Issue Tracker (Personal Edition)
For Outlook & SharePoint

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

Help Manual

Revision 2.3
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1. Introduction

Issue Tracker system leverages two of your existing investments in Microsoft – Outlook and SharePoint to provide you with an easy way to collect ticket data from emails, assign technicians and problem areas, set due date and other custom metadata. And generate trouble tickets in one of the defined SharePoint lists, where it can be tracked and collaborated with other technicians and stakeholders. And because of your familiarity with Microsoft Outlook and SharePoint, it requires no special training or skill sets.

Highlights

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

*Issue Tracker system* is available right inside your Outlook as an add-in process. Please make sure that your system meets the following requirements before installing *Issue Tracker for Outlook and SharePoint*:

**Requirements**

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlook Version</td>
<td>Outlook 2010 (32 bit only), Outlook 2007 or Outlook 2003 (SP2 or above). Issue Tracker operates directly inside the Microsoft Outlook application (using Microsoft’s “COM add-in” technology). Outlook Express is not supported.</td>
</tr>
<tr>
<td>SharePoint Version</td>
<td>WSS 2.0, 3.0, 4.0 (SharePoint 2010), MOSS 2007, 2010. Cloud based SharePoints are also supported.</td>
</tr>
<tr>
<td>Others</td>
<td>Microsoft .NET Framework 2.0</td>
</tr>
</tbody>
</table>
3. Purpose

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

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

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

Step by step procedure is given below:

Step 1. Run the IssueTrackerPersonalSetup.exe to start the installation. Click Next to Continue. If Outlook 2003 (SP2 or above) or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.

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

Step 3. Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process
Step 4. Click 'Finish' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.
5.1 Raise a trouble ticket in a SharePoint list

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

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

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

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

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

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

Once a trouble ticket is generated successfully in the chosen SharePoint list, information regarding the ticket, such as the ticket ID, data/time and the URL to the SharePoint ticket are tagged and embedded into the email item in Outlook. This provides an easy way to go to the ticket item in the SharePoint site directly.

**Screenshot:** After a ticket is created, the mail item is tagged with information on the trouble ticket such as Ticket ID and URL.
In the SharePoint ticket item, most of the fields are populated with the metadata information extracted from the Outlook mail item. For example, the caller contacts detail, the problem description, subject, attachments, formatting and style, inline images and links are retained in the ticket. Also notice that, further information fed by the you in Outlook, such as the responsible technician, due date, problem category, type and status and other custom fields’ data are also available in this ticket.

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

- The caller contacts, problem category, type and status are collected from the Outlook email in this SharePoint trouble ticket.
- Attachments are uploaded automatically to SharePoint, and can be easily accessed from these links.
- HTML formatting and inline images are retained in the SharePoint ticket too.
- Automated notification email sent to caller.

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5.2. Escalating and updating email conversations to trouble ticket

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

![Screenshot: Tracking tag and code are automatically embedded into the original email](image1)

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

![Screenshot: The tracking code remains intact in the subject of the outgoing email, thus allowing for automatic tracking and update of ticket](image2)

This means, the ticket item and description field will be updated live automatically, as and when the email is sent out or received. This greatly enhances the productivity of the helpdesk because, you are not required anymore to monitor the mailbox for new replies from caller, nor there is need to add and update the new information to the relevant ticket manually. Issue Tracker system automatically does that for you.
Screenshot: The SharePoint ticket item is updated when any email response is sent out from the helpdesk, or received to the helpdesk.

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

Automated notification email sent to caller

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

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

When the caller replies back to the helpdesk, the ticket information is automatically updated again.
5.3. Adding a new email to an existing ticket

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

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

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

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

All the ticket items available under the selected SharePoint list will be shown in the list view. The first column shows the Ticket ID and the second shows the subject of the ticket. You just need to select the particular ticket ID to which the selected emails from Outlook would be added and associated to the ticket.
This is how the chosen ticket item is updated with the contents of the email. Notice that, the actual Outlook email item is also added as an attachment in MSG format. What it means is, you can just click this attachment link to open the particular email in Outlook, in its original state.

Title: Problem sending email from my Outlook Client! Please Help.
Assigned To: bytopadymonics
Issue Status: Normal
Description:

Hello!
I was not aware this can be done, so, if one of the agents did it might have been by mistake.
If such situation happens, can I do something to link back the email in History to its case?

Best regards,
Robert

New Attachments: 7232010 11:31 AM - RE- strange behavior.msg

The MSG format of the newly added email available as attachment
5.4. Un-tag and reset a processed email item in Outlook

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

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

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

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

To configure the Automatic Publishing feature, go to ‘Settings’ menu, and click ‘Tickets Automation’ option.

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

![Email Monitoring and Live Publishing](image)

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

You can also associate a default value for fields such as Problem Category, Problem Type, Status and Technician to a monitored folder or mailbox, such that trouble tickets generated from the particular mailbox or folder, will have those associated values, automatically assigned. As a consequence of this dynamic assignment, Issue Tracker will send out notification emails, to the assigned technician automatically.

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

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

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

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

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

View 1 – Mails with SharePoint Ticket ID
This a table view, where the Outlook mail items are arranged by the unique ticket item ‘ID’ of the SharePoint Ticket item in descending order. The SharePoint List Name and Site Name are also available in the view.

View 2 – Mails grouped by SharePoint Ticket list
This is a table view, where all the Outlook mail items are grouped by the SharePoint Ticket List name. Along with the list name, you will see the sub total number of items in that group under the bracket.
### View 3 – Mails grouped by SharePoint Ticket Site
This is a table view where the Outlook items are grouped by the SharePoint Ticket site URL.

<table>
<thead>
<tr>
<th>ID</th>
<th>From</th>
<th>Subject</th>
<th>List Name</th>
<th>Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>60</td>
<td>Lisa Bub</td>
<td>Submit Button &amp; TWA Issues</td>
<td>Mails</td>
<td>Sat 2/12/2011 6:28 AM</td>
</tr>
<tr>
<td>55</td>
<td>Becca</td>
<td>I broke it.</td>
<td>Issue Tracking</td>
<td>Sat 2/12/2011 3:56 AM</td>
</tr>
<tr>
<td>54</td>
<td>Hanke-Gylling, T...</td>
<td>AW Question Team Helpdesk for Outlook</td>
<td>Issue Tracking</td>
<td>Fri 2/11/2011 8:02 PM</td>
</tr>
<tr>
<td>53</td>
<td>Bob Clift</td>
<td>Attachment Manager</td>
<td>Issue Tracking</td>
<td>Wed 7/28/2010 8:16 PM</td>
</tr>
</tbody>
</table>

### View 4 – Mails grouped by SharePoint Ticket Site and List
This is a table view, where all the Outlook items are first grouped by the SharePoint Ticket Site URL, and then further sub-grouped by the SharePoint Ticket List name. This gives you a hierarchy tree representation of all Outlook organized and summarized in a better way.

<table>
<thead>
<tr>
<th>ID</th>
<th>From</th>
<th>Subject</th>
<th>List Name</th>
<th>Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Sharon Elmes</td>
<td>Invoice Details Required</td>
<td>Sales 2011</td>
<td>Thu 7/27/2010 2:07 PM</td>
</tr>
<tr>
<td>4</td>
<td>Ben Nel</td>
<td>RE: Outlook database exporter</td>
<td>Sales 2011</td>
<td>Mon 7/26/2010 4:57 PM</td>
</tr>
<tr>
<td>3</td>
<td>Andrew Wheelhouse</td>
<td>Screen shot</td>
<td>Sales 2011</td>
<td>Thu 7/6/2010 11:55 PM</td>
</tr>
<tr>
<td>2</td>
<td><a href="mailto:info@assistmyteam.net">info@assistmyteam.net</a></td>
<td>New Enquiry Submitted from Contact Page</td>
<td>Sales 2011</td>
<td>Tue 6/29/2010 10:18 PM</td>
</tr>
<tr>
<td>3</td>
<td>Lynn Nuckols</td>
<td>Document Exporter</td>
<td>Tasks</td>
<td>Fri 6/25/2010 1:58 AM</td>
</tr>
<tr>
<td>2</td>
<td>Dan Tang</td>
<td>Fw: New Support Request: SupportCalls ...</td>
<td>Tasks</td>
<td>Wed 6/23/2010 11:54 PM</td>
</tr>
<tr>
<td>1</td>
<td>Upload.com</td>
<td>How will you get ahead?</td>
<td>Tasks</td>
<td>Wed 6/23/2010 5:00 AM</td>
</tr>
</tbody>
</table>
5.7. Personal Preferences

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

You can invoke the Personal Preferences panel from Settings menu > My Preferences

5.7.1 Hide progress dialog shown in SharePoint Upload
By default, this option is disabled. If enabled, the small progress dialog box that pops up in the right-bottom portion of your screen when you raise any trouble tickets from Outlook to SharePoint, will not be shown.

5.7.2 Open the newly generated SharePoint ticket item in a web browser
By default, this option is enabled. When you raise a trouble ticket from Outlook email to SharePoint, it would open the ticket item in your default web browser, letting you view or enter new information pertaining to the ticket.

5.7.3 Assign ‘Self’ as the Technician for newly generated Tickets
Enabling this option will force Issue Tracker add-in in your Outlook to assign yourself to any trouble ticket that is generated from your Outlook.

5.7.4 Default Problem Category of newly generated Ticket
You can specify a particular category of the problem, with which you want to associate to any trouble ticket generated from your Outlook, by default.
5.7.5 Default Problem Type of newly generated Ticket
You can specify a particular type of the problem, with which you want to associate to any trouble ticket generated from your Outlook, by default.

5.7.6 Default Status of newly generated Ticket
You can specify a particular status from among the drop down list, with which you want to associate to any trouble ticket generated from your Outlook, by default.

5.7.7 What do you want to do with the processed mail items:

- **Nothing** – Default Option. This will leave the processed email item intact in its original location.

- **Move to 'Tickets' subfolder within the parent folder** – This will move the processed emails to subfolder ‘Tickets’ under the parent Outlook folder. If this subfolder does not exist, it will be created automatically. This is useful if you want to segregate the processed emails related to trouble tickets from your private and non-helpdesk related emails.

- **Move to the following Outlook folder** – You can also specify your own destination Outlook folder (can be a public folder too), to move the processed emails. If you move the emails to a public folder, you can let other users access to the processed emails.
6.1. Administration: Configure SharePoint Ticket Lists

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

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

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

- To configure a new SharePoint ticket list and perform fields mapping, select ‘Add New Issue Tracking SharePoint List’ option and click ‘Launch Mapping...’ button. You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list.
To re-configure an existing fields mapping, simply select the particular SharePoint list item, and click ‘Launch Mapping…’ button. You can also double-click the SharePoint list to launch the mapping tool.

To remove an existing fields mapping, select the particular list item and click ‘Delete’ button. This will permanently remove the selected mapping settings. NOTE: The SharePoint list associated with this mapping is not deleted; just the reference is removed from the Helpdesk Settings Data Source.

6.1.1 The mapping tool

Through the mapping tool, you can choose which fields from the emails in Outlook are to be extracted and published to the SharePoint ticket list, and perform the mapping between these chosen fields of the emails to that of the SharePoint ticket list. A mapping is nothing but an association between an Outlook field (e.g., subject of the mail item) to a specific SharePoint list field (e.g., Title). You have complete control over which data goes to the SharePoint list from Outlook.

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

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

In the mapping dialog box (above), the first column lists all the email fields as available in Outlook. The second column displays the data type of the field. In the last column, there is a drop down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop down box to map it to the corresponding Outlook field. For example, in the screenshot above, Outlook field ‘SenderName’ is mapped to SharePoint field ‘Caller Name’, and Outlook field ‘HTML Body’ to SharePoint field ‘Description’ etc.

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

- **Required fields** – these are the fields that are mandatory for mapping to a SharePoint list. These fields are shown in light-reddish background.
- **Optional fields** – these are the fields that you can opt to include in the mapping so that the corresponding values from the mail item are also available in the ticket item. These fields are usually the inbuilt fields of the Outlook mail item. These are shown in light-yellow background.
- **Custom list fields** – these are the fields that you or the helpdesk administrator had defined, to add any further information on the problem, case or the caller to a trouble ticket. These appear in green background, and the title always starts with ‘CL_’. *Example ‘CL_Service Level’*

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

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.

### Fields available for mapping to SharePoint list

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

### Mandatory Fields for Mapping

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

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

If any of these mandatory field(s) are not mapped, you will get a ‘mandatory fields not mapped’ warning message and the settings won’t be saved.
6.1.2 Unique Tracking Prefix Code

Each SharePoint list that will collect and store trouble tickets from Outlook requires a unique tracking code. This code is used as a prefix before the ticket ID (e.g., [CMA-4]) and can be alpha-numeric characters of 5 or less.

This tracking code is embedded to the original email from which a ticket was raised, for tracking and escalation purpose on subsequent email conversations that might happen.

As long as this phrase is intact when sending out response to caller, or when caller replies back to the helpdesk, Issue Tracker add-in will automatically track and associate it with the correct SharePoint list and ticket item. It is recommended that you choose a tracking code that is meaningful for easy recognition, such as, TECH for technical support, SALES for sales support, HRD for Human resource development etc.
6.2 Administration: Drop down lists – Problems, Statuses and Custom Fields

To allow adding of extra meaningful information to trouble tickets, apart from the ones extracted from the email, you can compile and maintain a list of problem categories and types, statuses and any number of custom fields drops down values. So that these drop down lists are deployed and available in your Outlook, for tagging new trouble ticket when it is raised from an email.

The problems list, statuses list and customs list can be found under Settings drop menu.
6.2.1 Problems List:

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

**Problem Categories:** Gather all the problem areas that your support team will be attending to and feed them into the 'Category' field.

**Problem Types:** The problem types are sub-category items that fall within the domain of a problem area/category. Hence, each problem category has a specific list of problem types that you can choose from and tag a trouble ticket. When you select 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).

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

As you start working on tickets, over time, you may need to update the state of the problem so in order to track and plan additional resources if needed to resolve that particular case. Such a list of status flags can be specified.

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

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

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

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

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

You can then now key in all the possible values in the grid.
6.3 Administration: Templates Manager

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

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

<table>
<thead>
<tr>
<th>Template</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify Caller On New Ticket Allotment</td>
<td>HTML template used on automated notification email sent to the caller when a trouble ticket is logged in SharePoint.</td>
</tr>
<tr>
<td>Notify Technician On Ticket Assignment</td>
<td>HTML template used on automated notification email that is sent out to a technician, informing about the assignment of the ticket.</td>
</tr>
<tr>
<td>Notify Technician On Reply Received</td>
<td>HTML template used on automated notification email that is sent out to the assigned technician when there is an escalation from the caller. (i.e., when a caller replies to an existing trouble ticket)</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Variable</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIT_TICKET_ID</td>
<td>Ticket Number of the generated trouble ticket.</td>
</tr>
<tr>
<td>TIT_SUBJECT</td>
<td>Subject of the email or the support ticket</td>
</tr>
<tr>
<td>TIT_BODY</td>
<td>The body or description field of the email sent by the caller</td>
</tr>
<tr>
<td>TIT_CALLER_NAME</td>
<td>Name of the caller or sender of the email</td>
</tr>
<tr>
<td>TIT_CALLER_EMAIL</td>
<td>Email of the caller or sender of the email</td>
</tr>
<tr>
<td><strong>TIT_CALLER_COMPANY</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_CONTACT_NUMBER</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_TECHNICIAN</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_PROBLEM_CATEGORY</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_PROBLEM_TYPE</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_PROBLEM_STATUS</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_DUE_DATE</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_TICKET_URL</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_RESOLVED</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_RESOLVED_DATE</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>TIT_GENERATED_DATE</strong></td>
<td>-</td>
</tr>
</tbody>
</table>

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

4. A *WYSIWYG* HTML editor with which you can customize the contents, apply HTML formatting as well as insert the placeholder variables. The look and feel as well as the buttons and functionalities are similar to Microsoft FrontPage authoring tool.

5. The actual content of the email notification - Description or Body.
6.4 Administration: Advanced Team Options

Ticket Settings

6.4.1 - Allow Un-tag and reset of published mail item in Outlook

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

If you want to change this, (i.e., allow raising ticket from an email multiple times, say to multiple SharePoint lists), you can enable this option, so that, you can simply click the button ‘Untag #Ticket ID’, to remove references of any earlier ticket that was tagged to an email, and raise a trouble ticket to another SharePoint list.
6.4.2 - Allow Pre-filling information on new Ticket generated from an email

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

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

When this option is enabled, you would have the option to mark a particular SharePoint ticket as resolved directly from Outlook, by clicking the ‘Mark Resolved – Ticket #Ticket ID’ button, available when you open an email item, that is sent or received in continuation to an existing ticket.

When it is marked resolved, the ‘Resolved’ field of the SharePoint ticket item would be set to TRUE.

6.4.4 - Allow adding own Problem Category and Type Value

When this option is enabled, you would be able to add your own Problem category that does not exist in the Problems list.

In the same way, this feature of allowing you to add your own problem value instead of selecting one from the drop down list is enforced in the SharePoint list too.
When this option is not enabled:

When this option is enabled:

6.4.5 - Allow adding own Problem Status value
Likewise with Problem Category and Type fields, you can also add your own problem status value, instead of choosing one from a pre-defined drop down list.

6.4.6 - Clicking the URL or button in Email Opens the SharePoint ticket in
You can choose if the SharePoint ticket list item will be opened in read only state or in edit state in your web browser when you click the ‘Open Ticket’ button or the ‘SharePoint Ticket #Ticket ID’ hyperlink in the email body.
6.4.7 - Changes in drop down list of Problem Category, Type or Status should

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

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

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

6.4.8 - Changes in drop down list of custom fields should

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

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

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

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

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

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

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

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

Person or Group - If the person/group is selected, you will see that, the data type for ‘SenderName’ field displays ‘User’ in the mapping tool. It means, you can only map this ‘SenderName’ field to a person or group data type of the SharePoint list.
Do note that, in the SharePoint ticket item, Issue Tracker add-in would try to use the equivalent user name as defined in the SharePoint site. For this to work, the email address of the caller (or sender) should match in both the Active Directory (GAL) and the SharePoint site. If an equivalent user does not exist in the SharePoint site, the ‘SenderName’ field in the SharePoint list would display empty.

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

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

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

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

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

6.4.15 - Add Technician field in the Outlook view for tracking purpose
When you raise a trouble ticket from an email, and if you had assigned a technician to deal with that ticket, Issue Tracker can add a custom field ‘Technician’ in your Outlook view such that, it will store and display the assigned technician name.
6.4.16 - Automatically track incoming replies and update the SharePoint ticket

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

With such automation, the SharePoint ticket item and description field will be updated live automatically, as and when the email is received. This greatly enhances the productivity of the helpdesk because, you are not required anymore to monitor the mailbox for new replies from caller, nor there is need to add and update the new information to the relevant ticket manually. Issue Tracker system automatically does that for you.
Note that, only incoming emails that contain the tracking code in the subject would be automatically processed. You need worry about the risk of unrelated or private emails getting added inadvertently to the SharePoint ticket. If you have an email that does not have this code, but you want to relate that email to an existing SharePoint ticket item, then you will have to manually add the email to an existing ticket using the ‘Add to Existing Ticket’ button.

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

With such automation, the SharePoint ticket item and description field will be updated live automatically, as and when a response is sent out. This greatly enhances the productivity of the helpdesk because, you are not required anymore to add and update the new information that was sent out to the caller, in the relevant ticket manually. Issue Tracker system automatically does that for you.
Note that, only outgoing emails that contain the tracking code in the subject would be automatically processed. If the outgoing copy of the email that does not have this code, they are ignored. So, you don’t have to worry about unrelated or private emails getting added inadvertently to the SharePoint tickets.

6.4.18 and 6.4.19 - Use the following mailbox account for all outgoing automated notifications:

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

This helps in having a central account that Issue Tracker can not only send out emails, but also monitor for replies from callers, thereby enhancing the overall response speed to support requests.
Note: To work with this feature, you need to have 'Send on behalf' over this mailbox account. You do that from the windows server: *Active Directory Users and Computers* > *Common account* > *Properties* > *Exchange General* > *Delivery Options*.
Attachment Settings

1. **6.4.20 - Retain attachments in SharePoint Ticket Item**
   If enabled, Issue Tracker will also upload the associated attachments from Outlook mail item to the SharePoint ticket item. And the attachments will appear as hyperlinks at the bottom of the SharePoint list item.

   ![Attachments](image)
   *Attachments are uploaded automatically to SharePoint, and can be easily retrieved from these links*

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

3. **6.4.21 - Upload Outlook mail item as MSG file attachment within the SharePoint Ticket Item**
   If this is enabled, Issue Tracker will generate a MSG file format of the Outlook mail item, and will be uploaded as attachments to the SharePoint ticket item.

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6.4.22 - Retain embedded images in SharePoint item

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

**In Outlook mail Item:**

![Embedded image in Outlook Item]

**In SharePoint ticket item:**

![Embedded image in Outlook Item]

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**Detailed Description:**

"Hi Francis, I hope you are well. I also have a question regarding the existing case. Also, when a technician creates a case in TWA, it appears in History. Once a case is closed again, it is causing nothing to be sent to History for TWA."

(Although the case does appear in the Resolve nothing to be sent to History for TWA?"
**Notification Settings**

1. **Do not send notification to caller if no technician is assigned to the Ticket**
   - Enabling this option would force Issue Tracker to only send out the notification email to the caller if a technician was assigned.

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

3. **Send notification to technician when a new reply from the caller is received**
   - This automated email is sent out to the assigned technician when the caller replies back to escalate the ticket.

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**6.4.23 - Send Confirmation notification to Caller when a new ticket is generated**
- This automated email is sent out as a confirmation notification to the sender or caller, when you raise a trouble ticket into a SharePoint list from an email.

**6.4.24 - Send notification to Technician when a ticket is assigned**
- This automated email is sent out to the assigned technician informing about the ticket, and to start working on it. The email may contain the direct URL to the SharePoint ticket and enables the technician to access it directly, without needing to search for it in the SharePoint list.
7. Uninstalling Issue Tracker

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

**Step 1:** In Windows XP, open ‘Control Panel > Add or Remove Programs’. In case of Windows Vista or Windows 7, go to ‘Control Panel > Programs and Features’. Scroll down to select ‘Issue Tracker Personal’ and click ‘Uninstall’.

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

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

**Issue Tracker for Outlook and SharePoint - Home page**
Go to the official website of Issue Tracker for Outlook and SharePoint.

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

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

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

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

Have any queries? **Contact us through Live Chat**
Now you can receive efficient help faster! Whenever you need support, you can simply visit this particular link and initiate a chat session with our support technicians! You don't need to download and install anything to your system. It doesn’t get easier than this.