

Build Reports and Do Searches With Outlook Help Desk and Exchange Public Folders

Outlook Help Desk tickets provide a rich data store about Help Desk activity and past and current issues. There are many ways to take the advantage of this rich repository of information, several of which are discussed below.

Reporting

To track the progress of tickets, see how many are still open or closed, or produce daily, weekly and monthly reports, we provide **Report Builder** in the Reports folder. This allows you to export ticket data to an Excel spreadsheet or comma-delimited Text file. You may also want to use *Crystal Reports*, which can produce comprehensive and stylish reports from Microsoft Exchange and Outlook data sources.

Report Builder will extract all fields from a ticket or you can select which fields to export. Also, you can filter by date or completion status. For instance, if you wanted to do a Weekly Report of tickets completed, you might select the fields "Ticket ID, Summary, End User, Date Received, Status" and Filter by Status of "Completed" with a Date Range of "7 days". This will create an Excel spreadsheet or Text file with all tickets that were received and completed in the last week.

The screenshot shows the 'Report Builder - Report Builder 30 (Rich Text)' window. The interface is divided into several sections:

- REPORT BUILDER**:
 - Name of Report:** A text box containing 'Report Builder'.
 - Folder to export:** A text box containing 'Assigned Help Desk Tickets' and a 'Change Folder' button.
 - Fields to export:** A list of fields with checkboxes. The 'Select all fields' checkbox is unchecked. Selected fields include: Ticket ID, Summary, For user (Enduser), Date Received, and Status.
 - Export to:** Two radio buttons: 'Excel' (selected) and 'Text File'. The 'Text File' option has a note: 'Creates, but does not display, a comma-separated txt file. Enter file path and name below.'
 - Text File Path:** A text box.
 - Text File Name:** A text box containing '.bit'.
- Filters**:
 - Text: 'For more filtering options, use the Advanced Filtering tab.'
 - Filter By Status:** A dropdown menu showing 'Completed Tickets'.
 - Filter By Date Range:** Radio buttons for 'All Tickets', 'Past 7 days', 'Past 30 days', 'Month to date', 'Year to date', and 'Specific Date Range'. Below are two text boxes for 'None' and 'To'.
 - Text: '(Words like Now, Yesterday, One week ago, etc., can be used in these boxes.)'
 - Date field to use in filter:** A dropdown menu showing 'Date received'.
 - A 'Close' button at the bottom right.

There are many other ways to use **Report Builder**. For instance, you can easily switch folders with the "Change Folder" button and export tickets from another folder. You can filter on Open, Completed, or Overdue tickets. You can set any date range and decide what date field to use in the filter.

In version 3.0, you can create a report and then save it by giving it a name, then going to File/Save. This will put it into your Drafts folder. You then drag-and-drop it from the Drafts folder to the Reports folder. This "report template" will now be available for future use at any time. Outlook Help Desk comes with several report templates already in the Reports folder.

On the Advanced tab, you can use 11 other fields to filter the reports. For instance, if you want to see all tickets for only one user, you can enter that name on the End User line and only tickets for that user will be exported. You can use Problem Category and Type in the same manner. This allows you to very easily do highly custom reports like "Which tickets involved printers in the Accounting department in Chicago last month?"

Report Builder - Report Builder 3.0 (Rich Text)

File Edit View Insert Tools Actions Help

Report Builder Advanced Filtering

Advanced Filtering

To filter on any of the fields below, enter text in the boxes below. Separate multiple filter criteria by semi-colons. Leave the box blank if you do not want to filter on that field.

End User

Department

Office

Computer Name

Model/Maker

Technician

OS

Problem Category

Problem Type

Ticket Source

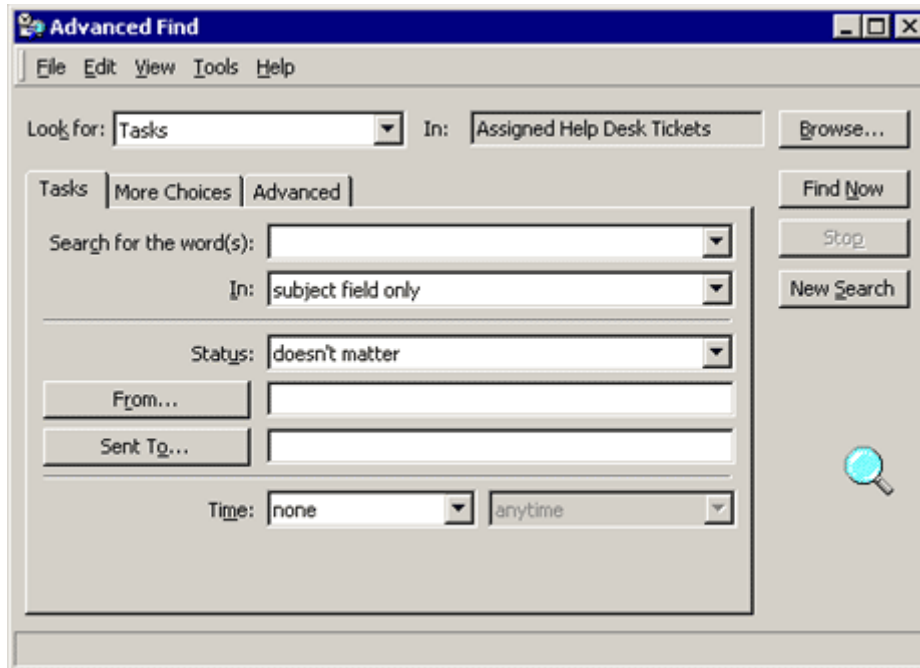
Asset No.

Searches

The Tickets are in Exchange public folders that can be searched using Outlook's Find and Advanced Find features, as well as any third-party tool that can read the Exchange database. To use Outlook's Find, simply go to Tools/Find. This provides a basic search.

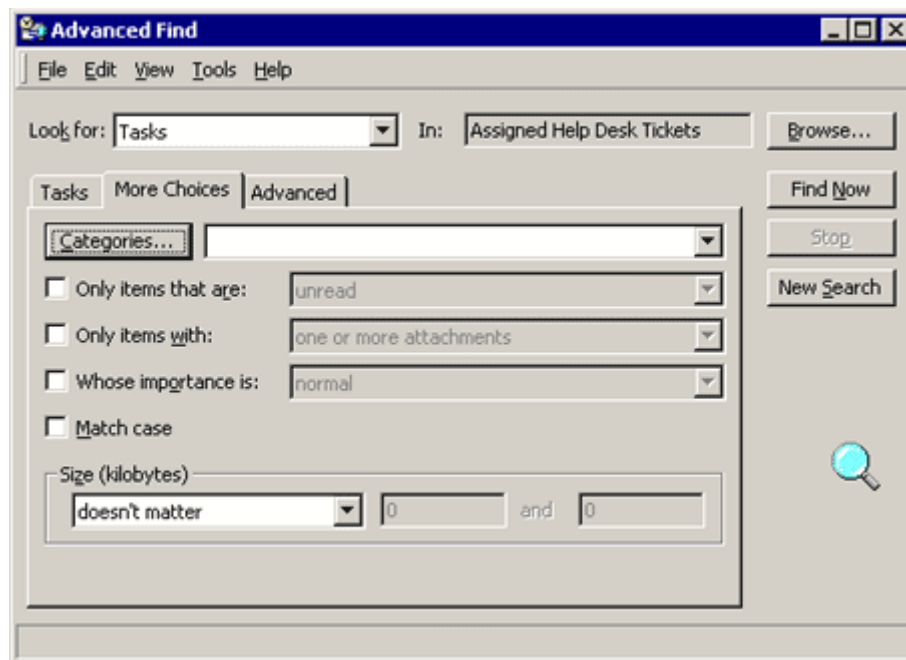
Advanced Find has much more functionality. To activate, go to Tools/Advanced Find. This Outlook utility has many options which allows you to build very exacting searches. Searches can be saved with the File/Save Search option. The searches are saved as *.oss files. They can be used for later searches by going to File/Open Search in Advanced Find.

First, choose "Tasks" in Look For:, then Browse to the folder you want to search.

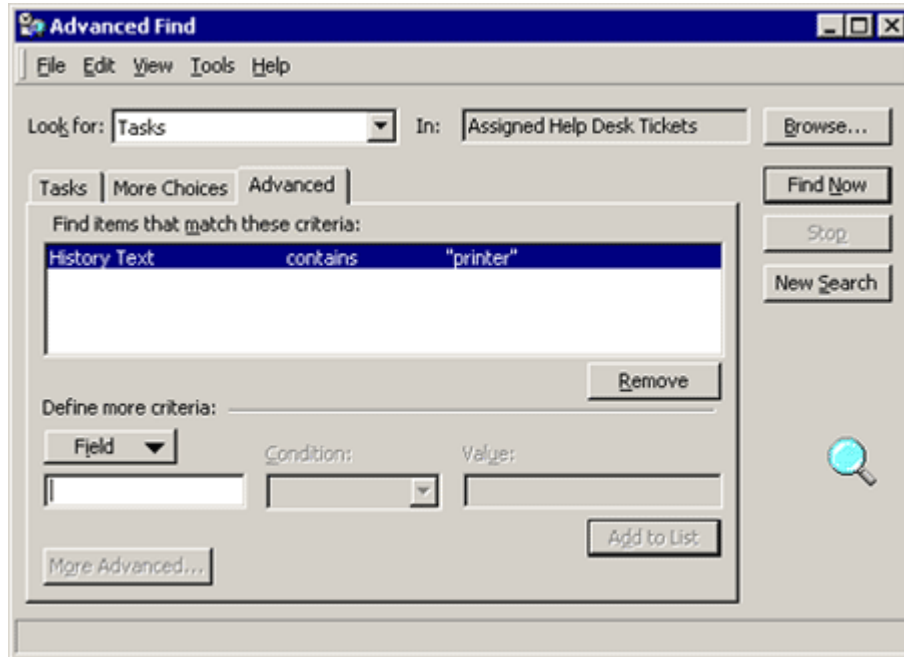


On the first screen, you can search for specific words in the subject (Summary) and notes (Description) fields, while also choosing Status, From, To, and Time.

The second tab gives you more choices:



The third tab provides very specific searches and is very useful for searching the custom fields on the Help Desk Tickets, such as Problem Category or History Text (History Log). The trick here is to use the "Fields" drop-down list and choose "Assigned Help Desk Ticket 30" to see the list of fields available.



Advanced Find can produce very capable and exact searches. You can use it on a Tickets folder to find past issues and important data quickly.

Another way to find Tickets that meet certain criteria is to set a Folder View with a Filter to show only those tickets that meet the Filter criteria. Placing a filter on a folder view is like Advanced Find in that a restricted list of tickets is returned. The difference is that Advanced Find will display the tickets in a list in the Advanced Find utility whereas Filter will show the tickets in the Folder View.