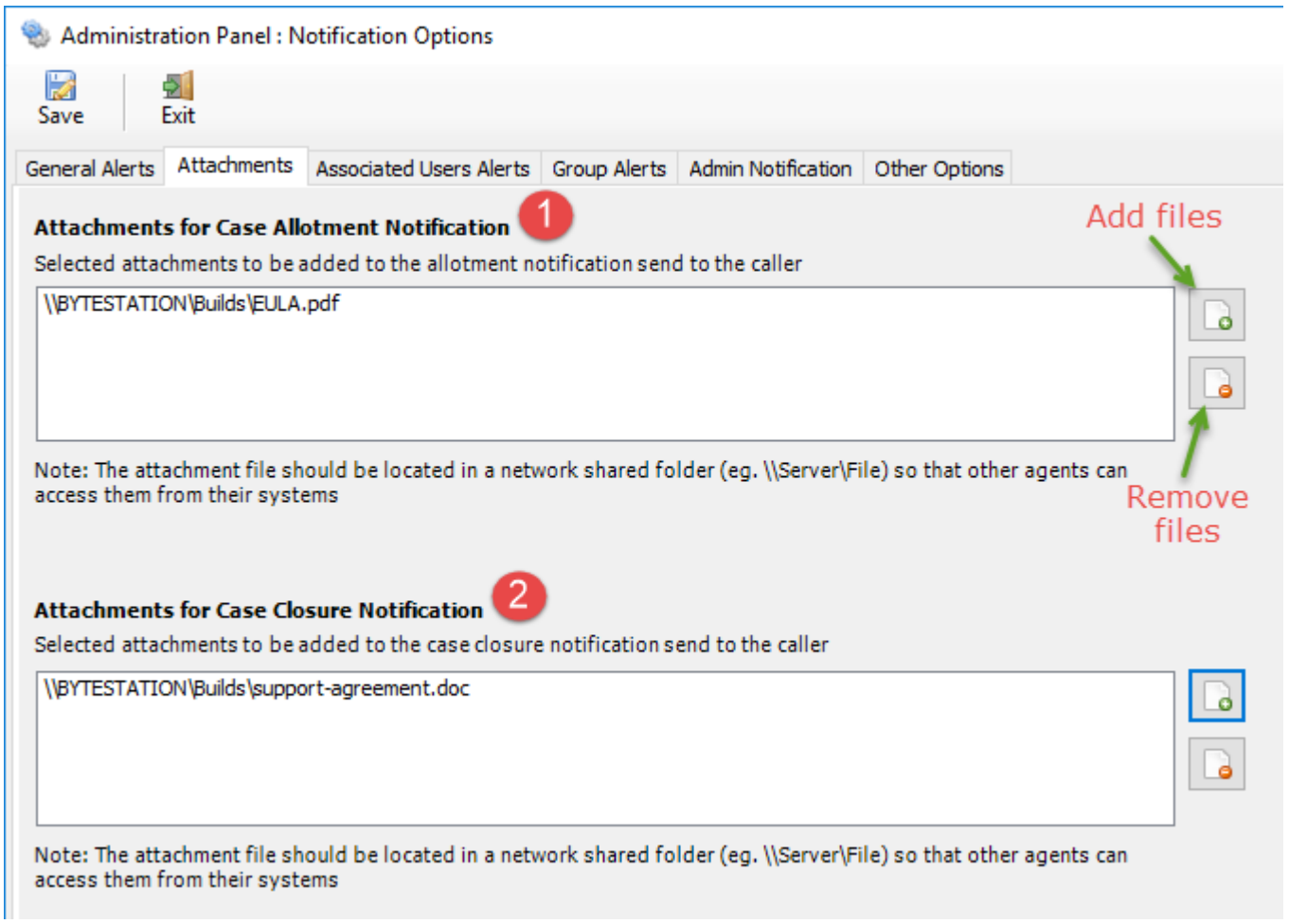


SMS notification to technicians when a case is assigned

An automatic notification SMS would be sent out to the assigned technicians when cases are assigned. This includes for technicians assigned automatically due to relationship defined between a default technician and a problem type/caller such as support request submitted via web form or when existing a caller sends an email.



Adding Attachments to automated notification emails



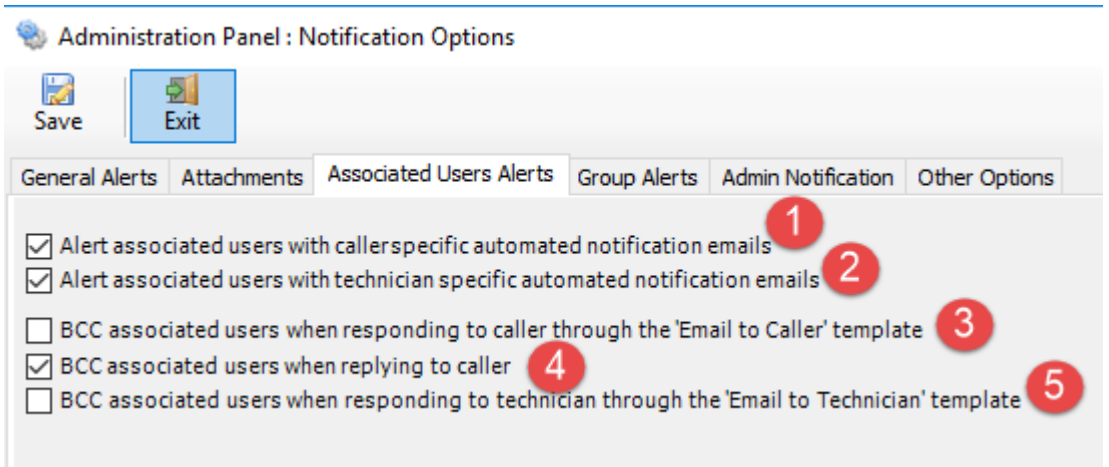
1 **Attachments to include in case allotment notification** - Often most helpdesk policy requires that certain documents such as EULA, disclaimer or Service agreements etc., are also send along with the automated email to the caller when a ticket is allotted.

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

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

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

Associated Users Alerts



Often a helpdesk may have the requirement to link certain stakeholders, apart from the caller, to a support case. These can be external vendors, contractors or secondary field technicians whose inputs or contributions are required in resolving the case. In Team Helpdesk, we refer these stakeholders as 'Associated users' and these can be added to a case, either by choosing from contacts in your Address Book (or Global Address List - GAL).

1 **Alert associated users with caller specific automated notifications**
Enable this option to also notify any associated users of a case with the same set of notifications that are send to the caller.

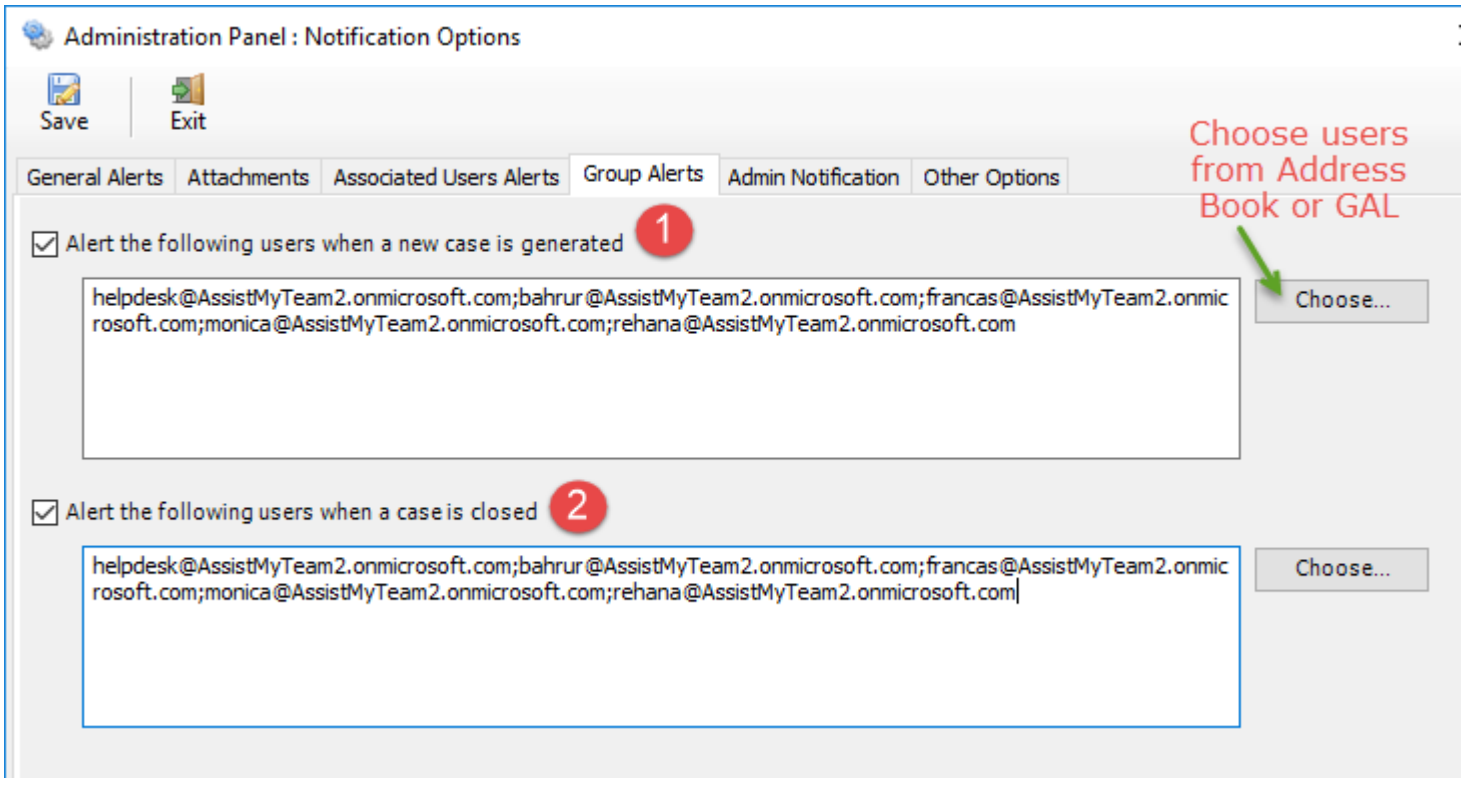
2 **Alert associated users with technician specific automated notifications**
Enable this option to also notify any associated users of a case with the same set of notifications that are send to the assigned technicians.

3 **BCC associated users when responding to caller through 'Email to Caller' template**
Enable this option so that any associated users of a case also receive a copy of the email communication that is send to the caller by the technician through the 'Email to Caller' button of the case form in Outlook.

4 **BCC associated users when replying to caller**
Enable this option so that any associated users of a case also receive a copy of the email reply that is send to the caller by the technician in Outlook.

5 **BCC associated users when responding to technician through 'Email to Technician' template**
Enable this option so that any associated users of a case also receive a copy of the email that is send to the assigned technician through the 'Email to Technician' button of the case form in Outlook.

Group Alerts



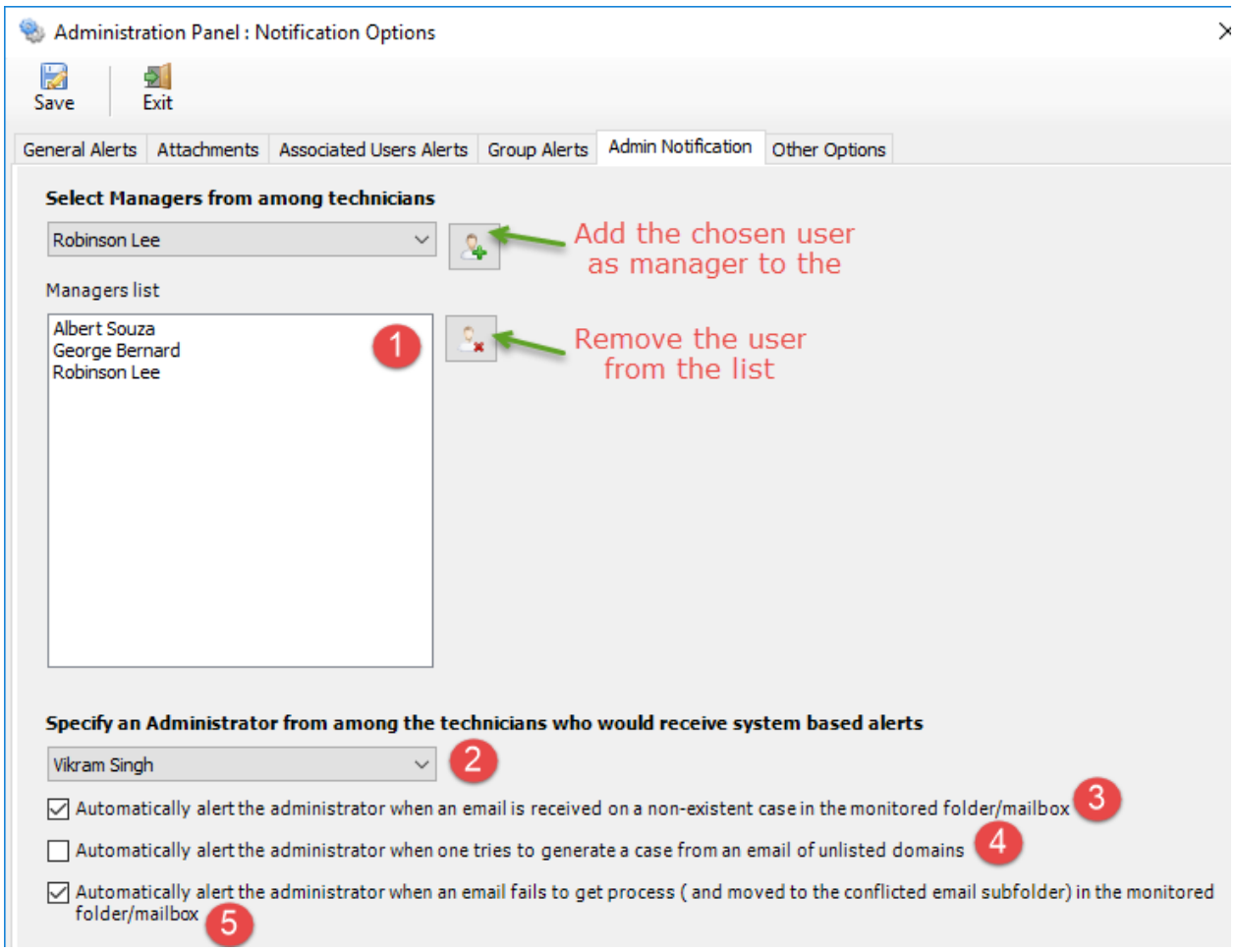
1 **Alert the following users when a new case is generated**
When enabled, with this feature, helpdesk manager can specify users or stakeholders that are to be notified once a new case is generated. Clicking the 'Choose...' button would allow selection of the contacts from the address book/Global Address lists etc.

NOTE: If multiple users are specified, each email address is separated by a semi colon.

2 **Alert the following users when a case is closed**
When enabled, with this feature, helpdesk manager can specify users or stakeholders that are to be notified when a case is completed and closed. Clicking the 'Choose...' button would allow selection of the contacts from the address book/Global Address lists etc.

NOTE: If multiple users are specified, each email address is separated by a semi colon.

Admin Notifications



1 **Managers list**
Specify technicians that will be designated as helpdesk managers and add them to the list. If defined, such managers will be notified with administrative specific alerts as well as other notifications on case.

2 **Specify an administrator from among the technicians who will receive system based alerts**
From the list of managers, choose one who will receive these three system alerts (3), (4), (5).

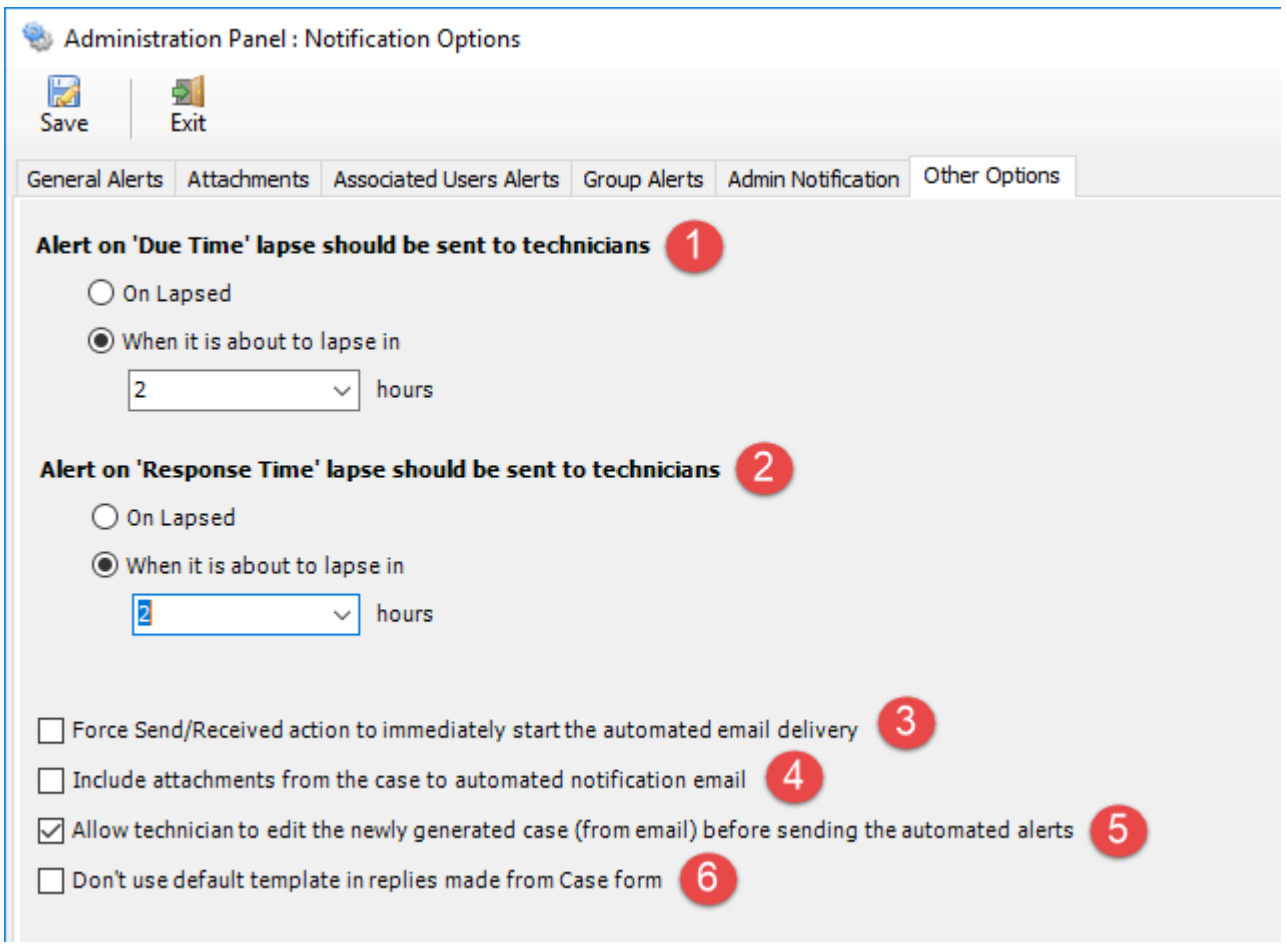
3 **Automatically alert the administrator when an email is received on a non-existent case in the monitored folder/mailbox**
Enable this option so that helpdesk add-in can send a notification to the administrator informing about a non-existent case, when a reply to a non-existent case is received from the caller in the monitored list of folders/mailboxes.

4 **Automatically alert the administrator when one tries to generate a case from an email of unlisted domain**
Enable this option so that helpdesk add-in can send a notification to the administrator if a technician tries to raise a new case from an email that is not from the administrator approved list of domains.

NOTE: Approved domains can be defined under *Team Helpdesk Manager > Callers List > Company* tab

5 **Automatically alert the administrator when an email fails to get processed (which then is moved to the conflicted email subfolder)**
Enable this option so that helpdesk add-in can send a notification to the administrator when it failed to create a case from an email, or failed to add a reply from the caller to the associated case.

Configure Alerts Workflow



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

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

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

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

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

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

3 **Force Send/Receive action to immediately start the automated email delivery**
When this is enabled, the add-in will bypass the Outlook queue to immediately start delivering any automated email notifications. Only use this feature if your Outlook is taking time to deliver emails from the Outbox.

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

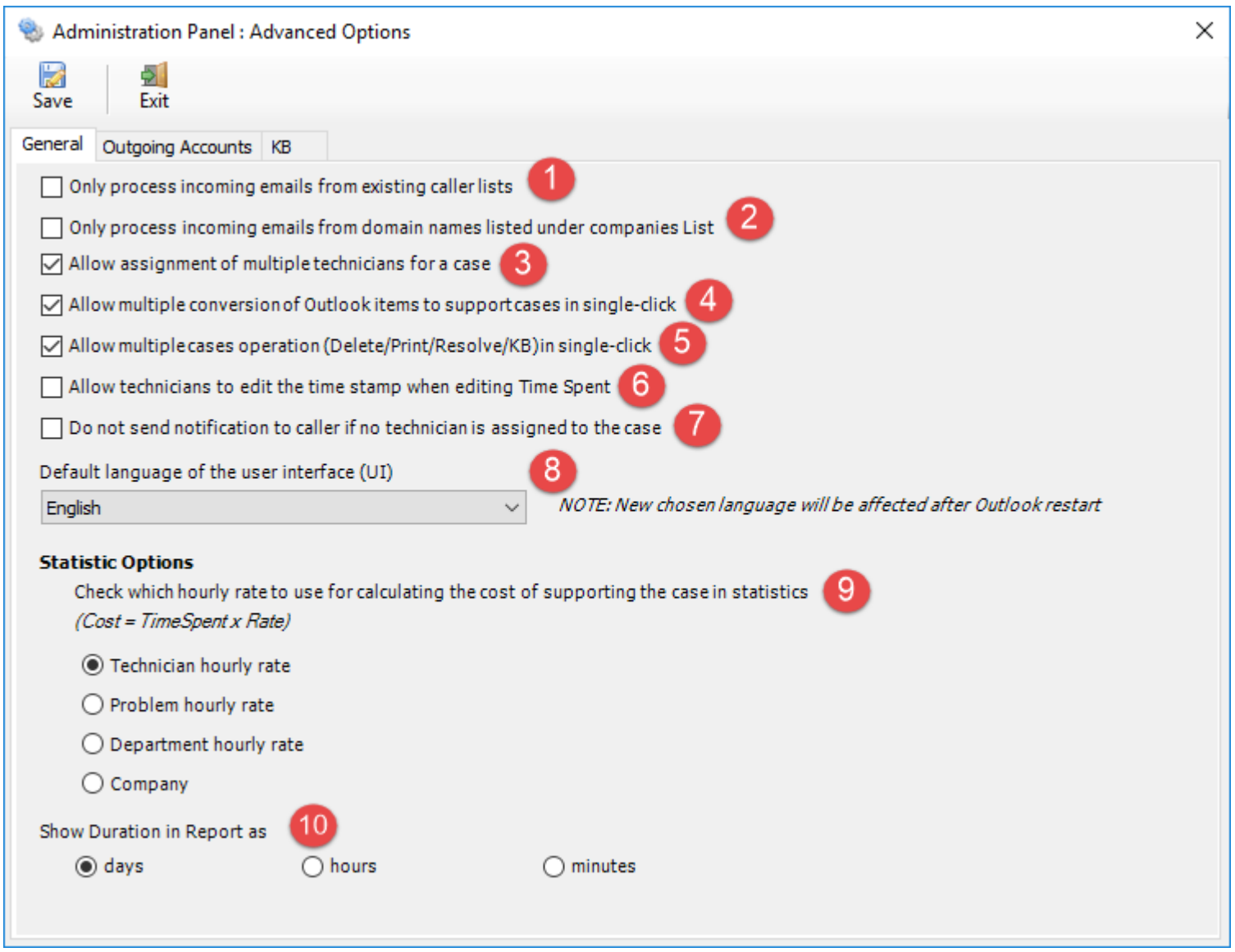
5 **Allow technician to edit the newly generated case (from email) before sending the automated alerts)**
By default, when generating a case from an e-mail (through the 'Convert to Case' button), the add-in assigns a new ID and accordingly, the allotment and technician notification e-mails are sent instantly.

However, if your helpdesk workflow requires that the technicians add more information to the new case, like an attachment or caller address etc., before the add-in can send out the automated notifications, you can enable this option. When enabled, the helpdesk add-in would display the newly generated case instantly allowing the technician to alter/add information such as custom fields, attachments or assigning it to another technician, for example. Only when the technician clicks 'Save' button, the add-in will assign a new ID and send out the notification to the caller/assigned technicians.

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

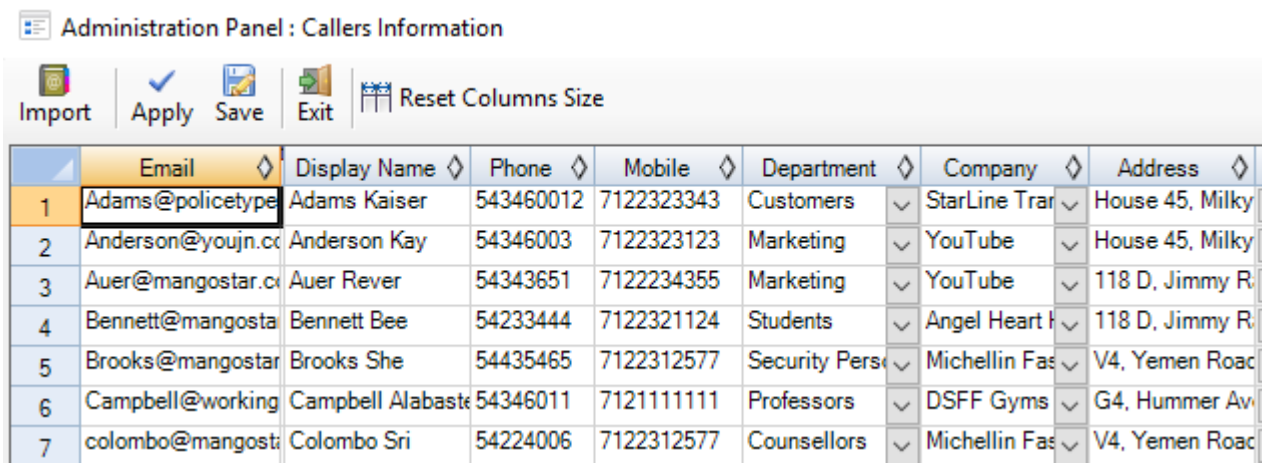
4.14 Advanced Options

With the advanced options, helpdesk administrators can control and streamline how technicians interact and complete cases in Outlook.



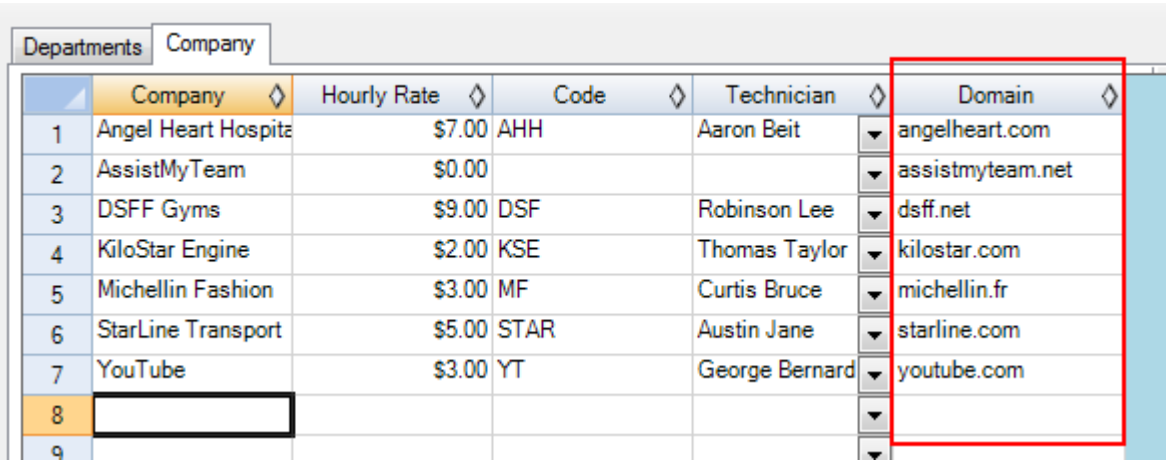
1 **Only process incoming emails from existing caller lists**
Check this option to only process support requests coming from callers that already existed in the Team Helpdesk callers list. Any emails from outside the caller list are simply ignored by the add-in. For monitored folders and mailboxes, emails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

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



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

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



Departments | Company

	Company	Hourly Rate	Code	Technician	Domain
1	Angel Heart Hospita	$7.00	AHH	Aaron Beit	angelheart.com
2	AssistMyTeam	$0.00			assistmyteam.net
3	DSFF Gyms	$9.00	DSF	Robinson Lee	dsff.net
4	KiloStar Engine	$2.00	KSE	Thomas Taylor	kilostar.com
5	Michellin Fashion	$3.00	MF	Curtis Bruce	michellin.fr
6	StarLine Transport	$5.00	STAR	Austin Jane	starline.com
7	YouTube	$3.00	YT	George Bernard	youtube.com
8					
9					

So, when you or other technicians try to generate a new case from an email send from an unlisted domain, Team Helpdesk would not process and instead a popup message would be shown that the email sender domain is not trusted. And if Team Helpdesk Manager add-in was monitoring a mailbox (support account for example), and when a new email is received from unlisted domains (e.g., not in the *Team Helpdesk Manager > Company list*), the email would be moved to a subfolder called 'Unlisted Domain Emails' for your references.

3 **Allow assignment of multiple technicians to a case**

Enable this option to allow assignment of a support case to multiple technicians so that each technician can chip in and contribute to the resolution of the issue. By default, only a single technician is allowed per case.

4 **Allow multiple conversion of Outlook items to support cases in a single click**

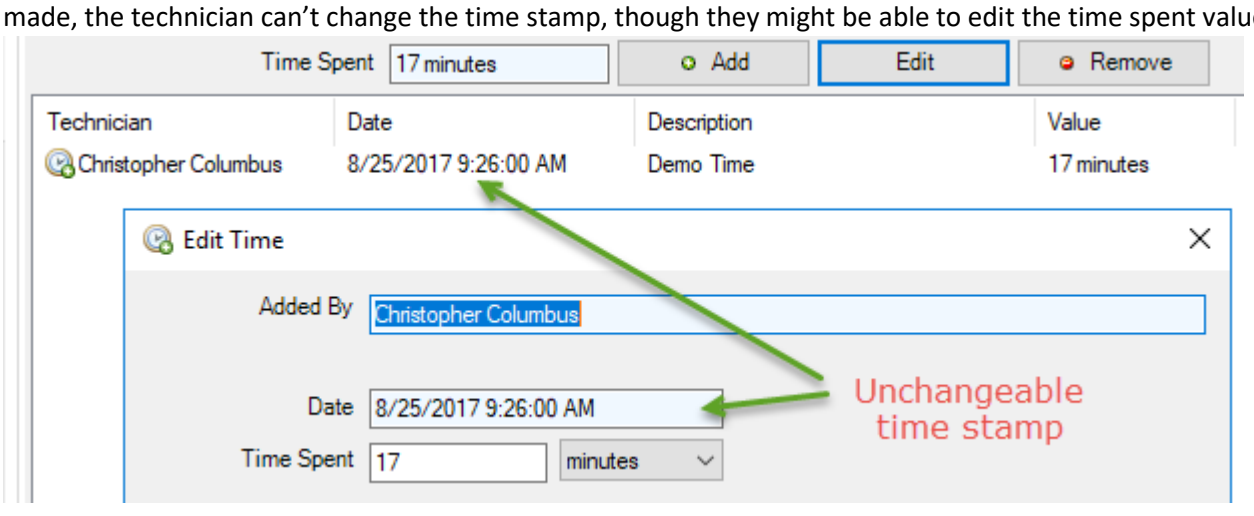
To increase productivity, this option enables a technician to convert multiple selected Outlook items such as emails, appointments or tasks to support request cases in a single-click. Use the **'Convert to case'** button to achieve this. By default, Team Helpdesk processes a single email to support case,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

5 **Allow multiple cases operation (Delete/Print/Resolved/Create KB) in a single click**

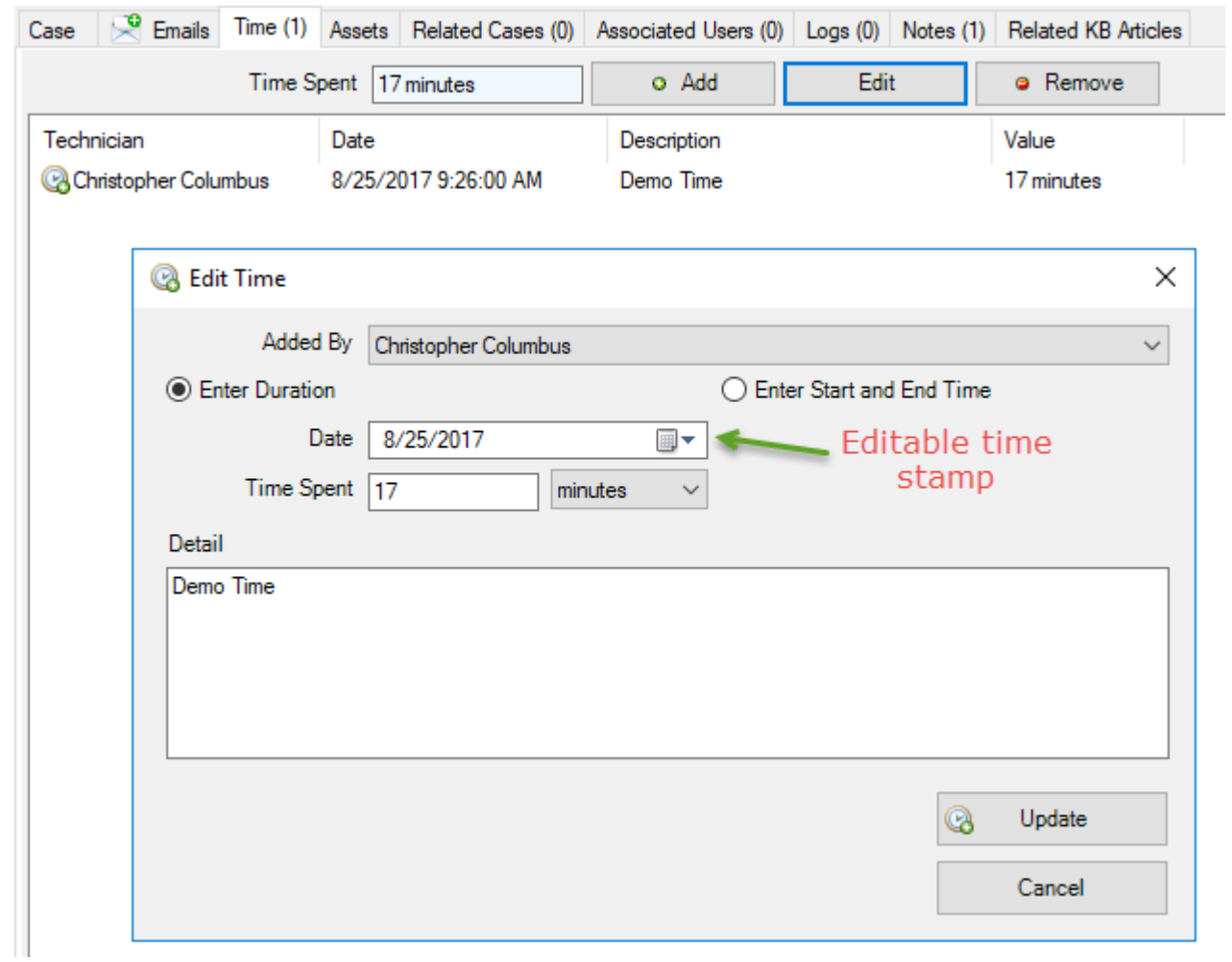
This option enables a technician to batch-process any support case specific operations such as marking as resolved, deleting, printing, re-opening etc. on multiple support cases. By default, Team Helpdesk processes a single support case when such operation is initiated.

6 **Allow technicians to edit the time stamp when editing time spent**

By default, the time stamp of any time spent entries made in a case by technicians are read-only. That is, once a entry is made, the technician can't change the time stamp, though they might be able to edit the time spent value.



But if you want to allow your technicians to edit the time stamp of the time spent entries made on cases too, enable this option. And the 'Edit Time' dialog box will allow technicians to pick a date and override the existing one.



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

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

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

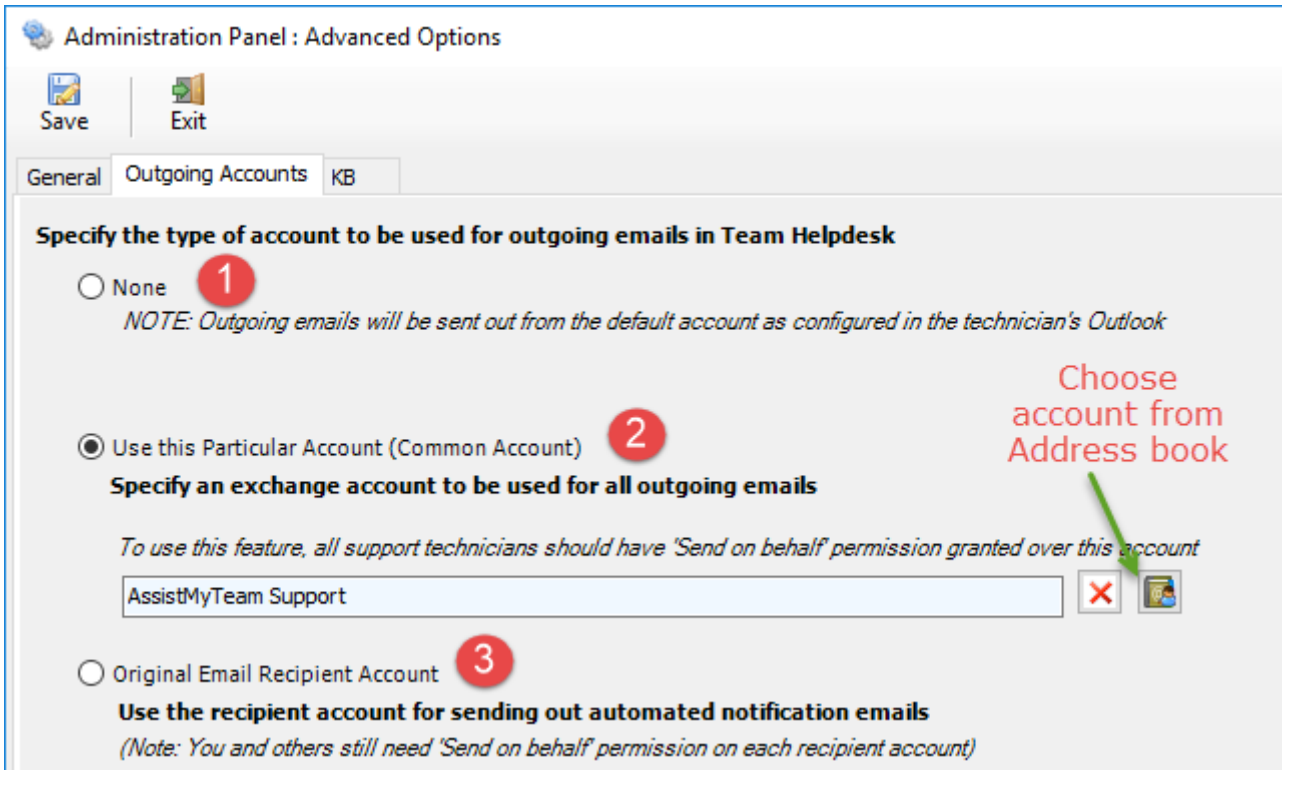
NOTE: This setting will only take into effect once your restart Outlook.

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

NOTE: To add or modify the hourly rate, refer below
For technician rate: *Team Helpdesk Manager > Technicians List > Hourly rate*
For problem rate: *Team Helpdesk Manager > Problems List > Categories*
For department rate: *Team Helpdesk Manager > Callers List > Departments*
For Company rate: *Team Helpdesk Manager > Callers List > Companies*

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

Configuring Outgoing Accounts

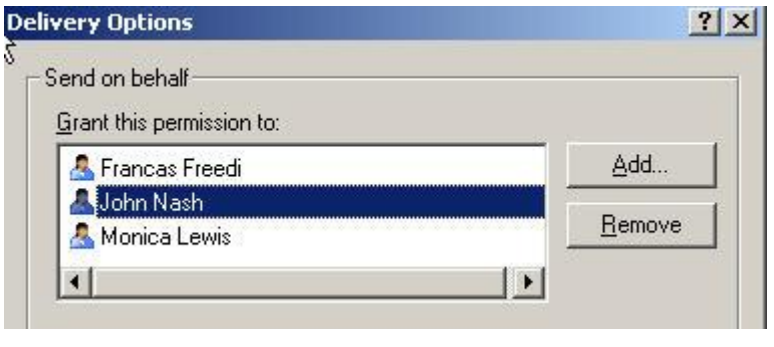


In *Team Helpdesk Manager > Advanced Options > Outgoing Accounts* tab, you can specify which mailbox account would Team Helpdesk add-ins use to send out the automated notification alerts and replies to callers and technicians.

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

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

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*.



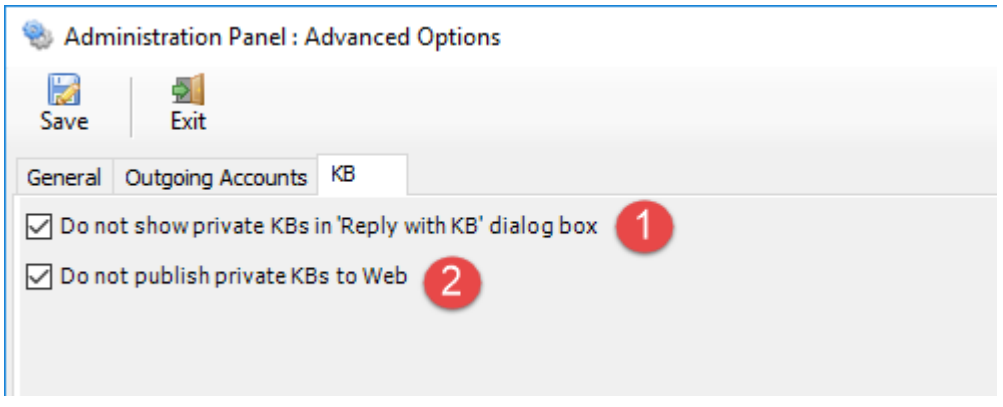
When both 'Send As' and 'Send Behalf of' are enabled, the add-in will try to use the 'Send As' permission as first preference. If that fails, it will fall back to using 'Send behalf of'.

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

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

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

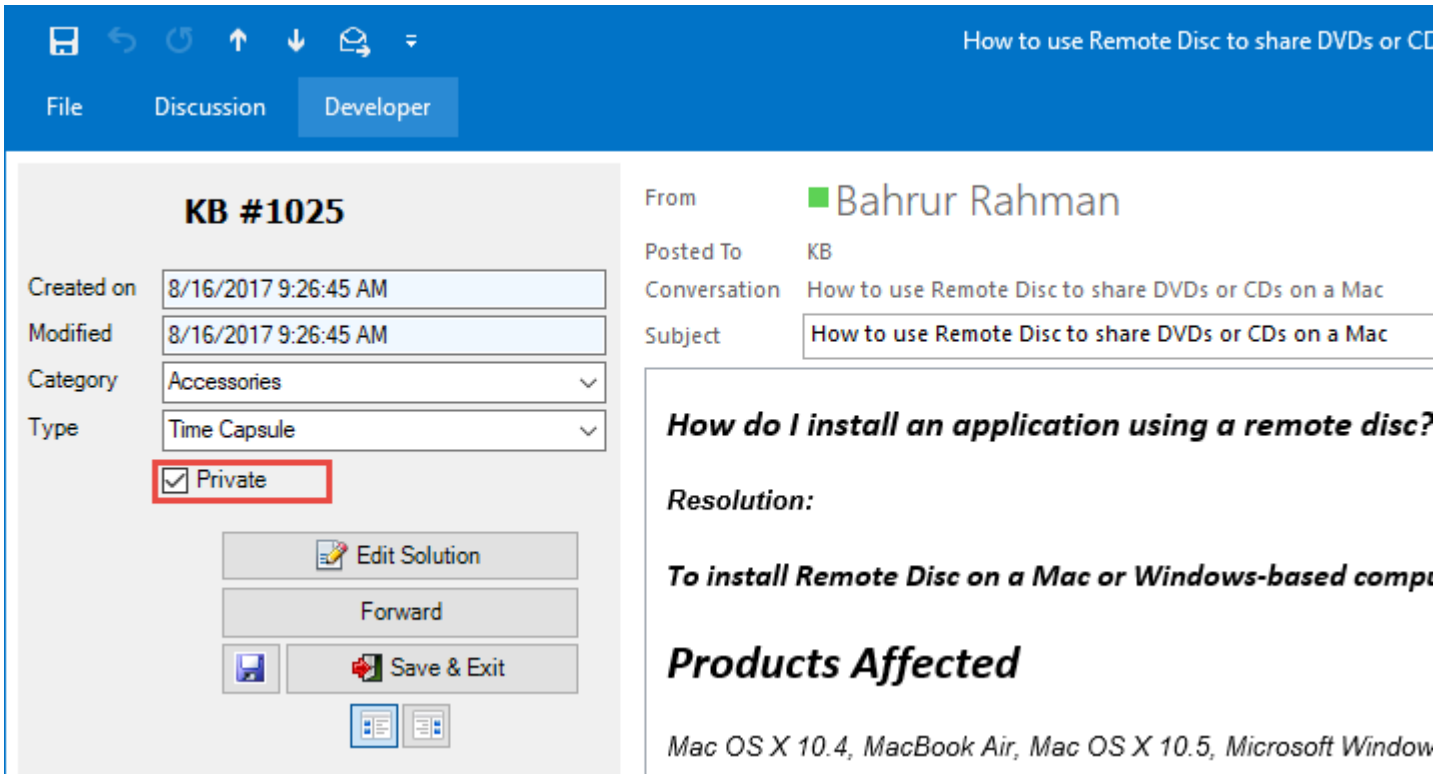
KB Settings



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

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

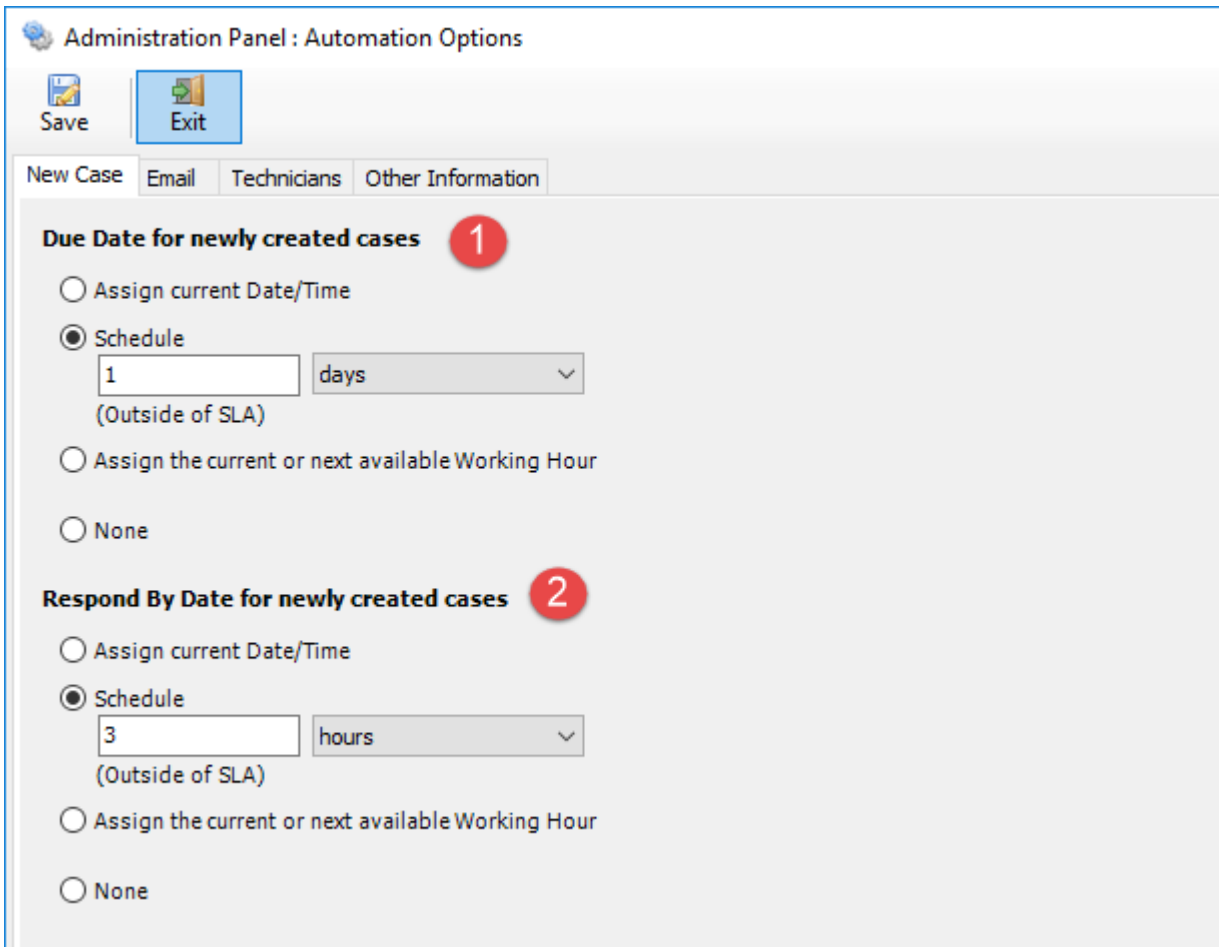
NOTE: 'Reply with KB' option button is located under Outlook > Helpdesk toolbar in your Inboxes.



2 **Do not publish private KBs to Web**
Enable this option to exclude private KB articles from being published to the online KB module of Customer Web Service (CWS) site.

4.15 Automation Options

With the Automation Options, administrators can configure the helpdesk system for on-the-fly assignment of technicians and due dates on new cases, set email processing workflow, add reminders to technician's calendar – and increase productivity of the helpdesk.



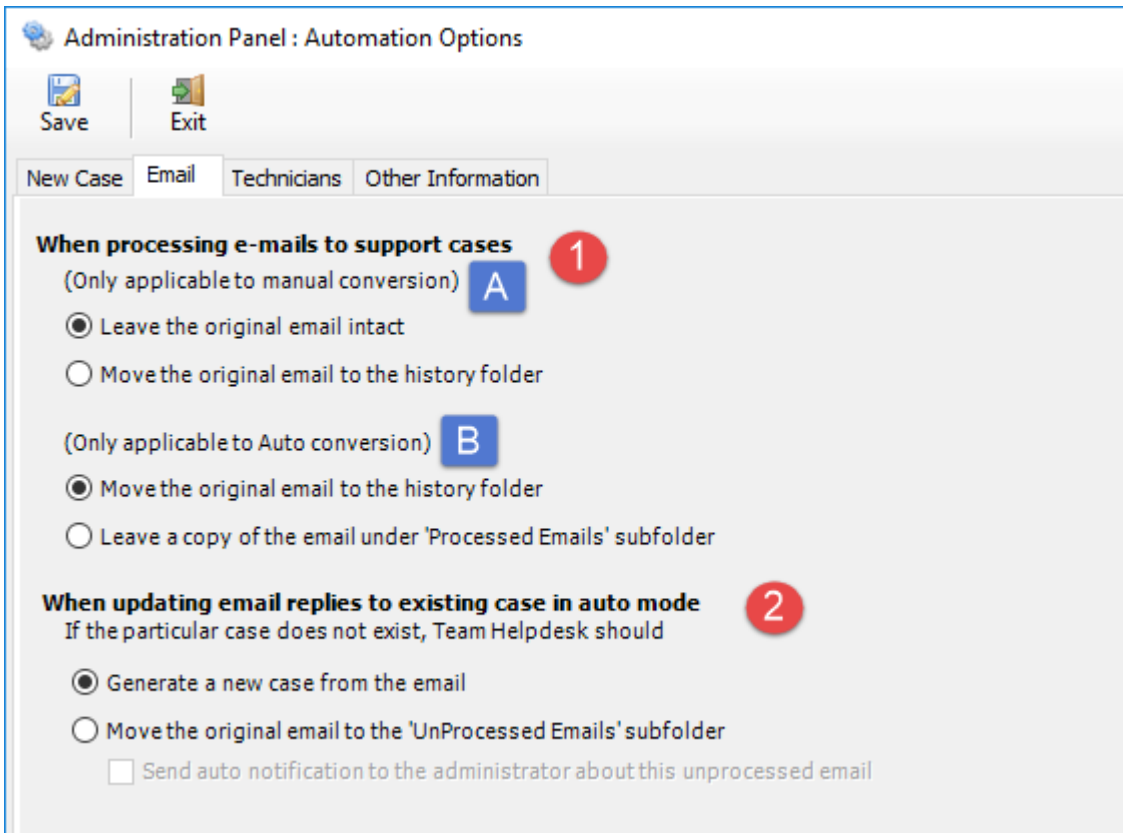
1 **Due Date for newly created cases**
Specify how the due date of newly created support cases should be assigned.

a) Assign current Date/Time – Choose this option to set the current date/time (e.g., same as when the case was created)
b) Schedule – Choose this option to schedule ahead it. You need to input the number of hours or days that will be scheduled ahead for the due date of the new case
c) Assign the current or next available Working Hour – Choose this option to dynamically seek the next available working hour (as per helpdesk availability e.g., starting and closing hours).
d) None – Choose this option to have empty due date on the new case.

2 **Respond by date for newly created cases**
Specify how the respond by date of newly created support cases should be assigned.

a) Assign current Date/Time – Choose this option to set the current date/time (e.g., same as when the case was created)
b) Schedule – Choose this option to schedule ahead it. You need to input the number of hours or days that will be scheduled ahead for the due date of the new case
c) Assign the current or next available Working Hour – Choose this option to dynamically seek the next available working hour (as per helpdesk availability e.g., starting and closing hours).
d) None – Choose this option to have empty due date on the new case.

Configure Email post processing workflow



1 A Once a case is raised from an email using the '*Convert to Case*' button (Manual conversion), choose if you want to move the original email or its copy (from which the support requests were logged from) to the Team Helpdesk Email History folder. If you want to preserve a copy of the support request email in the Inbox permanently, choose the first option '**Leave the original email intact**' so that you and others will continue to have access to that email.

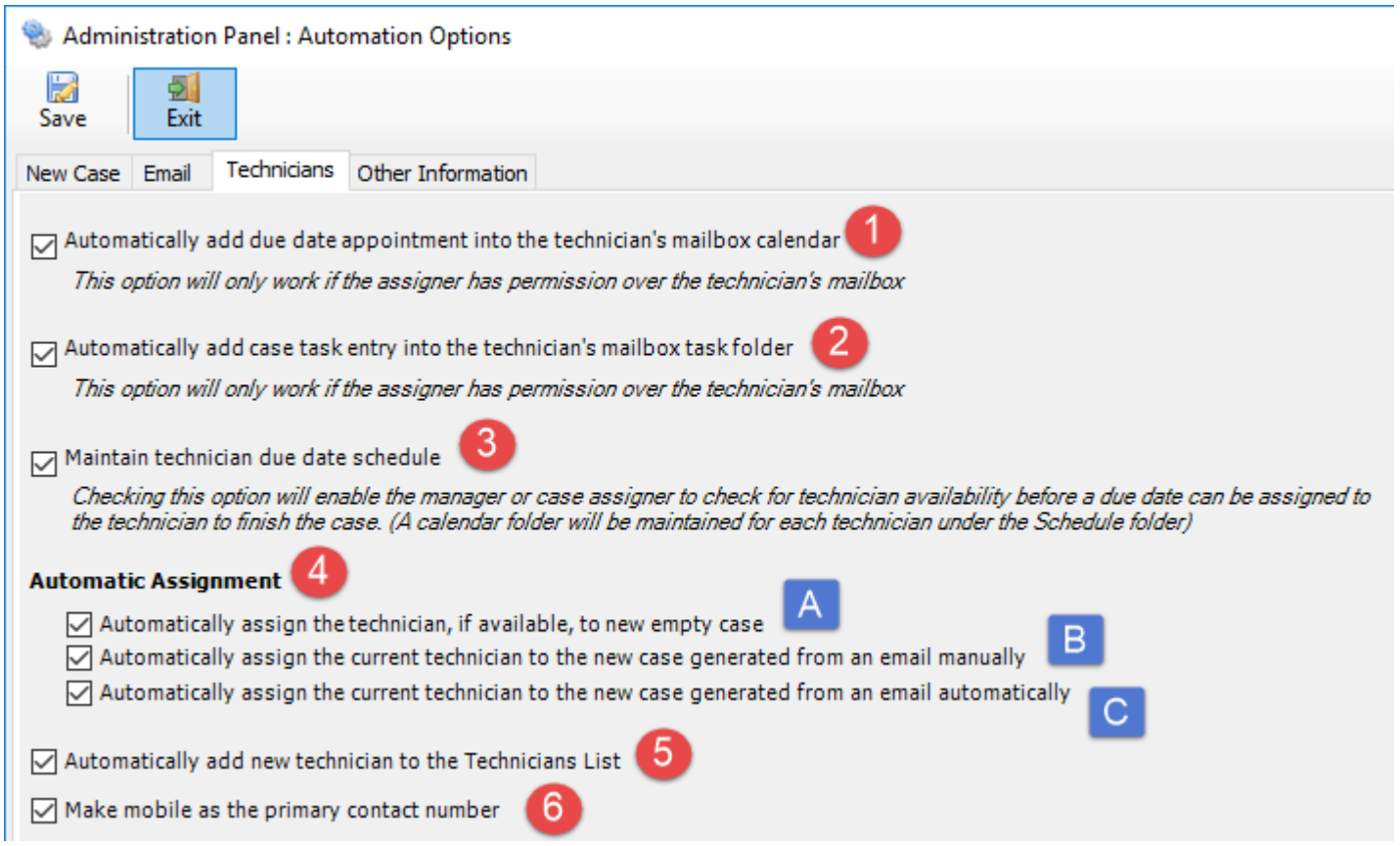
B If the case was raised *automatically* from an incoming email in a monitored Inbox, choose if you want to move the original email or its copy (from which the support requests were logged from) to the Team Helpdesk Email History folder. If you want to preserve a copy of the support request email in a subfolder permanently, choose the second option '**Leave a copy of the email under 'Processed Emails' subfolder**' so that you and others will continue to have access to that email.

2 When the helpdesk add-in encounters an email from the caller (that contains a Case ID in the subject), and if the particular case ID does not exist in Team Helpdesk Ongoing/Resolved Cases folders (say, it was deleted permanently, specify the alternative option the helpdesk add-in should do with that particular email.

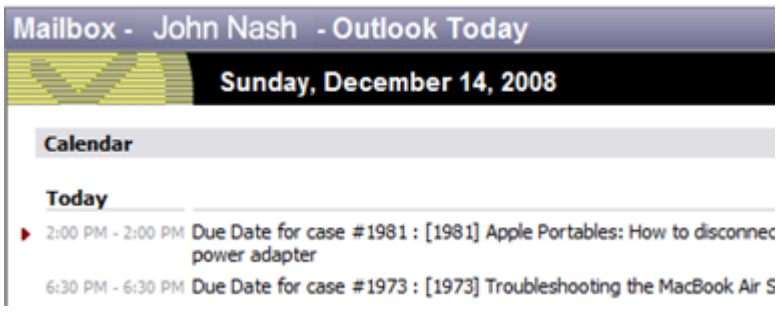
Choose '**Generate a new case from the email**' (first option) so that the add-in will ignore the reference of the non-existent/invalid case ID and instead raise a new case from the email to generate a new case ID.

Choose the second option, to configure the add-in to move the email that contains the invalid Case ID reference to the *'Unprocessed Emails'* subfolder. And administrators can later on decide what to do and deal with it. Additionally, you can also allow the add-in to send an auto alert to the administrator informing about this email with invalid ID.

Technicians Workflow

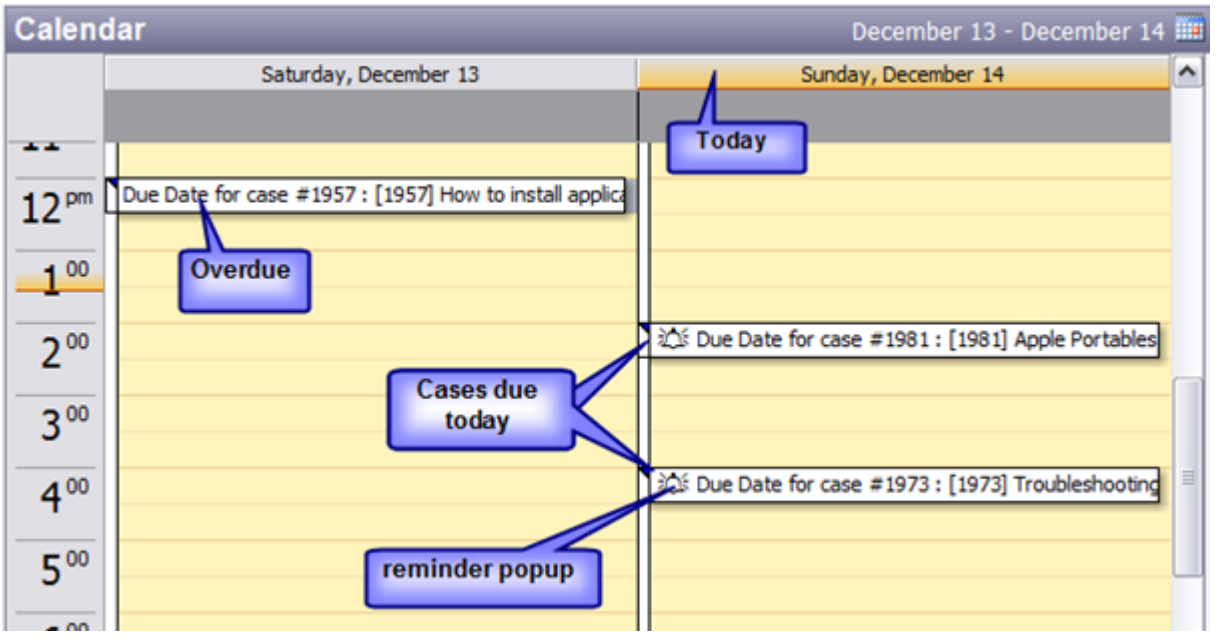


1 Enables Team Helpdesk to add/update an appointment into the concerned technician's mailbox calendar when the helpdesk managers assign/change the due date on a support case. Any change in the due date of that case at a later stage will be automatically updated to the existing appointment in the mailbox.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

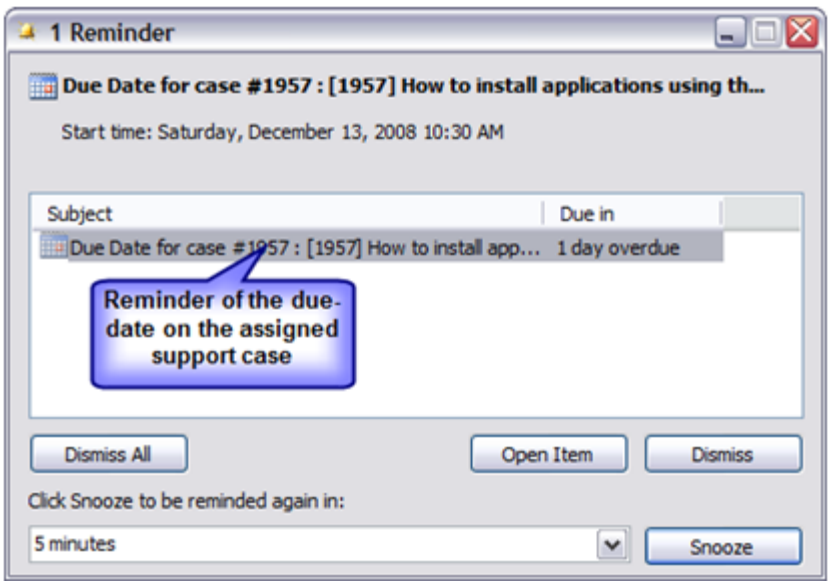


The Team Helpdesk due date appointments appear in summarized form on the main 'Outlook Today' page when the technician starts Outlook. This way, the technician gets to know which new cases are being assigned to him/her

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

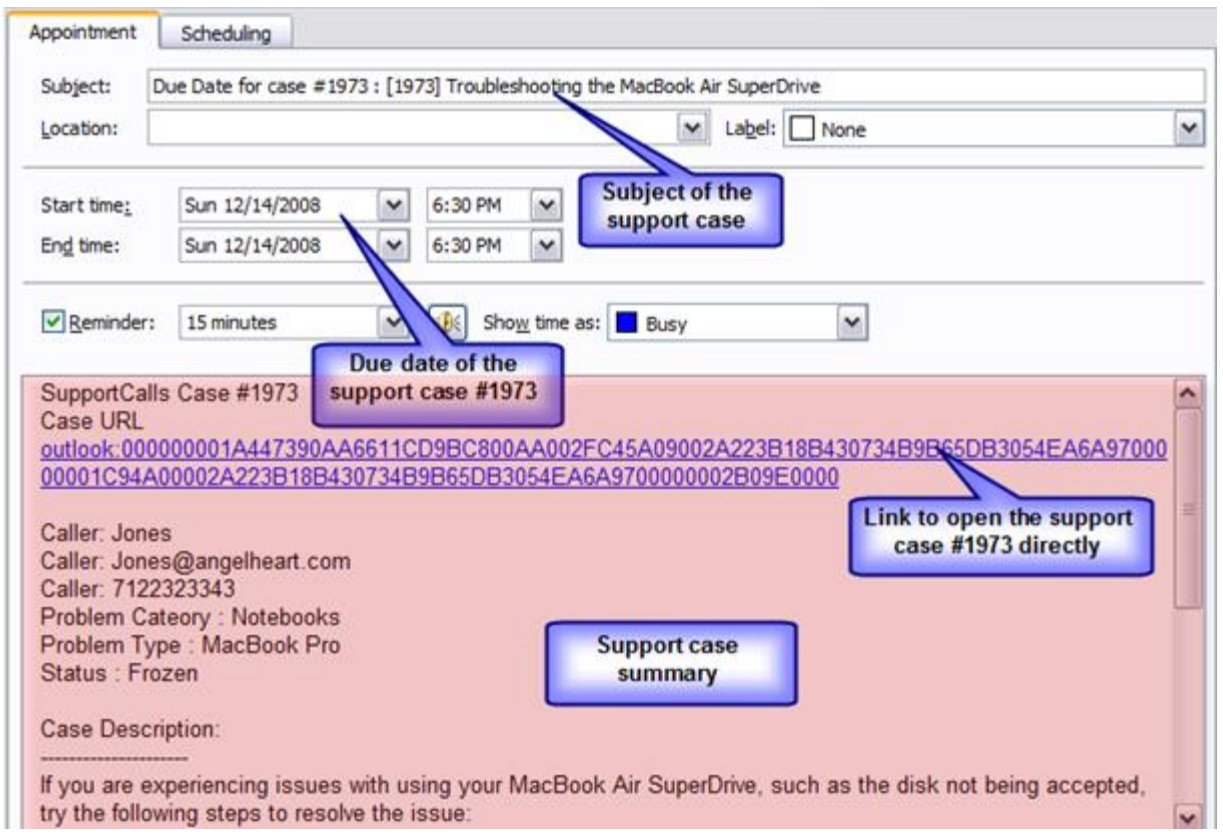


When the due date appointments are about to be overdue, Outlook automatically displays reminders popup to the technician. This way, the technician is alerted about the pending cases which need his/her attention.

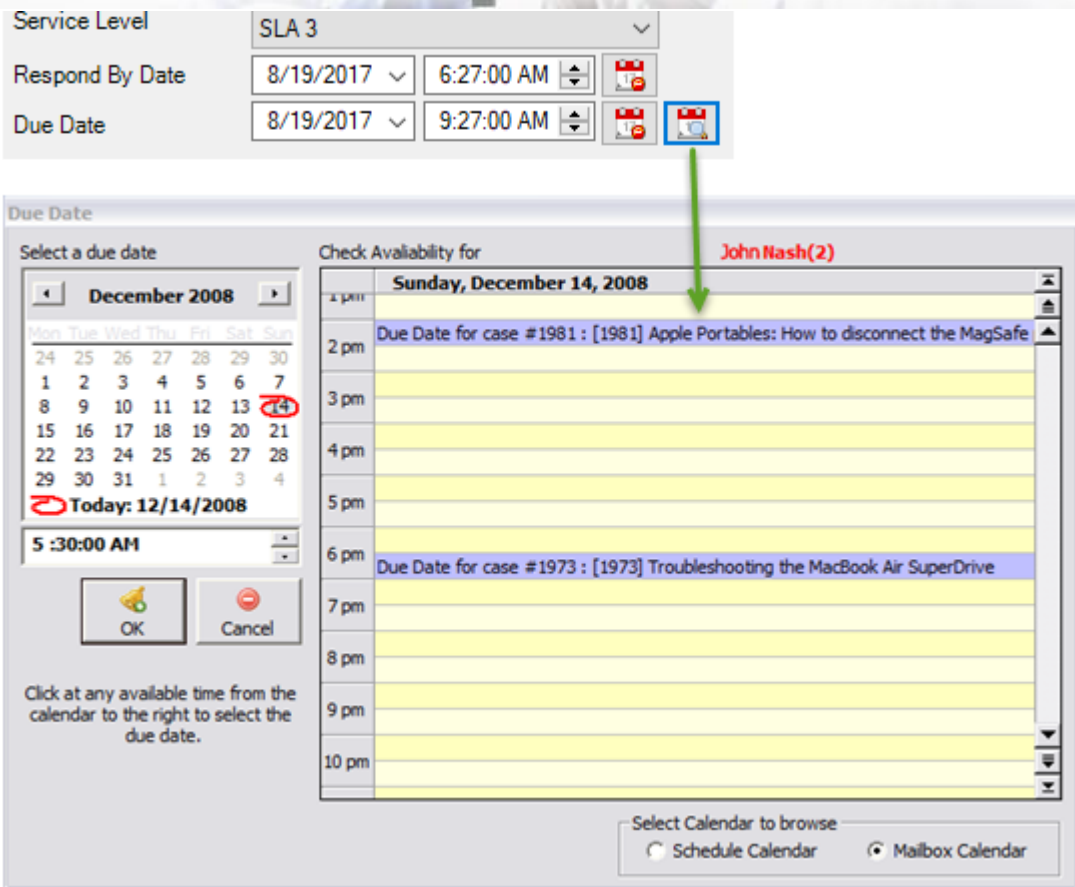


The details of a due date appointment added from Team Helpdesk to the technician's mailbox calendar:

- *the case number and case subject are available in the appointment' subject*
- *the due date of the case is the same as that of the start time and end time of the appointment*
- *In the appointment description field, there is a link to the actual case, clicking which would open the case from the Team Helpdesk 'Ongoing cases' folder.*
- *The appointment description also informs the technician about the caller, and a summary of the problem*



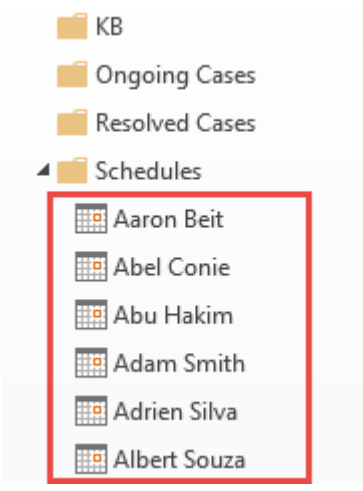
Enabling this option also allows helpdesk managers and other technicians (provided they have permission to access your mailbox) to lookup your personal calendar so that the helpdesk manager can assign a particular due date on which you are available to work on the case.



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

3 Enables Team Helpdesk to maintain a schedule calendar for each technician such that all due date of support cases is listed in corresponding calendar (bearing the technician's name).

When due dates are assigned or changed in support cases, appointments are added or updated in these calendars. The purpose of these calendars is to allow helpdesk managers or other technicians to lookup these calendars for a suitable schedule such that the assignment of due date take into the consideration other assignments which may already existed for that particular technician. This will help prevent due date clashes and increase efficiency of the helpdesk staffs.



4 A Enable this option if you want Team Helpdesk to automatically assign the default technician (specified for a particular caller in the callers list) to a support case (which is logged from an email sent by a caller that exists in the Team Helpdesk callers list). By default, this option is enabled.

B Enable this option if you want Team Helpdesk to auto-generate a random password for any addition of a new caller to the callers list. By default, this feature is enabled.

C Enable this option if you want Team Helpdesk add-in to automatically assign the current technician to the new case generated from an email automatically

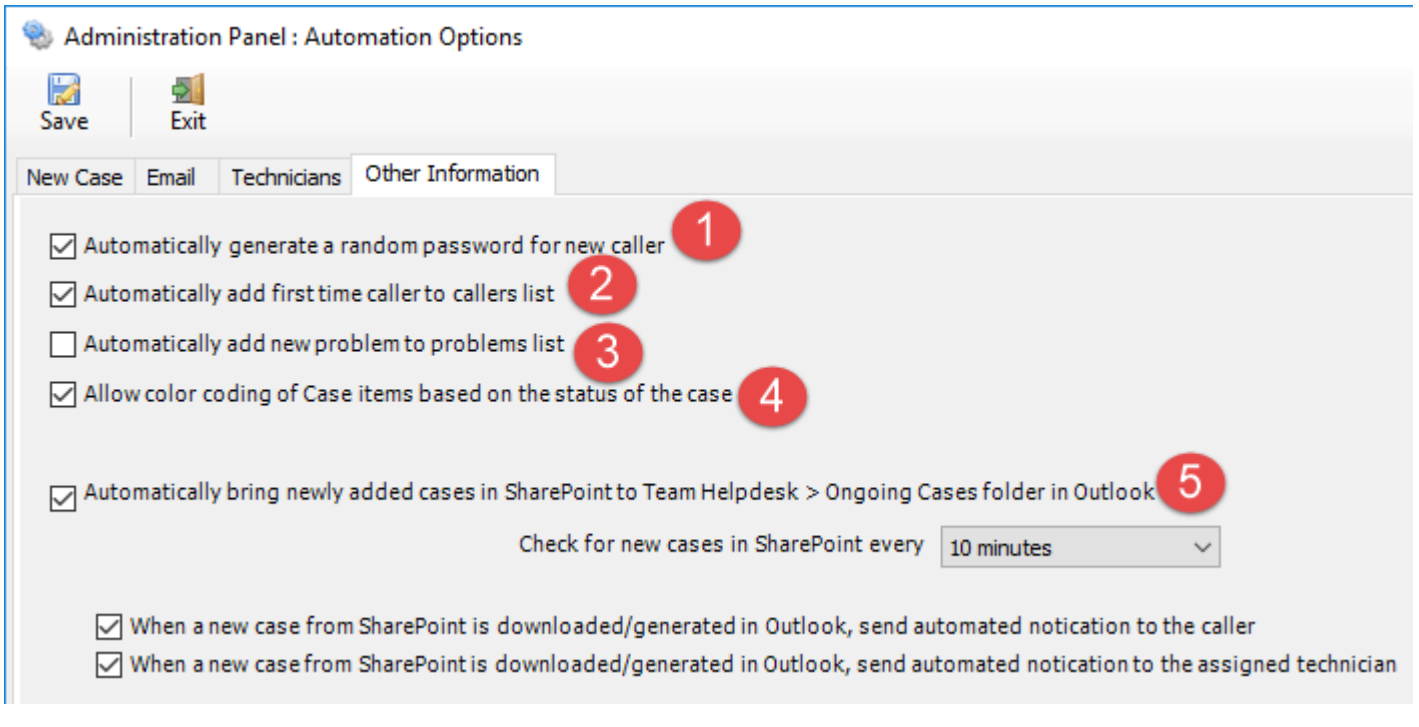
5 **Automatically add new technician to the Technicians List**
Enable this option to auto add first time new technician to the Technicians List of the helpdesk database.

6 **Make Mobile as the primary contact number**

Enable this option to force helpdesk add-in to use mobile number of the technician (over phone) when dialing calls to technicians from the case form or Team Helpdesk contact manager panel.

NOTE: This is applicable only if each technician had enabled phone calls with Skype in *Outlook > Team Helpdesk toolbar > Settings > Personal Settings > General* tab.

Other Automation Settings



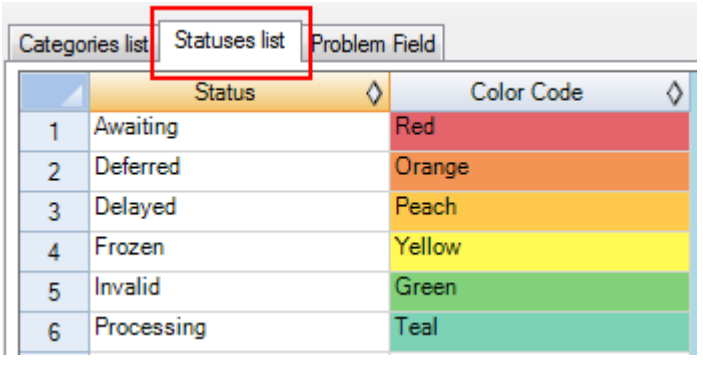
1 **Automatically generate a random password for new caller**
If enabled, when a new, first-time caller is encountered, the helpdesk add-in will automatically generate a random password for Caller Web Access website for that new caller before adding that caller to the Team Helpdesk > Callers List.

NOTE: The Caller Web Access (CWA) site, which is a part of the Customer Web Service (CWS) site, requires a user credential for caller to access their support cases online. Helpdesk managers can define this credential (e.g. password) in the Team Helpdesk Callers list dialog.

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

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

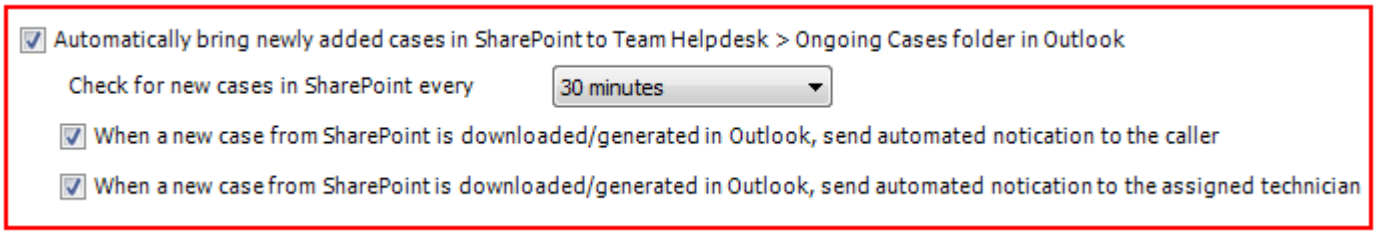
4 **Allow color coding of case items based on the status of the case**
If enabled, when you set the status of the case or when the add-in does that automatically using the default status values set for various events, you will see that the categories column of the case item has color-coded status (which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



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

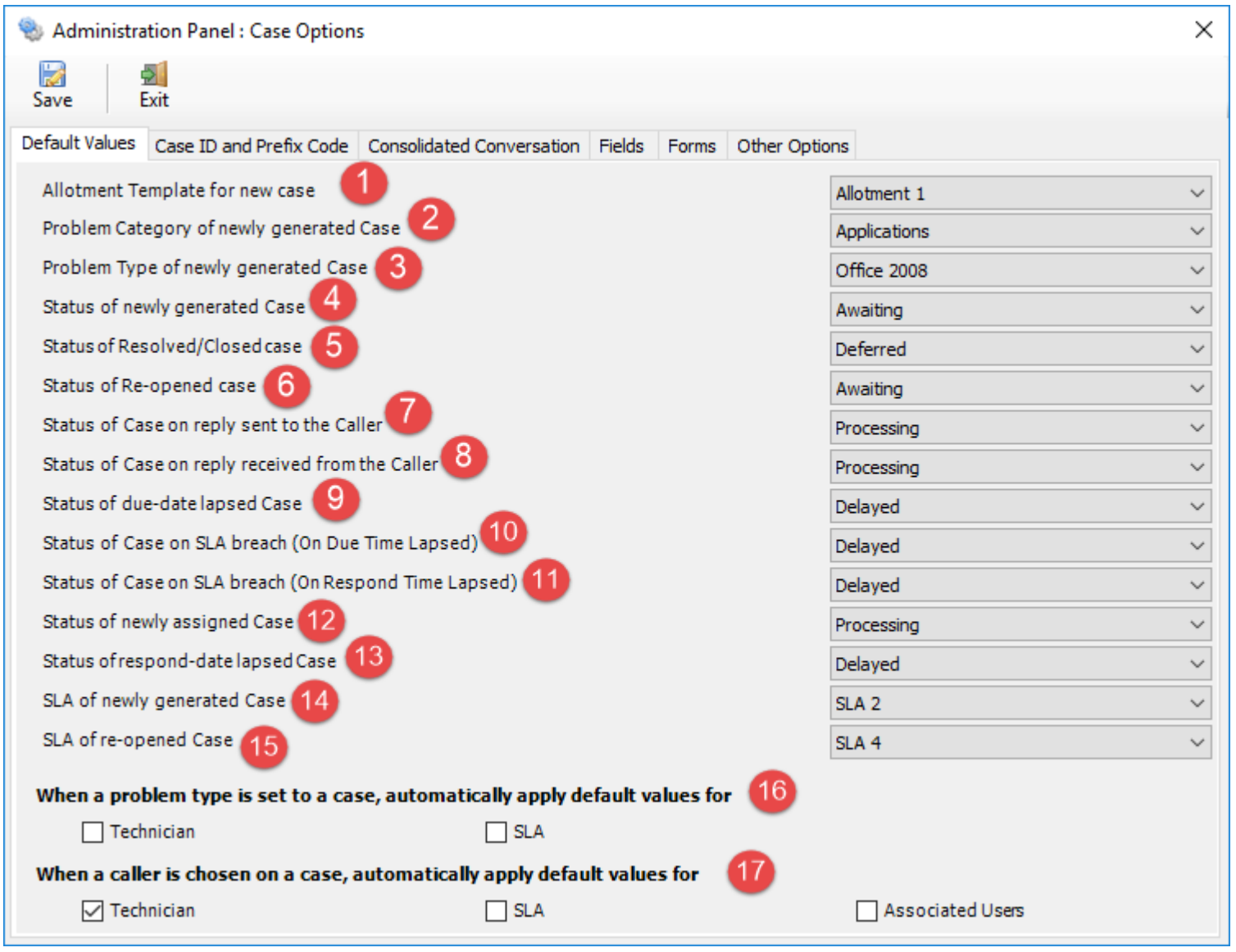
5 If your technicians have added new cases manually in SharePoint through the web browser, such cases are not synced back to the Team Helpdesk Ongoing/Resolved Cases folders in Outlook i.e., copies of such cases are not available in Outlook. If your technicians want to make copies of such cases (e.g., sync back) in Outlook, they would do that via the **'Retrieve Cases from SharePoint'** tool (available in Agent add-in and located under **Outlook > Ongoing Cases** folder > **Ongoing Cases toolbar**).

Alternatively, this feature can be automated via the Team Helpdesk Manager add-in i.e., Outlook with Team Helpdesk manager add-in will automatically check for new cases availability in the SharePoint list and generate copies in Outlook on the fly. To enable it check the option 'Automatically bring newly added cases in SharePoint to Team Helpdesk folders in Outlook'.



Further, you can set the interval the add-in would check for the new cases in SharePoint. Additionally, you can also allow the add-in to send out the case allotment notification to caller, case assignment notification to technicians.

4.16 Case Options



1 **Allotment Template for new case**
If you have defined more than one allotment templates, choose a default allotment template that will be set automatically on newly raised cases. For more on Allotment Templates, refer to *Team Helpdesk Manager > Templates Manager > Allotment Templates*.

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

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

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

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

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

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

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

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

10 **Status of case on SLA breach (on Due time lapse)**
Choose a particular status from the drop-down list that will be set to the case on SLA breach of Due Time.

11 **Status of case on SLA breach (on Response time lapse)**
Choose a particular status from the drop-down list that will be set to the case on SLA breach of Response Time.

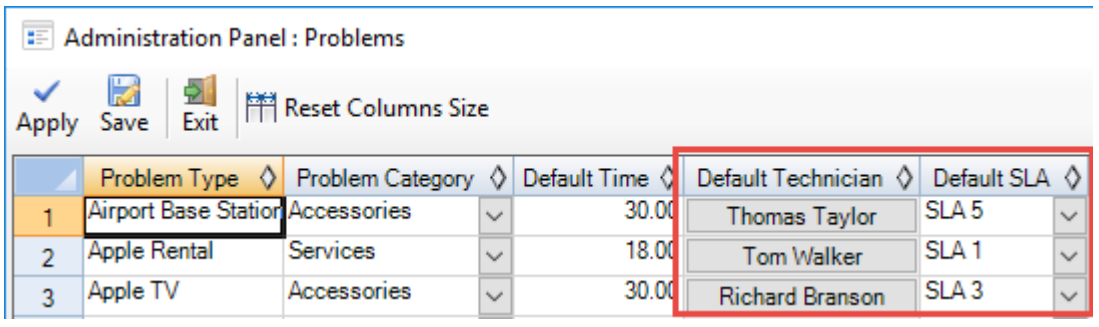
12 **Status of newly assigned case**
Choose a particular status from the drop-down list that will be set to the case just after assigning to a technician.

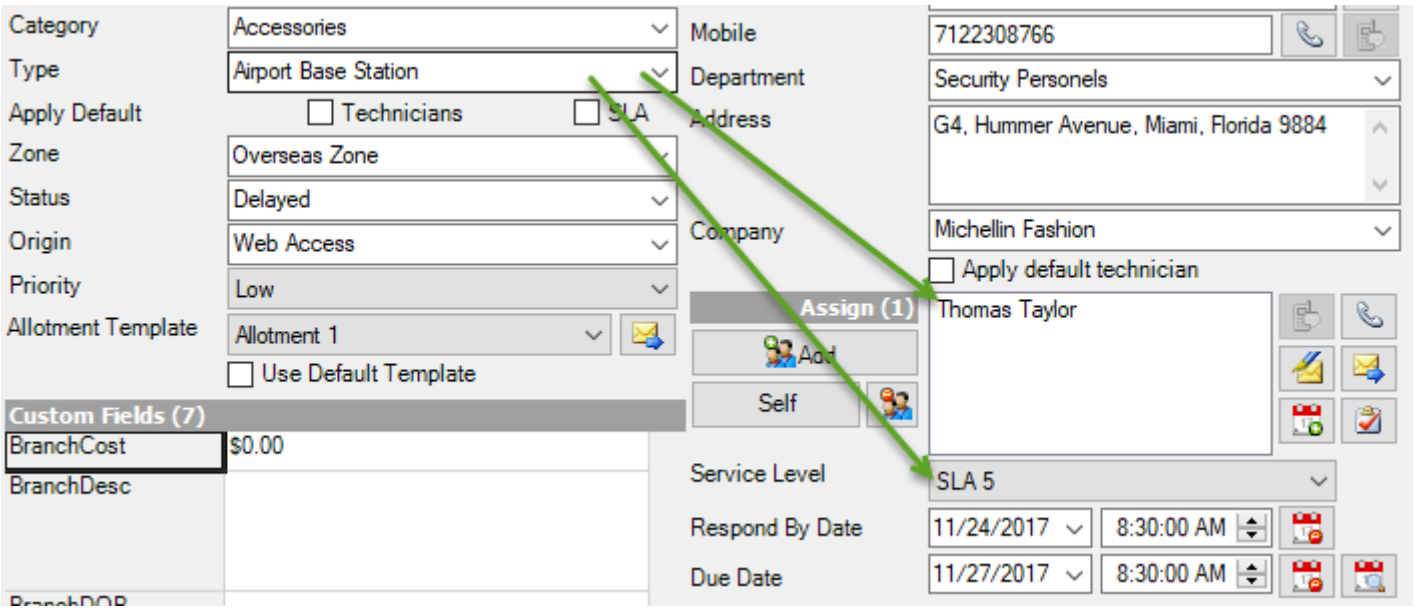
13 **Status of respond by date lapsed case**
Choose a particular status from the drop-down list that will be set to the case on respond date lapse.

14 **SLA for new generated case**
Choose a Service Level Agreement (SLA) value from the drop-down list that will be applied by default on any newly generated case. For more on SLA, refer to *Team Helpdesk Manager > Service Level Agreements.*

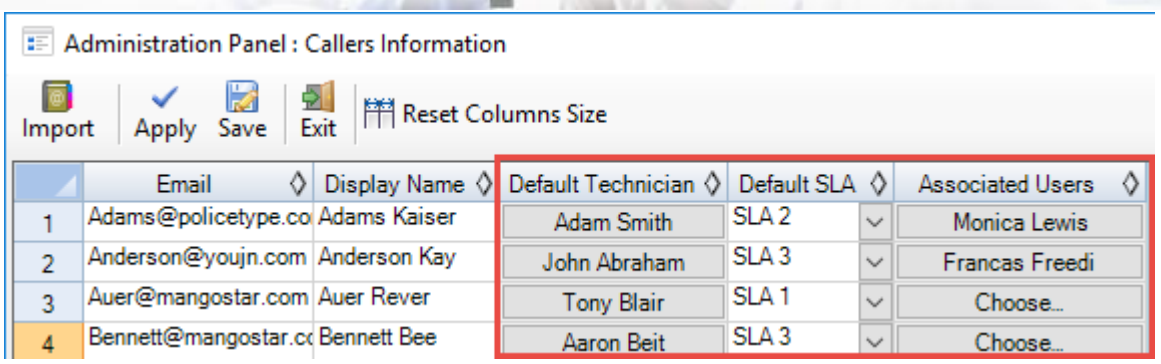
15 **SLA for re-opened case**
Choose a Service Level Agreement (SLA) value from the drop-down list that will be applied to a case on re-opening. For more on SLA, refer to *Team Helpdesk Manager > Service Level Agreements.*

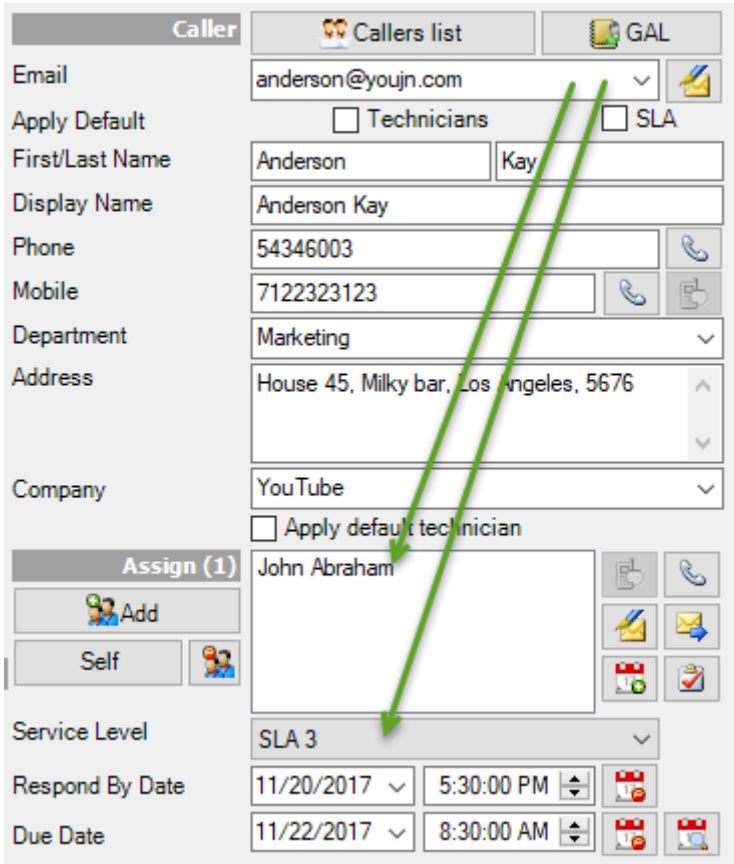
16 When a problem type is chosen from the drop-down field in the case form, you can configure if the helpdesk add-in will also automatically apply the **Technicians** and **Service Level Agreements** (that are default and associated with the chosen Problem Type) to the case. You can choose default technicians and SLA for each problem type under *Team Helpdesk Manager > Problems List.*

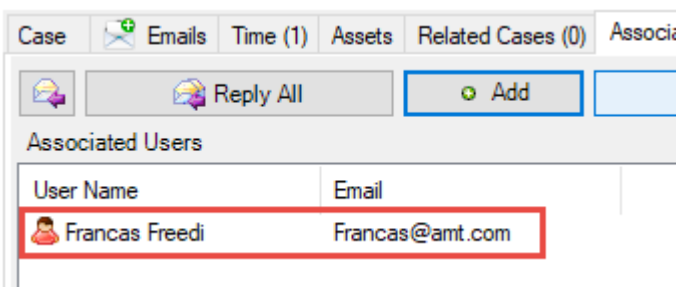




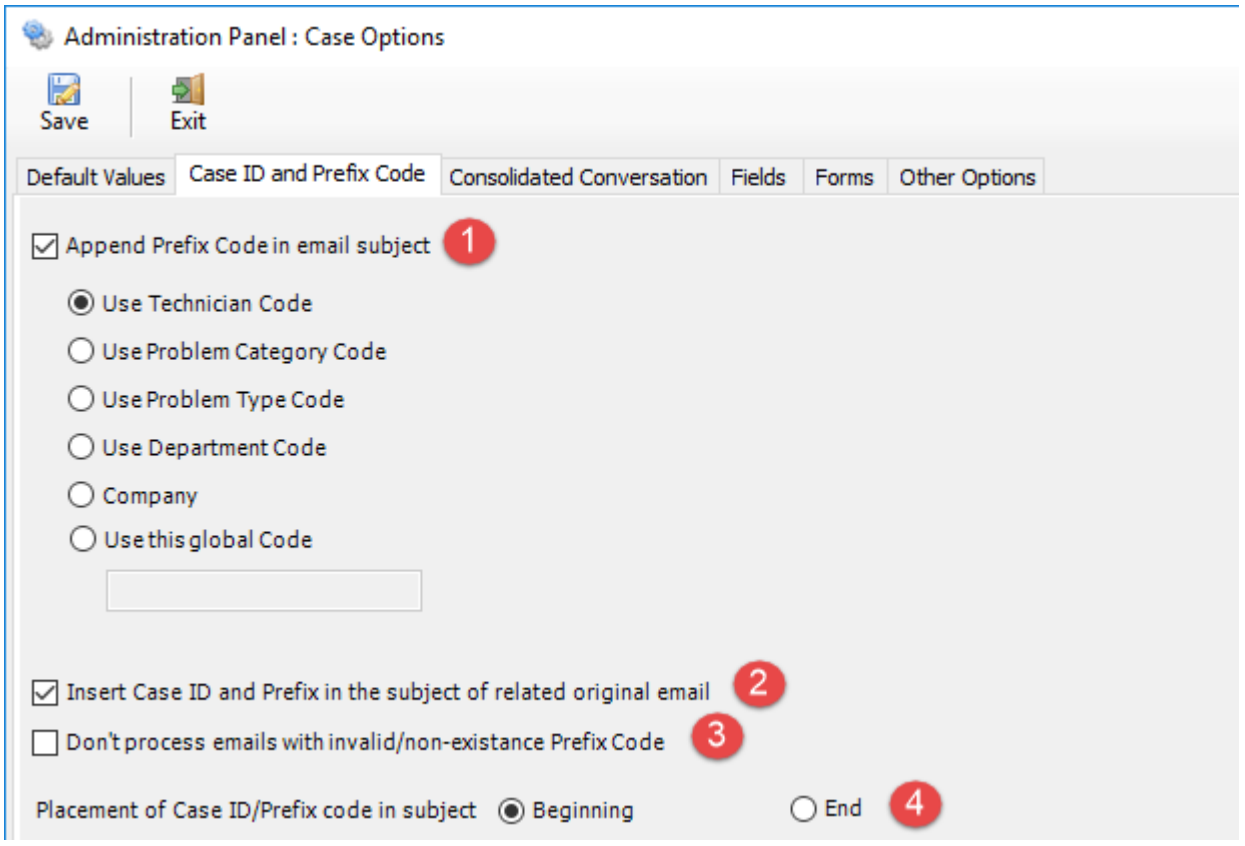
17 When a caller is chosen from the drop-down field in the case form, you can configure if the helpdesk add-in will also automatically apply the **Technicians, Service Level Agreements** and **Associated Users** (that are default and associated with the chosen caller) to the case. You can choose default technicians, SLA and Associated Users for each caller under *Team Helpdesk Manager > Callers List.*


Administration Panel : Callers Information
Import
Apply
Save
Exit
Reset Columns Size
Email
Display Name
Default Technician
Default SLA
Associated Users
1 Adams@policetype.co Adams Kaiser Adam Smith SLA 2 Monica Lewis
2 Anderson@youjn.com Anderson Kay John Abraham SLA 3 Francas Freedi
3 Auer@mangostar.com Auer Rever Tony Blair SLA 1 Choose...
4 Bennett@mangostar.c Bennett Bee Aaron Beit SLA 3 Choose...


Caller
Callers list
GAL
Email
anderson@youjn.com
Apply Default
Technicians
SLA
First/Last Name
Anderson
Kay
Display Name
Anderson Kay
Phone
54346003
Mobile
7122323123
Department
Marketing
Address
House 45, Milky bar, Los Angeles, 5676
Company
YouTube
Apply default technician
Assign (1)
John Abraham
Add
Self
Service Level
SLA 3
Respond By Date
11/20/2017
5:30:00 PM
Due Date
11/22/2017
8:30:00 AM


Case
Emails
Time (1)
Assets
Related Cases (0)
Reply All
Add
Associated Users
User Name
Email
Francas Freedi
Francas@amt.com

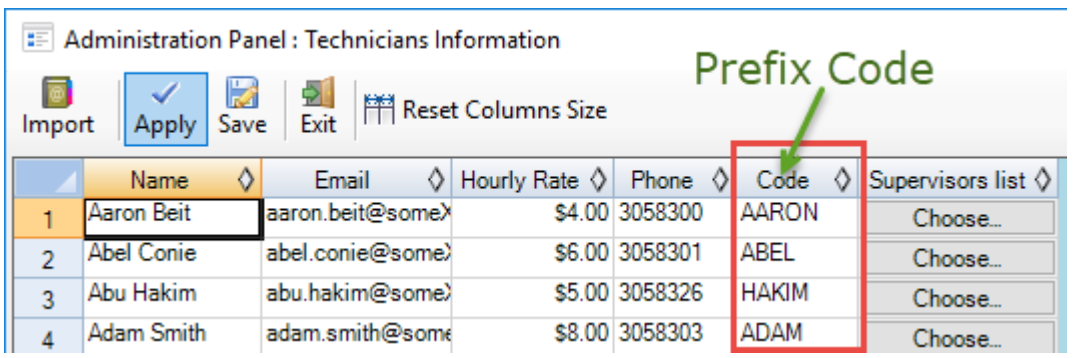
Case ID and Prefix Code



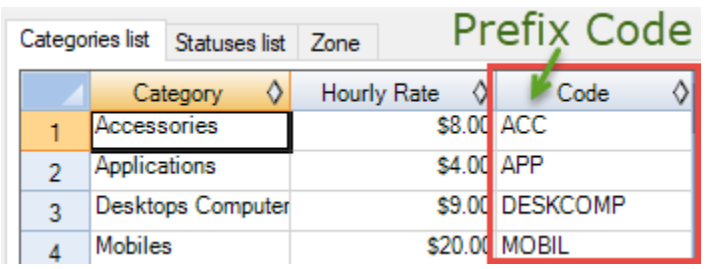
1 **Append Prefix Code in Email Subject**

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

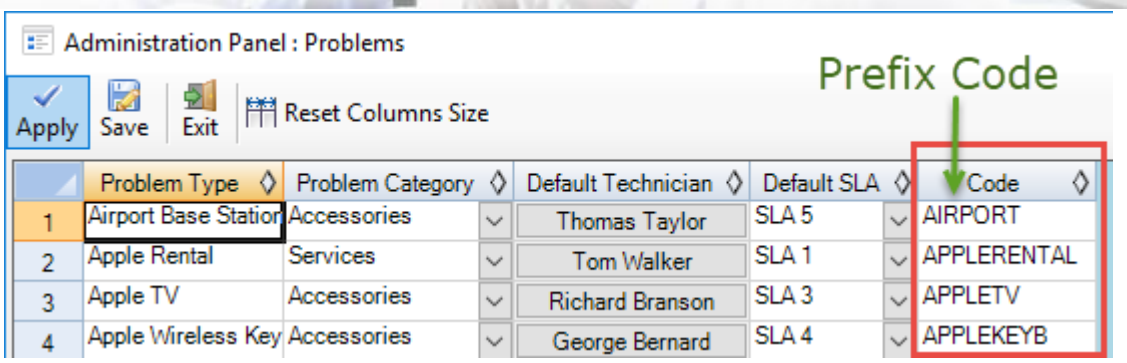
- **Technician Code** – You can define prefix code for each technician under *Team Helpdesk Manager > Technicians List.*



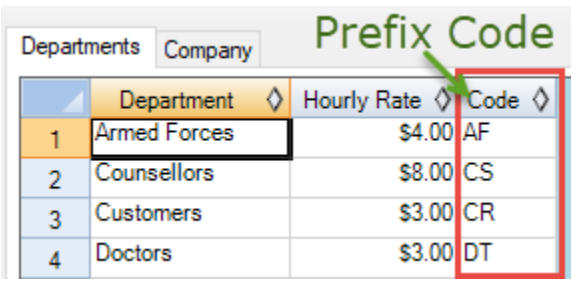
- **Problem Category Code** – You can define prefix code for each category under *Team Helpdesk Manager > Problems List > Categories List* tab.



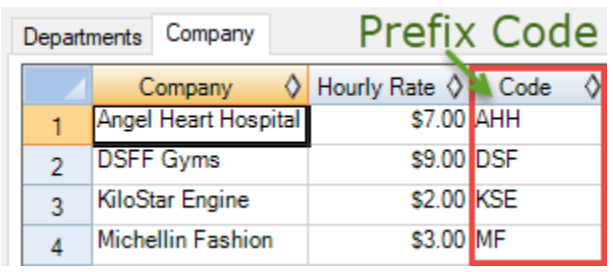
- **Problem Type Code** – You can define prefix code for each problem type under *Team Helpdesk Manager > Problems List.*



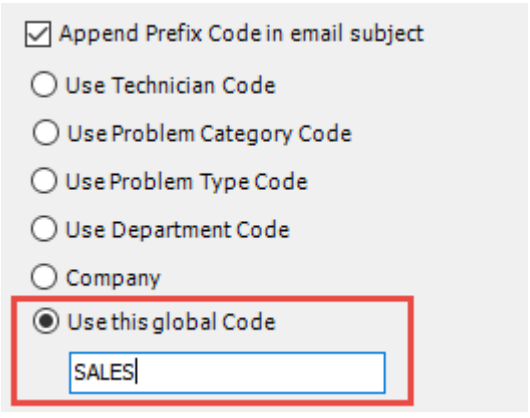
- **Department Code** – You can define prefix code for each department under *Team Helpdesk Manager > Callers List > Departments* tab.



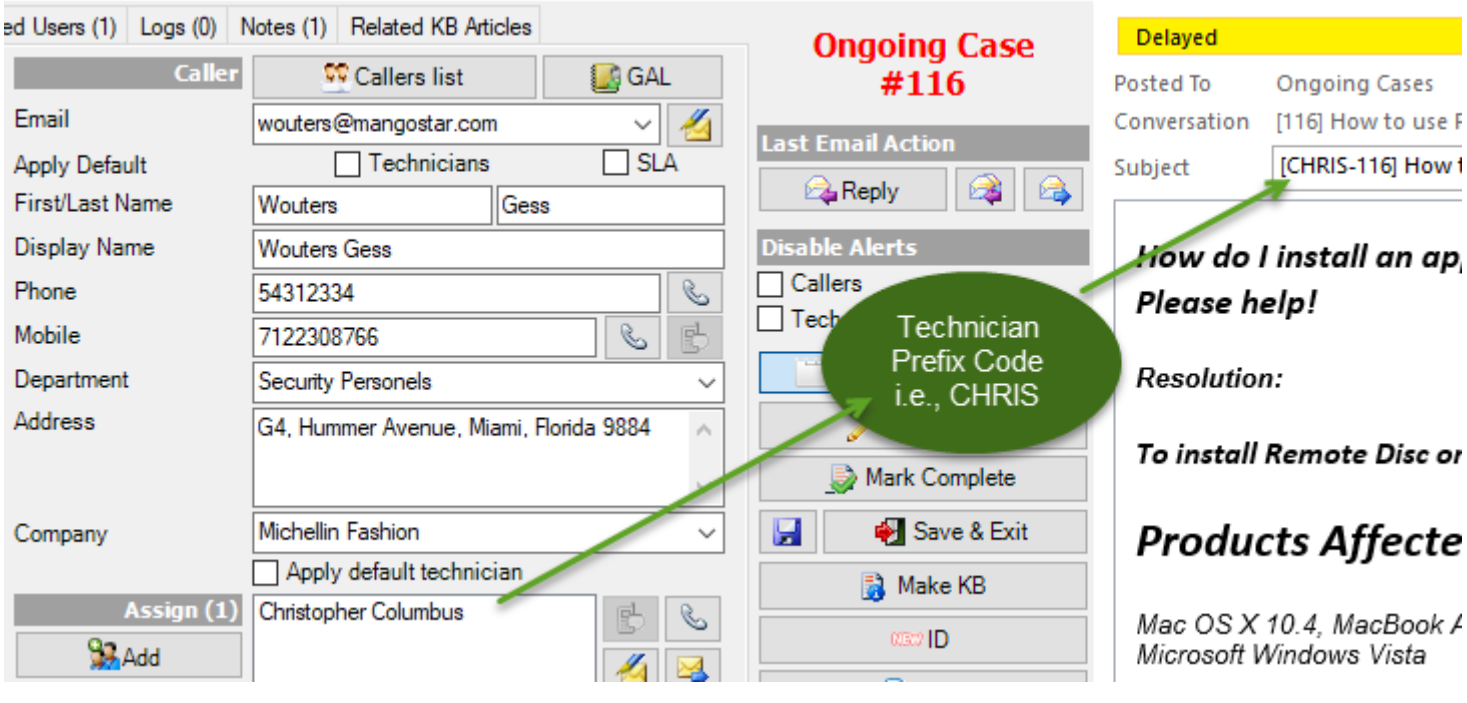
- **Company Code** – You can define prefix code for each company under *Team Helpdesk Manager > Callers List > Company* tab.



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



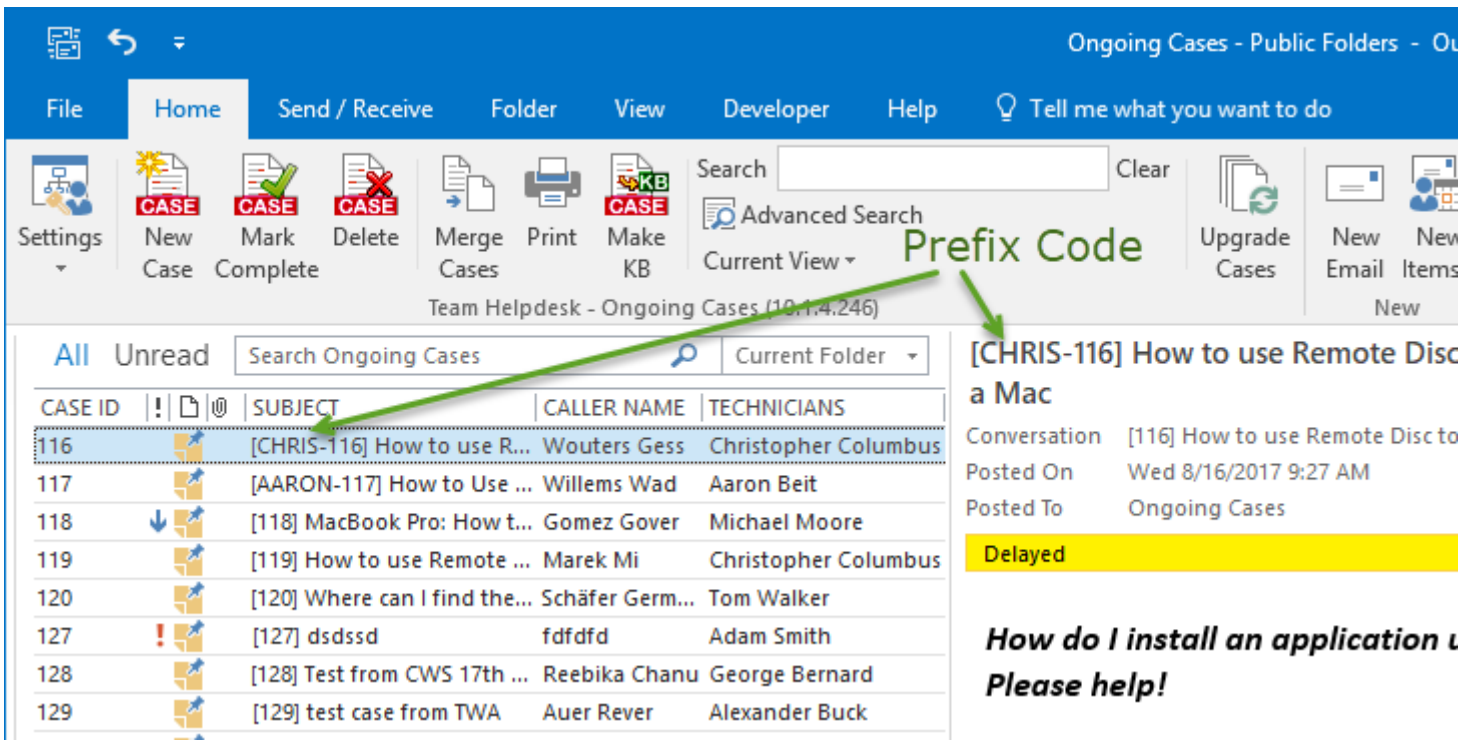
For instance, you can choose **'Use Technician Code'** so that the helpdesk add-in can insert the prefix code of the assigned technician in the subject of the case and emails.



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

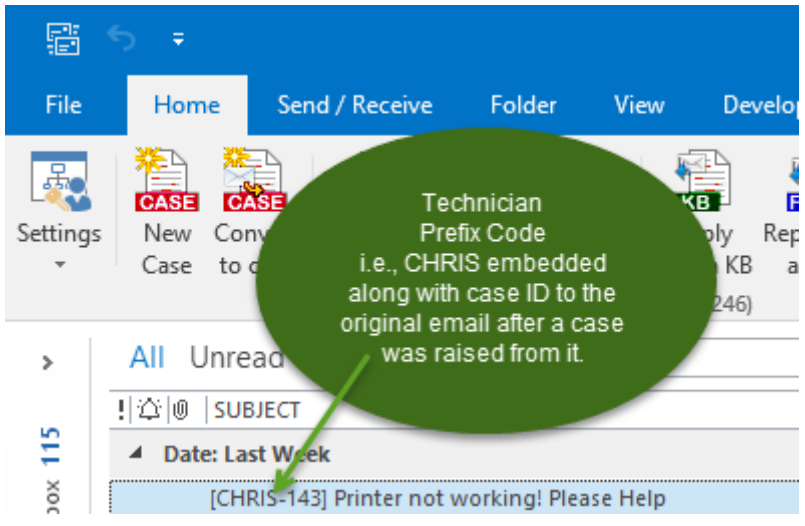
What are the benefits? By adding a prefix code to the subject of the case or on outgoing emails, when callers reply back, the received emails would contain the same prefix code. And this in turn may aid in quick recognition of the particular case, by simply looking at the prefix code.

For instance, if the department code is set as the prefix code, you and other technicians can easily recognize that a particular reply belongs to a specific department. Likewise, if the technician code is set as the prefix code, you can easily recognize who is responsible for attending to the reply or the case. Moreover, it is easy to differentiate important emails from the less trivial ones.



2 **Insert Case ID and Prefix in the subject of the related original email**

Enable this option so that the helpdesk add-in would embed prefix code and Case ID into the subject of the original email just after a case is successfully raised from that email.



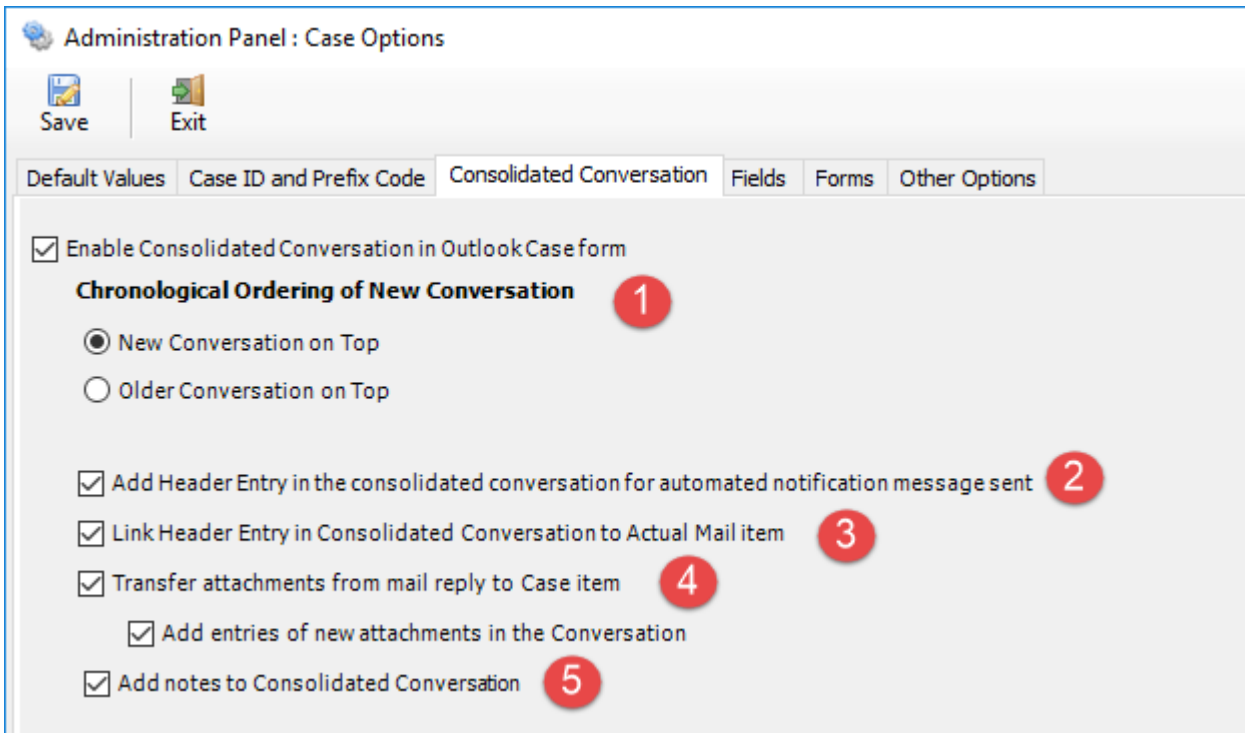
3 **Don't process emails with invalid/non-existent prefix code**

When the add-in tries to add/update a possible reply (that contains a number enclosed in square brackets) to its corresponding case, enabling this option will skip processing those emails that do not contain a valid prefix code in the subject.

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

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

Consolidated Conversation and Emails Threading

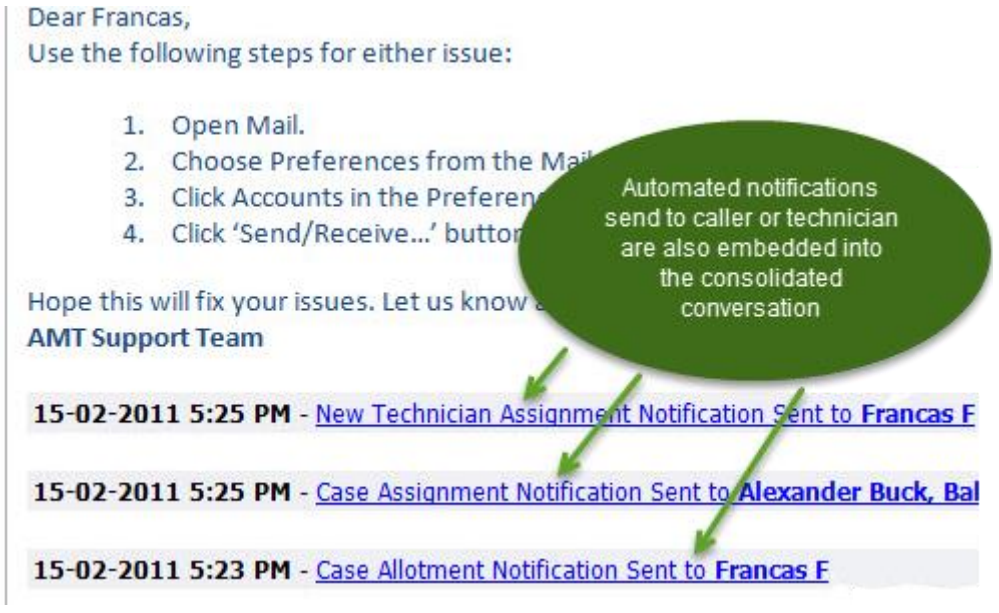


Most support cases cannot be closed within a single e-mail and response. Feedback from the caller and suggestions from the respective technicians often occur over multiple request-response emails. Moreover, different members from the support teams may provide resolutions during the course of the request.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

With the conversation threading feature, Team Helpdesk captures the complete course of the conversation chronologically, from all email communications received or sent (including those automated notifications sent to caller and technicians in due course). The end result is a consolidated view where all the responses to a support request are collated together. Redundant and repeated conversations are filtered out to present only the relevant communications. This eases the task of the helpdesk and minimizes repeating what has already been done, while keeping support team members to stay on the track. Another advantage is it allows the technician to quickly glimpse through the thread and get a complete overview on the responses in chronological order and resolution applied to the particular support request, something which is hard to extract from viewing multiple email responses.

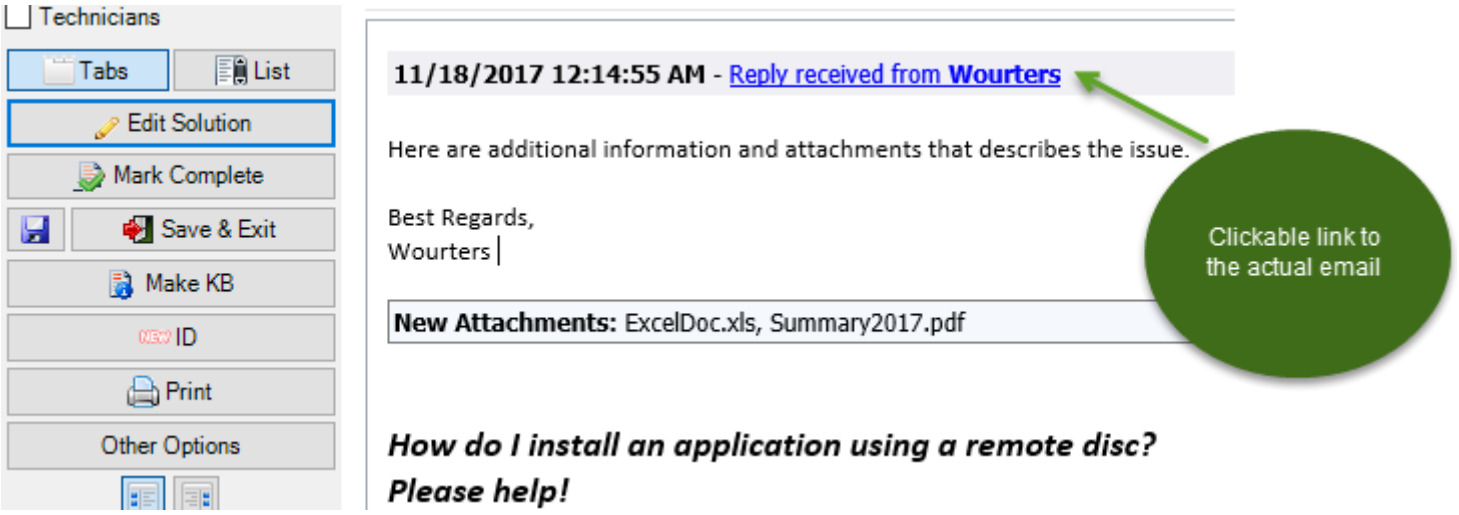
1. Choose if new conversation to the case is to be added on top or below of existing consolidated conversations.

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



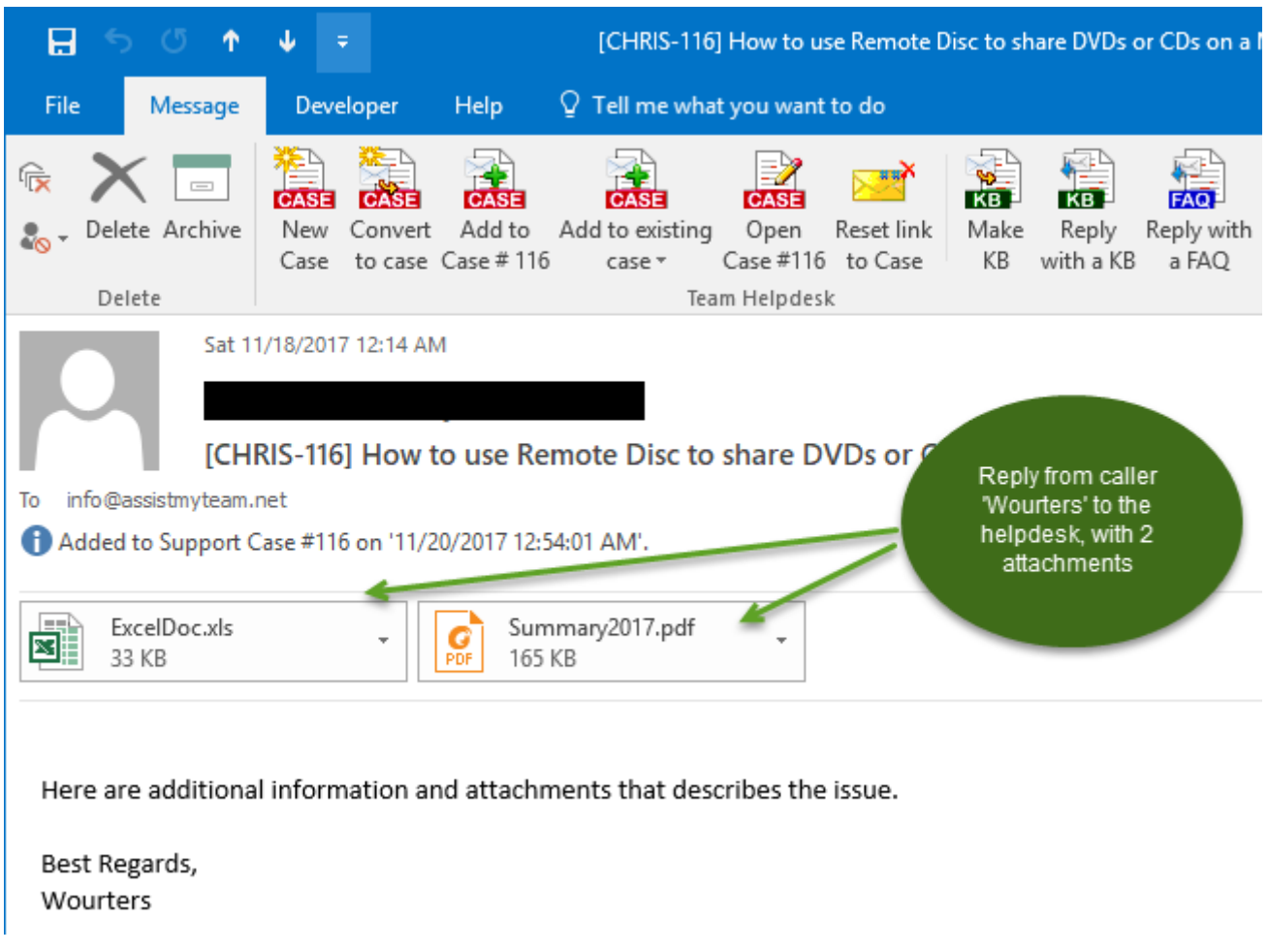
3 **Link Header entry in consolidated conversation to actual mail item**

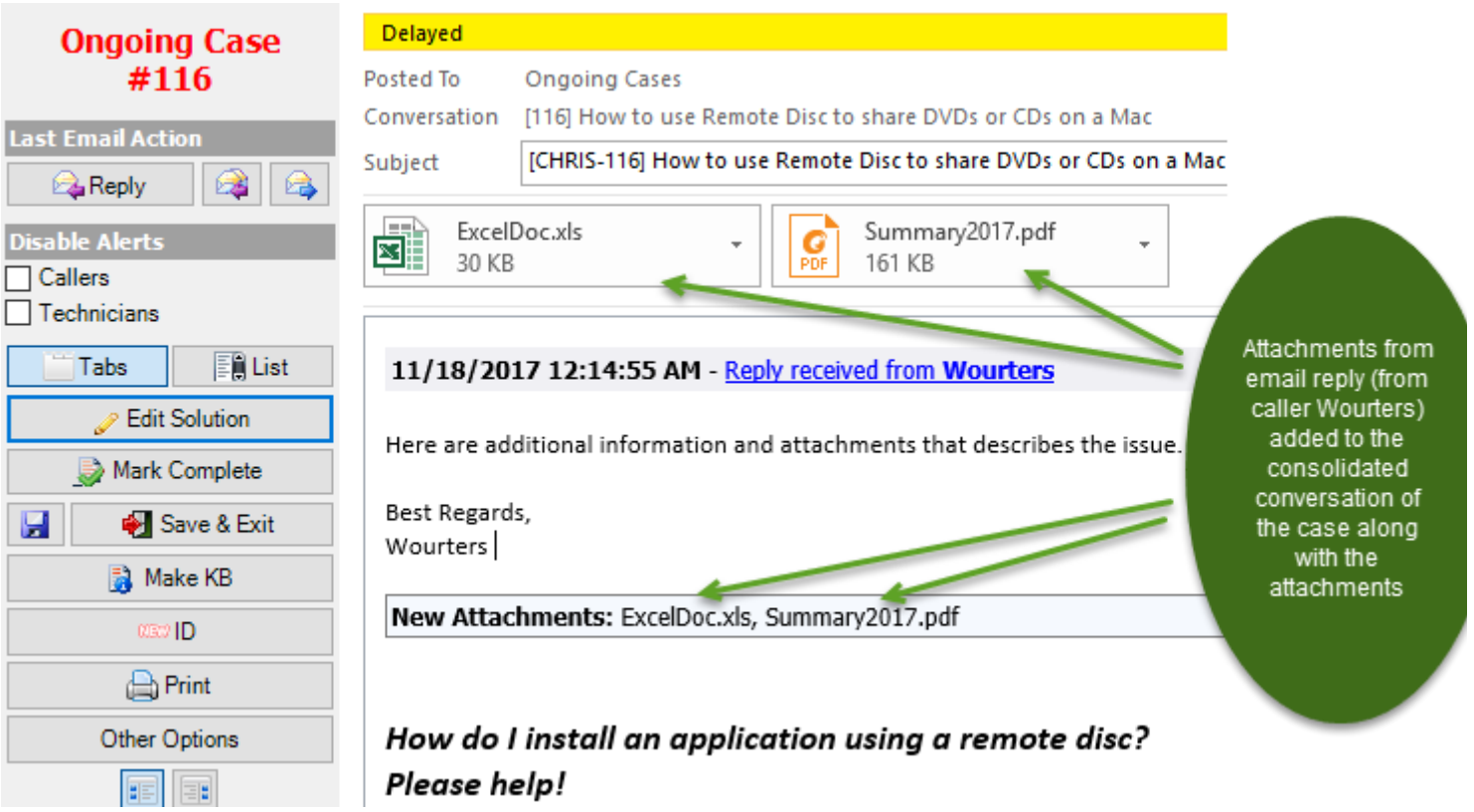
Enable this option so that the added conversation snippet is hyperlinked to the actual email item (so that it is clickable and allows for quick access to the linked email without searching for it).



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

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

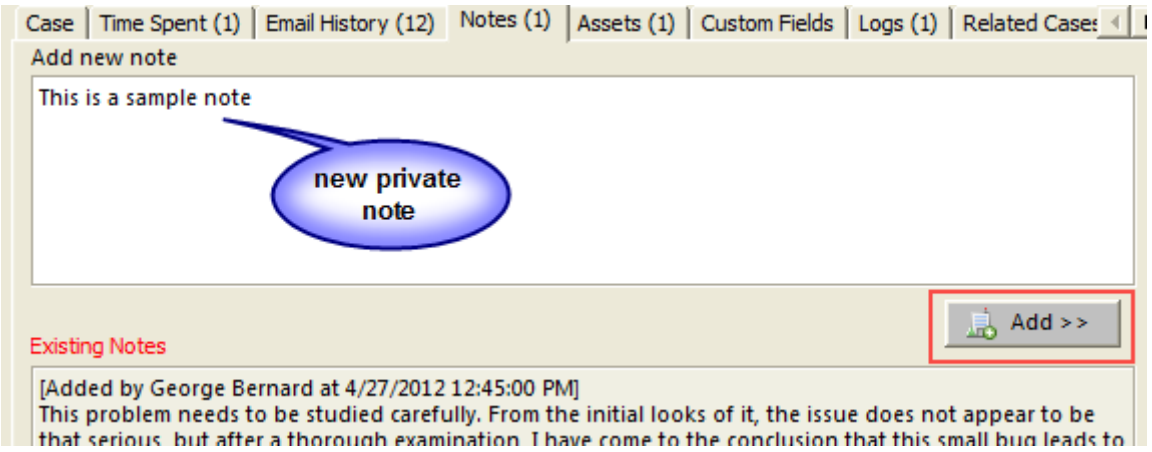


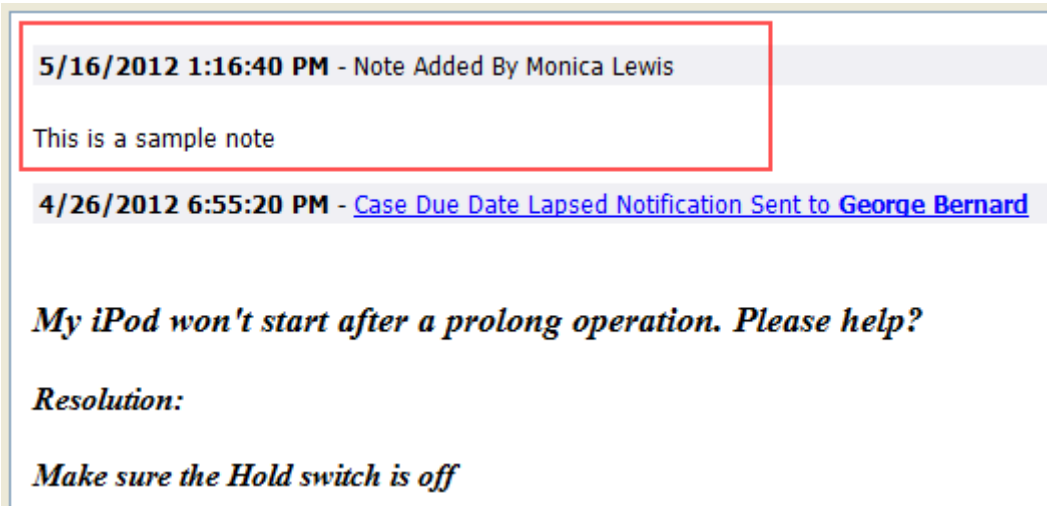


Optionally, you can enable the option '**Add entries of new attachments in the conversation**', so that a new snippet entry on the attachment names (which were added to the case) are included to the conversation.

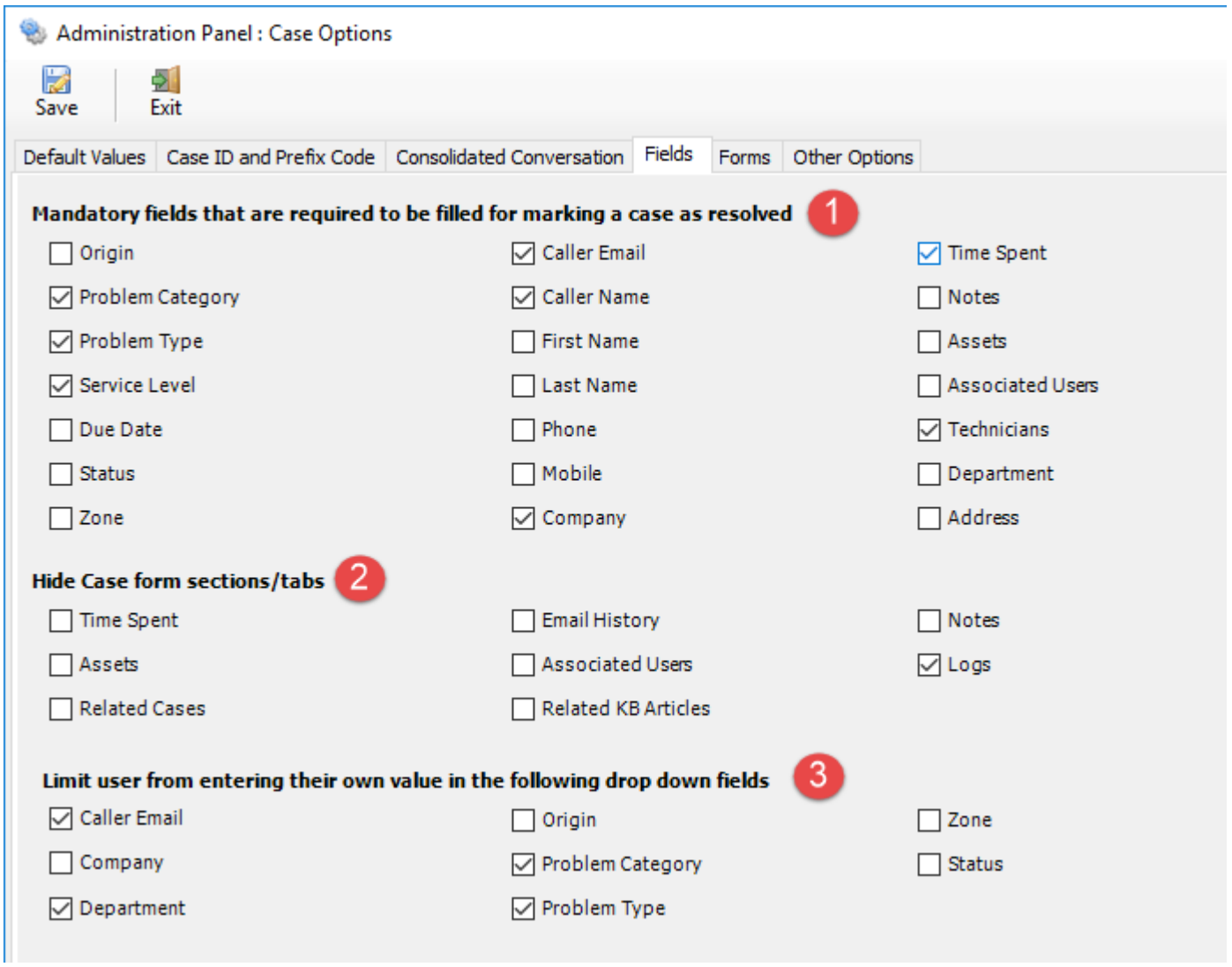
5 **Add notes to consolidated conversation**

Enabling this would add a copy of the private note (that is added from the Notes tab of the case form) to the conversation threading (body field), which is then visible even when the case is previewed in Outlook Explorer window when selected.



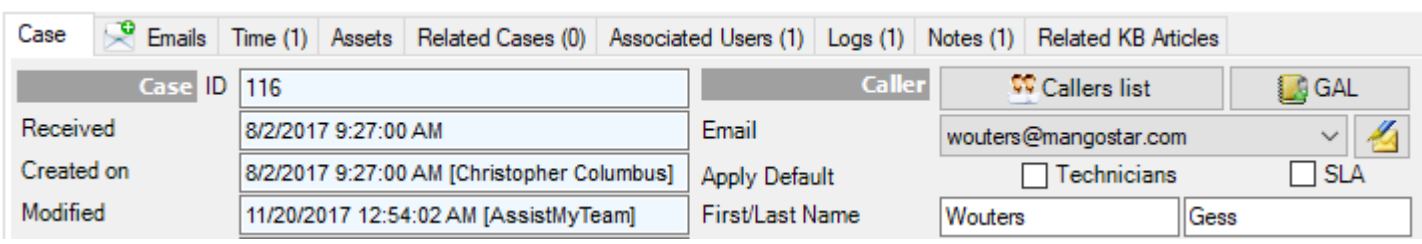


Helpdesk Fields Workflow

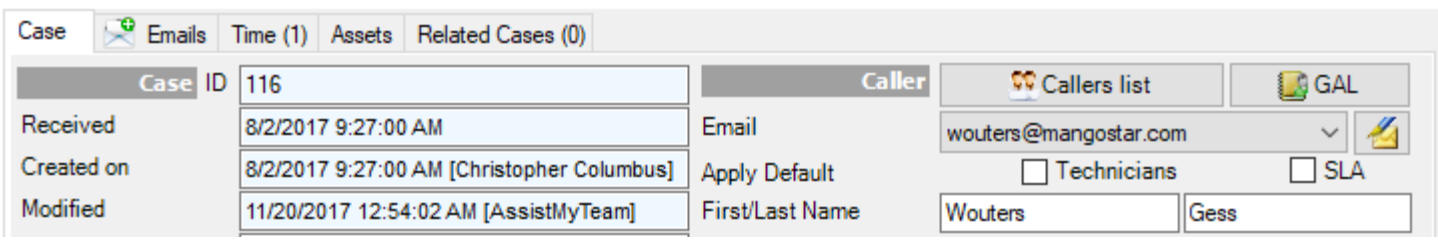


1 **Mandatory fields that are required to be filled out for marking a case as resolved**
Enable this option to set certain helpdesk fields as mandatory to be filled, before the case can be marked resolved or complete. And select the fields that are to be made mandatory.
NOTE: Mandatory fields will be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

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

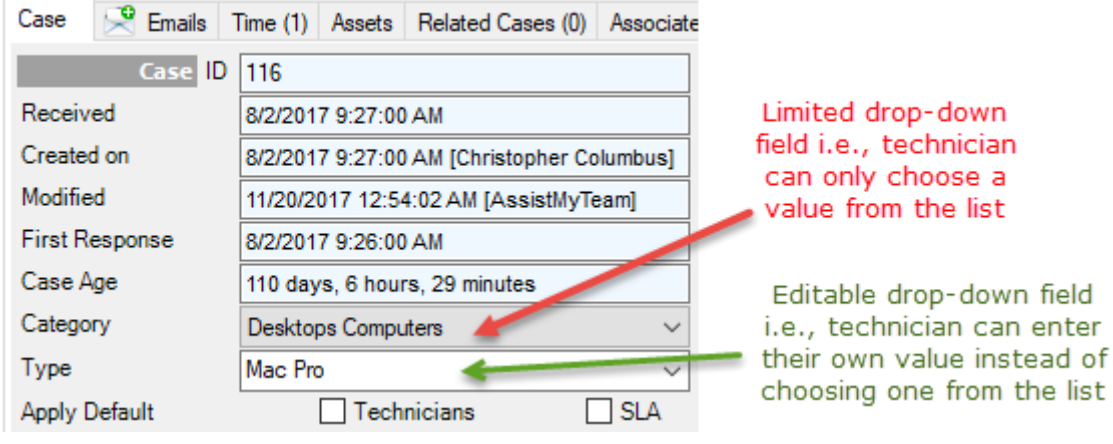


And below is the case form with 'Related Cases', 'Associated users', 'Logs', 'Notes' and 'Related KB Articles' tabs hidden.



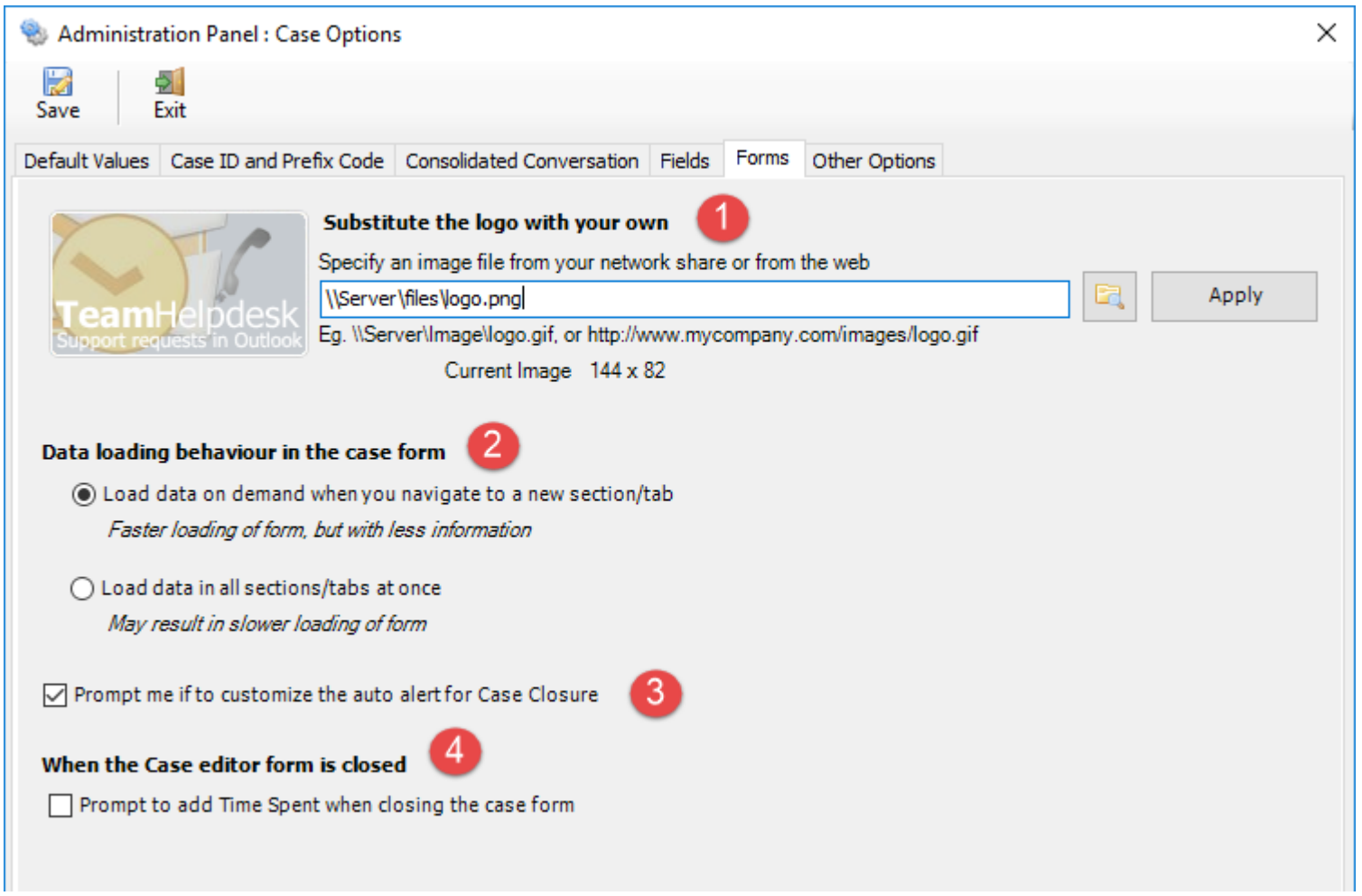
3 **Limit user from entering their own value in the following drop-down fields**

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



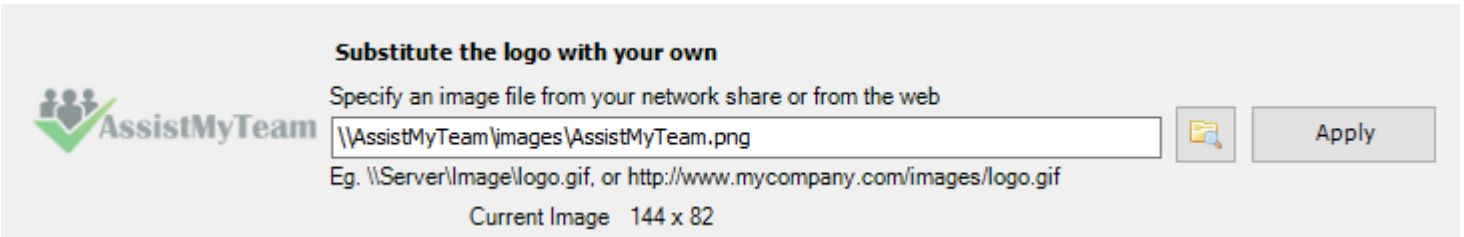
NOTE: drop-down fields with limitation in case form are greyed out, where ones without limitation are not (white back-color)

Logo and Case Form

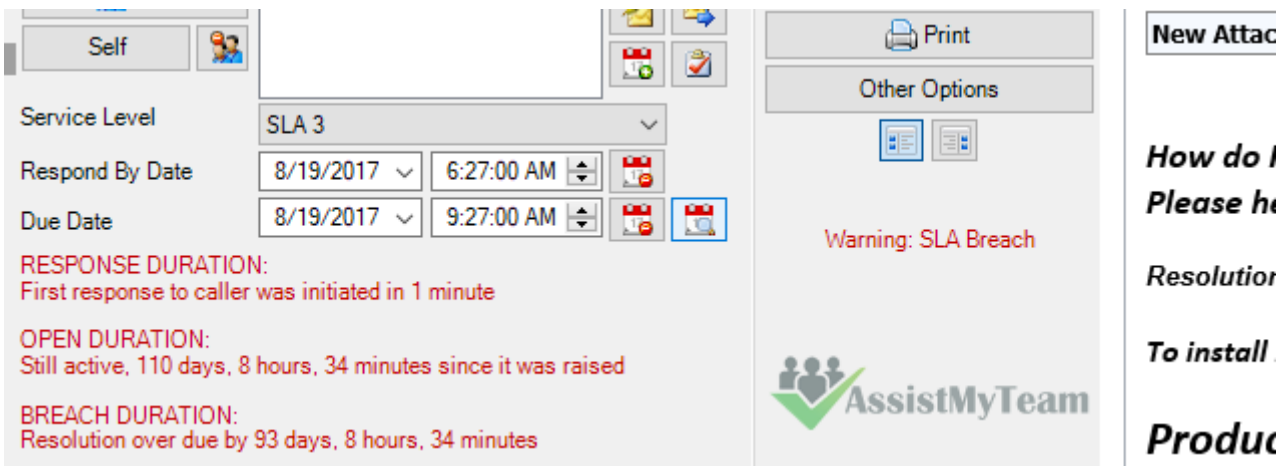


1 **Substitute the logo with your own**

To use your own company logo or brand in the case form, you can specify an image file (JPG, GIF, PNG) located on a network shared folder. Or, alternatively, you can use an image file located on the web.



And when you open and view the case form in Outlook, your company logo you specified above should show.



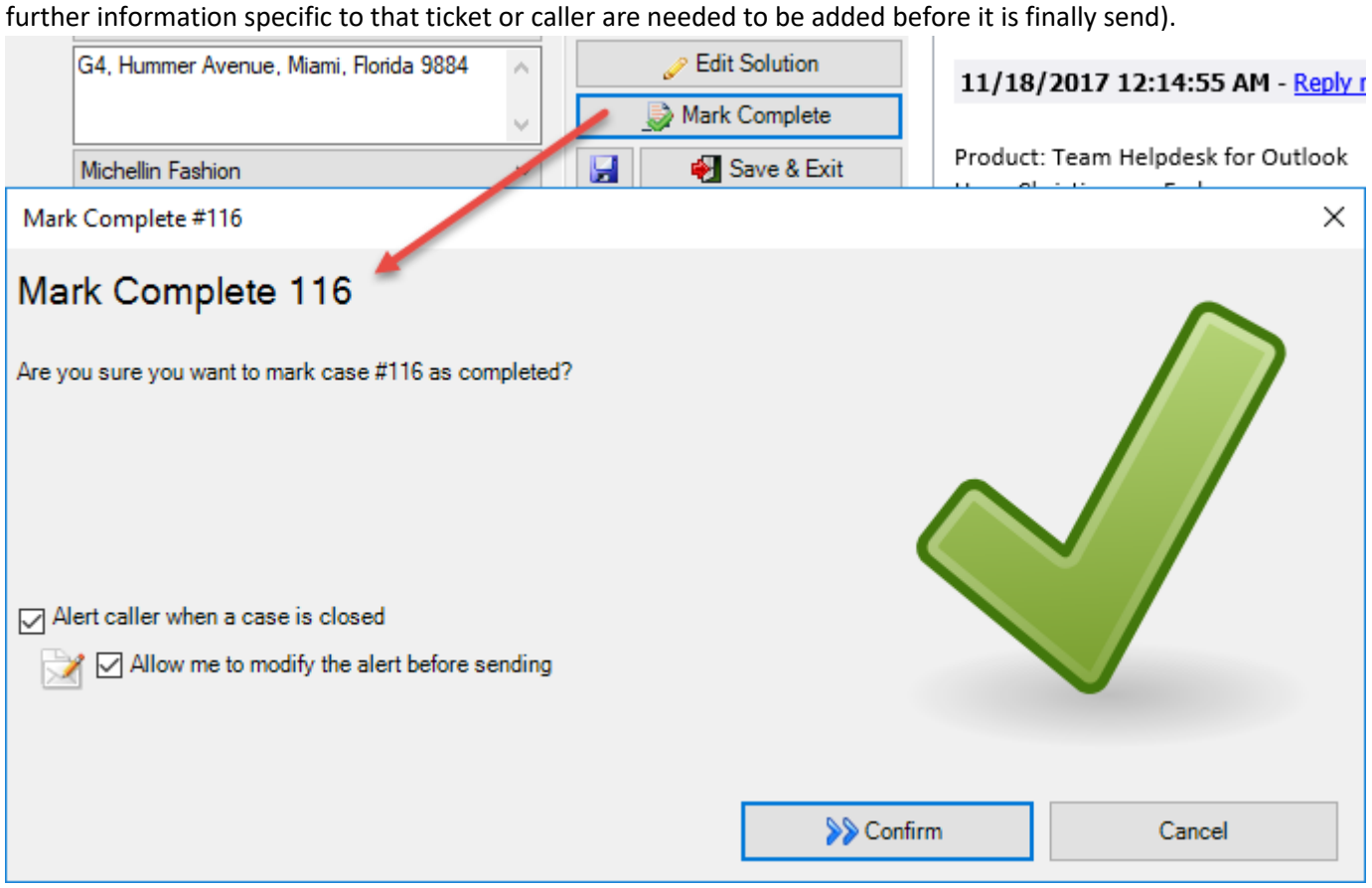
NOTE: Make sure you use an image path that is accessible to all technicians from their systems. This means, you can either make sure of an image file that is located on a shared network folder (e.g., \\Server\files\logo.gif) or an image from the web (e.g., www.company.com/logo.gif)

2 **Data loading behavior in the case form**

By default, helpdesk add-in implements 'on-demand' loading of the data in the case form for performance i.e., it will load the data for the case section/tab as and when you click and navigate to it. However, with the second option, you can overwrite this workflow to force the helpdesk add-in to load all data concurrently at once in all sections and tabs of the case form. Note that, with this approach, the performance might take a hit and the case form might take longer time to load and show.

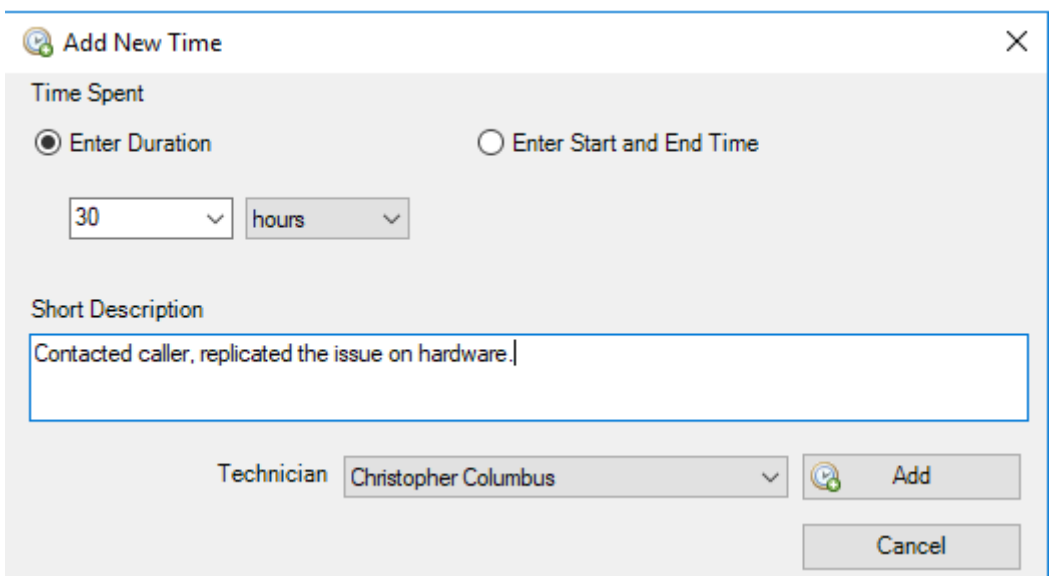
3 **Prompt me if to customize the auto alert for Case Closure**

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

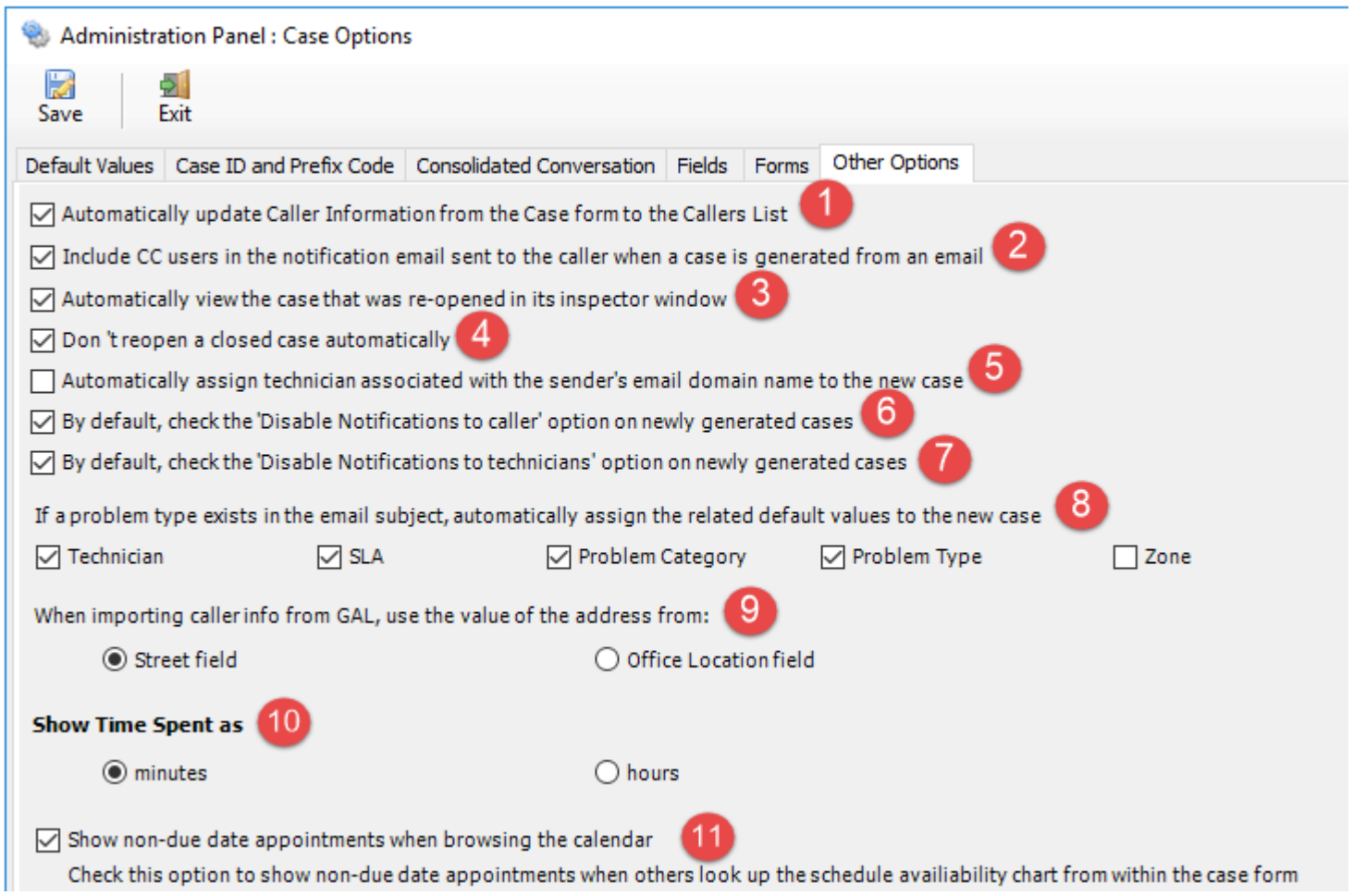


4 **Prompt to add Time Spent when closing the case form**

Enable this option to force the helpdesk add-in to prompt the technician to add their time spent data to the case when the form window is closed.



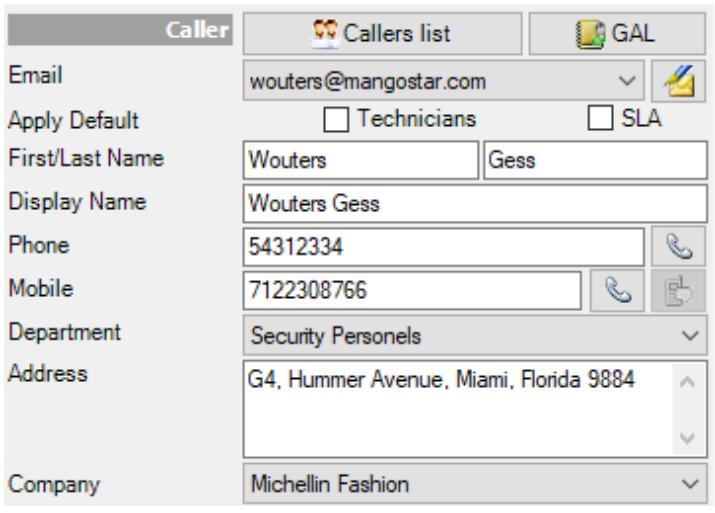
Other Case Options



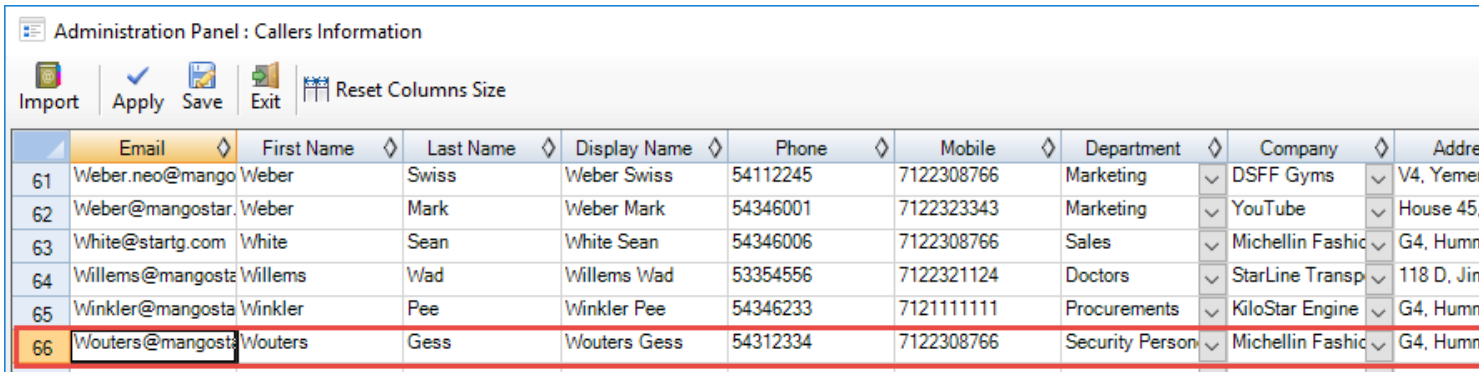
1 **Automatically update caller information from the case form to the Callers List**

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

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



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



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

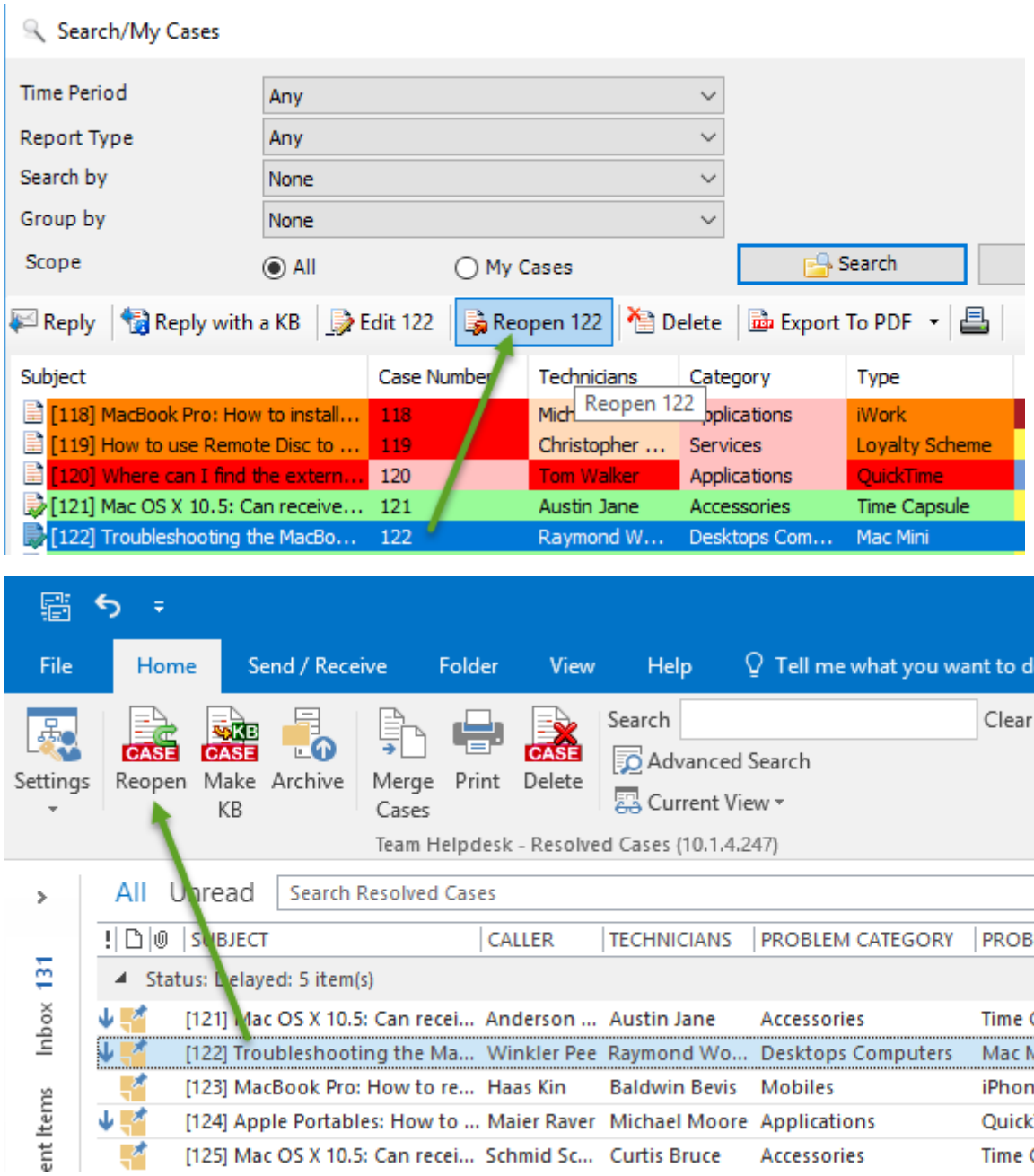
2 **Include CC users in the notification email sent to the caller when a case is generated from an email**

If enabled, when a support case is first generated from an email, helpdesk add-in will send out the case allotment

notification email to the caller, as well as to the recipients specified in the CC field of the original email. The benefit is to allow anyone (on the CC line) to respond to the ticket thread without creating a new ticket.

3 **Automatically view the case that was re-opened in its inspector window**

Enable this option to force helpdesk add-in to display the case in its window when it is re-opened from completed state. This is applicable and handy if you had re-opened the cases from the search panel or from the Outlook explorer window.



4 **Don't reopen a closed case automatically**

There may be situations where the caller just replied to say, thank you for the support. But that may trigger a reopening of the case with unnecessary overhead. Enable this option to prevent the helpdesk add-in from automatically re-opening a case from its completed state when a response from the caller is received by the helpdesk after the completion of the case. This will also prevent the add-in from adding redundant and irrelevant information to the closed case.

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

5 **Automatically assign technician associated with the sender's email domain name to the new case**

If enabled, helpdesk add-in will automatically assign default technician to a case based on the sender's domain address e.g. sender@somecompany.com

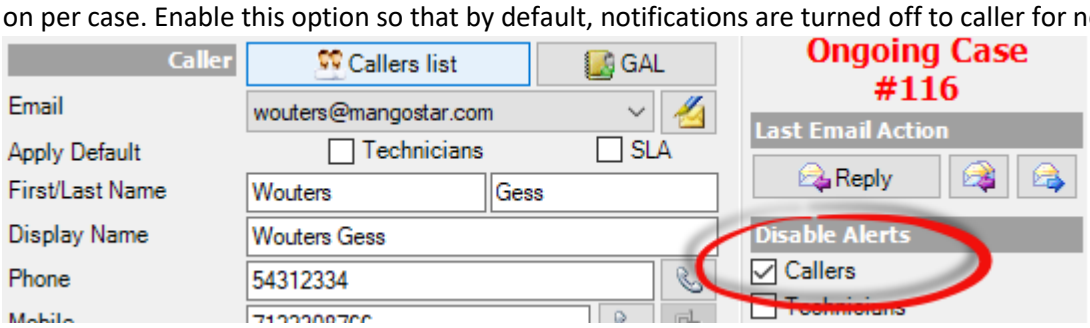
Departments | Company

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

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

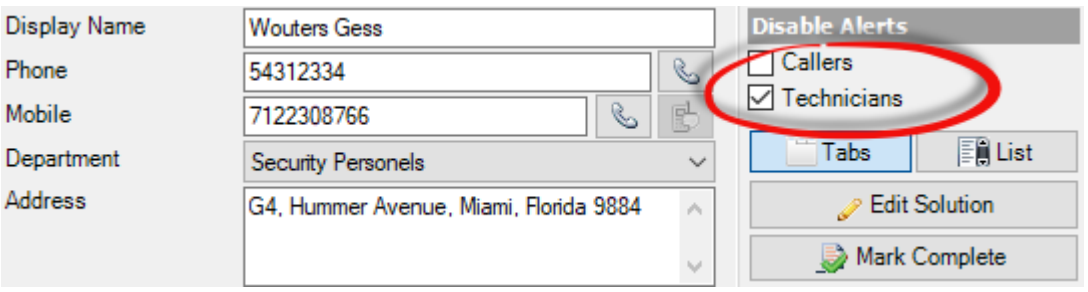
6 **By default, check the 'Disable Notifications to caller' option on newly generated cases**

Sometimes, on specific cases or caller, you may want helpdesk add-in not to send auto notifications on activities or events of the case. So instead of disabling a particular auto-alert at the global level, you can choose to disable auto-alerts on per case. Enable this option so that by default, notifications are turned off to caller for new cases.



7 **By default, check the 'Disable Notifications to technicians' option on newly generated cases**

Likewise, on specific cases or technicians, you may want helpdesk add-in not to send auto notifications on activities or events of the case. So instead of disabling a particular auto-alert at the global level, you can choose to disable auto-alerts on per case. Enable this option so that by default, notifications are turned off to assigned technicians for new cases.



8 **If a problem type exists in the email subject, automatically assign it and related default values to the new case**

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

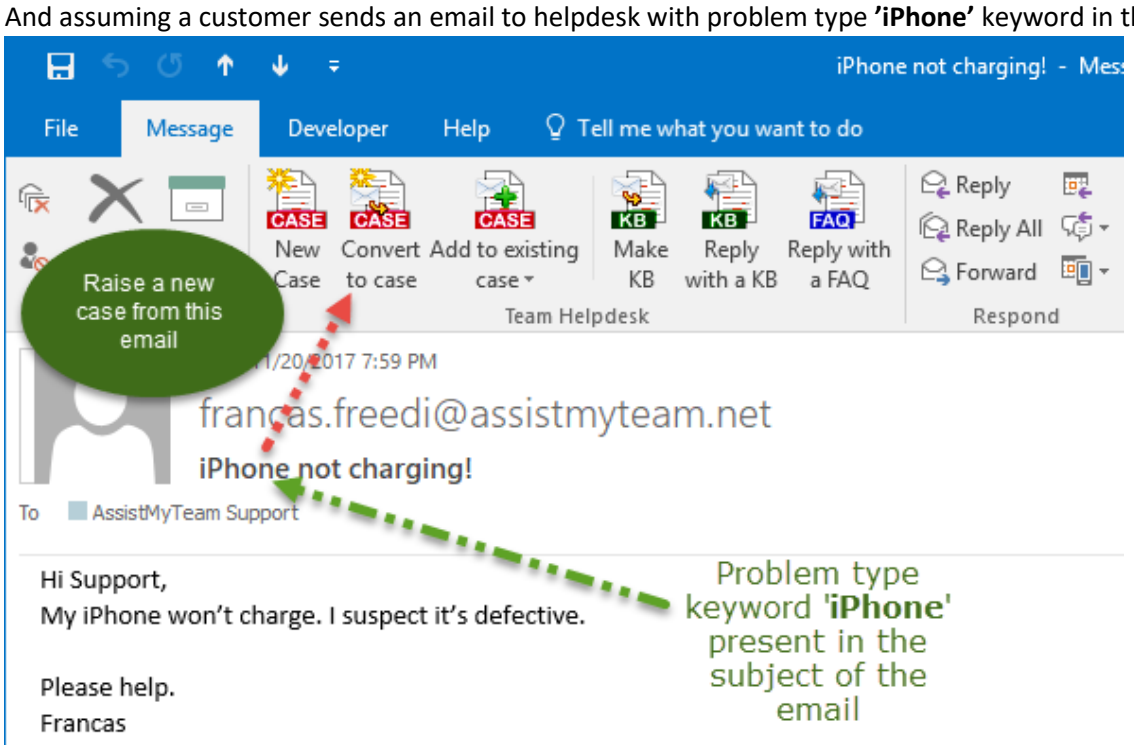
For example, here is a problem type '**iPhone**' in the Problems List, which belongs to 'Mobiles' category and default technician is 'Aaron Beit', and default Service level is 'SLA 3' and default Zone (custom problem field) is 'East Zone'.

Administration Panel : Problems

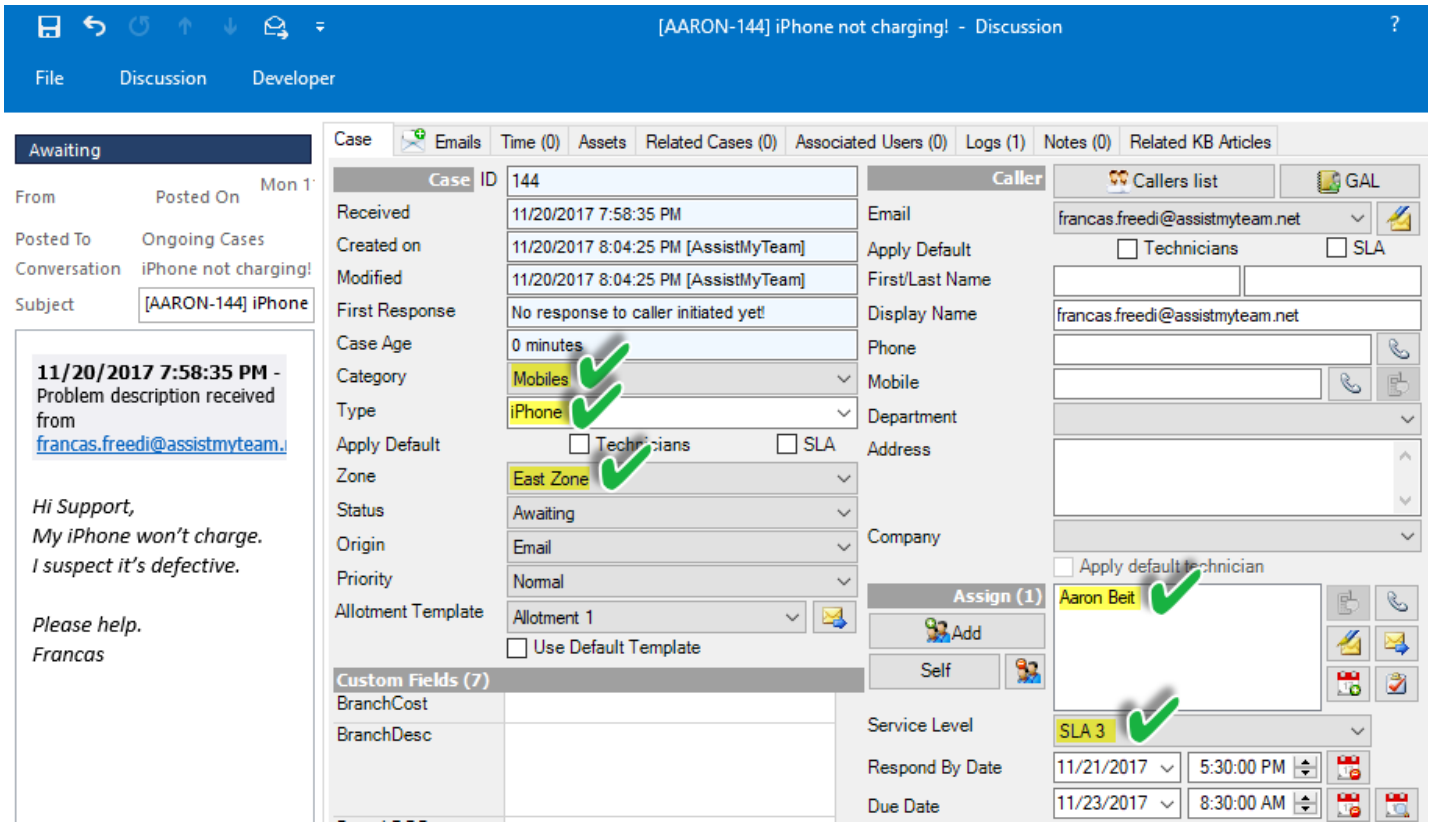
Apply | Save | Exit | Reset Columns Size

	Problem Type	Problem Category	Default Technician	Default SLA	Zone
9	iPhone 3G	Mobiles	Adam Smith	SLA 1	West Zone
10	iPhone	Mobiles	Aaron Beit	SLA 3	East Zone
11	iPod Classic	Music Players	Abu Hakim	SLA 5	West Zone

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



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



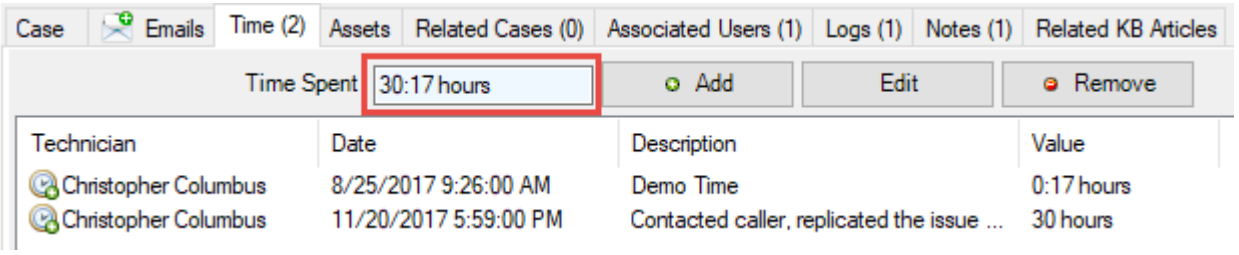
9 **When importing caller info from GAL, use the value of the address from** – **Street** field or **Office location** field

With this feature, when choosing a caller from the address book, you can instruct the add-in which location field of the contact in Global Address List (GAL) would be used to populate the Address field of the Caller in the Outlook Case form. You can choose the Street field of the contact, or the Office location. Default is the **Street** field.

10 **Show Time Spent in – Minutes or Hours**

You can set helpdesk add-in to display the time spent on a case as minutes or hours. Default is in 'Minutes'.

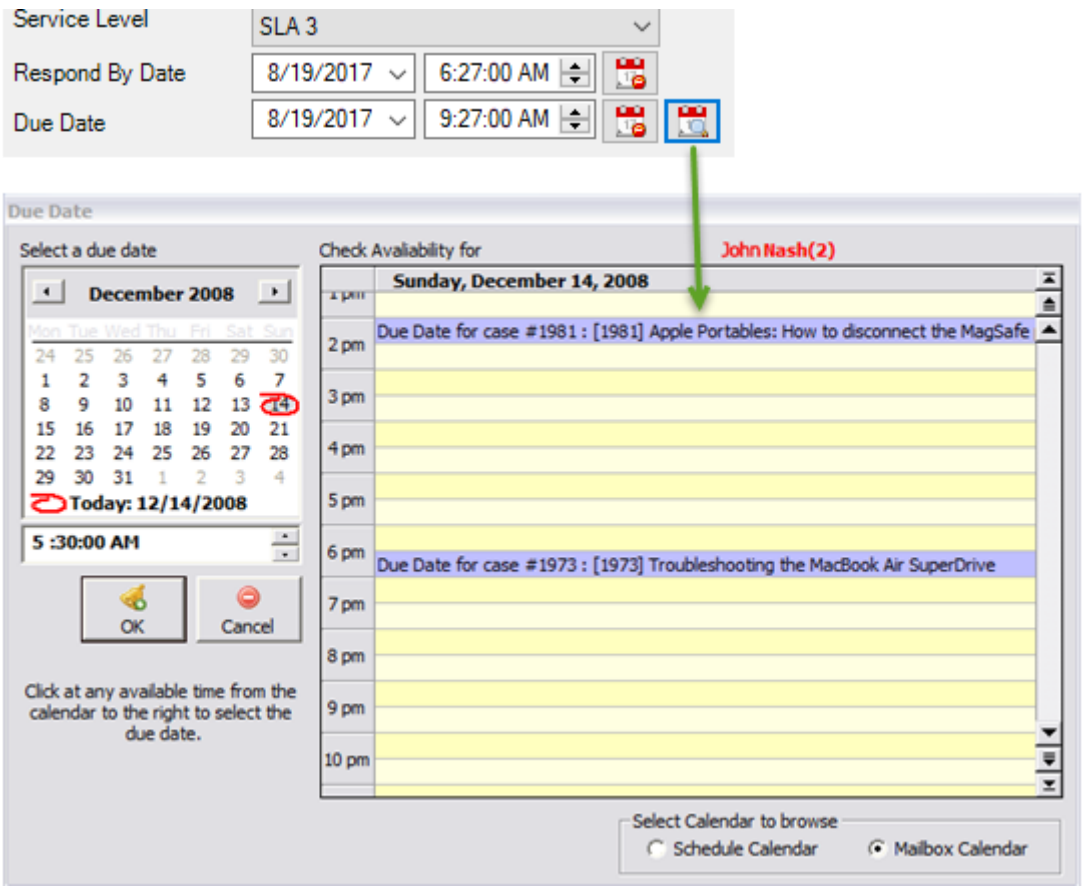
If the 'Hours' option is selected, the add-in will display the total time spent on a case in **HH:MM** format.



11 **Show non-due date appointments when browsing the calendar**

Helpdesk managers who assign due date to cases can look up the technician's personal mailbox calendar for time availability and schedules from within the Outlook case form. By default, only the due-date specific appointments in the calendar are visible to due date assigners.

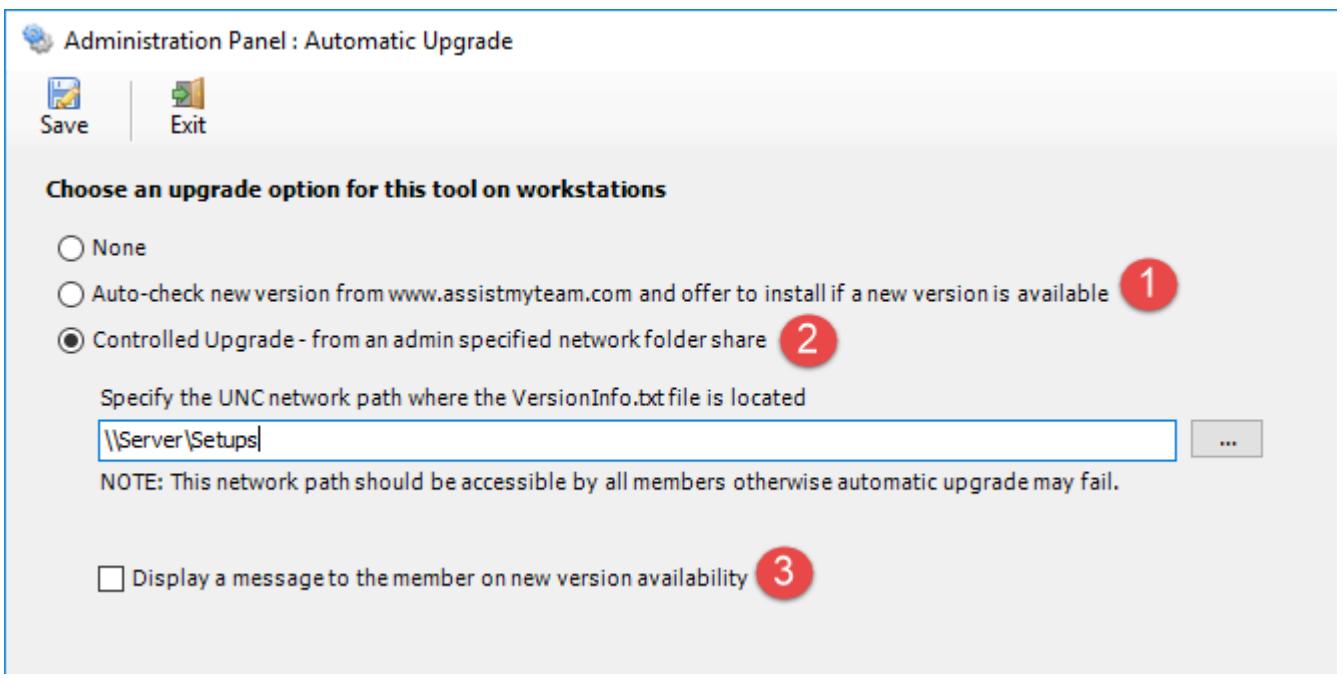
Enable this option to show all appointments (e.g. personal appointments) available to the assigners when the technician's calendar is accessed for schedule availability chart from within the case form.



NOTE: This feature only works when the manager has enabled **'Automatically add due date appointment into the technician's mailbox calendar'** in *Team Helpdesk Manager > Automation Options > Technicians* tab and that the particular managers/technicians has permission over the assigned technician's mailbox or calendar.

4.17 Upgrade Options

With this feature, when a new updated version of Team Helpdesk is available, you can perform upgrade of the Team Helpdesk agent add-in on each technician's system automatically. If enabled, it checks for new version availability at Outlook startup.



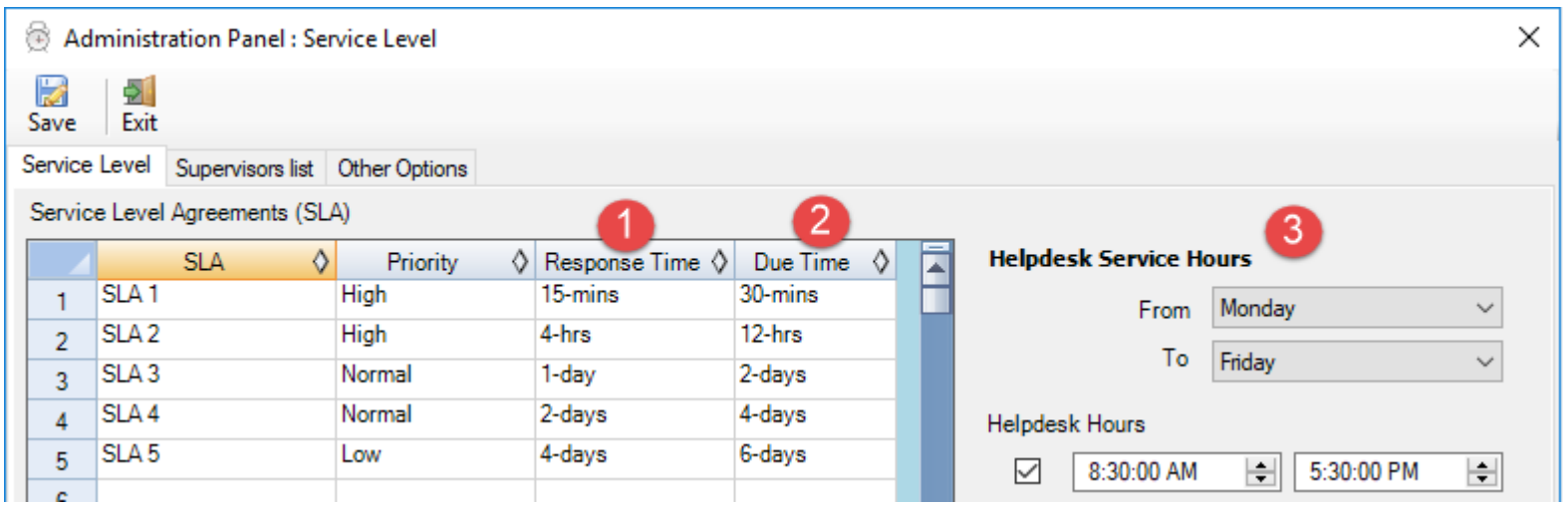
1 **Auto-check of new version from** www.assistmyteam.com **and offer to install if a new version is available**
Check this option to enable automatic check of new version of the Team Helpdesk Agent add-in from the product website at www.assistmyteam.com during Outlook startup. If a new version is available, you will be prompted if you want to open the download page.

2 **Controlled Upgrade – from an admin specified network folder**
Check this option to enable automatic upgrade of Team Helpdesk Agent add-in from a network path, which is specified by the administrator. In the text box, specify the network shared folder where the Agent setup files (*TeamHelpdeskAgentSetup_xXX.exe and VersionInfo.txt*) are placed. When new versions are available, all you need to do is download the latest version from the Team Helpdesk download page (www.assistmyteam.net/TeamHelpdesk/Download.asp), and then place the *TeamHelpdeskAgentSetup_xXX*.exe and *VersionInfo*.txt into this network folder.

3 **Display a message to the member on new version availability** - This would display a message about new version availability if one is found.

4.18 Service Level Agreements (SLA)

A service-level agreement (SLA) is a contract between a service provider such as a company helpdesk and a customer that specifies, usually in measurable terms, what services the provider will furnish. It is now widely accepted that service provision and receipt should be governed by an agreement. This is essential to define the parameters of the service, for the benefit of both the provider and the recipient. More importantly, it should have a guaranteed response or resolution time for incidents (trouble tickets). *For example, a SLA between Webhosting Company and its customers could be –2 hrs. response time*. In Team Helpdesk, Service Level Agreement (SLA) is designed around two dimensions 'Response Time' and 'Due Time'.



1 **Response Time** - duration within which the assigned technicians of the case should have responded to the caller for the first time (after the case was logged). When a SLA is enforced to a case, the response time of that SLA would be adjusted (added) to the 'Respond by Date' field. If the case was not responded within the stipulated SLA response time, a SLA breach (i.e., *a response time lapse*) would occur and an automated notification would be sent to the supervisors.

2 **Due Time** - duration within which the assigned technicians should have closed (mark complete) the case. When a SLA is enforced to a case, the due time of that SLA would be adjusted (added) to the 'Due Date' field. If the case was not closed i.e., mark competed) within the stipulated SLA due time, a SLA breach (i.e., *a due time lapse*) would occur and an automated notification would be sent to the supervisors.

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

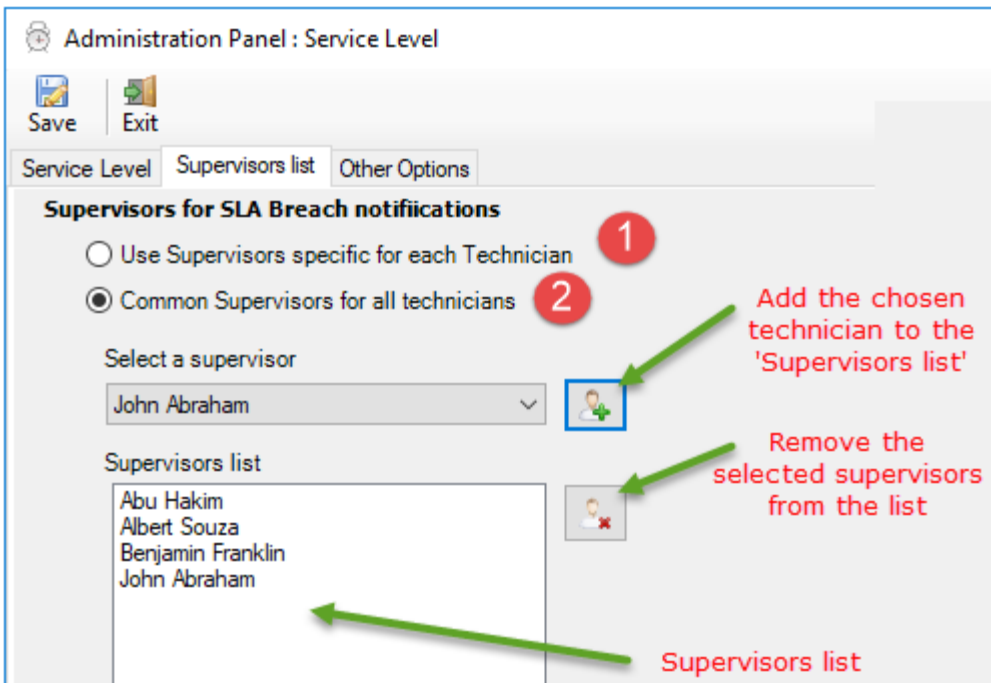
Once a service days and hours are specified, respond by date or due date assignment will take note of the helpdesk unavailability accordingly. When specifying a SLA to a support case, the response time or due time would be added to the current date/time, plus any helpdesk off-hours such that, the response by date or due date is always set within the service hours band. So, no longer you or other technicians would be sent respond by date or due date lapse or SLA breach automated alerts in off hours of the helpdesk.

Team Helpdesk System allows helpdesk managers to set and maintain SLA standards in the organization. Within the Outlook case form, managers can enforce or change a SLA on a support case based on escalation requirements. Additionally, SLAs can be assigned automatically to newly created cases. For example, in Customer Web Service (CWS) website, end-users submitting support request via a webform would select a problem category and type along with other information. When the submitted support request is processed in Team Helpdesk in Outlook, the default SLA specified for that combination of Problem Category and Type fields is enforced to the case.

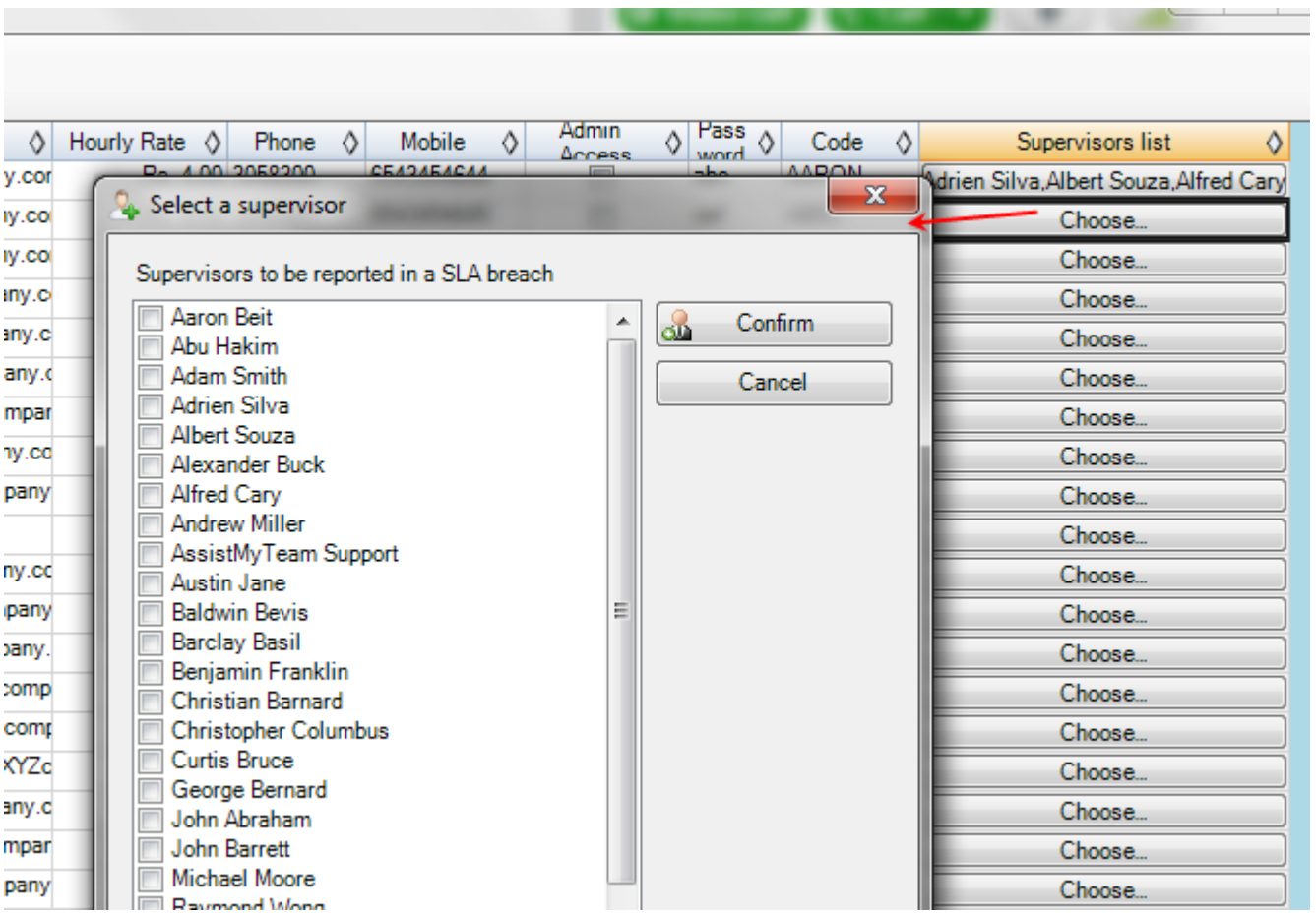
As a support case approaches an SLA Management breach, the case item appears red in the Outlook view, as well as escalation alerts, either as email or SMS message are sent out to the concerned technicians and supervisors. This prevents any issue or request from ever falling through the cracks and allows your team to effectively stay on top of any support cases approaching the breach of a Service Level Agreement.

SLA Supervisors

To keep a tap on timely resolution of cases, the manager can enable notification alerts to supervisors when new cases are generated, or when new technicians are assigned or when there is a SLA breach etc.



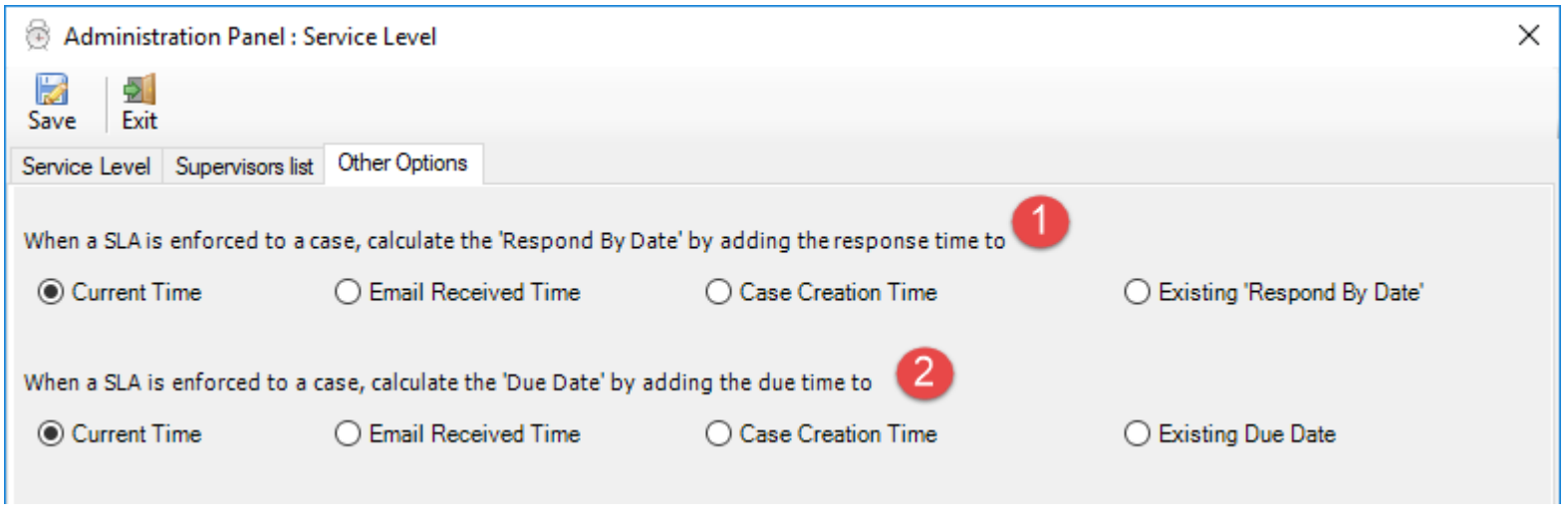
1 With the first option **'Use Supervisors specific for each Technician'**, you can define supervisors for each technician in *Team Helpdesk Manager > Technicians List* panel.



And when a case triggers a SLA breach, the supervisors defined for that assigned technicians (above) will be notified for escalation.

2 With the second option **'Common Supervisors for all technicians'**, you can use global fixed supervisors, so that for every SLA breach, the same set of supervisors are notified.

SLA Calculation



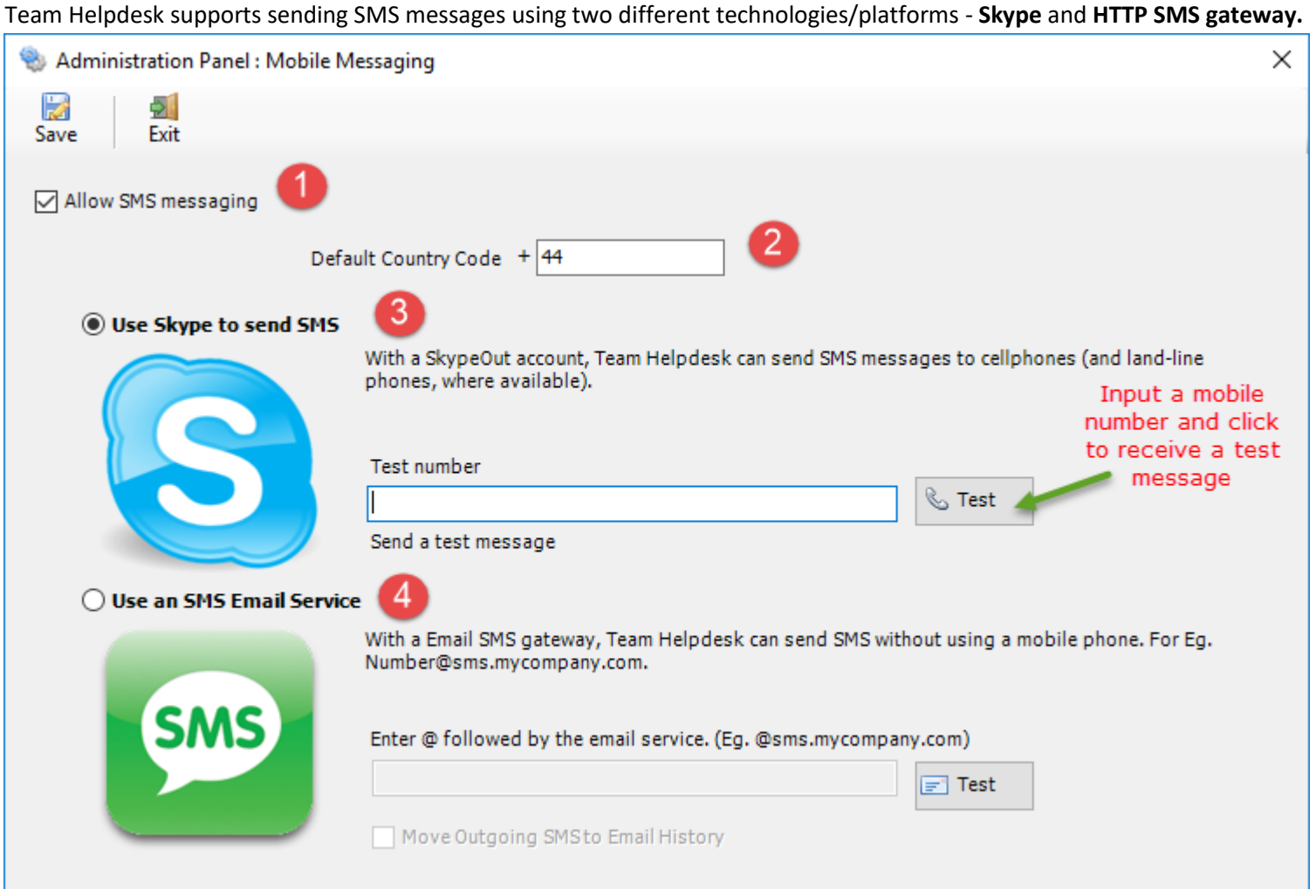
1 By default, when a SLA is applied to a case, the helpdesk add-in calculates the 'respond by date' field by computing the SLA response time to the **current date/time**. But you can change that so the SLA response time is applied to the request **received time of the email**, or **date/time when the case was generated** or simply added on top of **an existing 'respond by date'** (if it is not empty).

2 By default, when a SLA is applied to a case, the helpdesk add-in calculates the 'due date' by computing the SLA due time to the **current date/time**. But you can change that so the SLA due time is applied to the request **received time of the email**, or **date/time when the case was generated** or simply added on top of **an existing 'due date'** (if it is not empty).

4.19 Mobile Messaging

Short Message Service or SMS, is used by billions of people and is the most pervasive use of data on mobile phones. SMS is convenient and cost effective for a number of reasons. When compared with the cost of airtime for voice calls or wireless web access, SMS is a real bargain and messages are immediately delivered directly to your phone. Team Helpdesk system supports dispatching automating alerts to mobile devices of the callers or technicians in the form of SMS messages.

Team Helpdesk supports sending SMS messages using two different technologies/platforms - **Skype** and **HTTP SMS gateway.**

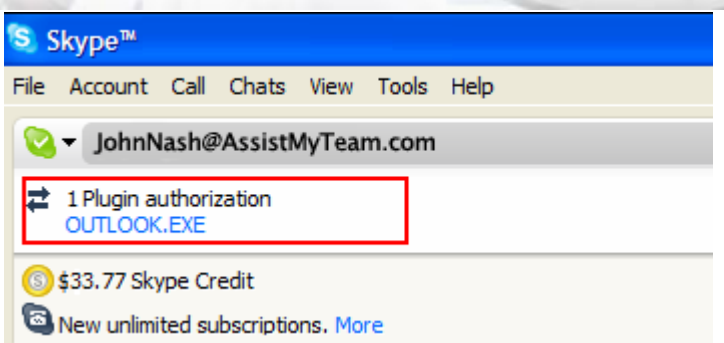


1 **Allow SMS Messaging**
By default, SMS messaging is disabled in Team Helpdesk. Check this option to enable SMS messaging for your helpdesk.

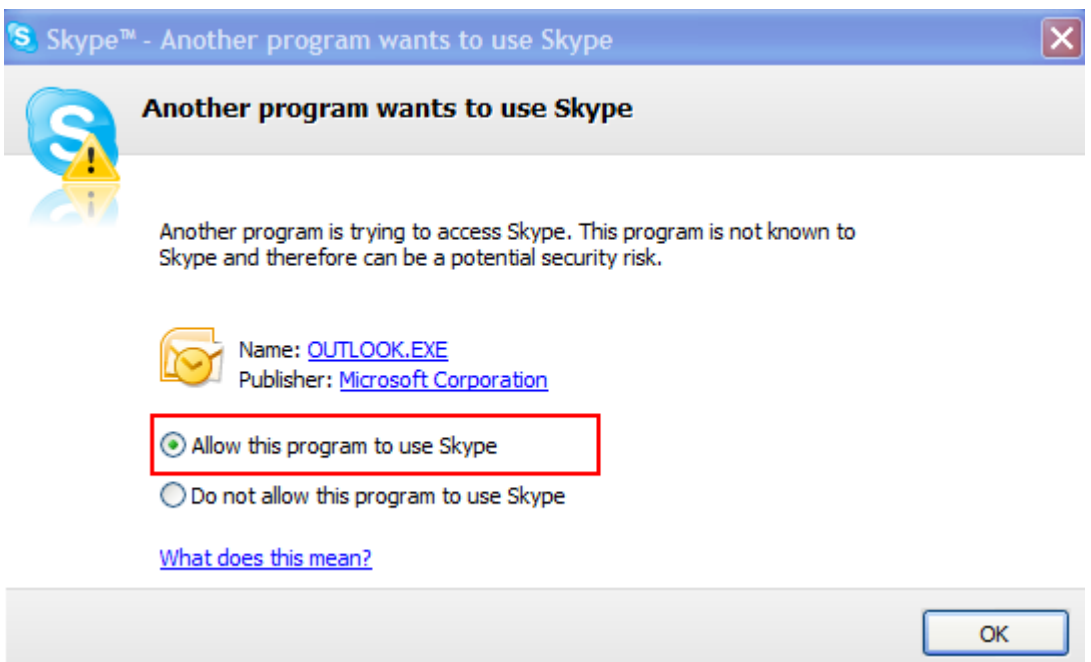
2 **Default Country Code**
Input the ISD code of your country. For example, for United States, it is **1** and for United Kingdom, it is **44**. For more on country code, click here.

3 **Use Skype to send SMS**
Sending SMS via Skype is the simplest way of enabling support for SMS messaging functionality in Team Helpdesk. It is cheap, convenient, seems relatively reliable too! Every technician needs to have Skype installed with valid credits to send SMS to mobile phones. There are no specific settings that needs to be configured in Skype. The only requirement is that it should be running with valid credits. Skype is seamlessly integrated with Team Helpdesk i.e., the sending of SMS via Skype is done programmatically (through Skype API) which means the technician does not perform any manual steps during the process. The technicians won't even notice the Skype is being used during the whole process of SMS messaging. For more on Skype SMS, visit the Skype website at https://www.skype.com/en/features/sms/.

For the first time, when a technician tries to send an SMS (or call) to a mobile or phone number, Skype would automatically pop up a message asking you if to allow the Outlook Application (Outlook.exe) access to that Skype functionality.



You will have to select the first option **'Allow this program to use Skype'** and then click OK to continue. This setting is performed only one-time per user; subsequent access happens seamlessly to the technicians, i.e., Skype remembers the selected option and would allow access as long as the user don't explicitly unset it under *Skype > Tools > Advanced > 'Manage other programs access to Skype'*.

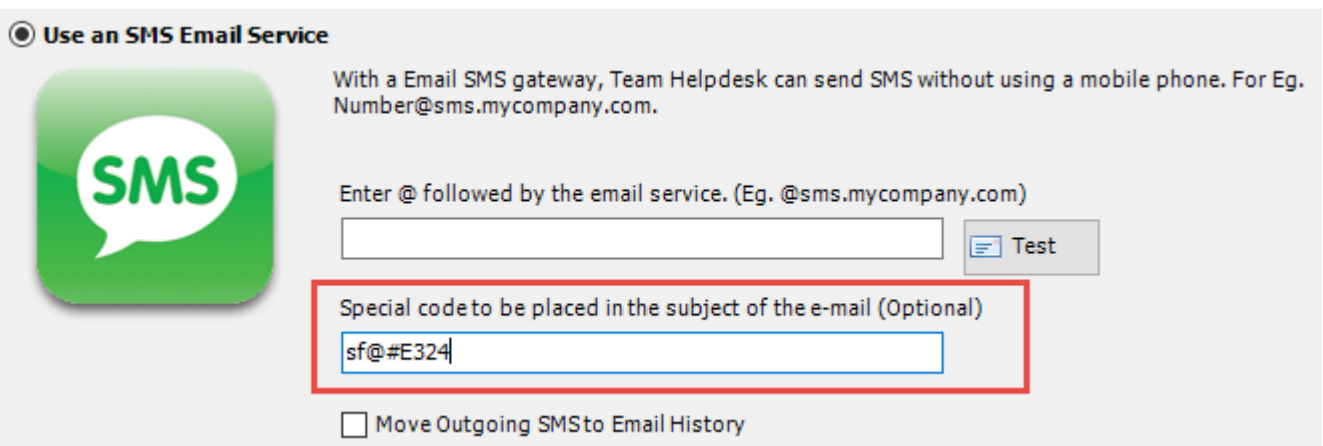


4 **Using an Email SMS Service**

Choose this option if you have an Email to SMS gateway service that allows you to turn your email into a text message without any extra effort. All that is needed is to send an email to mobile-number@SMS-SERVICE-DOMAIN.com

For instance, 933332323@someGateway.com where **933332323** is the mobile number to which the SMS will be sent to and **someGateway.com** is the SMS gateways service.]

With this SMS option enabled, Team Helpdesk add-in would then direct all SMS alerts (if enabled) in the form of emails to **mobile-number@[SMS-SERVICE-DOMAIN.com]** after which the SMS gateway service take over to translate email to SMS before delivering it to the mobile number.



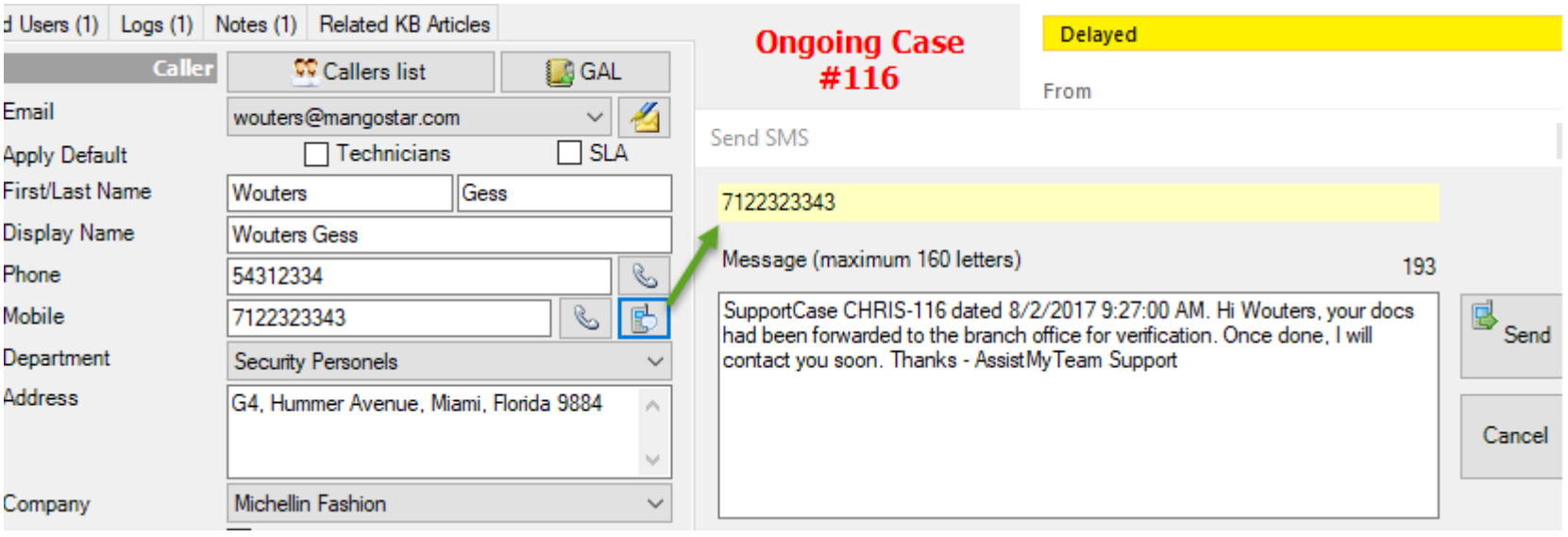
Special Code in Subject - If your SMS service provider requires a special code in the email subject for recognition or authentication purpose, you can input it in the text box (outlined in red above). Doing so, the add-in will put this special code in the subject of the email before sending it to the SMS provider account.

SMS Gateways - If your organization does not have an in-house Email to SMS service, there are plenty of commercial Email to SMS service providers on the web. For example, SMS Gateways shown below are for U.S. carriers only.

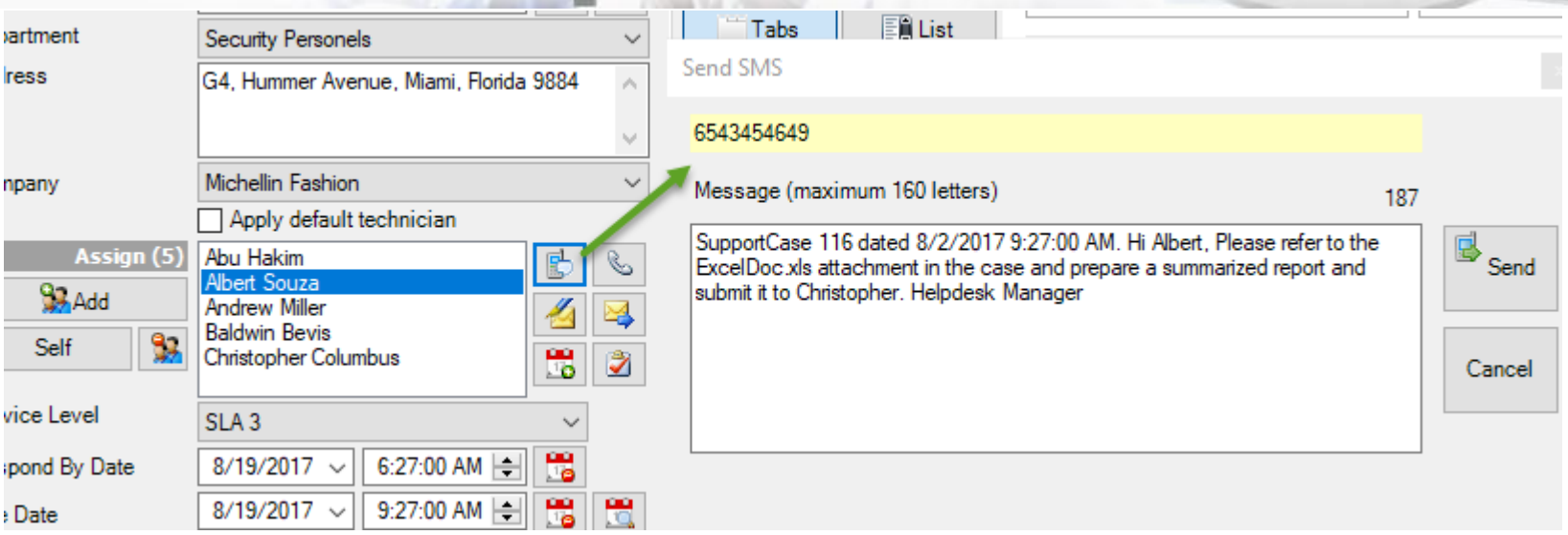
SMS Gateways	
Alltel Wireless	*mobile-number*@message.Alltel.com *mobile-number*@text.wireless.alltel.com
AT&T Wireless	*mobile-number*@txt.att.net
AT&T Mobility (formerly Cingular)	*mobile-number*@cingularme.com *mobile-number*@mobile.mycingular.com
Boost Mobile	*mobile-number*@myboostmobile.com
Cricket	*mobile-number*@sms.mycricket.com
Metro PCS	*mobile-number*@mymetropcs.com
Sprint (PCS)	*mobile-number*@messaging.sprintpcs.com
Sprint (Nextel)	*mobile-number*@page.nextel.com
U.S. Cellular	*mobile-number*@email.uscc.net
Verizon	*mobile-number*@vtext.com
Virgin Mobile	*mobile-number*@vmobl.com

Sending SMS to a caller/technician

Once a SMS option is configured, technicians then can start sending self-composed SMS to caller or other technicians based on the helpdesk requirements. For instance, from the case form, technician can click the 'SMS' button (mobile field of the caller) to send a custom message to the caller.

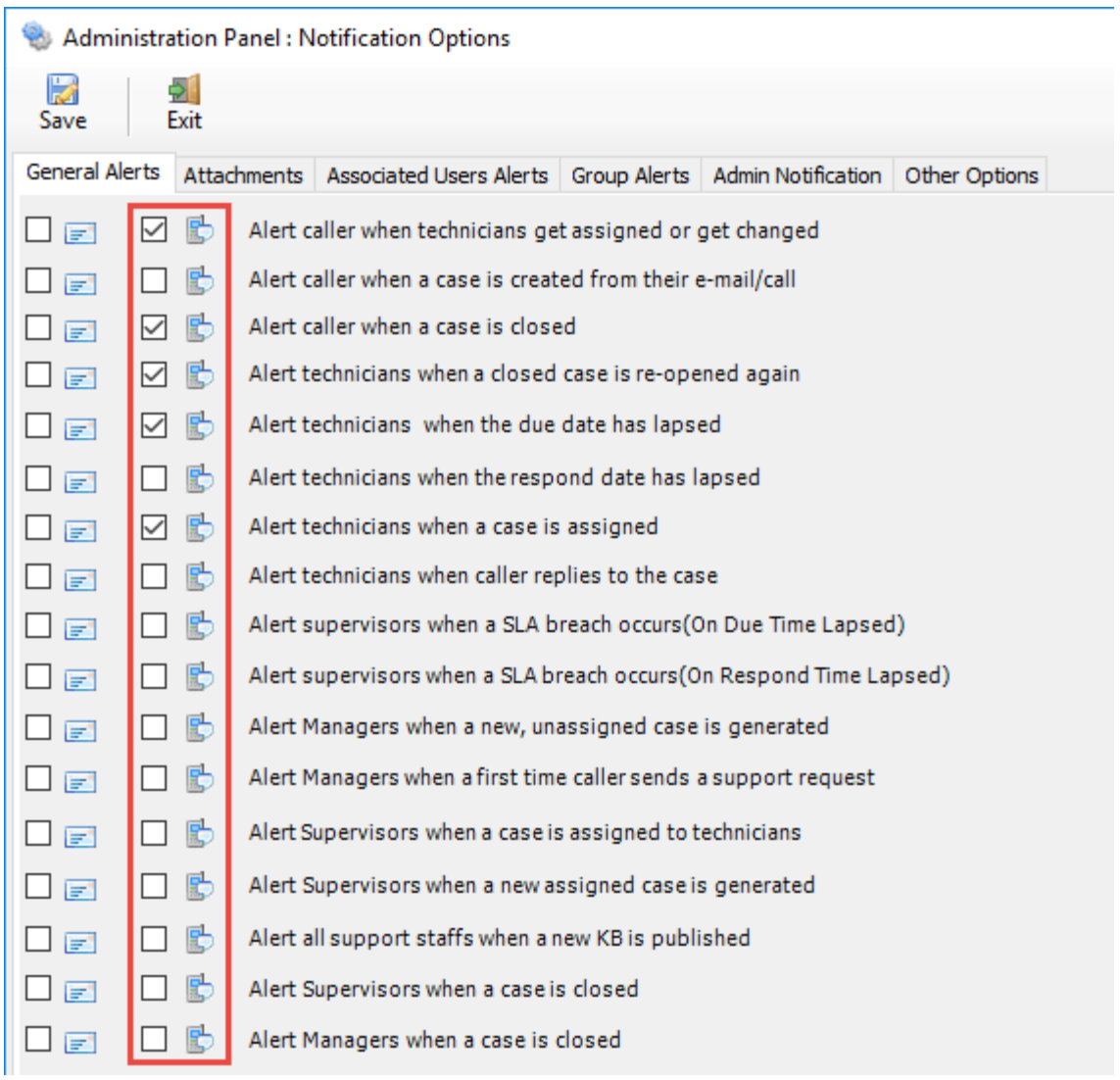


And to send a SMS message to one of the assigned technician, select the technician from the list, and click the 'SMS' button.



Automating SMS reminders

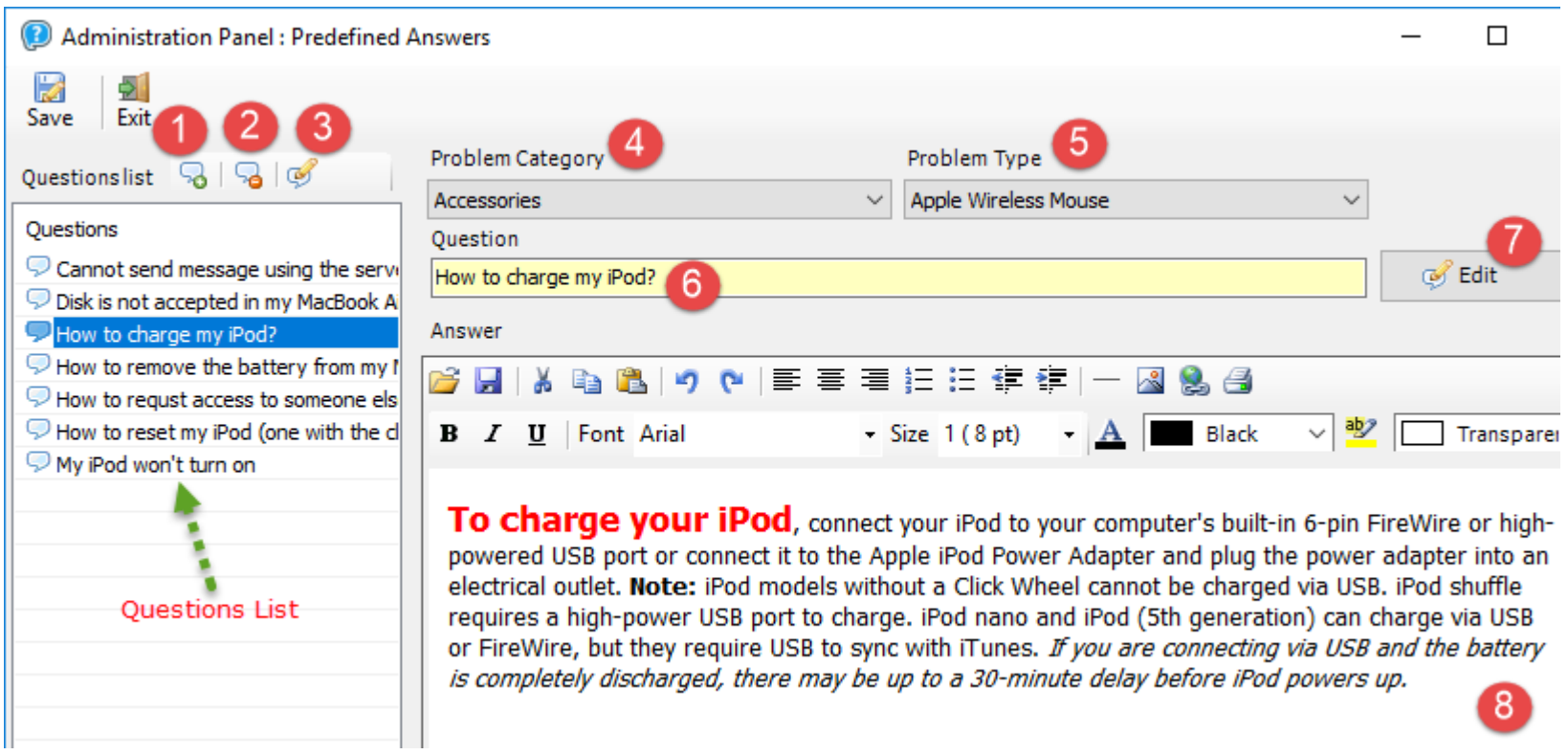
Team Helpdesk can also send out automatic SMSs based on different helpdesk events such as when a case is created, changed or resolved, or when a technician is assigned to the case, or when the due date has lapsed etc. This whole exercise is transparent to the technicians and needs no manual intervention from the technicians. For more on automatic notifications, refer to *Team Helpdesk Manager > Notification Options > General Alerts* tab.



4.20 Predefined Answers (FAQs)

There might be times when technicians just need to answer briefly to a frequently asked question from callers. Instead of framing the answer over and over again, just imagine how easy it would be if you can compose a predefined answer lists with relevant answer categorized by problems. With such a setup, it is very easy to reply to a support request email by just selecting the appropriate predefined answer and embedding it to the email.

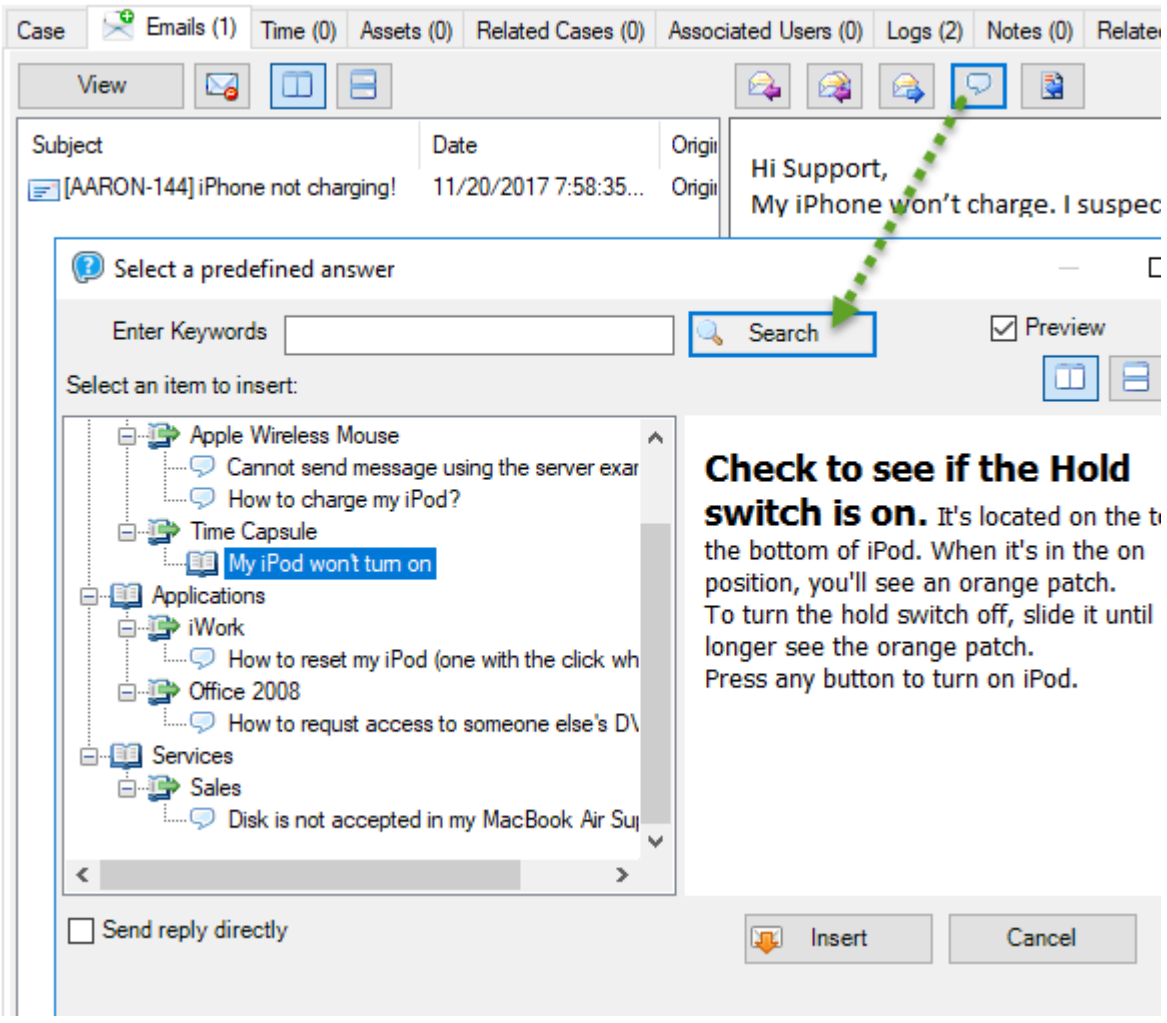
You can maintain a list of predefined answers (FAQ) to most asked help desk questions. These answers can then be used to reply to frequent asked questions quickly without needing to compose redundant information again and again. Each predefined answer can be specified to belong to a problem category and type. This is particular helpful to build an organized library of answers that is easy to find in time of need.



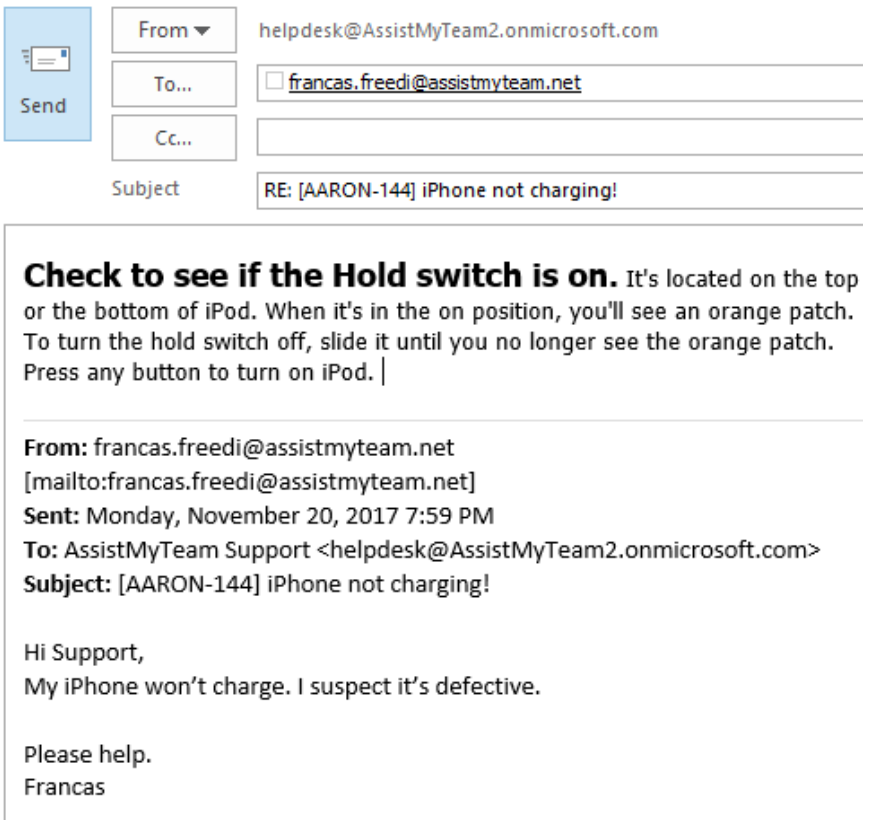
1. Frame a new question and answer.
2. Edit the selected question and answer.
3. Remove the selected question and answer from the list.
4. Problem Category for which this question and answer belongs to. You can choose a category from the drop-down list. To add or modify categories, refer to *Team Helpdesk Manager > Problems List > Categories* tab.
5. Problem type for which this question and answer belongs to. You can choose a type from the drop-down list. To add or modify types, refer to *Team Helpdesk Manager > Problems List* tab.
6. Frame your question here.
7. Click to edit the existing question. This will allow you to modify the existing question in an input box prompt.
8. The detailed answer of the question that address an issue related to the problem category or type. A WYSIWYG editor is available to help you format the content of your answer. You can change the font, style, paragraph etc.

How are Predefined Answers Used?

The predefined answers list is most prominently used in the outlook case form. When launched, the predefined answers dialog box displays questions which are arranged and grouped in a hierarchical tree (e.g. *problem categories and types*) allowing the technician to select an answer and reply to the caller.



And the chosen answer (FAQ) is inserted to a new reply, ready for dispatch to the recipient (e.g., caller of the case).



The predefined answers can also be used to select an appropriate answer and reply directly to emails (outside of Team Helpdesk folders) say in your Inboxes. In fact, they are available in appointments, tasks as well.

Support Request

Resolution

Team Helpdesk for Outlook & SharePoint

Settings | New Case | Convert to case | Add to existing case | Create KB | Reply with a KB | Reply with a FAQ | Reply All with a FAQ | Search Cases | Navigate To | My Cases | New Email

Team Helpdesk (10.1.4.247)

All | Unread | Search Current Mailbox

SUBJECT	MODIFIED	RECEIVE
Date: Last Week		
iPod not charging! Please Help	Tue 11/21/2017 8:38 P...	Sat 11/1.
How to use Remote Disc to share DVDs or CDs on a Mac	Tue 11/21/2017 8:30 P...	Sat 11/1.

Select a predefined answer

Enter Keywords | Search | Preview

Select an item to insert:

- Accessories
  - Apple TV
    - How to remove the battery from my MacBoc
  - Apple Wireless Mouse
    - Cannot send message using the server exar
    - How to charge my iPod?
  - Time Capsule
    - My iPod won't turn on
- Applications
  - iWork
    - How to reset my iPod (one with the click wh
  - Office 2008
    - How to requst access to someone else's D\
- Services

To charge your iPod, connect your iPod to your computer's built-in 6-pin FireWire or high-powered USB port or connect it to the Apple iPod Power Adapter and plug the power adapter into an electrical outlet. **Note:** iPod models without a Click Wheel cannot be charged via USB. iPod shuffle requires a high-power USB port to charge. iPod nano and iPod (5th generation) can charge via USB or FireWire, but they require USB to sync with iTunes. *If you are connecting via USB and the battery is completely discharged, there may be up to a 30-minute delay before iPod powers up*

Send reply directly | Insert | Cancel

Send

From: info@assistmyteam.net

To: rob@somecompany.net

Cc:

Subject: iPod not charging! Please Help

To charge your iPod, connect your iPod to your computer's built-in 6-pin FireWire or high-powered USB port or connect it to the Apple iPod Power Adapter and plug the power adapter into an electrical outlet. **Note:** iPod models without a Click Wheel cannot be charged via USB. iPod shuffle requires a high-power USB port to charge. iPod nano and iPod (5th generation) can charge via USB or FireWire, but they require USB to sync with iTunes. *If you are connecting via USB and the battery is completely discharged, there may be up to a 30-minute delay before iPod powers up.*

-----Original Message-----
From: rob@somecompany.net [mailto:rob@somecompany.net]
Sent: Saturday, November 18, 2017 5:44 AM
To: info@assistmyteam.net
Subject: iPod not charging! Please Help

My iPod Touch won't charge at all. Please help.

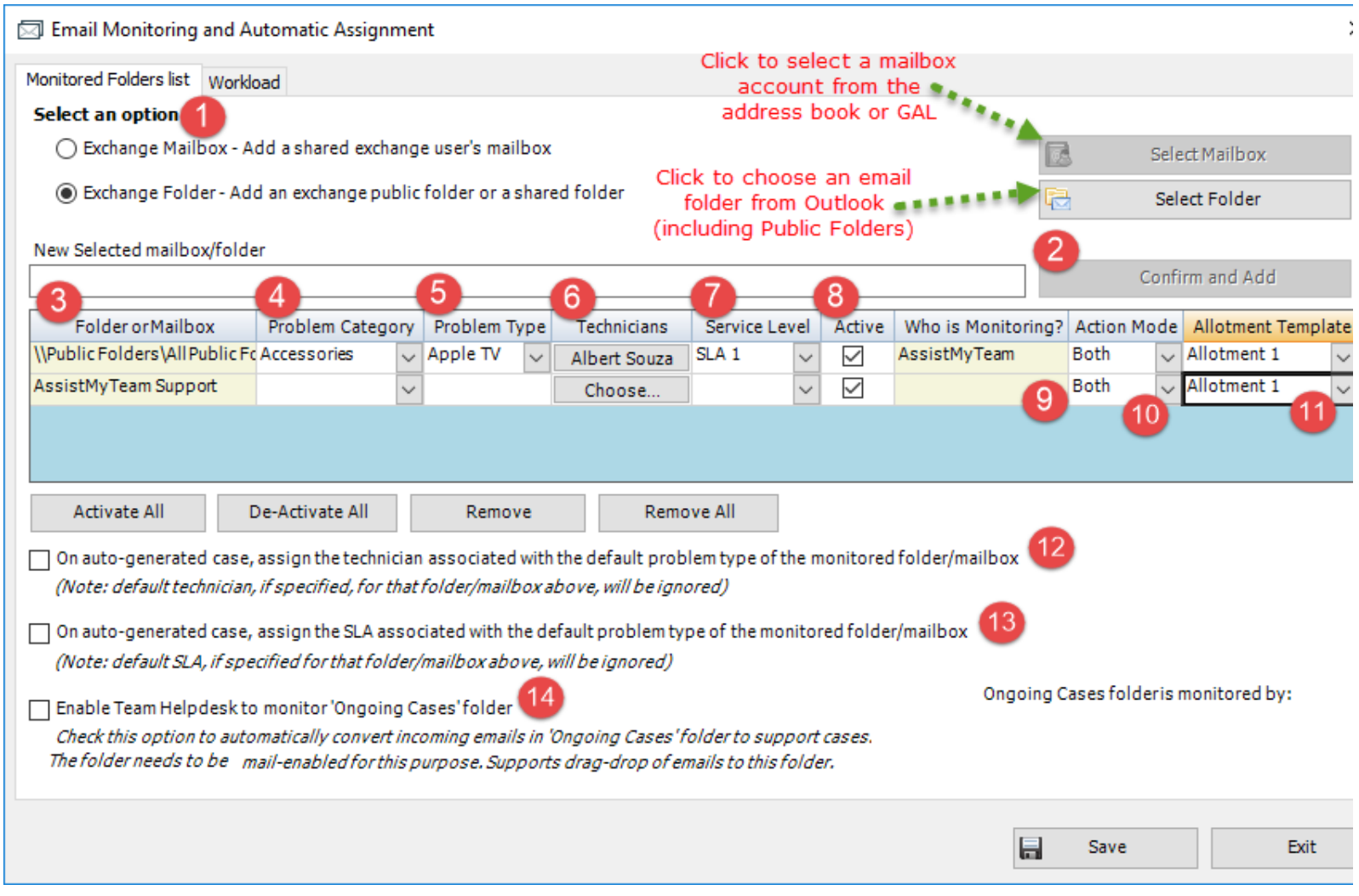
Rob

4.21 Automatic Email Monitoring and Assignment

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

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

Additionally, Team Helpdesk can be extended to even assign default technicians to newly logged support cases on the fly based on the linked relationship between technicians and the prefilled fields such as sender and problem areas. This automates the support case logging and assignment entirely on its own. The generated support cases are then stored under the exchange folder making it available to all members of your team for collaboration. Any file attachments will be automatically attached to the problem case (Outlook item); making distribution of inbound requests simple and informative. This way, all support submissions are captured and centralized in order to execute efficient and effective customer service.



1 Choose a **mailbox** account or email **folder** (such as an Exchange folder or Public Folder) from which Team Helpdesk add-in will raise new cases from incoming emails automatically.

2 Once a mailbox account or email folder is chosen, click '**Confirm and Add**' to the list for automation.

3. The folder or mailbox that has been chosen for automation.

4. Select a particular problem category from the drop-down list that will be set to the new case as default value for 'Problem Category' field.

5. Select a particular problem type from the drop-down list that will be set to the new case as default value for 'Problem Type' field.

6. Choose technicians from the address book (or GAL) that will be assigned as default technicians to the new case raised from this mailbox or email folder.

7. Select a suitable service level (SLA) from the drop-down list that will be set to the new case as default value for 'Service Level' field.

8. Enable or disable the case automation workflow for the particular mailbox account or email folder. You may want to disable the automation process temporarily on a particular mailbox or folder if for instance, a maintenance or migration is planned.

9. This column shows which particular user (of Team Helpdesk Manager add-in) is responsible for automation.

10. The **'Action Mode'** consists of 3 possible values: **New**, **Update** and **Both**.

    A) If **'New'** option is selected, Team Helpdesk will automatically raise new support cases from new incoming emails from the particular monitored mailbox or folder. With this option, only those emails without the case ID in the subject would be processed to generate new cases. Those with Case ID info in the subject will remain unprocessed.

    B) If **'Update'** option is selected, Team Helpdesk will only process new incoming emails that have the case ID in the subject and accordingly, it will update the associated case item (in the Ongoing Cases or Resolved Cases folders). Emails without the Case ID information in the subject will remain untouched. This is handy if the mailbox or folder contains or receives emails that are unrelated to the helpdesk.

    C) If **'Both'** option is selected, Team Helpdesk will update the existing cases as well as generated new tickets from new incoming emails (depending on the availability of the Case ID in the subject of the email). This is the default selected option when you add a new mailbox or folder for automation.

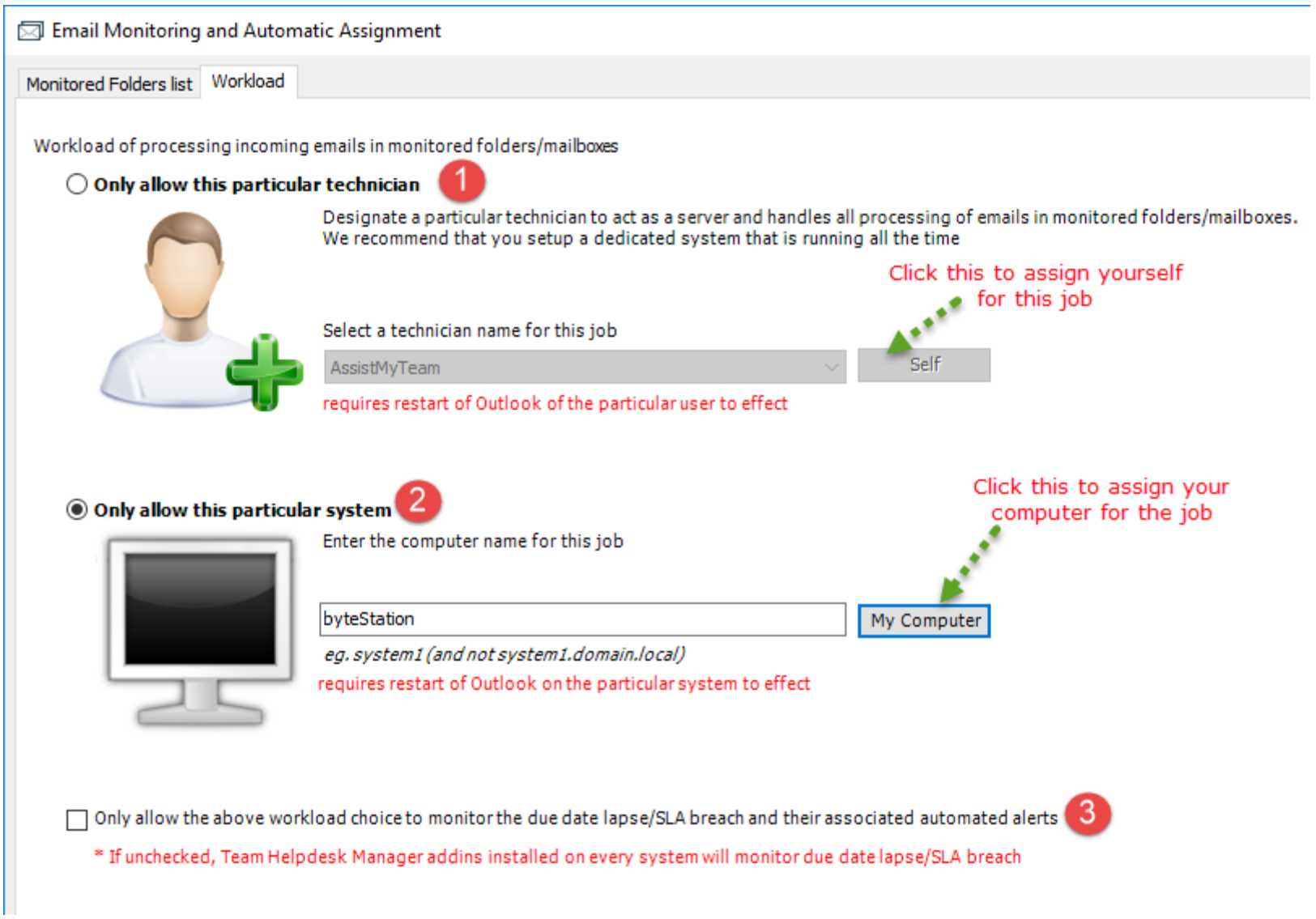
11. You can specify a different auto-response to caller for cases raised from each monitored mailbox. For instance, if someone sends an e-mail to UK.Support@myCompany.com, you would want to inform the customer that their e-mail will be responded to within 2 hours between 9am and 5:30pm UK time. If they send a new case to US.Support@myCompany.com, you can inform the customer that their e-mail will be responded to within 3 hours between 9am and 5:30pm Eastern Standard Time.

12. Enable this option to assign technicians that are associated to the problem type of the monitored folder to the newly generated cases

13. Enable this option to enforce service level that are associated to the problem type of the monitored folder to the newly generated cases

14. Check this option to automatically convert incoming emails in 'Ongoing Cases' folder to support cases. For this feature to work, the 'Ongoing Cases' folder needs to mail-enabled. You can also drag and drop emails from other folders to the 'Ongoing Cases' folder and the add-in will automatically process and convert those emails to cases.

Workload – Assign responsibility for Case Automation



In Team Helpdesk, you need to specify which helpdesk manager add-in would be responsible for monitoring and converting the emails from the admin chosen mailboxes/folders to cases. You can choose a particular technician or a dedicated system (that has the manager installed) for this automation job.

1. Choose this option to assign a particular technician whose helpdesk manager add-in will be responsible for monitoring and processing any incoming emails in the chosen mailboxes/folders to cases.

   NOTE: If you want to set yourself, just click the '**Self**' button (located on the right)

2. Choose this option to assign a dedicated system that has helpdesk manager add-in installed as responsible for monitoring and processing any incoming emails in the chosen mailboxes/folders to cases. Enter the computer name without the domain information. For example, if the full qualified system name is *system1.domain.local* only enter '**system1**'.

   NOTE: If you want to set your current system, just click the '**My Computer**' button (located on the right)

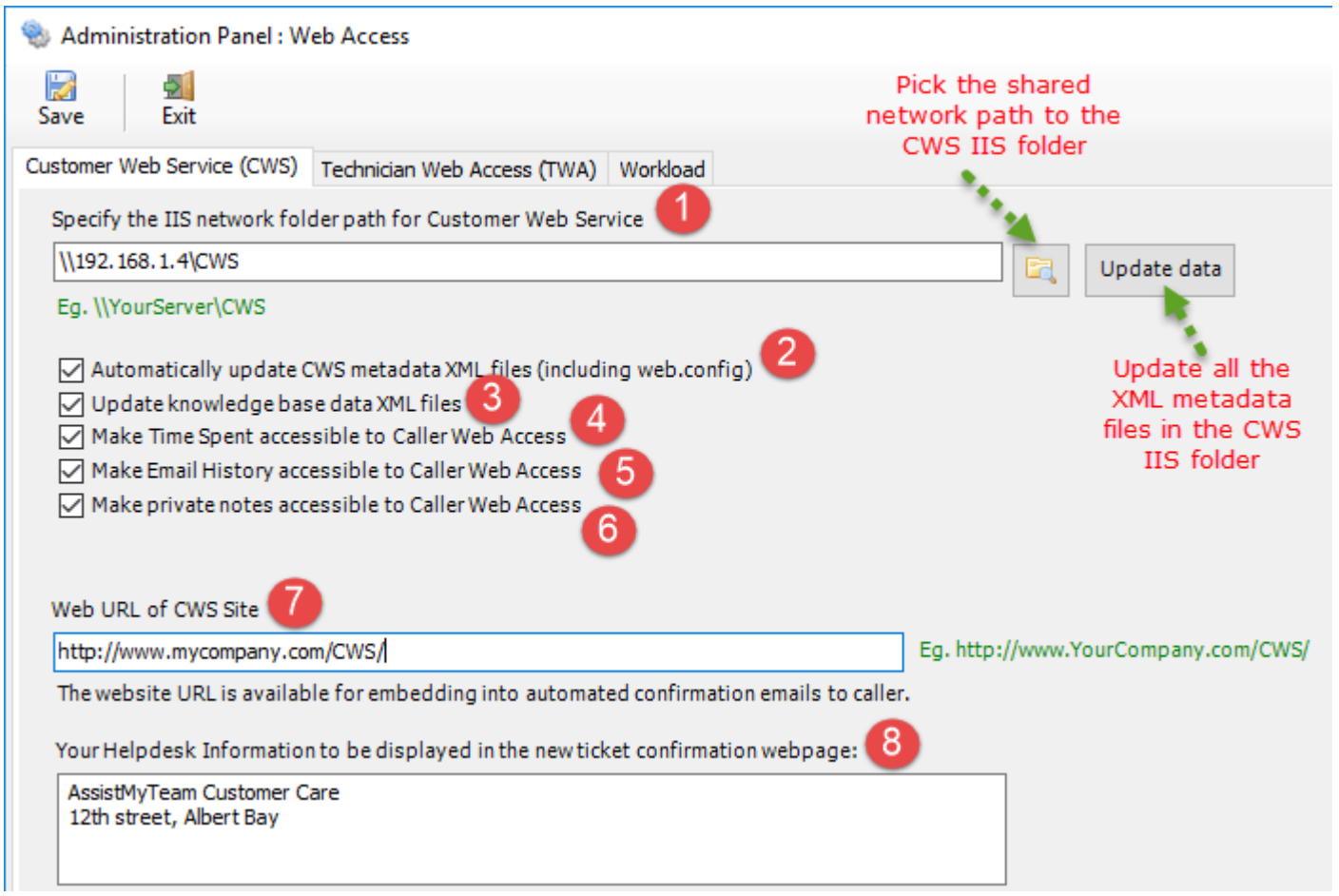
3. Enable this option so that the manager add-in of the chosen user or system for ticket automation is also responsible for monitoring due date lapse and SLA breach and consequently sending of the associated automated notifications to technicians and supervisors.

4.22 Web Access

For remote technicians who cannot access and work on support cases in the public folder or shared folder of the company's exchange server or to allow general customers (end-users) to submit online support requests, Team Helpdesk provides them an easy web interface accessible through a web browser on the internet. For this feature, the web access files are placed under a new virtual directory in your IIS server with appropriate permission over the web folder. Technicians and to some extent, existing callers, will be prompted to enter user credential when logging in to the web access website.

Customer Web Service

The Customer Web Service (or **CWS** which we will refer to often in this manual) is an AJAX enabled ASP.NET 2.0 website. It provides a rich set of tools and interactivity with the live helpdesk ticket data stored in the exchange server. Your customers can submit new support requests via a webform, check status of a support case and check out the knowledge base for possible workarounds to their problem before requesting for support. Furthermore, existing callers can login to the Caller Web Access (CWA) * website to track all their support cases, escalate or withdraw ongoing case, re-open closed case etc.



1 Here, you need to specify the shared network path of the CWS folder (which is located in your IIS **C:\inetpub\wwwroot** parent folder on your windows server). To save/update the CWS specific XML metadata files from Outlook to the shared network web-enabled folder (on the server), it needs to know the full UNC folder path. If the network folder resource requires a network credential, then you will be prompted to enter one.

NOTE: You need to share this CWS folder such that all technicians can have access to it from their respective systems within the office network.

2 **Automatically update CWS metadata XML files (including web.config)**
Enable this option to allow helpdesk add-in to update the CWS specific settings metadata automatically when there is any change in the Team Helpdesk settings. The Team Helpdesk lists and settings (e.g. problem categories and types) would surely change/update in due time. The helpdesk manager would need to update the web service XML metadata files accordingly, so that data used in the web service application is in synch with that in Outlook. Though the helpdesk manager can manually update the data files for web service, it would be a tedious task if the settings in Outlook are to change every now and then. In such scenario, it is recommended to allow helpdesk add-in to automatically update CWS specific metadata XML files in the shared network folder, when there are any changes in the lists and settings in Outlook.

3. **Update Knowledge base data XML files**
   Check this option to publish or update knowledge base data XML files in the web-enabled CWS network folder.

4. **Make the Time Spent accessible to Caller Web Access (CWA)**
   Enable this option so that when callers are logon to the Caller Web Access site, they can see the time spent details entered by technicians in the cases allotted to them.

5. **Make Email History accessible to Caller Web Access**
   Enable this option so that when callers are logon to the Caller Web Access site, they can see the Email communication history between them and the helpdesk in the cases allotted to them.

6. **Make private notes accessible to Caller Web Access**
   Enable this option so that when callers are logon to the Caller Web Access site, they can see private notes entered by technicians in the cases allotted to them.

7. **Web URL of CWS site**
   Enter the full web friendly URL (e.g. http://www.yourcompany.com/CWS/) that is accessible by your customers from the Internet or Intranet. What you entered here will be available for embedding into email template (i.e., Placeholder variable **SCO_WEBACCESS_URL)** which would be then sent to the customer after a case is raised from their support request email or call.

8. Enter the confirmation information from the helpdesk to be displayed in the webpage of CWS when a new case is submitted successfully by a customer through the webform.

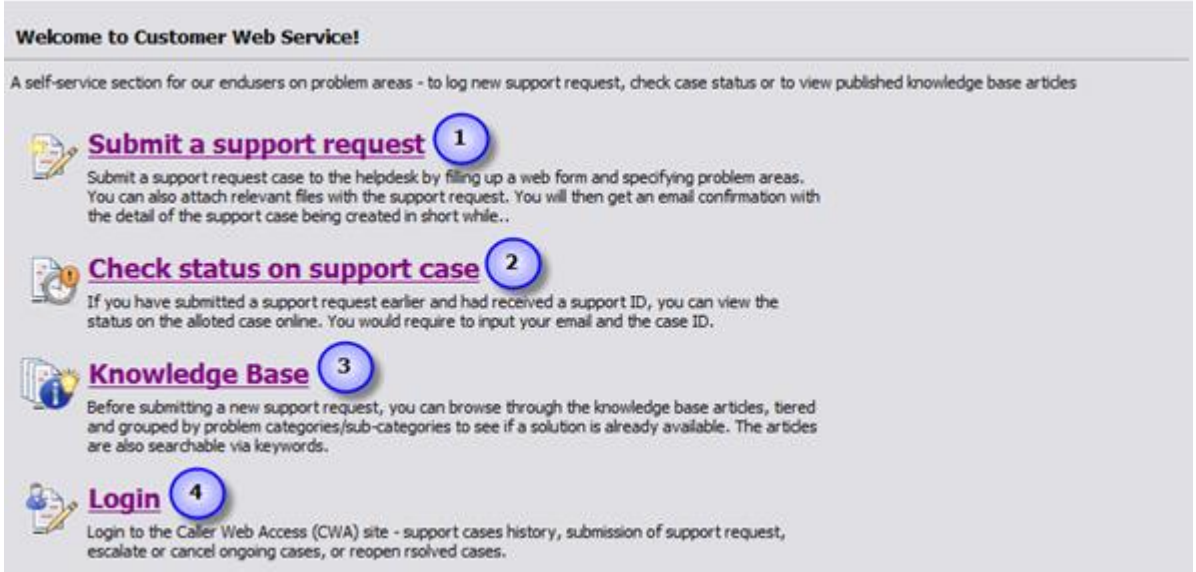
*__Caller Web Access (CWA)__ - is a part of the Customer Web Service (CWS) site, requires a user credential for caller to access their support cases online. Helpdesk managers can define this credential (e.g. password) in the Team Helpdesk Callers list dialog. Alternatively, a random password can be generated automatically when a new caller is added to the Callers list.

How does it work?

The Team Helpdesk web case submission allows for your end-users and customers to submit their service request through an intuitive, easy-to-use web form interface; needing only their favorite web browser.

The Customer Web Service (CWS) is a collection of ASP.NET webpages that cater to the helpdesk end users on the web. It consists of a structured support request submission webform, a support case status querying form, a self-service knowledge base and a special web interface exclusively for existing callers to access their support cases online. All these sections are available to any users accessing the customer service website except for the Caller Web Access (CWA) site, where only existing users are allowed to do so from the web.

Unlike other traditional web-based helpdesks, CWS site in Team Helpdesk does not require a dedicated database. Instead, the support cases submitted by customers are directly feed into the Team Helpdesk folders (i.e., stored in Exchange server) via one of the helpdesk manager add-in installed in Outlook (which can be set under *Team Helpdesk Manager > Web Access > Workload*). The helpdesk manager add-in services requests coming from CWS site and behaves like a server. That is why, we recommend that you assign the workload of processing and servicing the TWA and CWS sites to a dedicated system that is running 24x7.



1. Allows end-user to enter information on their problem on a structured web form.
2. Allows end-user to check and track the status of their support cases online.
3. Allows end-user to browse or search through the web-based knowledge base articles to find a solution on their problem.
4. Allows existing callers to access their exclusive member area online such that they can view support cases history, submit new support request directly, escalate or cancel ongoing cases or reopen existing resolved cases.

Why is Online Customer Service Important?

Web-enabled customer service provides a variety of benefits. In addition to the fact that many prospective customers will refuse to do business with an organization if they don't offer some level of online support, benefits include:

- 24/7 customer service capability
- immediate response to customer inquiries
- meeting/exceeding constantly evolving customer demands
- improved customer satisfaction and customer relationships
- cost savings
- automation of repetitive tasks makes it easy for customers to do business with you
- re-allocation of customer service staff to value-add tasks
- acquisition of invaluable customer feedback and requests

Configure Customer Web Service (CWS) on IIS

Before end-users and callers can start using Customer Web Service (CWS), the helpdesk administrator needs to first setup and configure certain settings, in the web access administrative panel in Team Helpdesk Outlook, and then on the IIS web server.

To install, setup and use Customer Web Service (CWS), the followings list the requirements on both the web server and the customer's system.

On the Web Server system

- Microsoft Internet Information Server
- Microsoft ASP.NET 2.0 Enabled
- Write permission for ASP.NET users on a temporary subfolder under CWS IIS folder
  Note: As there is no direct interfacing between the CWS site and your Exchange server, the IIS web server does not need to be on the same windows server as that of your Exchange server, but should be under the same office network.

On the Customer's system

- Any Web browser
- Internet Connection

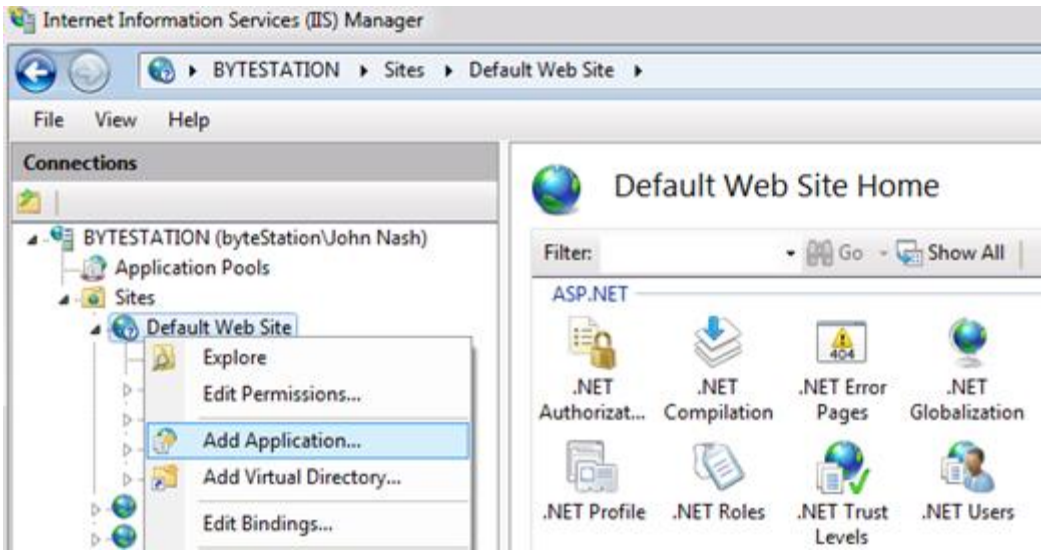
The followings list all the steps required to be performed to get CWS website running in few minutes.

Step 1: Setting up an Application under IIS
Step 2: Set appropriate network permission to the IIS shared folder
Step 3: Extract/Copy all Customer Web Access application files to the IIS web folder
Step 4: Set ASP.NET permission on Temp sub-folder
Step 5: Configure web Access specific settings in Team Helpdesk add-in
Step 6: Write/Update XML metadata files from Team Helpdesk for Outlook

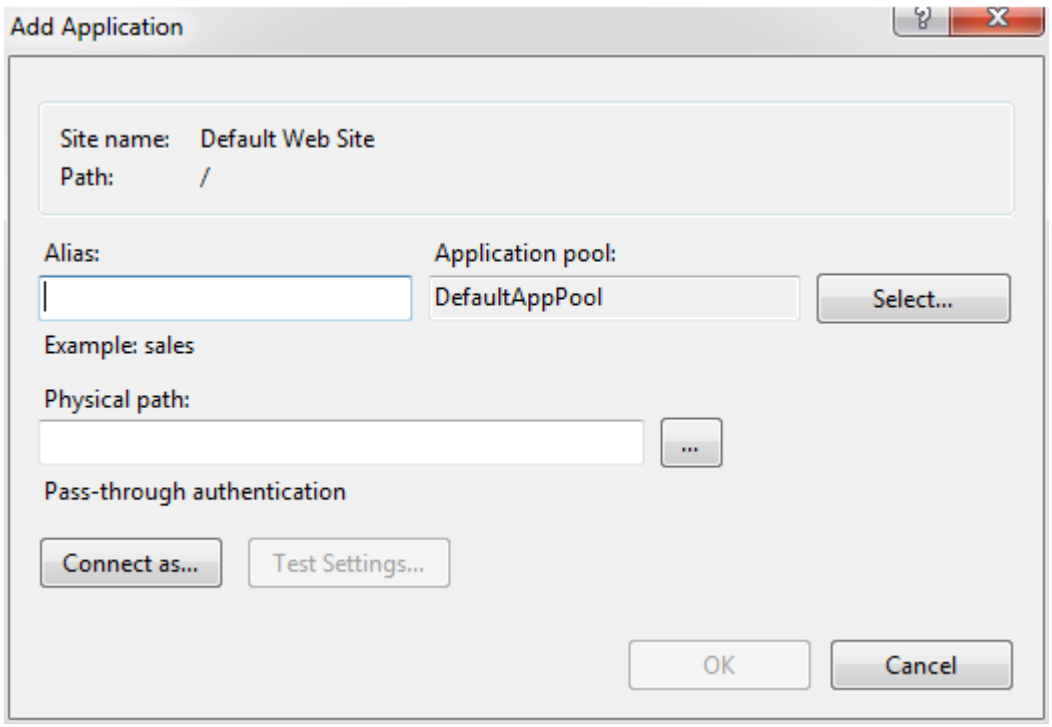
Step 1: Setting up an Application under IIS

The first step in setting up the Customer Web Service (CWS) site requires creating a new application under your IIS server. In this document, we discuss the configuration of an application on your default web site under your IIS.

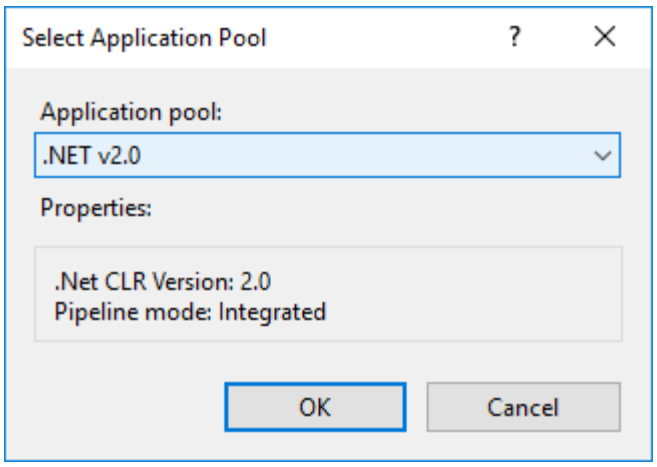
To create a new application, right-click the site and select '**Add Application…**'.



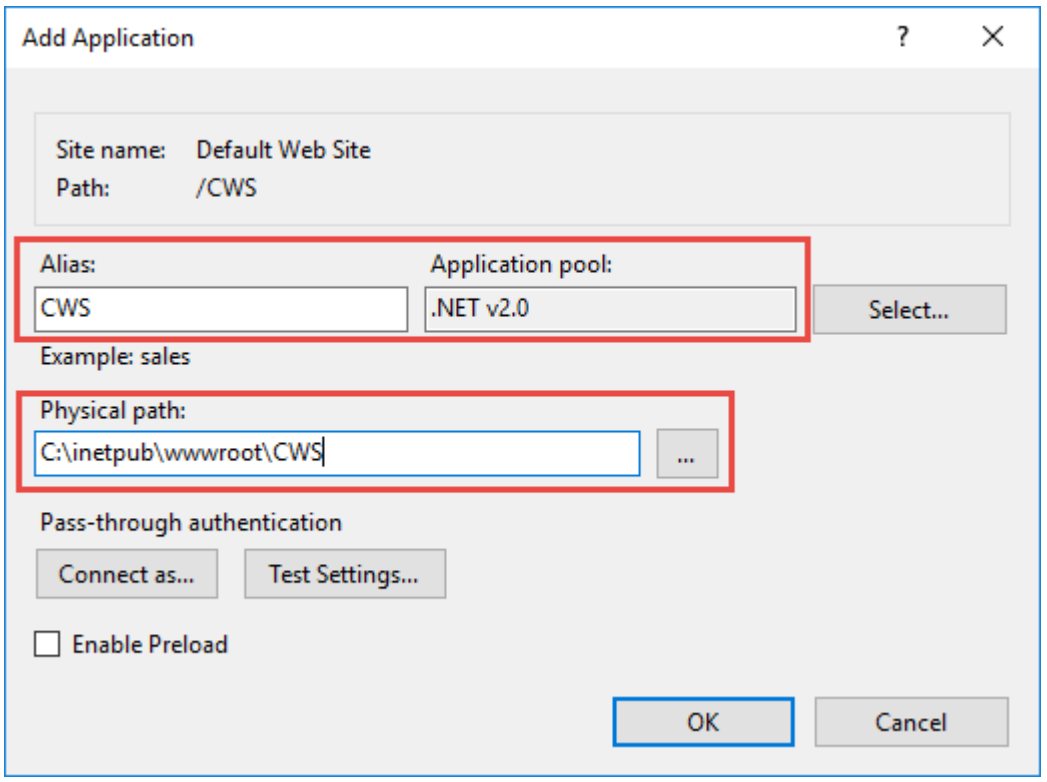
You will be prompted with the '**Add Application**' dialog box.



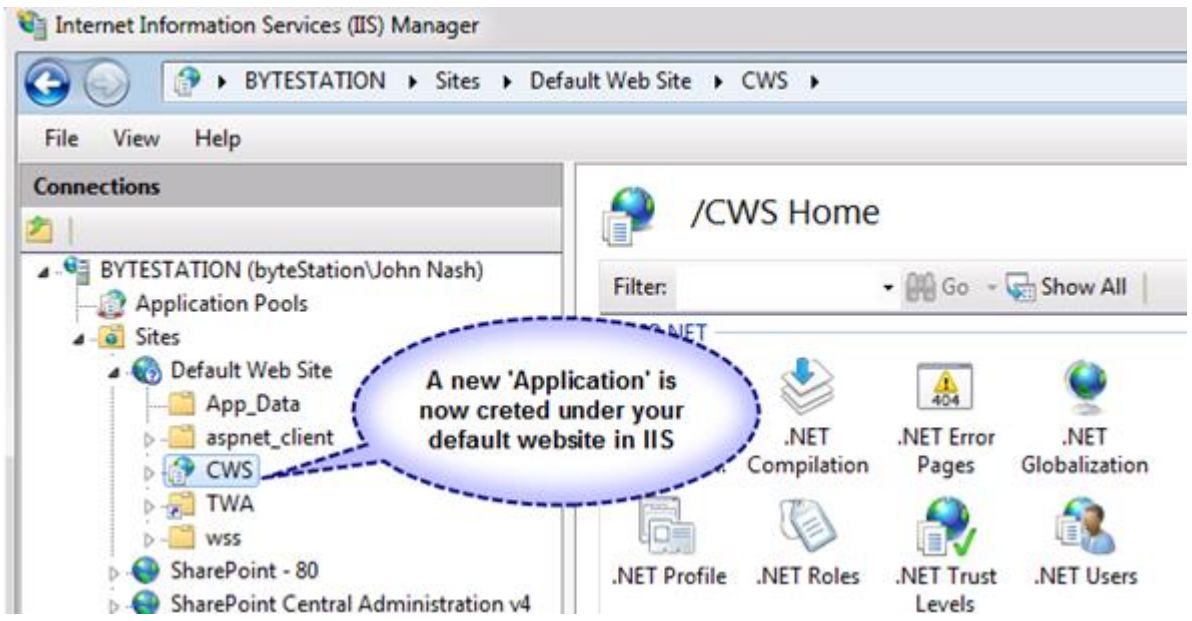
First, set the CWS application to use .NET CLR 2.0 application pool by clicking '**Select…**' button in the '**Application Pool**'.



Type the alias for the Application, say, CWS and specify the physical folder on the local server to map to this alias. In this case, the physical folder on the server is **C:\Inetpub\wwwwroot\CWS**



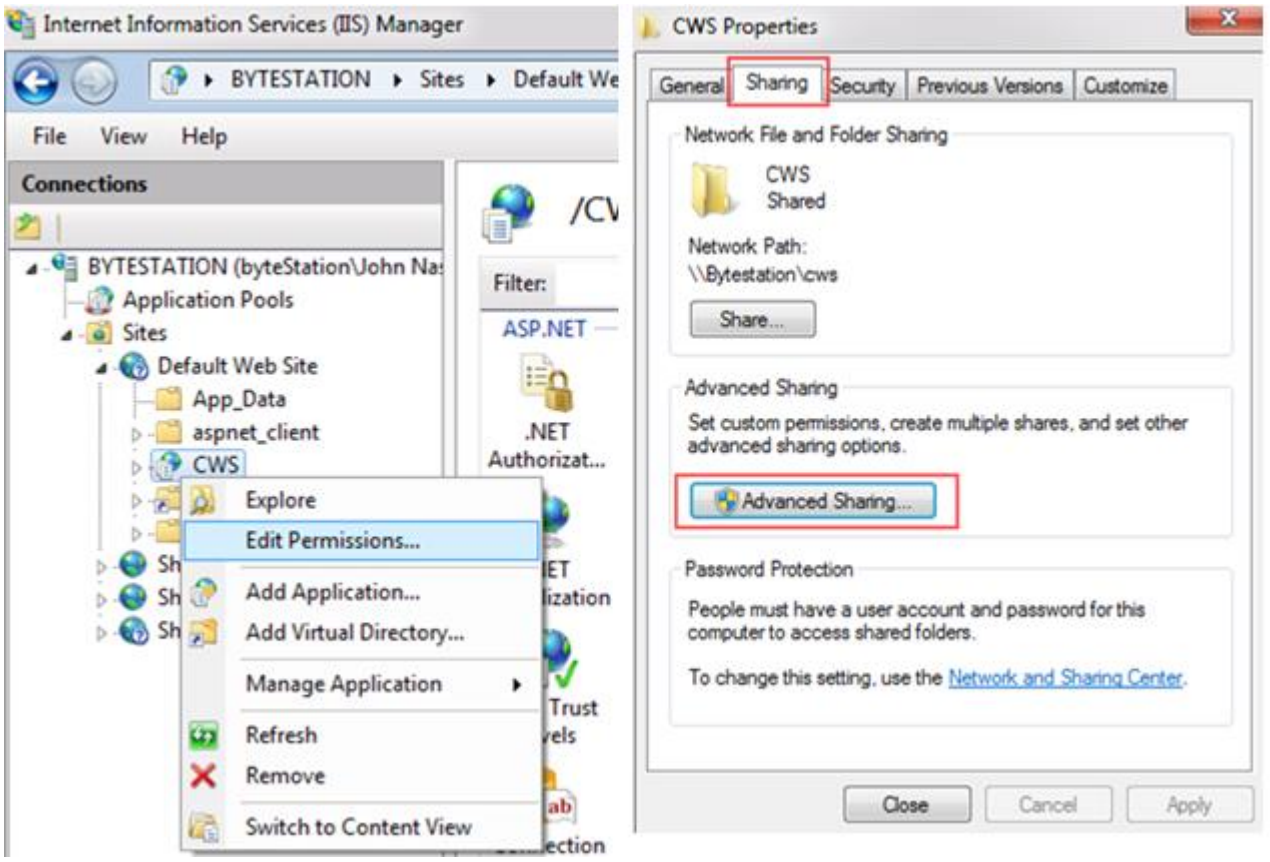
Click **OK**. The image below displays the result.



Step 2: Set appropriate network permission to the shared folder

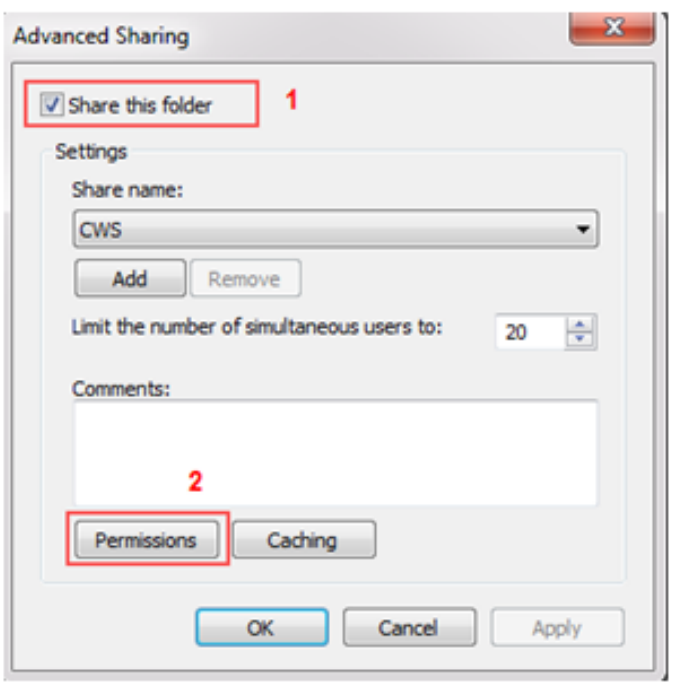
The just created 'CWS' IIS Application now needs to be set as a shared network folder for all the helpdesk technicians that uses Team Helpdesk for Outlook. Data interchange between the customer web access and the Team Helpdesk add-in in Outlook uses XML formats and are written to a temporary subfolder 'Temp' under the application folder. Due to this requirement, all helpdesk technicians working in Outlook will need to have full control over the 'CWS' network folder.

Right-click the CWS application from the tree view and click '**Edit Permissions…**'

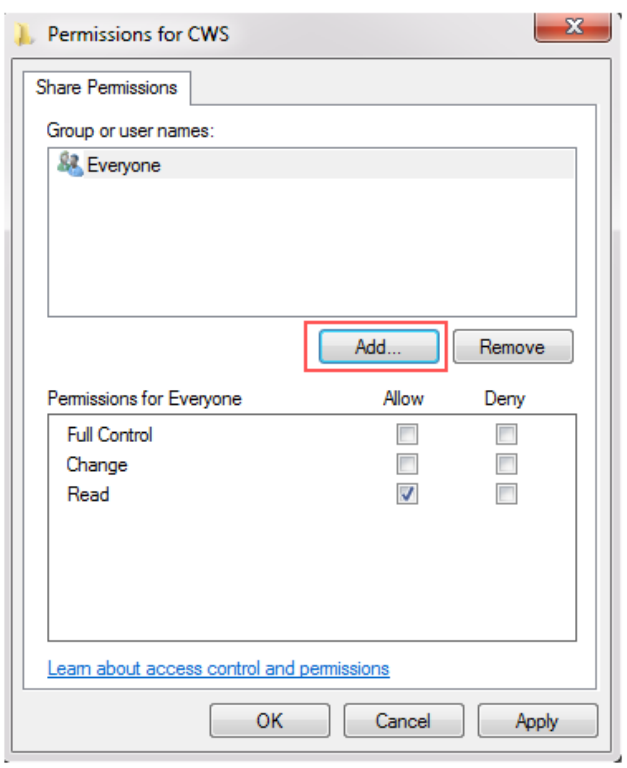


We need to grant full control to this folder (e.g. *C:\Inetpub\wwwroot\CWS*) in both Sharing and Security tabs. Let us start with the first one. Click the **Sharing tab > Advanced Sharing…**

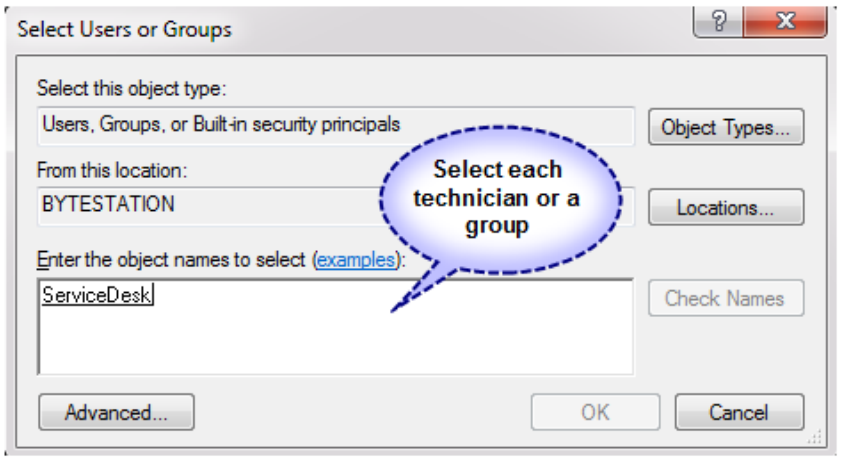
From the '**Advanced Sharing**' box, enable the option '**Share this folder**'.



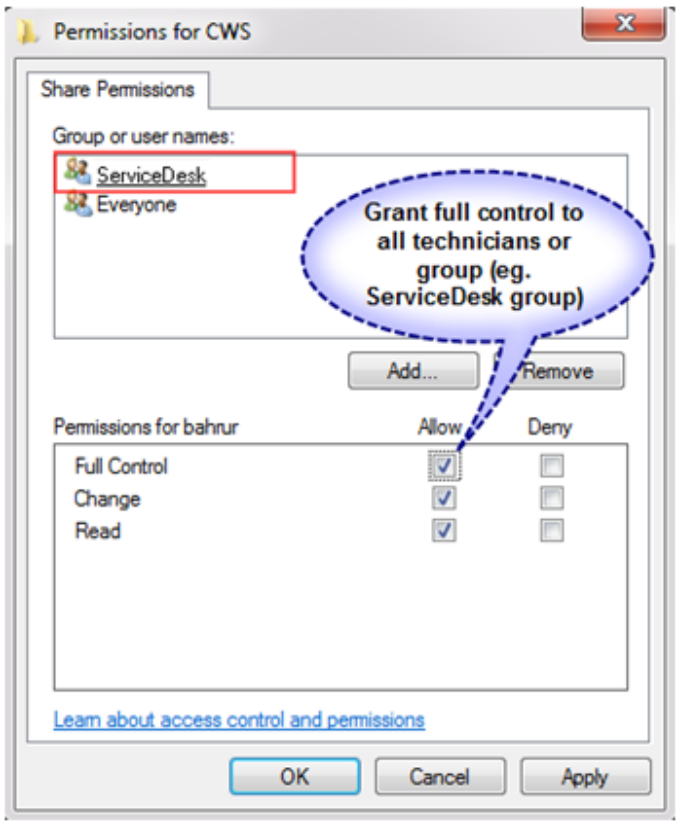
And then click '**Permissions**'.



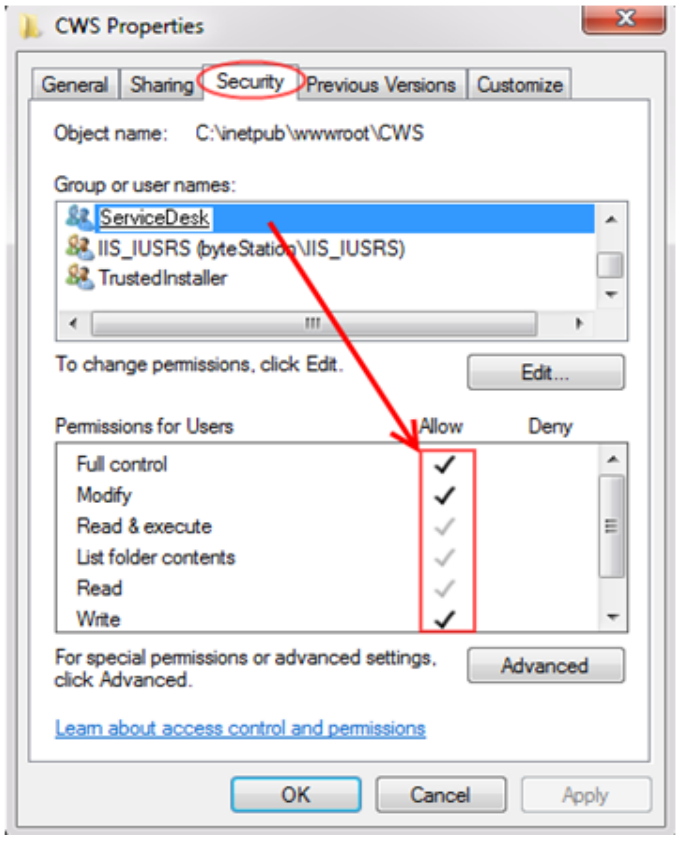
Once you are in the permissions dialog, you will see that by default, any users on the local network have read permission over the shared folder. For our needs, we need to allow all helpdesk users to save/update files under this folder. So, either you can add individual user or a group (if you have it defined).



In our example, we have defined a group *'ServiceDesk'* comprising of all helpdesk users so that setting permission for all users can be done in a single click. Check the option **'Full Control'** to allow all technicians in the helpdesk team to save/update 'Customer Web Service' specific metadata XML files.



Likewise, add the same helpdesk group (e.g. *ServiceDesk*) under the Security tab and grant **'Full Control'** access.



Step 3: Extract all Customer Web Service (CWS) application files

Now that we have created an exclusive web-enabled physical folder on the server and granted full control to all helpdesk users (step 1 and 2 respectively), the next step is to extract all the files and subfolders from the Customer Web Service zip archive (e.g. CWS.zip) to the shared network IIS folder.

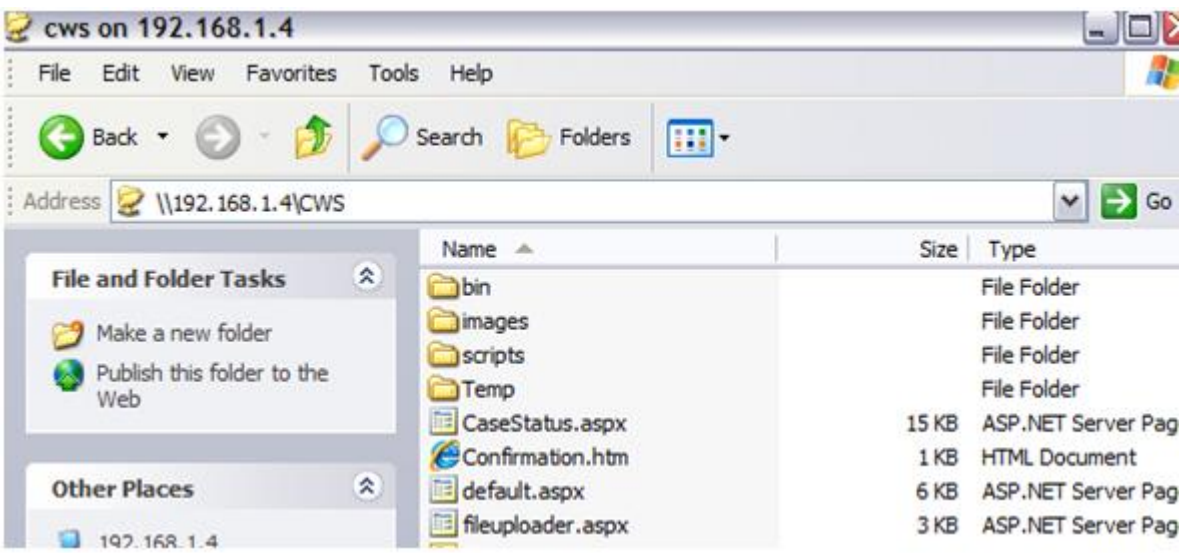
This CWS.zip is installed with Team Helpdesk Manager, and is located under the following folder in your system:

C:\Users\USERNAME\AppData\Roaming\AssistMyTeam\Team Helpdesk Resources

The contents of 'CWS.zip' are shown below:

Name	Type
Temp	File Folder
scripts	File Folder
images	File Folder
bin	File Folder
showKB.aspx	ASP.NET Server Page
fileuploader.aspx	ASP.NET Server Page
loadmyemail.aspx	ASP.NET Server Page
default.aspx	ASP.NET Server Page
KB.aspx	ASP.NET Server Page
MyCases.aspx	ASP.NET Server Page
CaseStatus.aspx	ASP.NET Server Page
newCase.aspx	ASP.NET Server Page
SupportRequest.aspx	ASP.NET Server Page
login.aspx	ASP.NET Server Page
loadmycase.aspx	ASP.NET Server Page
footerMyArea.ascx	ASP.NET User Control
timeout.ascx	ASP.NET User Control
headerMyArea.ascx	ASP.NET User Control
header.ascx	ASP.NET User Control
Confirmation.htm	HTML Document
uploader.js	JScript Script File
PrecompiledApp.config	XML Configuration File
web.config	XML Configuration File

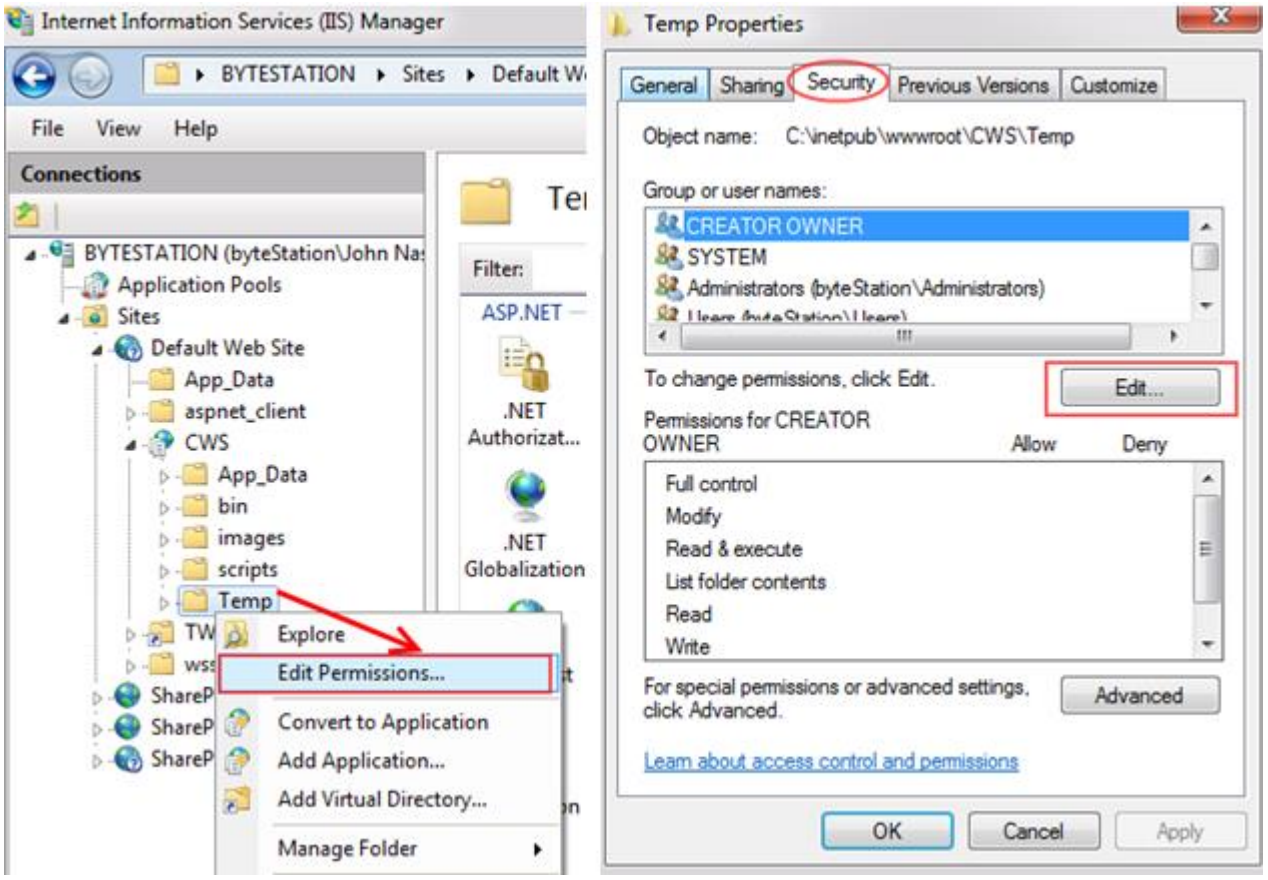
Extract all the files and subfolders under the zip (e.g. *CustomerWebService.zip*) file to the network shared web-enabled Customer Web Service (CWS) folder. For example, \\192.168.1.4\CWS where '192.168.1.4' is the windows server and 'CWS' being the web-enabled folder (either configured as a website or virtual directory under an existing website in IIS). If step 2, if the permission (e.g. full control) was successfully set, the files and subfolder would be extracted/copied to the network share.



Step 4: Set ASP.NET (Internet Guest Account) permission on Temp folder.

The Customer Web Service functionality is built upon ASP.NET 2.0 and AJAX technology. Typically, an ASP.NET application requires read, execute, and list access for the ASP.NET account (also known as Internet Guest Account) for the web site root (for example: D:\inetpub\wwwroot\CWS or any alternative site directory you may have configured in IIS), the content directory and the application root directory in order to monitor for configuration file changes. The application root corresponds to the folder path associated with the application virtual directory in the IIS Administration tool.

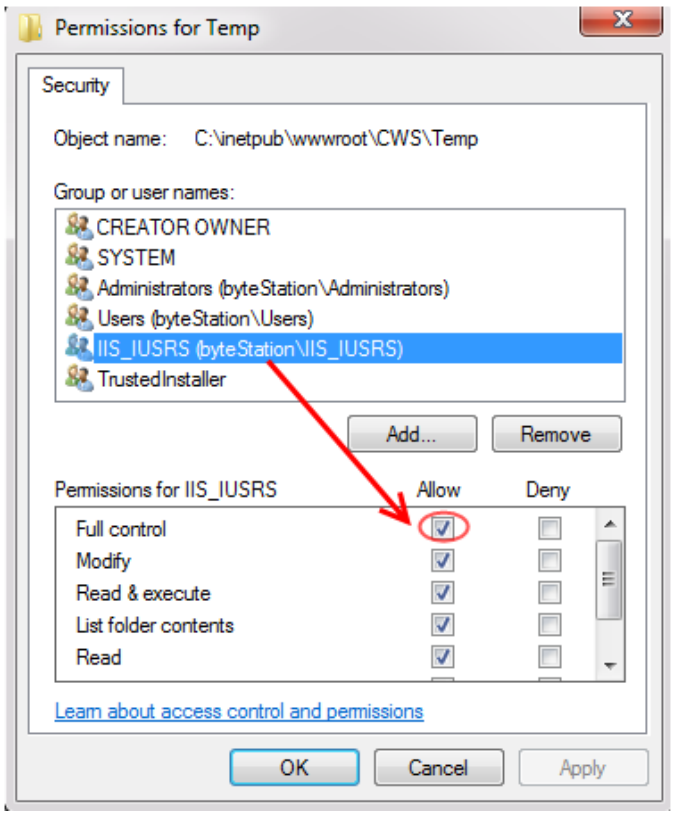
Under your IIS server, you have multiple subfolders under the CWS application. The special interest that we have now is for the **'Temp'** folder, as this is the folder that saves uploaded attachments from support request case temporarily. Hence, the ASP.NET account needs to be configured to have '**Full Control**' over this 'Temp' folder. You do that by right-clicking 'Temp' folder > '**Edit Permission…**'.



From the Temp properties dialog box, click the **'Security'** tab, and click the '**Edit…**' button to invoke the '**Permissions**' tab.

In the 'Permissions' dialog box, select the ASP.NET (Internet Guest) account. Different version of IIS has different ASP.NET account name. For example, in IIS version 5 (windows 2000 server), it is ASPNET, and in IIS version 6 (windows server 2003), it is IIS_WPG group whereas in IIS 7 and above version (Windows 7 and above), it is IIS_IUSRS group.

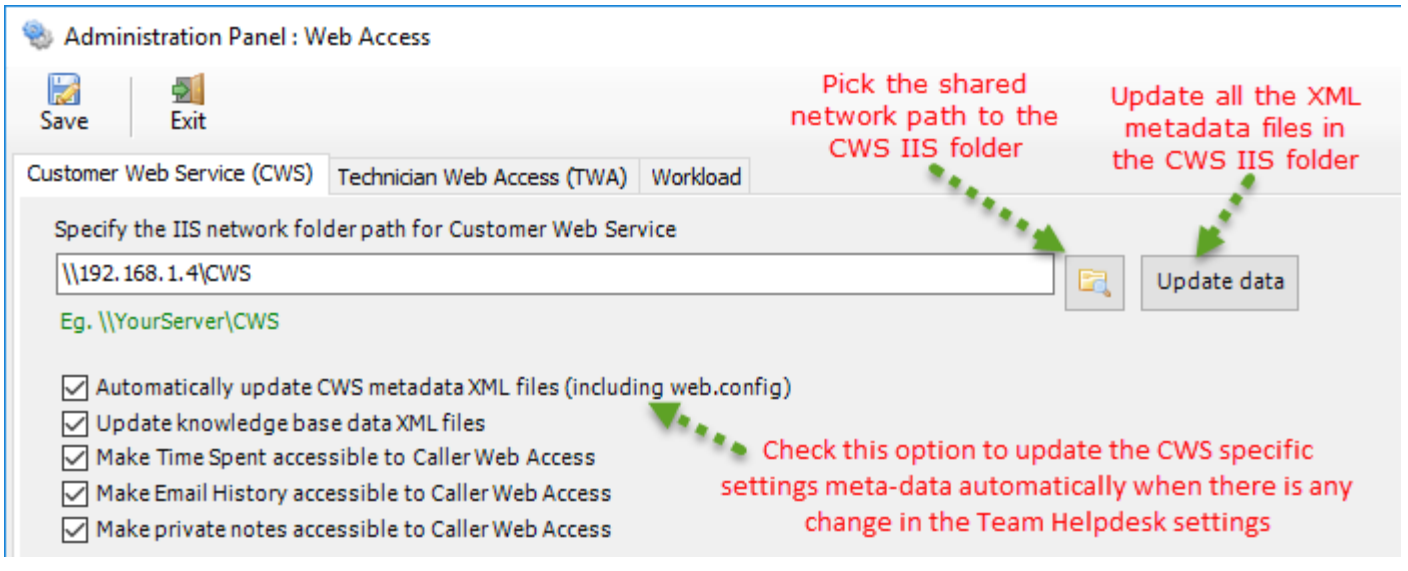
In the screenshot below, we have IIS 7 version and hence, the **IIS_IUSR** group is allowed **'Full Control'** over the **'Temp'** folder.



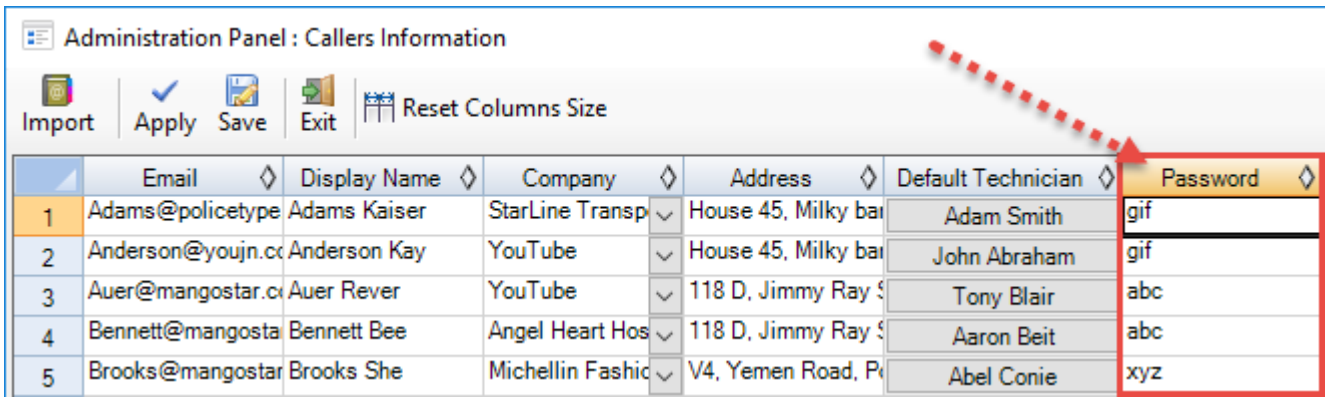
Step 5: Configure CWS specific settings from Outlook

The Customer Web Service (CWS) site does not make use of a database to store the helpdesk settings and lists. Instead, the data and settings are stored as XML metadata files and are saved/updated from the Team Helpdesk add-in interface in Outlook (by helpdesk managers/technicians). The document takes you to finer detail on various web access settings that need to be configured in the administrative tool, before saving/updating the XML metadata files in the IIS folder.

Displayed below is a part of the Customer Web Service (CWS) settings dialog. To save/update the CWS specific XML metadata files from Outlook to the shared network web-enabled folder (on the server), it needs to know the full UNC folder path. If the network folder resource requires a network credential, then you will be prompted to enter one



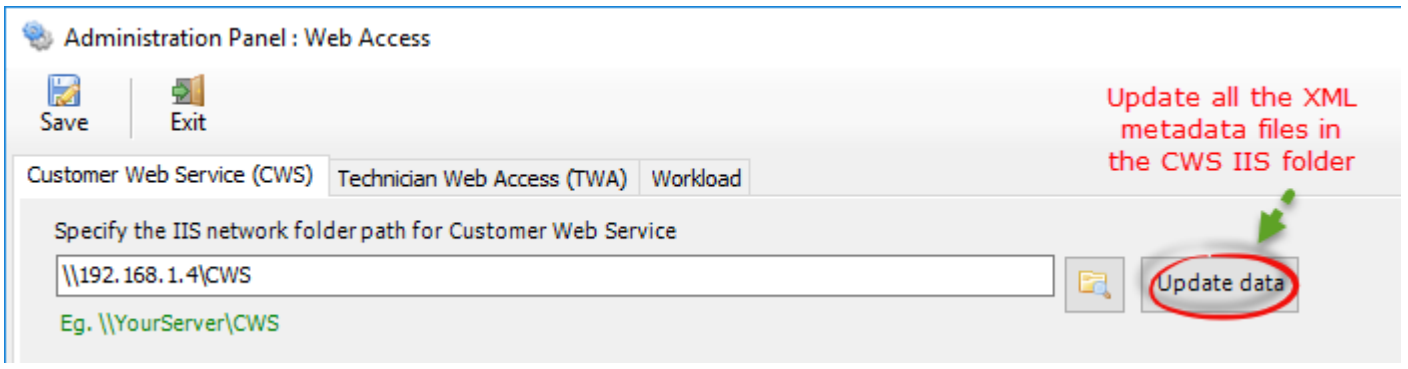
The Caller Web Access (CWA) site, which is a part of the Customer Web Service (CWS) site, requires a user credential for caller to access their support cases online. Helpdesk managers can define this credential (e.g. *password*) in the Team Helpdesk Callers list dialog. Alternatively, a random password can be generated automatically when a new caller is added to the Callers list.

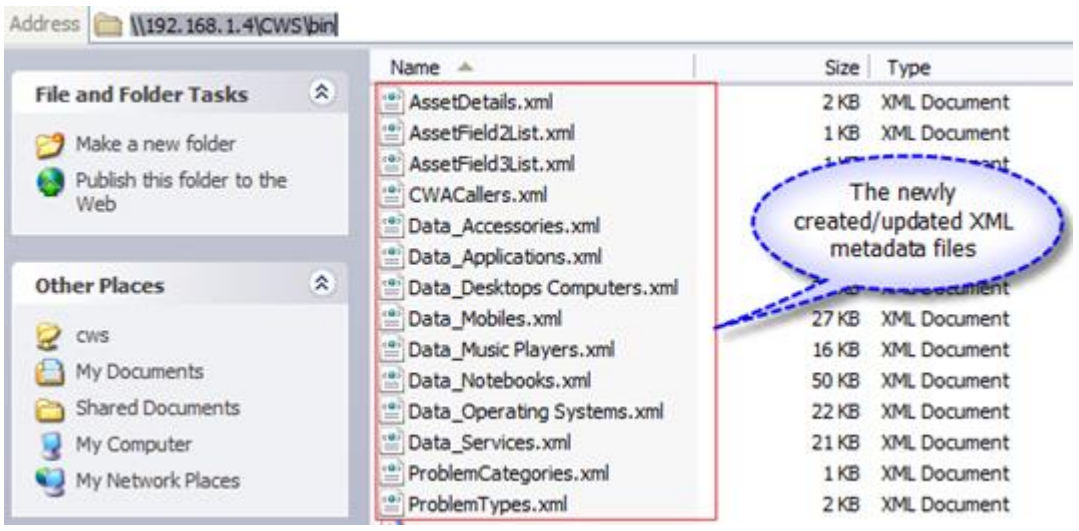


Step 6: Write/Update XML metadata files from Outlook

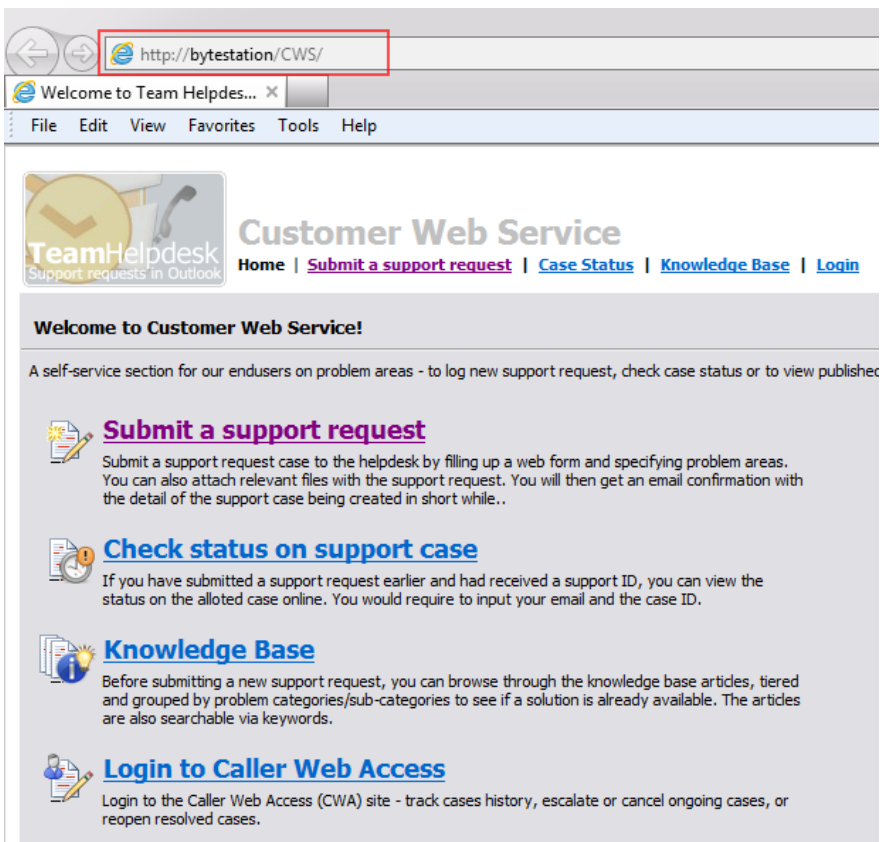
The last remaining step is to save/update the Customer Web Service (CWS) specific XML metadata files in the CWS network web-folder. The XML metadata files contain the required Team Helpdesk lists and settings defined by the helpdesk manager in Outlook and these files feed data to the Customer Web Service applications when end-users submit new support requests via web-form or when caller login to load their support cases.

Before any XML data files can be updated, the helpdesk manager needs to specify the network share that was configured in Step 2. If the appropriate permission was set, clicking the **'Update data'** button generate all the required XML files.



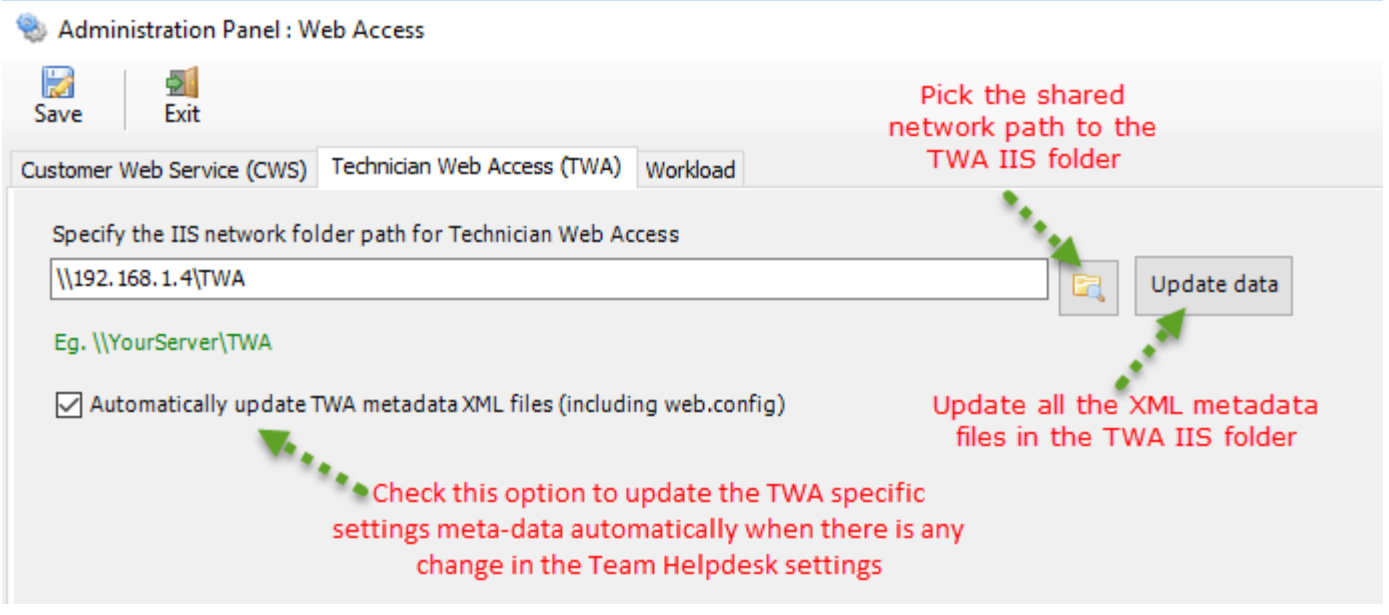


Now, open your web browser and point to the CWS URL. Usually the URL is in the format **http://SERVER/CWS/.** For example, in our instance, it would be http://byteStation/CWS/



Technicians Web Access (TWA)

The Technician Web Access (or **TWA** which we will refer to often) is an AJAX enabled ASP.NET 2.0 website. It provides a rich set of tools and interactivity with the live helpdesk data stored in the exchange folder. Technicians can create new case, work on existing case and close, re-open or delete case directly from within the web access form.



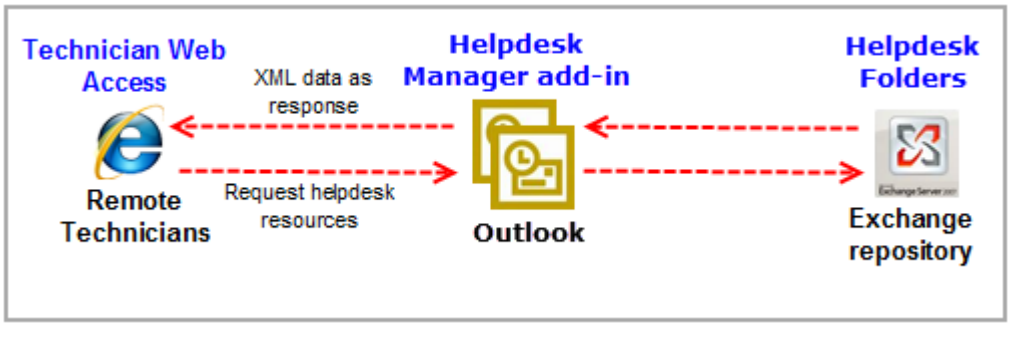
1. Here, you need to specify the shared network path of the TWA folder (which is located in your IIS **C:\inetpub\wwwroot** parent folder on your windows server). To save/update the TWA specific XML metadata files from Outlook to the shared network web-enabled folder (on the server), it needs to know the full UNC folder path. If the network folder resource requires a network credential, then you will be prompted to enter one.
   NOTE: You need to share this TWA folder such that all technicians can have access to it from their respective systems within the office network.

2. **Automatically update TWA metadata XML files (including web.config)**
   Enable this option to allow helpdesk add-in to update the TWA specific settings metadata automatically when there is any change in the Team Helpdesk settings. The Team Helpdesk lists and settings (e.g. problem categories and types) would surely change/update in due time. The helpdesk manager would need to update the web service XML metadata files accordingly, so that data used in the web service application is in synch with that in Outlook. Though the helpdesk manager can manually update the data files for web service, it would be a tedious task if the settings in Outlook are to change every now and then. In such scenario, it is recommended to allow helpdesk add-in to automatically update TWA specific metadata XML files in the shared network folder, when there are any changes in the lists and settings in Outlook.

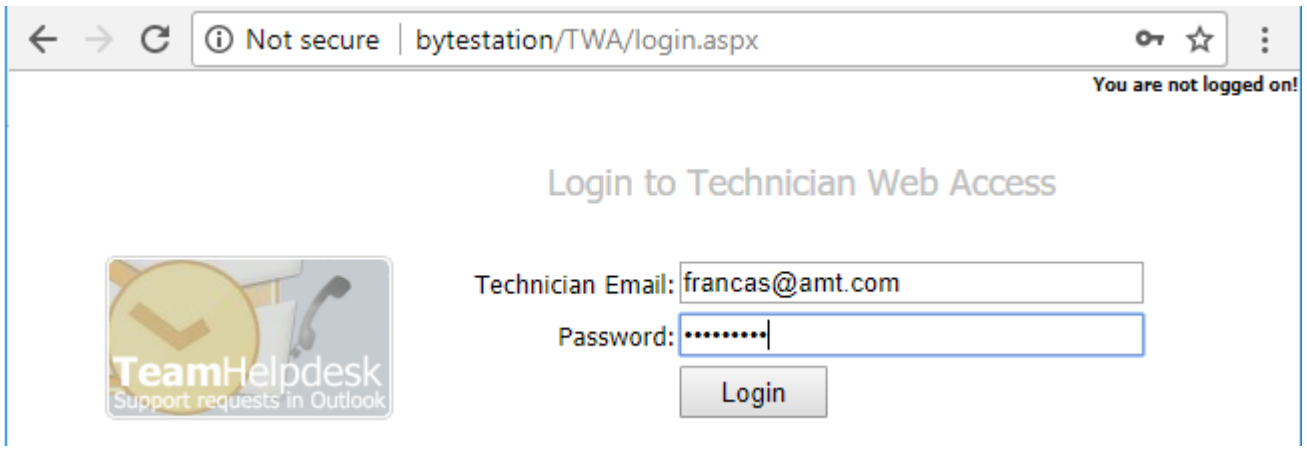
How It works?

The Technician Web Access (TWA) site is an AJAX enabled ASP.NET 2.0 application and provides a rich set of tools and interactivity with the live data in the exchange folder. Unlike other traditional web-based helpdesks, TWA site in Team Helpdesk does not require a dedicated database. Instead, the support cases data are sourced from your Exchange server via one of the helpdesk manager add-in installed in Outlook (which can be set under *Team Helpdesk Manager > Web Access > Workload*). The helpdesk manager add-in services requests coming from TWA site and behaves like a server. That is why, we recommend that you assign the workload of processing and servicing the TWA and CWS sites to a dedicated system that is running 24x7.

The idea behind the TWA is not to substitute the Team Helpdesk add-in functionality, rather it is to complement the support of a web interface from where remote technicians that do not have access to the MS Exchange resource, can easily work on support cases, thereby not handicapping the helpdesk operation, when some technicians are offsite.



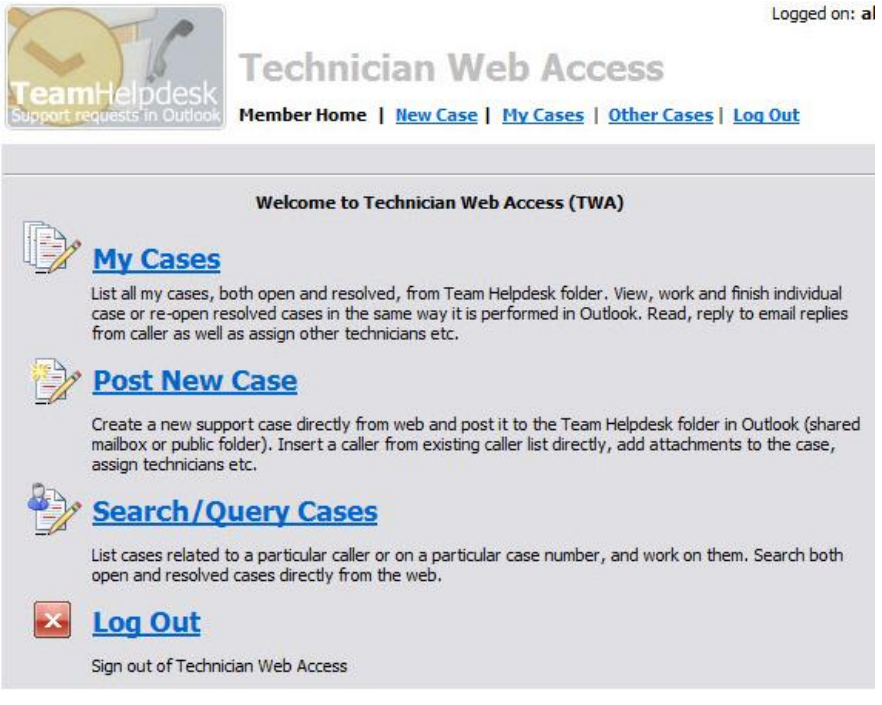
Technicians with valid web access rights will be prompted to enter user credential when logging in to the TWA website. The password required here is defined by the helpdesk managers for each technician in the Team Helpdesk technician list. Apart from the password, helpdesk managers also can also specify if a particular technician can login to the TWA, by toggling the 'admin access' switch for each technician.



Once logged in, the technician will be taken to the 'Member' section where he/she can decide what to perform in the TWA web interface.

That is, either, each technician can choose to access only their cases, or load other cases based on criteria such as case ID, technician name, caller etc.

Technician can also choose to create a new support request case that will be submitted to Team Helpdesk add-in on Outlook for further processing and storing the support case in the exchange folders.



Configure Technician Web Access (TWA) site in IIS

Before remote technicians can start using Technician Web Access (TWA), the helpdesk administrator needs to first setup and configure certain settings, in the web access administrative panel in Team Helpdesk Outlook, and then on the IIS web server.

To install, setup and use Technician Web Access (TWA), the followings list the requirements on both the web server and the client system.

On the Web Server system

- Microsoft Internet Information Server
- Microsoft ASP.NET 2.0 Enabled
- Write permission for ASP.NET users on a temporary subfolder under TWA IIS folder
  Note: As there is no direct interfacing between the TWA site and your Exchange server, the IIS web server does not need to be on the same windows server as that of your Exchange server, but should be under the same office network.

On the Customer's system

- Any Web browser
- Internet Connection

The followings list all the steps required to be performed to get TWA website running in few minutes.

Step 1: Setting up an Application under IIS

Step 2: Set appropriate network permission to the IIS shared folder

Step 3: Extract/Copy all files of Technician Web Access to the IIS web folder

Step 4: Set ASP.NET permission on Temp sub-folder

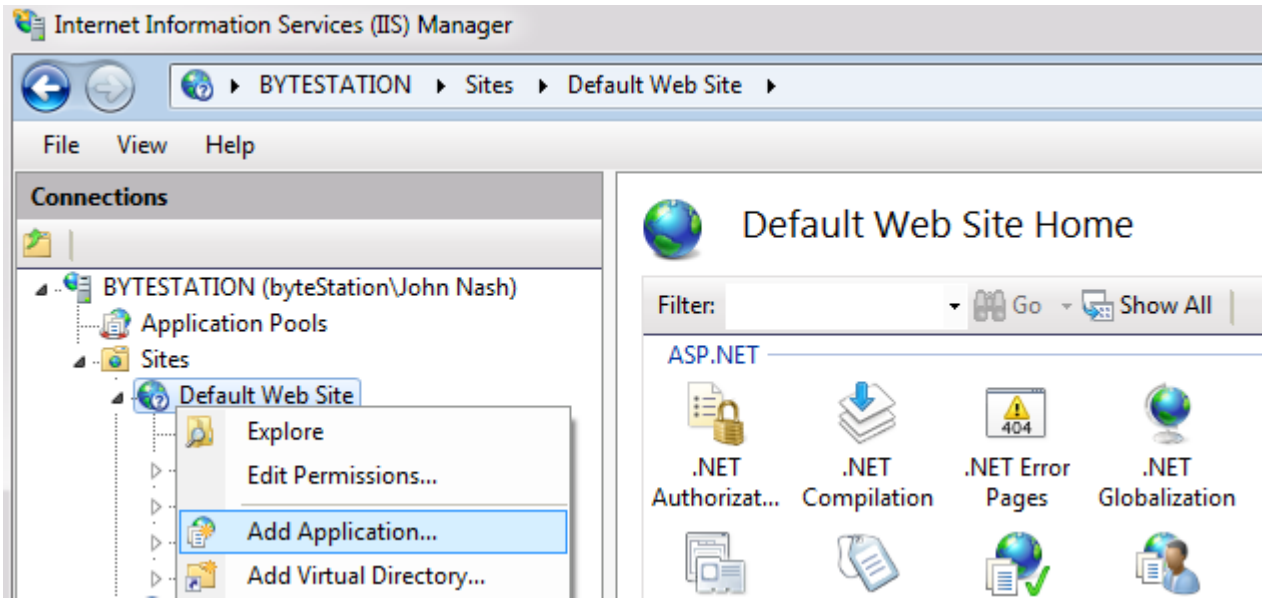
Step 5: Configure web Access specific settings in Team Helpdesk add-in

Step 6: Write/Update XML metadata files from Team Helpdesk for Outlook

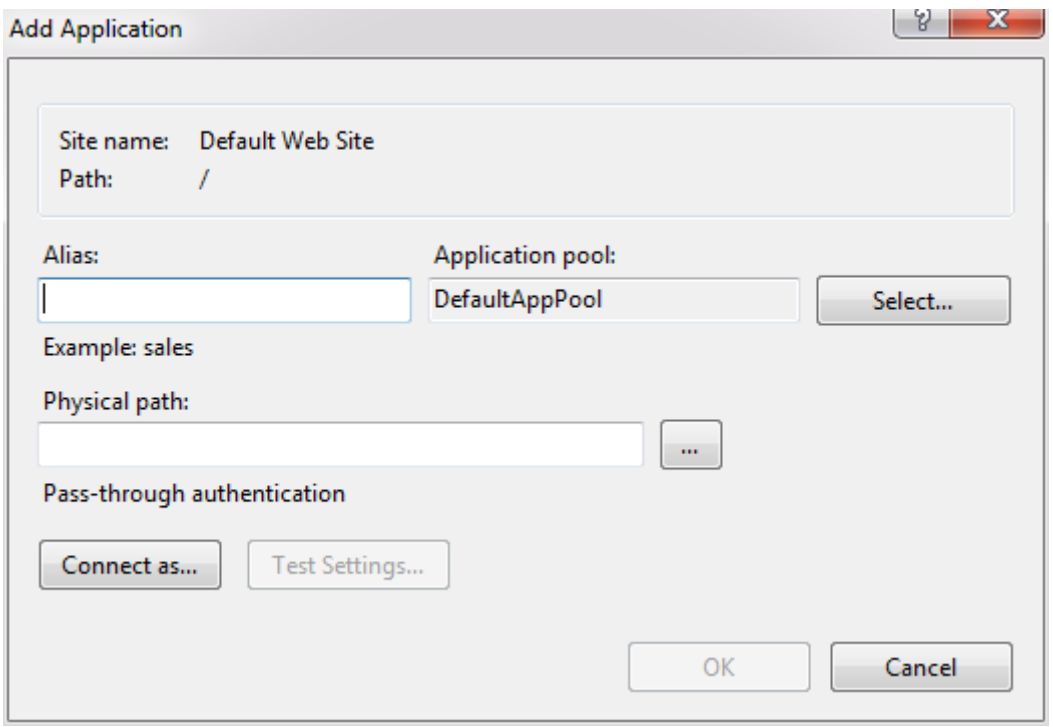
Step 1: Setting up an Application under IIS

The first step in setting up the Technician Web Access (TWA) site requires creating a new application under your IIS server. In this document, we discuss the configuration of an application on your default web site under your IIS.

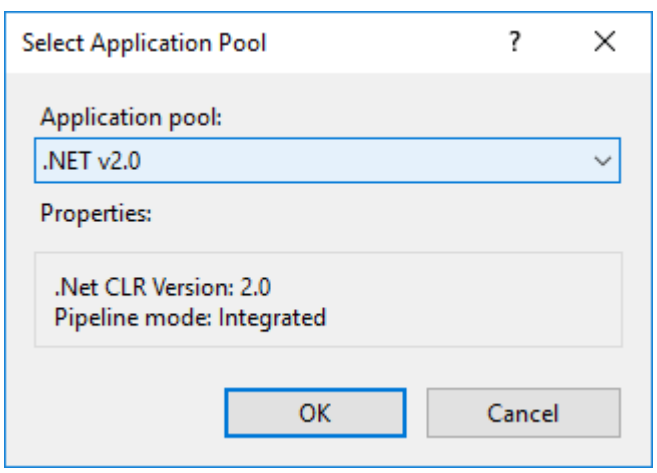
To create a new application, right-click the site and select '**Add Application…**'.



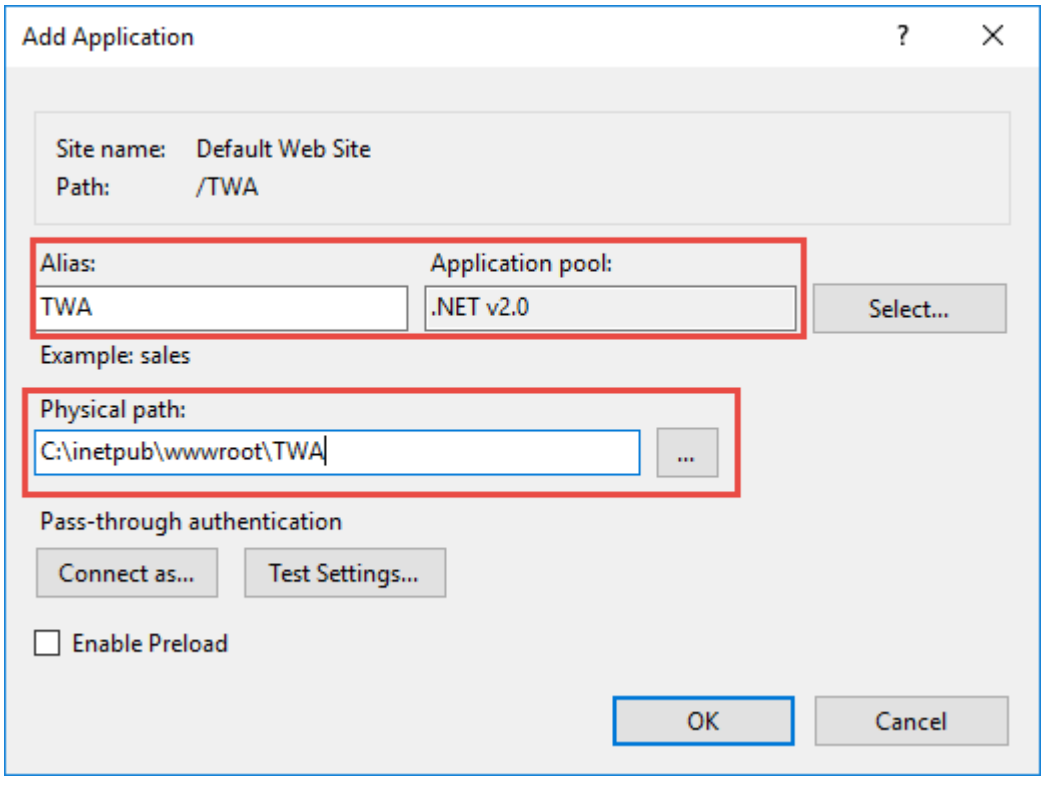
You will be prompted with the '**Add Application**' dialog box.



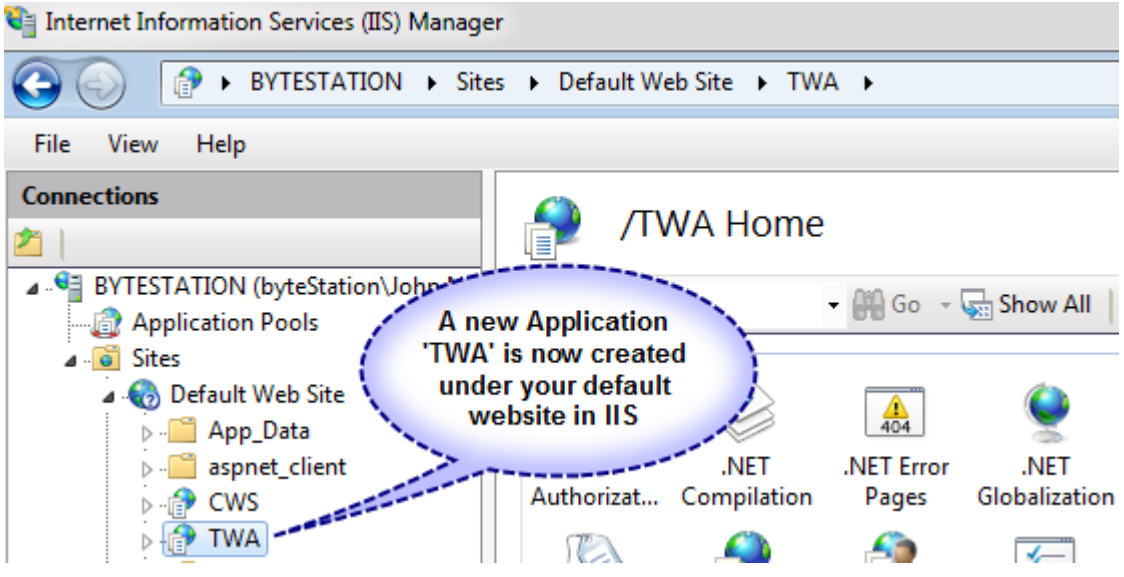
First, set the TWA application to use .NET CLR 2.0 application pool by clicking '**Select…**' button in the '**Application Pool**'.



Type the alias for the Application, say, TWA and specify the physical folder on the local server to map to this alias. In this case, the physical folder on the server is *C:\Inetpub\wwwwroot\TWA.*



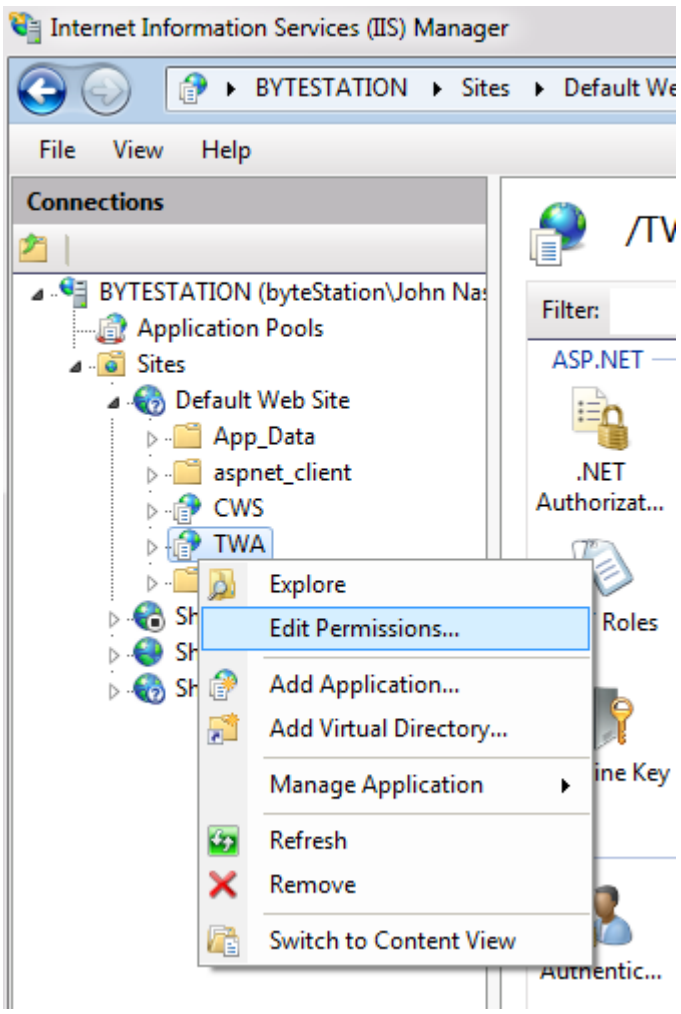
Click **OK**. The image below displays the result.

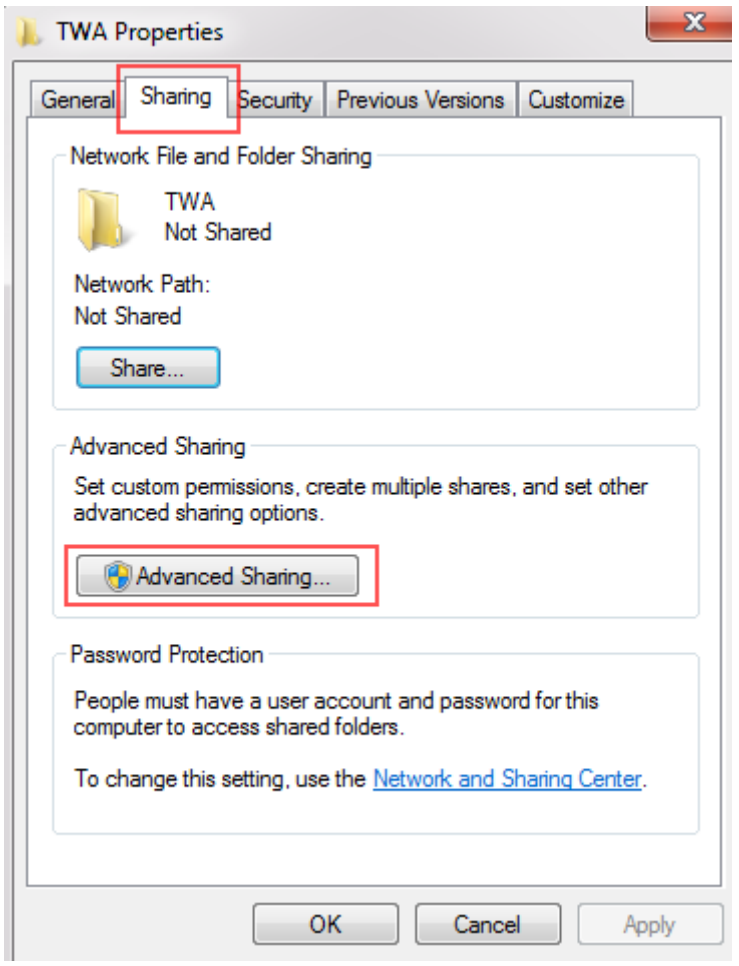


Step 2: Set appropriate network permission to the shared folder

The just created 'TWA' IIS Application now needs to be set as a shared network folder for all the helpdesk technicians that uses Team Helpdesk for Outlook. Data interchange between the Technician web access (TWA) and the Team Helpdesk add-in in Outlook uses XML formats and are written to a temporary subfolder 'Temp' under the application folder. Due to this requirement, all helpdesk technicians working in Outlook will need to have full control over the 'TWA' network folder.

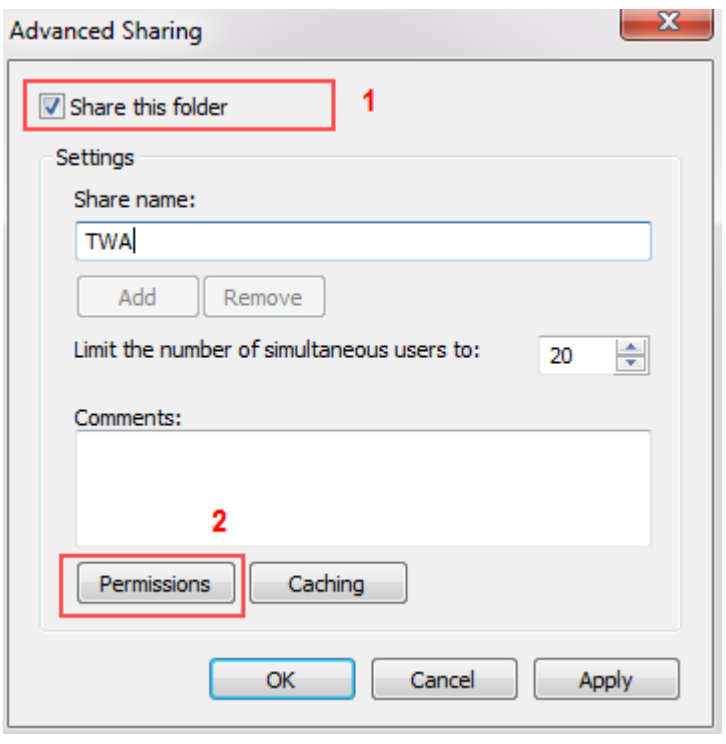
Right-click the TWA application from the tree view and click '**Edit Permissions…**'





We need to grant full control to this folder (e.g. *C:\Inetpub\wwwroot\TWA*) in both Sharing and Security tabs. Let us start with the first one. Click the **Sharing tab > Advanced Sharing…**

From the '**Advanced Sharing**' box, enable the option '**Share this folder**'. And then click '**Permissions**'.



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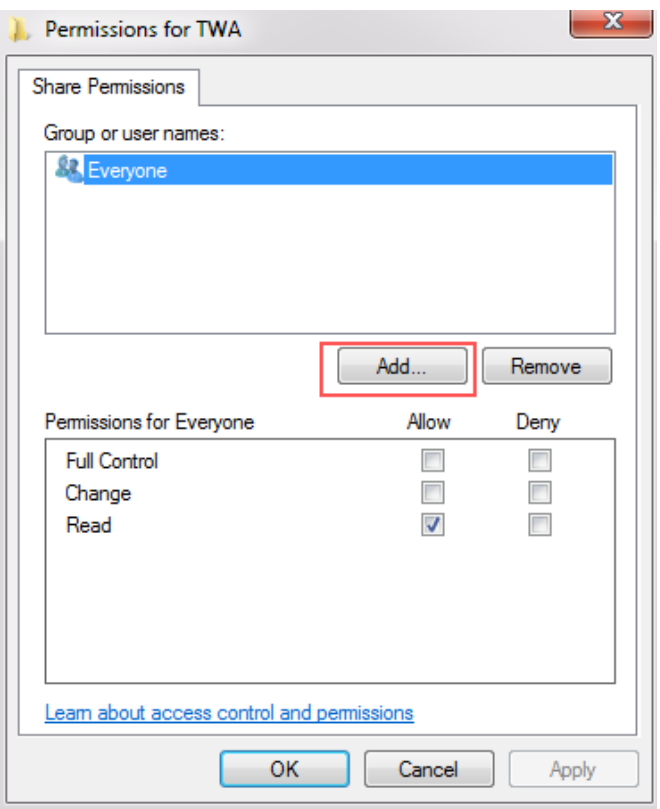
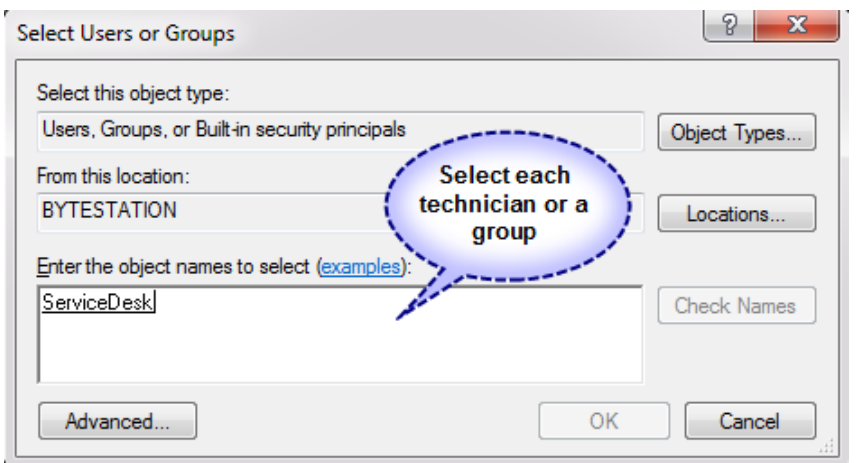
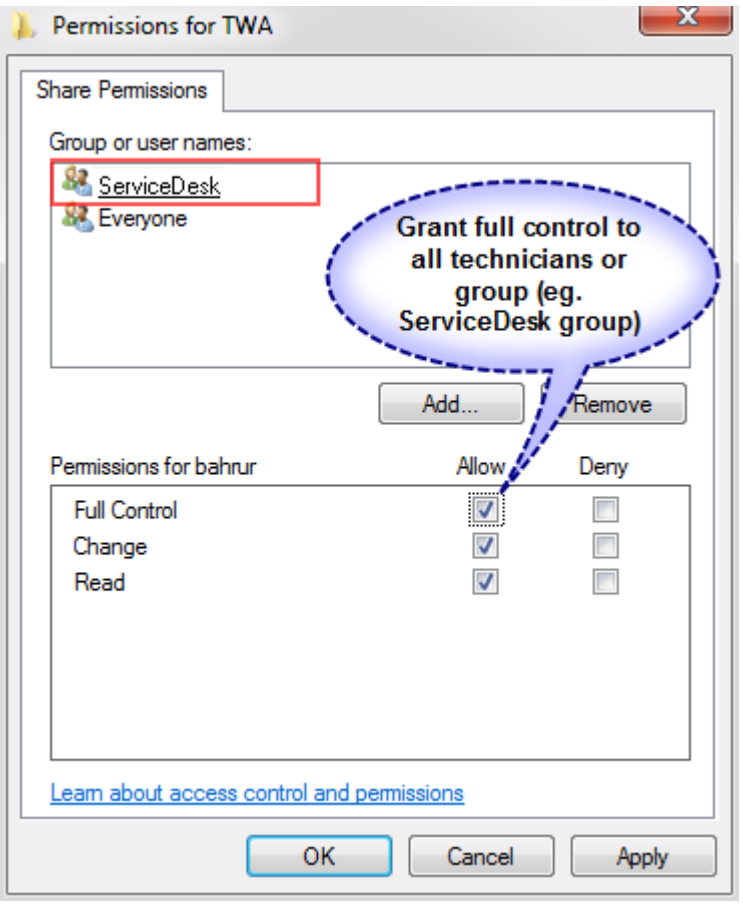
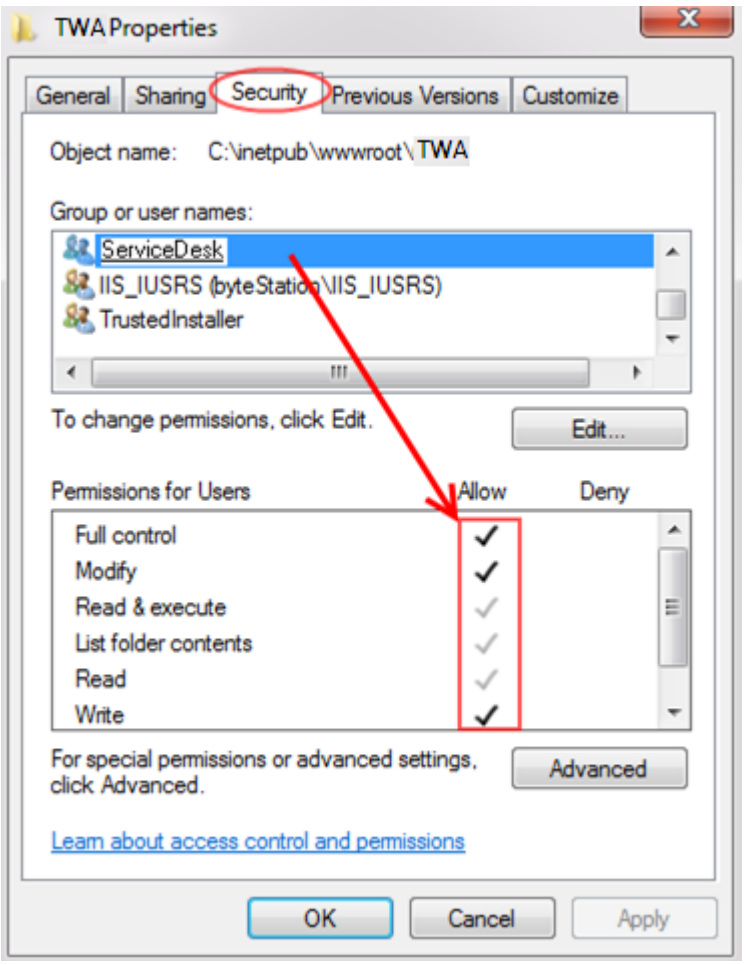




In our example, we have defined a group *'ServiceDesk'* comprising of all helpdesk users so that setting permission for all users can be done in a single click. Check the option **'Full Control'** to allow all technicians in the helpdesk team to save/update 'Technician Web Access' specific metadata XML files.



Likewise, add the same helpdesk group (e.g. *ServiceDesk*) under the Security tab and grant 'Full Control' access.



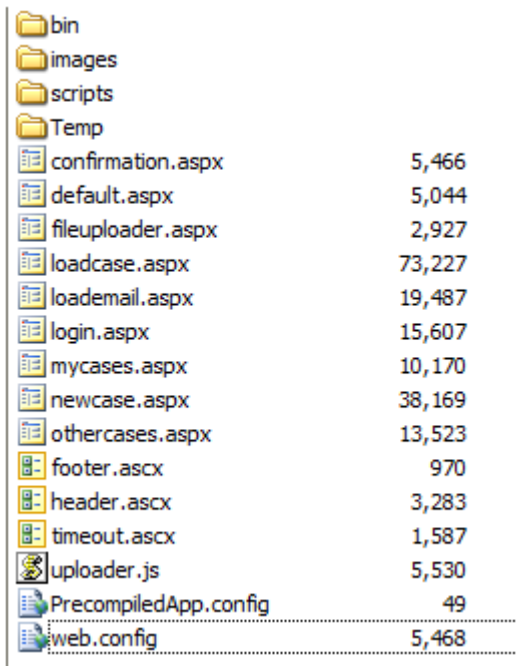
Step 3: Extract all Technician Web Access (TWA) application files

Now that we have created an exclusive web-enabled physical folder on the server and granted full control to all helpdesk users (step 1 and 2 respectively), the next step is to extract all the files and subfolders from the Technician Web Access zip archive (e.g. TWA.zip) to the shared network IIS folder.

This TWA.zip is installed with Team Helpdesk Manager, and is located under the following folder in your system:

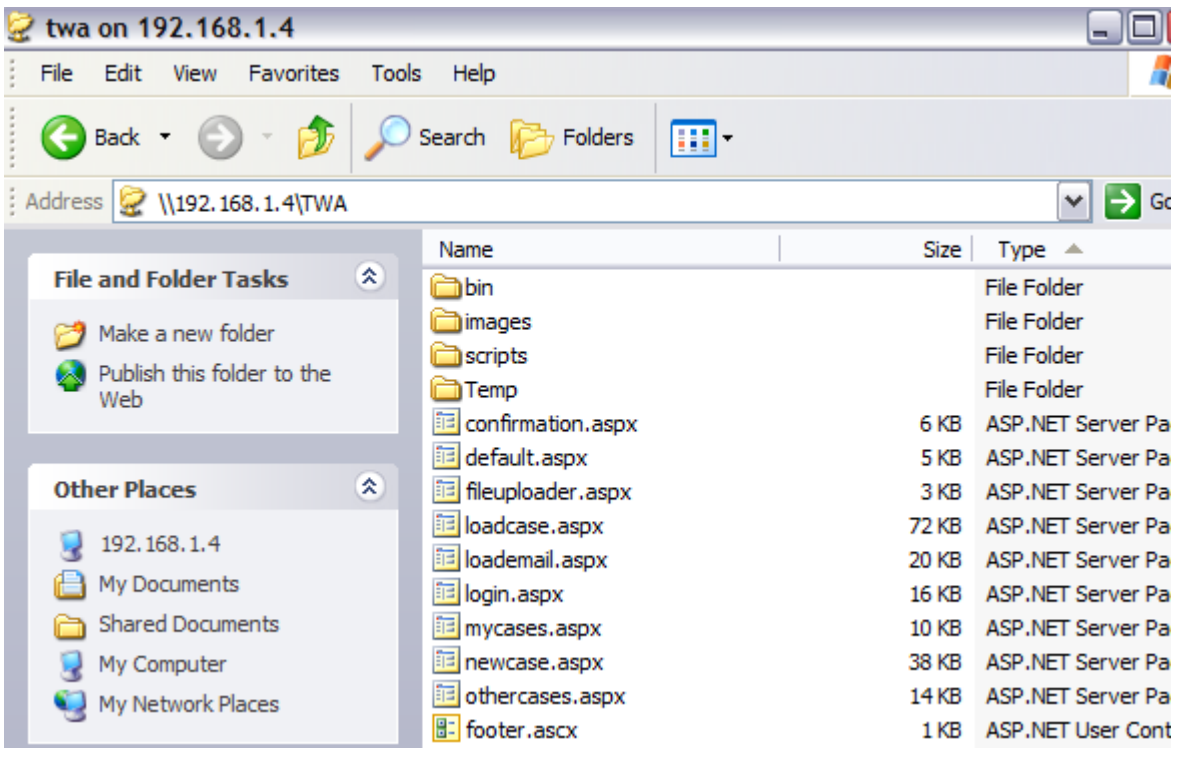
C:\Users\USERNAME\AppData\Roaming\AssistMyTeam\Team Helpdesk SP Resources

The contents of 'TWA.zip' are shown below:



bin	
images	
scripts	
Temp	
confirmation.aspx	5,466
default.aspx	5,044
fileuploader.aspx	2,927
loadcase.aspx	73,227
loademail.aspx	19,487
login.aspx	15,607
mycases.aspx	10,170
newcase.aspx	38,169
othercases.aspx	13,523
footer.ascx	970
header.ascx	3,283
timeout.ascx	1,587
uploader.js	5,530
PrecompiledApp.config	49
web.config	5,468

Extract all the files and subfolders under the zip (e.g. TechnicianWebAccess.zip) file to the network shared web-enabled Technician Web Access (TWA) folder. For example, \\192.168.1.4\TWA where '192.168.1.4' is the windows server and 'TWA' being the web-enabled folder (either configured as a website or virtual directory under an existing website in IIS). If step 2, if the permission (e.g. full control) was successfully set, the files and subfolder would be extracted/copied to the network share.



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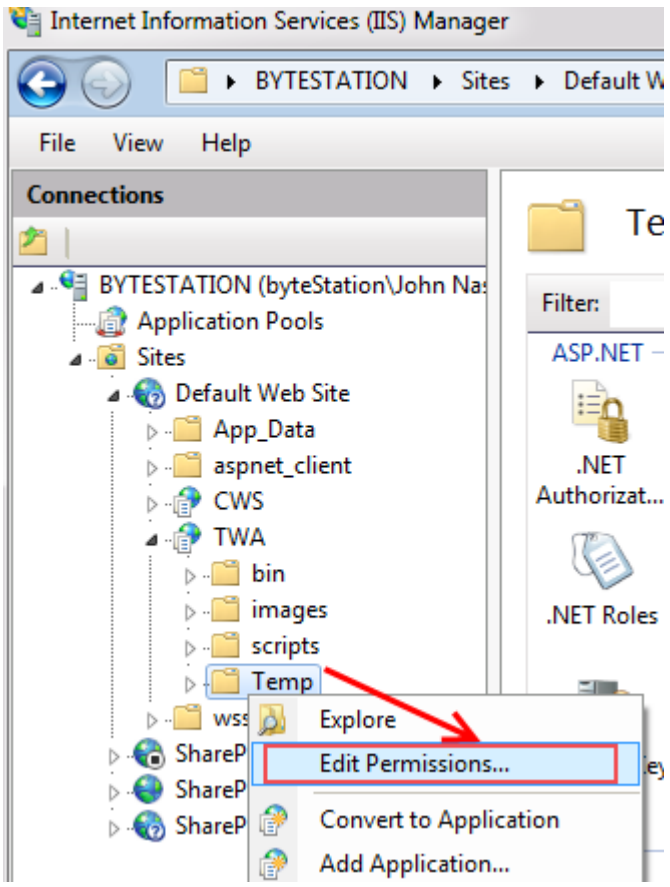
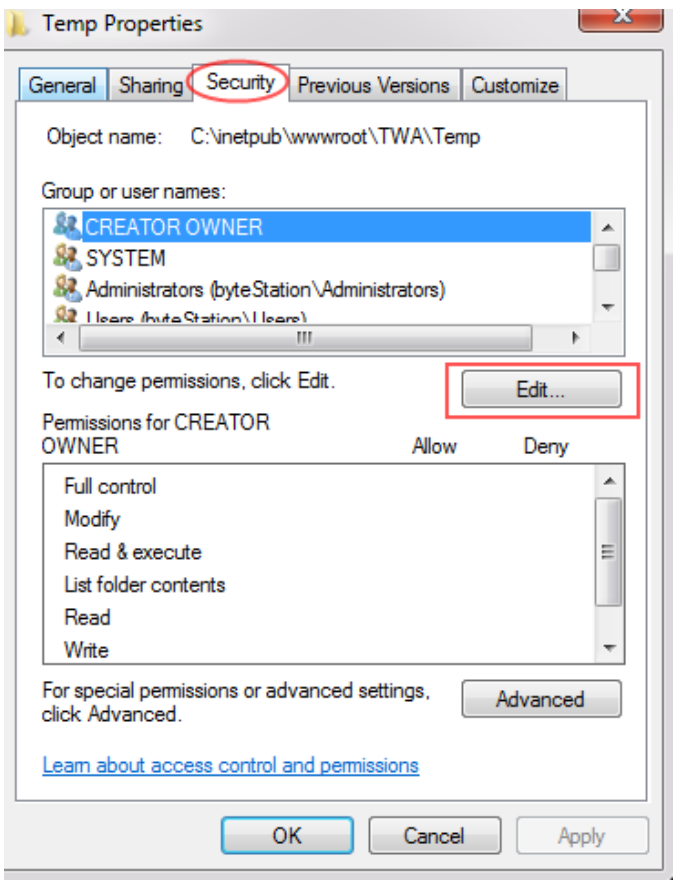
The Technician Web Access functionality is built upon ASP.NET 2.0 and AJAX technology. Typically, an ASP.NET application requires read, execute, and list access for the ASP.NET account (also known as Internet Guest Account) for the web site root (for example: D:\inetpub\wwwroot\TWA or any alternative site directory you may have configured in IIS), the content directory and the application root directory in order to monitor for configuration file changes. The application root corresponds to the folder path associated with the application virtual directory in the IIS Administration tool.

Under your IIS server, you have multiple subfolders under the TWA application. The special interest that we have now is for the **'Temp'** folder, as this is the folder that saves uploaded attachments from support request case temporarily. Hence, the ASP.NET account needs to be configured to have full control over this **'Temp'** folder. You do that by right-clicking 'Temp' folder > '**Edit Permission…**'.

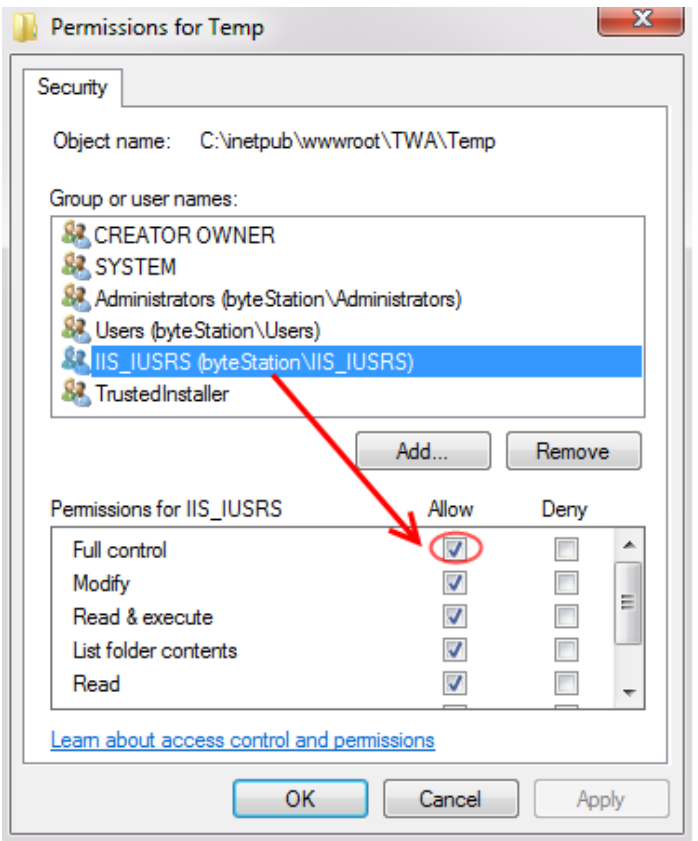




From the Temp properties dialog box, click the '**Security**' tab, and click the '**Edit…**' button to invoke the '**Permissions**' tab.

In the '**Permissions**' dialog box, select the ASP.NET (Internet Guest) account. Different version of IIS has different ASP.NET account name. For example, in IIS version 5 (windows 2000 server), it is ASPNET, and in IIS version 6 (windows server 2003), it is IIS_WPG group whereas in IIS 7 or above version, it is IIS_IUSRS group.

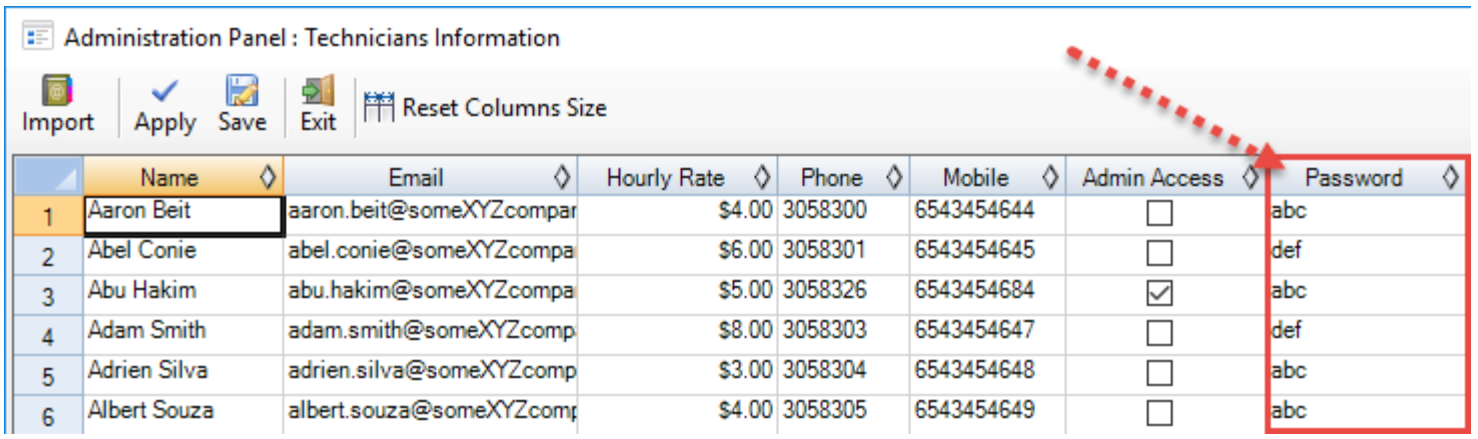
In the screenshot below, we have IIS 7 version and hence, the **IIS_IURS** group is allowed 'Full Control' over the 'Temp' folder.



Step 5: Configure TWA specific settings from Outlook

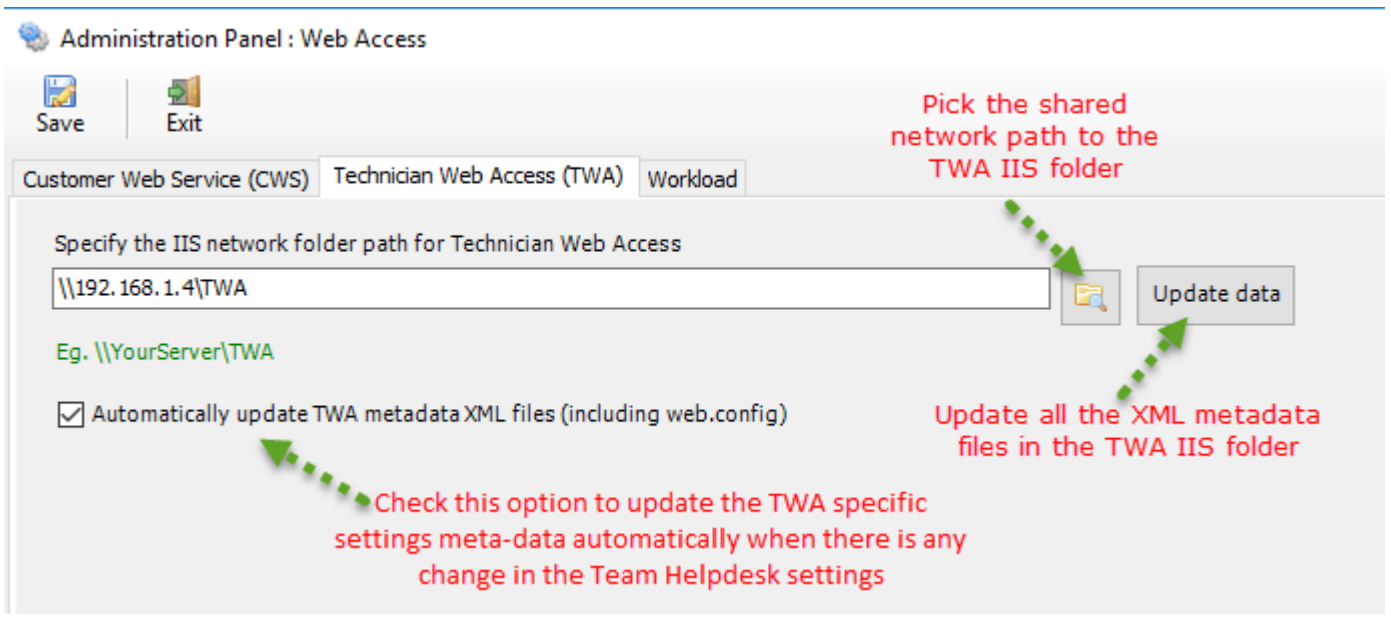
The Technician Web Access (TWA) site does not make use of a database to store the helpdesk settings and lists. Instead, the data and settings are stored as XML metadata files and are saved/updated from the Team Helpdesk add-in interface in Outlook (by helpdesk managers/technicians). The document takes you to finer detail on various web access settings that need to be configured in the administrative tool, before saving/updating the XML metadata files in the IIS folder.

Define password for each technician for web access: Open up the *Team Helpdesk Manager menu > 'Technicians list'* panel and for each technician, define a password to enable individual technician to login to Technician Web Access on the web using the technician's email ID and password.



	Name	Email	Hourly Rate	Phone	Mobile	Admin Access	Password
1	Aaron Beit	aaron.beit@someXYZcompar	$4.00	3058300	6543454644	☐	abc
2	Abel Conie	abel.conie@someXYZcompa	$6.00	3058301	6543454645	☐	def
3	Abu Hakim	abu.hakim@someXYZcompa	$5.00	3058326	6543454684	☑	abc
4	Adam Smith	adam.smith@someXYZcomp	$8.00	3058303	6543454647	☐	def
5	Adrien Silva	adrien.silva@someXYZcomp	$3.00	3058304	6543454648	☐	abc
6	Albert Souza	albert.souza@someXYZcomp	$4.00	3058305	6543454649	☐	abc

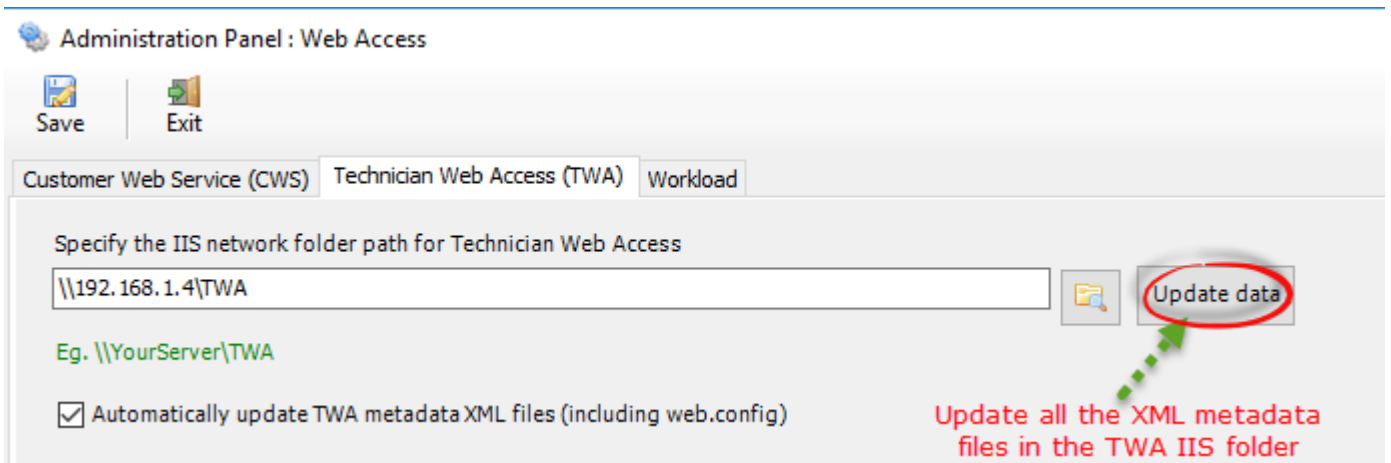
There is an exclusive web access setting dialog, which is displayed above. To save/update the XML metadata files from Outlook to the shared network web-enabled folder (on the server), it needs to know the full UNC folder path. If the network folder resource requires a network credential, then you will be prompted to enter.



Step 6: Write/Update XML metadata files from Outlook

The last remaining step is to save/update the Technician Web Access (TWA) specific XML metadata files in the TWA network web-folder. The XML metadata files contain the required Team Helpdesk lists and settings defined by the helpdesk manager in Outlook and these files feed data to the Technician Web Access applications when end-users submit new support requests via web-form or when technician login to load their assigned cases.

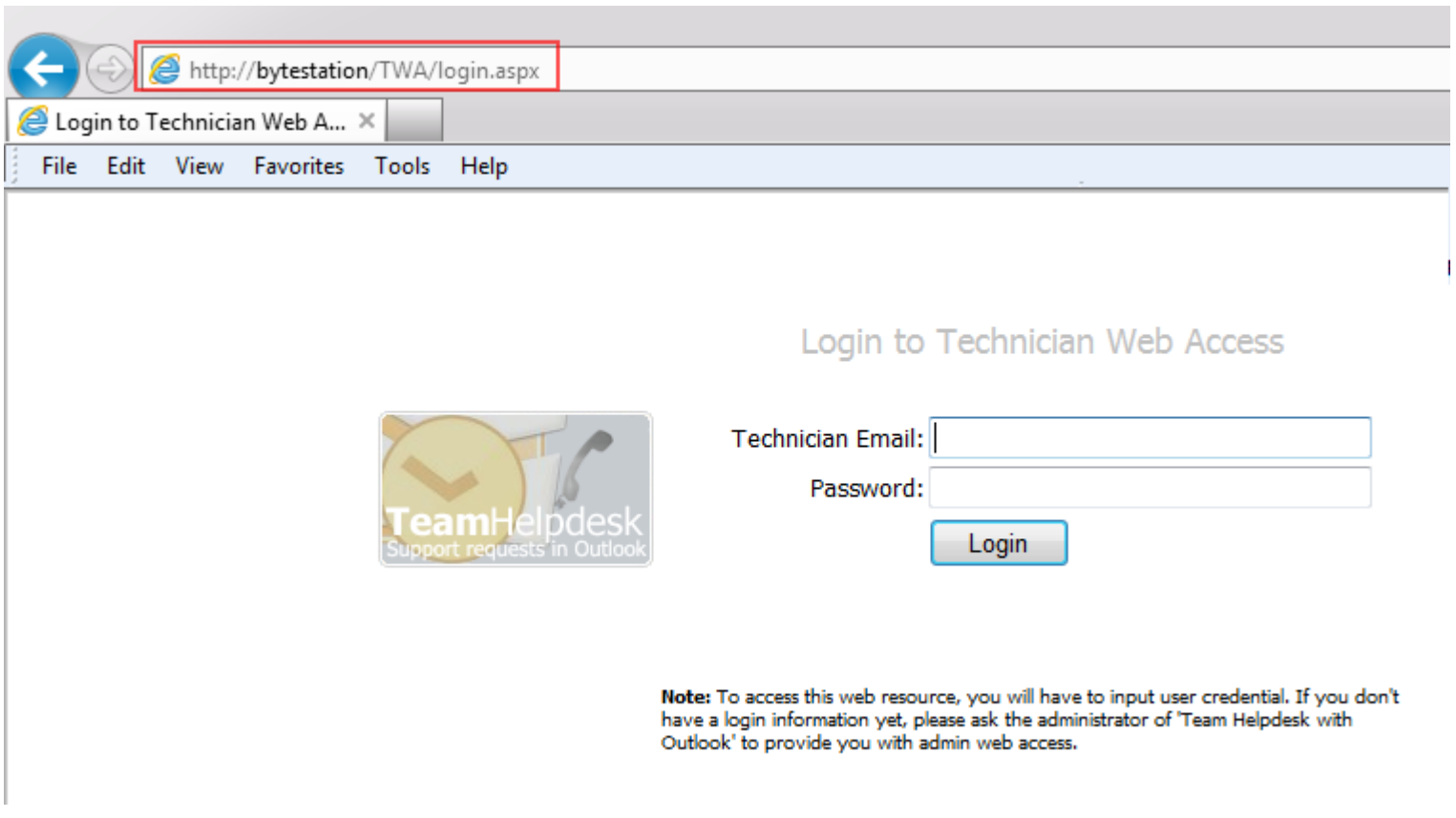
Before any XML data files can be updated, the helpdesk manager needs to specify the network share that was configured in Step 2. If the appropriate permission was set, clicking the **'Update data'** button generate all the required XML files.



Automatically update TWA metadata XML files (including web.config): In due course, the Team Helpdesk lists and settings would change/update (e.g. problem categories and types). This requires the helpdesk manager to manually update the web access XML metadata files accordingly (by clicking the **'Update data**'), so that data used in the web access application is in synch with that in Outlook. Though the helpdesk manager can manually update the data files for web access, it would be a tedious task if the settings in Outlook are to change every now and then. In such scenario, it is recommended to allow Team Helpdesk (in Outlook) to automatically update web access specific metadata XML files in the shared network folder, when there are any changes in the lists and settings in Outlook.

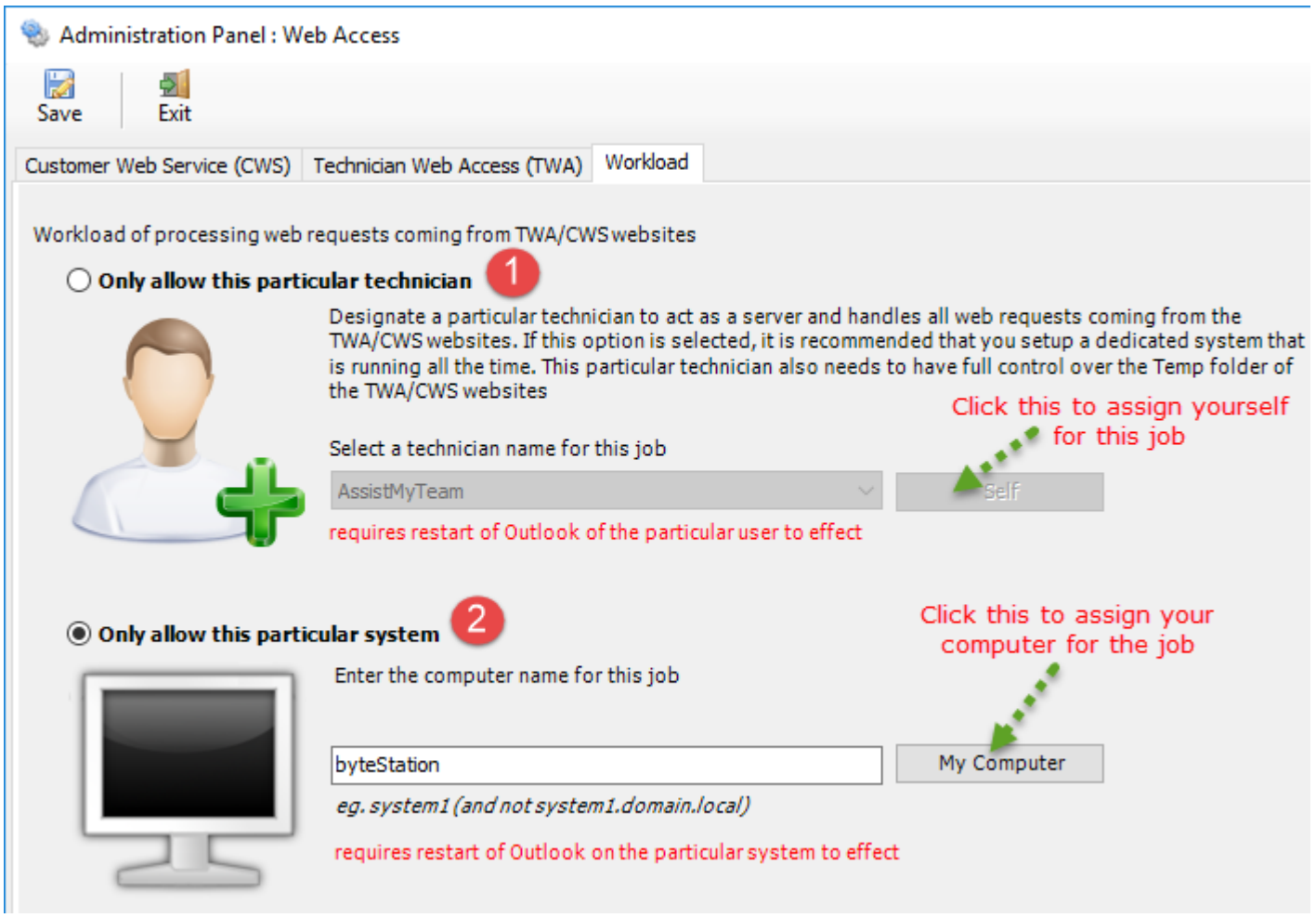
Now, open your web browser and point to the TWA URL. Usually the URL is in the format **http://SERVER/TWA/**

For example, in our instance, it would be *http://byteStation/TWA/*



Workload – Assign responsibility for Web Access Servicing

In Team Helpdesk, you need to specify which helpdesk manager add-in would be responsible for monitoring and servicing all the web requests coming from the Customer Web Service (CWS) and Technicians Web Access (TWA) websites. You can choose a particular technician or a dedicated system (that has the manager installed) for this automation job.



1 Choose this option to assign a particular technician whose helpdesk manager add-in will be responsible for servicing all web requests from CWS and TWA websites (if configured).

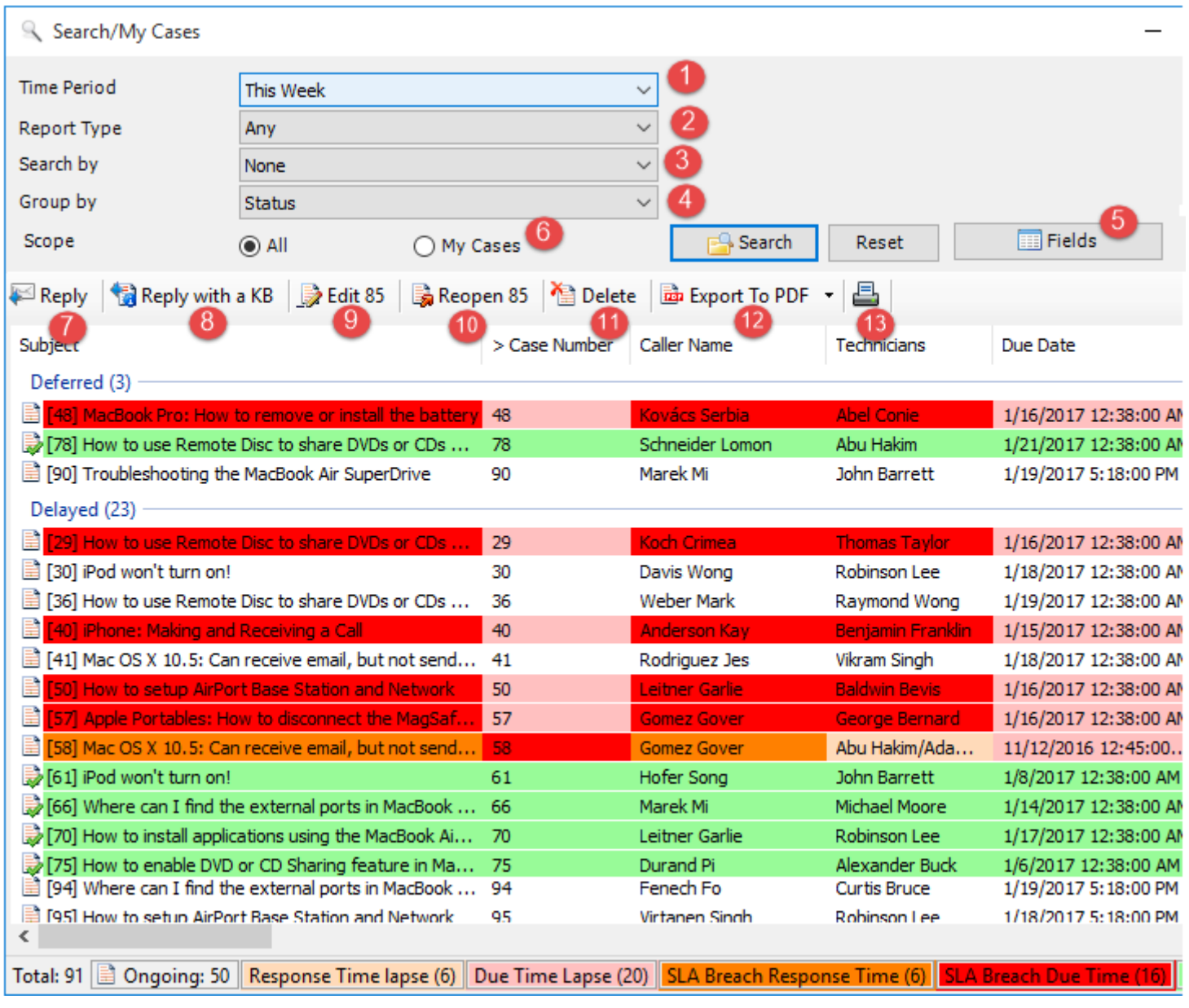
NOTE: If you want to set yourself, just click the '**Self**' button (located on the right)

2 Choose this option to assign a dedicated system that has helpdesk manager add-in installed as responsible for servicing all web requests coming from CWS and TWA websites. Enter the computer name without the domain information. For example, if the full qualified system name is *system1.domain.local* only enter '**system1**'.

NOTE: If you want to set your current system, just click the '**My Computer**' button (located on the right)

5. Search Cases

So, you have a repository of support request cases stored in your exchange folders. As the number of logged cases multiplies, finding the right information at the time of need is crucial for helpdesk team. For example, more so then often, technicians would require querying information based on particular cases, assets, callers etc. Team Helpdesk supports a comprehensive search capability with rich filter sets including full text search on case description body, or on predefined drop-down lists such as caller, technician, department etc.



1 **Time Period:** Choose a time period from the followings under which the search will be confined:

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

2 **Report Type:** Choose a report type from the predefined ones below:

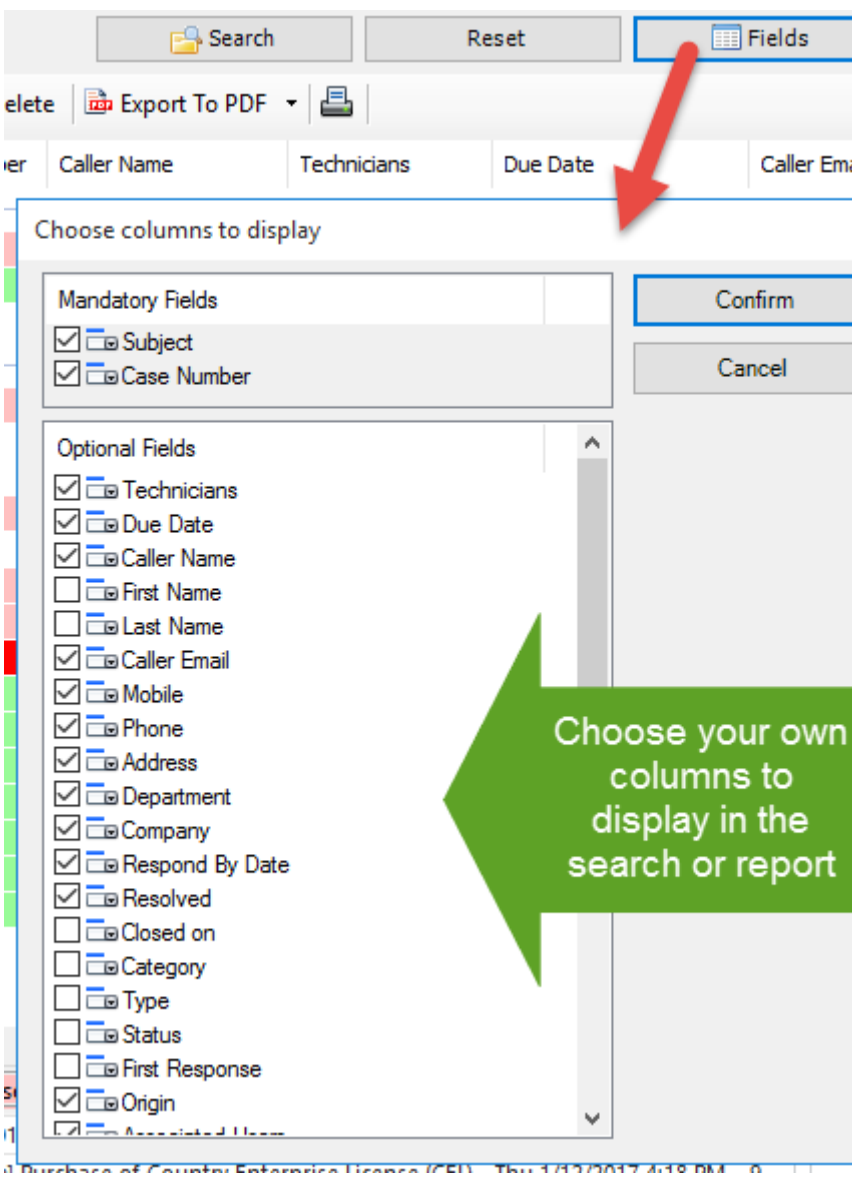
Any
Cases Created
Cases Resolved
Cases Ongoing
Cases Worked
Cases Due
Cases Response Date
Cases unassigned
Cases lapsed - Due Time
Cases lapsed - Response Time
Cases with SLA Breach - Due Date
Cases with SLA Breach - Response Date
Cases with no Due Date
Cases with no Response Date
Cases with no Service Level
Cases with no Caller

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

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

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

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



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

7. **Reply:** Compose and send a reply email to the caller of the selected case.

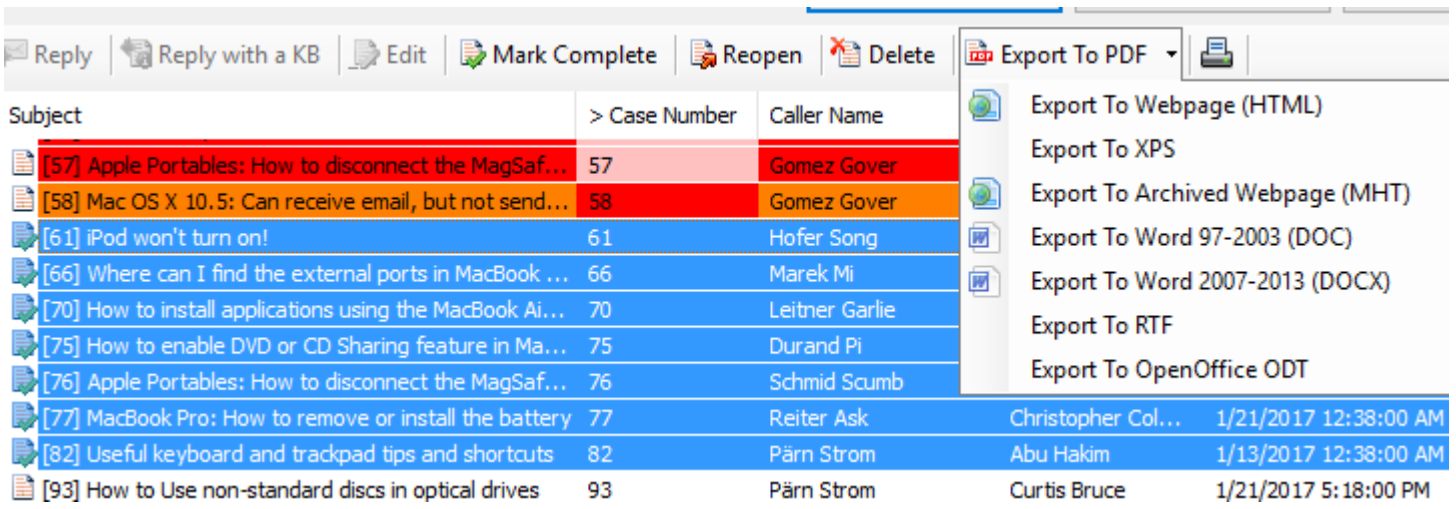
8. **Reply with a KB:** Choose a KB article and embed it to a reply email to the caller.

9. **Edit:** Open the selected case in its inspector window in Outlook for viewing or further editing.

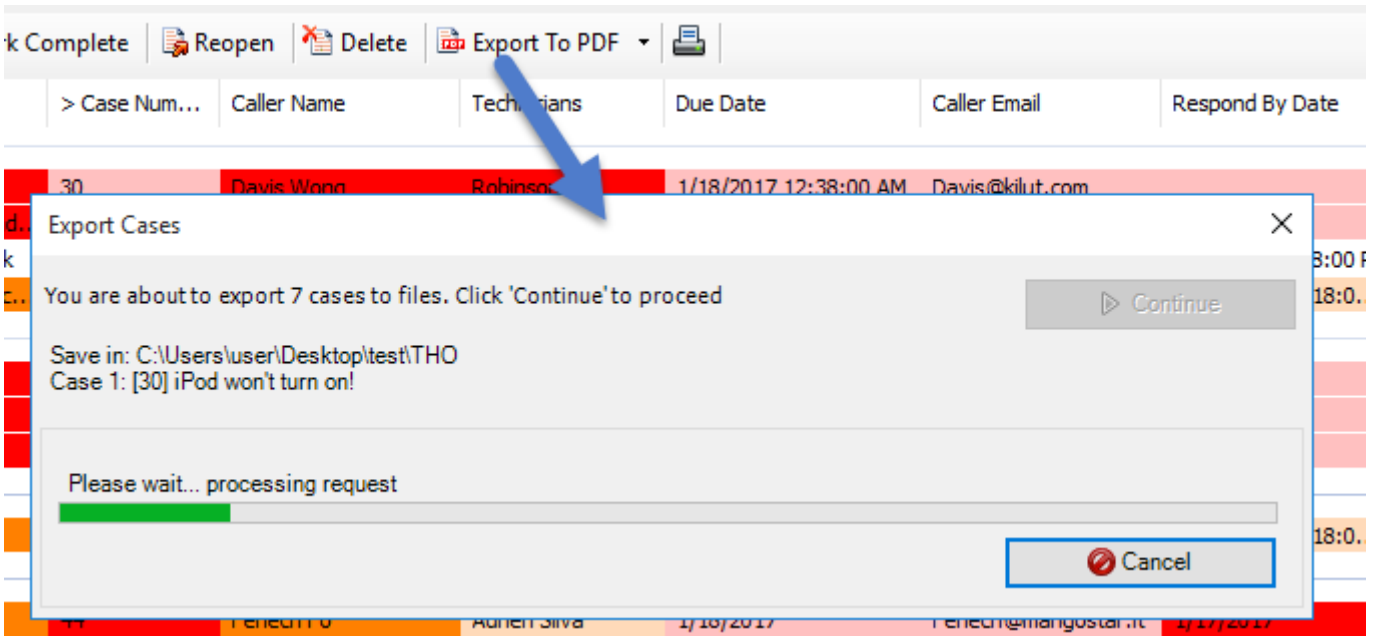
10. **Mark Complete / Re-Open:** If the selected case is ongoing, you can click this button to mark it complete. And if it a resolved case, you can click to re-open it,

11. **Delete:** Permanently remove the selected cases from the Team Helpdesk folders

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



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



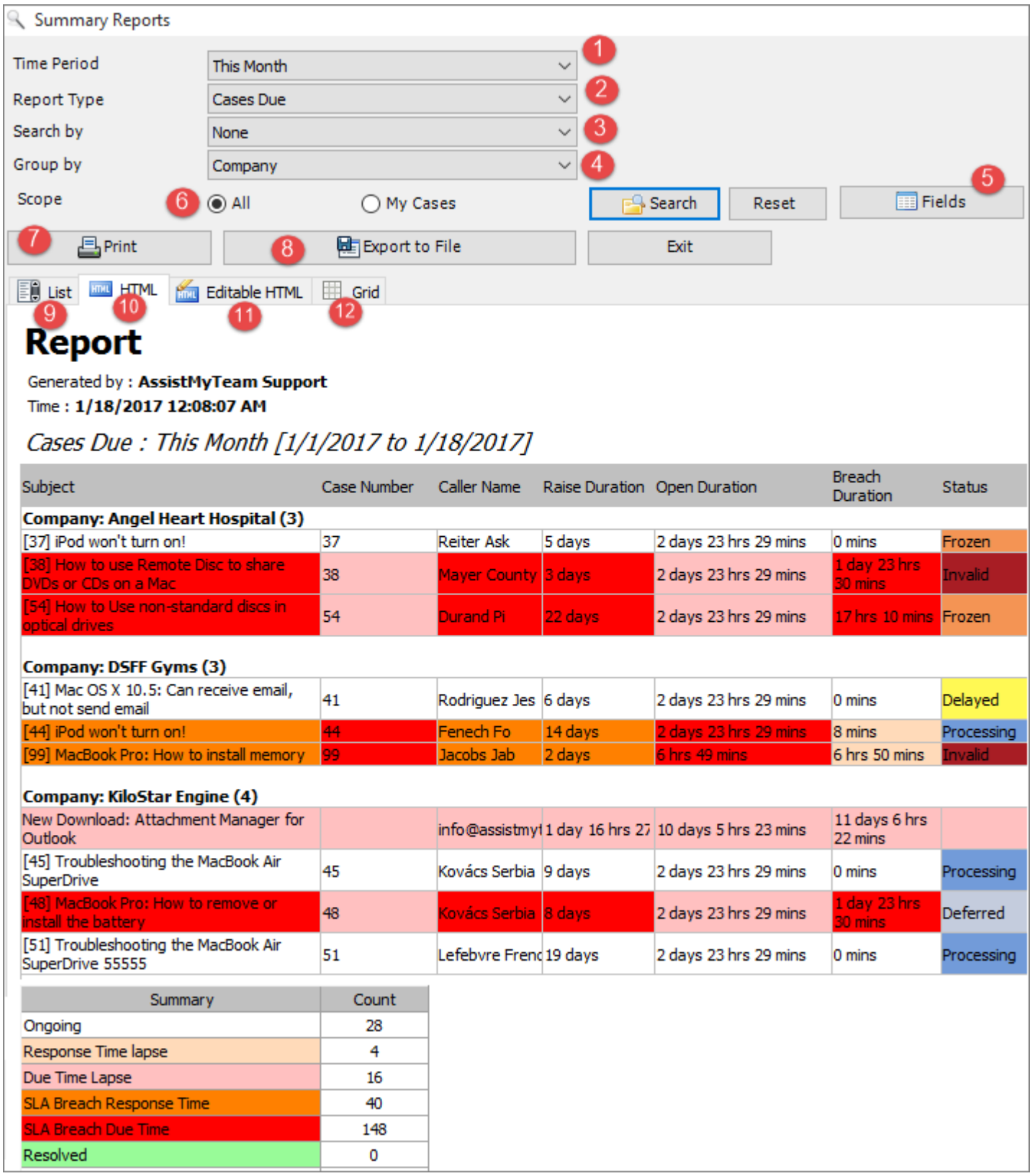
You can control what case data are included in the files by customizing the '**Print**' template under *Team Helpdesk Manager > Templates Manager.* For example, place the variable **'SCO_CASEDESCRIPTION'** in the Print template such that the exported file (e.g. pdf) contains all the consolidated conversations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

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

6. Helpdesk Summary Reports

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

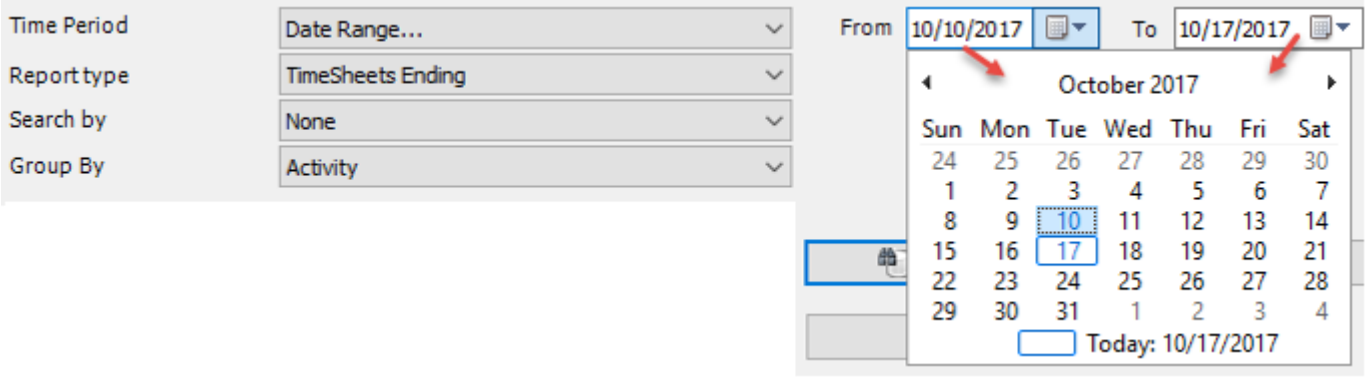
There are four report view modes **- List, HTML, HTML Editable** and **Grid**. Noticed that this report tool also uses the same sets of search filters discussed in the last section.



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

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

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



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

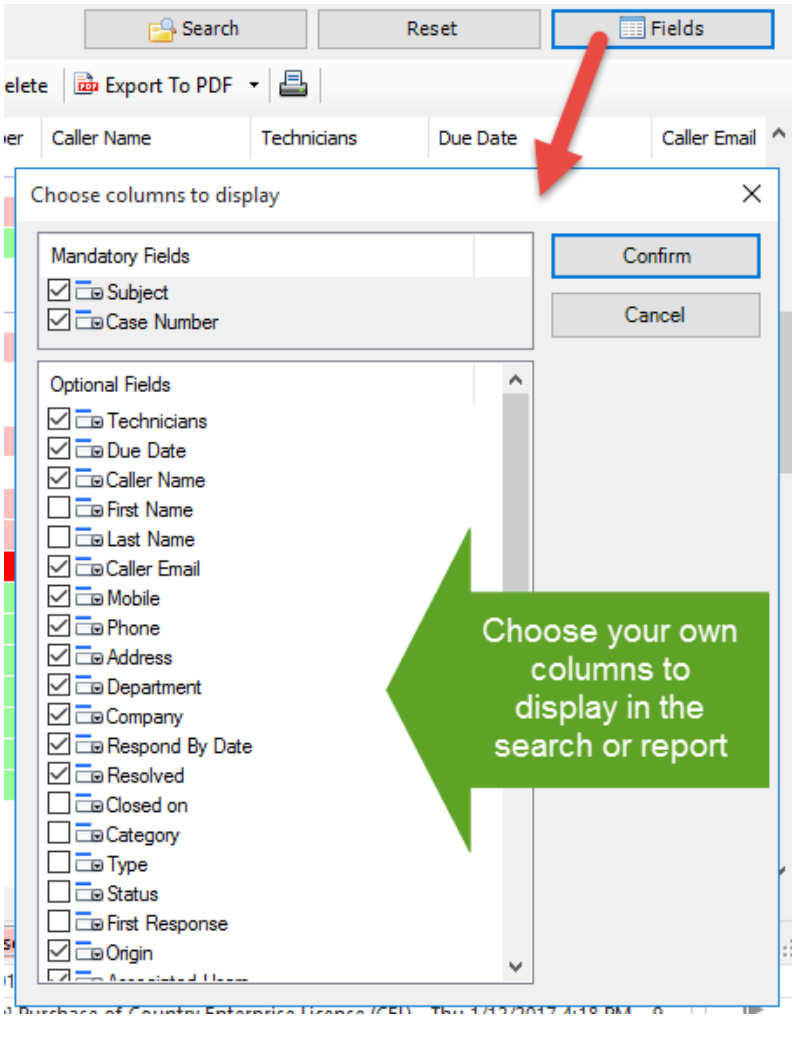
3 **Search By:** Further refine the search by filtering through keywords or using one of the following helpdesk fields:
Status, Problem, Service level, Caller, Department, Company, Priority, Origin, Assets or Author.

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

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

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

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



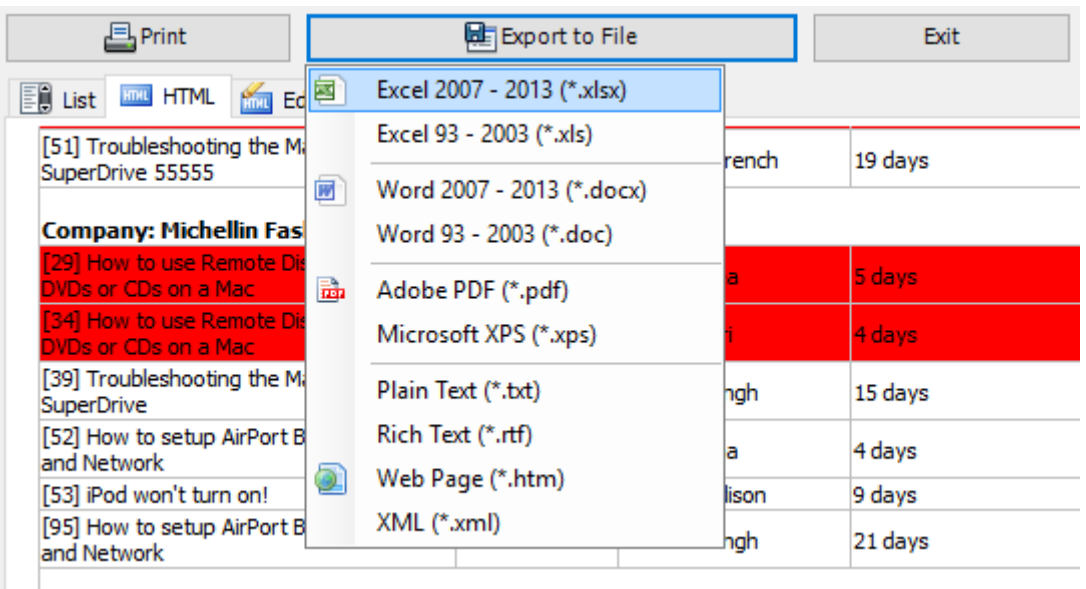
Some useful calculated fields that you can include in the report:

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

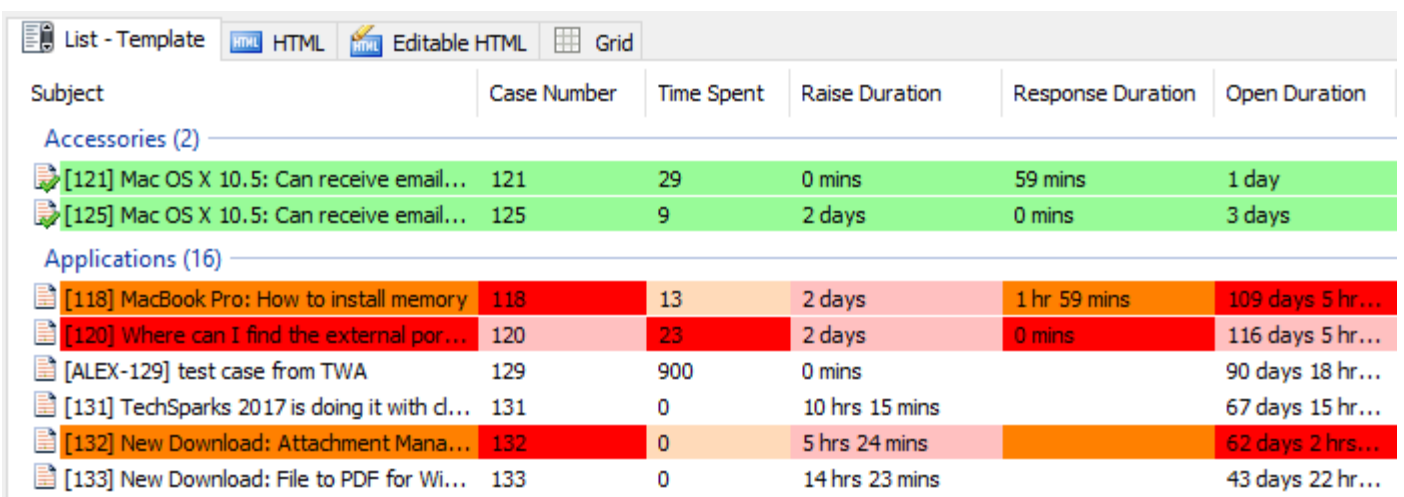
6 **Scope:** Choose if to confine the search to your assigned cases only or include all cases.

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

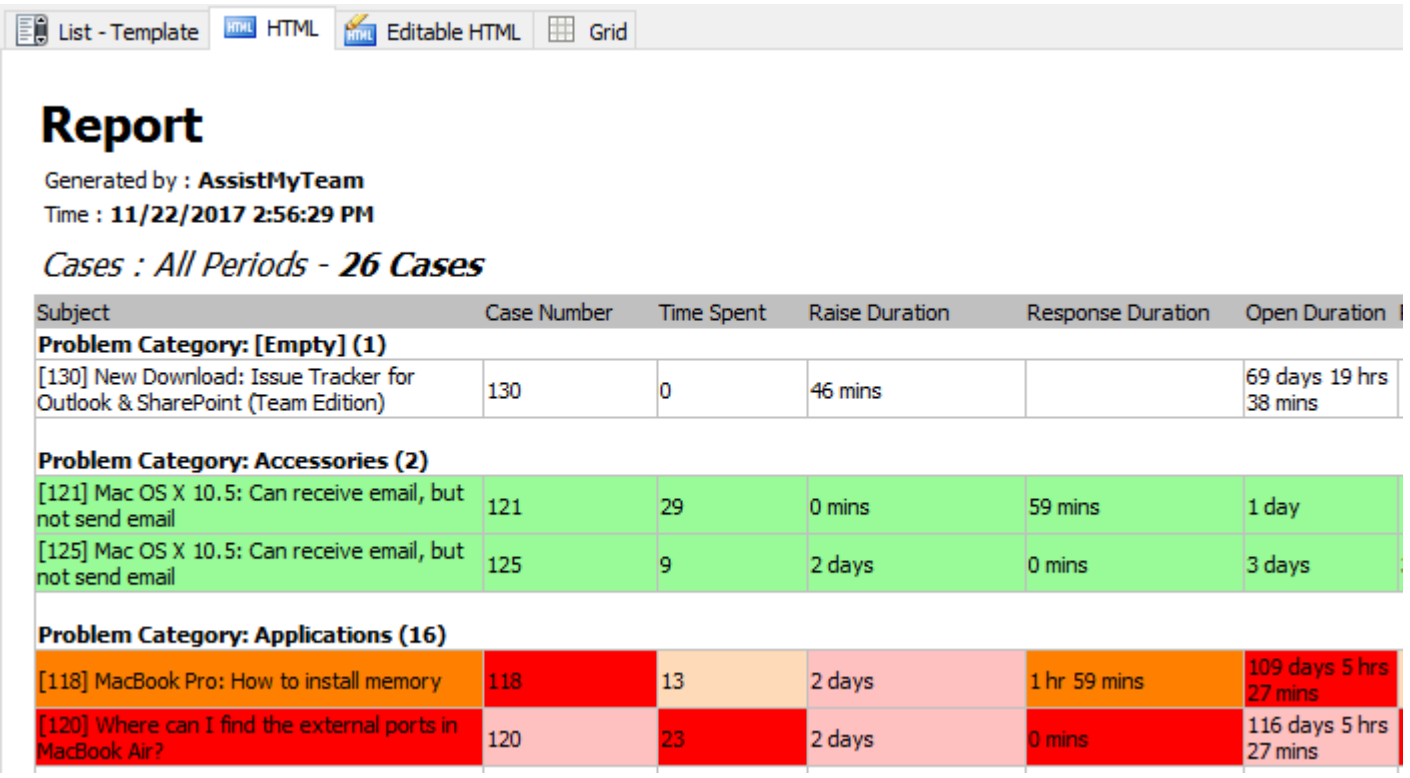
8 **Save the current report to file** – Once you get the look and feel of your report, you can then export the report to one of the many popular document formats supported such as Microsoft Excel sheets, Word documents, Adobe PDF, Rich Text or web page etc.



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



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



List - Template | HTML | Editable HTML | Grid

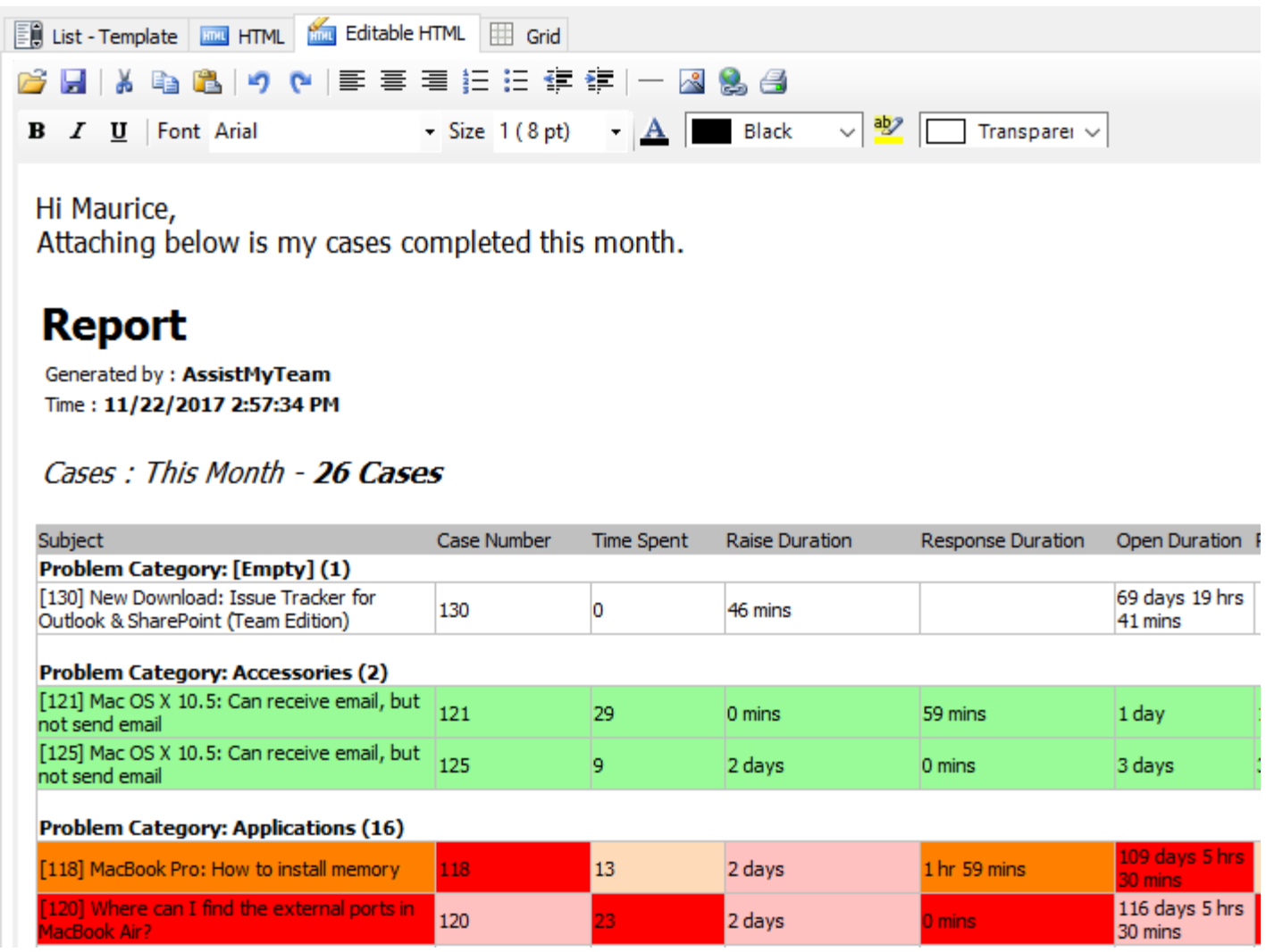
Report

Generated by : **AssistMyTeam**
Time : **11/22/2017 2:56:29 PM**

*Cases : All Periods - **26 Cases***

Subject	Case Number	Time Spent	Raise Duration	Response Duration	Open Duration
Problem Category: [Empty] (1)					
[130] New Download: Issue Tracker for Outlook & SharePoint (Team Edition)	130	0	46 mins		69 days 19 hrs 38 mins
Problem Category: Accessories (2)					
[121] Mac OS X 10.5: Can receive email, but not send email	121	29	0 mins	59 mins	1 day
[125] Mac OS X 10.5: Can receive email, but not send email	125	9	2 days	0 mins	3 days
Problem Category: Applications (16)					
[118] MacBook Pro: How to install memory	118	13	2 days	1 hr 59 mins	109 days 5 hrs 27 mins
[120] Where can I find the external ports in MacBook Air?	120	23	2 days	0 mins	116 days 5 hrs 27 mins

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



List - Template | HTML | Editable HTML | Grid

Font Arial | Size 1 (8 pt) | Black | Transparei

Hi Maurice,
Attaching below is my cases completed this month.

Report

Generated by : **AssistMyTeam**
Time : **11/22/2017 2:57:34 PM**

*Cases : This Month - **26 Cases***

Subject	Case Number	Time Spent	Raise Duration	Response Duration	Open Duration
Problem Category: [Empty] (1)					
[130] New Download: Issue Tracker for Outlook & SharePoint (Team Edition)	130	0	46 mins		69 days 19 hrs 41 mins
Problem Category: Accessories (2)					
[121] Mac OS X 10.5: Can receive email, but not send email	121	29	0 mins	59 mins	1 day
[125] Mac OS X 10.5: Can receive email, but not send email	125	9	2 days	0 mins	3 days
Problem Category: Applications (16)					
[118] MacBook Pro: How to install memory	118	13	2 days	1 hr 59 mins	109 days 5 hrs 30 mins
[120] Where can I find the external ports in MacBook Air?	120	23	2 days	0 mins	116 days 5 hrs 30 mins

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

List - Template | HTML | Editable HTML | Grid

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

7. Helpdesk OLAP Statistics and Reporting

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

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

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

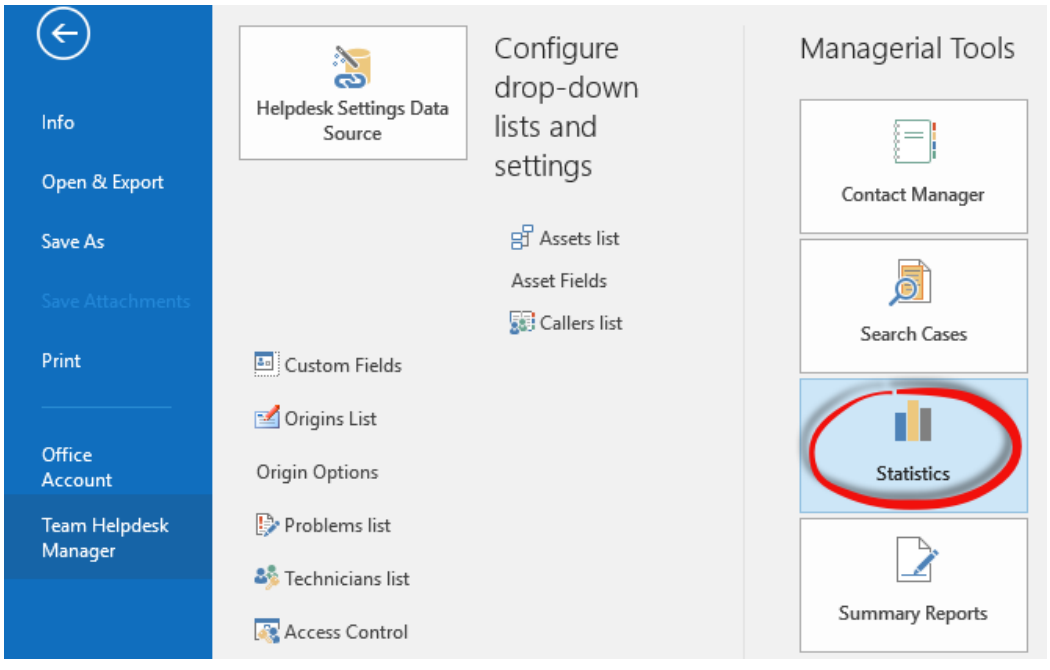
Printing capabilities - you can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including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

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

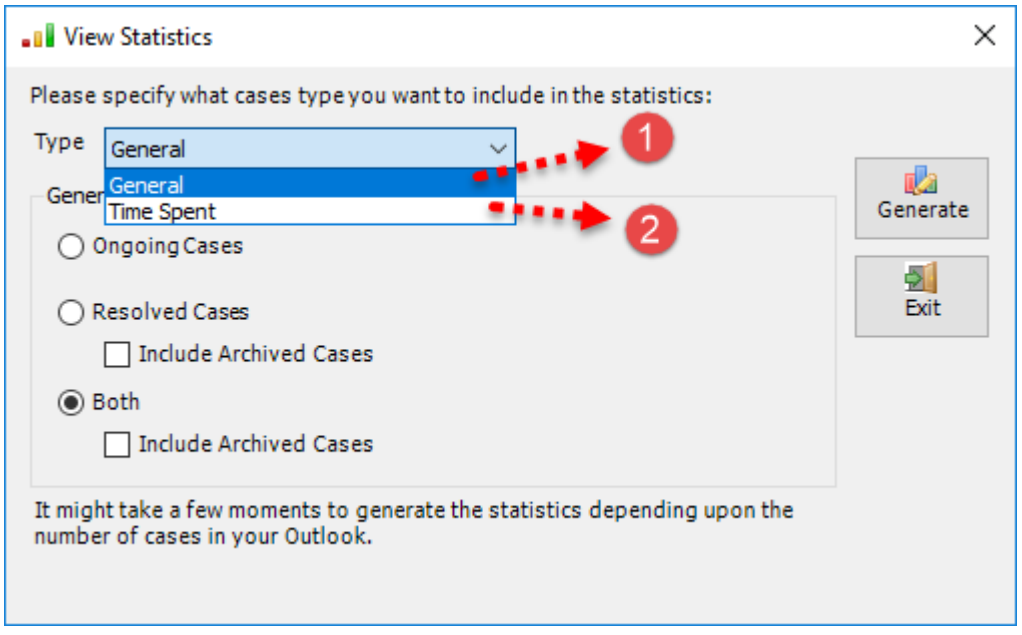
Save Reports in file - At any stage managers/technicians can save the report and distribute it to another person for analysis by network or email, so when the recipient gets the file he can open it and see the same OLAP slice.

<u>Launching the statistics tool:</u>

Go to **Outlook > File > Team Helpdesk Manager** tab, and click '**Statistics**' button.



You can choose what type of OLAP statistics on helpdesk data you would like to see and report on. You can specify if the statistics would be confined to ongoing cases or resolved cases or on both. You can further have the choice to include archived old cases that were moved to another exchange folder or PST file.



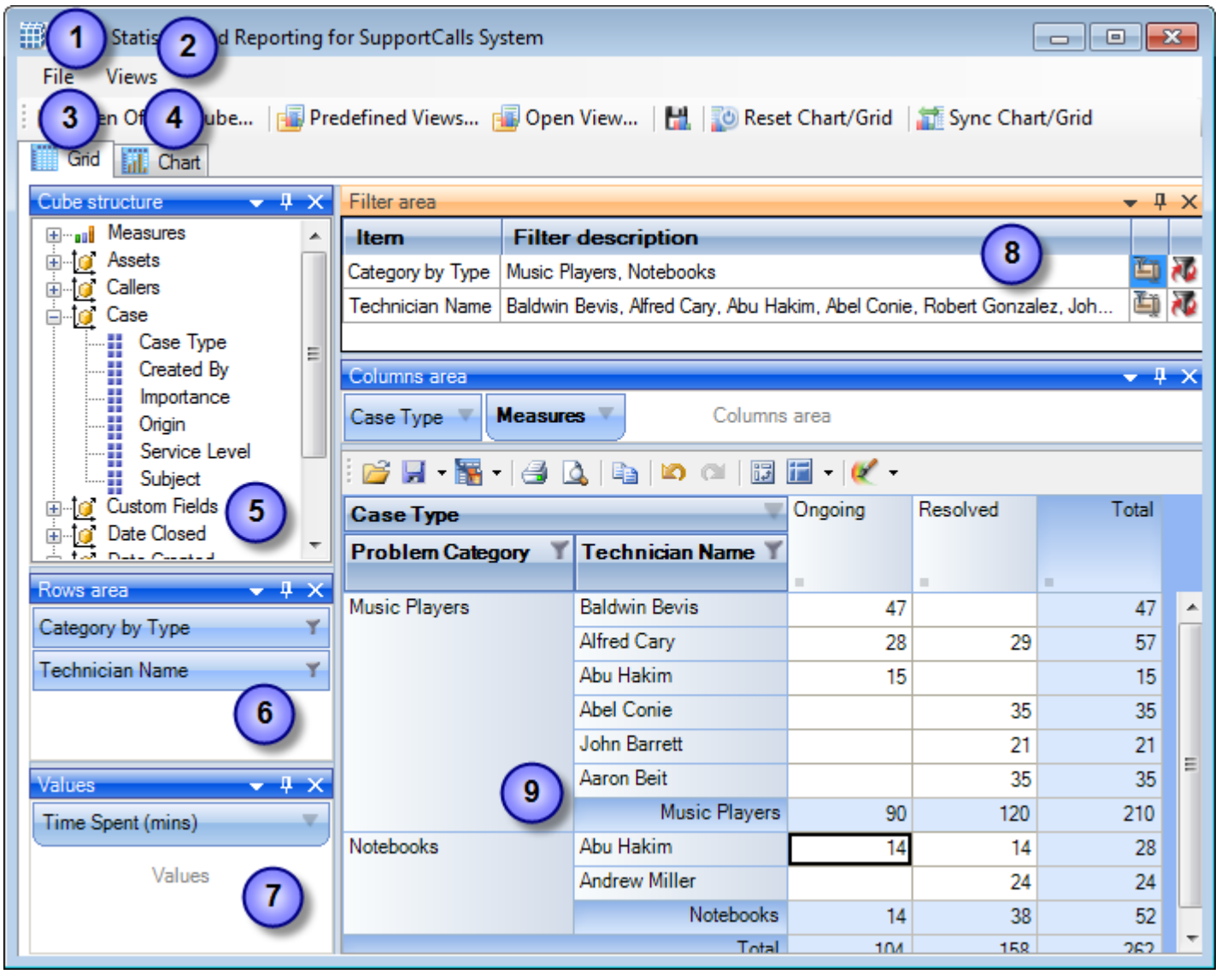
There are two parts of OLAP Statistics

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

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

7.1 The User Interface

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



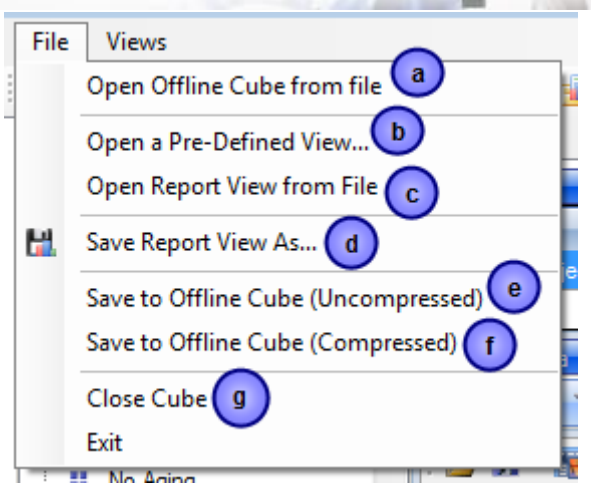
Instrumental panels can be:

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

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

1 **The File menu**

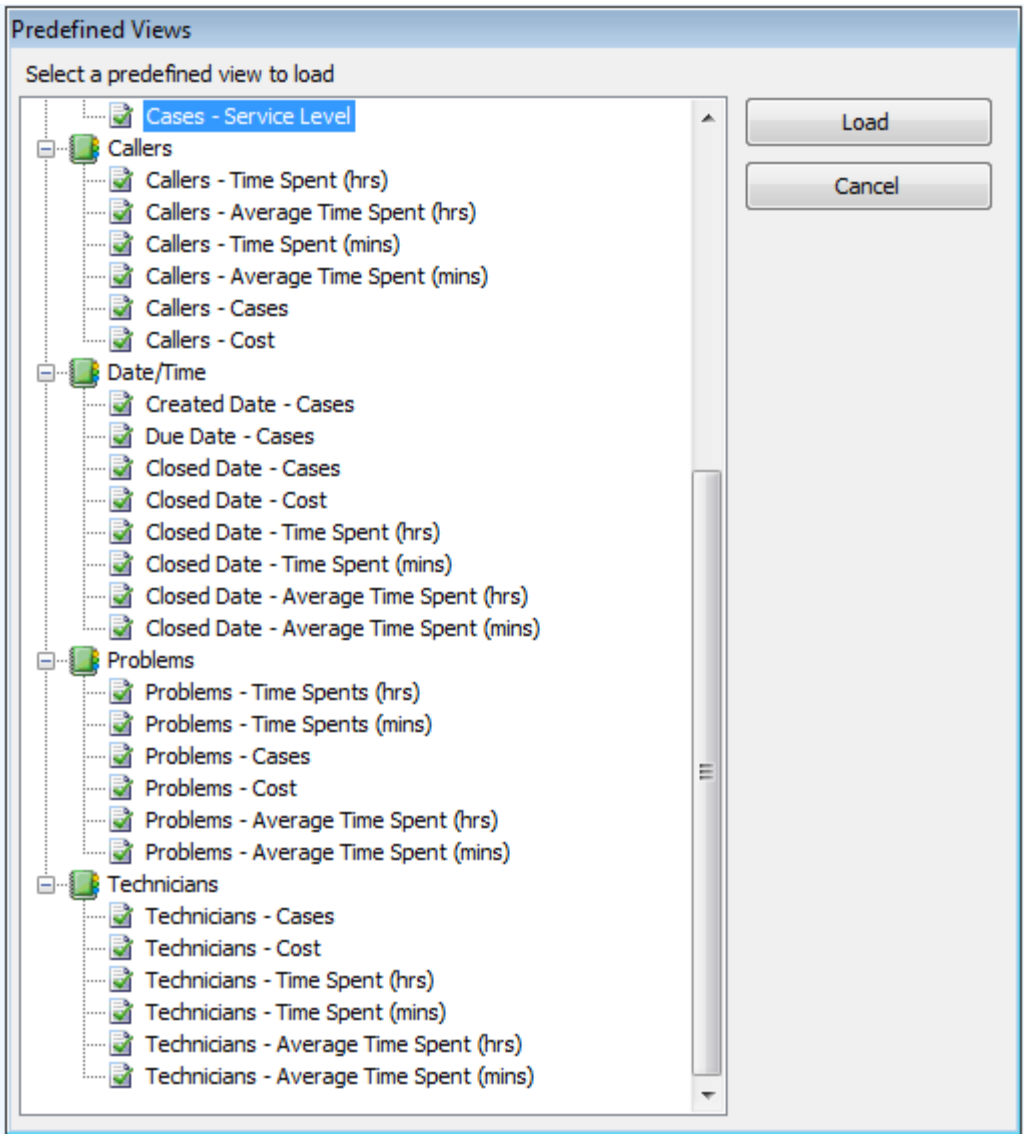
The file menu consists of the following commands:



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

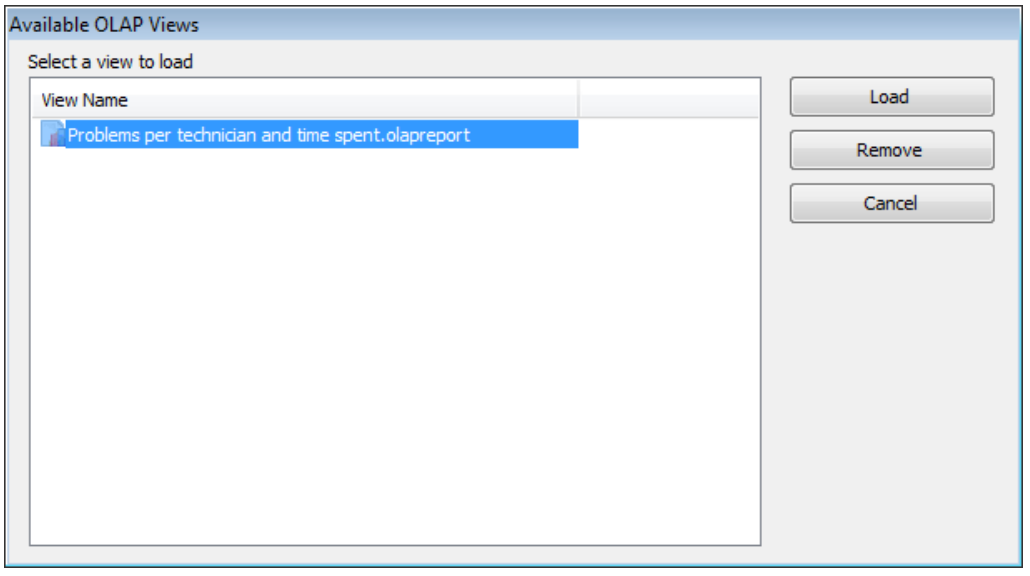
In such scenario, you have the option of connecting to an offline cube, which was previously generated and saved to your local folder using this utility. An offline cube file has the extension - ***.offlinecube*** and can be either in compressed or uncompressed format. An offline cube gives the same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

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

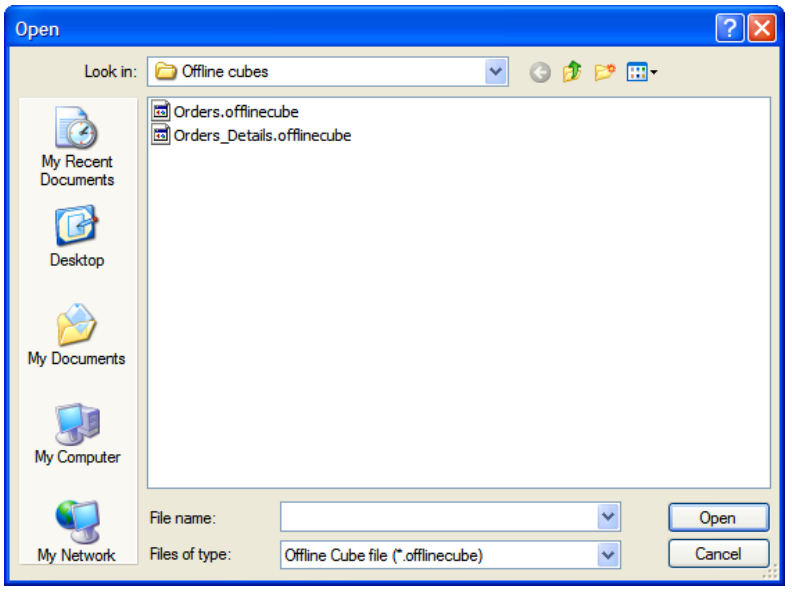


c) Load report file from Favorite – You can customize or create your own views and save them to the favorite. Once saved, your views would be saved under the 'C:\Users\USERNAME\Documents\Team Helpdesk

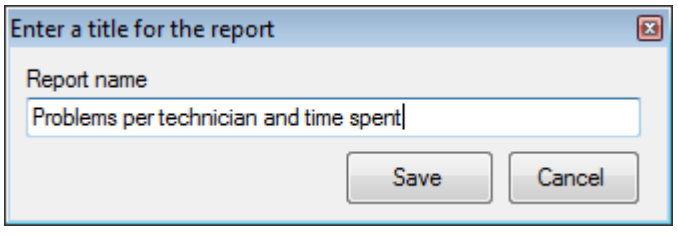
Reports\Views' folder (in windows Vista and 7). For windows XP, it should under My Documents. When you open the favorite from this menu, you can choose to load your saved view.



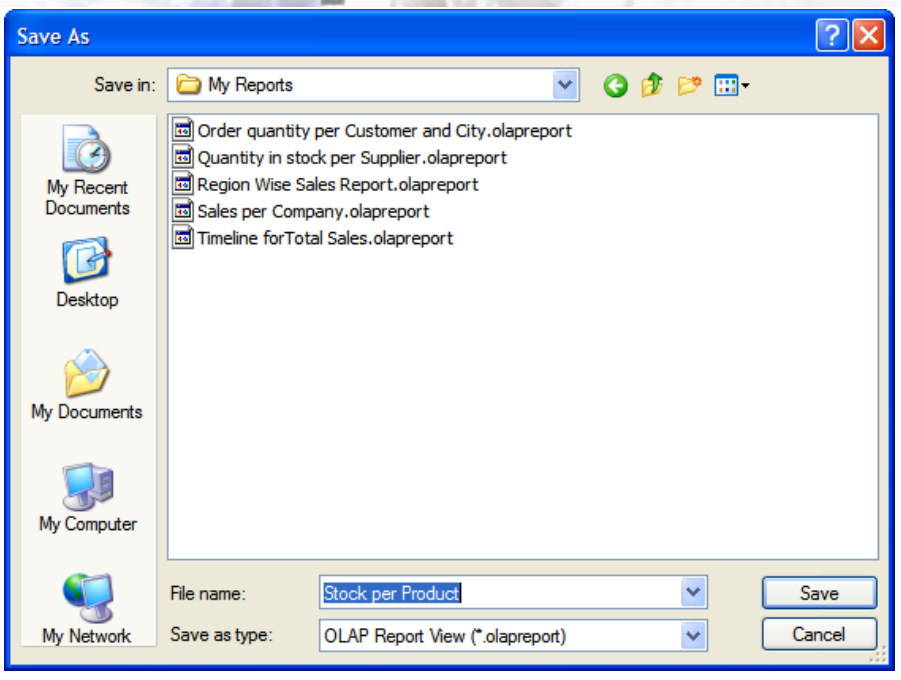
d) **Open report view from file** - Once a particular snapshot of the statistics is achieved, you may want to save it for future reference or share it among your team members. A report view is the current state of the statistics in the Grid/Chart working area, with specific member fields on the pivot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



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



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



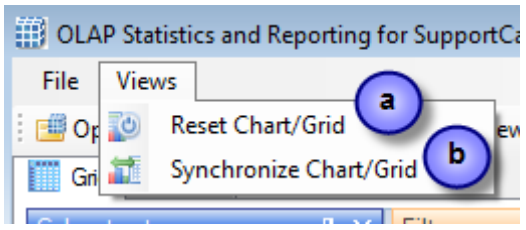
g) **Save to offline Cube** – Once you have loaded a live cube from the cases, you have the option to save the entire cube data to a file (with the extension - ***.offlinecube***) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed format,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

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

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

2 **View Menu**

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



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

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

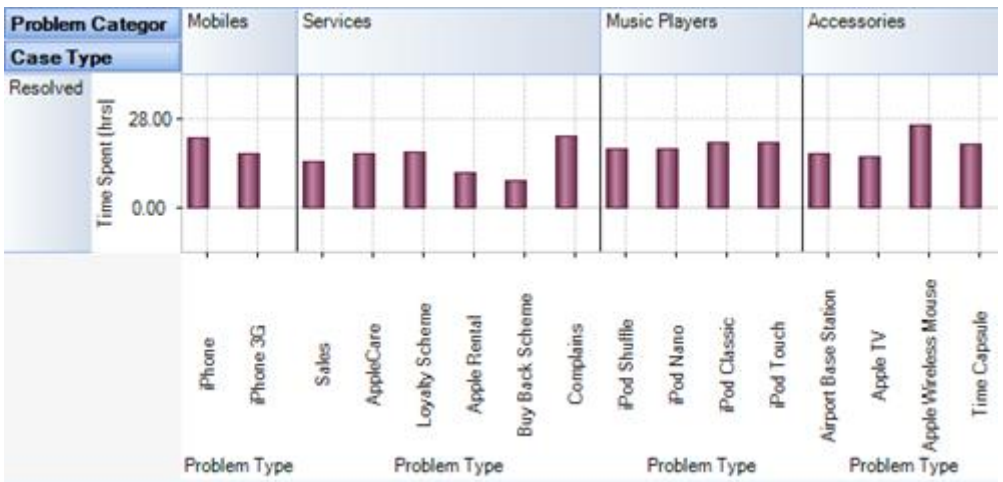
For example, if you are in the grid view, and if you pressed 'Synchronize Chart/Grid' it would read the state of the Grid view and impart the same state (same members and measures) to the Chart view and vice versa. Each of the Grid and Chart view can be worked independently as long as you don't press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

3 **OLAP Grid panel**

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

4 **OLAP Chart panel**

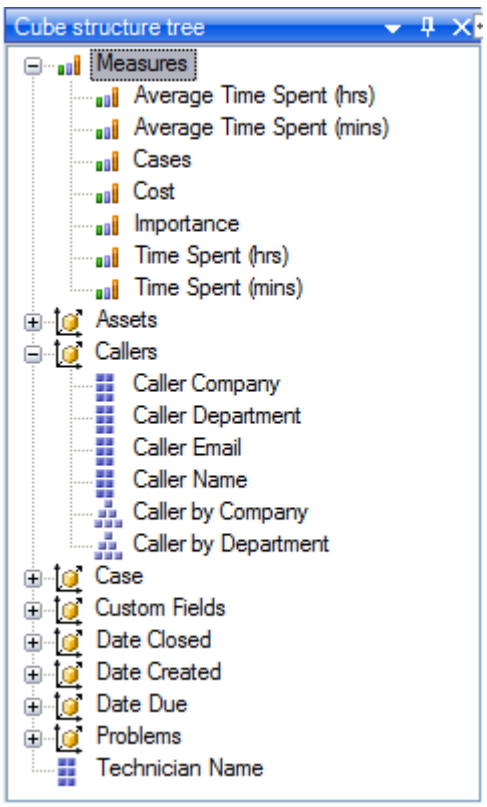
While OLAP Grid allows working with numbers, the OLAP Chart allows representing the project data graphically. This gives managers and members a unique opportunity to analyze their project data visually, dealing with charts rather than numbers, which is much easier to perceive.



5

Cube structure panel

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



- Measure
- Dimension
- Attribute hierarchy
- Multilevel hierarchy

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

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

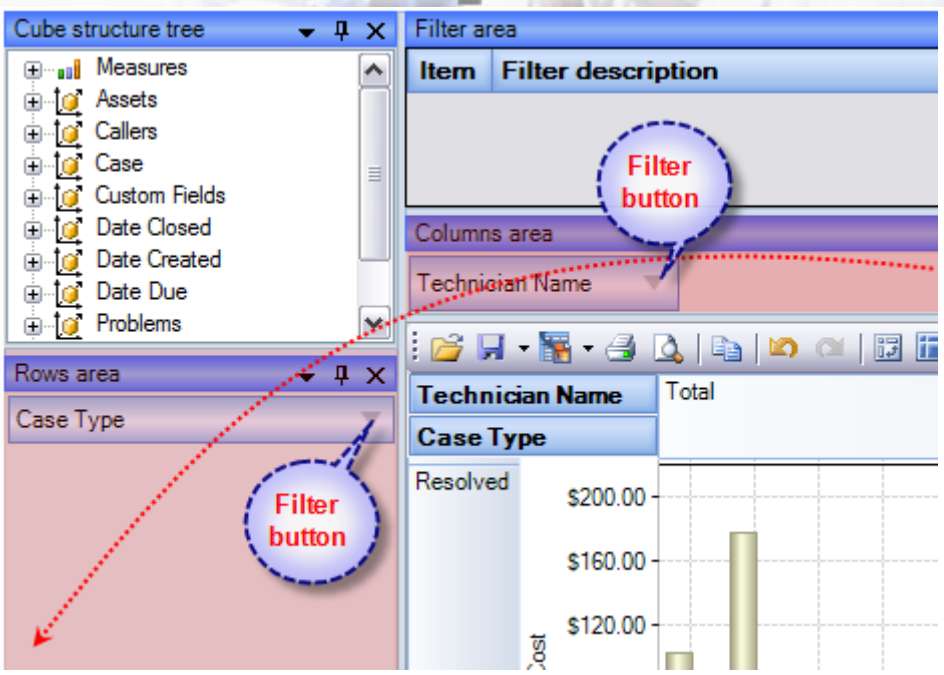
- Measures are grouped in the Measures category.
- Hierarchies are sorted into folders - dimensions. If there's only one dimension in a hierarchy, it will be displayed in the tree root.

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

6

Pivoting panels

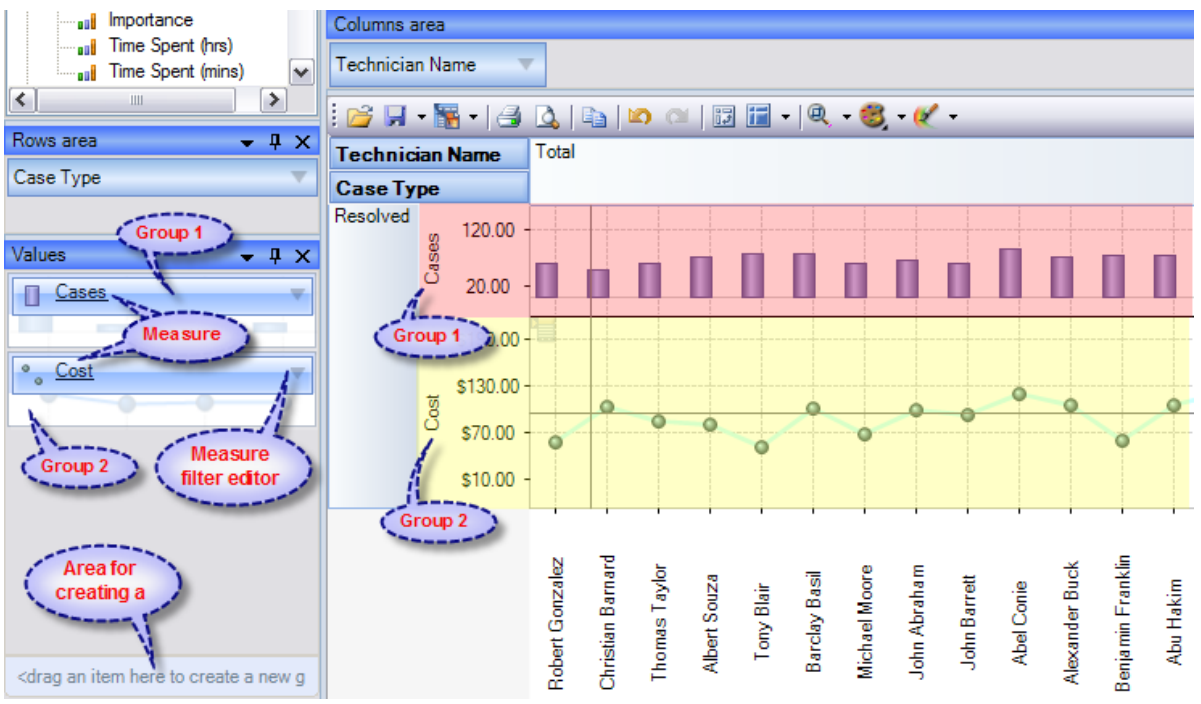
A pivot table lets user design the report online by dragging and dropping measures, dimensions and levels into the pivoting panels. Note that the column panel may contain no more than one (!) measure. Panel elements can be dragged with the mouse to other panels. To filter elements, press the Filter button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



7

Measure panel

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



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

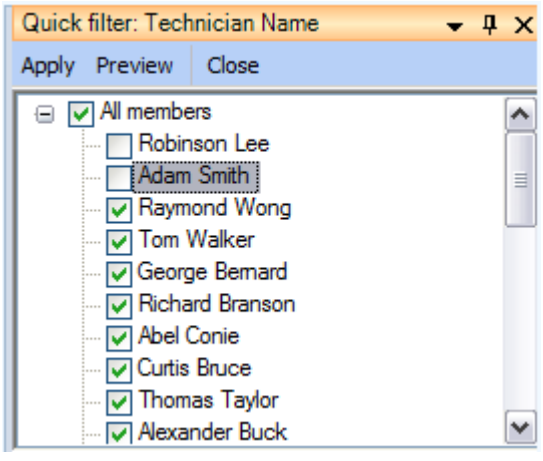
Clicking a mouse button on measures will call the context menu. From here, you can move a measure to one of the pivot panels or to the modifiers axis, or assign a measure filter. Also, you can assign the marker type of a chart point and its color.

8

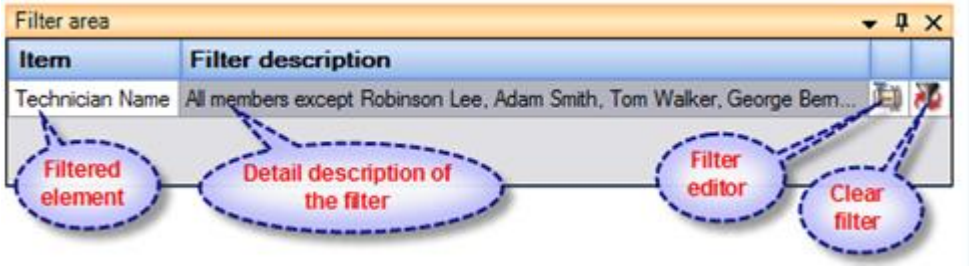
Filter panel

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

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



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



9 **Working Area**

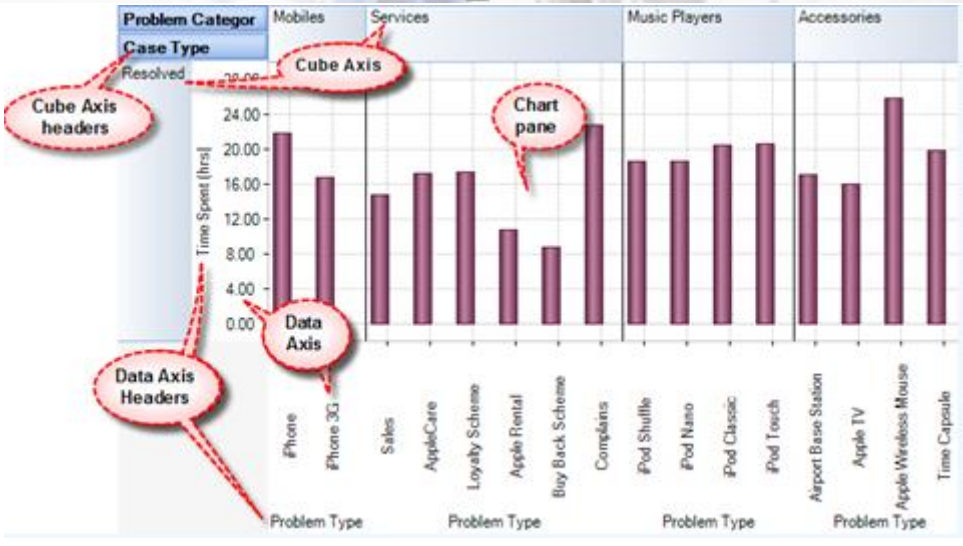
The OLAP-slice data is displayed in working area. In its upper part there is a menu for the quick access to the frequently used commands[2]. The rest is occupied by the current OLAP-slice and consists of the following parts - Cube Axis headers, Cube Axes, Data Axes, Data Axis headers, Chart Panes.

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

Grid working area

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

Chart working area


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

7.2 Working with the OLAP grid

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

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

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

Operating the OLAP-slice

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

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

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

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

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

Mouse Action	*Component Action*
Scrolling the mouse wheel	Vertical scrolling of the table

Scrolling the mouse wheel with the Shift button held down	Horizontal scrolling of the table

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

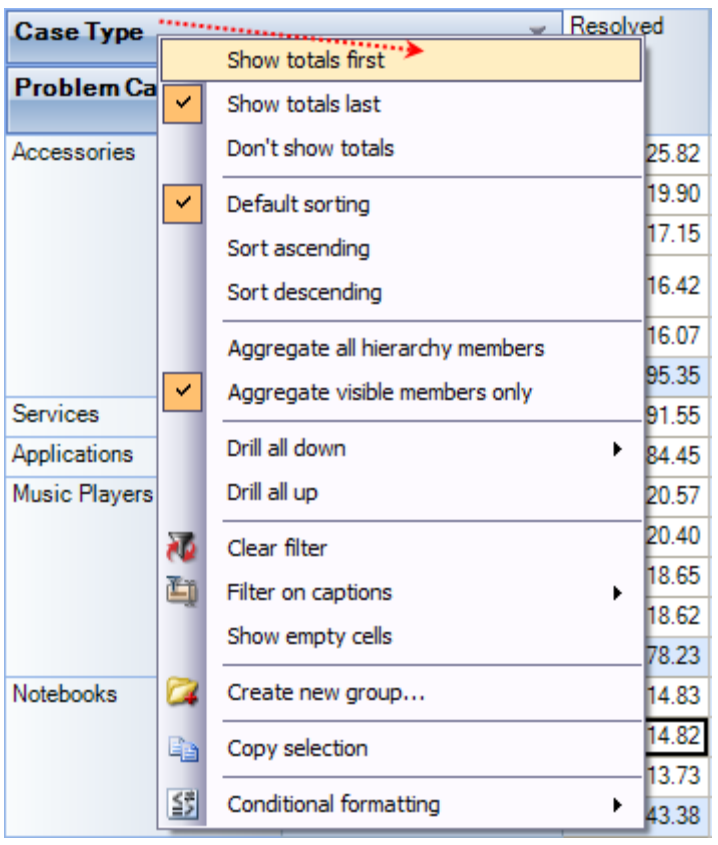
- Select all the cells pressing Ctrl+A;
- Capture the area with the mouse;
- Change the boundaries of the selected area with direction buttons, holding down the Shift button.

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

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

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

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

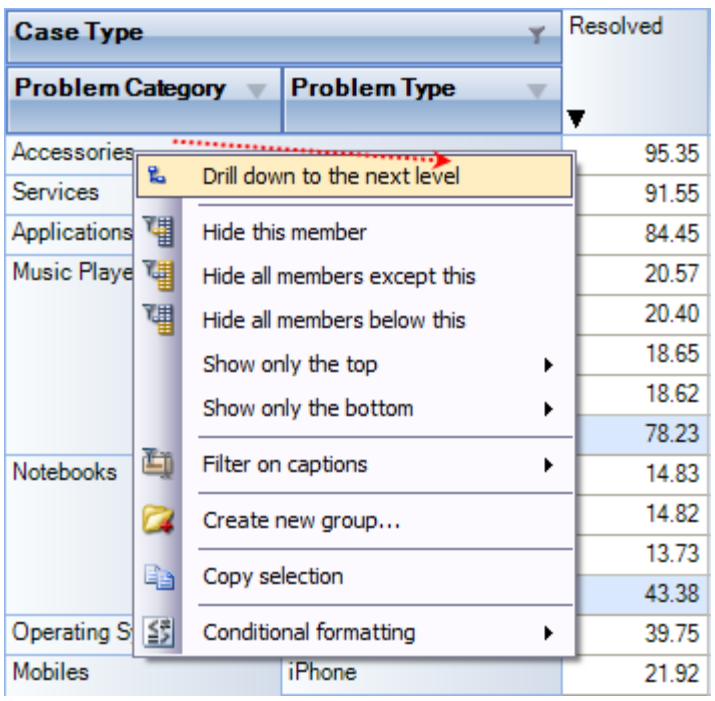


Hierarchy levels' menu

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

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

Hierarchy members' menu

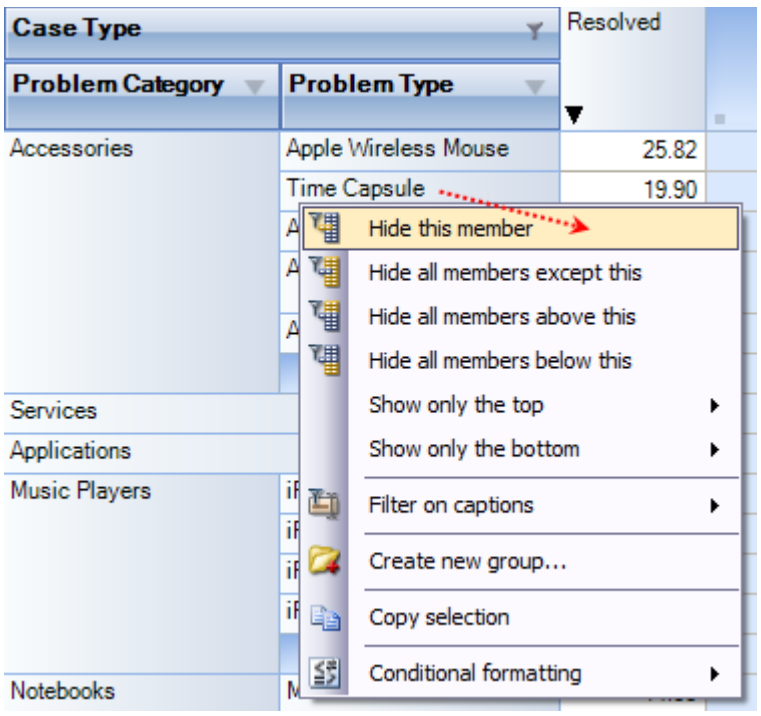


The view of the context menu of the hierarchy members' area

Command	*Function*
Drill down to the next hierarchy	Open the node up to the next hierarchy in the current area, ignoring all the lower levels of the current hierarchy

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

The menu for groups of hierarchy members

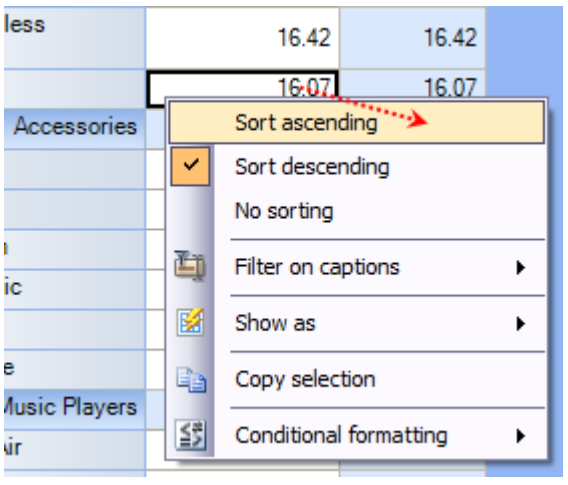


The context menu that appears above the group cell.

Command	*Function*
Hide this member	Hide the selected member
Hide all members except this	Hide all the hierarchy members except the selected one
Hide all members above this	Hide all the hierarchy members above the selected one

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

Measure values' menu



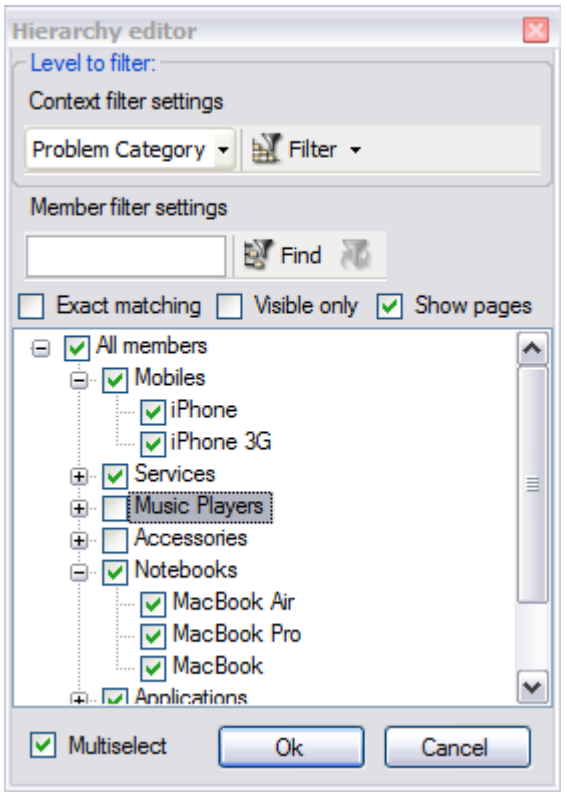
The context menu that appears above the group cell:

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

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

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

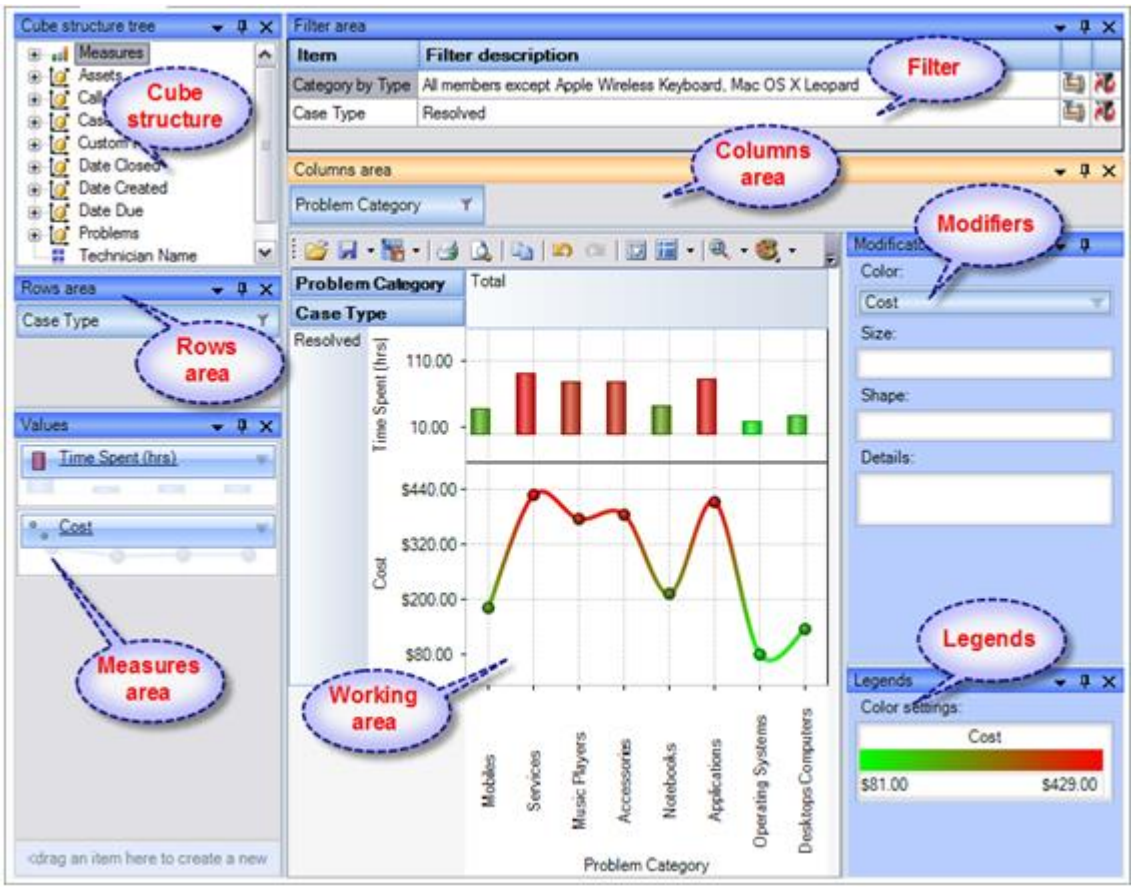
The buttons for launching the editor ( ) are placed on the panels in the Hierarchy levels' area. If the button looks like this ( ), it means the hierarchy had hidden members inside. Pressing the button starts the Hierarchy editor.



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

7.3 Working with OLAP Chart

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



Tools panel

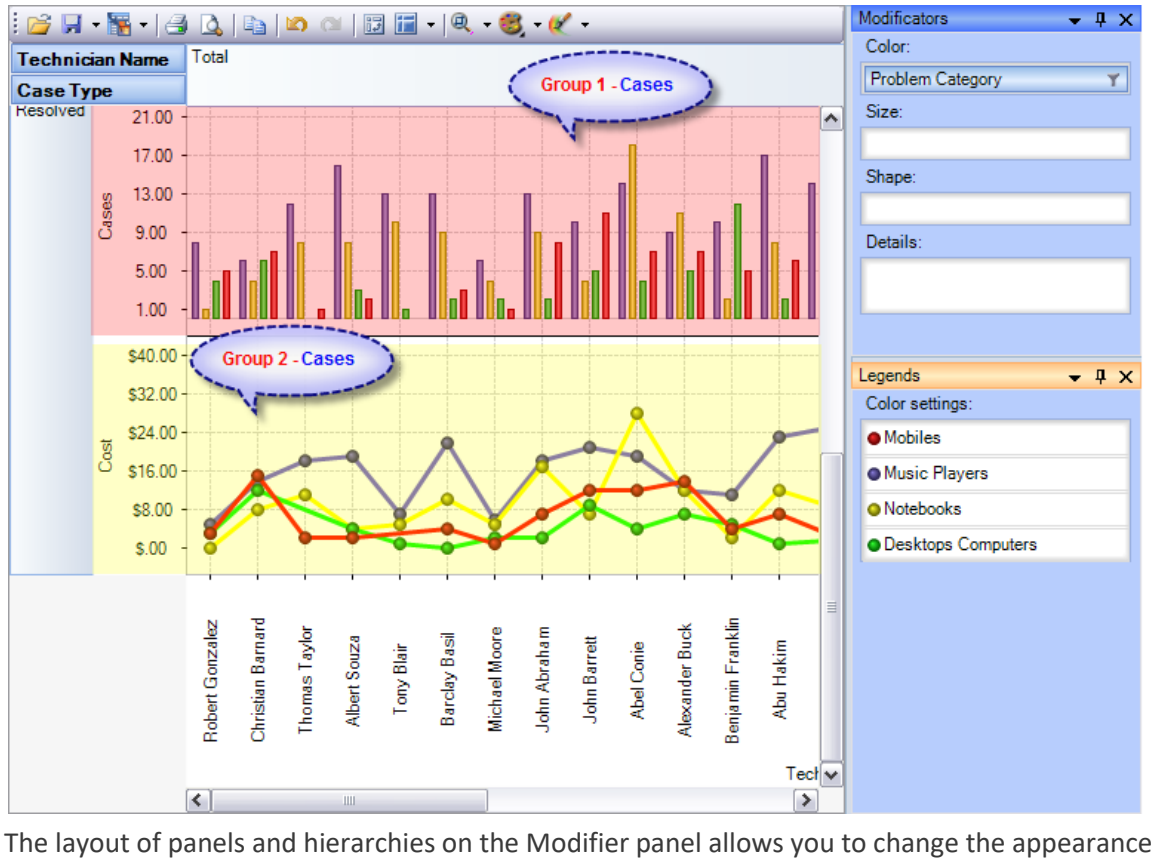
This panel houses all the frequently used operations on the OLAP chart - save, export, print and display options.

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

Modifier panel

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

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



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

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

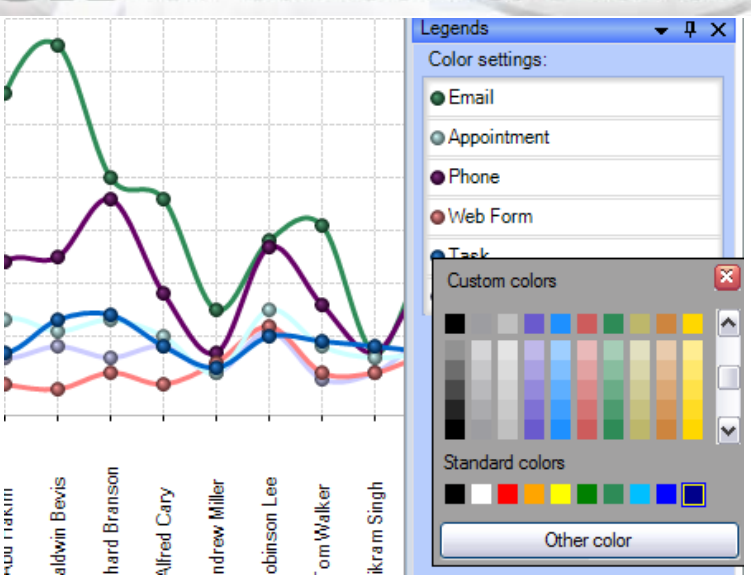
If a measure is placed on the Color pane, its values range is mapped to the given colors range so that it’s tremendously easy to spot the top/low values. If you select the discrete gradient type, you'll be able to set threshold values for filling the Chart elements. While the continuous gradient will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

The Legend panel

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

Setting the Color legend

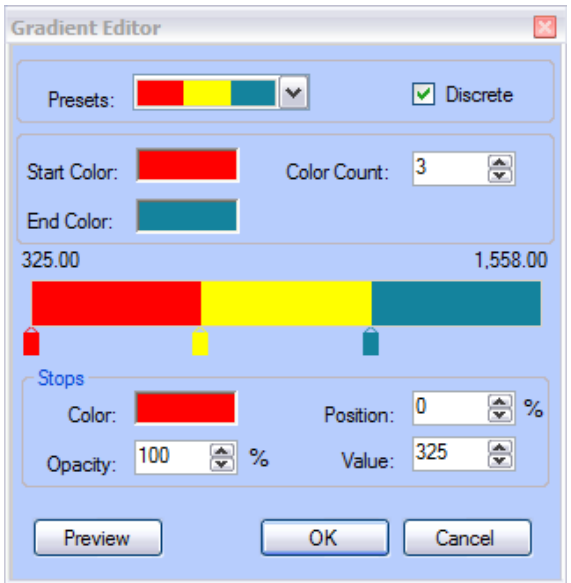
To select a color, simply double-click the appropriate element and choose a color from the pop-up editor.

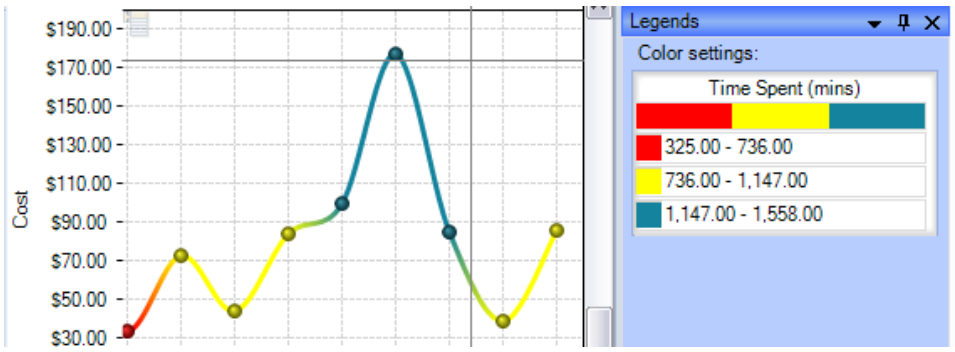


Setting the Gradient legend

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

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





Selecting threshold color option.

Setting the Shape legend

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

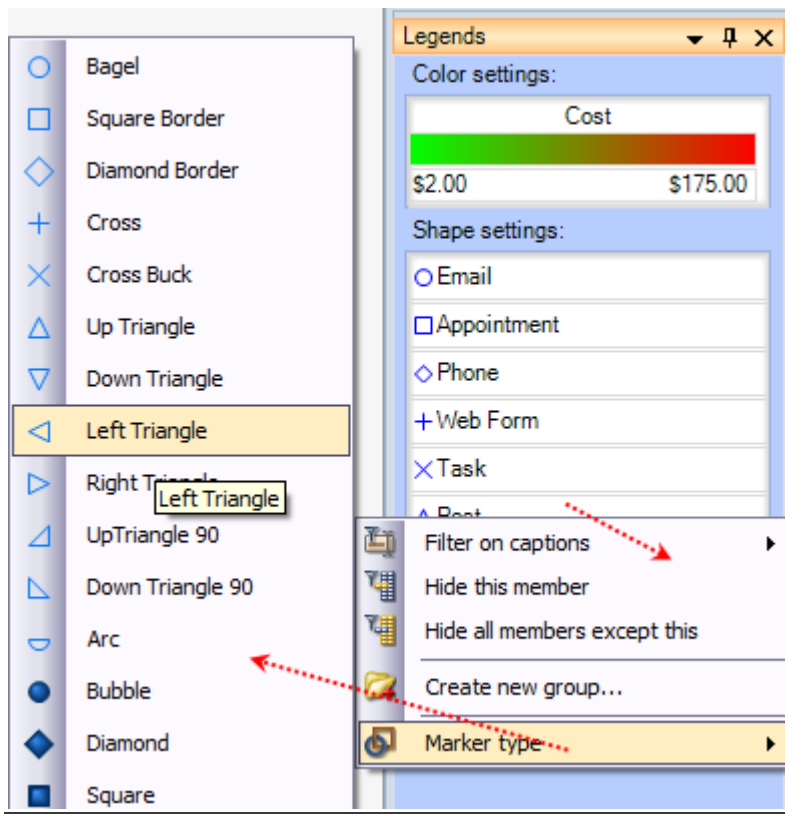
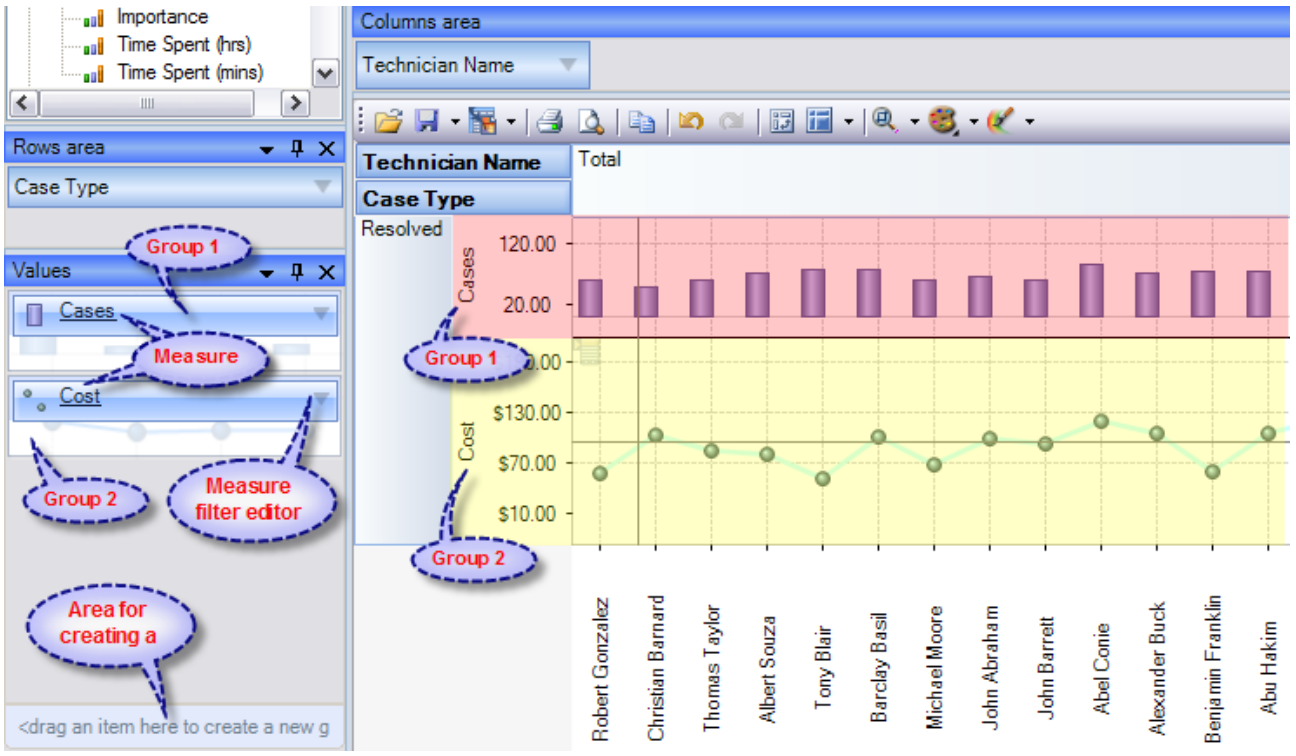


Chart Panes

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



Measure groups with corresponding Charts in the working area

Chart Type

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

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

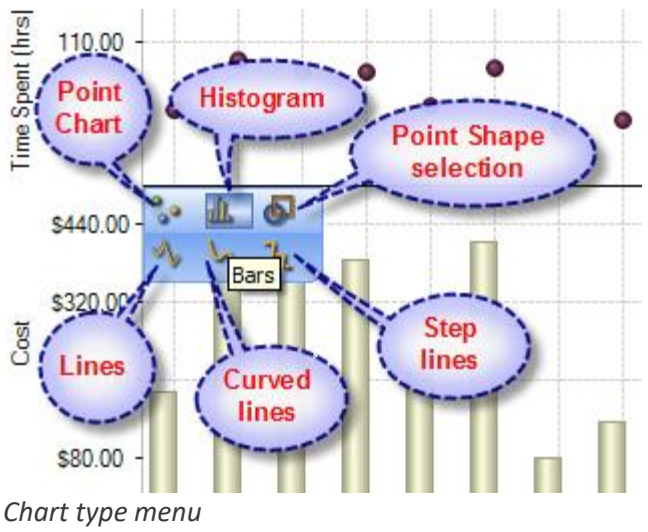


Chart type menu

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

Navigation

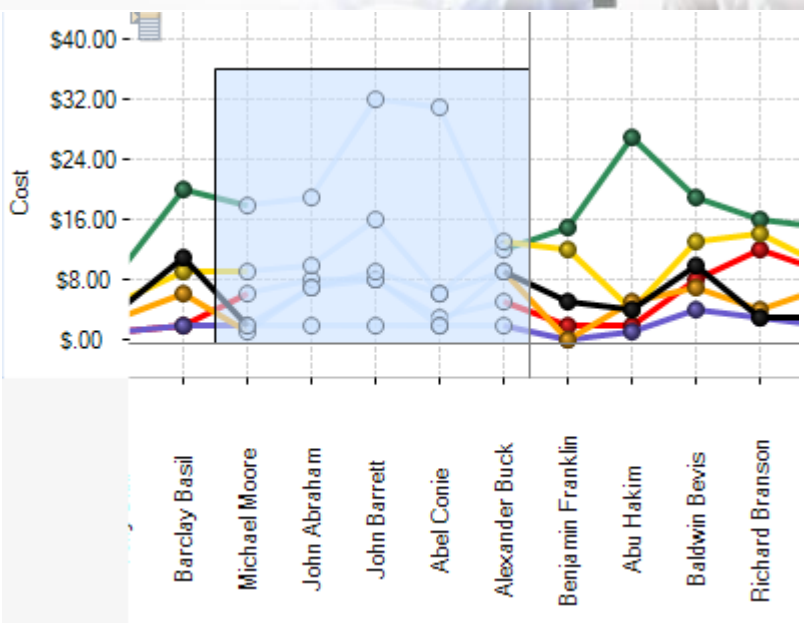
If the content of the Grid exceeds the client area, the scroll bars will appear. You can scroll down the data using the mouse wheel. To scroll the Grid in the vertical direction, turn the mouse wheel, while holding Shift.

Selecting Data

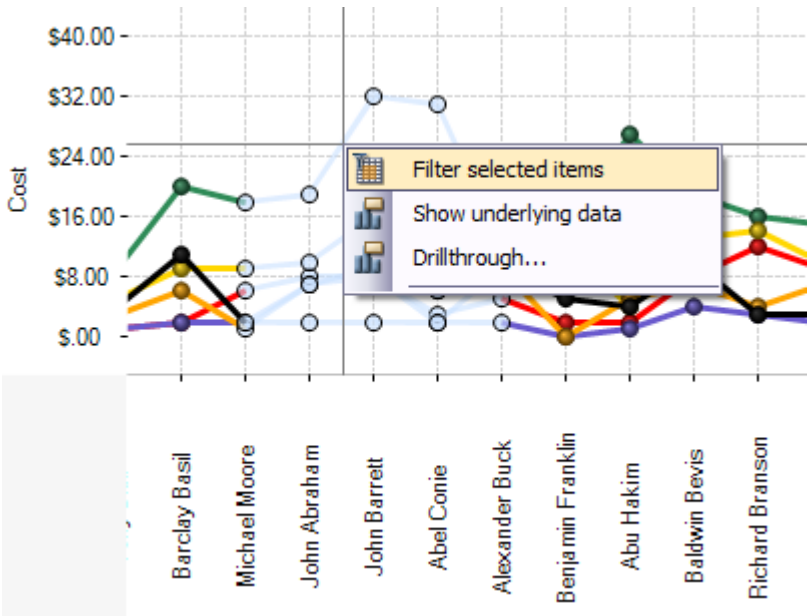
You can select Chart points with the standard Windows' method. Holding down the Ctrl button, you can add selected points, holding down the Shift button, you can select the horizontal range. You can filter the Grid's points while selecting. In that case, the corresponding hierarchy members will be filtered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

Selecting and filtering parts of Charts

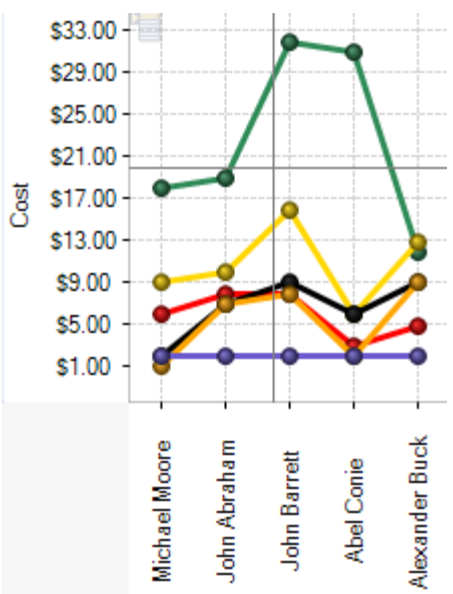
a. Selecting some of the Chart points



b. Selecting the Filter command



c. The result



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

Filtering hierarchies

In case you need to collect data not from the whole Grid, but just from a part of it, the component has a few functions at your disposal: they let you select or remove elements from the slice. Also, there is a standard option of exporting data into a number of formats and printing out the content of OLAP-slices. The simplest way of selecting data is through the context menu. When you click a hierarchy member on the Cube axis, there is a set of commands for quick operations with members:

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

Filter on hierarchy level

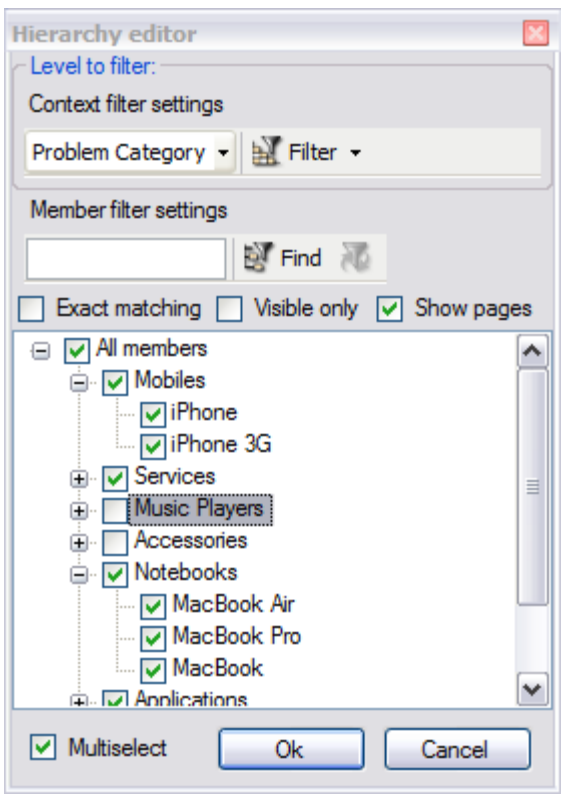
The Filter area of the Editor becomes visible only in case if filtering by hierarchy levels is available. To apply a filter to hierarchy members, you need to select a hierarchy level (if there's more than one) and assign the Filter condition in the Filter menu. In the same menu, there's a command to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

Filtering hierarchy members

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

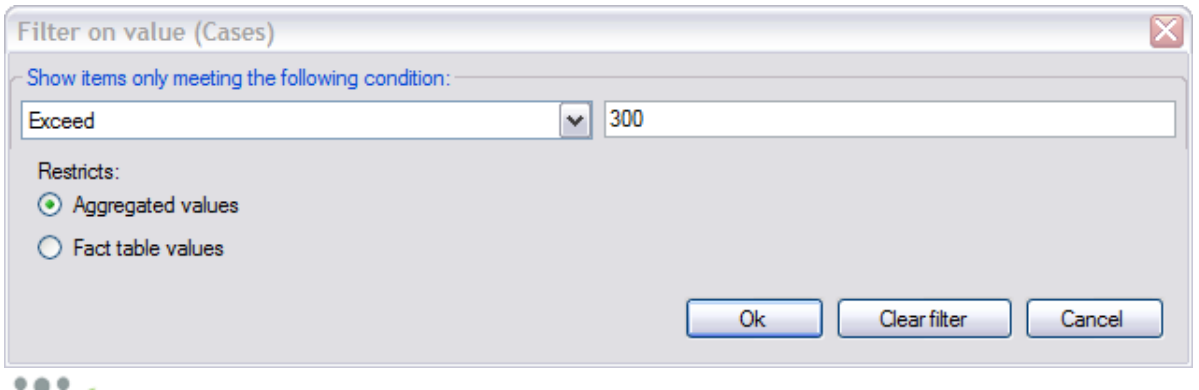
Filtering a single member of a hierarchy

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



Filtering measures

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



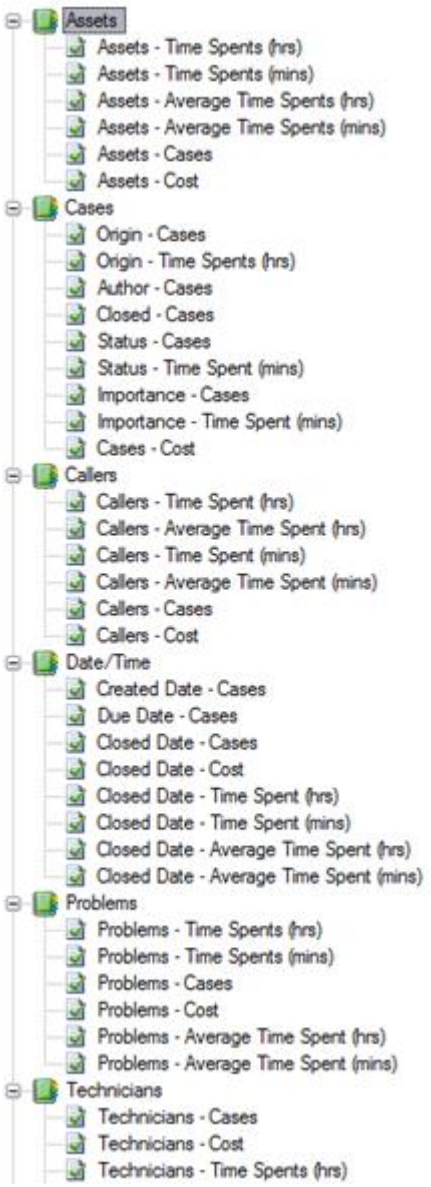
7.4 Predefined Reports

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

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

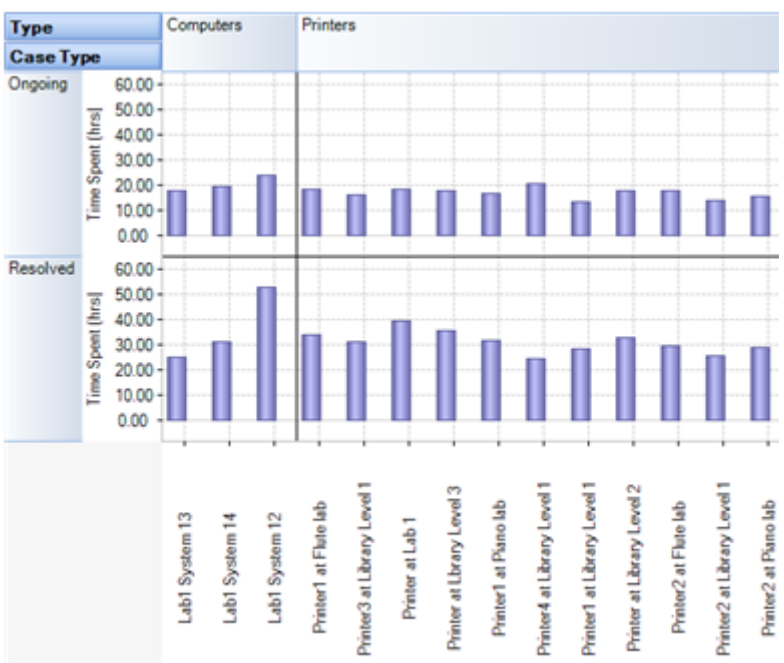
- Reports by Assets
- Reports by Cases
- Reports by Callers
- Reports by Date/Time
- Reports by Problems
- Reports by technicians

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

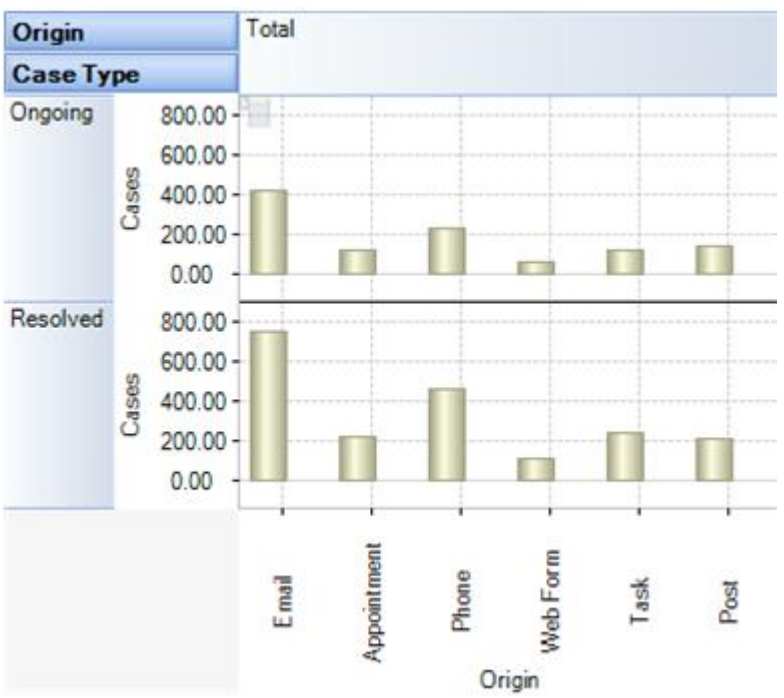


Some sample OLAP charts of the predefined reports

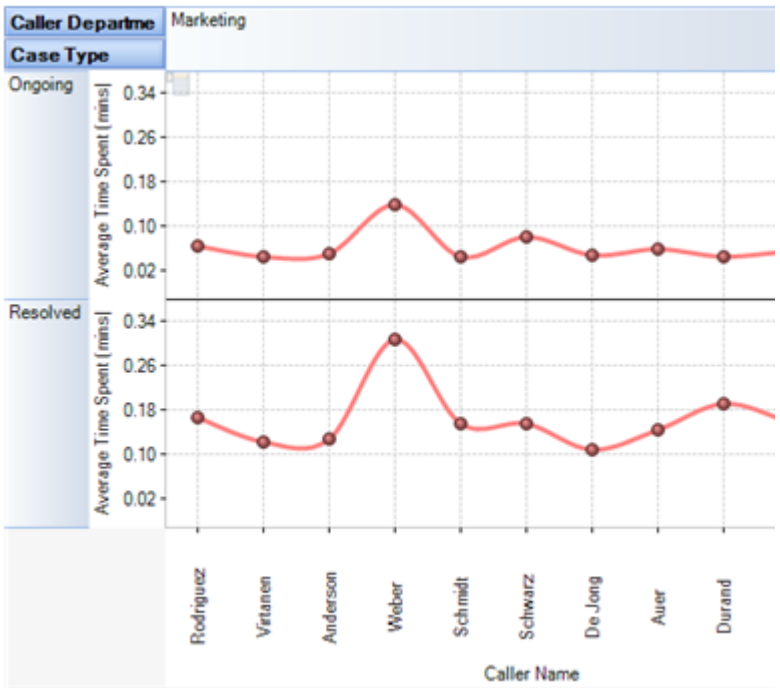
A) Time spent on Asset



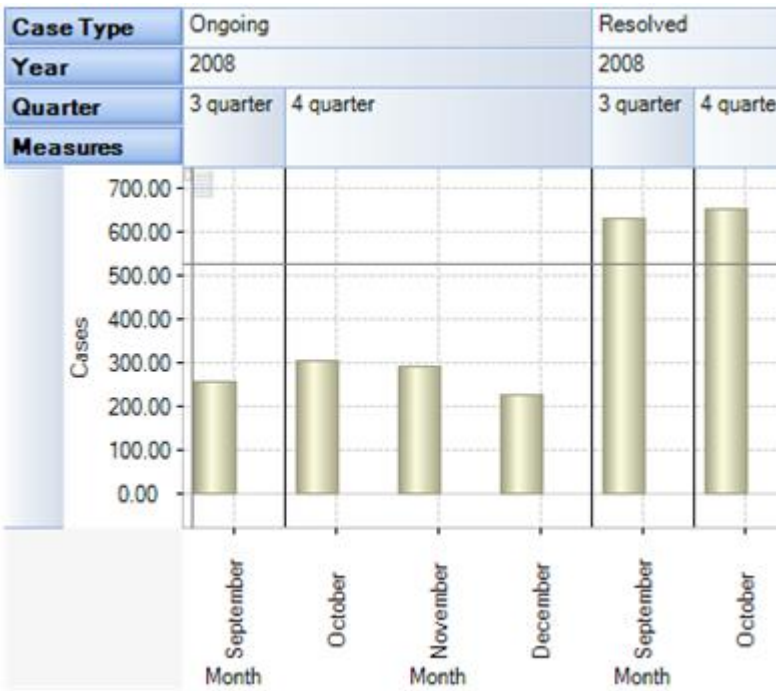
B) Cases Count by Origin



C) Average time spent on caller

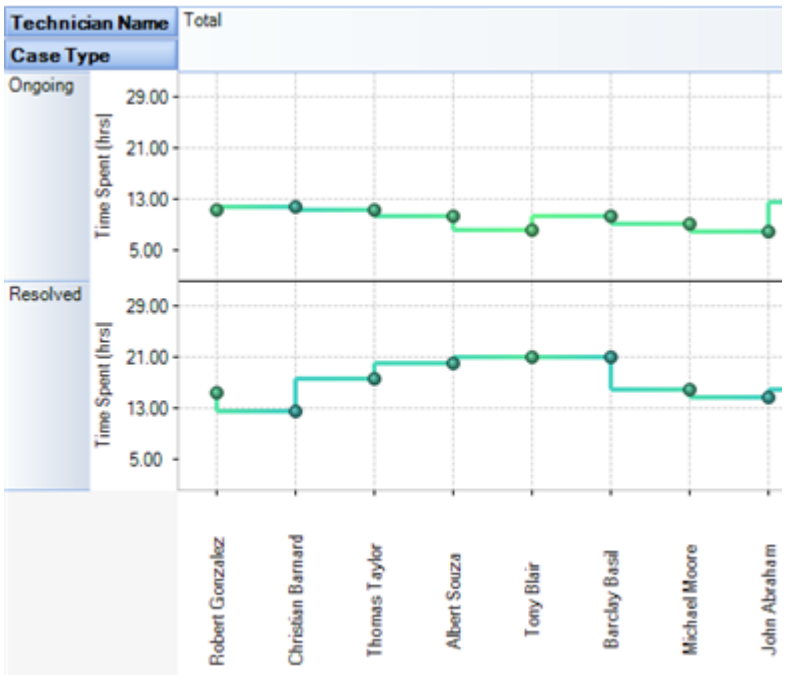


D) Due date



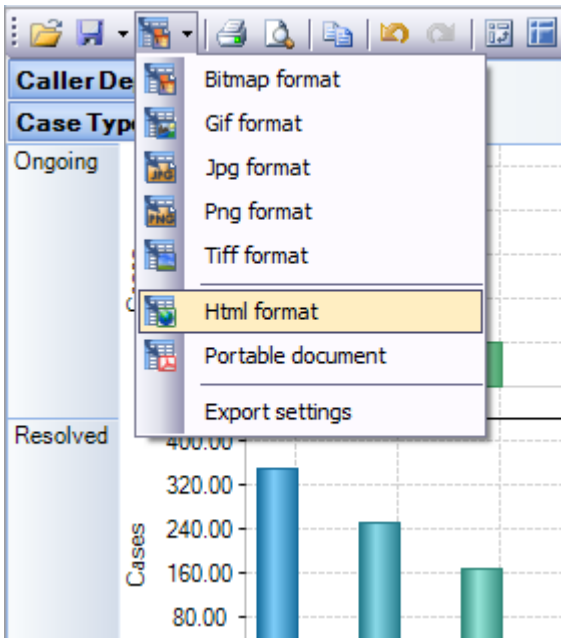
E) Cost per problem category

F) Time spent by technician

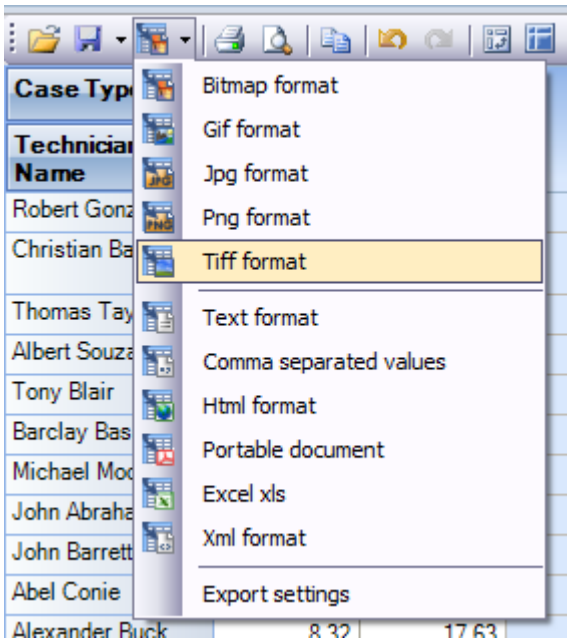


7.4 Printing, exporting statistical data and charts

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



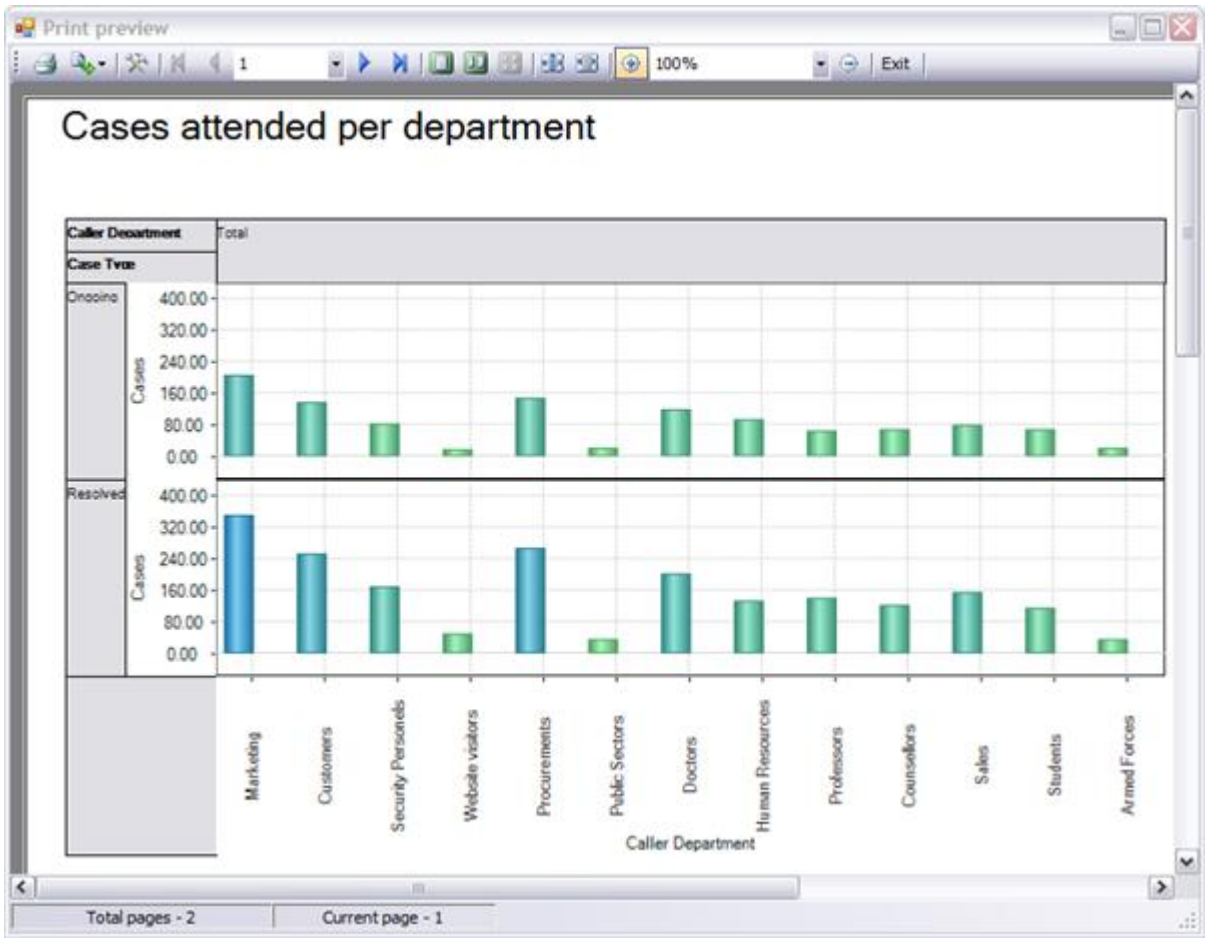
Available export formats in Chart View



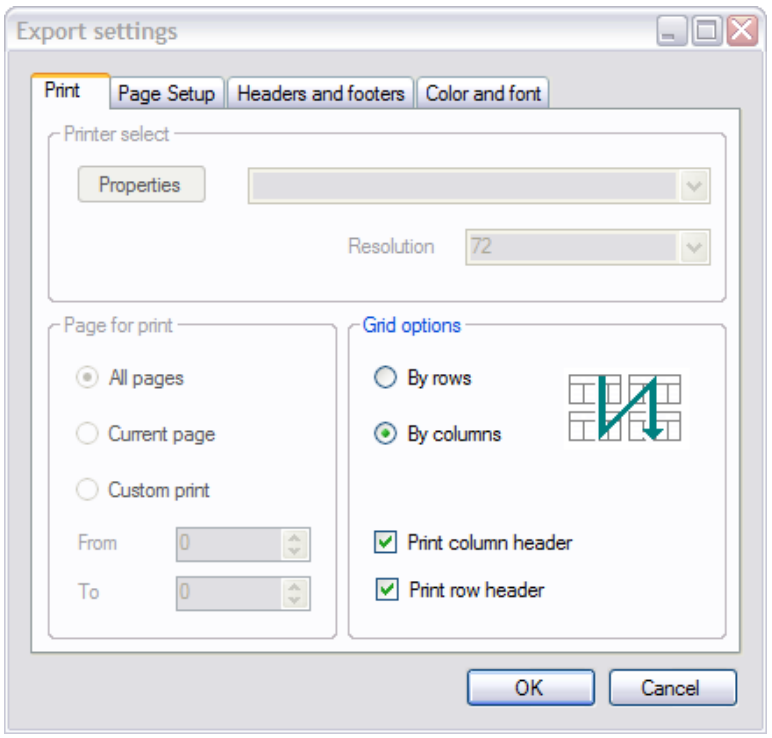
Available export formats in Grid View

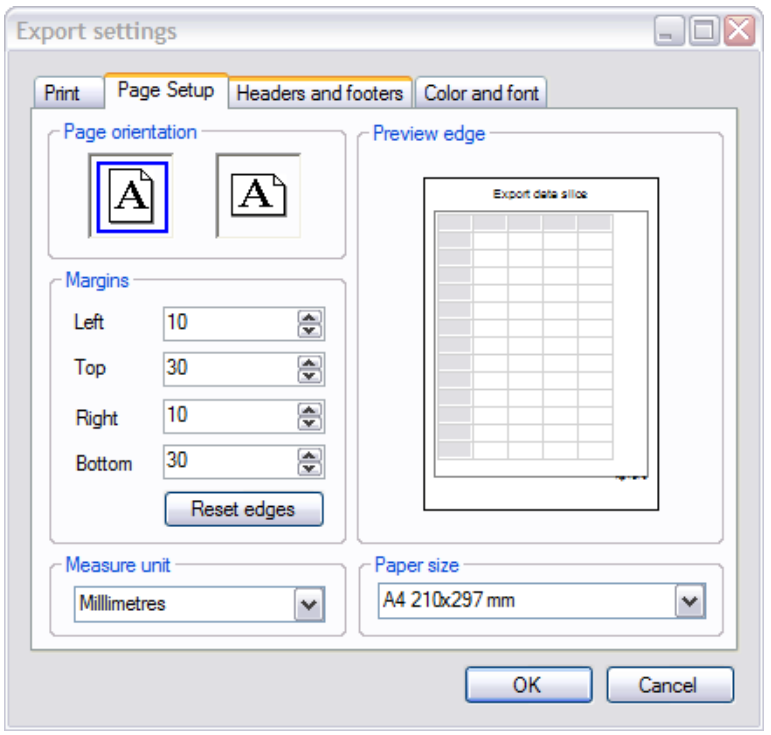
Printing

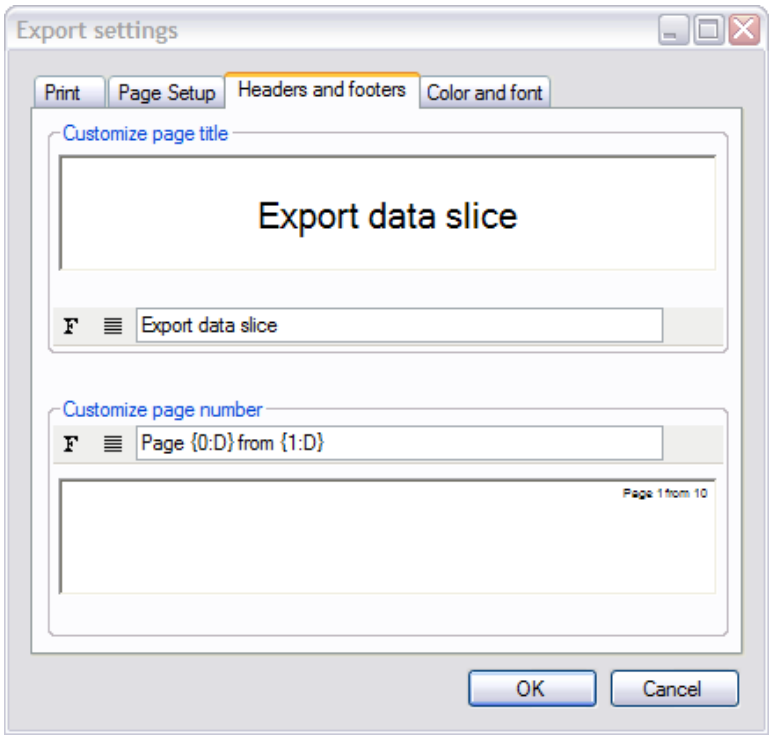
You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

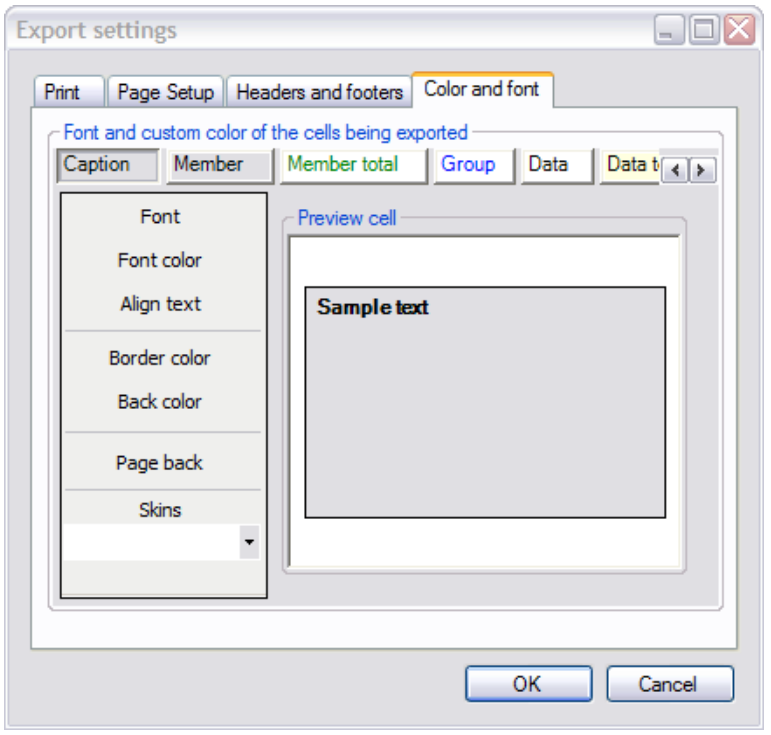


Export Settings -This tool allows you to customize the appearance of the reports to be printed or saved to a file format. You can specify the page size, orientation, headers & footers and color of the fonts and page background.


Export settings
Print
Page Setup
Headers and footers
Color and font
Printer select
Properties
Resolution
72
Page for print
All pages
Current page
Custom print
From
0
To
0
Grid options
By rows
By columns
Print column header
Print row header
OK
Cancel

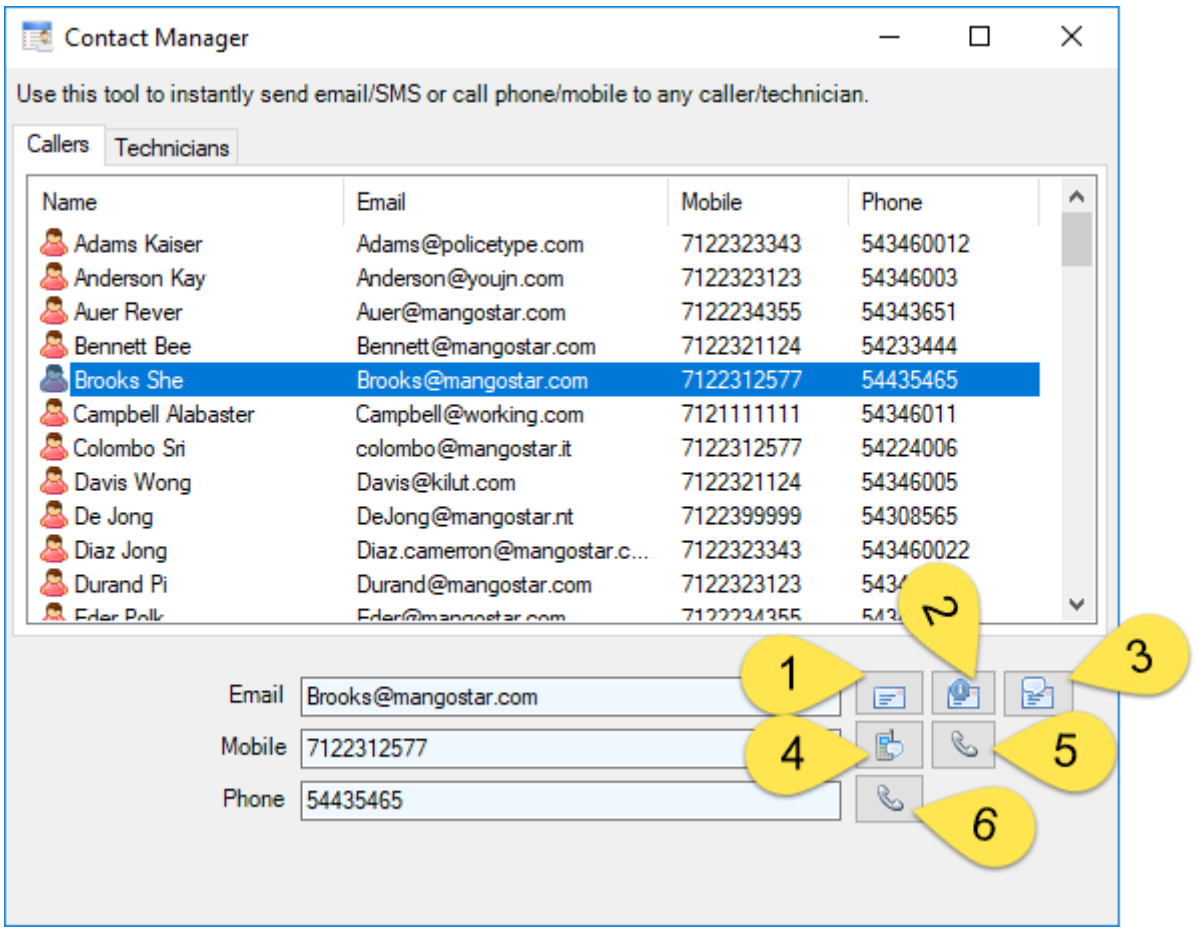

Export settings
Print
Page Setup
Headers and footers
Color and font
Page orientation
Preview edge
Export data slice
Margins
Left
10
Top
30
Right
10
Bottom
30
Reset edges
Measure unit
Milllimetres
Paper size
A4 210x297 mm
OK
Cancel


Export settings
Print
Page Setup
Headers and footers
Color and font
Customize page title
Export data slice
Export data slice
Customize page number
Page {0:D} from {1:D}
Page 1 from 10
OK
Cancel


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

8. Contact Manager

The Contact Manager is a consolidated view of all available contacts in the caller and technician lists, listing the email address, mobile and phone numbers. A quick correspondence can be initiated to a particular contact in a single click via email, SMS or phone call.



1 **Compose an email** with the contact email address already populated in a new email inspector window.

2 Allows you to **choose a knowledge base article and then insert it on a new email** with the contact email address already populated.

3 Allows you to **choose a FAQ answer and then insert it on a new email** with the contact email address already populated.

4 **Compose a SMS message** to send it to the mobile number of the contact.

5 Make a call (either Skype or attached phone) directly to the mobile number of the contact.

6 Make a call (either Skype of attached phone) directly to the telephone number of the contact.

9. Archive Cases

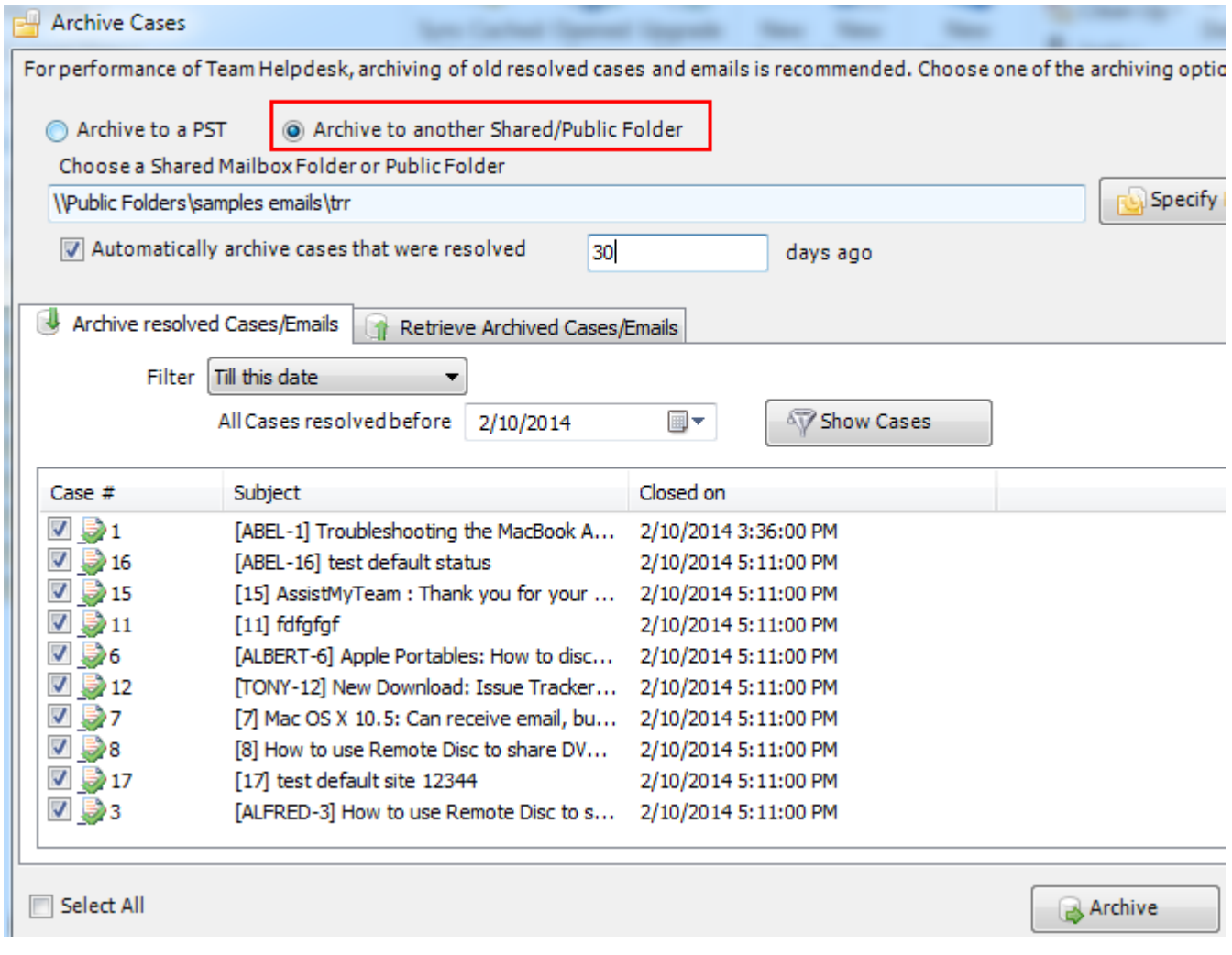
Over time, as the number of cases and emails in Team Helpdesk folders build up, the size of the folders and mailbox increases too. And one pitfall with Outlook having folders/mailboxes with thousands of case items/emails is the sluggish performance you will perceive in its normal operation.

For instance, if the resolved cases contain thousands of old cases, and assuming there are other thousands of associated emails in the Team Helpdesk History folders, when you try to open an existing case, it may take longer to load and show the form and the fields. This is because Team Helpdesk scans your resolved cases folder for those cases that are related to the opened case (in terms of the caller, asset or company). And this scanning process will take time if you have thousands of cases and emails in the Team Helpdesk folders. Therefore, archiving old cases (say older than 30 days) and their associated emails out of Team Helpdesk folders (i.e., *to a PST or another mailbox or public folder)* would greatly help reduce the scanning/probing time thereby increasing responsiveness and performance of Outlook and Team Helpdesk.

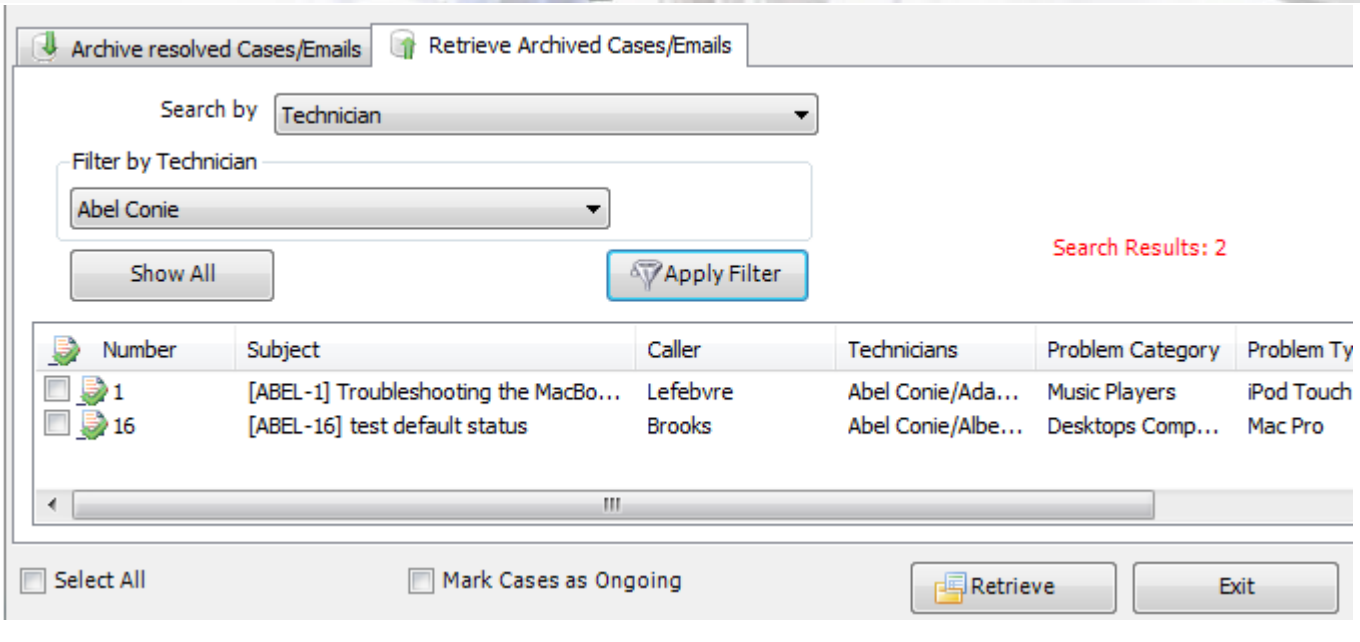
Two modes of archiving old, resolved cases are supported:

a) **Archive cases to a PST**

b) **Archive cases to another Shared mailbox or Public folder**.
This is the recommended way of archiving as it overcomes the limitation with using a PST data file (which is, PST file can't be accessed and opened simultaneously by more than one person in their Outlook even if the PST file is shared on a network folder). Further, with this technique, the archived cases are searchable from Team Helpdesk and could be included in Summary Reports and OLAP Statistics too. And when a reply to an archived case is received, Team Helpdesk would automatically add that email to that case and re-opens it (i.e., *the case would be un-archived and moved to the Ongoing Cases automatically*). Moreover, only on this option, you can enable the auto archiving feature where the Team Helpdesk Manager add-in would scan for old resolved cases and their emails for archiving. You can define the number of days old/resolved cases that are to be kept in the *Team Helpdesk > Resolved Cases* folder before they are moved to the archived folder.



In both options, emails associated with the cases are also archived. At any time, you can retrieve back the archived cases from the 'Retrieve archived cases/emails' (second) tab. You can either display all the archived cases or apply a filter search using keywords or by technicians or problems. And choose those particular cases that you want to retrieve back to the resolved cases (or re-open them to the Ongoing Cases folder).

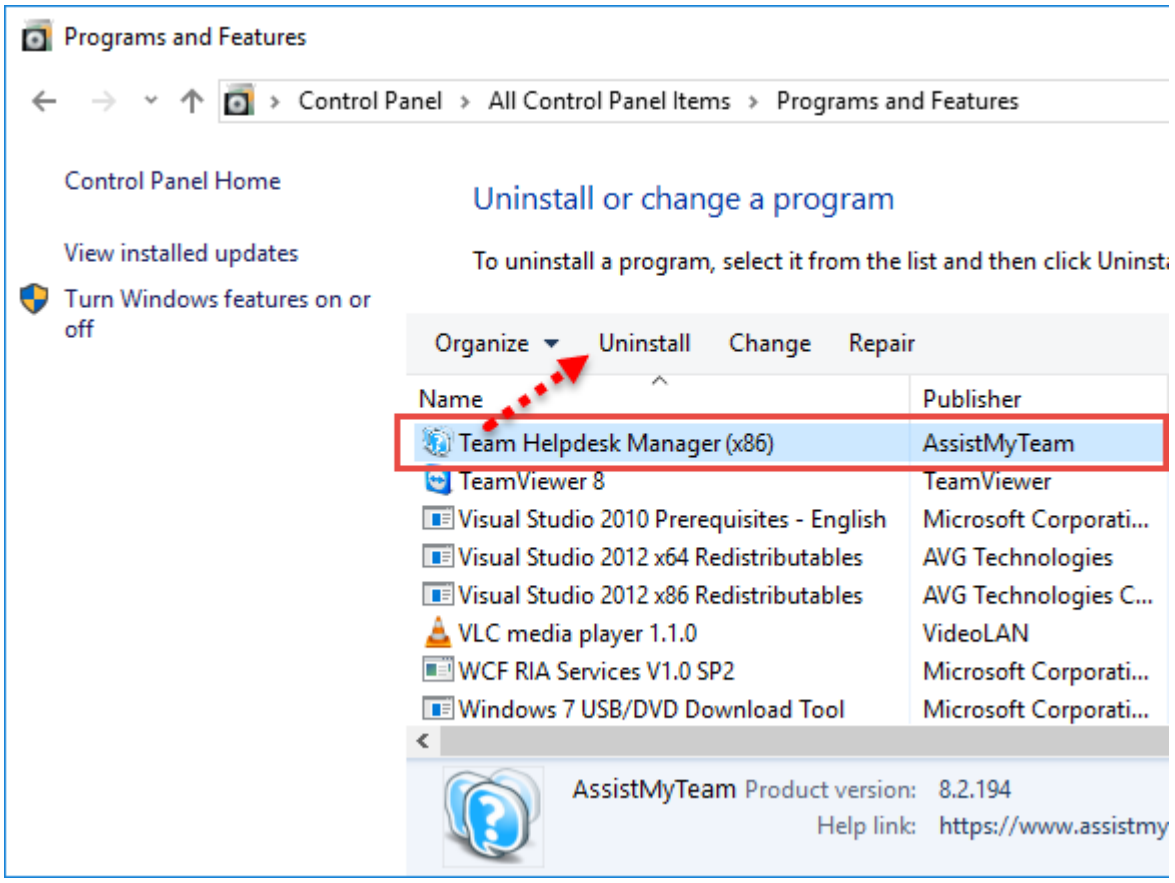


AssistMyTeam

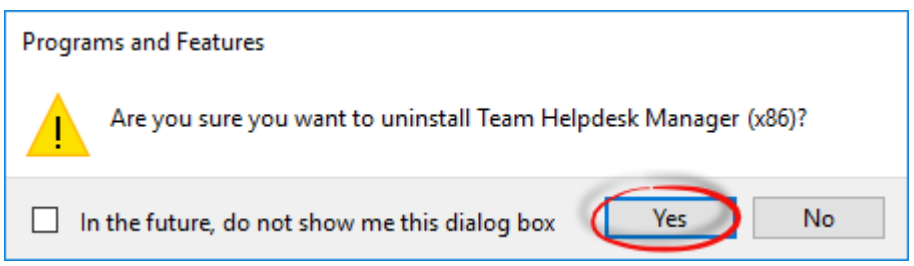
10. Uninstalling Team Helpdesk Manager SP add-in

To uninstall the Team Helpdesk Manager SP add-in from your computer, follow the steps outlined below:

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



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



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

Step 4: After the add-in uninstallation is successful, you can start Outlook and delete the '**Team Helpdesk SP**' folder that was created under your Exchange mailbox or Public Folder.

11. Important links

Team Helpdesk for Outlook and SharePoint - Home page
Go to the official website of Team Helpdesk for Outlook and SharePoint.

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

Purchase License
Purchase an enterprise team license for Team Helpdesk for Outlook and SharePoint.

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

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

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