

## Using Folder Views Effectively in CCS Service Request

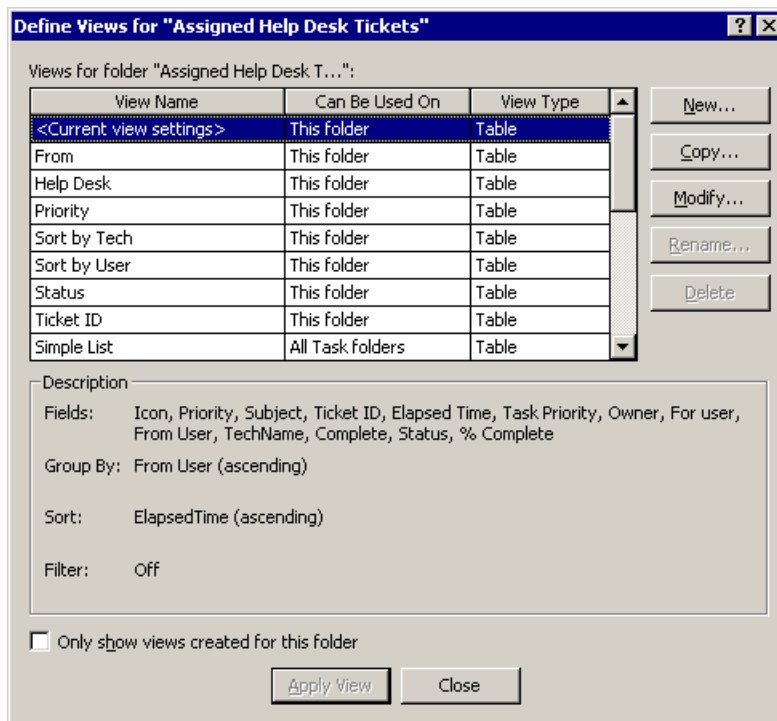
(Note: There is extensive documentation on grouping, sorting, filtering and displaying folder items in the Microsoft Outlook Help, "Organizing and Viewing Items in Outlook", but we will cover some basics here.)

Folder views are a powerful way to organize your Service Requests. The views can be used to group, sort and filter tickets. By choosing which fields to display and how to group or sort the tickets, you can view them in many different ways. For instance, the "Assigned Service Request Tickets" folder comes with a default view "Sort by User". This groups the tickets first by the user, then lists each ticket with the subject, priority, tech name, status, and % complete.

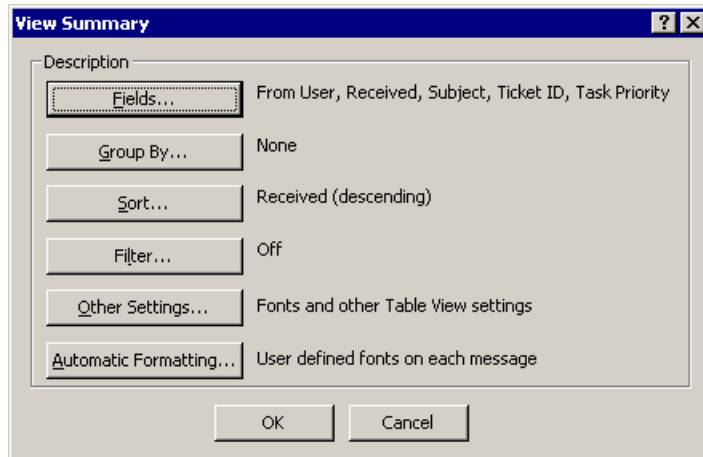
You can easily switch between views using the View/Current View list. To set the default view for the folder, right-click the folder, then choose Properties. Select the Administration tab and use the "Initial view on folder:" drop down list.

Folder views can be modified or new ones created in Outlook using View/Current View, then Define Views or Customize Current View. "Define Views" will create or modify an existing view and save it so that these views can be used by others. "Customize Current View" will change the view just for the Outlook client you are using.

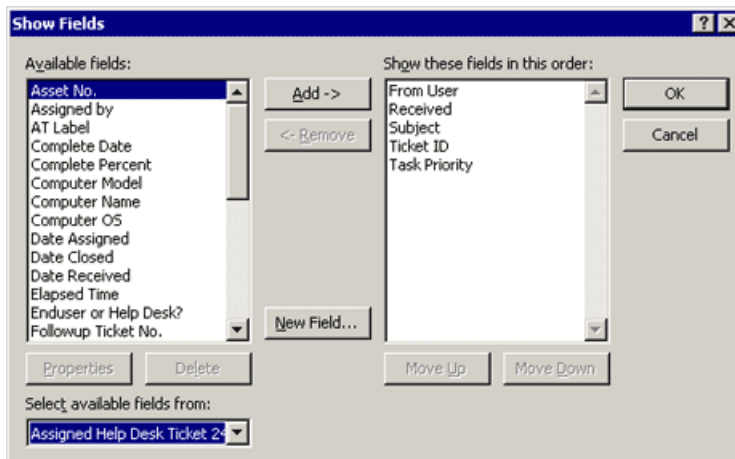
To get to the Define Views screen, go to View/Current View/Define Views



Choose New or Modify to see the View Summary.

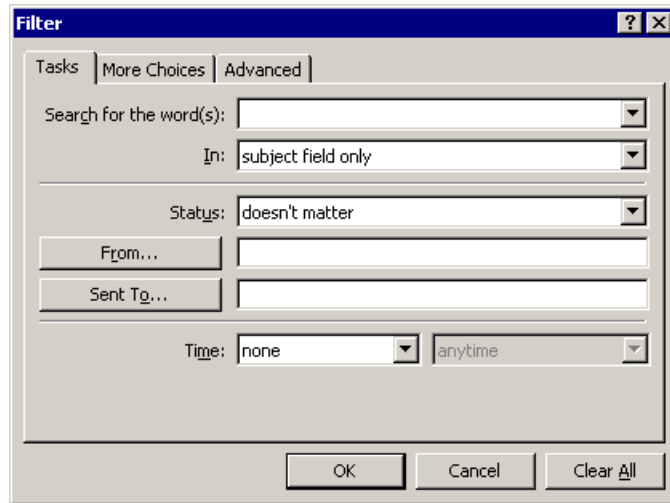


From this View Summary, you can create or modify views. The six buttons give you many options and are well worth exploring. "Fields" will allow you to select which fields to display, including the custom ones in the Service Request tickets.

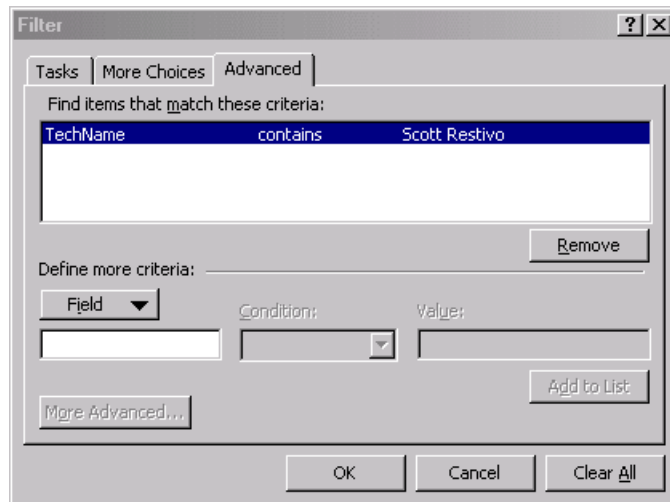


To sort or view using custom fields, use the "Select available fields from:" drop-down list (this drop-down list is available with the "Fields", "Group By", and "Sort" buttons). Select the appropriate form from this list. This will change which fields are available for grouping, sorting and viewing.

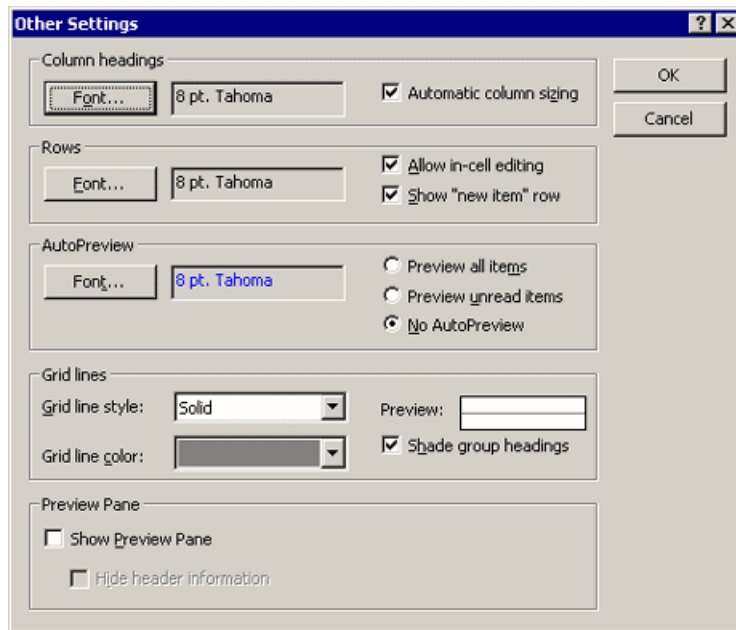
**Filter** looks and acts a lot like the Advanced Find utility (see [Searches](#)). It will restrict what tickets are displayed in the folder view:



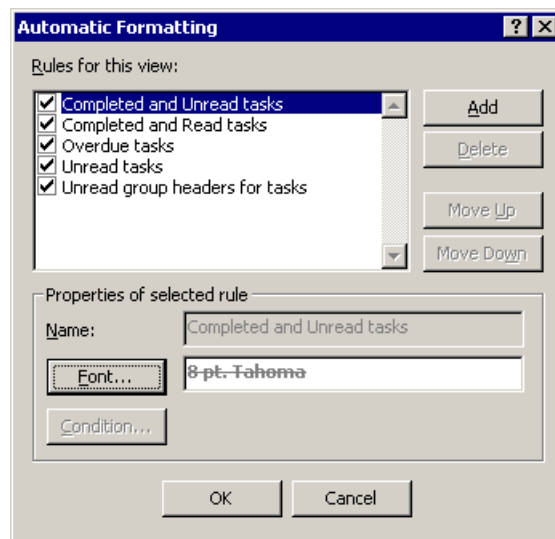
Filtering can also be used to show only the tickets assigned to a Technician. By choosing the Advanced tab, then using Fields drop-down list to find the Assigned Service Request Ticket form, the Tech can select TechName as the field and put in his or her name in the value box. This will filter the view so that the Tech only sees tickets assigned to him or her. There are many other filtered views that can be created, based on End User, Department, Location, or any of the other fields.



**Other Settings** has ways to set the fonts, etc., but most interesting are "Allow in-cell editing", which will let users change items without opening the ticket up, and "Show 'new item' row" which sets whether "Click here to open new" line shows at the top of the folder view. The "Click here" line is removed in the programs we send out, because our tickets should be opened and filled out, rather than just filled out in the folder view.



**Automatic Settings** is useful because you may not want Completed Tickets to have a Strikeout line through them (this makes the Summary difficult to read).



Notice the Strikeout checkbox when you press Font. Unchecking this will remove the line through the Completed Tickets.